

An aerial photograph of a beach with a long line of people in the water. The water is a vibrant turquoise color, and the sand is a light beige. The people are wearing red and orange life jackets, and they are standing in a line that stretches from the shore into the water. The title text is centered over the image.

WESTERN AUSTRALIA VISITOR ECONOMY STRATEGY 2033



Tourism
WESTERN AUSTRALIA

WESTERN
AUSTRALIA
WALKING ON A DREAM

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Aboriginal people as the Traditional Custodians of Western Australia, and pay our respects to Elders past and present.

We celebrate the diversity of Aboriginal West Australians, and honour their continuing connection to country, culture and community.

We recognise and appreciate the invaluable contributions made by First Nations peoples across many generations in shaping Western Australia as a premier destination.

CONTENTS

Message from the Premier	4
Message from the Deputy Premier and Minister for Tourism	5
Message from the Chair	6
Message from the Managing Director	7
Context	8
Vision	14
Strategy on a Page	16
Target Outcome	18
Guiding Principles	22
Goal Areas	24
- Aviation	26
- Accommodation and Attractions	28
- Events	30
- Aboriginal Tourism	32
- Destination Brand	34
- High Performing Industry	36
Measuring and Monitoring	38
APPENDIX – INITIATIVES	40

MESSAGE FROM THE PREMIER

I am extremely proud to present the 10-year strategy for the visitor economy in Western Australia, known as the Western Australia Visitor Economy Strategy 2033 (WAVES 2033).

The Tourism portfolio is close to my heart. I am very familiar with the industry, the people, the challenges, and the opportunities. It has unmatched economic potential, and I am confident that this strategy will take the visitor economy to new, sustainable heights.

It is important to acknowledge, the COVID-19 years were difficult for many tourism operators, with borders closed and international and interstate visitation severely restricted.

The Western Australian (WA) Government demonstrated its commitment to the industry during this time, through funding schemes that ensured operators not only survived but were able to adapt their offerings to continue to make a living.

Growth of the visitor economy builds on the vision that the WA Government sets out in its Diversify WA framework for a more diversified economy and a tourism industry that combines commerce, community, and culture, and brings them together in a way that engages with our incredible natural assets.

The record budget of \$530 million allocated to Tourism WA over the next four years, demonstrates our Government's commitment to tourism and the visitor economy, and will enhance marketing, aviation, destination development, and events activity across the state.

WAVES 2033 targets growth in visitor spend and growth in tourism jobs, but it also reflects my desire to celebrate and preserve Western Australia's rich First Nations culture. Aboriginal tourism is the beating heart of the strategy, not only because it is a major point of difference for Western Australia, but also because it is important for visitors and our community alike to acknowledge and learn about the oldest living culture on the planet.

HON. ROGER COOK, MLA

Premier of Western Australia



MESSAGE FROM THE DEPUTY PREMIER AND MINISTER FOR TOURISM



We are living in exciting times for the visitor economy, and for our state's tourism industry in particular.

The thirst for travel has never been greater, and Western Australia is well positioned to welcome new and returning visitors. Western Australia has a solid base of tourism offerings, but we need to develop and grow in order to attract the high yield traveller of the future.

The aim of WAVES 2033 is to sustainably drive the visitor economy to new levels of success. Following the opening of international and interstate borders on 3 March 2022, visitor spend in Western Australia reached a record \$14 billion in the calendar year 2022.

This demonstrates that our economy and industry are in a strong position to deliver this strategy through aligned and collaborative action across the tourism industry.

The WA Government's commitment of over half a billion dollars to Tourism WA over the next four years, recognises that competition for the visitor dollar has never been greater.

Through high-profile marketing, the attraction of major events, securing strong aviation connectivity and cross-government initiatives to ensure that Western Australia offers exceptional tourism experiences - Tourism WA will lead the post-COVID-19 recovery of our visitor economy.

WAVES 2033 will take us even further. This focused strategy has identified areas of major growth potential, which will contribute towards a significant uplift in the visitor economy and job growth.

It recognises that tourism is everyone's business and is built and delivered through collaboration.

I look forward to seeing the WA Government and industry collaborating and working together to deliver the initiatives set out in this strategy.

HON. RITA SAFFIOTI, MLA

Deputy Premier of Western Australia

Minister for Tourism

MESSAGE FROM THE CHAIR

Western Australia is a wondrous and dreamlike place to explore, and must be experienced first-hand to be believed.

The premium nature of the state is not only characterised by its vast size and 20,000 km of coastline, but also through its 60,000 years of cultural heritage, otherworldly natural phenomena, warm climate, friendly people, modern capital city and outstanding gourmet food and wine.

Western Australia offers unparalleled experiences to visitors, from holiday makers to business travellers to international students. The visitor economy in Western Australia has the potential to be a key driver of jobs and prosperity for West Australians, and WAVES 2033 sets out the approach that will take the state from 'good' to 'record-breaking' over the next 10 years.

Emerging from the pandemic, Western Australia is well-placed to re-invigorate its identity as a world-class visitor destination. The launch of the state's global tourism brand, Walking On A Dream, in September 2022 was the beginning of our journey to position Western Australia as a dreamlike state that offers experiences and attractions that are truly unique, and celebrate cultures, communities and the environment.

The development of WAVES 2033 has been a wonderful opportunity to take a deep dive into Western Australia as a visitor destination and identify opportunities for the future. The development of the strategy, through widespread stakeholder engagement and research, ensures that WAVES 2033 is grounded in industry intelligence and insight.

Opportunities for growth have been categorised into six goal areas, focusing initiatives into groups that will make a significant difference to our state's visitor economy in the future. The Tourism WA Board, and Executive Management Team, are committed to working collaboratively across all tiers of government and industry to deliver the actions in the strategy, to achieve the ambitious growth targets outlined in WAVES 2033.

DI BAIN

Chair
Tourism Western Australia



MESSAGE FROM THE MANAGING DIRECTOR

I am proud to present the Western Australia Visitor Economy Strategy 2033 (WAVES 2033), which has been developed by Tourism WA.

This strategy is designed to further elevate Western Australia as a world-class visitor destination, with 10 years of impactful actions which we like to refer to as the 'Dream Decade'.

The launch of Walking On A Dream in 2022 was the start of the process - and with the support of the WA Government - Tourism WA will continue to drive marketing, events and destination experience development with the aim of growing visitor spend from \$14 billion in 2022 to \$25 billion in 2033.

This aspirational action plan for the future of tourism in Western Australia outlines so much more than what Tourism WA will do.

In consultation with multiple departments, WAVES 2033 addresses all aspects of the visitor economy, with the successful delivery of initiatives requiring collaboration and alignment in order to achieve the key strategic outcomes.

Tourism WA is committed to step change rather than incremental growth, both in terms of the increased number of visitors that we attract to experience the wonders of Western Australia through our marketing activities, as well as the exceptional standard of visitor experiences that are on offer.

Within the broader WA Government Department of Jobs, Tourism, Science and Innovation (JTSI), Tourism WA as the lead agency for the state's tourism industry, has a vital role to play in contributing to Western Australia's economic diversification and growth.

To achieve this outcome for our community and economy, Tourism WA aims to make Western Australia the premier destination for Aboriginal tourism in Australia, and the fastest-growing major events destination in the South East Asian region.

With WAVES 2033 as its primary guiding document, the agency is confident that these two deliverables, and all the outcomes set out within the strategy, will be met.

As the Managing Director of Tourism WA, I am committed to this ambitious and future-focused strategy, and I look forward to sharing updates and progress at regular intervals throughout the 'Dream Decade'.

CAROLYN TURNBULL

Managing Director
Tourism Western Australia



CONTEXT

JOURNEY TO DREAM

The time is right to look to the future and set a 10-year strategy for the Western Australian visitor economy.

Post-pandemic recovery is not yet complete, but stabilisation has enabled the WA Government and industry to understand the broader landscape, and what is required to advance the visitor economy in Western Australia as a powerhouse for diversification.

In the years prior to COVID-19, the visitor economy represented two per cent of the Total Gross State Product, and around five per cent of total filled jobs.

The phrase 'tourism is everyone's business' epitomises how the strategy has been developed and how the visitor economy in Western Australia will prosper and grow. More than 500 stakeholders across Western Australia supported the development of WAVES 2033 through a range of workshops and one-on-one consultations.

Western Australia has a strong intrastate visitor market, however, the key to driving step change performance by 2033 is attracting high yield travellers¹ from out-of-state, primarily from international markets.

Western Australian experiences and attractions are sought after by discerning and high yield travellers, and the objectives of this strategy will ensure that key target markets know what Western Australia has to offer, and that visitors have a world-class experience in our state.

This requires a strong focus on re-establishing and expanding access and growing the range and density of infrastructure and experiences.

DEFINING THE VISITOR ECONOMY

The visitor economy encompasses a wide range of industries that offer goods and services to individuals travelling for holiday, visiting friends and relatives (VFR), business and international education.

The Western Australian tourism industry operates in a high value globally-competitive market.

In recognition of the breadth of the industry, this strategy adopts a broader perspective of the visitor economy that encompasses all types of visitors and businesses involved in delivering visitor facing services throughout the entire visitor experience.

It recognises that people travel for many purposes beyond leisure and there are numerous individuals and businesses catering to these visitors.

The makeup of the Western Australia visitor economy in terms of visitors and visitor spend is shown in the charts.

International: short-term (less than one year) visitors from outside of Australia

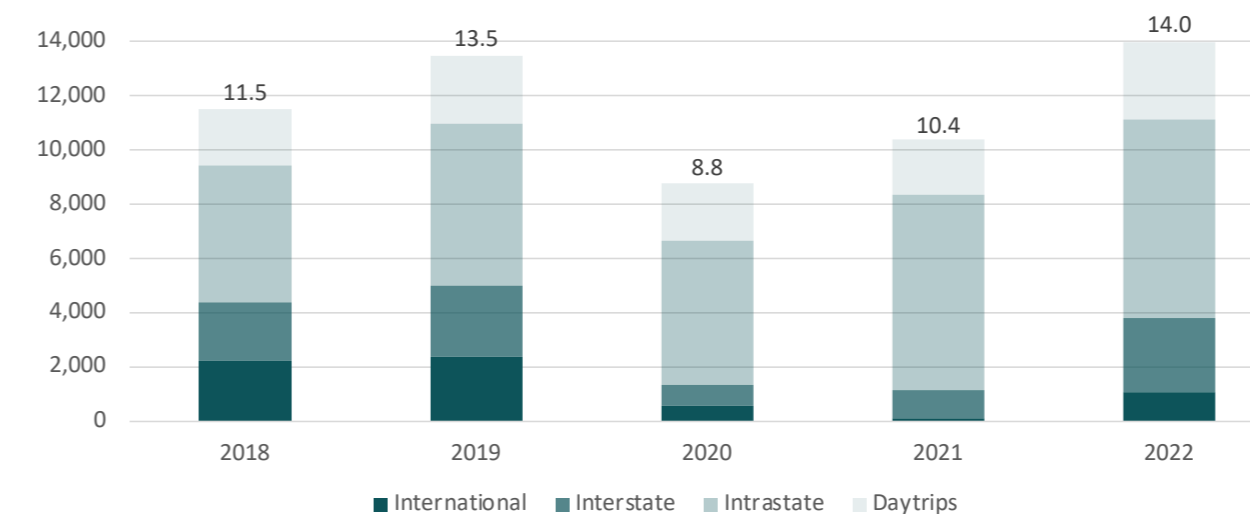
Interstate: residents of Australian states and territories outside of Western Australia

Intrastate: West Australians travelling within their own state overnight

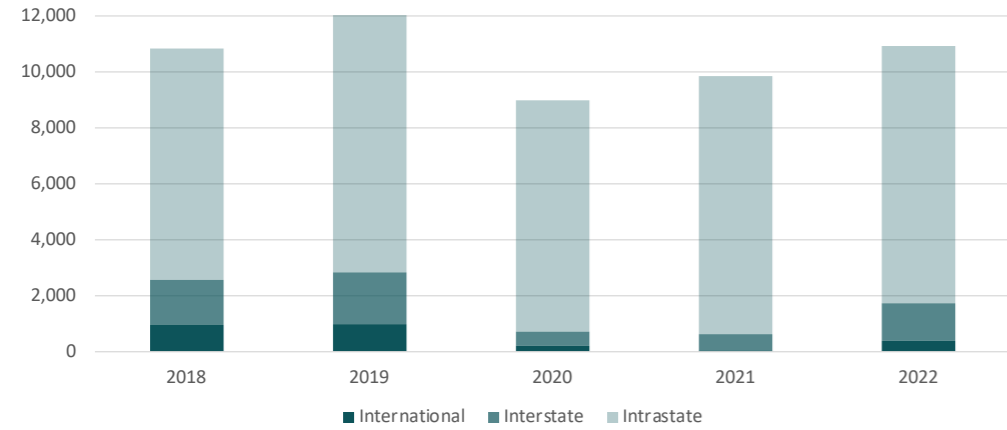
Daytrips: largely intrastate, travelling greater than 50 km round trip in one day

¹ High yield travellers are defined by Tourism Australia as those who travel long-haul, have a preference for Australia, are attracted by what Australia has to offer, and have above average trip expenditure.

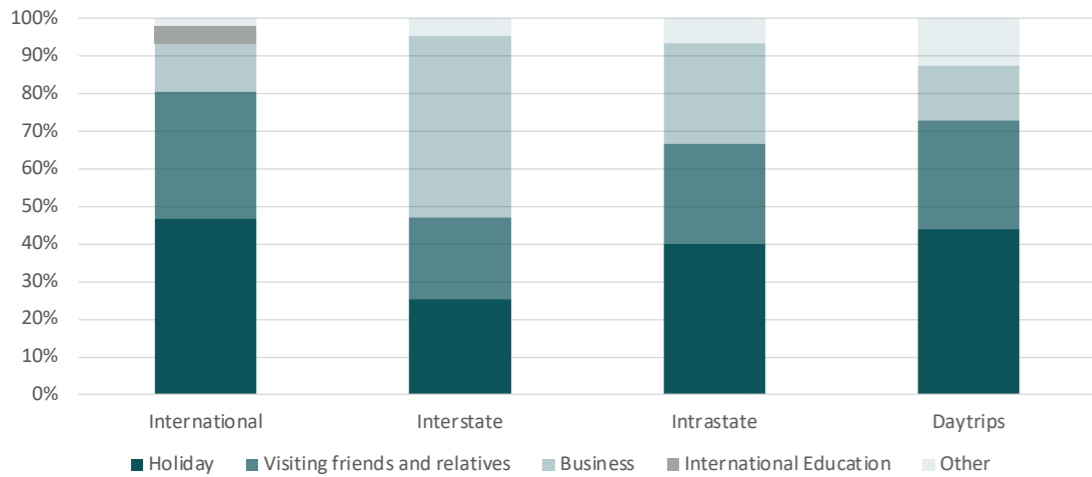
VISITOR SPEND BY MARKET (\$ BILLION)



OVERNIGHT VISITORS BY MARKET (OOO'S)



2019 VISITOR SPLIT BY MARKET AND PURPOSE OF VISIT



Sourced from Tourism Research Australia, International and National Visitor Surveys

THE TIME IS RIGHT TO LOOK TO THE FUTURE AND SET A 10-YEAR STRATEGY FOR THE WESTERN AUSTRALIA VISITOR ECONOMY.

IMPACT OF THE PANDEMIC

The COVID-19 pandemic had an unprecedented impact on the world, and in particular on the global visitor economy.

By the middle of 2020, most countries had closed their international borders as COVID-19 outbreaks were met with heightened restrictions. International travel stopped completely. Economies around the world were forced to defend and survive, focusing on the immediate rather than the medium- and long-term strategies. Over time, nations opened up with the confidence that they could live with COVID-19.

For Western Australia, the impacts of COVID-19 within the state were fewer than for many other locations. International and state border closures, and strict protocols, meant that cases of the virus were limited. For much of 2020 and 2021, West Australians were able to travel freely within the state.

While the visitor economy was impacted by the lack of international and interstate visitors, intrastate travel was on the rise, with average length of stay, and average spend per night reaching record levels.

Western Australia's international and national borders fully reopened on 3 March 2022.

Despite some continued reservations about travel, and restricted aviation routes as airlines recovered from two years of being grounded, recovery was strong, and visitor spend in the state surpassed pre COVID-19 levels in 2022, totalling \$14 billion.

LOOKING AHEAD

Tourism Research Australia (TRA) has forecast full recovery for domestic visitation and spend in 2023 and international visitation by 2025 across Australia. Western Australia is expected to follow a similar pattern.

Experiences over the pandemic years, and underlying trends that were evident prior to COVID-19, will inevitably shape the size and balance of visitation and spend in the future.

- Technology advancements have been accelerated through COVID-19. These advancements impact how people discover, book and experience travel.
- Sustainable and accessible tourism are increasingly expected rather than niche requirements, and the modern tourist is seeking opportunities to grow and learn through authentic cultural experiences.
- Competition to attract visitors of all types is fierce across destinations.
- There is a growing desire for travel from many developing countries.

THE STRATEGY CREATION

Two key aspects of the strategy's creation were stakeholder engagement and the reference and inclusion of related strategies and initiatives.

In 2022, widespread consultation took place across the state in all five tourism regions to inform the development of the 10-year Tourism Destination Management Plans (TDMPs).

More than 500 stakeholders contributed to the TDMPs, identifying challenges and opportunities for each region. The process involved engaging over 150 agencies across state and local government; more than 380 tourism organisations and hospitality enterprises; and a range of important and interested parties, including Aboriginal Corporations and local businesses affected by tourism and education providers.

This feedback formed the baseline for the content of WAVES 2033.

Additionally in 2023, the WAVES 2033 consultation process included 14 WA Government agencies, more than 25 industry stakeholders, and multiple forums with government and industry representatives.

These groups were asked for their views on the challenges and opportunities facing Western Australian tourism, and ideas that would make a significant difference to the sector.

The stakeholders provided valuable insights

through the development of WAVES 2033 and are integral to its delivery.

The visitor economy touches many areas of the wider economy, and therefore it is important for the strategy to recognise and incorporate other current and future developments that will impact visitation.

Therefore, the development of WAVES 2033 included investigation and reference to a significant number of plans and strategies, including:

- The Commonwealth Government's THRIVE 2030
- The WA Government's State Infrastructure Strategy and Diversify WA
- Local government strategies
- Regional Development Commission (RDC) plans
- Industry-body strategies, and
- Tourism WA-led strategies including:
 - o Jina: Western Australian Aboriginal Tourism Action Plan 2021-2025 (Jina Plan)
 - o The Western Australian Cruise Tourism Strategic Plan 2023-2033, and
 - o The Vision for Dream Events

Tourism WA holds stewardship of WAVES 2033 which has been formulated through the participation of all stakeholders to create a strategy that includes initiatives that reach across government and industry.

Tourism WA will monitor and report on the progress of all initiatives, and their contribution to the achievement of the overall target outcome.

THE VISITOR ECONOMY TOUCHES MANY AREAS OF THE WIDER ECONOMY, AND THEREFORE IT IS IMPORTANT FOR THE STRATEGY TO RECOGNISE AND INCORPORATE CURRENT AND FUTURE DEVELOPMENTS THAT WILL IMPACT VISITATION.

VISION

WESTERN AUSTRALIA IS RECOGNISED AS A WORLD-CLASS DESTINATION, IMMERSING PEOPLE IN OUR UNIQUE CULTURES, COMMUNITIES AND ENVIRONMENT.

THE STRATEGY ON A PAGE

'THE DREAM DECADE'

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

Increase the size of the visitor economy to \$25 billion by 2033.

SUSTAINABLE

INCLUSIVE

COLLABORATIVE

INNOVATIVE

Aviation



Accommodation & Attractions



Events



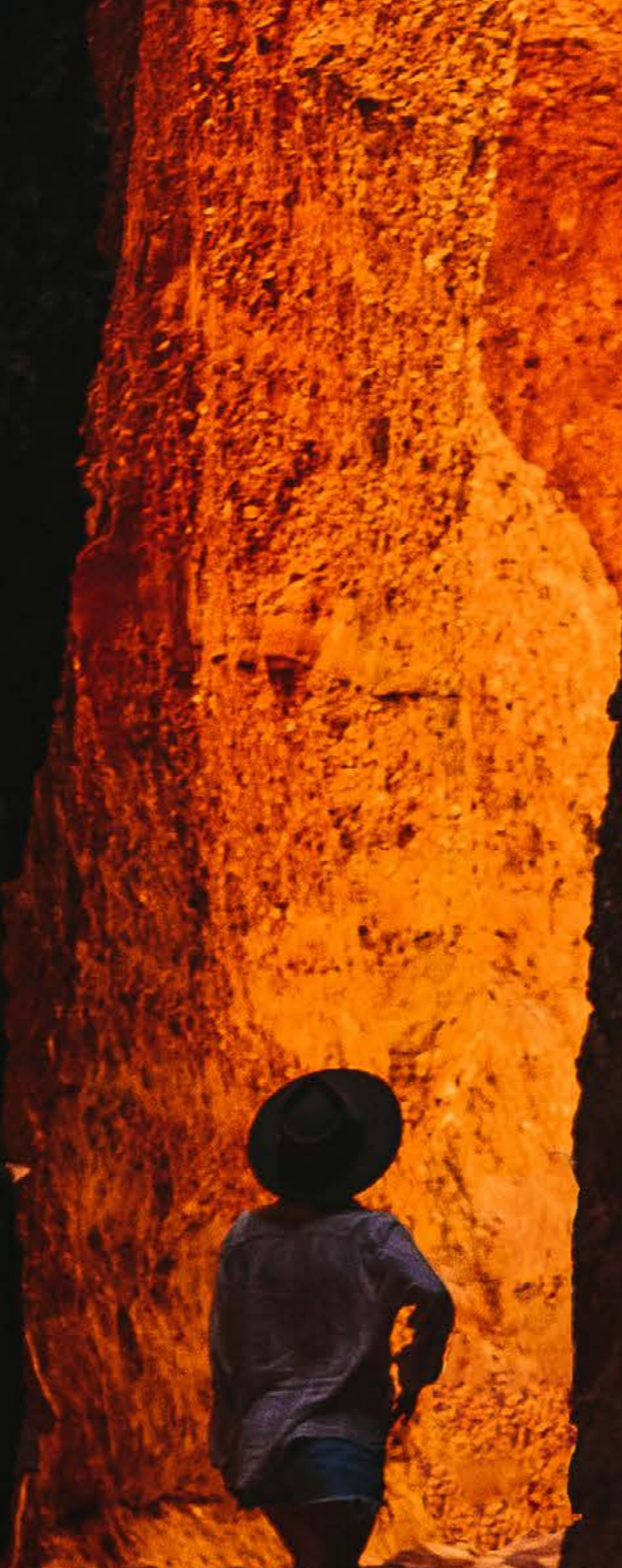
Aboriginal Tourism



Destination Brand



High Performing Industry



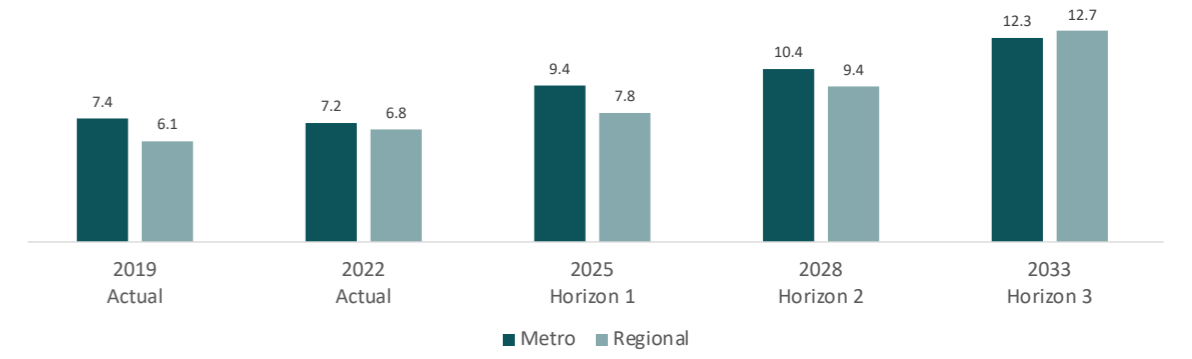


TARGET OUTCOME

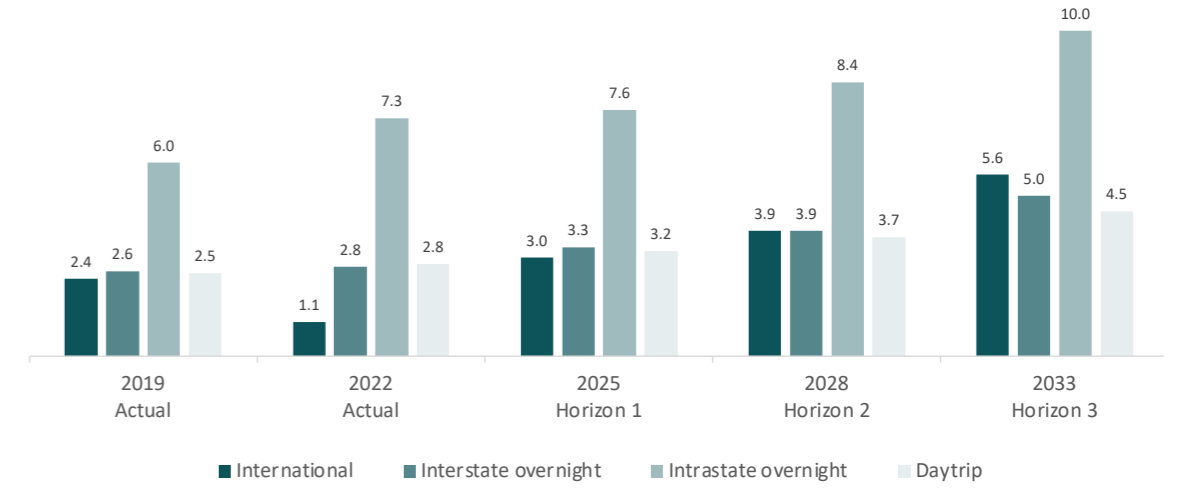
GROW THE SIZE OF THE VISITOR ECONOMY TO \$25 BILLION BY 2033.



VISITOR SPEND TARGETS METRO/REGIONAL (\$ BILLIONS)



VISITOR SPEND TARGETS INTERNATIONAL/DOMESTIC/DAYTRIPS (\$ BILLIONS)



Actuals sourced from Tourism Research Australia International and National Visitor Surveys

GUIDING PRINCIPLES

The Guiding Principles underpin all we aim to achieve through the WAVES 2033 strategy. They are holistic and all-encompassing. They will feature throughout our delivery, interaction and decision making as we grow the visitor economy.



SUSTAINABLE



INCLUSIVE



COLLABORATIVE



INNOVATIVE



SUSTAINABLE

We must be a force for a better future. We are dedicated to preserving the balance between our environment, social wellbeing and economic prosperity.

We will create economically-sustainable solutions for the industry that have a net positive impact on people and the planet.

Sustainability is increasingly influencing traveller choices in terms of where to go, how to get there, where to stay and which experiences they engage with at the destination.

Studies show that more than 75 per cent of travellers are committed to sustainability in some way.

This is shaping demand for low-carbon footprint travel options and experiences that touch the earth and its communities lightly, leaving places and people better off than when they arrived.

This principle not only caters to the demands of the traveller, but also ensures the longevity of the industry by preserving the deep connection to the land and environment that visitors and West Australians are seeking.

This can be achieved by building sustainable benchmarks within a to-be-developed sustainability plan, which successfully balances our obligations to people, the planet and the economy.



INCLUSIVE

Inclusivity is at the heart of everything we do.

We are open, inclusive and accessible to all people, and we embrace the knowledge we gain from diverse groups, guided by the wisdom of Aboriginal culture.

We provide opportunities for all West Australians and visitors to safely and respectfully connect with our various communities, and in turn enrich their lives.

Inclusivity as a key aim embraces the welcoming nature of West Australian people and is brought to life by everyone who lives in or visits Western Australia being equally welcomed. We seek to increase the diversity of the tourism workforce and harness this diversity to improve our visitor experience and community.



COLLABORATIVE

'Tourism is everyone's business'.

We take a systematic view of the industry to ensure that effort is not duplicated. Through collaborative and innovative practices, we ensure that the contributions of key players in the tourism ecosystem combine to create greater outcomes.

The cross-cutting nature of tourism means that WAVES 2033 sits within the context of a range of intersecting strategies and programs.

Collaboration is not only key to generating successful outcomes, but also ensures that solutions are supported and future focused. Collaboration will enable the removal of barriers, modernise ways of working, increase capabilities, and improve the way operators connect with consumers.



INNOVATIVE

We take a modern, innovative approach to providing access to and developing experiences for visitors to Western Australia.

From embracing digital, to encouraging industry to develop innovative business models, we seek ways to responsibly share our natural assets in a way that inspires, educates and entertains people. Technology and innovation underpin improvements

in productivity and competitiveness and can support better business resilience. Increasing innovation in tourism supports enhanced customer experiences, smoother business operations, cutting-edge attractions, and can reduce our environmental footprint. Approaching the opportunities and challenges before us with an innovative approach will ensure that the industry remains relevant and sustainable, now and into the future.

GOAL AREAS

Aviation	26
Accommodation and Attractions	28
Events	30
Aboriginal Tourism	32
Destination Brand	34
High Performing Industry	36

AVIATION

Aviation is a fundamental enabler for the Western Australian visitor economy, with 95 per cent of all out-of-state visitors arriving by air.

Growth ambitions for spend and visitors, especially for international, cannot be achieved without similar growth in aviation capacity. Equally, as Western Australia is such a large state, increased visitation to the regions also requires improved aviation connectivity.

This goal area incorporates all elements of aviation development - from airport infrastructure to airline capacity, to driving demand through marketing.

Close collaboration across all levels of government and industry will be required to ensure sustainable growth in seat capacity to and within Western Australia.

The WA Government's Aviation Recovery Fund (ARF), established in 2021, is designed to attract airlines back to Western Australia, help to develop new routes and increase capacity on existing routes, both domestically and internationally.

As airlines recover from the pandemic, prioritisation of routes has been heavily influenced by incentives, and the potential longevity and therefore, commercial viability, of those routes.

Tourism WA will continue to nurture relationships with airlines and look for opportunities to develop new direct routes and increase the frequency of existing routes into Perth and to the regions.

MEASURING SUCCESS

- International visitation
- International aviation capacity
- New direct international routes into Western Australia
- Airport infrastructure delivery through the Tourism Investment Monitor (produced by TRA) in comparison to other Australian jurisdictions

INITIATIVES

1. Airport Infrastructure

Support the delivery of fit-for-purpose state airport infrastructure and resources to enable increased international arrivals.

2. Airline Route Development

Work in partnership with industry to attract new inbound aviation routes and to build capacity on existing routes.

3. Aviation and Marketing Partnerships

Stimulate consumer demand via cooperative marketing partnerships to support the viability and growth of existing routes.

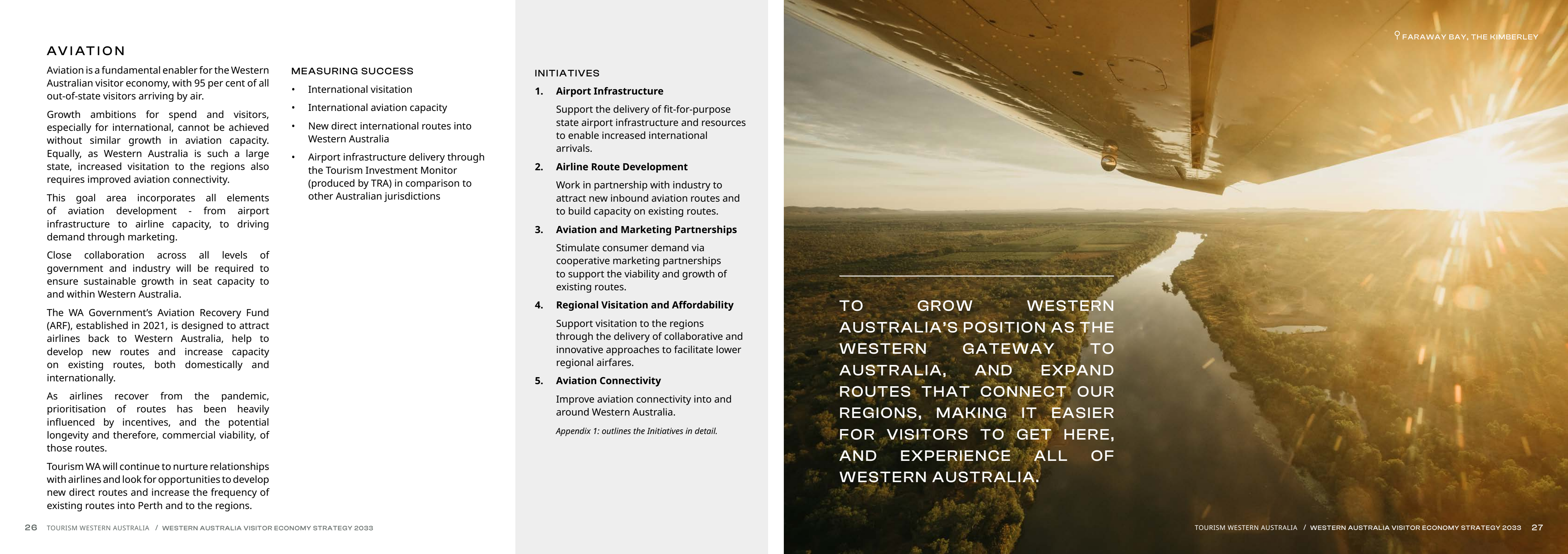
4. Regional Visitation and Affordability

Support visitation to the regions through the delivery of collaborative and innovative approaches to facilitate lower regional airfares.

5. Aviation Connectivity

Improve aviation connectivity into and around Western Australia.

Appendix 1: outlines the Initiatives in detail.



TO GROW WESTERN AUSTRALIA'S POSITION AS THE WESTERN GATEWAY TO AUSTRALIA, AND EXPAND ROUTES THAT CONNECT OUR REGIONS, MAKING IT EASIER FOR VISITORS TO GET HERE, AND EXPERIENCE ALL OF WESTERN AUSTRALIA.

TO MAKE IT EASIER TO INVEST AND BUILD SUSTAINABLE TOURISM INFRASTRUCTURE, ATTRACTIONS AND EXPERIENCES THAT ENCOURAGE VISITORS TO STAY LONGER, DISPERSE FURTHER AND SPEND MORE.



ACCOMMODATION AND ATTRACTIONS

Western Australia has unique and otherworldly natural assets, which are major drawcards for visitors from all markets. However, in many cases, to activate economic outcomes requires improved access infrastructure, a greater choice of accommodation options, and an increased number of tourism experiences.

The opportunities for each tourism destination vary, but the common thread is the need for interdependent attractions, accommodation, activities, transport connectivity and service provisions.

Development in these areas is primarily driven by private sector investment, supported by government through timely approvals, licences, leases and with certainty in tenure.

There is a shortage of accommodation in many tourism towns, and emerging destinations are also challenged to meet visitor demand and expectations.

Accommodation is required of all types including student and industry staff, but especially offerings to meet the needs of the high yield traveller.

The WA Government successfully worked with local government in the last decade to create an attractive investment environment that stimulated significant uplift in Perth short-stay accommodation developments.

A review of government policies around land availability and approvals will stimulate more interest from private sector investors around the state.

New tourism offerings are also important, with Western Australia uniquely placed to deliver world-class offerings around dark sky tourism, wellness, agritourism, road trips and other nature-based tourism activities. These growth areas, alongside Aboriginal tourism, will provide the visitor with the immersive experiences they are seeking.

Additionally, Tourism WA has developed a Western Australian Cruise Tourism Strategic Plan 2023-2033, with the ambitious target of growing the volume and economic impact of cruises along Western Australia's 20,000 km of mainland and island coastline, ensuring that opportunities around shore excursions are recognised and optimised.

MEASURING SUCCESS

- Overall spend growth in the regions
- Infrastructure delivery through the Tourism Investment Monitor (TRA) in comparison to other Australian jurisdictions
- Room capacity expansion via independent hotel aggregator

INITIATIVES

1. Attract Private Sector Investment

Secure private sector investment in the tourism industry by establishing a more attractive and streamlined environment.

2. Accommodation Development

Increase short-stay visitor accommodation in high-priority destinations.

3. Experiences in Protected Areas[^]

Support sustainable and unique accommodation offerings, attractions and experiences in and around Protected Areas.

4. Attraction and Experience Development

Create new attractions and build the density and diversity of tourism experiences to exceed visitor demand.

5. Cruise Tourism

Grow Western Australia's market share of the Australian cruise tourism sector and be recognised as Australia's premier sustainable expedition cruise destination.

6. Road Access

Accelerate road trip visitation and optimise tourism outcomes through improved road connectivity.

Appendix 1: outlines the Initiatives in detail.

[^] Protected Areas includes National Parks, Conservation Parks, Marine Parks, Reserves, Indigenous Protected Areas and World Heritage Sites.

EVENTS

A key focus of the 10-year strategy is developing, attracting and promoting events.

Events contribute significantly to the liveability of the state, providing both West Australians and out-of-state visitors with premium, iconic experiences and reasons to explore and extend their stay. Events add vibrancy, promote Western Australia, generate local jobs, and deliver customers to local tourism and hospitality operators, including hotels, restaurants, bars and attractions.

Tourism WA, in conjunction with its partners, aims to deliver a diverse calendar of metropolitan and regional events each year to showcase Western Australia as an 'always-on' destination - with major sporting, arts, cultural, entertainment, community and business events. This includes destination events that showcase our natural environment, our vast dark skies and the Indian Ocean; our premium food and wine; and First Nations people and cultures.

A regional focus will ensure events are dispersed throughout Western Australia, to encourage more time-bound visitation from out-of-region and smooth out seasonality in employment and capacity.

Further, Tourism WA is supporting a series of uniquely West Australian homegrown events.

These initiatives form part of Tourism WA's Vision for Dream Events, which is, 'For Perth and

Western Australia to be the fastest growing events destination in the South East Asian region'.

This Vision will be underpinned by securing major blockbuster events that include exclusive content, and bidding for national and international championships including World Cup tournaments.

As it is a highly-competitive sector both interstate and internationally, the growth of Western Australia's events agenda over the long-term requires world-class, contemporary infrastructure from a sports, arts, culture and business perspective.

The opening of Optus Stadium (Perth Stadium) in 2018 demonstrated what a world-class venue could achieve by way of attracting and hosting major events to the state.

New and improved infrastructure also enables intrastate participation and provides facilities for future generations to enjoy.

Through delivery of the Vision for Dream Events, the aim is to engage the West Australian community by hosting a variety of events and authentic experiences that will create a dynamism and sense of belonging in Perth and throughout Western Australia's regions, making the state an even better place to live, work and visit.

MEASURING SUCCESS

- Number of out-of-state visitors who come to Western Australia for an event, their length of stay and spend
- Visitor metric comparison to other Australian jurisdictions

INITIATIVES

1. Events Infrastructure

Support world-class infrastructure to attract and grow visitation to wondrous events.

2. Leisure, Sports and Cultural Events

Secure and deliver diverse events that forge Western Australia's reputation as an always-on, year-round events destination which secures and hosts exclusive content.


3. Regional, Destination and Community Events

Showcase the regions and the natural beauty of Western Australia to visitors and community.

4. Business Events

Grow a sustainable business tourism sector, and develop Perth's status as an economic powerhouse in the South East Asian region.

Appendix 1: outlines the Initiatives in detail.



FOR PERTH AND WESTERN AUSTRALIA TO BE THE FASTEST GROWING EVENTS DESTINATION IN THE SOUTH EAST ASIAN REGION.

KINGS PARK AND BOTANIC GARDEN, PERTH | KAARTA KOOMBA

FOR WESTERN AUSTRALIA TO BE THE
PREMIER STATE FOR ABORIGINAL
TOURISM IN AUSTRALIA.

ABORIGINAL TOURISM

Western Australia is a state rich in diversity of Aboriginal cultures, and tourism is an ideal way to celebrate, engage, honour and ensure these oldest living cultures continue to thrive.

The benefits of Aboriginal tourism go far beyond financial value and giving the state a tourism brand. They include tangible and lasting differences to individuals, families and communities, ongoing connection to Country, and sharing of culture and historical awareness.

Increased tourism opportunities provide rewarding employment throughout Western Australia, supporting Aboriginal families to remain on Country.

Tourism is an industry where skills gained are transferable to future employment, and where industry champions are created, who become role models to inspire youth.

Creating and sharing authentic cultural experiences with West Australians and visitors to the state, preserves the history and recognises the importance of our cultural heritage. This is through sharing of knowledge, through stories and creating connections with the land in the form of food, exploration, understanding and education.

A significant milestone has been achieved to date with the Jina: Western Australian Aboriginal Tourism Action Plan 2021-2025 (Jina Plan) - an agreed approach to align, collaborate and communicate cross-agency activities aimed at growing a diversified and sustainable Aboriginal tourism sector for Western Australia.

The Jina Plan is a partnership between Tourism WA, Western Australian Indigenous Tourism Operators Council (WAITOC) and eight WA Government departments.

WAITOC is a peak industry body that provides leadership to the Aboriginal tourism sector and works in partnership with government in the implementation of initiatives to grow a sustainable Indigenous tourism industry.

The continuation of the successes, values and pillars of the Jina Plan beyond 2025 will remain a key focus of WAVES 2033 to underpin the long-term aim of providing visitors with an enriching, authentic cultural experience that is available nowhere else in the world.

MEASURING SUCCESS

- Aspiration to be the premier state for Aboriginal tourism in Australia to be measured via NVS and IVS surveys
- Measures will be created relating to the number of Aboriginal Experiences undertaken, relative to total visitors

INITIATIVES

1. Position Western Australia as an Authentic Aboriginal Cultural Destination

Increase the awareness and access to the state's suite of cultural experiences.

2. Aboriginal Peoples' Participation in Tourism

Build the capacity for Aboriginal people to enter the tourism sector.

3. Aboriginal Tourism Experiences

Facilitate the development of authentic Aboriginal cultural experiences.

4. Aboriginal Cultural Centres

To support and develop Cultural Centres to showcase Aboriginal cultures.

Appendix 1: outlines the Initiatives in detail.

DESTINATION BRAND

Western Australia is a destination which requires considerable thought, pre-planning, time and expenditure. For these reasons, visitors who are most likely to stay longer, disperse more widely and spend more on quality experiences – high yield travellers – are an ideal target audience.

WAVES 2033 outlines the importance of appealing to visitors who seek and value authentic unique experiences, and wish to immerse themselves in the high-quality, natural and adventurous encounters that abound across our landscape.

This 'quality over quantity', 'value over volume' approach is also a key pillar for sustainability across the sector - to protect our natural assets and way of life through targeted and engaged visitor groups from diverse market segments.

To position Western Australia relative to interstate and international competitor destinations, it is imperative that actions promptly capitalise on the travel momentum stimulated post COVID-19.

Targeted, innovative campaigns with broad appeal and varied product will be the cornerstone of staying 'front of mind' with visitors and ahead of competitor destinations.

This work has commenced and will be expanded upon over the decade via the Walking On A Dream brand for Western Australia, launched globally in 2022, inspired by Western Australia's ancient Aboriginal culture, and designed to appeal to a global audience.

Walking On A Dream encourages visitors to embrace time, space, connection and freedom,

and to seek experiences beyond the expected.

This brand belongs to all businesses and tourism operators in Western Australia and creates an inspiring and unifying identity that will attract high yield travellers in the future.

From this brand platform, activity to strengthen consumer demand will be amplified and Tourism WA will continue to identify priority markets across geographies and traveller types, including business and international students. While the international market provides the greatest opportunity for a step-change in growth -the domestic market (which includes interstate and intrastate overnight trips and daytrips) remains high in importance, generating over 80 per cent of visitor expenditure.

MEASURING SUCCESS

- Volume of international/interstate visitors
- Spend per trip in Western Australia
- Market share by visitor segment (IVS)

INITIATIVES

1. Consumer Demand

Grow consumer demand through effective and innovative marketing practices.

2. Global Positioning

Grow and amplify our tourism product in global trade distribution channels.

3. Brand Partnerships

Engage congruous global partnerships to strengthen brand differentiation.

4. Digital WA Experience

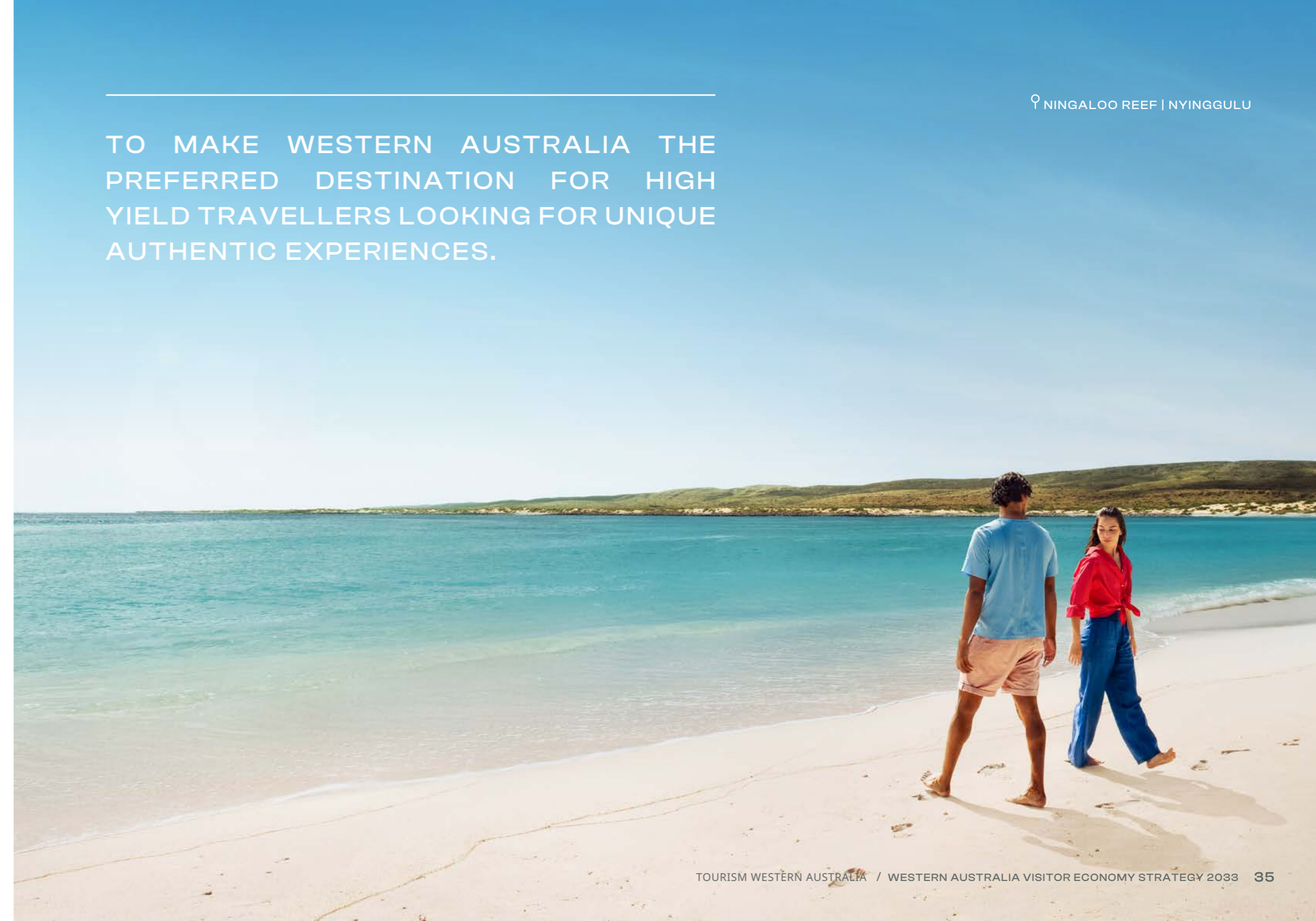
Optimise the digital experience across consumer pathways to enable greater engagement and conversion outcomes.

5. International Students

Leverage international student attraction strategies to maximise visitation outcomes.

Appendix 1: outlines the Initiatives in detail.

TO MAKE WESTERN AUSTRALIA THE
PREFERRED DESTINATION FOR HIGH
YIELD TRAVELLERS LOOKING FOR UNIQUE
AUTHENTIC EXPERIENCES.





BUILD THE CAPABILITIES NEEDED TO DELIVER OPTIMAL SERVICES TO VISITORS AND EXCEED THE EXPECTATIONS OF WORLDLY TRAVELLERS.

HIGH PERFORMING INDUSTRY

In order to achieve a step change and long-term success, it is necessary to maintain a focus on the underlying enabling factors that will strengthen the foundation from which the visitor economy will grow. These include workforce, service levels, sustainability practices and technology, as well as policy development and insights generation. Advancements in these areas will not only improve tourism outcomes for operators and visitors, but also contribute to improved social outcomes for communities, helping to elevate the recognition of the value of the tourism industry.

In the short term, the sector must address the critical challenge of workforce shortages, particularly in the regions. The lasting impact of the pandemic, plus the seasonality and transitory nature of workers in tourism and hospitality has left businesses without the ability to either trade at capacity or deliver the level of services that are expected.

Workforce mobility is an important element of the solution, and we will seek to encourage workers to move between northern and southern peak periods, aided by the utilisation of working holiday makers and international students.

Recognition of the importance of the sector, and the value of tourism across government and other adjacent industries, will also support the creation of genuine career pathways to provide the depth and quality of employment opportunities over the long-term.

This will encourage hospitality and tourism professionals to remain in Western Australia and provide certainty to businesses in terms of quality employees with superior skill sets.

The multiplier effect of the value of tourism is having West Australians and industry as ambassadors for the state, promoting the incredible place it is to live, work, play and study.

While the services sector is reliant on people and their hospitality, a key plank in staying competitive is to embrace and ride the revolution in terms of data, technology, and innovative advancements. Investing in these areas is important to stay on top of research and insights which will inform and assist with servicing visitors and providing them with exceptional and seamless experiences in Western Australia.

More than ever, achievement of these outcomes is reliant on increased alignment between the Commonwealth and State Governments - as complex national policy issues affecting international visitation are navigated.

Additionally, this cross-government alignment can facilitate positive change by way of the sharing of developments and research in areas such as sustainability, visitation data and traveller preferences.

Ongoing and improved collaboration across government and industry is necessary to remove barriers, modernise ways of working, increase capabilities, and improve the way operators connect with consumers.

MEASURING SUCCESS

- Visitor Net Promotor Score
- Growth in Tourism Filled Jobs
- Tourism Filled Jobs in comparison to other Australian jurisdictions

INITIATIVES

1. Value of the Visitor Economy

Maximise alignment and awareness of tourism and the value of the visitor economy to Western Australia.

2. Workforce Attraction and Retention

Develop and grow a skilled tourism and hospitality workforce delivering service excellence.

3. Sustainable and Inclusive Industry

Ensure Western Australia's tourism industry has a strong focus on sustainability and inclusivity.

4. Intergovernmental Policy

Optimise policies to facilitate growth in the visitor economy.

5. Innovative Technologies & Intelligence

Embrace innovative technologies and data to empower industry and government to enhance productivity.

6. Visitor Servicing

Provide an engaging, welcoming and informative experience for visitors across all touchpoints.

Appendix 1: outlines the Initiatives in detail.

MEASURING AND MONITORING

A series of measures have been created to assess the success of WAVES 2033, and interim milestones have been created to chart the journey to 2033.

Actual results for these measures will be reported on an annual basis, alongside progress on activities, and milestones reached.

Tourism WA will also track local and global trends that will impact the delivery of WAVES 2033 outcomes and propose changes to WAVES 2033 in alignment with each horizon, and to achieve the goal of \$25 billion visitor spend.

A SERIES OF MEASURES HAVE BEEN CREATED TO ASSESS THE SUCCESS OF WAVES 2033, AND INTERIM MILESTONES HAVE BEEN CREATED TO CHART THE JOURNEY TO 2033.

APPENDIX: INITIATIVES

AVIATION

#	DESCRIPTION	ACTIVITIES
1.1	Airport Infrastructure Support the delivery of fit-for-purpose state airport infrastructure and resources to enable increased international arrivals	1.1.1 Support infrastructure and associated resources at metropolitan and regional airports to meet long term growth demands for visitors
		1.1.2 Investigate and identify international and interstate aviation gateways directly into regional Western Australia
		1.1.3 Identify the priority for upgrades of key regional airports and airstrips to facilitate the growth of regional routes
1.2	Airline Route Development Work in partnership with industry to attract new inbound aviation routes and to build capacity on existing routes	1.2.1 Recover and grow the state's aviation network into and around Western Australia, securing more direct routes into the state and upscaling existing frequency and capacity
		1.2.2 Work in partnership with Perth Airport and regional airports to develop and deliver on aviation business development strategies to secure and grow aviation to priority markets
		1.2.3 Position Perth as Australia's Western Gateway, lifting the profile of the destination within the industry
1.3	Aviation and Marketing Partnerships Stimulate consumer demand via cooperative marketing partnerships to support the viability and growth of existing routes	1.3.1 Work in partnership with key airline partners to develop and deliver on cooperative marketing activities that drive interstate or international visitation to support the growth of international and domestic capacity into the state
1.4	Regional Visitation and Affordability Support visitation to the regions through the delivery of collaborative and innovative approaches to facilitate lower regional airfares	1.4.1 Ensure affordable fares are available for leisure visitors travelling to key regional tourism destinations which are a significant distance from Perth (>5hrs)
		1.4.2 Work with key airline partners to encourage regional visitation via cooperative marketing activities, processes and partnerships
1.5	Aviation Connectivity Improve aviation connectivity into and around Western Australia	1.5.1 Development and delivery of strategic international and interstate aviation growth plans for Western Australia in conjunction with key partners
		1.5.2 Investigate and identify opportunities for growth and development of regional aviation connectivity across Western Australia

ACCOMMODATION AND ATTRACTIONS

#	DESCRIPTION	ACTIVITIES
2.1	Attract Private Sector Investment Secure private sector investment in the tourism industry by establishing a more attractive and streamlined environment	2.1.1 Work with the public and private sectors to identify and activate state land for sustainable and responsible tourism development 2.1.2 Create an attractive environment for private sector investment through effective policy and timely provision of leases and licences with appropriate tenure, to encourage investment in tourism infrastructure and experiences 2.1.3 Assist, facilitate and actively support private sector investment in key tourism destinations
2.2	Accommodation Development Increase short-stay visitor accommodation in high-priority destinations	2.2.1 Identify appropriate access to land and policy levers to encourage private sector investment in short-stay accommodation in high priority locations to meet visitor demand 2.2.2 Implement a framework for regulating short-term rental accommodation throughout the state, balancing objectives of industry supply, consistency of product and consumer choice
2.3	Experiences in Protected Areas[^] Support sustainable and unique accommodation offerings, attractions and experiences in and around Protected Areas	2.3.1 Support the establishment of signature, unique, premium accommodation offerings that contribute to the conservation of key natural and cultural values in Protected Areas 2.3.2 Support the establishment of commercial tourism offerings in Protected Areas that build the density and diversity of the visitor experience 2.3.3 Work across government to build the inventory of public-funded, iconic attractions in Protected Areas
2.4	Attraction and Experience Development Create new attractions and build the density and diversity of tourism experiences to exceed visitor demand	2.4.1 Support the delivery of tourism projects of state significance delivered through public and private sector investment, including attractions in Perth and surrounds 2.4.2 Revitalise public sector major attraction assets to ensure their sustainability and evolution to meet the needs of visitors, including in Protected Areas 2.4.3 Create new private and public sector experiences that showcase the best of Western Australia 2.4.4 Identify precinct activation initiatives for priority destinations that will drive visitor demand
2.5	Cruise Tourism Grow Western Australia's market share of the Australian cruise tourism sector and be recognised as Australia's premier sustainable expedition cruise destination	2.5.1 Implement the Western Australian Cruise Tourism Strategic Plan 2023-2033 to deliver cruise line attraction initiatives to position and market Western Australia as an attractive and sustainable cruise destination 2.5.2 Promote pre and post cruise stays in turnaround ports to optimise the length of stay and dispersal of cruise visitors in Western Australia 2.5.3 Support each cruise destination to create the most optimal shoreside experiences for cruise passengers in a sustainable manner 2.5.4 Deliver efficient and safe port marine infrastructure and services that meet the needs of the cruise sector
2.6	Road Access Accelerate road trip visitation and optimise tourism outcomes through improved road connectivity	2.6.1 Support the development of tourism opportunities that the sealing of the Outback Highway and Tanami Road will create by providing new road connectivity from Australia's East Coast 2.6.2 Support the development of the tourism outcomes from the sealing of the Manuwarra Red Dog Highway that provides improved visitor connectivity between Pilbara National Parks 2.6.3 Advocate for enhancement to priority tourism roads to improve connectivity and visitor safety 2.6.4 Facilitate infrastructure to support a sustainable electric road transport network for visitors

EVENTS

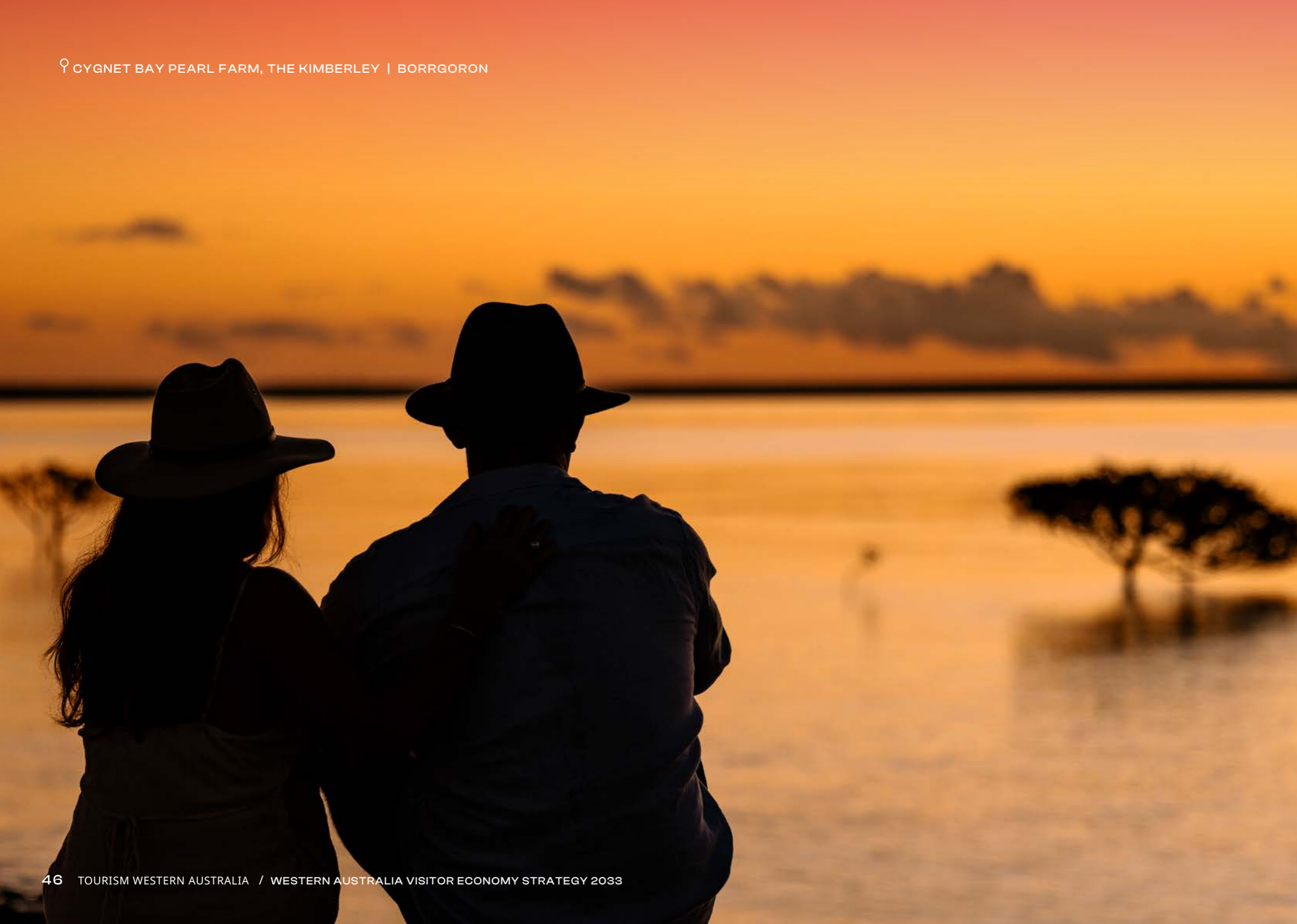
#	DESCRIPTION	ACTIVITIES
3.1	Events Infrastructure Support world-class infrastructure to attract and grow visitation to wonderful events	3.1.1 Support new world-class event infrastructure including cultural, entertainment and activation precincts 3.1.2 Support world-class sporting infrastructure including elite training and high-performance facilities for mass participation events, and to attract high profile sporting events, teams and athletes to Western Australia 3.1.3 Support the enhancement of business event infrastructure to attract globally-competitive business events
3.2	Leisure, Sports and Cultural Events Secure and deliver diverse events that forge Western Australia's reputation as an 'always-on', year-round events destination which secures and hosts exclusive content	3.2.1 Secure multiple major blockbuster events each year, with a focus on Australian-exclusive content that activates large scale state infrastructure and venues and attracts significant out-of-state visitation for longer stays and regional dispersal 3.2.2 Continue to secure international and national championships across the state each year to leverage mass participation events with a national and international footprint and leave a lasting social legacy 3.2.3 To increase global awareness of the state's premium culinary offering by showcasing Western Australian food and wine through unique events and grow the state's position as Australia's leading premium food and wine event destination 3.2.4 Develop and grow the suite of cultural events and global recognition of homegrown events, including EverNow, designed to embrace and celebrate First Nations people 3.2.5 Promote Western Australia as an 'always-on' events destination by launching a long-term Events campaign targeting interstate and international visitors
3.3	Regional, Destination and Community Events Showcase the regions and natural beauty of Western Australia to visitors and community	3.3.1 Engage the West Australian community by securing a variety of iconic events and experiences that create vibrancy, generate a sense of pride and provide opportunities for locals, including jobs creation 3.3.2 Develop and support 'hero' events that embrace the natural landscape as a platform to showcase the state's unique attributes to the world, including vast dark skies, trails and connection to the Indian Ocean 3.3.3 Develop and grow the volume of regional events that increase visitation and awareness of host regions, particularly in off-peak periods, and generate strong community engagement and participation
3.4	Business Events Grow a sustainable business tourism sector, and develop Perth's status as an economic powerhouse in the South East Asian region	3.4.1 Develop and execute a business events strategy in partnership with Business Events Perth (BE Perth) to leverage tourism and economic outcomes

ABORIGINAL TOURISM

#	DESCRIPTION	ACTIVITIES
4.1	Position Western Australia as an Authentic Aboriginal Cultural Destination	4.1.1 Promote the state's extraordinary, authentic Aboriginal cultural tourism experiences and create a uniquely Western Australian cultural welcome for visitors
	Increase the awareness and access to the state's suite of cultural experiences	4.1.2 Create and support the growth of Aboriginal events that encourage visitors to disperse into the regions
4.2	Aboriginal Peoples' Participation in Tourism	4.2.1 Engage with Aboriginal people to upskill and connect to employers for job opportunities
	Build the capacity for Aboriginal people to enter the tourism sector	4.2.2 Support new and existing businesses through capacity building and business development programs
		4.2.3 Support Aboriginal Corporations, communities and people to articulate, plan for, and achieve their tourism aspirations for Country
4.3	Aboriginal Tourism Experiences	4.3.1 Expand the Camping with Custodians Program and grow the collective into new areas, for example, Art with Custodians, Cruise with Custodians, and Walk with Custodians
	Facilitate the development of authentic Aboriginal cultural experiences	4.3.2 Create opportunities for Aboriginal people to establish cultural tourism experiences within Protected Areas
		4.3.3 Integrate Aboriginal tourism experiences as an essential part of the mainstream tourism industry
4.4	Aboriginal Cultural Centres	4.4.1 Develop an Aboriginal Cultural Centre in Perth to celebrate and showcase Western Australia's unique Aboriginal cultures
	To support and develop Cultural Centres to showcase Aboriginal cultures	4.4.2 Support the development of Cultural Centres in priority regional destinations and support existing Centres to grow sustainably

DESTINATION BRAND

#	DESCRIPTION	ACTIVITIES
5.1	Consumer Demand	5.1.1 Use insights and data to inform and position Western Australia as a challenger brand within global markets
	Grow consumer demand through effective and innovative marketing practices	5.1.2 Evolve and extend the Walking On A Dream global tourism brand for use in global and domestic marketing activities
		5.1.3 Strategically focus on international priority markets executing activities that raise destination awareness and generate bookings through key distribution partners
		5.1.4 Identify emerging markets to diversify and grow future inbound visitation from, by increasing awareness and consideration for Western Australia
5.2	Global Positioning	5.2.1 Deliver destination training and education programs to global trade and enhance engagement and communication
	Grow and amplify our tourism product in global trade distribution channels	5.2.2 Support operators to become export-ready and connect them with global distribution channels
		5.2.3 Lead and support annual operator missions into key markets with a focus on delivering commercial outcomes
		5.2.4 Increase opportunities for industry to connect globally by hosting international travel trade events in Western Australia
5.3	Brand Partnerships	5.3.1 Deliver innovative long-term, brand, media and advocacy partnerships, targeting high yield travellers and positioning Western Australia as a premium brand
5.4	Digital WA Experience	5.4.1 Develop digital solutions that are modern, scalable and adaptable, to connect visitors with experiences and industry with visitors, driving conversion and bookings
	Optimise the digital experience across consumer pathways to enable greater engagement and conversion outcomes	5.4.2 Deliver technology and data solutions to comply with international data regulation
		5.4.3 Leverage data to improve understanding of traveller behavior and visitor segmentation to increase leads, product sophistication and offerings
5.5	International Students	5.5.1 Leverage international student attraction strategies to maximise visitation outcomes
	Attraction Strategies	



HIGH PERFORMING INDUSTRY

#	DESCRIPTION	ACTIVITIES
6.1	Value of the Visitor Economy Maximise alignment and awareness of tourism and the value of the visitor economy to Western Australia	6.1.1 Demonstrate the value of the visitor economy to complement government priorities
		6.1.2 Educate agencies on the shared responsibility, opportunity and benefits of the visitor economy
		6.1.3 Maximise opportunities to align activities, contracts and projects to this strategy
		6.1.4 Identify adjacent sectors and industries to create opportunities to collaborate across the visitor economy
6.2	Workforce Attraction and Retention Develop and grow a skilled tourism and hospitality workforce delivering service excellence	6.2.1 Focus on the short-term and long-term visitor economy workforce needs, addressing the volume and depth of skills required for a sustainable industry
		6.2.2 Elevate tourism and hospitality as a career of choice, supporting a strong pipeline of local talent and facilitating a world-class education pathway in Western Australia
		6.2.3 Capitalise on the working holiday maker and international student cohorts as key industry workforce resources
		6.2.4 Ensure the state's policy and position encourages skilled and semi-skilled migration opportunities for the visitor economy
6.3	Sustainable and Inclusive Industry Ensure Western Australia's tourism industry has a strong focus on sustainability and inclusivity	6.3.1 Embrace and promote sustainable and regenerative practices for the Western Australia tourism industry
		6.3.2 Focus the industry on inclusive and accessible awareness and the evolving needs of diverse visitor groups, increasing understanding, product and offerings for all visitors to Western Australia
6.4	Intergovernmental Policy Optimise policies to facilitate growth in the visitor economy	6.4.1 Work with the Commonwealth Government on matters which will assist delivery of WAVES 2033 (for example, THRIVE 2030 developments, aviation, insurance, infrastructure, border control, visas, skilled migration, employment conditions)
		6.4.2 Work across all levels of government to identify and optimise policies for visitor economy development
6.5	Innovative Technologies and Intelligence Embrace innovative technologies and data to empower industry and government to enhance productivity	6.5.1 Guide, educate and support industry to improve their digital competency, product design and experience delivery through innovative technology
		6.5.2 Effectively coordinate data collection and analysis across Western Australian government departments
		6.5.3 Enhance accessibility and understanding of research and information
		6.5.4 Provide accurate, relevant and concise research insights to inform business, industry and government decisions
6.6	Visitor Servicing Provide an engaging, welcoming and informative experience for visitors across all touchpoints	6.6.1 Enhance customer service to exceed expectations and create a memorable experience for visitors
		6.6.2 Provide a world-class environment for welcoming visitors where they are able to access information in an engaging manner
		6.6.3 Build a Welcome Centre that embodies Western Australia's destination brand, celebrates our rich culture and heritage, and encourages visitors to learn and explore Western Australia

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