Local Government and Tourism
Discussion Paper

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1 Executive Summary

Tourism is forecast to double in size by 2030 as one of the fastest growing economies in the world – Australia included.[1] It is a key economic driver at national, state, territory and local levels throughout Australia and the outlook is very promising. Tourism stakeholders must plan effectively now and be ready to adapt to change to leverage the opportunities that are said to arise.

Local Government is at the forefront of tourism delivery and in many ways the linchpin to other spheres of government, industry and the community. It provides an expanse of tourism infrastructure, from roads, to airports, caravan camping grounds, visitor centres and parks just to name a few. Local Government in a tourism setting is governed by legislation from the Commonwealth and State, from land-use planning through to environmental and health legislation; it is impacted by national and State tourism strategies, as well as other government strategies, and participates in, and contributes to the activities of tourism organisations and networks. Industry that supports tourism - accommodation, retail, restaurants, bars and cafes, all have reciprocal relationships with, and of course exist within Local Government jurisdictions.

As a State, Western Australia is abundant in natural attractions with a climate conducive to tourism activity; there is a lot to celebrate. To make the most of its potential, managing the challenges in the dynamic context in which tourism exists is imperative. This can only happen with true collaboration between all spheres of government, industry, stakeholders and the community – a sentiment mentioned very often and much less often followed through. It takes planning, time and dedication towards a common purpose.

WA Local Governments are diverse in their interests, needs and support requirements, which is a reflection of their geographical location, economic drivers, industry, resources, capacity and interests. This is particularly marked when acknowledging tourism – its impact and Local Government involvement varies dramatically. For some Local Governments tourism may take on the form of a whole raft of infrastructure, events and activities, while other Councils may provide signage and Wi-Fi stops as gateways to other destinations. In many ways it is about working with what already exists, and matching tourism development to Local Government viability.

Local Governments exist as their own entities. In a tourism context however it is necessary to look at the bigger picture and each Local Government to take on the view as part of a journey or network, what is surrounding, how each is impacted and how it will impact others.

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[1] Haeberlin Consulting (2014). The future of visitor centres in WA

This paper identifies the context of tourism for Local Government, its current roles and future roles determined by Local Government feedback, with the backdrop of evidence from the economy, Commonwealth and State Government agencies, their strategies and activities as well as other stakeholders.

This report's recommendations bring together Local Government feedback and with the economic backdrop and frameworks of Commonwealth and State Governments. They aim to support and provide guidance in Local Governments' strategic and operational planning and delivery in tourism as well as acknowledging the position of those Local Governments that are not in the position to develop tourism by offering some considerations for the future.

WALGA has assessed the needs of member Local Governments while considering the scope in which tourism operates. Through WALGA's consultation process, Tourism WA has formally indicated support for WALGA's initiative and is interested in working collaboratively with WALGA and Local Governments. The recommendations of this paper are:

1. WALGA to work with Tourism Western Australia specifically to:

   a. develop a Local Government Tourism Strategy to deliver local tourism outcomes
   b. investigate the development of resources including a destination marketing management toolkit
   c. investigate tourism education and training options for Local Government
   d. improve current Local Government tourism data collection including visitor numbers, visitor activities and marketing
   e. identify funding opportunities for metropolitan and urban growth corridors to deliver tourism outcomes.

2. WALGA to work with the nine Regional Development Commissions to:

   a. Advocate to the Minister for Regional Development for funding to implement the Regional Development Commission Investment Blueprints
   b. Undertake a desktop audit of tourism organisations within respective Development Commissions to facilitate better strategic planning between tourism organisations and Local Government.
   c. Establish a centralised and coordinated network of tourism organisations

3. WALGA President to consider establishing a Policy Forum on Tourism, to allow the Association and Local Governments to identify, consider and respond to commonly shared issues relating to tourism development, decision making and infrastructure investment.

2   Introduction

2.1   Background

In 2014 the WALGA President and Executive Team visited regional Local Governments and met with Elected Members, Chief Executive Officers and senior staff to discuss WALGA's existing policy and advocacy activities and identify future strategic and operational priorities in the regions. Many Local Government participants commented on the need to better define Local Government's role in tourism and raised common concerns associated with visitor centres.

In addition, WALGA's research into Local Government strategic plans identified that members value tourism as a means of economic development. Strategic plans featured tourism as the most prevalent theme within the category of economic development, with 64% of Local Governments identifying tourism as a portfolio for development.

Given these foundations, WALGA further pursued Local Governments' interest in tourism. In February 2015, WALGA distributed a survey to all member Local Governments requesting feedback on Local Governments' current positioning in the tourism industry, with the intention of developing and informing this paper with recommendations on future Local Government and WALGA roles in tourism.

2.2   Structure of this report

This report comprises three key sections. The first section defines tourism and the tourism industry in national, State and local contexts. It provides an overview of current Commonwealth and State tourism frameworks and government agency responsibilities and the roles of Local Government.

The second section presents Local Government feedback received by WALGA and examines the opportunities and challenges encountered by Local Government in developing tourism.

Using sections one and two as a backdrop and evidence base, the third section presents recommendations for future Local Government and WALGA roles.

2.3   What is tourism?

Tourism definitions within government and industry are varied due to tourism's economic complexity. In this paper, tourism and its associated terms are defined according to the United Nations World Tourism Organisation (UNWTO) and are also used by Tourism Australia, Tourism Western Australia and the ABS.

The UNWTO defines tourism as:

"A social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.

These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure." [2]

The WTO defines a visitor as:

"a traveller taking a *trip* to a main destination outside his/her *usual environment*, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A *visitor* (*domestic, inbound* or *outbound*) is classified as a *tourist* (or overnight *visitor*), if his/her *trip* includes an overnight stay, or as a same-day *visitor* (or excursionist) otherwise."[3]

International visitors travel to a country other than that in which they have their usual place of residence. Domestic visitors are Australian residents who travel outside their usual environment, whether for an overnight stay or a day trip. Visitors can be further defined in terms of their purpose of travel, and further still by their particular interests.

Unique to other industries, and as implied by the above definitions, tourism is defined in terms of consumer activity rather than supplier activity.[4]

This means that a product or service is considered as tourism consumption depending on the consumer. Tourism is sometimes referred to as "visitor economy" to capture all tourism activities across its broad spectrum of involvement.[5]

The impact of tourism is far reaching, and interfaces with all spheres of government and many industries. To understand tourism holistically it is imperative to consider:

- the economy on national, State and local levels
- all spheres of government
- natural and built environments
- local populations and tourists
- the broad spectrum of suppliers and producers involved directly and indirectly in the industry

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[2] United Nations World Tourism Organisation http://media.unwto.org/en/content/understanding-tourism-basic-glossary Viewed 08/01/2015
[3] United Nations World Tourism Organisation http://media.unwto.org/en/content/understanding-tourism-basic-glossary Viewed 08/01/2015
[4] Australian Bureau of Statistics http://www.abs.gov.au/ausstats/abs@.nsf/0/5AA223EA8A78A311CA25697E0018FBFF?opendocument Viewed 08/01/2015
[5] Productivity Commission (2015) Australia's International Tourism Industry Productivity Commission Research Paper 2015

Importantly, the policy decisions made by the Commonwealth, State Local Governments in planning, management and monitoring must account for all of these factors.[6]

The ABS defines tourism industries as tourism characteristic or tourism connected, both of which must provide goods or services directly to a visitor. A tourism characteristic industry possesses greater than 25% of its output for tourists, for example the accommodation industry. A tourism connected industry provides less than 25% of its output, for example the retail industry[7]. This may assist Local Governments in understanding industry activity and networks both within and outside their jurisdictions.

3   Commonwealth and State Government roles in Tourism

The key Australian Commonwealth and State agencies operating under legislation in the tourism industry are shown in Figure 1 – Federal and State Government responsibilities. They provide the governance framework in which tourism operates.

Figure 1- Federal and State Government responsibilities

	Department/Agency	Responsibilities
Commonwealth	Austrade	National tourism policy, planning and research. It also includes Tourism Research Australia (TRA)
	Tourism Australia	International marketing of Australian tourism, reporting to the Minister for Trade and Investment.
State	Tourism Western Australia	Promotion of Western Australia including events to attract more visitors.

3.1   Austrade

Austrade was established by the *Australian Trade Commission Act 1985*. It is a prescribed agency subject to the *Financial Management and Accountability Act 1997* and the *Public Service Act 1999* and is part of the Foreign Affairs and Trade portfolio. [8]

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[6] United Nations World Tourism Organisation http://media.unwto.org/en/content/understanding-tourism-basic-glossary Viewed 08/01/2015
[7] Productivity Commission (2015) Australia's International Tourism Industry Productivity Commission Research Paper 2015
[8] Austrade Annual Report 13-14

In 2013, responsibility for tourism policy, programmes and research was transferred to Austrade from the former Department of Resources, Energy and Tourism. Austrade now works on Australia's tourism industry and implementing the National Long-term Tourism Strategy, Tourism 2020.

In addition to this, Austrade also assists Australian businesses, education institutions, governments and communities as they develop international markets, win foreign direct investment, promote international education, or seek consular and passport services in certain locations overseas. [9]

3.1.1 Tourism Research Australia

Tourism Research Australia is an administrative branch within the Tourism Division of Austrade but professionally independent in its public positioning. Its research and analysis provides statistical and economic information to inform both government and industry. [10]

3.2 Tourism Australia

Tourism Australia is an Australian Government Statutory Authority established under the Tourism Act Australia 2004. Its Board of Directors reports to the Australian Tourism Minister for Trade and Investment, the Tourism Act 2004 and the Commonwealth Authorities and Companies Act 1997.

Under the *Tourism Australia Act 2004*, Tourism Australia's main functions are to:

- Increase potential travellers awareness of Australia as a destination
- Increase potential domestic travellers' awareness of Australia as a place to travel
- Increase both international and domestic potential travellers' knowledge of Australia
- Increase both international and domestic potential travellers' desire to travel to and throughout Australia
- Conduct research into, and analysis of, international and domestic travel
- Communicate effectively with the Australian tourism industry on relevant issues
- Increase awareness about the contribution of tourism to Australia's economy, society and
- environment throughout Australia
- Report international trends[11]

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organisation's activities include advertising, PR and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research. Tourism Australia is funded by the Australian Government, and other sources.

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[9] http://www.austrade.gov.au
[10] Tourism Research Australia http://www.tra.gov.au/aboutus/our-structure.html Viewed 05/05/2015
[11] Tourism Australia Annual Report 2013-14

3.3 Tourism Western Australia

The WA Tourism Commission operates as Tourism Western Australia (Tourism WA) and was established under the Western Australian Tourism Commission Act 1983. Other relevant legislation includes the Financial Management Act 2006, Public Sector Management Act 1994 and the State Supply Commission Act 1991.[12] The Board of Commissioners is responsible for the agency's corporate governance, strategic direction, goals and management. The Board delegates operational activities to the Chief Executive Officer and Executive Management Team.

Under the Act, Tourism WA is required to produce corporate and operational plans and is also responsible for marketing WA as a State. It is first and foremost an economic development agency and focuses on developing, attracting and promoting major sporting, art cultural and business events; and supporting significant tourism infrastructure development.

To achieve this, Tourism WA works in partnership with the private sector, industry and government to develop WA's iconic tourism industry and to promote it locally, nationally and internationally.

4   Other agencies involved in tourism

Some government agencies are not specifically involved in tourism but their activities and policies have a significant impact on tourism.[13] Both Commonwealth and State Government agencies are involved in tourism at different levels, some of which are listed in Figure 2 – Commonwealth and State Government Agencies involved in tourism. The key State agencies are discussed in more detail following.

Figure 2 - Commonwealth and State Government Agencies involved in tourism

Commonwealth Agencies	State Agencies
Department of Immigration and Border Protection	Department of Regional Development
	Regional Development Commissions
Department of Infrastructure and Regional Development	WA Planning Commission
	Department of Planning
Regional Development Australia	Department of Lands
Department of Industry	Department of Parks and Wildlife
Department of Foreign Affairs and Trade	LandCorp
	Small Business Development Corporation
	Department of Local Government and Communities
	Department of the Premier and Cabinet
	Disability Services Commission

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[12] Tourism WA Annual Report 13/14
[13] Productivity Commission (2015) Australia's International Tourism Industry Productivity Commission Research Paper 2015

	Department of Racing, Gaming and Liquor
	Department of Environment Regulation
	Department of Fisheries
	Department of Agriculture and Food
	Department of Training and Workforce Development

4.1 Department of Regional Development

The Department of Regional Development (DRD) administers the State Government's Royalties for Regions and works with the Regional Development Commissions (RDCs), Regional Development Council and the WA Regional Development Trust.

Some Royalties for Regions funds are channelled into economic development, culture and recreation with the aim of building capacity within regional communities.

The department explores new economic development options and creates partnerships with local communities, Regional Development Commissions, government departments and industry to improve the economic and social wellbeing of Aboriginal people.

Royalties for Regions funding

The Royalties for Regions initiative is administered by the Department of Regional Development and provides a range of funding programs some of which are available to Local Government and include:

- Regional grants scheme
- Boarding away from home allowance
- Country age pension fuel card
- Exploration incentive scheme
- Patient assisted travel allowance
- Regional airport development scheme
- Community chest fund[14].

4.2 Regional Development Council

The Regional Development Council was established as part of the Regional Development Commission Act of 1993 and is the advisory body to the WA Government on regional development issues. Under the Council there are nine commissions which are listed below under Regional Development Commissions.

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[14] Department of Regional Development Viewed 03/03/2015

The function of the Council is to be the advisory body to the Minister for Regional Development on all regional development issues and to:

- promote development in the regions
- develop policy proposals on development issues affecting one or more of the regions to facilitate liaison between commissions and relevant government agencies and the coordination of their respective functions to promote liaison between Local, State and Commonwealth government bodies with respect to regional issues, and the coordination of their respective policies on those issues
- report to the Minister on matters referred to it by the Minister

The Regional Development Council meets six times per year and is supported by the Department of Regional Development. [15]

4.3 Regional Development Commissions

Roles of the RDCs are to:

- maximise job creation and improve career opportunities in the regions
- develop and broaden the economic base of the region
- identify infrastructure services needed to promote economic and social development within the region
- provide information and advice to promote business development within the region
- seek to ensure that the general standard of government services and access to those services in the region is comparable to that which applies in the metropolitan area
- encourage, promote, facilitate and monitor the economic development in the region

There are nine regional development commissions in WA which include:

- Gascoyne Development Commissions
- Goldfields Esperance Development Commission
- Great Southern Development Commission
- Kimberley Development Commission
- Mid-West Development Commission
- Peel Development Commission
- Pilbara Development Commission
- South West Development Commission

[15] Department of Regional Development 2015, *Regional Development Council* http://www.drd.wa.gov.au/aboutus/independentpartners/Pages/Regional-Development-Council.aspx

- Wheatbelt Development Commission

Each Local Government belongs to one of these commissions which can be found at www.rdc.wa.gov.au .[16]

Investment Blueprints are being prepared in response to a Government Review during 2010, into the Structure of Regional Development for the Future, known as the '*Duncan Review*'.[17]

Some of these plans have been released and aim to facilitate regional development and investment across the State and align the planning and activities of State Government agencies. They outline development and investment opportunities and bring together the work of stakeholders across the State and address tourism development.

Developed by each of the nine Regional Development Commissions, the Blueprints are plans for investment, outlining transformative strategies, priority actions and investment opportunities and growth. Every region in WA now has access to a $292 million fund over five years to develop major economic, social and community development projects through their Regional Investment Blueprints.

Through consideration of local issues and conditions the Regional Investment Blueprints will develop strategies to grow the region's economic base through the development of its competitive advantages, workforce and community.

The Blueprints will guide the types of investment and inform the strategic allocation of Royalties for Regions funding into infrastructure and services for regional communities.[18]

4.4   Department of Planning - WA Planning Commission

The strategic vision for planning across WA is set out by the WAPC in the State Planning Strategy, which provides guidance for subordinate planning documents, including Local Governments Local Planning Schemes which are required to be consistent with the State Planning Strategy. Through Local Planning Scheme and local planning policies, Local Governments can manage tourism development by controlling land uses through zonings and also development design.

The WA Planning Commission's State Planning Strategy 2050 outlines the government's key tourism priorities which include:

- hotel development in Perth

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[16] Department of Regional Development
http://www.drd.wa.gov.au/about/Independent%20Partners/Regional%20Development%20Commissions/Pages/default.aspx Viewed 05/03/ 2015
[17] Goldfields Esperance Development Commission http://www.gedc.wa.gov.au/what-we-do/Goldfields-Esperance-Regional-Investment-Blueprint.aspx Viewed 09/04/2015
[18] Department of Regional Development
http://www.drd.wa.gov.au/projects/Economic%20Development/Pages/Regional-Blueprints.aspx
Viewed 28/07/15

- redevelopment and improved aviation access at Perth, Busselton and Broome airports
- regional infrastructure, such as caravan parks
- ecotourism initiatives such as Naturebank
- redevelopment of beach and waterfront precincts, such as Scarborough Beach
- cruise shipping
- improved cultural infrastructure and tourism opportunities such as an Aboriginal Cultural Centre in Perth and the new WA Museum[19]

The Tourism Planning Guidelines were produced in partnership with Tourism WA and released on 10 June 2014.

The guidelines aim to assist in developing the tourism component of a local planning strategy which provides Local Governments with a rationale for determining the future land allocation, planning controls and infrastructure needs for tourism, based on sound planning principles.

Where a local tourism planning strategy has been previously prepared by a Local Government, a summary of the key findings and recommendations should be incorporated into the local planning strategy as per these guidelines.

The objectives of the guidelines are to:

- encourage a consistent approach to planning for tourism across local planning strategies;
- ensure that tourism planning and development is considered at the strategic planning stage, as part of the wider planning context; and
- clarify expectations on the scope and detail required as part of a planning assessment, to enable considered planning decision making around tourism uses at the State, regional and local levels.[20]

Planning Bulletin 83 sets out the policy position of the Western Australian Planning Commission on Tourism Development within the State and guides decision-making by the WAPC and local government on subdivision, development and scheme amendment proposals for tourism purposes.

This policy position provides a more strategic and flexible approach to tourism planning to encourage and support investment in the industry.

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[19] WA Planning Commission (2014) State Planning Strategy 2050
[20] Department of Planning http://www.planning.wa.gov.au/publications/7113.asp Viewed 28/07/2015

The policy position:

- Provides for a strategic focus of broader planning concepts such as locations and precincts to replace the existing "strategic" and "non-strategic" tourism sites.
- Places greater emphasis on the local planning framework in addressing regional and local tourism issues and land use planning objectives.
- Highlights that local governments may set a limit to residential development as part of tourism sites within their local planning strategy or a local planning policy.
- Encourages developers to consider other non-tourist development (such as commercial, retail, conference/reception centre, restaurant/café) within tourism sites, before or at the very least in conjunction with any residential component. [21]

5   Other tourism organisations

5.1   Regional Tourism Organisations and Local Tourism Organisations

In addition to Commonwealth and State Government agencies, there are many Regional Tourism organisations (RTOs) Local Tourism organisations (LTOs) that play significant roles in developing tourism. They are not-for-profit organisations that receive support and financial assistance from State Government. An RTO plays a role in marketing and destination development for industry, Local Government and other stakeholders. LTOs promote local members and drive, as well as participate in tourism activities at a local level.

Regional tourism organisations include: Experience Perth, Australia's Golden Outback, Australia's South West, Australia's North West and Australia's Coral Coast and industry to deliver marketing activities in their regions. They are membership based organisations which attract members from industry and some Local Governments.

5.2   Tourism Council WA

The Tourism Council WA represents industry and promotes the value of tourism to the State economy, environment and the social fabric of local communities. Tourism Council WA develops evidence-based industry policy on: business regulation; marketing and events; parks and environment; planning and infrastructure; aviation and transport; and workforce development.

The Council advocates its policy agenda to government and maintains an active public profile and media presence to communicate critical industry issues. It also facilitates business and workforce development through training, workshops, site visits, online facilities and also provides accreditation courses.[22]

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[21]Department of Planning http://www.planning.wa.gov.au/publications/5811.asp Viewed 28/07/2015
[22] Tourism Council WA http://www.tourismcouncilwa.com.au/about Viewed 10/02/2015

5.3   Australian Hotels Association WA

The role of the Australian Hotels Association WA is to protect and develop its members' interests, to achieve new levels of success and excellence and maintain the vital role of the hospitality industry as an integral part of the Australian way of life. Its key objectives are:

- to maintain high standards of service and conduct in the liquor, hospitality, catering and entertainment industries
- to promote and protect the rights and interests of licensed hoteliers, taverners and other licensees engaged in the retail liquor trade
- to watch all proceedings in State and Federal Parliament and act as necessary
- otherwise assist, represent and act on behalf of its members
- Engage in commercial activities that are in the members interests. [23]

5.4   FutureNow – Creative and Leisure Industries Training Council

The State Government charges FutureNow with preparing workforce development strategies for the creative and leisure industries, including Tourism, Hospitality and Events, and advising on skills shortages and future training needs in Western Australia. FutureNow works in partnership with Government, industry leaders, registered training organisations, unions and national skills councils to achieve positive workforce outcomes.

FutureNow's mission is to influence and enhance its industries' future competitiveness by ensuring businesses and people have the right skills, in the right place at the right time. As the brokers in providing best practice workforce development solutions, FutureNow delivers the Hospitality Ambassador Program to secondary schools students.[24]

The Program brings young, qualified, successful chefs straight from the kitchens of Perth's finest restaurants into classrooms all over the State to present to students.

5.5   Western Australian Indigenous Tourism Operators Council

Western Australian Aboriginal Tourism Operators Council (WAITOC) is the peak not for profit Association representing Indigenous tourism in Western Australia. WAITOC comprises membership from all regions within Western Australia.

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[23]Australian Hotels Association http://www.ahawa.asn.au/about_ahawa/aha_at_a_glance.phtml
Viewed 04/08/15
[24] FutureNow (2015) About Future Now for WALGA

The Association is autonomous and provides advice and information to all relevant State Government agencies as well as the tourism industry sector. WAITOC promotes Aboriginal tourism and provides a supportive network for Aboriginal tourism operators within Western Australia.

WAITOC believes Aboriginal tourism is a unique industry that allows Aboriginal people to participate at a real and meaningful level while still maintaining and valuing their cultural heritage. WAITOC aspires to promote Aboriginal tourism experiences, and in doing so foster the development of new, culturally authentic Aboriginal tourism ventures that will attract visitors to Western Australia ensuring that visitors receive the authentic Aboriginal tourism experience they seek.

WAITOC represents over 50 Aboriginal tourism operators ranging from accommodation, traditional dance and dreamtime stories to contemporary history, safari and bush tours and art. Local Government roles in tourism.[25]

5.6   Restaurant and Catering Association

Restaurant & Catering Australia (R&CA) is the national industry association that leads and represents 35,000 restaurants and catering businesses across Australia. The members of R&CA are the owners and operators of restaurants, cafes and catering businesses and representatives of industry supplier businesses. Its strategic focus is to ensure owners and operators within the hospitality industry remain profitable and sustainable. For the wider hospitality community it aims to support continuous improvement of industry standards and professionalism.

In order to achieve these goals, R&CA proactively campaigns and lobbies all spheres of Government to ensure that the views of its members are heard. With the view to gaining the best representation for its members it works with state and Commonwealth industry bodies and tourism authorities. R&CA also provides a range of products and services that enable growth across all areas of the business.[26]

6   Local Government involvement in tourism

The roles and responsibilities of WA Local Governments are defined by the Local Government Act 1995 and are encompassed under 3.1 (1) of the Act which states "The general function of a local government is to provide for the good government of persons in its district".[27]

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[25] WAITOC http://www.waitoc.com/2014/index.html Viewed 28/07/15
[26] Restaurant and Catering Association http://rca.asn.au/rca/ Viewed 28/07/15
[27] *Local Government Act 1995*

Local Government roles and responsibilities relevant to tourism were outlined by Dredge, some of which include: planning, environmental, public health, disabilities, infrastructure and roads, local economic and community development, tourism employment, tourism promotion and marketing, arts and cultural development and human services. Some of these are discussed in more detail below. [28]

6.1 Planning

The Western Australian Planning Commission Act 1985 and Planning and Development Act 2005 provide frameworks for Local Government planning responsibilities. Within this legislation tourism sustainability is addressed although does not refer directly to tourism.

In short, land use planning is the control and regulation of land and development. The Western Australian Planning Commission (WAPC) defines it as the coordination of "land use and development by balancing economic, social and environmental issues".[29]

Whilst land use planning controls affect a wide range of industries, the diverse nature of the tourism industry is such that land use planning affects a range of tourism activities including accommodation, food and hospitality providers, retail, recreational activities and facilities, and many other activities catering for both local residents and visitors.

Local Governments face the difficult position of balancing community needs, rate payer needs with industry, and potential for economic development. A current example is the unregulated accommodation provided by Airbnb.

6.2 Environmental

Local Government's roles and responsibilities are outlined in in The Environmental Protection Act 1986 and the Conservation and Land Management Act 1984. Australia is a biodiversity hotspot, and home to between 600-700, 000 species, with 84% of plants, 83% mammals and 45% bird which are found nowhere else in the world. Local Governments' biodiversity planning can be imbedded into local planning schemes which are then protected under legislation.

Local Governments are also responsible for waste removal and environmental roles and responsibilities are also shared with the State and Commonwealth Governments. The Main legislation relating to waste and litter includes the Waste Avoidance and Resource Recovery Act 2007 and the Litter Act 1979.

The Waste Avoidance and Resource Recovery Act 2007 makes Local Government responsible for Local Government waste, which includes waste from households and their own waste.

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[28] Dredge, D et al (2006) Achieving Sustainable Local Tourism Management
[29] WA Planning Commission (2014) An Introduction to the Western Australian Planning System

By extension they are also responsible for public place bins and frequently (in the non-metropolitan areas) the only available waste disposal site.

6.3 Public Health

Local Government's Public Health responsibilities are outlined under the *Health Act 1911*, which include the following:

- Standards for sanitation and drainage
- Prevention of infection
- Notification of disease
- Acidity regulation in venues and outdoors, public toilets and BBQ areas

The Public Health Bill, released in 2014 may see the introduction of mandatory Local Government Public Health Plans.

The provisions of the Food *Act 2008* has tourism applications for Local Government including opportunities for catching and cooking fish caught as part of tours and the growing propensity for pop-up bars and restaurants.

6.4 Disabilities

The WA Disability Services Act 1993, (amended in 2004) requires Local Governments and State Government to develop and implement a Disability Access and Inclusion Plans. These plans ensure that people with disabilities including those who are tourists can access information, services facilities provided by Local Government.[30]

6.5 Infrastructure

Local Governments provide a vast range of tourism related infrastructure which amenity is essential in supporting tourism. The provision and maintenance of Local Government infrastructure exists across a range of legislation. Without infrastructure and amenity provision and maintenance tourism is compromised or in some cases cannot exist at all.

Local Governments provide and maintain 88% of the road network.[31] Other tourism related infrastructure includes: airports, airstrips, signage, caravan and camping grounds, public toilets, black waste dumps, leisure centres, sporting facilities, visitor centres, boat ramps, museum and art galleries and roadside rest areas.

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[30] WA Local Government Association and Disability Services Commission (2006) Disability Access and Inclusion Plans, Resource Manual for Local Government
[31] RoadWise http://www.roadwise.asn.au/local-government-involvement.aspx Viewed 04/06/15

An advisory group comprising WALGA and State government agencies is facilitating the development of a replacement Caravan Parks and Camping Grounds Act 1995. The Caravan Parks and Camping Grounds Regulations 1997, contain the legislation details and preliminary work on the regulations is being undertaken in parallel with work on the new act.[32] The current legislation is prescriptive and has proven not to have the flexibility needed to cope with changes to the market and consumer expectations. The new legislation focuses on the health and safety standards of sites designed for the use of a caravan, campervan or tent, but allowing the market to drive the supply of accommodation types.[33]

6.6 Visitor centres

There are 127 visitor centres throughout WA that provide a range of services to their visitors. Visitors perceive the main role of visitor centres as "providing credible, authoritative and unbiased information." They operate under four main models and employ 101 full-time staff, 202 part-time staff and 537 volunteer staff. Of these, 47% are run by Local Government, 32% by tourism associations, 13.5% by Community resource centres and 7.5% are private. [34]

In 2014, Local Governments raised a number of visitor centre concerns to WALGA, and visitor centres both in WA and around Australia have been the subject of past and recent review.

In 2004, the WA Tourism Commission prepared a Visitor Serving Study to examine the level of service to visitors in response to industry feedback.[35]

Then, in 2013 Tourism WA commissioned Haeberlin Consulting to determine the optimal role of visitor centres for consumers and industry, and recommend sustainable operating models for the visitor centre network. "The future of visitor centres in WA" report was released in August 2014.

The main objectives of the study were to develop recommendations on the WA visitor centre network as a whole, including numbers and location of visitor centres across the State and alternative channels for information and booking; and recommendations on new models and transition strategies for individual visitor centres. The report's findings can be found at www.tourism.wa.gov.au.

WALGA has consulted with the Visitor Centre Association Board (VCWA) Board which has agreed the report was comprehensive and reinforced earlier work.

Following the report, a Regional Visitor Centre funding program is now available through Royalties for Regions offering $4.2m over three years to regional visitor centres to help make them more sustainable.

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[32] Department of Local Government and Communities
http://dlg.wa.gov.au/Content/Legislation/UnderReview/CaravanCampingLegislation/CaravanCamping Act.aspx Viewed 09/06/15
[33] WALGA State Council Agenda (2014). Consultation paper – Proposal for Caravan and Camping Grounds Legislation – WALGA submission
[34] Haeberlin Consulting (2014). The future of visitor centres in WA
[35] Western Australian Tourism Commission (2004) Visitor Centre Servicing Study

$1.1m will be available in 2015-16. Accredited visitor centres or Local Governments can apply for grants between $10,000 and $100,000. Grants between $10,000 and $40,000 are available to non-accredited visitor centres (but they need to show they are actively working towards achieving accreditation as part of their application). Further information on the program and how to gain accreditation is available at www.tourism.wa.gov.au.

6.7 Other

The above roles and responsibilities provide a broad overview of tourism relevant legislation and roles that fall in the remit of Local Government. Due to the nature of tourism, this list may not be exhaustive but attempts to identify potential Local Government involvement in the wider context of visitor activity.

7   Tourism and the economy

- Australian tourism ranks ninth in the world for global tourism expenditure and has the world's largest global expenditure.

- Direct and indirect tourism employment in Australia comprises 8% of total employment

- Total tourism expenditure in Australia is worth nearly $100 billion (b)

- Domestic tourism is worth 70% of Australia's tourism expenditure

- 60% of visitors to Australia are over 15 years of age and are return visitors

- Over 5m visitors are likely to recommend Australia as a travel destination to relatives and friends

- Chinese visitors spend more than $4b visiting Australia is 2013[36]

Tourism is one of the world's biggest and fastest growing economic sectors. On a global level, tourism ranks fifth under the fastest growing sectors in the world and is forecast to grow by 4% each year from 2013 to 2033, more than doubling in size over the next two decades.[37]

As Australia's largest service export, tourism contributes an international visitor consumer consumption of $26b to the Australian economy and represents 8% of total Australian exports.

Both the "supply" and "demand" sides of the tourism industry are discussed in this paper. Tourism supply includes provision of infrastructure – accommodation, airports, airstrips and employment; while tourism demand refers to the consumers of tourism including international, domestic and day trip visitors.

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[36] Tourism Research Australia
http://www.tra.gov.au/documents/TRA_TEN_FACTS_ABOUT_TOURISM_FINAL_22052014.pdf
Viewed 20/01/2015
[37] Haeberlin Consulting (2014). The future of visitor centres in WA

7.1 Tourism Satellite Account

Conventional economic measurement does not usually recognise tourism as a discrete industry, instead, tourism is recognised as an activity that is impacted by many industries e.g. transport, accommodation, retail, education, tourism agency and tour operators, bars and restaurants, education etc. Nonetheless, the Australian Tourism Satellite Account measures both the indirect and direct contributions of the tourism industry. It is published annually by the ABS and provides measures of tourism gross domestic product (GDP), tourism gross value added (GVA), tourism trade, and employment in tourism. These estimates provide an indication of growth in the tourism industry.

7.2 Value of the Australian Economy

The latest value of the WA tourism economy is 9.33b, up from $8.76b in 2012/13 (by Gross State Product (GSP).[38] The WA tourism industry is an important contributor to the national tourism industry, accounting for 10.3% by GVA. Figure 3 – WA contribution to the tourism industry shows the WA contribution to the tourism industry by category in 2013/14. [39]

Figure 3 - WA contribution to the tourism industry, Source: Tourism WA

	Direct Tourism GVA ($m)	National Direct Tourism GVA ($m)	State Share of National Direct Tourism GVA
Same day travel	$393	$4,509	8.7%
Intrastate	$1,608	$13,475	11.9%
Interstate	$915	$10,673	8.6%
International	$1,189	$11,243	10.6%
Total	**$4,104**	**$39,900**	**10.3%**

The tourism industry directly contributes 1.6% to the State economy by Gross Value Added (GVA), and indirectly 1.6% making a 3.2% total. Direct tourism GSP was 1.7% of total GSP from all industries in WA. Tourism then contributes a further $4.15b of GVA and $4.86 to the economy in WA. In 2013/14 WA along with South Australia saw the strongest growth of GVA in Australia.[40]

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[38] Tourism WA
http://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/TSA%202013-14%20Fact%20Sheet.pdf Viewed 26/05/2015
[39] Tourism WA
http://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/TSA%202013-14%20Fact%20Sheet.pdf Viewed 26/05/2015
[40] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15

Following the national trend, the economic value of the WA tourism industry is rising. Figure 4 - Tourism's Economic Value 2009 to 2014 in WA – Key Estimates displays the increase trend in tourism's economic value from 2009 to 2014 in WA. Local Government plays a significant role in both tourism supply and demand which in general presents an important consideration in Local Government strategic and operational planning.

Figure 4 - Tourism's Economic Value 2009 to 2014 in WA – Key Estimates, Source: Tourism WA

Total contributions	2009-10	2010-11	2011-12	2012-13	2013-14
GVA ($b)	6.40	6.54	7.49	7.67	8.26
GSP ($b)	7.19	7.33	8.44	8.66	9.33
Employment	76,000	79,000	88,000	89,000	94,000

Figure 5 – Industry contribution to the tourism industry displays industry contribution to tourism in WA with the highest contributors as accommodation, cafes and restaurants bars and clubs, followed by transport. Accommodation, cafes and restaurants clubs and bars and retail are regulated by Local Government planning; roads as a provision for transport and other mentioned categories all interface at some level with Local Government.

Figure 5 - Industry contribution to the tourism industry, Source: Tourism WA

Industry contribution to the tourism industry	Direct contribution to WA Tourism GVA ($m)	Direct contribution to WA Tourism GVA (%)
Accommodation, cafés and restaurants, bars and clubs	$1,458	36%
Transport	$948	23%
Retail	$520	13%
Ownership of dwellings	$351	9%
Education	$252	6%
Travel agency and tour operator services	$216	5%
Entertainment and recreation	$141	3%
All other	$217	5%
Total	**$4,104**	**100%**

7.3 Supply

Tourism supply includes aviation, roads, accommodation, employment and digital technologies. Most Local Governments are active in aspects of tourism supply in some capacity; those Local Governments not directly involved in aspects of supply will almost certainly be affected by the activities of other Local Government activities in their regions and tourism networks. The current national and State trends are discussed below.

7.3.1 Aviation

The WA State economy and population is growing at double that of other states and territories, and consequently airports have been placed under great pressure. In WA, significant upgrades to airport infrastructure and roads are being undertaken at and around Perth Airport and planning for the development of Busselton Airport. [41]

Airports support airline activity and therefore visitors and access to destinations. From an economic perspective, it is relevant for Local Governments have an awareness of airline activity because it affects visitation. In 2013/14, Australia and WA experienced an increase in revenue for passengers and seats, meanwhile Australian airlines recorded significant losses mainly due to airline expenditure and the increase of the Australian dollar which increased fuel prices.

7.3.2 Accommodation

Accommodation supports overnight visitation. The year 2013/14 saw support from hotel investors and developers with 1,300 hotel rooms out of the State's target of 1,900 rooms by 2020 for Perth CBD to be committed for development.[42]

In the period from 12/13 to 13/14 accommodation room supply increased by 2% in WA, however revenue per available room was down by 11% which was the lowest recorded figure of any state or territory in Australia. [43] This decrease is linked to the slowing down of the resources sector, and an important consideration for those Local Governments that rely on resources and their roles into the future.

7.3.3 Investment/infrastructure

Projects are underway throughout Australia and WA that aim to support growth, and further opportunities are discussed in this paper.

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[41] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15
[42] Tourism WA Annual report 13/14
[43] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15

In WA, current investment and infrastructure projects within tourism include attracting tourism investment, improvement of aviation access, increasing hotel and eco-accommodation development, cruise shipping, and developing the caravan and camping sector.[44]

7.3.4 Employment

In terms of employment contribution, WA tourism employment accounts for 10.8% of national tourism employment. As displayed in Figure 5, tourism employment numbers have also been rising since 2008.[45] These figures reflect growth of employment in Local Government jurisdictions in general and may not apply to all Local Governments; although the trend is relevant in the context of the growth in tourism.

7.3.5 Digital technologies

Digital technologies are continually evolving and usage continues to grow. Australia wide, web presence in tourism increased from 84% in 2010 to 91% in 2013 and instant booking confirmations 42% in 2010 to 62% in 2013 reflecting the increasing use of digital technologies, which is projected to grow further still.[46] Local Governments may be impacted through visitor centres and on a broader scale for example in their marketing activities.

7.4 Demand

7.4.1 Visitor activity

Visitor activity, as discussed, is defined in terms of international visitors, domestic visitors and day trip visitors. The following details general visitor activity in WA and visitor activity within geographical regions, in which Local Governments are identifiable.

Overall, travel to and within WA increased in 13/14 with 8.6% growth in overnight visitors. Although interstate visitors decreased by 1%[47], there was a 2.5% increase in intrastate visitors who spent $8b in WA[48]. In recent years the mining boom's price hikes have deterred interstate visitors with WA being an expensive option. This however is changing with the fall in the Australian dollar making it cheaper to travel to WA.[49]

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[44] Tourism WA Annual Report 2013/14

[45] http://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/TSA%202013-14%20Fact%20Sheet.pdf Viewed 26/05/15

[46] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15

[47] Tourism WA, Annual Report 2013/14

[48] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15

[49]Tourism can be the new gold mine in WA https://au.news.yahoo.com/thewest/a/26805171/tourism-can-be-the-new-gold-mine-in-wa/ Viewed 28/05/15

International visitors

China is the strongest international growth market in Australia. The new air services agreement announced in January 2015 between the Australian and Chinese governments aims to bring thousands of additional passengers from China.

Traditional markets such as the UK and Germany are also continuing to grow. Overnight business tourism has returned to growth after recent decline; an indicator of increased confidence in the Australian economy.[50]

In WA, foreign national arrivals to WA is at 7%, which is behind the national growth of 9% for Australia. (Tourism WA); meanwhile WA significantly outperformed the rest of Australia in growth from Singapore, New Zealand, and Korea in 13/14. [51]

Intrastate and Interstate arrivals into WA

From 2013 to 2014 intrastate passenger numbers increased by 2.5%; while interstate passenger numbers declined through Perth Airport by 1.0% in the year 2014. [52]

It was the first time interstate passenger numbers decreased into Perth airport; however interstate visitor expenditure increased by 3.9% for the year ending 13/14, with WA as one of three top contributing states. [53]

Departures

Outbound visitor numbers affect inbound visitor potential with an increasing trend for Australians to travel to South East Asia with low cost carriers and choose cheaper holiday options. This trend compromises visitor numbers to WA destinations that are in direct competition with South East Asian destinations. In 2013/14 there was an 8.6% increase in WA travelling overseas for holiday and leisure purposes.[54]

Purpose of visits

Purpose of visits are categorised by Tourism Research Australia as visiting relatives and friends, holiday/leisure, business, education and employment.

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[50] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15
[51] Tourism WA Annual Report 2013/14
[52]Tourism WA http://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/Industry%20Health%20Scorecard_January%202015.pdf Viewed 11/06/15
[53] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15
[54] Tourism WA http://www.tourism.wa.gov.au/About%20Us/What_we_do/Pages/Performance-Reporting.aspx Viewed 26/05/2015

Those visiting friends and relatives is following current global trends and is growing across all travel types, and was the fastest growing travel purpose for international visitors in Australia.[55] WA has a large overseas born population strengthening its position in the visiting friends and relatives market.

Measuring visitors

In Australia, Tourism Research Australia measures visitor activity using the International Visitor Survey (IVS) and the National Visitor Survey (NVS).

International Visitor Survey

The IVS measures the activity of visitors who come to Australia for less than one year, although they exclude visitors who are under 15 and include visitors coming to Australia for employment purposes.[56]

National Visitor Survey

The NVS includes visitors representative of the Australian population who have travelled for purposes including holiday, visiting friends and relatives, business, education and employment. These travellers must not have been away from home continuously for more than 364 days, or in a leap year 365 days.[57]

Geographical areas

Tourism Research Australia provides regional profiles for 77 regions throughout Australia. The profiles include tourism demand and supply data which can be utilised to produce reliable visitor information to support the development of regional tourism and growth of regional economies. There are seven regions within WA — Australia's Coral Coast, Experience Perth, Australia's South West, Australia's North West and the Golden Outback. Each Local Government belongs to one of these regions and is shown in the Appendix, Figure 14.

Tourism Research Australia also provides visitor information for some individual Local Governments where adequate IVS and NVS information and demographic and business data are available from the ABS. For these Local Governments, TRA generates reports including: top international markets, and international, domestic and day visitor numbers. These Local Government specific reports can be found at http://tra.gov.au/Tourism_in_Local_Government_Areas/LGA_Profiles/index.html#.

In the year ending March 2015, an estimated 8.7 million overnight visitors travelled to/within WA, and Western Australians took an estimated 17.5 million daytrips within the State.

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[55] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15
[56] Tourism Research Australia http://www.tra.gov.au/aboutus/international-visitor-survey.html Viewed 14/04/2015
[57] Tourism Research Australia http://tra.gov.au/aboutus/national-visitor-survey.html Viewed 14/04/2015

Together, these visitors spent an estimated $8.9 billion in WA, broken down by region as follows:

- Experience Perth: $5,059 million
- Regional WA: $3,827 million
    - Australia's South West: $1,579 million
    - Australia's North West: $1,000 million
    - Australia's Coral Coast: $702 million
    - Australia's Golden Outback: $508 million

WA's regional expenditure trends are displayed in the Appendix, Figures 15 and 16 for years 2010-2014, ending in September. Please note the above figures are the latest for year ending March 2015. Overall, the trends are displaying an increase in expenditure throughout WA.

Other relevant visitor statistics are following in the Appendix, Figures 17-22, and further visitor information can be found at www.tourismwa.wa.gov.au.

7.5 Forecast

Together with upward trends, attractions and the fall in the Australian dollar, Deloitte has recently forecast promising gains from tourism. WA is also supported by its proximity to Asia and strength in international markets with China leading the way. Needless to say, our natural assets are unique and infinitely attractive. Deloitte has also pointed to our strengths including safety; the ease of an English speaking country combined with other languages along with cheaper flights into Australia means there are more flights into Australia (and out); and the education system that attracts foreign students.

Against Australia's strengths, infrastructure is lacking. Aviation capacity must increase by 30% to meet the need of forecast visitors, and accommodation is in shortage. Employment skills are scarce due to the mining boom and tourism offerings from industry must be consolidated.[58]

Local Governments across Australia and within WA are diverse with varying roles and involvement in tourism and are up against the challenge of limited resources and funding. From an economic perspective, it is almost certain that each Local Government will be impacted by tourism, either directly or indirectly, in different ways and to varying degrees against the economy's challenges and promising forecast growth on global, national state and local levels.

8 National and State Tourism Strategies

The national and State tourism strategies are both characterised by "phases" of delivery. They provide the frameworks in which tourism priorities are directed nationwide, within WA and its Local Government.

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[58] Positioning for prosperity? Catching the next wave. Deloitte 2014

Tourism Australia and Tourism WA are responsible for delivering these strategies in collaboration with stakeholders and industry.

Figure 6 - National Long-term Tourism Strategy illustrates the National Long-term Tourism Strategy and its life cycle. Due to the dynamic nature of tourism and many influencing factors the original strategy was adapted to form Tourism 2020 and the Commonwealth is currently devising its Implementation Plan 2015-2020. [59]
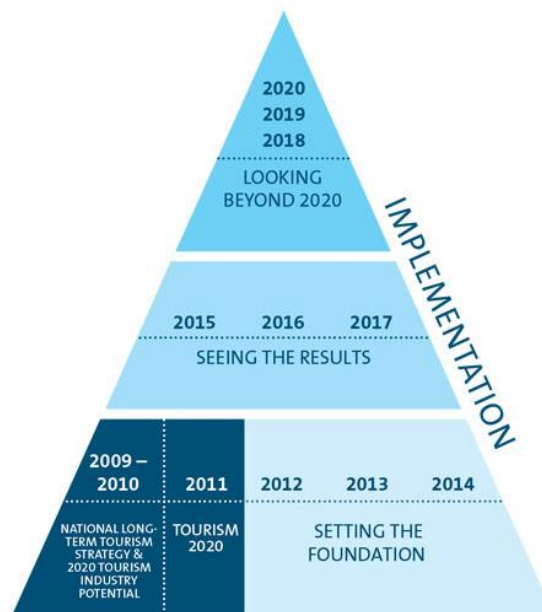
Figure 6 - National Long-term Tourism Strategy, Source: Austrade

8.1   National Long-term Tourism Strategy

The National Long-term Tourism Strategy was launched in December 2009. The first phase of the strategy included:

- positioning for long-term growth
- leadership
- informing industry and government
- facilitating investment and regulatory reform
- labour and skills
- responding to the challenges
- excellence in product service delivery
- strengthening competitiveness with industry and product development

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[59] National Long-term tourism Strategy https://www.austrade.gov.au/Tourism/Policies/National-long-term-strategy Viewed 08/01/15

- measuring performance[60]

8.1.1 Tourism 2020

The first phase of research and consultation of the National Long-term Tourism Strategy informed a basis for the next stage of the Strategy – Tourism 2020 released on 6 December, 2011.

The Strategy emphasises a whole of government and industry approach for effective implementation with a focus on:

- growing demand from Asia
- building competitive digital capability
- encouraging investment and implement regulatory reform agenda
- ensuring tourism transport environment supports growth
- increasing supply of labour, skills and indigenous participation
- building industry resilience, productivity and quality

As shown above, Tourism 2020 integrates the National Long-Term Tourism Strategy and Tourism Australia's 2020 Tourism Industry Potential with the aim of developing and supporting the industry.

8.1.2 Tourism Industry Potential

The Tourism Industry Potential aims to double tourism overnight visitor expenditure to between $115 and $140b. This range target approach is used to allow for economic, health, potential terrorism and other factors that may influence industry growth.[61]

According to State of the Industry, October 2014, the potential is just below the lower limit target and is in transition from the 'setting the foundation' phase to 'seeing results' phase.[62]

The integration of the National Long-Term Tourism Strategy and the Tourism Industry Potential 2020 is being updated into Tourism 2020 Implementation Plan.[63]

8.1.3 Tourism Implementation Plan 2015-2020

The Chairs of the National Tourism Alliance, Tourism and Transport Forum, Australian Tourism Export Council and the Australian Regional Tourism Network have presented proposed game changing reform priorities to achieve the upper range of the Tourism 2020 Potential.

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[60] Austrade http://www.austrade.gov.au/Tourism/Policies/National-long-term-strategy Viewed 08/01/2015

[61] Tourism Industry Potential, A Scenario for Growth http://www.tourismaccommodation.com.au/wp-content/uploads/2012/10/TA-2020-Tourism-Potential.pdf Viewed 26/05/2015

[62] Tourism Research Australia http://www.tra.gov.au/documents/State-of-the-industry/TRA_State_of_the_Industry_2014_FINAL.pdf Viewed 26/05/15

[63]Tourism Australia http://www.tourism.australia.com/statistics/tourism-2020.aspx Viewed XX/03/2015

Round table discussions in 2014 were held in all states and territories with government and industry representatives to determine the top five game changing priorities and Tourism Ministers have agreed to:

- Cross portfolio commitment within all levels of Australian Governments;
- Improved visa arrangements;
- Improved airports experience and aviation capacity; and
- Integration of national and State tourism plans into regional development and local government planning.

As part of the Implementation Plan they also agreed that the labor market should be made more flexible and that marketing should be a priority for both government and industry for Australia to be globally competitive. Ministers also agreed that the Australian and State and Territory Governments, and industry would pursue the game changing actions together. It is expected an Implementation Plan will be released in late 2015.[64]

8.2 State Tourism Strategy

The State Government Strategy for Tourism in WA 2020 was released in December 2012. Tourism WA reports on the Strategy through its Corporate Plan. Its goal is "to double the value of Tourism in WA – from $6b in 2010 to $12b by 2020", which aligns with the National strategy.

8.2.1 Strategic pillars

The Strategy has identified seven pillars to achieve its goal which address both demand and supply sides of the industry. These are illustrated in Figure 7 - Tourism WA, 7 Strategic Pillars for Growth.

Figure 7 - Tourism WA, 7 Strategic Pillars for Growth, Source: Tourism WA Corporate Plan 2014/15

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[64] Austrade http://www.austrade.gov.au/Tourism/Policies/National-long-term-strategy Viewed 08/01/2015

In addition to these pillars, Tourism WA focuses on established international markets, policy development and guidance, research and analysis and interaction with stakeholders.

As with the National Strategy, there are three different growth phases within the State Government Strategy for Tourism in WA 2020, which align with the National Strategy; these include setting the foundation, gaining momentum and achieving the potential. [65]

In Tourism WA's initiatives from 2010-2014, WALGA was involved in the Caravans and Camping Strategy and Local Governments have been consulted through components of the Cruise Shipping Strategy and Busselton Airport Strategy. The State Aviation Strategy which was released by Department of Transport also involved consultation with WALGA.

8.2.2 Cornerstone initiatives

Following Tourism WA's strategies 2010-2014, Tourism WA has recently drafted five cornerstone initiatives 2015-2017 to achieve its 2020 target.

These are Destination Perth, Busselton Airport Expansion, Regional Tourism Framework, Perth Stadium Activation and Brands and Markets Roadmap. The cornerstones are in draft and provide a timely opportunity for Local Government integration. These are discussed in more detail following.

Destination Perth is a coordinated strategy to position Perth as an extraordinary tourism destination – aligning the activities of key partners such as Experience Perth Regional Tourism Organisation, Perth Convention Bureau, Study Perth and Local Governments. The positioning will highlight the appealing attributes of Perth – world class beaches, active outdoor pursuits, wildlife, food and wine – to the interstate market and Chinese and South East Asian visitors and its key international markets who see Perth as a destination.

Inputs include the significant investment in CBD or metropolitan area (e.g. Stadium) infrastructure and tourism precinct redevelopment. Activation of that infrastructure will occur through increased destination marketing, the business events strategy, support for Perth Convention Bureau and a separate "stadium events strategy" aligned with the well-established major events calendar. A new food and wine tourism strategy for the State will also provide direction for the development and promotion of new dining experiences in and around the city, including Perth's urban villages - Victoria Park, Subiaco, Leederville and Mount Lawley.

Desired Outcome: Destination Perth aims to boost current growth projections through increased destination marketing and alignment of existing and new initiatives and coordination of the activities of key partners, which are focused on Tourism WA's key markets.

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[65] Tourism WA Corporate Plan 2014/15

Busselton Airport Expansion (Expansion of the Busselton Regional Airport will open WA's largest tourism–ready region to prospective visitors on the East Coast of Australia. This is the game changing opportunity for the South West)

Busselton Airport Expansion is a strategy to align tourism efforts to support the introduction of direct air access from the East Coast to remove the barriers of time, distance and cost – creating affordable air access to the region and unlocking the market potential. Extending and strengthening the runway to receive interstate flights is critical to achieving this outcome and supports the work already undertaken by the City of Busselton to refresh the airport terminal. The strategy includes preparing the industry to adapt to the non-drive market and grow tourism numbers to instil confidence in airline decision-makers to commence flights once the airport expansion is completed.

This work is being delivered by the State Government, Local Governments and the tourism industry.

Examples include the State Government's investment in Margaret River Gourmet Escape, Margaret River Pro, Busselton events and various adventure events, plus a refreshed destination positioning and boosted marketing effort by a new Local Tourism Organisation (Margaret River-Busselton Tourism Association) in partnership with Tourism WA and Australia's South West Regional Tourism Organisation.

The local tourism industry will contribute to this success through contributions to a cooperative fund for airline marketing, possible marketing underwriting and industry development activities.

Desired outcome: Busselton Airport Expansion will unlock the region's market potential by creating direct air access from the East Coast.

Regional Tourism Framework (Empowering the regional tourism industry by identifying the tangible opportunities (and building the capability) to drive visitation and (sustainable) economic growth in the regions)

The Regional Tourism Strategy is a coordinated strategy to harness the opportunity offered by significant government investment in regional tourism infrastructure by focusing on building industry capacity and local leadership to help develop strong and sustainable tourism destinations across the State. This will be facilitated through a tailored destination management strategy, collaborative tourism destination planning framework, a regional visitor centre grants program and Tourism Council WA's Tourism Advantage program.

The State Government is investing significantly in National Park infrastructure and regional centres, such as the new National Anzac Centre in Albany, the Chinatown redevelopment in Broome and the proposed Skywalk in Kalbarri.

Further investment will be made through Royalties for Regions with a focus on caravan and camping infrastructure, Aboriginal Tourism Development Program, cruise shipping and major infrastructure linked to the Regional Development Commissions' Investment Blueprints and Local Government commitment.

Awareness and interest in these tourism destinations will be boosted through increased funding for the Regional Tourism Marketing Program (RTMP) and enhanced cooperative arrangements with the Regional Tourism Organisations – Australia's Coral Coast, Australia's North West, Australia's South West and Australia's Golden Outback.

A continued investment in the *Royalties for Regions* Regional Events Program and Regional Events Scheme will add further vibrancy to regional communities and aims to strengthen the State's tourism offering. Affordable aviation strategies and Tourism WA's involvement in the State Government's regulated routes tender process will help more of WA to become accessible.

Desired Outcome: Seize the opportunity this infrastructure investment offers by building a cohesive plan to strengthen industry capacity and local leadership to help develop strong and interconnected tourism destinations across the regions where many of the extraordinary experiences are.

Perth Stadium Activation (leveraging the stadium to position WA as a globally competitive events tourism destination)

The Perth Stadium will be a new tourism asset that will significantly boost WA's ability to host major sporting events, concerts and stadium 'spectaculars', thereby attracting more visitors. Once completed, the stadium could attract an additional 65,000 visitors per year spending $112m per year.[66]

The State Government has invested $860m to build the new stadium. A purposeful and strategic approach is needed to deliver a return on this investment and economic outcomes through tourism and spread the benefits across the State. Tourism WA will work with key partners – Department of Sport and Recreation, Venues West and the stadium operator – to secure event funding to create and execute a stadium events attraction strategy inspiring further stakeholder commitment with a compelling business case, launch event marketing and event development, acquisition and relationship/contract management.

The Burswood precinct will be activated further with the opening of a new 500 room 'six star' hotel, Perth's largest hotel, Crown Towers. Tourism WA will investigate cooperate marketing campaigns with interested parties (egg Crown Perth), implement a new tourism product development strategy for the precinct and integrate the marketing of stadium events with its destination promotions for WA.

Desired outcome: Increased visitation across the State from the opportunities a state of the art 60,000 seat stadium and an innovative events program can deliver.

Brand and Markets Roadmap (defines what the State stands for, how it is positioned, which markets to target and why, and for which segments (either trade and/or consumer)

The Brand and Markets Road Map Cornerstone Initiative will simplify and fine-tune Tourism WA's communications and provide a model that enables ongoing stakeholder commitment and investment

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[66] AEC Group modelling

behind the Experience Extraordinary brand. It will define the growth market opportunities, and it will differentiate WA from other tourism destinations by ensuring that messaging focuses on the key attractions and experiences for each region which have been proven through research to resonate with target markets. Specific strategies have been developed to elevate Food and Wine tourism and Aboriginal tourism.

The brand vision will be delivered in a contemporary way through Tourism WA-sponsored events, a distributed content strategy, marketing partnerships and campaigns. Consumer insights and market analysis will guide further refinements to Tourism WA's marketing assets, channel strategy and media-buy. Digital, PR and content activity will share stories and information designed to inspire, engage and educate Tourism WA target markets.

Tourism WA aims to ensure that consumers can easily find and book a WA holiday that fits their needs via strategic marketing partnerships with airlines; key players in the domestic and international travel industry; and, through focussed marketing activity with our international offices.

A market prioritisation model will align the brand position with target markets so Tourism WA can be confident that what is packaged and promoted in any market, is what is most appealing to the target consumers.

Desired Outcome: Further activate the Experience Extraordinary brand, significantly increasing both brand awareness and ensuring conversion to booking through an 'action marketing' approach.[67]

9 WALGA consultation with Tourism WA and Regional Development Commissions

Since January 2015, WALGA representatives have met with Tourism WA and contacted the nine RDCs.

The Tourism WA 2020 Strategy, Local Government and WALGA are included as stakeholders in some aspects of the Strategy, however omitted in others. There is some Local Government and WALGA involvement in strategies as mentioned, and senior Tourism WA management meets with Local Governments annually to provide support; however formal integration of the State Strategy with Local Government is unclear.

WALGA has also made contact with each RDC to discuss their roles with Local Government at strategic and operational levels. The Commissions reported strong relationships with Local Government with each Commission's support depending on the regions and Local Government needs.

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[67] Tourism Western Australia Draft Corporate Plan 2015-16

In 2010, Tourism WA's regional support representative from each of the regions was withdrawn (except for the South West). Some Commissions have taken on this role by default, although for most commissions tourism is not an area of expertise.

There is a gap in terms of roles and expectations once the responsibility of a Tourism WA officer. RTOs and LTOs provide support on a marketing level but not in other essential areas of tourism development.

This impacts on Local Governments. Tourism leadership at a State level is unclear, which in turn affects the direction and activity of Local Government. This gap is also reflected in Local Government feedback and is addressed in this paper's recommendations.

Tourism WA was informed of the draft of this paper and has formally indicated support for WALGA's initiative and is interested in working collaboratively with WALGA and Local Governments. The Great Southern Development Commission has also offered to assist WALGA. Details follow under item 13 Recommendations.

10 Tourism Policy and Planning

The economic evidence and trends relevant to tourism demonstrate that tourism will have an increasing impact on Local Government. The extent and importance of tourism within each Local Government however may differ.

In an attempt to understand how tourism operates and its evolution through the decades, Jafari, identified four platforms in tourism delivery which Macbeth further developed into six platforms of tourism: advocacy, cautionary, adaptancy, knowledge, sustainable, value full: [68]

> *Advocacy model* - an early strategy centred on 'more tourism is better' without consideration of social and environmental issues.
>
> *Cautionary model* - the opposite of advocacy model – showing effects of the environment, and cultural and social values
>
> *Adaptancy model* - provided alternative models of tourism which suited communities
>
> *Knowledge model* - adaptancy evolved to the knowledge platform where there was the understanding that tourism is complex and evidence to inform policy and planning decisions
>
> *Sustainable model* - this platform required assessment of social, economic, cultural and environmental factors. The idea of sustainable tourism was embraced in the 1990s and the term is used today. The WTO defines sustainable tourism which "takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"[69].

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[68] Macbeth, J. (2005) Towards an ethics platform for tourism. Annals of Tourism Research, 32 (4). p 962-984

[69] United World Tourism Organisation http://sdt.unwto.org/content/about-us-5 Viewed 14/05/2015

In practicing this definition, sustainable tourism focuses on the best use of environmental resources, maintaining ecological process and conserve heritage and biodiversity.

The socio-cultural meaning of communities and built and cultural heritage and values and tolerance. The long-term economic operations should be viable including staple employment opportunities.

- o Again the theme of collaboration and participation of all stakeholders, as well as strong government leadership is required. Sustainable tourism is constant and requires monitoring of impacts; introducing necessary change measures when necessary.
- o Tourists should be highly satisfied and should also be aware of sustainability processes and issues.[70]

Value Full - Macbeth identified that given the above, policy and planning decisions are based on what is believed and valued. It takes the sustainable platform one step further and poses the questions of ethics when considering social, economic, cultural and environmental factors. The sixth platform, an ethics platform, questions the morality of the positions taken in policy, planning, development, and management.

Tourism development (or the decision not to develop) can take many forms and is not prescriptive. These platforms aim to identify how tourism has been perceived through time to the present.

It invites Local Governments to consider their own current positioning and may stimulate discussion for planning now and in the future.

11 Local Government survey and feedback

In February 2015, WALGA distributed a survey to Local Governments to assist with developing recommendations on future WALGA and Local Government roles in tourism.

WALGA requested response to the following questions:

- How important is tourism development for your Local Government?
- Does your Local Government have strategies in place for tourism?
- Does your Local Government provide any tourism facilities/services?
- Are there any barriers in developing tourism in your Local Government area?
- Does your Local Government have any concerns about developing the local tourism industry?
- Does your Local Government receive State Government Agency support in developing the local tourism industry?
- Does your Local Government receive tourism development guidance from any other source?
- Does your Local Government belong to a tourism alliance or network?

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[70] Making Tourism More Sustainable - A Guide for Policy Makers *(*2005) UNEP and UNWTO

- Is your Local Government interested in working collaboratively with other Local Governments?
- What tools/guidance/support would assist your Local Government in developing tourism within your Local Government?
- Does your Local Government have any further comments?

WALGA's Local Government survey was distributed to 139 Local Governments in February 2015. There were 31 Local Governments that responded, of which 25 were non-metropolitan and 5 metropolitan.

There were 106 Local Governments that did not respond to the survey; they were emailed with the following questions:

- Does your Local Government currently have a tourism strategy, and if so could WALGA obtain a copy?
- Does your Local Government have a Tourism Manager and or/Officer, and if not who is responsible for tourism?

Of the 106 Local Governments sent these questions, 53 Local Governments responded.

The findings of both surveys are summarised following.

1. How important is tourism development for your Local Government?

Local Governments were requested to rate tourism development as high, medium, low priority or other.

Of those Local Governments that responded, most Local Governments ranked tourism as medium priority, followed very closely by high priority. Only one Local Government that responded rated tourism as low priority. Of the 33 Local Governments that responded, 29 Local Governments rated tourism as either medium or high priority. Figure 8 - Importance of tourism to Local Governments displays survey results.

Those Local Governments that either responded to the survey or follow-up email regard tourism as a medium to high priority, and/or have a tourism strategy which demonstrates a commitment to tourism and the sector's need for support in developing tourism. Although it is acknowledged that for some Local Governments, tourism development is not favourable – if this is the case those Local Governments must be rigorous in their rationale.
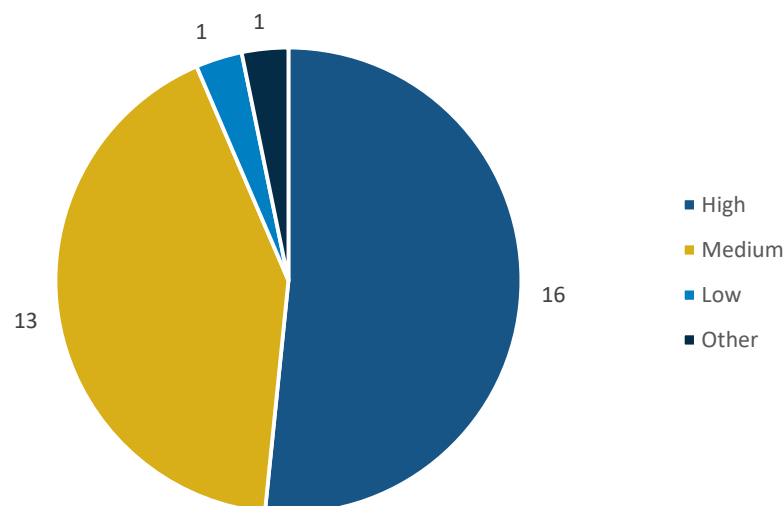
Figure 8 - Importance of tourism to Local Governments

2. Does your Local Government have strategies in place for tourism?

There were 86 Local Governments that responded including those Local Governments that completed the survey and the follow-up email and phone survey. Results are displayed below in Figure 9 – Local Government strategies for tourism. Of those Local Governments that responded, approximately 50% did have strategies in place for tourism, while 50% did not. This again represents Local Government's general commitment to tourism, and a gap in strategy development which is further supported by feedback from question 9.
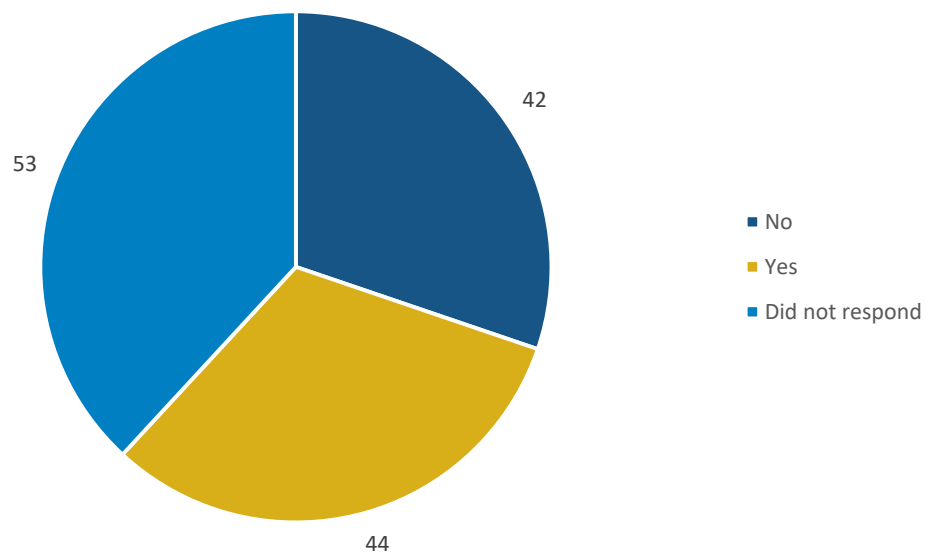
Figure 9 - Local Government strategies for tourism

3. Does your Local Government provide any tourism facilities/services?

Local Governments that responded identified their tourism infrastructure which indicates the degree of Local Government involvement in tourism and the diverse capacity and resources required to build, maintain and manage its infrastructure and services. This included visitor centres, roads, airports and airstrips, caravan and camping facilities, leisure centres, black waste dumps, libraries, and community resource centres.

4. Are there any barriers in developing tourism in your Local Government?

Of those Local Governments that responded, the vast majority indicated barriers in developing tourism, with 23 Local Governments responding yes and just 3 responding no. These are displayed in Figure 10 – Local Government barriers to developing tourism.
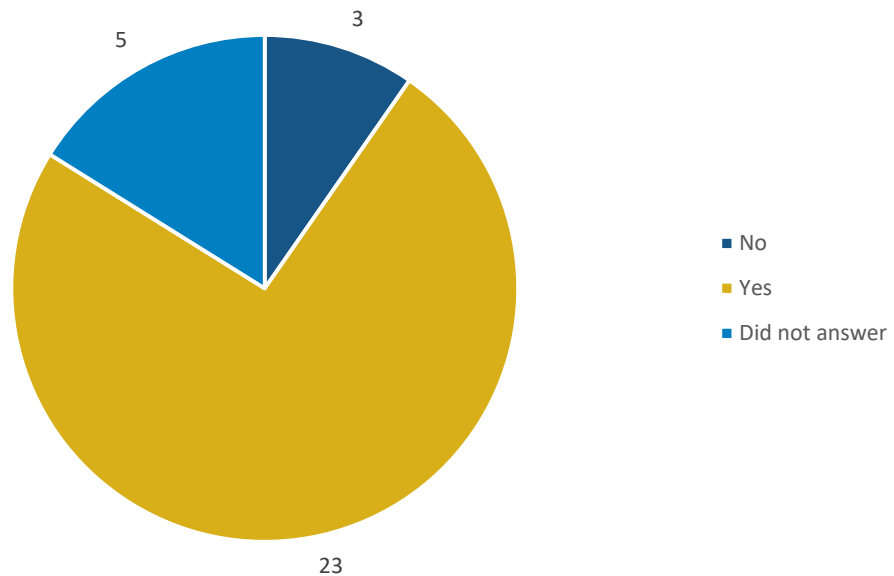
Figure 10 - Local Government barriers to developing tourism

The trends apparent in the results include barriers to:

- Funding - lack of resources to obtain visitor numbers, and lack of infrastructure or spend from State Government, budget constraints on aging buildings and infrastructure
- Regional approach needed, not many working together
- Marketing activities are limited within industry
- Need for destination marketing
- Need for private investment
- Local industry education, elected member education, training, drive at community level.
- Mining construction boom has created issues with cost and availability of labour and accommodation, lack of tourism product and tours etc., perception of the area as predominantly mining, high cost of airfares, transient population depending on work

5. Does your Local Government have any concerns about developing local tourism?

Of those Local Government that responded to these questions, 15 did not have concerns and 11 had concerns about developing Local Government tourism. These are displayed in Figure 11 – Local Government concerns in developing tourism.
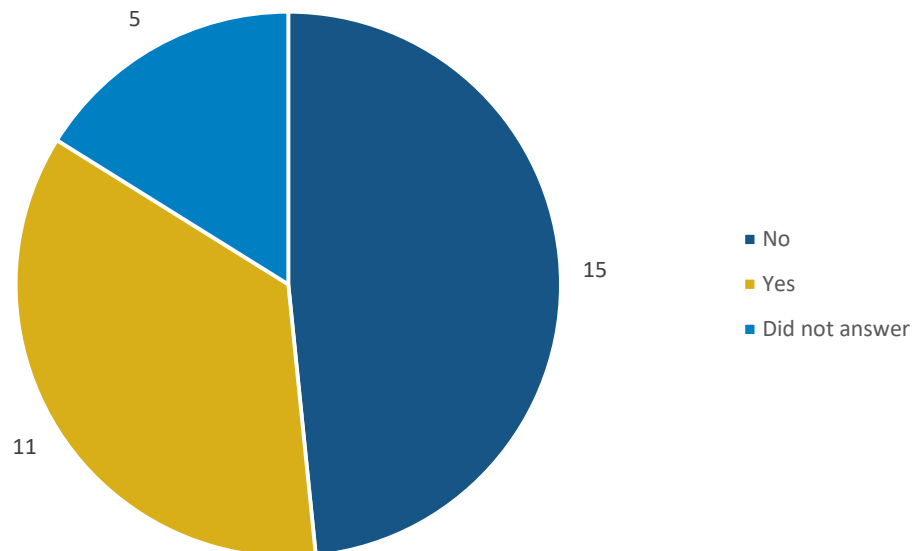
Figure 11 - Local government concerns in developing tourism

Themes around developing tourism included:

- Managing expectations of those involved in tourism
- Lack of coordination and duplication of resources
- Lack of a united voice
- Some Elected Members and Local Governments do not understand tourism
- Lack of tourism operators
- Lack of signage
- Limited road access
- Accommodation price ranges
- Gateways to other destinations with the need to develop own identity.

6. Does your Local Government receive State Government Agency support in developing the local tourism industry?

Of the Local Government responses received, 14 stated that they did not receive State support, while 12 did receive support. These are displayed in Figure 12 – State Government agency support in tourism.
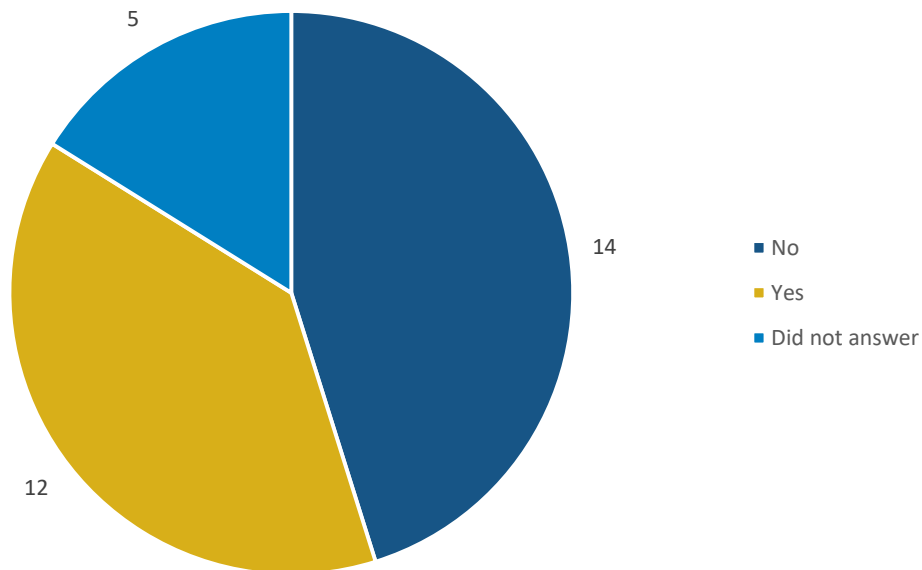
Figure 12 - State Government agency support in tourism

This finding suggests that almost half of the Local Governments surveyed do not receive State agency support in tourism.

7. Does your Local Government receive tourism development guidance from any other source?

Local Governments received support from a number of other organisations including LTOs, RTOs, alliances, networks, other tourism groups, regional councils and Tourism Council WA. Of those Local Governments that responded, 11 do not receive support from another source while 15 do.

8. Does your Local Government belong to a tourism alliance or network?

The responses received indicate there is a large number of tourism organisations, alliances and networks throughout the State. There is no central record of these, their roles, interactions and furthermore their networks, information sharing and collaboration. These are represented in Figure 13 – Tourism alliance or network.

Legend:
- No
- Yes
- Did not answer

Values shown: 4, 5, 22
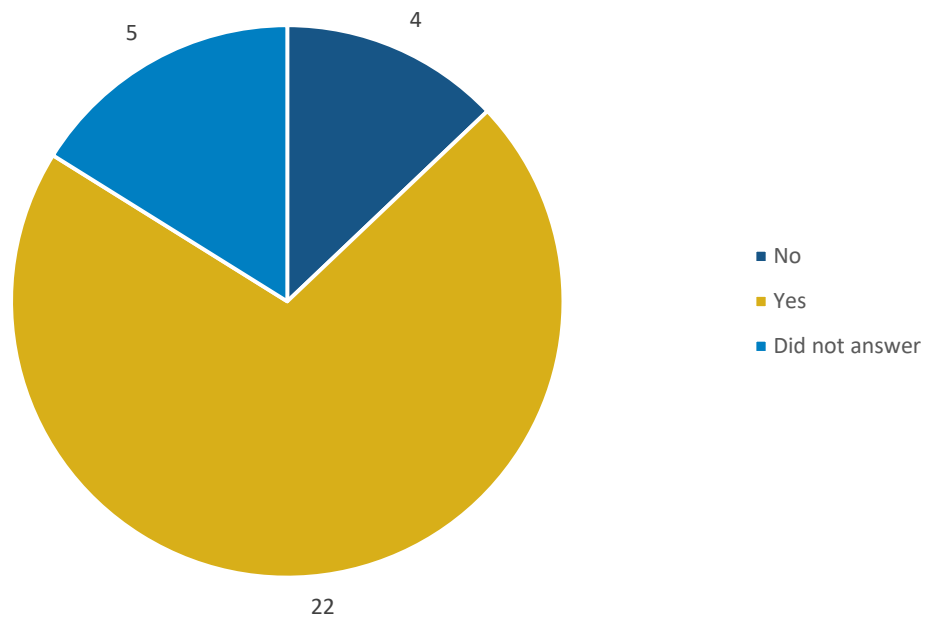
Figure 13 - Tourism alliance or network

This supports the need for a centralised and coordinated network of tourism organisations operating within WA.

9. Is your Local Government interested in working collaboratively with other Local Governments?

All Local Governments that responded to the survey were interested in working collaboratively with other Local Governments. Some Local Governments have an interest in working with others on strategies alone, some on projects alone and others on both strategies and projects which include:

- Regional Destination Marketing, Major Arts and Events Projects
- Network to share ideas, issues, strategies
- Cooperative marketing for regional tourism
- Collaborative decision making
- Branding
- Promotion

10. What tools/guidance/support would assist your Local Government in developing tourism within your Local Government?

Local Governments reported a range of responses some of which linked to their concerns around developing tourism. Tools/guidance and support required by Local Government is categorised under the following themes:

- Collaboration
- Strategies
- Development of private investment
- Assistance with marketing and events development
- Education and training
- Funding
- Robust visitor numbers

Does your Local Government have any further comments?

These comments reinforce what has been said in previous questions.

Research limitations

This research is based on those Local Governments that responded to Local Government surveys distributed by WALGA and does not reflect the views of those Local Governments that did not provide feedback; however with support from the backdrop to this paper, the sample size was substantial enough to determine where the sector requires support.

11.1 Local Government tourism benefits and challenges

Local Governments' involvement in tourism is varied; with limited Local Government resources and funding those Local Governments that reap economic benefits from tourism will have more of an interest in its development, which is logical. For some Local Governments, tourism may take on the involvement of providing a gateway to a destination or signage alone, while for other Local Governments it will involve a raft of infrastructure, amenities and attractions.

Local governments have identified challenges and request for support from WALGA and other stakeholders in tourism. Those Local Governments with an interest in developing tourism will be supported by this paper's recommendations; meanwhile, for those Local Governments not wanting to develop tourism it is imperative to examine the rationale for this decision – which may be valid, and its potential consequences, as well as determining how tourism may affect a particular Local Government given the current economic situation including supply and demand of tourism to neighbouring Local Government areas. Tourism for those Local Governments without an interest in its development may take on the form of how they respond to tourism development around them, or within a network.

Tourism benefits as well as negative attributes can be tangible or non-tangible. Non-tangible benefits include contribution to a vibrant and liveable place as well as maintenance and development benefits.

The negative attributes of tourism which include congestion and a sense of hostility towards tourists – due to noise and land-use planning and environmental concerns. The current situation of Airbnb is proving a challenge to regulate. As discussed, tourism has an effect on many different industries and its impact is far reaching. There are many external factors of influence on tourism including the global, National, State and economies, political environments and other external variables which can significantly affect tourism.

In WA some Local Governments are confronted with the diminishing resources sector. This is impacting on hotel room occupancy and charges throughout WA. Those destinations that rely heavily on resources are now looking at other ways of developing their economies. With tourism as an option and opportunity, it also comes with it set-backs – the need for access, accommodation, amenity and attraction to support potential visitors.

To support the potential growth in WA's forecast tourism economy and leverage on WA's strengths, managing tourism - including education, effective planning, delivery and the ability to anticipate and react to change through all stakeholders working in collaboration, in the very fluid context in which tourism operates is fundamental to effective tourism management.

12 SWOT

This SWOT analysis was used to assist in developing the recommendations of this report and may be used as further points for discussion.

12.1 Strengths

- Natural attractions
- Attractions – ecotourism potentials
- Using what already exists, instead of creating
- Potential for links and collaboration through tourism strategies that have been/ are being developed.
- Sharing of resources in tourism development
- Potential for coordination to align Local Government efforts and minimise duplication in strategy and delivery
- A wealth of already established tools and industry knowledge to contribute the Local Government requests for future roles of WALGA and Local Government in the WALGA survey
- Established road networks and infrastructure
- The State's aviation plan including airport redevelopment – Perth and Busselton
- Visitor centre sustainability funding

12.2 Weaknesses

- Perceived LG lack of support from State Government
- Lack of coordination and collaboration between LG and State, RTOs, LTOs at strategic and operational levels
- Lack of funding for tourism development and maintenance of amenities
- Potential to develop strategies that cannot be realised resulting from lack of resources and/or funding
- Diverse range of Local Government interests that need to be addressed – flexible models to suit different situations
- Lack of education at all levels within Local Government - education and training in tourism and marketing and events within tourism
- State expectations for Local Government require clarity
- Lack of visitor numbers to support development in some Local Governments – transient populations
- Mining centres and sustainability issues
- Need for a stronger focus on heritage and environmental issues

12.3 Opportunities

- Trends at a global level and within Australia indicate tourism is a key growth area
- Close to Asia and China – leading the market in visitation
- Cheap flights to Australia with low cost carriers
- Regional investment Blueprints and RDC tourism strategies (if in place) may act as a foundation for LG strategies
- Haeberlin Report has analysed and identified issues as well as recommendations
- Visitor centre sustainability funding through Royalties for Regions
- Growth in international markets
- Royalties for Regions funding potential
- Cruise shipping, Caravans and Camping and other State strategies for Local Government involvement
- Utilise National and State Tourism Strategies and Tourism WA cornerstones which can be shaped to assist Local Governments and communities
- Promoting journeys rather than destinations provides opportunity for collaboration
- Leveraging new technologies – e.g. smart phone Apps
- Tourism research available
- Large amount of resources available for Local Government tourism education
- Courses available through Tourism Council for tourism education
- Tourism funding opportunities

- Involvement in the agenda and shaping emerging from Destination Perth

- Leveraging of state and federal government partnerships and funding to support local government activities and investment in tourism.

- The leveraging of partners (Tourism WA and Tourism Australia) to get local stories and tourism product promoted through their marketing activities.

12.4 Threats

- Lack of clarity/disparity over which State agencies provide leadership in tourism
- Dynamic and transient nature of the industry ensues an urgency to initiate actions –'strike while the iron is hot' and Local Governments may not have the capacity
- With tourism growth investment and infrastructure are required to support growth and affects Local Government in terms of – LG funding, planning approvals
- Increase in outbound international travel – particularly in WA where direct competition with SE Asia which compromises intrastate travel
- Slow interstate domestic market
- The downturn of many different industries factors have the capability to impact on tourism
- Limitations around private investment
- Aviation capacity needs to increase
- Slow domestic visitor growth
- Imitations in funding around visitor servicing
- Accommodation shortages and variants
- Skills shortage due to the mining boom
- Land-use planning issues – for example proliferation of Airbnb and other small tourism operators which may fragment tourist experience.
- Slowing down of the resources sector which impacts on accommodation and community need to develop other industries.

13 Recommendations

WALGA has assessed the needs of member Local Governments while considering the scope in which tourism operates. Through WALGA's consultation process, Tourism WA has formally indicated support for WALGA's initiative and is interested in working collaboratively with WALGA and Local Governments. The recommendations of this paper are:

WALGA to work with the Tourism Western Australia specifically to:

a. develop a Local Government Tourism Strategy to deliver local tourism outcomes
b. investigate the development of resources including a destination marketing management toolkit
c. investigate tourism education and training options for Local Government;
d. improve current Local Government tourism data collection including visitor numbers and visitor activities and marketing
e. identify funding opportunities for metropolitan and urban growth corridors to deliver tourism outcomes.

2. WALGA to work with the nine Regional Development Commissions to:

a. Advocate to the Minister for Regional Development for funding to implement the Regional Development Commission Investment Blueprints
b. Undertake a desktop audit of tourism organisations within respective Development Commissions to facilitate better strategic planning between tourism organisations and Local Government.
c. Establish a centralised and coordinated network of tourism organisations

3. WALGA President to consider establishing a Policy Forum on Tourism, to allow the Association and Local Governments to identify, consider and respond to commonly shared issues relating to tourism development, decision making and infrastructure investment.

APPENDIX
Tourism Charts and Data

Tourism Regional Boundaries
Current as at 1 JULY 2010

Experience Perth	
Armadale, City of	-
Bassendean, Town of	-
Bayswater, City of	-
Belmont, City of	-
Beverley, Shire of	WDC
Boddington, Shire of	PEEL
Brookton, Shire of	WDC
Cambridge, Town of	-
Canning, City of	-
Chittering, Shire of	-
Claremont, Town of	WDC
Cockburn, City of	-
Cottesloe, Town of	-
East Fremantle, Town of	-
Fremantle, City of	-
Gingin, Shire of	WDC
Goomalling, Shire of	WDC
Gosnells, City of	-
Joondalup, City of	-
Kalamunda, Shire of	-
Kwinana, Town of	-
Mandurah, City of	PEEL
Melville, City of	-
Mosman Park, Town of	-
Mundaring, Shire of	-
Murray, Shire of	PEEL
Nedlands, City of	-
Northam, Shire of	WDC
Northam, Town of	WDC
Peppermint Grove, Shire of	-
Perth, City of	-
Rockingham, City of	-
Serpentine-Jarrahdale, Shire of	PEEL
South Perth, City of	-
Stirling, City of	-
Subiaco, City of	-
Swan, City of	-
Toodyay, Shire of	WDC
Victoria Park, Town of	-
Victoria Plains, Shire of	WDC
Vincent, Town of	-
Wandering, Shire of	-
Wanneroo, City of	-
Waroona, Shire of	PEEL
York, Shire of	WDC

Australia's Golden Outback	
Bruce Rock, Shire of	WDC
Coolgardie, Shire of	GEDC
Corrigin, Shire of	WDC
Cuballing, Shire of	WDC
Cue, Shire of	MWDC
Cunderdin, Shire of	WDC
Dalwallinu, Shire of	WDC
Dowerin, Shire of	WDC
Dumbleyung, Shire of	WDC
Dundas, Shire of	GEDC
Esperance, Shire of	GEDC
Kalgoorlie-Boulder, City of	GEDC
Kellerberrin, Shire of	WDC
Kondinin, Shire of	WDC
Koorda, Shire of	WDC
Kulin, Shire of	WDC
Lake Grace, Shire of	WDC
Laverton, Shire of	GEDC
Leonora, Shire of	GEDC
Meekatharra, Shire of	MWDC
Menzies, Shire of	GEDC
Merredin, Shire of	WDC
Moora, Shire of	WDC
Morawa, Shire of	MWDC
Mount Magnet, Shire of	MWDC
Mount Marshall, Shire of	WDC
Mukinbudin, Shire of	WDC
Murchison, Shire of	MWDC
Narembeen, Shire of	WDC
Narrogin, Shire of	WDC
Narrogin, Town of	WDC
Ngaanyatjarraku, Shire of	GEDC
Nungarin, Shire of	WDC
Perenjori, Shire of	MWDC
Pingelly, Shire of	WDC
Quairading, Shire of	WDC
Ravensthorpe, Shire of	GEDC
Sandstone, Shire of	MWDC
Tammin, Shire of	WDC
Trayning, Shire of	WDC
Upper Gascoyne, Shire of	GDC
Wagin, Shire of	WDC
West Arthur, Shire of	WDC
Westonia, Shire of	WDC
Wickepin, Shire of	WDC
Williams, Shire of	WDC
Wiluna, Shire of	MWDC
Wongan-Ballidu, Shire of	WDC
Wyalkatchem, Shire of	MWDC
Yalgoo, Shire of	MWDC
Yilgarn, Shire of	WDC

Australia's South West	
Albany, City of	GSDC
Augusta-Margaret River, Shire of	SWDC
Boyup Brook, Shire of	SWDC
Bridgetown-Greenbushes, Shire of	SWDC
Broomehill-Tambellup, Shire of	GSDC
Bunbury, City of	SWDC
Busselton, Shire of	SWDC
Capel, Shire of	SWDC
Collie, Shire of	SWDC
Cranbrook, Shire of	GSDC
Dardanup, Shire of	SWDC
Denmark, Shire of	GSDC
Donnybrook-Balingup, Shire of	SWDC
Gnowangerup, Shire of	GSDC
Harvey, Shire of	SWDC
Jerramungup, Shire of	GSDC
Katanning, Shire of	GSDC
Kent, Shire of	GSDC
Kojonup, Shire of	GSDC
Manjimup, Shire of	SWDC
Nannup, Shire of	SWDC
Plantagenet, Shire of	GSDC
Woodanilling, Shire of	GSDC

Australia's Coral Coast	
Carnamah, Shire of	MWDC
Carnarvon, Shire of	GDC
Chapman Valley, Shire of	MWDC
Coorow, Shire of	MWDC
Dandaragan, Shire of	WDC
Exmouth, Shire of	GDC
Geraldton – Greenough, City of	MWDC
Irwin, Shire of	MWDC
Mingenew, Shire of	MWDC
Mullewa, Shire of	MWDC
Northampton, Shire of	MWDC
Shark Bay, Shire of	GDC
Three Springs, Shire of	MWDC

Australia's North West	
Ashburton, Shire of	PDC
Broome, Shire of	KDC
Derby-West Kimberley, Shire of	KDC
East Pilbara, Shire of	PDC
Halls Creek, Shire of	KDC
Port Hedland, Town of	PDC
Roebourne, Shire of	PDC
Wyndham-East Kimberley, Shire of	KDC

Gascoyne Development Commission (GDC)
Goldfields Esperance Development Commission (GEDC)
Great Southern Development Commission (GSDC)
Kimberley Development Commission (KDC)
Mid West Development Commission (MWDC)
Peel Development Commission (PEEL)
Pilbara Development Commission (PDC)
South West Development Commission (SWDC)
Wheatbelt Development Commission (WDC)

Figure 14 – Tourism regional boundaries and Local Governments, Source: Tourism WA

Region	Category	Year ending September 2010	Year ending September 2011	Year ending September 2012	Year ending September 2013	Year ending September 2014
Perth	Domestic Overnight	2,068	2,056	2,422	2,754	2,694
Perth	Domestic Day Trips	796	867	899	1,085	1,027
Perth	International	1,603	1,597	1,904	1,867	1,971
Perth	**Total**	**4,467**	**4,519**	**5,225**	**5,705**	**5,692**
Golden Outback	Domestic Overnight	337	289	381	342	297
Golden Outback	Domestic Day Trips	60	51	83	73	94
Golden Outback	International	27	44	54	53	50
Golden Outback	**Total**	**424**	**385**	**517**	**468**	**441**
North West	Domestic Overnight	609	676	718	614	1,258
North West	Domestic Day Trips	34	37	np	np	42
North West	International	101	72	122	118	120
North West	**Total**	**743**	**785**	**893**	**779**	**1,420**
South West	Domestic Overnight	827	896	1,001	1,037	1,180
South West	Domestic Day Trips	281	326	341	372	313
South West	International	96	106	99	114	136
South West	**Total**	**1,204**	**1,327**	**1,441**	**1,523**	**1,629**
Coral Coast	Domestic Overnight	372	422	457	455	486
Coral Coast	Domestic Day Trips	70	73	75	81	84
Coral Coast	International	53	67	56	73	75
Coral Coast	**Total**	**496**	**561**	**589**	**609**	**644**
Transit, Unknown & Offshore and Migratory WA	Domestic Overnight	np	np	np	np	np
Transit, Unknown & Offshore and Migratory WA	Domestic Day Trips	np	np	np	np	np
Transit, Unknown & Offshore and Migratory WA	International	5	1	np	np	np
Transit, Unknown & Offshore and Migratory WA	**Total**	**28**	**23**	**30**	**65**	**np**
Total	Domestic Overnight	4,234	4,359	5,004	5,265	5,941
Total	Domestic Day Trips	1,242	1,354	1,451	1,658	1,561
Total	International	1,885	1,887	2,239	2,226	2,352
Total	**Total**	**7,361**	**7,600**	**8,694**	**9,148**	**9,854**

Figure 15 - Regional Expenditure, Source: Tourism Research Australia
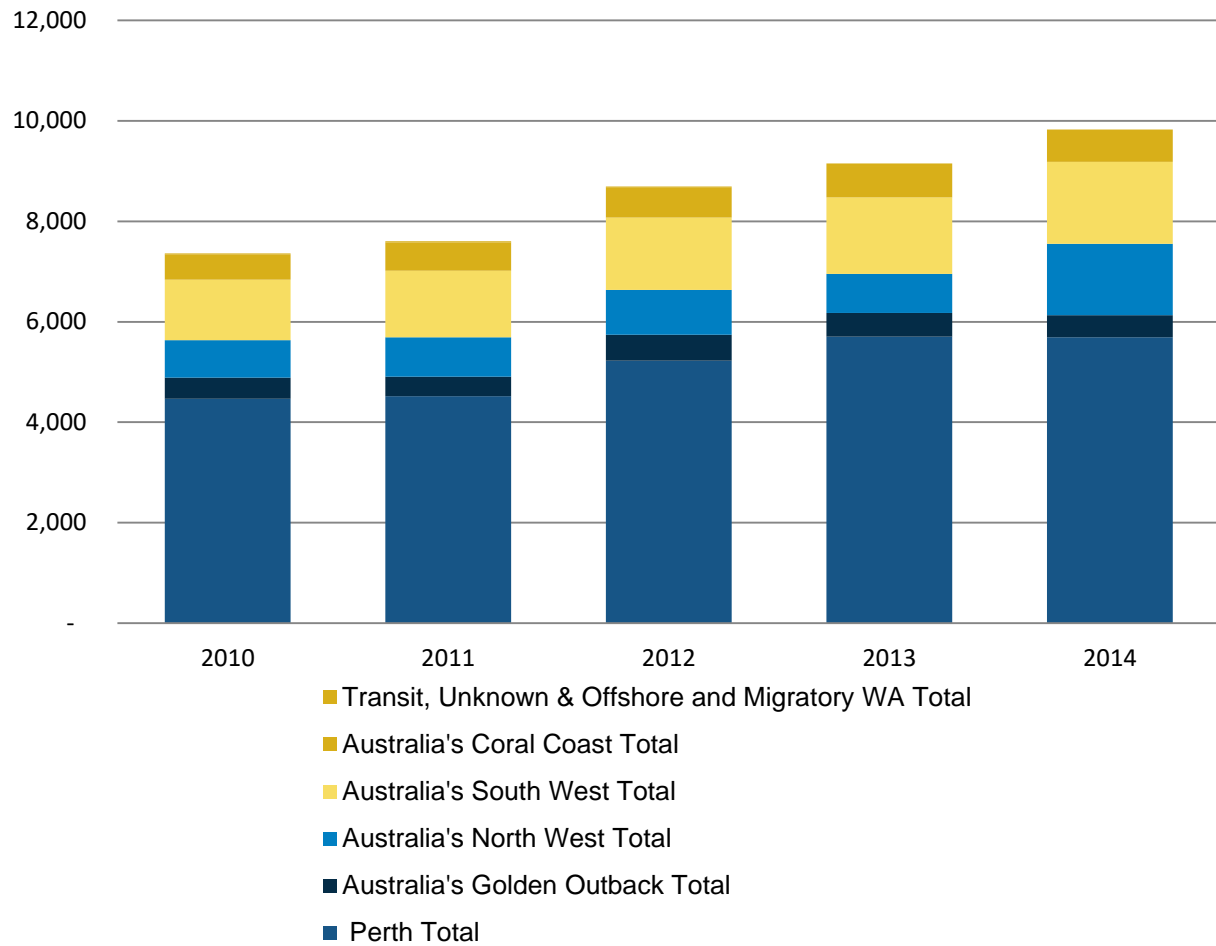
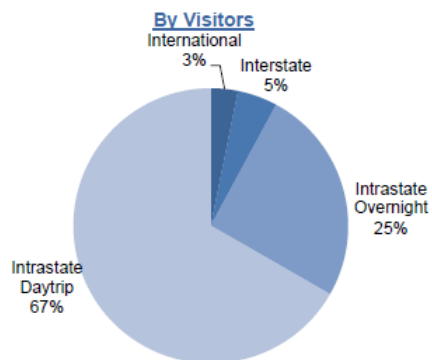**Figure 16 – WA Regional Expenditure, Source: Tourism Research Australia**

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Key Stats

- $8,887 million in spend
- 8.7 million overnight visitors
- 17.5 million daytrips
- 65.9 million visitor nights
- 7.6 night average length of stay

Market Share

- 10.7% of visitor spend in Australia
- 10.5% of visitors to/in Australia
- 12.1% of visitor nights in Australia

Source Markets

By Visitors

International 3%
Interstate 5%
Intrastate Overnight 25%
Intrastate Daytrip 67%

Purpose of Visit

	Visitors ('000)
Holiday	11,120
VFR	8,077
Business	4,185
Other	3,110

Visitor Dispersal

Australia's North West 6%
Australia's Coral Coast 7%
Australia's Golden Outback 7%
Experience Perth 62%
Australia's South West 20%
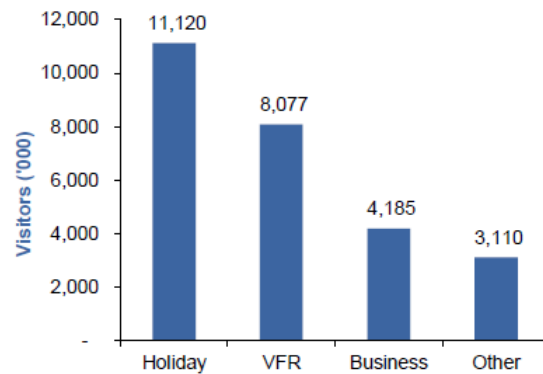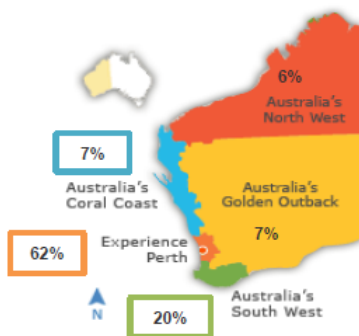
Figure 17 – Total Visitors to WA, Year Ending March 2015, Source: Tourism WA

Key Stats
- $6,923 million in spend
- 8.730 million visitors
- 65.924 million visitor nights
- 7.6 night average length of stay
- $105 average spend per night
- $793 average spend per visitor

Market Share
- 10.7% of overnight visitor spend in Australia
- 9.7% of overnight visitors in Australia
- 12.1% of visitor nights in Australia

Source Markets

By Visitors

International 10%
Interstate 14%
Intrastate Overnight 76%

Purpose of Visit

	Visitors ('000)
Holiday	3,302
VFR	2,848
Business	2,210
Other	633

Visitor Dispersal

- 13% Australia's North West
- 10% Australia's Coral Coast
- 10% Australia's Golden Outback
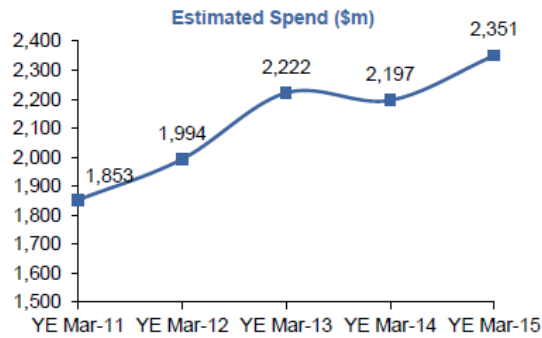- 48% Experience Perth
- 27% Australia's South West

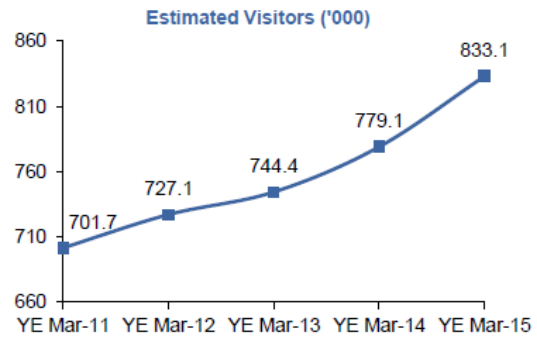*Figure 18 - Overnight Visitors, Year Ending March 2015, Source: Tourism WA*

Spend   (+) 7.0%

- $2,351 million in spend
- $2,822 average spend per visitor
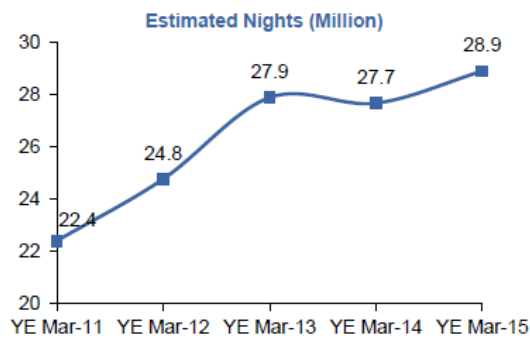- $81 average spend per night
- 11.5% of international spend in Australia

Estimated Spend ($m)

YE Mar-11	YE Mar-12	YE Mar-13	YE Mar-14	YE Mar-15
1,853	1,994	2,222	2,197	2,351

Visitors   (+) 6.9%

- 833,100 visitors
- 12.8% of international visitors to Australia

Estimated Visitors ('000)

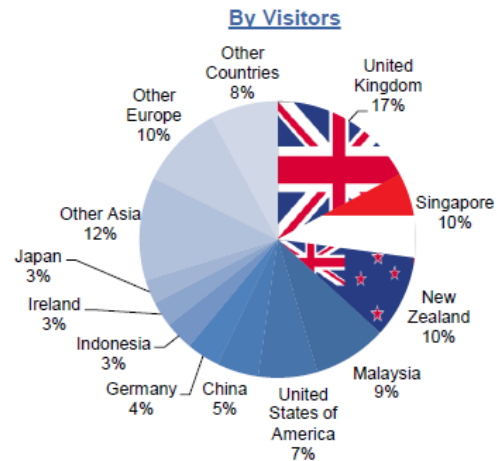| YE Mar-11	YE Mar-12	YE Mar-13	YE Mar-14	YE Mar-15
701.7	727.1	744.4	779.1	833.1

Visitor Nights   (+) 4.4%

- 28.9 million nights
- 34.7 nights on average
- 12.5% of international visitor nights in Australia

Estimated Nights (Million)

YE Mar-11	YE Mar-12	YE Mar-13	YE Mar-14	YE Mar-15
22.4	24.8	27.9	27.7	28.9

Source Markets

By Visitors

- Other Countries 8%
- United Kingdom 17%
- Other Europe 10%
- Singapore 10%
- Other Asia 12%
- New Zealand 10%
- Japan 3%
- Ireland 3%
- Indonesia 3%
- Malaysia 9%
- Germany 4%
- China 5%
- United States of America 7%

Purpose of Visit

Visitors ('000) — YE Mar-14, YE Mar-15

- Holiday +10.8%
- VFR +5.6%
- Business -9.2%
- Other +1.6%

Visitor Dispersal

- Australia's North West 9%
- Australia's Coral Coast 7%
- Australia's Golden Outback 5%
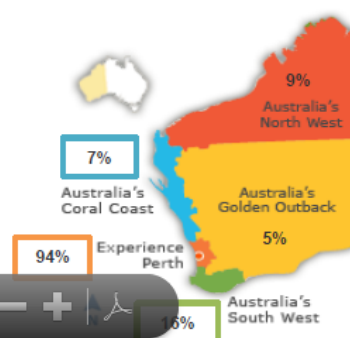- Experience Perth 94%
- Australia's South West 16%

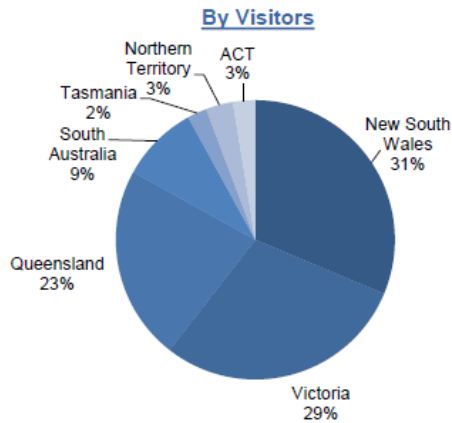***Figure 19 - International Visitors, Year Ending March 2015, Source: Tourism WA***

Key Stats

- $1,383 million in spend
- 1.238 million visitors
- 11.087 million visitor nights
- 9.0 night average length of stay
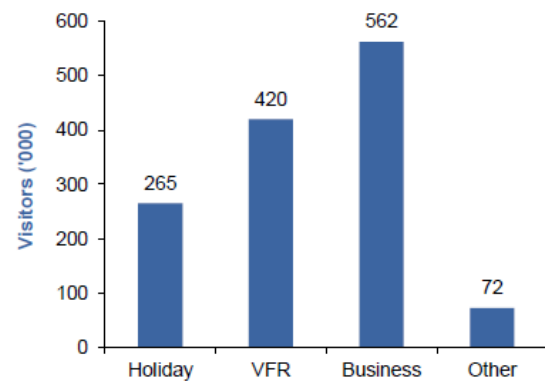- $125 average spend per night
- $1,118 average spend per visitor

Market Share

- 6.5% of interstate spend in Australia
- 4.7% of interstate visitors in Australia
- 8.2% of interstate nights in Australia

Source Markets

By Visitors

- New South Wales 31%
- Victoria 29%
- Queensland 23%
- South Australia 9%
- Tasmania 2%
- Northern Territory 3%
- ACT 3%

Purpose of Visit

Holiday	VFR	Business	Other
265	420	562	72

Visitor Dispersal

- Australia's North West 22%
- Australia's Coral Coast 5%
- Australia's Golden Outback 7%
- Experience Perth 76%
- Australia's South West 11%

Figure 20 - Interstate Visitors, Year Ending March 2015, Source: Tourism WA

Key Stats

- $3,188 million in spend
- 6.659 million visitors
- 25.940 million visitor nights
- 3.9 night average length of stay
- $123 average spend per night
- $479 average spend per visitor

Market Share

- 14.0% of intrastate spend in Australia
- 11.6% of intrastate visitors in Australia
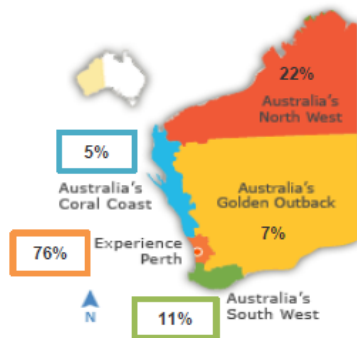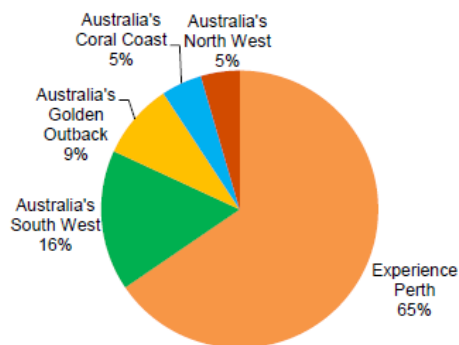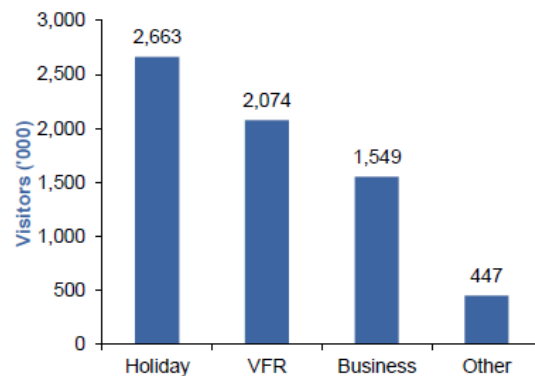- 14.7% of intrastate nights in Australia

Source Markets

By Visitors

- Australia's Coral Coast 5%
- Australia's North West 5%
- Australia's Golden Outback 9%
- Australia's South West 16%
- Experience Perth 65%

Purpose of Visit

	Visitors ('000)
Holiday	2,663
VFR	2,074
Business	1,549
Other	447

Visitor Dispersal

- Australia's North West 12%
- Australia's Coral Coast 11%
- Australia's Golden Outback 10%
- Experience Perth 37%
- Australia's South West 31%
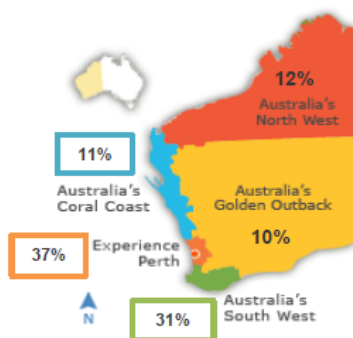
Figure 21 - Intrastate Overnight, Year Ending March 2015, Source: Tourism WA

Key Stats

- $1,964 million in spend
- 17.499 million visitors
- $112 average spend per visitor

Market Share

- 10.6% of intrastate daytrip spend in Australia
- 11.0% of intrastate daytrip visitors in Australia

Source Markets

By Visitors

Australia's Coral Coast 2%
Australia's North West 2%
Australia's Golden Outback 5%
Australia's South West 17%
Experience Perth 74%

Purpose of Visit

Category	Visitors ('000)
Holiday	7,818
VFR	5,229
Business	1,975
Other	2,477

Visitor Dispersal

Australia's North West 2%
Australia's Coral Coast 5%
Australia's Golden Outback 6%
Experience Perth 69%
Australia's South West 17%

Figure 22 - Intrastate Daytrip, Year Ending March 2015, Source: Tourism WA