

WESTERN AUSTRALIA TOURISM INVESTMENT INSIGHTS



Tourism
WESTERN AUSTRALIA

WESTERN
AUSTRALIA
WALKING ON A DREAM

📍 PERTH CITY | BOORLOO

ACKNOWLEDGMENT OF COUNTRY

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

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

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





WESTERN AUSTRALIA

WALKING ON A DREAM

STEP OUTSIDE OF THE EVERYDAY AND INTO A DREAM.
A PLACE WHERE REALITY AND THE OTHERWORLDLY COMBINE.

Just like a dream, sometimes everything is quite real, sometimes truly magical.
This is a place of natural wonders, supernatural contrasts and rare experiences.

A truly wondrous and dreamlike place to explore.

WESTERNAUSTRALIA.COM

♀ PERTH CITY | BOORLOO

WESTERN AUSTRALIA IS BIG, BEAUTIFUL AND BILLIONS OF YEARS IN THE MAKING

One of the largest states in the world, Western Australia is a land of natural wonders and riches. Home to the world's oldest continuous culture, supernatural contrasts of colour and landscapes, an incredible diversity of flora and fauna and rare experiences, many found nowhere else on the planet.

Situated in the world's most populous time zone (WST/GMT +8 hours), Western Australia's capital city Perth is closer to 17 of the largest cities in Asia than Australian East Coast Capitals of Brisbane, Sydney, and Melbourne and is the natural entry point to Australia for the majority of the world's population. Perth is also the only Australian city with direct flights to Europe including the major hubs of London, Rome and Paris.

Western Australia's diverse and unique experiences, along with its proximity to major markets and outstanding connectivity, attracts millions of visitors from across Australia and around the world each year. In the year ending December 2023, Western Australia welcomed **11.9 million overnight visitors**, generating a spend of **A\$17.7 billion**.

Significant investment in the past decade in a new waterfront precinct, sporting, entertainment and museum infrastructure, airport redevelopment and a plethora of high-quality hotels has transformed Perth into a vibrant, sophisticated city with a flourishing entertainment, events, retail, restaurant and small bar scene. It is also the only capital in Australia where you can experience beaches, wineries, national parks and an island playground — home to the friendly Quokka — all in a day.

Western Australia offers an attractive, unique and exciting investment proposition. Opportunities for investors to share in Western Australia's thriving tourism industry are available, with the Western Australian State Government, through Tourism Western Australia (Tourism WA), supporting investment into key tourism destinations.



ECONOMIC OVERVIEW

AUSTRALIAN ECONOMY

Australia's reputation as an open, prosperous, and innovative economy makes it a leading and attractive destination for global business.

A\$1.35 TRILLION
Gross Domestic Product (GDP) 2023

(Source: Department of Foreign Affairs and Trade, CY 2023)

9TH largest stock market in the world (2021).

(Source: Department of Foreign Affairs and Trade, CY 2022)*

*2022 was the last publication of the Australian Economy Highlights Report

12TH largest economy in the world.

(Source: Department of Foreign Affairs and Trade, CY 2023)

4TH country in Asia-Pacific region for Economic Freedom (2023)

(Source: CY 2023 Heritage Foundation Index of Economic Freedom)

WESTERN AUSTRALIA ECONOMY

The Western Australian economy grew twice the pace of the national economy in CY 2023 and is a healthy, safe and secure environment to live and invest.

A\$445.3 BILLION | **17.4%**
Gross State Product (GSP) in FY 2022-23 | of Australia's GDP

(Source: Western Australia Economic Profile - December 2023)

2.88 MILLION | **3.6%[↑]** | **1.4%[↑]** | **4.1%[↑]**
Population in FY 2022-23 | Perth metro area increase in FY 2022-23 | Regional WA increase in FY 2022-23 | forecast growth by FY 2024-25

(Source: Western Australia Economic Profile - December 2023 and Australian Bureau of Statistics- Regional population)

(Source: Western Australia Economic Profile - December 2023)

A\$157,390 | **62%**
GSP per capita in FY 2022-23 | above the national figure

(Source: Western Australia Economic Profile - December 2023)

WESTERN AUSTRALIA – TOURISM SNAPSHOT

A\$13.2 BILLION
GSP in FY 2022-23

A\$11.9 BILLION
Gross Value Added (GVA) in FY 2022-23

2.8%
of Western Australia's
total GVA

A\$958 MILLION
Contribution from international
visitors in FY 2022-23

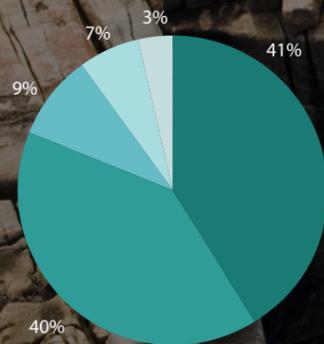
16%
of direct GVA

110,800
Total tourism filled jobs in
FY 2022-23

6.8%
of total jobs in
Western Australia

PURPOSE OF VISIT TO WESTERN AUSTRALIA (YE DECEMBER 2023)

(INTERNATIONAL MARKETS)
(Source: Tourism Western Australia)

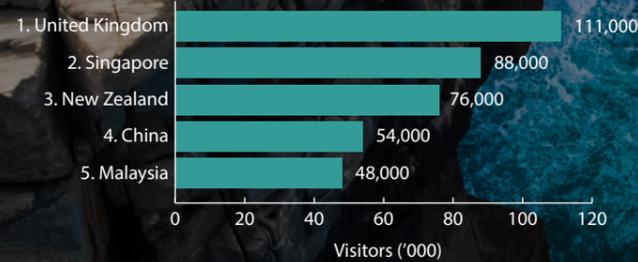


- Holiday
- Visiting Friends and Relatives (VFR)
- Business
- Employment
- Education

*Closest approximate percentage number has been used

TOP INTERNATIONAL MARKETS AND SPEND (YE DECEMBER 2023)

(Source: Tourism Western Australia)



WESTERN AUSTRALIA VISITATION AND SPEND (YE DECEMBER 2023)

11.9 MILLION
Visitors

78.2 MILLION
Visitor nights

4%[↑]
growth from CY 2019

A\$17.7 BILLION
Expenditure

31%[↑]
growth from CY 2019

(Source: Tourism Western Australia)

ACCOMMODATION MARKET INDICATORS (FY 2022-23)

LOCATIONS	OCCUPANCY (%)	AVERAGE DAILY RATE (ADR) (A\$)	REVENUE PER AVAILABLE ROOM (REVPAR) (A\$)
WESTERN AUSTRALIA (PERTH)	72.2% (74.2%)	\$219.41 (\$216.69)	\$158.49 (\$160.73)
AUSTRALIAN CAPITAL TERRITORY	70.7%	\$206.45	\$146.00
NEW SOUTH WALES	70.3%	\$251.98	\$177.09
NORTHERN TERRITORY	59.2%	\$239.19	\$141.64
QUEENSLAND	68.4%	\$250.62	\$171.53
SOUTH AUSTRALIA	69.1%	\$204.25	\$141.07
TASMANIA	72.3%	\$225.02	\$162.66
VICTORIA	65.9%	\$223.52	\$147.26
TOTAL AUSTRALIA	68.7%	\$237.86	\$163.43

(Source: Australian Accommodation Monitor)

WESTERN AUSTRALIA IS THRIVING

Thanks to an abundance of natural assets, science and technology innovations, world-renowned education, medical and research facilities, a skilled workforce, stable business environment and a collaborative approach to investment, Western Australia has the strongest economy in the country.

ECONOMIC AND INVESTMENT ENVIRONMENT

An economic powerhouse with a Gross State Product (GSP) of **A\$445.3 billion** in FY 2022-23, Western Australia's economy grew by 3.5 per cent in this time period, outpacing the national economy. In FY 2022-23, Western Australia accounted for 18.6 per cent of Australia's private sector investment. Business investment of **A\$53 billion** demonstrated the highest level of private investment in more than seven years and the state also saw an increase of 18 per cent in government investment.

This robust economic performance has bolstered Western Australia's attractiveness as a tourism investment destination.

WESTERN AUSTRALIA'S POPULATION GROWTH

Western Australia's booming economy is driving population growth. Perth was crowned the country's fastest growing capital city in 2022-23 with more than 81,000 people moving to Western Australia, resulting in more than 2.3 million people calling Perth home. This is a 3.6 per cent increase, which marks the largest annual change to the state's total population of 2.9 million. The state's growing population in both the Perth metropolitan area and regions has a direct benefit to the Visiting Friends and Family (VFR) market segment, increasing demand for flights, short-stay accommodation and attractions within the city and regional trips. In 2023, Perth was ranked 12th in the Economist Intelligence Unit's annual Global Liveability Index, placing third in Australia and positioning the capital city as one of the world's most desirable cities to call home.

STRONG BUSINESS AND RESOURCES SECTOR

A wealth of natural resources has made Western Australia a global centre for the resources sector, with some of the world's largest mining, oil and gas companies, including Shell, Chevron Australia, BP, Rio Tinto and BHP, having major offices in Perth. Business investment is set to grow by 12.75 per cent in FY 2023-24, driven by Western Australia's significant resources sector.

Around half of Australia's export goods originate from Western Australia each year, including minerals (mainly iron ore, lithium, gold and alumina), energy (mainly liquefied natural gas), agrifood (grains, meat and livestock, dairy, wool, horticulture and seafood products), specialised manufactured goods, and services including international students and tourists.

WESTERN AUSTRALIA'S UNIQUE INVESTMENT PROPOSITION

Whilst there are many similarities between Western Australia and the other Australian states, there are also a number of unique differences that sets it apart as a strong investment proposition.

- **Economic Resilience** — the Western Australian economy continues to outperform other Australian States, growing by 3.5 per cent in 2022-23 — the strongest rate of growth in nine years. State Final Demand is forecast to grow by 4.5 per cent in 2023-24.
- **Stable Housing Market** — the average house price in Western Australia is more affordable than in other Australian states. Western Australia also has the highest average wage, increasing housing affordability.
- **Energy Security** — Western Australia is rich with the natural resources required for a renewable energy transition, including solar and wind energy, abundant natural gas and a wealth of battery metals.
- **Export Powerhouse** — Western Australia is one of the most productive mineral and petroleum regions in the world. Western Australia's battery minerals sales have been rising sharply, supported by a rapid expansion of the electric vehicle industry.

A\$3.6 BILLION
Western Australia capital city investment in FY 2022-23

22%[↑]
from FY 2021-22

A\$53 BILLION
Private sector investment in FY 2022-23

(Source: Tourism Research Australia and Western Australian Government)

12TH most liveable capital city in the world (Perth)

3RD most liveable capital city in Australia

(Source: Economist Intelligence Unit - Global Liveability Index 2023)



BOOMING TOURISM SECTOR

Tourism is one of Western Australia's strongest economic sectors. In CY 2023, the state welcomed 11.9 million visitors, including nearly 2.5 million people visiting from interstate and overseas, contributing to the state's highest ever annual visitor spend of A\$17.7 billion.

Nearly half of this spend, or over A\$8 billion, was from visitors who travelled beyond Perth and out to Western Australia's unique regions.

Visitor nights increased in 2023 with 78.2 million, up 4 per cent from CY 2019. The average length of stay rose 5 per cent (+0.3 nights) in the same period. In CY 2023, Western Australia was the third best performing Australian state in terms of spend, with 31 per cent growth compared to the national growth of 23 per cent.

The number of international visitors to Western Australia visiting for employment reached 55,000 in CY 2023, an increase of 96 per cent compared to CY 2019 and well ahead of the national growth of 19 per cent.

In FY 2022-23, Western Australia's average hotel occupancy rate of 72.2 per cent (74.2 per cent in Perth) was stronger than the national rate of 68.7 per cent. In the same period, hotels in Western Australia produced an ADR of \$219.41 and a RevPar of \$158.49, with demonstrated growth into 2023-24.

HOW TOURISM WESTERN AUSTRALIA DRIVES DEMAND

Tourism WA actively promotes Western Australia in the domestic market and 12 key international markets including the United Kingdom, Germany / Switzerland, New Zealand, Singapore, Malaysia, Indonesia, United States of America, India, China, Hong Kong, Italy and Japan.

Tourism WA partners with airlines, travel wholesalers, retail and online travel agents, as well as Tourism Australia and Regional Tourism Organisations on domestic and international marketing campaigns to encourage more visitors to Western Australia.

A\$14.4 BILLION
Overnight spend

31%[↑]
growth from CY 2019

8%[↑]
above national growth

72.2%
hotel occupancy rate in
Western Australia in FY 2022-23

3.5%[↑]
than national occupancy
rate in FY 2022-23

(Source: Australian Accommodation Monitor)

WESTERN AUSTRALIA VISITOR ECONOMY STRATEGY 2033

Looking forward, the tourism sector has been identified by the Western Australian State Government as one of six priority sectors for development as part of its [Future State: Accelerating Diversify WA](#).

A\$530 million has been committed over the next four years to deliver targeted outcomes through the implementation of the new [Western Australia Visitor Economy Strategy 2033 \(WAVES 2033\)](#) — a 10-year roadmap for the future of the state’s visitor economy, which includes **growing visitor spend to A\$25 billion per annum by 2033**.

Developed in close consultation with the state’s tourism industry and across 14 State Government agencies, WAVES 2033 outlines a new vision for Western Australia ‘to be recognised as a world-class destination that immerses people in its unique cultures, communities, and environment’.

WAVES 2033 GOAL AREAS

Driven by the State Government’s global tourism brand ‘Walking On A Dream’, a competitive major events strategy, Western Australia’s unique Aboriginal tourism sector, and its high-performing tourism industry, WAVES 2033 outlines goal areas to achieve the A\$25 billion visitor spend per annum, including the following key initiatives:

INITIATIVES

AVIATION

Attracting new inbound aviation routes and boosting regional tourism with affordable airfares.

ACCOMMODATION & ATTRACTIONS

Attracting private sector investment in accommodation development, building the density and diversity of tourism experiences and growing Western Australia’s market share of the cruise tourism sector.

EVENTS

Developing, attracting and promoting a diverse range of events to secure Western Australia’s reputation as an always-on events destination and supporting world-class infrastructure to grow visitation.

ABORIGINAL TOURISM

Positioning Western Australia as the premier destination for Aboriginal tourism in Australia and developing the Aboriginal Cultural Centre in Perth.

DESTINATION BRAND

Enticing high-yield travellers and international students by dialling up global marketing and digital offerings.

HIGH PERFORMING INDUSTRY

Growing the tourism and hospitality workforce, harnessing innovative technologies and expanding sustainable and inclusive tourism experiences.



AVIATION

The State Government works closely with Perth Airport to develop new routes, increase capacity on existing routes and secure more non-stop flights from domestic and international locations as part of the Reconnect WA strategy, which includes **A\$75 million** dedicated to aviation development.

PERTH AIRPORT

In FY 2022-23, Perth Airport welcomed over 14 million passengers, including 3.3 million international, 5.4 million interstate and 5.5 million intrastate. According to the Bureau of Infrastructure and Transport Research Economics, in January 2024 Perth was the fourth most active airport in Australia, receiving 7 per cent of total domestic and 10 per cent of total international aircraft passenger movements.

This growth is reflective of the work that the State Government and Perth Airport have undertaken to increase aviation connections to Perth, including non-stop flights from 19 global destinations such as Bangkok, Ho Chi Minh City, Jakarta, Johannesburg, London, Paris, Rome, Guangzhou and Tokyo. Western Australia also remains the only Australian state or territory with non-stop flights from the United Kingdom (London) and Continental Europe (Rome and Paris), cementing Perth's reputation as the Western Gateway to Australia.

Perth Airport is investing A\$2.5 billion to support the consolidation of all commercial air services into the Airport Central Precinct by 2031, including expanding international facilities, developing a new terminal and airport hotel, and adding a third runway. The redevelopment will increase capacity into Perth by an additional 4.4 million seats.

In late 2022, Perth Airport's new train station opened, significantly enhancing connectivity to the Perth city centre, facilitating smoother and more efficient travel for visitors to Western Australia.

REGIONAL AVIATION CONNECTIVITY

The State Government is also focused on increasing direct international flights to regional Western Australia and recently, in partnership with Broome International Airport, secured a seasonal service from Singapore to Broome with Jetstar Asia, reducing the flying time into the region by over eight hours. Jetstar Asia's expansive partnership and networks beyond Singapore provide European and Asian visitors an alternate gateway into Western Australia, and direct access into the state's unique North West region.

The State Government, Busselton Margaret River Airport and Jetstar also secured the first interstate flights to the South West region of the state, with Jetstar now flying four-times-a-week to Busselton from Melbourne and three-times-a-week from Sydney.

The State Government recently committed an additional A\$4 million to subsidise the expansion of Western Australia's regional flight network, to improve air connectivity and access, creating significant new business and tourism opportunities for the Mid West, Pilbara and Kimberley regions.

MAP OF DIRECT AVIATION ROUTES



2.3 MILLION
International inbound seat capacity in 2023

89%[†]
growth from 2022

19
Global destinations with direct aviation connections to Perth

CRUISING

Western Australia's cruise ports are dotted along 20,000 kilometres of pristine coastline. Of the state's 11 ports, seven actively welcome visits from a range of cruise lines, providing visitors with access to incredible destinations and experiences. In FY 2024-25, cruise ships will visit Western Australia 149 times at Albany, Broome, Busselton, Esperance, Exmouth, Fremantle and Geraldton

Western Australia's mediterranean climate in the south, and tropical climate in the north also means there are cruising options all year round. The popularity of cruising in Western Australia is evidenced by the value of its 2022-23 cruise season, which injected **A\$333 million** into Western Australia's economy.

Broome and the Kimberley region is considered Australia's premier expedition cruise destination. The region will experience its largest ever expedition cruise season in 2024, including visits from Seabourn, Scenic, Ponant, Silversea, Lindblad National Geographic and Coral Expeditions, along with quality micro-cruise destinations.

The State Government continues to prioritise growth in the cruise sector following the recent launch of Tourism WA's '[Western Australian Cruise Tourism Strategic Plan 2023-2033](#)'. Priorities include cruise line attraction, cruise visit optimisation, enriching visitor experiences, developing appropriate marine infrastructure, fostering industry partnerships and supporting sustainable growth.

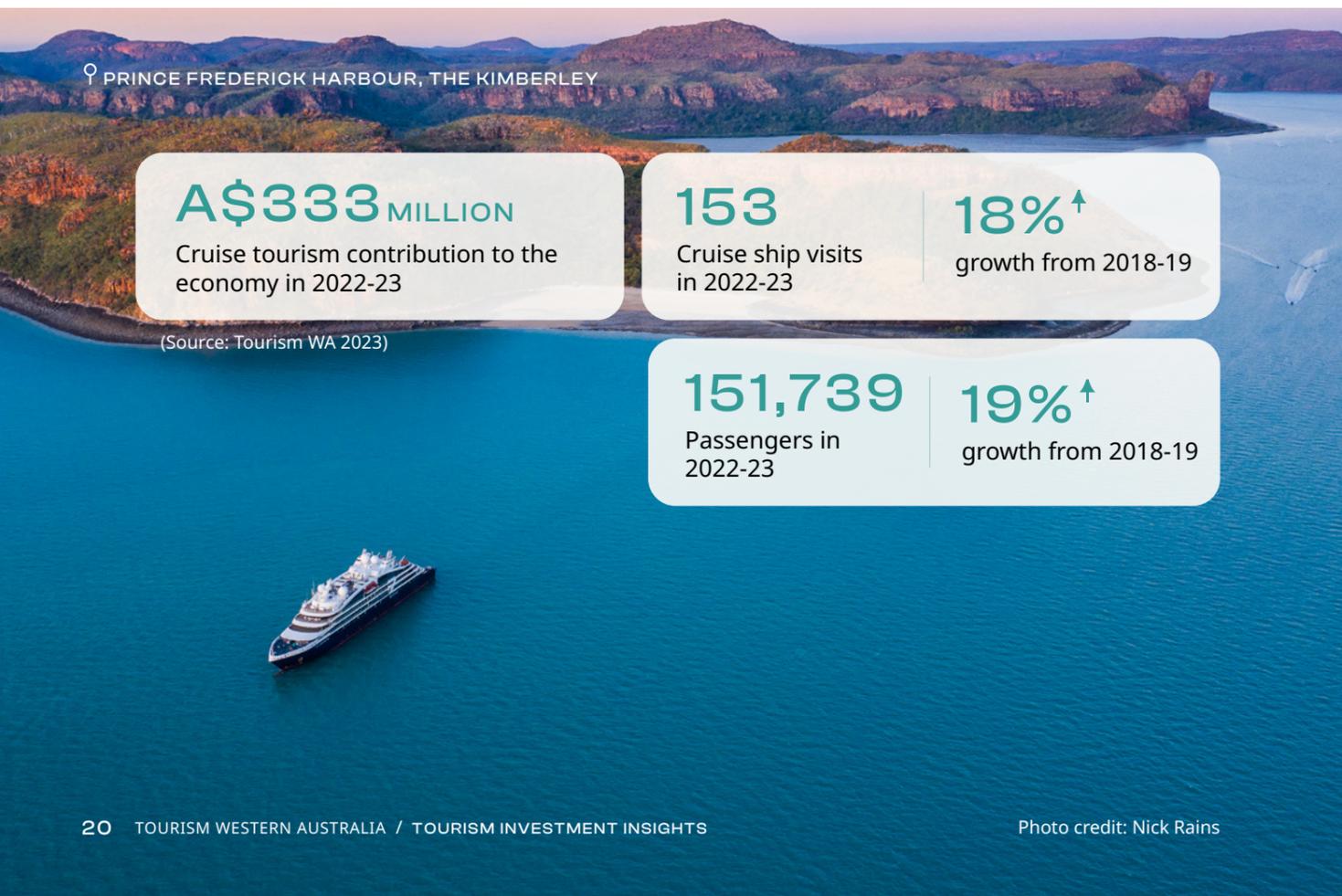
ABORIGINAL TOURISM

Aboriginal tourism is an important part of Western Australia's tourism industry, contributing **A\$63.8 million** to the State's economy. Rich, diverse and authentic Aboriginal cultural experiences give Western Australia a unique point of difference over other Australian destinations.

Tourism WA works closely with the Western Australian Indigenous Tourism Operators Council (WAITOC) and the tourism industry to develop and promote new Aboriginal tourism experiences as part of the '[Jina: Western Australian Aboriginal Tourism Action Plan 2021-2025](#)', which is supported by a **A\$20 million** Aboriginal Tourism Fund. The goal is to position WA as the nation's premier destination for authentic Aboriginal tourism, create exciting new Aboriginal tourism experiences and help to grow the number of Aboriginal people participating in the tourism industry.

Other ways the state supports the growth of authentic Aboriginal tourism experiences is through two key initiatives:

- **Camping with Custodians:** The Camping with Custodians initiative builds community-operated campgrounds on Aboriginal land where visitors have the chance to stay with traditional Aboriginal owners and experience local culture.
- **Regional Aboriginal Events Scheme:** Funding is allocated to events which deliver an authentic Aboriginal experience, through the leadership and participation of Aboriginal people.



EVENTS

Developing, attracting and promoting a year-round calendar of major sporting, arts, music, cultural and mass participation events, and a robust regional events calendar, is a priority for the State Government. Events drive demand, support Western Australia's major tourism, sport and entertainment infrastructure, and add social vibrancy to Perth and the regions.

WESTERN AUSTRALIA'S VISION FOR DREAM EVENTS

Tourism WA's [Events Visioning Document](#) centres on a vision of Perth and Western Australia becoming the fastest growing events destination in the South East Asian region. To reach this goal, the State Government is focusing on the following areas:

- **Securing Australian-exclusive content** that motivates travel, longer stays and regional dispersal.
- **Bookable blockbusters** across sports, culinary, entertainment and arts and culture.
- **Cultural events** that showcase and celebrate Western Australia's unique Aboriginal culture and experiences.

- **Culinary events** which cement the state's position as Australia's leading food and drink destination and capitalising on its world class food and wine offerings.
- **Mass Participation events** such as national and international championships that typically attract large travelling parties. The mass participation events held in FY 2022-23 alone generated close to **A\$97 million** in economic impact, over 300,000 bed nights, and an average return on investment of 13:1 (A\$).
- **Destination events** that showcase the state's stunning natural environment, including its magnificent coastline, beaches and connection to the Indian Ocean, incredible weather, forests and trails, and vast dark skies.
- **Regional events** which showcase the diversity of Western Australia's landscape, people and culture.

MEETINGS, INCENTIVES, CONFERENCES AND EVENTS (MICE)

The State Government and its industry partner, Business Events Perth, drive demand by attracting MICE travel to Perth. Business Events Perth has secured 235 business events from 1 March 2024 to December 2026 for Western Australia which are estimated to generate **A\$495.6 million** in direct delegate expenditure.

Looking forward, the proposed redevelopment of the Perth Convention and Exhibition Centre (PCEC), will significantly increase the ability to attract larger international conferences to the state. A new tourism and hospitality hub on the Perth City Waterfront will be incorporated into the redevelopment, including an outdoor theatre on the Swan River, new food and beverage venues, a premium hotel and residential apartments.

A\$181 MILLION

Events contribution to the economy in 2022-23

(Source: Tourism WA FY 2022-23)

770,000

Bed nights

250,000

Visitors, staying an average of 7.25 nights

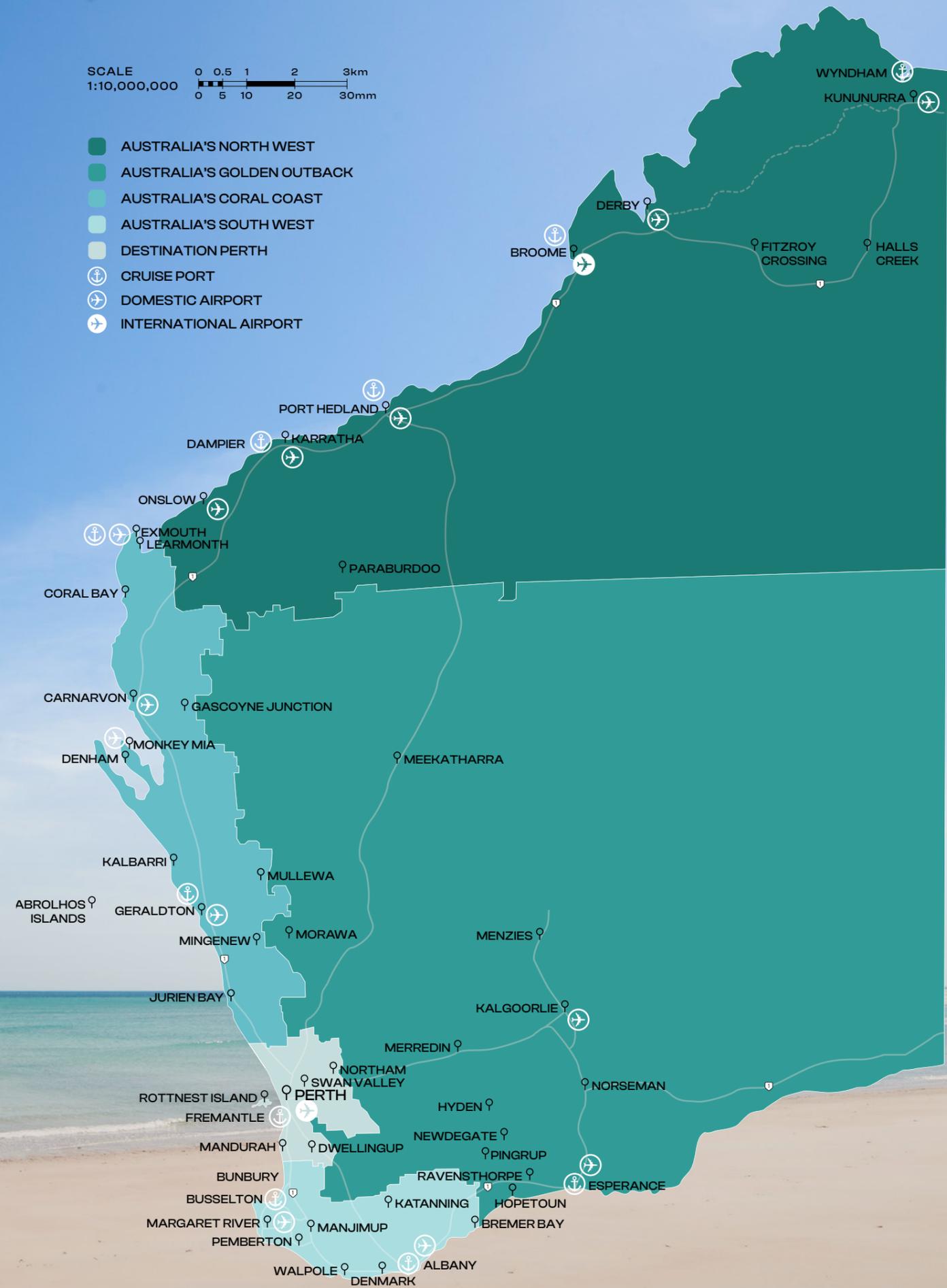
A\$257

Average daily spend



WESTERN AUSTRALIA — JOURNEY TO FIVE DIFFERENT WORLDS ALL IN THE ONE STATE

Western Australia's five tourism regions are prime for investment, featuring incredible natural beauty, world class tourism experiences and attractions.





PERTH

Perth, Australia's sunniest capital city, effortlessly blends urban cool with raw natural beauty.

Billions of dollars have been spent transforming the city in recent years. Major developments include Elizabeth Quay which links the Swan River to the Central Business District, the 60,000 seat Perth Stadium, the WA Museum Boola Bardip, and Perth Airport's redevelopment.

This transformation also includes the addition of more than 5000 hotel rooms over the past decade with the city welcoming more than 30 new hotels including the luxury Crown Towers and COMO the Treasury, along with international brands Ritz-Carlton, Westin, Hilton and Novotel.

Further growth is forecast for Perth with over 17,000 hotel rooms to be added by 2027, a 2.4 per cent growth (CAGR). Importantly, this growth is supported by a healthy RevPAR, which grew an astonishing 28 per cent between September 2022 and September 2023.

The ongoing **A\$10.5 billion** Metronet project, which provides public transport interconnectivity between regional centres, will continue to make it even easier to travel across the Perth metropolitan area. Adding 72 kilometres of new railway and rail stations, it is the largest ever investment in Perth's public transport system.

MARGARET RIVER AND THE SOUTH WEST

The Margaret River Region, located in Australia's South West, is recognised for its pristine coastline, world-class surf breaks, majestic caves, ancient old growth forests and unique wildlife.

The region is also unrivalled for its fine produce and dining, boutique breweries and distilleries, and premium wine experiences. The Margaret River Region is home to 100 cellar doors, 55 of which have been awarded a 5-star rating or above. Wine from the region is exported to over 60 markets and has an export value of **A\$32.9 million**.

Dispersed throughout the region are a mix of diverse accommodation offerings. Busselton, the region's largest town, recently welcomed a 110 room Hilton Garden Inn, located on its redeveloped foreshore and overlooking the 1.84-kilometre Busselton Jetty. The **A\$45 million** redevelopment of Busselton's town centre has provided a new level of shopping, entertainment and dining options for the region.

Saltwater Busselton, a state-of-the-art convention and performing arts centre, will open its doors in early 2025, supporting a growth in MICE travel to the region. Nestled in Busselton's commercial, cultural, and foreshore precincts, it's a mere 9 kilometres from the Busselton Margaret River Airport.

The Margaret River Region is an easy 3-hour drive from Perth. There are direct flights from Sydney and Melbourne to Busselton Margaret River Airport, and following recent upgrades, the airport is also capable of facilitating short haul international flights.

NINGALOO REEF AND THE CORAL COAST

The Australia's Coral Coast region boasts two UNESCO World Heritage-listed sites – Ningaloo Reef and Shark Bay. The Ningaloo Reef is the world's largest fringing reef, located just a few metres from the beach. Each year, over 36,000 visitors travel to the region to swim with the iconic whale sharks in Ningaloo Marine Park. There are also plenty of land-based adventures in the region, including Exmouth's Cape Range National Park, which is rich and diverse in wildlife.

Qantas flies direct from Perth to Exmouth (Learmonth Airport). By road, the 1,250-kilometre Coral Coast Highway offers a world-class road trip through unique destinations including Nambung National Park at Cervantes, the bustling city of Geraldton, Pink Lake at Hutt Lagoon, the coastal township of Kalbarri, Carnarvon, the UNESCO World Heritage Listed Shark Bay and the beautiful settlement of Coral Bay.

ESPERANCE AND THE GOLDEN OUTBACK

The Australia's Golden Outback region boasts historic townships, spectacular desert wilderness, quirky outback charm, gold-rush history and perfect white beaches.

Esperance, home to Australia's whitest beach, Lucky Bay in Cape Le Grand National Park, is so relaxing that even the kangaroos sunbathe on the sand. A short cruise away are the wildlife-rich islands of the Recherche Archipelago.

Esperance is located 700 kilometres from Perth, on an epic road trip which takes in the sights of the Wheatbelt along the way, including Wave Rock and super-sized art on the Public Silo Trail. Alternatively, Rex Airlines flies from Perth to Esperance (approximately 1.5 hours).

THE KIMBERLEY AND NORTH WEST

The Kimberley region, located in Australia's North West, is a land of breathtaking landscapes forged through billions of years of history, and is one of the world's last true wilderness areas.

The exceptional natural beauty of the UNESCO World Heritage-listed Purnululu National Park and Bungle Bungle Ranges contrasts with Broome's iconic experiences including sunset camel rides along world famous Cable Beach, dinosaur footprints and the spectacular staircase to the moon. Australia's 60,000-year Aboriginal culture is showcased in this region, where local people living on Country share their Dreamtime stories and customs.

Both Broome and Kununurra serve as gateways to the Kimberley region and can be easily accessed by air. Broome is also a major cruising port and the proposed **A\$200 million** Kimberley Marine Support Base will deliver new port infrastructure, which will provide an enhanced experience for operators and visitors.

Broome is the major hub for tourism infrastructure and accommodation in the Kimberley region, featuring a wide range of accommodation types from caravan parks to 5-star resorts, making it one of Western Australia's most popular holiday destinations with both domestic and international markets. Demand is expected to grow from international visitors with the addition of a direct Singapore to Broome flight added in 2024. Tourism WA research have shown that demand for additional visitor accommodation will continue to grow.

WESTERN AUSTRALIA'S TOURISM EXPERIENCES

Complementing Western Australia's diverse destinations are its unique tourism assets. The State Government, through Tourism WA, works closely with Traditional Owners, state, local and federal government organisations, the tourism and hospitality industry as well as the private sector organisations to maintain and sustainably develop tourism assets for locals and visitors to enjoy.



ABORIGINAL CULTURE

The rich and unique culture of Australia's Aboriginal people stretches back at least 60,000 years, making it the world's oldest continuing living culture. Across coastal, urban and outback Western Australia, more than 150 Aboriginal tourism operators proudly share their stories, cultures and lands with visitors through a variety of authentic experiences including tours, performance, art, music, food and events.

NATURE AND WILDLIFE

Western Australia's national parks, state forests and marine parks provide visitors with the opportunity to interact with some of the world's most diverse and unique flora, fauna and landscapes. The world's largest wildflower collection on earth blooms throughout the state from June to December each year, with more than 60 per cent of the 12,000 species found nowhere else on the planet. Meet the happiest marsupial on earth, the quokka on Rottnest Island, or swim with gentle whale sharks and humpbacks as well as dolphins, manta rays, sea turtles and sea lions on the Coral Coast.

five million hectares of new national and marine parks and reserves by the end of 2024.

COASTAL AND AQUATIC ADVENTURES

The waters off Western Australia's 20,000-kilometre coastline, including its myriad of islands, are some of the most pristine in the world, and home to unique marine life and adventures. Easily accessible throughout WA are uncrowded beaches of clean, soft white sands where it's easy to relax and soak up the sun, join friends for a picnic or BBQ, or dine at one of the many coastal restaurants.

FOOD AND DRINK

Western Australia's food and beverage scene is diverse and world class, ranging from sophisticated restaurants, cafes and small bars, serving up fresh local produce from the land and sea. Western Australia is home to eight distinct wine regions, including the renowned Margaret River Region and the historic Swan Valley. A growing number of award-winning breweries, distilleries and cideries are available throughout the state, along with fresh seafood and rare black truffles which are making their way onto local and international menus, and at seasonal culinary events.

ROAD TRIPS

The open roads of Western Australia offer drive journeys through dreamlike landscapes and into wondrous worlds. From adventurous 4WD tracks crossing rugged terrain, picturesque coastal highways, spectacular forest drives, outback trails through gold mining towns and unique outdoor art galleries, to iconic food and wine trails, Western Australia is a known international drive destination. Australia's largest state was made for road trips with hundreds of different routes to choose from, and plenty of accommodation and rest-stops along the way.

INCENTIVES AND SUPPORT

Western Australia has a secure and stable investment environment, demonstrated through sustained economic prosperity.

There has never been a better time to invest in tourism in Western Australia to capitalise on the state's record visitation, capital investment, excellent international access, innovative marketing and unique and diverse destinations and experiences. The Department of Jobs, Tourism, Science and Innovation has a number of programs and strategies that are designed to assist with streamlining investment in various industries, including tourism.

FUTURE STATE

The Western Australian Government has released the Future State: Accelerating Diversify WA plan to attract investment and grow trade, focusing on a select number of targeted diversification opportunities that match Western Australia's unique strengths with global trends. Future State provides a targeted, holistic, whole-of-government approach to attracting investment and growing trade opportunities that will enable Western Australian industry to become smarter, more sustainable and diversified. The government will continue to prioritise actions that will reduce barriers to economic development and create a business environment that is conducive to attracting investment into these opportunities.

The development of Western Australia's regional tourism destinations has been identified as a key goal area in Future State, and the Western Australian Government is committed to working with businesses to unlock the full potential of its tourism regions.

SIGNATURE ACCOMMODATION OPPORTUNITIES IN NATIONAL PARKS

Through the National Park Tourism Experiences Development Program, locations in some of the state's most spectacular national parks have been made available for high quality, environmentally and culturally sensitive accommodation investment opportunities.

To achieve this, Tourism WA, in partnership with state government agencies and Traditional Owners, has established an accommodation facilitation program. This program is designed to support the private sector by providing financial and technical assistance, to deliver signature and unique tourist accommodation offerings in and around Western Australia's protected areas.

The support available includes:

- Funding for planning and land assembly processes.
- Case management to streamline government processes and facilitate collaborative engagement.
- Assistance to negotiate suitable lease terms if necessary

TOURISM ATTRACTION AND EXPERIENCE FACILITATION

Investing in tourism attractions and experiences, whether big or small, requires navigating various government approvals and regulatory processes.

Tourism WA provides support to the private sector through a range of services including:

- Assisting with business case development, progression of approvals, and stakeholder engagement;
- Helping private sector operators through the various stages of planning and development of new tourism experiences and assets activating national parks; and
- Supporting and enhancing new tourism experiences by providing development workshops, tools and one-on-one coaching for tourism operators.

Tourism WA can also facilitate connections with other state and federal government agencies. If a project is assessed and identified as being of state significance, Tourism WA can direct proponents to the appropriate case management team in the Department of Jobs, Tourism, Science and Innovation to assist with navigating the various approvals processes.

INVEST AND TRADE WESTERN AUSTRALIA

Invest and Trade Western Australia assists investors and businesses with engaging with established industries, and has access to critical information that makes it easier to do business in and with Western Australia.

In addition to the Perth Hub, Invest and Trade Western Australia operates an extensive network of international offices across the ASEAN region, China, India-Gulf, North-East Asia, United Kingdom/Europe and Americas regions.

For more information on Invest and Trade Western Australia please follow this link.

Connectwithcurrent,shovelreadyopportunities across Western Australia here.

TOURISM INVESTMENT COMMITTEE OF CABINET

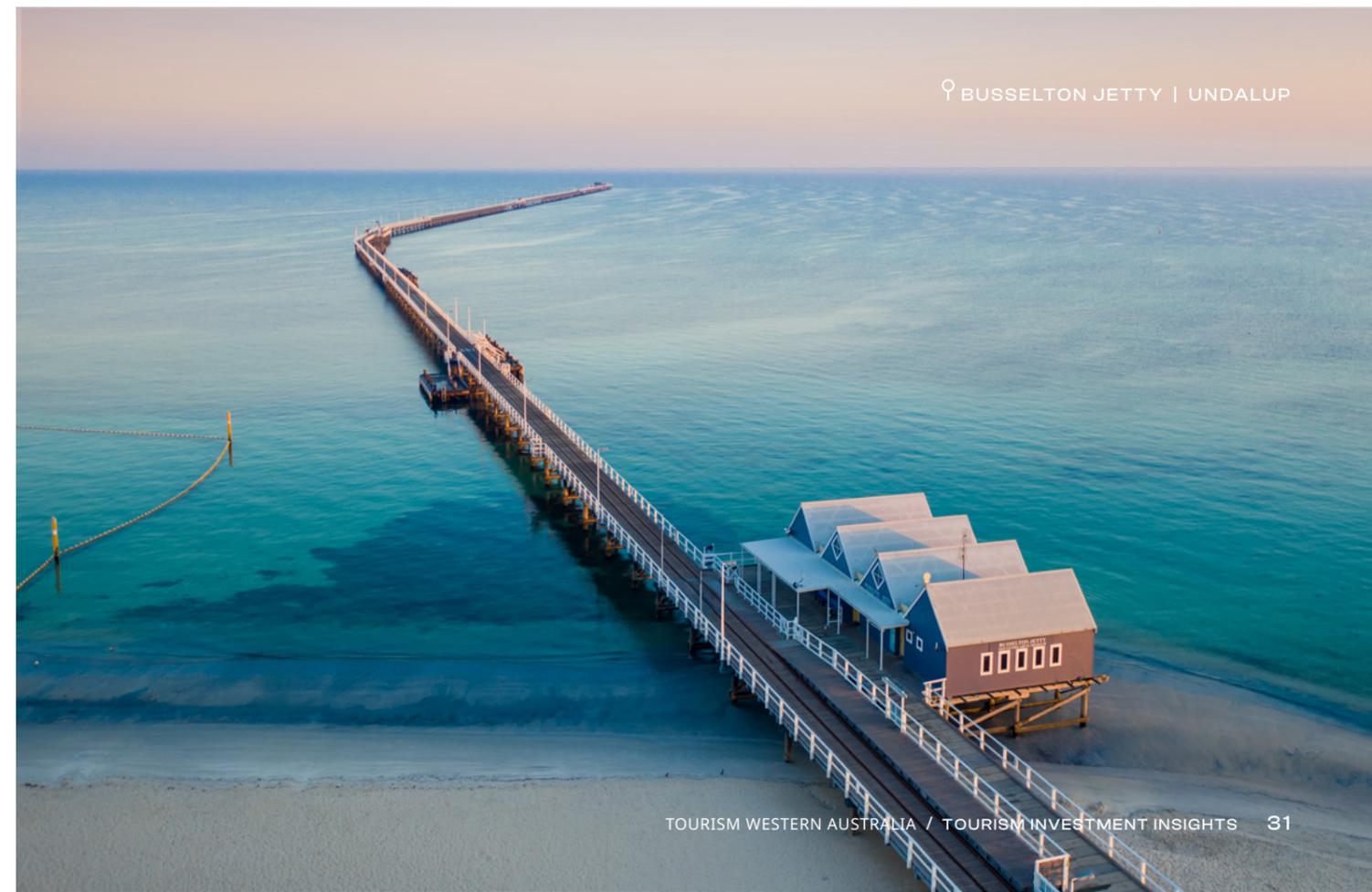
The role of the Tourism Investment Committee of Cabinet is to support the efficient and effective delivery of tourism investment in Western Australia. The key responsibilities of the TICC include:

Providing strategic guidance and oversight of all major tourism attractions and infrastructure investment proposals, including establishing key Government priorities;

Strengthening collaboration and coordination across agencies to drive timely delivery of approvals through government processes;

Identifying and removing barriers to tourism investment;

Investigating potential legislative reforms to elevate and expedite government approvals and investment decisions.



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GLOSSARY

ADR	Average Daily Rate. Calculated by dividing room revenue by rooms sold.
Bed nights	A measure of bed occupancy, rather than room occupancy/occupancy rate. Calculated by dividing the total number of beds occupied by total number of beds available.
CAGR:	Compound Annual Growth Rate.
CY	Calendar year (i.e. January – December).
Direct Flight	A flight from a traveller's origin to their final destination with one or more intermediate stops. No change in aircraft occurs.
Domestic Visitors (Intrastate)	Western Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home. Note, intra-regional travel is included, i.e. the home and stay may fall within the same region.
Domestic Visitors (Interstate)	Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home.
International Visitors	Aged 15 years and over who spent at least one night in the region and are staying in Australia for 12 months or less.
GDP	Gross Domestic Product.
GSP	Gross State Product allows easier comparisons across industries. GRP is GVA plus net taxes.
GVA	Gross Value Added allows easier comparisons across industries. GVA is the labour income and capital revenue received by the industry from tourism and the net taxes government receives from production.
Economic Freedom	The right of every human to control their own labour and property. In an economically free society, individuals are free to work, produce, consume, and invest in any way they please.
FY	Financial year (i.e. June – July).
MICE	Meetings, Incentives, Conferences, Events.
Non-stop flight	A flight that does not land in between the departure and arrival destinations.
NPTED	National Parks Tourism Experience Development program.
Occupancy rate	The percent of hotel rooms expected to be filled during a specific time period.
RTO	Regional Tourism Organisation.
RevPAR	Revenue per available room. Calculated by dividing a hotel's total room revenue by the room count and the number of days in the period being measured.
Tourism Filled jobs	Refers to all positions of employment which are currently filled as a result of WA's tourism industry. Includes secondary jobs.
VFR	Visiting friends and relatives.
Visitor economy	Includes international and domestic leisure travellers, business travel, international students studying in Australia, business and major events, people visiting friends and relatives, and those working as part of a short term stay in Australia. The visitor economy takes in all businesses that provide goods and services to this wide variety of different visitors.
Visitor nights	A measure of the total number of nights spent by overnight visitors on overnight trips.

Tourism Western Australia

Level 10, 1 William Street, PERTH WA 6000

GPO Box X2261 PERTH WA 6847

T. 08 9262 1700 F. 08 9262 1787

info@westernaustralia.com

westernaustralia.com

tourism.wa.gov.au

 Facebook:
facebook.com/extraordinarywesternaustralia

 YouTube:
youtube.com/westernaustralia

 Instagram:
Instagram.com/westernaustralia

 X:
twitter.com/westaustralia

 TikTok:
tiktok.com/westernaustralia
[#WAtheDreamState](https://tiktok.com/westernaustralia)

For more information please contact
Tourism WA on invest@westernaustralia.com



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