

Tourism Industry Leadership Review

September 2009



Australian Hotels Association
WESTERN AUSTRALIA



Tourism Industry Leadership Review SURVEY RESULTS

Part One - Tourism WA Overview

1. The following objectives are currently listed in Tourism WA's strategic plan for 2008-2013. Please prioritise/rank these objectives in terms of relevance for the industry.

	Not Important	Slightly Important	Important	Very Important	Essential
Improve the quality of visitor experiences	5.3%	2.6%	23.7%	23.7%	44.7%
Secure the future of regional tourism	0.0%	5.1%	17.9%	28.2%	48.7%
Grow visitor expenditure faster than visitor nights(numbers)	2.6%	10.5%	34.2%	36.8%	15.8%
Accelerate the development of Aboriginal tourism	0.0%	20.5%	33.3%	30.8%	15.4%
Influence major infrastructure priorities and attract private investment	0.0%	2.6%	5.1%	30.8%	61.5%
Build recognition that tourism and events enhances the unique WA lifestyle and supports the natural environment	2.6%	0.0%	15.8%	39.5%	42.1%



In addition to the objectives above, where else do you believe Tourism WA should focus their attention?

- Tourism WA need to focus attention on developing partnerships with operators, if you don't have support of the operators you can't effectively represent them.
- Tourism WA should be left with just marketing, events and a minimum spend on statistics
- Identifying efficiencies within its business model.
- In addition to building recognition for tourism, there needs to be greater effort to influence other government agencies which impact tourism.
- Ensure the labour market can handle a rebound in the economy.
- They need to completely restructure the TWA machine so that it is better able to achievements objectives and we need a tourism development authority with the people and the power and resources to identify tourisms sacred sites, review the old and inappropriate strata title tourism policy and get on with supporting the development of tourism developments that have a chance to work.
- Alongside this they need to restructure the marketing and research sections so that they get more practical marketing done and so that they can save the cost of the research staff and so use the States money more effectively.
- Appoint a majority of the Tourism Commissioners from a pool of people with practical tourism experience and the drive necessary to get things done.
- Creating an overriding WA Marketing catchcry / phrase that then umbrellas individual regional tourism marketing initiatives, i.e. doesn't lump every WA tourism destination / icon into one homogenous, confusing message.
- Grow international services from existing carriers.
- Define and articulate a single brand for WA based on the market's interests, not those that are jingoistic ally derived.
- Sell Perth as the destination ahead of Western Australia.
- Ensure Perth can exceed visitor expectations by encouraging development of infrastructure - airport, a grand road access entry to the city and attractions - including liberalisation of retail trading hours.
- Treat regions and their unique selling points as derivative products not THE product.
- Lead diversity in tourism product development.
- Work cooperatively with regions to build and establish unique identities and visitor experiences; not every town can have mud brick winery chalets with local arts and craft!
- SERVICE SERVICE SERVICE - lead the industry to prioritise service over architecture.
- Resources are too scarce (and always will be) to divert effort elsewhere.
- Work closer with industry to ensure government at all levels has a better understanding and working relationship with All levels of Tourism as it effects All industry across the state and country
- Tourism needs to have a voice in all major government infrastructure decisions so as to ensure there are always positive outcomes for Tourism and community
- Value of tourism to local govt, community, stakeholders and Cabinet.
- Refocus on big picture WA via Perth as the nucleus
- Encourage more frequent and varied direct access points into WA (e.g. Interstate and International; Flights)
- Increasing funding from treasury (at least doubling)
- Lifting the effectiveness of the large employee force in TWA
- Attracting international air services to Broome and other regional areas
- Tourism WA, need to focus on selling the emotional experience of holidaying in Western Australia and delivering on those emotions through tourism operators and government.
- Less money on administration and touchy feely type activities and get on with the job of making things happen.
- Continue to support infrastructure development and push Govt to fast track roads and airport arrival experiences.
- Lobby Govt to fast track approvals for hotel development and incentivise any proposals though financial savings to potential developers.
- Strengthen support for 'business travel' and conferencing where delegate expenditure is guaranteed and pre and post conferencing broadens the WA experience opportunity.
- On promoting Perth as a tourism destination which includes all the attractions the state has to offer. Not competing with each other.

- Working with the industry to effectively market tourism in way that works and not AS they think it should be done
 - Staying in front of new marketing tools e.g. Social media to be used to market the state
 - The Minister should select at least half the board of TWA based on "Destination Marketing Expertise and Experience"
 - TWA should be the conductor of the orchestra when it comes to marketing the State for Tourism. However for this to occur there needs to be respect for the organisation as a "Destination Marketing Organisation. Not all of industry respects TWA. They need to win the respect of all of industry back.
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- Increase the level of interstate marketing
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- Development of an iconic brand/statement that epitomises what is unique about WA as a tourist destination differentiates us and is synonymous - i.e. examples such as 100% Pure New Zealand.
 - Internet and other electronic mediums to communicate the WA tourist message to the potential market
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- Research
 - Effective marketing
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- They should redirect income from administration to product awareness.
 - Changes should be made to avoid the business as usual syndrome.
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- More diverse range of iconic experiences
 - Build target markets outside of the normal markets
 - Market Aboriginal tourism as well as accelerate the development of Aboriginal tourism
 - Build access points into Western Australia
 - Build up WA's reputation as an experience, fun, adventurous and quality destination
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- Peak tourism growth in WA has always followed improvement in access i.e. sealing of Eyre Hwy, removal of two airline policy, introduction of Qantas into regional areas, access must remain a key priority
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- Encourage and not discourage investment in tourism accommodation facilities. Recognise the commercial difficulties associated to developing tourist accommodation without including a permanent residential component that renders the project viable.
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- Just get things done
 - What is happening to the international marketing
 - The problem is all talk and still no action and this has been going on for years
 - It takes too long to get anything done
 - Too much market research!
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- Provide shopping or other activities that visitors could do at night and on Sunday
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- Domestic travel by Australian's within Australia.
 - Increased average length of stay to enhance experience and give greater depth to holiday.
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- Tourism WA should be focussed on promoting WA as a tour destination in an ongoing way
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- Working to encourage development and developers
 - Work with the government to encourage the removal of the red tape that holds up progress for developers
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- Greater focus on developing markets such as :
 - India and China
 - Youth and Backpacker Market
 - Domestic interstate
 - Encourage improvement in all areas of the tourism product on offer in the state
 - Engage more closely with industry
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- Perth City should be marketed as a primary tourism destination. TWA and City of Perth should come up with a promotion package to support the city hotels. We need to bring the inbound market in to the city.
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- Tourism WA needs to work much closer with City of Perth and other councils of tourism interests.
 - What is the use of spending Millions of \$ if your city is dirty badly managed and unsafe.
 - I as a Hotelier with 25 years in the same property lapped up the compliments of our guest on a daily basis. This was till about 3 years ago. Now all we hear is dirty, obstructions from major building sites, unruly behaviour.
 - It is no different than a Hotelier who walks through his Property on a daily basis to inspect and rectify the short comings. Get out and walk the street it is not hard and costs very little you are



totally unable to manage and understand what tourist want.
<ul style="list-style-type: none"> • Core focus would be to market Western Australia to Asia and interstate markets aggressively. Only 4% of WA's tourism market comes from other states. • Market the accreditation brand in order for the consumer to be educated on its worth. This will increase overall value of the accreditation to the industry as more and more consumers would know to look for it. • Short term Tourism in residential areas. This is an area that needs to be regulated. If this is regulated, and benchmarked then to lessen the effect of local regional Communities. • It would improve quality of visitor experiences and create a more professionally recognised industry.
<ul style="list-style-type: none"> • Lobbying for extended retail trading hours & days
<ul style="list-style-type: none"> • More tailored and effective advertising campaigns.
<ul style="list-style-type: none"> • Dispersal of visitors out of Perth to the regions • Events in the regions • Busselton airport upgrade so flights can be received from the East Coast. • The balance between domestic (WA based visitors) and eastern states and overseas visitors is very bad!...Effort need to be on improving this most south west properties have over 85% some 90% WA guests! This is not going to secure the future of regional tourism!!
<ul style="list-style-type: none"> • Influence government to reduce costs for investment in the industry. • Influence government to encourage incentives / tax breaks for current business to invest in sustainable programs.
<ul style="list-style-type: none"> • The merging of new with established well recognised product should be seen as a priority of all agent famil programmes. The current system which is predominately left to the ITO must cease. • TWA should also be providing future employment forecasts to government in order that the industry does not experience any further shortage of skilled labour.
<ul style="list-style-type: none"> • Creating initiatives (through local, state and federal governments) to deal with the more than significant costs involved in • Setting up and then maintaining tourism ventures in a vastly spread state • Transportation for both the operator and visitor to access these ventures • Creating sustainable employment opportunities in the form of infrastructure (accommodation, entertainment public transport etc) in some of the remote locations
<ul style="list-style-type: none"> • We need something that puts us on the world map. For example we need an exceptional series of events, an amazing structure like the Guggenheim museum in Bibau, a vibrant busy city centre etc. We also need to move into the 21st century and have public transport that links the airport to the city, extended shopping hours, daylight saving etc.
<ul style="list-style-type: none"> • Determine the target markets that will or do find Western Australia as a desirable tourist destination. • Develop strategies that will encourage those target markets to come to Western Australia.
<ul style="list-style-type: none"> • Marketing and creating WA as a desirable destination
<ul style="list-style-type: none"> • More funds allocated to marketing activities and less in administration • A campaign to Government, Local Government and the community on the value of tourism to WA • Once the value to the State is know, hopefully this will automatically increase the quality of visitor experiences
<ul style="list-style-type: none"> • Ensure that a range of quality and affordable Western Australian Holidays are promoted on a regular basis as per the other states of Australia. • Promotional in-market tactical campaigns are essential in order to compete for market share. • WA seems to lack behind other states and there has been too much emphasis on brand and insufficient activity in-market over the last 12 months.
<ul style="list-style-type: none"> • Increasing visitation in a sustainable manner so our industry can survive - it is dire at the moment another winter like this on the back of the last ones will send many broke. The above objective (number 3) to increase expenditure faster than visitor nights is weak and is designed purely so they can say the have achieved their objective - do something and get more people here, yes sustainably, yes with yield but get them here. • All regions of WA are not the same as each other, have different seasons and different attributes and certainly different amounts of infrastructure and value to the TOURISM industry. Market them appropriately at the appropriate time not just when they have the time, suits the new branding.

- Stop counting the corporate market into the stats when it suits, leisure is what we can effect, judge on that.
 - Tourism WA needs to become a authority where it can enforce change. the informal holiday home market is killing the viability of the industry and needs to be forced into line, there are dangerous, low quality products that are taking profitability, occupancy and yield from legitimate business that are good for the community.
 - Poor quality businesses that are not safe need to be forced out or forced to improve their products.
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- Create a climate for tourism developments to occur i.e. addressing other govt dept bureaucracy
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- Fix issues with bottlenecks in planning approvals.
 - Many and frequent reports of Tourism WA putting up deterrents to developers. We should be chasing and wooing developers, not making their life so hard that they give up and go elsewhere!
 - Get a "Brendon Hammond" solution into Tourism, i.e., as was done by Carpenter government to fix resource industry planning approvals delays.
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- There needs to be a more concerted effort in partnering with trade such as overseas wholesalers to package up WA and increase exposure and product in our key markets.



Do you believe there are areas that Tourism WA should no longer concentrate on? If so please list below.

- All of industry development needs to be completely removed from TWA and be give to a TOURISM DEVELOPMENT AUTHORITY that can give the time ,support, focus and expertise that this sector requires
- A concentrated effort should be made to identify efficiencies, efficiencies may be achieved by better positioning activities in other agencies already undertaking similar services.
- TWAs obsession with high end tourism product and high value tourism product and the SW need to be rethought as we are not going to be competitive with the high end tourism product available elsewhere in the world and the SW is already struggling to fill the product already in the marketplace when the Gascoyne and Pilbara have much more potential for growth and less infrastructure support from Govt as a whole.
- That is the area where there is potential growth to accompany the mining development planned for the mid west
- Stop chasing a mainland Chinese carrier. It will harm services provided by QF, CX and SQ
- TWA is primarily a marketing body so any function that does not involve Awareness functions to increase visitation and visitor spend into All areas of WA should be directed into a new Ministry of Tourism or Tourism Development Authority
- EventsCorp should have its own structure and direct funding from Governments as should WAITOC
- They should cease to be involved with planning issues as they have for many years been the reason that development of tourism accommodation in this state is so far behind the rest of Australia
- Investment attraction....this should be outsourced to experts in this field
- Tourism Planning Approval
- Investment attraction has not been handled well and I question what has been and will be achieved by inexperienced public servants who have no or limited commercial experience out trying (and failing) to attract investment.
- Bring back a serious 'EventsCorp' and bid for international events in a serious way. Not necessarily based on a formula of financial return, but one that exposes Perth/WA to an international audience, whatever the special interest!
- Infrastructure development, regulation, non-marketing research
- They shouldn't do employee development
- They shouldn't do anything else other than Marketing of Tourism.
- Regulation
- Their European advertising is probably not yielding the results as a similar effort in Asia would
- There are thoughts that Tourism WA should be split into two departments focussing on marketing and product development, however, that idea should be explored further.
- Less money on administration - more money on marketing
- EventsCorp should be treated separately from TWA, should fall under Premier and cabinet
- TWA could give more focus on bringing in business and events into the state.
- Work in conjunction with educational institutes and stakeholders to allow them more focus on indigenous tourism
- Professional up skilling by recognising the work of others who have been delegated specific tasks TWA may be able to get further ahead in a shorter time span.
- It is a waste of money to market WA as a tourism destination alone. Organise events that bring people into the area and just advertise them. Make sure there are events on all the time - have a central co-ordination of events.
- TWA should be a marketing arm and should both concentrate on any other activity other that Marketing the state. Other functions can be handles by better qualified departments.
- Less focus on landbank and planning issues and more on marketing
- They need to become more efficient, have less staff and do things quicker and act more commercially and less like a charity.
- The bureaucracy is a joke and needs to go.
- Planning approvals!!
- Infrastructure development - TWA has not been successful in establishing infrastructure in the city and in key regional areas.

Part Two - Marketing/Awareness

1. The following initiatives are currently listed in Tourism WA's Strategic Plan for 2008-2013. Please prioritise/rank the initiatives in terms of relevance for the industry.

	Not Important	Slightly Important	Important	Very Important	Essential
Develop and implement marketing and communication strategies to build awareness and desire to visit Western Australia	0.0%	0.0%	13.9%	11.1%	75.0%
Increase visitation, yield and dispersal from target markets	0.0%	0.0%	11.4%	40.0%	48.6%
Provide meaningful and actionable research to guide strategies and actions of the Western Australian tourism industry	0.0%	8.3%	36.1%	27.8%	27.8%
Communicate effectively with industry, government and the people of Western Australia	0.0%	5.6%	22.2%	25.0%	47.2%
Provide increased customer access to information about WA & feedback to industry regarding consumer needs	2.8%	5.6%	33.3%	38.9%	19.4%
Focus on marketing deliverable experiences to encourage the development of new quality products	0.0%	0.0%	16.7%	33.3%	50.0%

2. Please also prioritise/rank the following departments within Tourism WA's marketing area.

	Not Important	Slightly Important	Important	Very Important	Essential
International marketing	0.0%	0.0%	19.4%	25.0%	55.6%
Australia / Pacific Marketing (Australia, NZ, and USA)	0.0%	0.0%	5.6%	25.0%	69.4%
Marketing Services (advertising campaigns, digital marketing, trade & consumer events, and branding)	0.0%	0.0%	16.7%	30.6%	52.8%
Media and Public Relations	0.0%	2.8%	19.4%	41.7%	36.1%
Research	2.8%	13.9%	25.0%	33.3%	25.0%



In addition to these initiatives, what do you believe the Marketing department at Tourism WA should focus their attention on?

- They need to connect successfully with industry and stakeholders, they do not manage to achieve what the RTO structure has achieved and that is "support" from the industry
- They need to get more practical and deliver product with a real and attractive call to action
- Increased focus on on-line marketing
- Increase high profile special event type activities (e.g. Red Bull Air Race)
- Develop platforms for private industry to participate in JV marketing initiatives with TWA (increase leverage on marketing \$ spends)
- Ensuring we have offices and the right people in existing core markets and we identify and open earlier in growth and new markets and we need to stay committed to these offices and the relationships.
- Burswood and Crown have more offices worldwide than TWA and this is not acceptable
- Whilst not a marketing role it is a relationship role and TWA as a group needs a closer working relationship with Austrade or WA trade offices to ensure budding overseas investors are engaged in their own country and encouraged to invest in WA
- Value of Tourism Campaign
- Support RTO's
- Interstate and international marketing
- Special Events development (state wide)
- Establishing and promoting a universally recognisable brand for Western Australia
- Emotional branding.
- Build on current markets that deliver business following a downturn.
- Reference the 2003 SARS delivery and recovery.
- Don't spend on new markets especially China at this stage.
- Perth will be fourth or fifth choice at this time, following Sydney, Gold Coast, Great Barrier reef and Ayers rock.
- Working much closer with industry. This has improved in recent years but has a long way to go to get back to how it was in the 90's
- Brand W.A
- High yield, low environmental impact tourism
- There is no reason to research a product to the extremes they do while sacrificing the support of the product. Get the product packaged and known.
- The industry can tell which markets the visitors are coming from and growth trends but they cannot afford broad advertising campaigns which is where the TWA should be spending
- More innovative image library and branding
- Have continuous fabulous events in WA. A co-ordinated approach to managing events. Put Perth on the map by building something special that gets on the world news and makes people want to come and see it.
- Internet ad getting WA to the Top of the List on Search Engines. We are being beaten by other states in this area...
- Attracting visitors to WA
- Expose and help new product penetrate domestic and international markets
- Business events
- Not convinced that we need to develop new products. Those that are inexistence now need to be viable and that comes with increased visitor numbers and yield...otherwise the new products will be in the same boat and the existing ones now
- I see the biggest threat to the tourism industry in WA is the cheap Asian destinations which the Western Australia holiday makers flocks to. The only way to change this in my opinion is to give people a reason to travel within the State. That where events are great the Busselton half iron man and the full iron man and the forest car rally are great example!
- Sport is a great event maker ...make some sport events from school ages to masters ages..

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- Make sure marketing campaigns are monitored to see their success. Are campaigns increasing market in international & interstate? If not innovate new opportunities instead where viable. Inform members of the success rate over a period of time:
- Look around our competitors and improve our facilities
- Joint marketing with other destinations such as Singapore. The potential markets are China and India.
- Make a plan and stick to it
- The focus should be totally on 'growing the pie', through targeted activities that will produce incremental business for the state.
- Establishing and promoting a universally recognisable brand for Western Australia
- Focus on a whole of Government approach to the value of tourism to the State
Create a brand for WA that lasts - the brand remains, however there could be difference themes
- Currently focus on short haul markets which are delivering business.
- Removing deterrents to private industry to develop infrastructure, and offering incentives.
- Offering Indigenous experience that people will come back for.
- Burrup rock art - this place is incredible and Tourism ignores it. It is our Stonehenge / pyramids / Ayres rock. It must be protected first and foremost, but also promoted and made accessible to public, with controls. Promoting this would open up the whole Pilbara to more tourism.
- Utilising trade (and media) to sell the state globally.

Do you believe there are areas that the Marketing department at Tourism WA should no longer concentrate on? In so please list below.

- They need to get a successful campaign up and running.
- The last decade has been filled with campaigns that have been average at best.
- Research
- If they spent more time and effort growing the business and less on working out why last year's campaign failed they would make some real progress.
- They should focus more on the items above and allocate more of their budget to these activities than research
- Intrastate by funding the RTOs by at least double.
- Research
- Europe
- Administration
- Just doing general marketing of WA is a waste of money. Have events that people want to come to from all over the world and market them.
- Need to focus energies on those areas with the biggest impact. Suggest that Tourism WA should know where they are wasting resources.
- Business standards. TCWA were formed for this purpose they should promote the accreditation.
- They need to do less things better if they can't increase their budgets.
- They need to work out the NZ market better, is it FIFO workers, are they leisure visitors, I do not believe that their length of stay if correct is for leisure, seems more conducive to FIFO.
- Tourism WA should not be spending so much time and effort on an online booking system. Private industry should invest that themselves.
- Korea

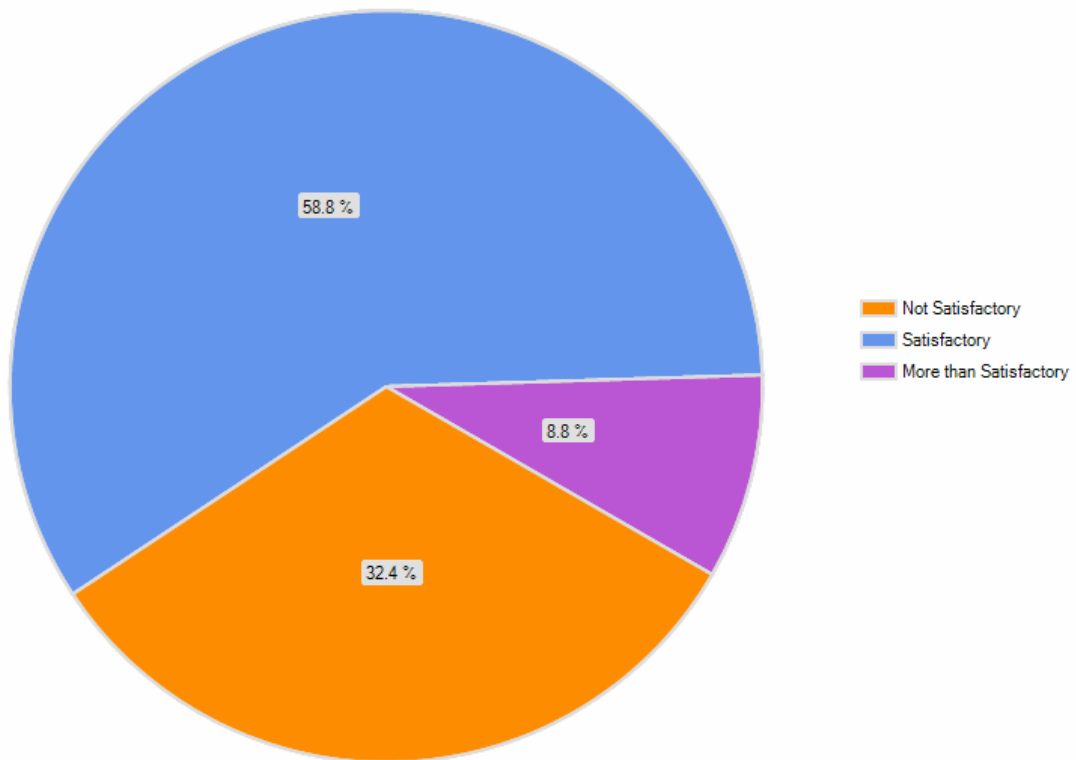


Part Three - Industry Development

1. The following initiatives are currently listed in Tourism WA's Strategic Plan for 2008-2013. Please prioritise/rank the initiatives in terms of relevance for the industry

	Not Important	Slightly Important	Important	Very Important	Essential
Ensure the environment is right to attract capital investment and re-investment	2.9%	5.7%	14.3%	31.4%	45.7%
Facilitate the development of new tourism products	0.0%	14.3%	22.9%	40.0%	22.9%
Enhance existing products by encouraging product providers to become quality assured and by providing business development seminars through the Better Business Blitz program	5.9%	20.6%	26.5%	29.4%	17.6%
Improve the provision of destination and product information and booking facilities for visitors to Western Australia	2.9%	20.6%	26.5%	29.4%	20.6%
Improve product quality and service delivery	5.9%	23.5%	17.6%	26.5%	26.5%
Develop sustainable destinations	2.9%	8.6%	31.4%	34.3%	22.9%
Provide increased customer access to information about WA & feedback to industry regarding consumer needs	2.9%	11.4%	42.9%	25.7%	17.1%
Deliver sustainable and innovative visitor servicing	0.0%	20.6%	38.2%	20.6%	20.6%
Develop strategic policy in terms of a long term view of tourism, policy levers, legislation and regulation, central policy requirements, and aviation reviews.	0.0%	0.0%	25.7%	22.9%	51.4%
Develop destinations by focusing on places and experiences	0.0%	14.3%	28.6%	31.4%	25.7%
Facilitate infrastructure development by identifying investment opportunities	0.0%	8.6%	28.6%	17.1%	45.7%
Manage quality by driving higher standards	5.7%	14.3%	34.3%	28.6%	17.1%

Do you consider Tourism WA's current level of focus/funding for Australian Indigenous Tourism to be:



In addition to these, what do you believe the Industry Development department at Tourism WA should focus their attention on?

- They need to let this area go
- Some of industry believes TWA to be anti development
- Work with the Department of Planning to implement the State's strategic tourism sites.
- Identify projects of state significance and ensure they are on the Department of State Development's agenda.
- Plan for labour shortages to return and take action to mitigate the bottlenecks.
- Establish a tourism development authority
- Removing barriers to development. Containing over regulation by government departments; e.g. health and liquor licensing.
- They should ONLY provide comment to a new Dept of Tourism or Tourism Development Authority in regards to planning
- They should adopt a market driven approach rather than set unrealistic goals and outcomes that are often uncommercial in regional WA or uneconomical because of high land costs, height restrictions or coastal setbacks.
- They should acknowledge best practice and outcomes of other successful high visitation destinations like Queensland, Northern NSW, Hawaii, Florida, New Zealand
- They should adopt the JLL Report as this cost TWA \$150k and the messages are the same that industry has been saying for over 15 years.
- TIME TO CHANGE GEARS in WA now.
- Working with industry to ensure that products and services are export ready
- Less on bureaucracy / politics and more on deliverables
- Educating the industry on how TWA can influence their business.
- Govt to pay for due diligence on sites, fast track approvals and offer no fee incentives for site development.
- Understanding what is required commercially from a private sector point of view to develop and manage a sustainable tourism project. This will allow better decisions in respect to allocation of funds to tourist projects and also how to support businesses in the tourism sector.
- Focus on tourism projects that teach environmental sustainability and our eco driven - and make these more learning experiences than just a traditional visitor experience.
- Work with other govt depts. to attract additional infrastructure (i.e. tax incentives etc)
- Listen to the industry, determine their goals from there and concentrate on infrastructure and areas that need wide ranging outcomes i.e. areas where tourist operators are unable to fund. An example is whale watching. WA has the greatest number of Humpback whale migration in the world. Fisheries and DPI totally inhibit the availability of the product. A tourist boat, if they can afford one of the few licenses, with experienced staff must stay 300meters away while a private boat without even a trained captain can go to 100m endanger the animal and scare it away while the passengers who have paid to see the whales cannot understand why the tourist operator will not take them closer.
- Certainly need to utilise technology to the benefit of WA. The power of the interactive media today should be leveraged to give WA an edge.
- Perhaps, get together with all industry stakeholders to get a promotion happening where we
 - 1) design variety of giveaways (to make people feel happy about coming here) but they must come to redeem the free stuff - not just free hotel rooms...
 - 2) Build desire / trust in the what we are offering, in a way deliver results in advance
 - 3) ask for the \$\$ - find the emotional driver in people to get them hooked or book it!
- Make it easier i.e. less red tape for investors to come in and create tourism places. For instance everyone goes to Bali for a relaxing cheap resort holiday. Why can't we provide this locally?
- Greater emphasis must be placed on aviation access to Perth

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- TWA will accomplish more by working more and more with LTO RTO and industry partners on the aforementioned points. Other industry groups are working to improve quality and service, which is very important for the industry, however marketing the businesses that have been successful is more helpful to the industry if consumers understand that standards are recognised. Those standards will be more sought after by the industry.
- Indigenous tourism is challenging and will not happen easily. It takes partnerships with indigenous groups to be strong and will take time to change the mindset of many indigenous groups. It is definitely a long term goal to work towards.
- The best way is to clean up what we have, is to make it special and user friendly.
- Nature base tourism
- Youth and backpack market
- Any development needs to be economically sustainable. There are issues in some markets of oversupply of accommodation which is resulting in shorter peak periods and even softer off peak periods.
- More focus on encouraging the development of product infrastructure and the seed development of new destinations.
- TWA should concentrate on marketing.
- Less red tape for developments.
- Should be one Department to fast track developments.
- WA is losing potential developers due to the slow approval process
- Improving product standards in regional areas
- Improve the provision of destination and product information but not booking facilities for visitors to Western Australia -The development team needs to be able to quality judge the operators and direct improvement or closure of poor and unsafe experiences/properties/holiday homes.
- Identifying sites and facilitating development
- Getting agreement from all government departments to streamline the development process. WA desperately needs accommodation in key tourism areas.



Do you believe there are areas that the Industry Development department at Tourism WA should no longer concentrate on? In so please list below.

- They should be removed completely from this are and just focus on marketing, events and other minor government issues
- Find synergies with other Government agencies to form partnerships to deliver similar services, such as the better business blitz program, regional services. This will in-turn increase the recognition of tourism by other agencies.
- Planning, Strategic Sites, and Indigenous Tourism
- Query whether TWA has this department if at all there is a reshuffle!!
- I do not necessarily believe that the industry development department has the resources and experience to attract international investment in WA. This is a very specialised field and requires high levels of expertise in this area.
- Trying to be hotel and resort designers. Telling developers what they cannot do rather than supporting what they might like to do.
- Firstly they should allow the industry to determine most of the policy, they should downscale research, reduce administration, withdraw from areas they have little input or expertise in and wait for industry to identify the possible infrastructure bottle necks. e.g. Aviation and airports Busselton is never going to be a regional airport let alone an interstate airport. Perth airport is where TWA should be pushing.
- The majority of industry development time appears to be with small business particular in regional areas - this could be carried out by SBDC
- Sometimes we need to spend less time analysing and take action. In saying that, we certainly MUST have a clear purpose and focus our energies on what we believe to have the biggest impact. Would suggest review of where resources are being utilised which are not adding value.
- Less focus on managing visitor servicing.
- They should focus their efforts on marketing the State
- Development is important but when there is an oversupply they do not need to be encouraging further development - rather they need to be telling developers that they need to not develop. Many developers are making their money out of the development and then selling early leaving a non-viable property for investors and the government to support. If occupancy is 55% annually, there doesn't need to be 8 new resorts. Someone needs to tell them that.
- Facilitating regional infrastructure development. TWA regional managers have little impact on infrastructure development.

Part Four – Events

1. The following initiatives are currently listed in Tourism WA's Strategic Plan for 2008-2013. Please prioritise/rank the initiatives in terms of relevance for the industry.

	Not Important	Slightly Important	Important	Very Important	Essential
Identify and attract a diverse range of world-class events to Western Australia	0.0%	9.4%	12.5%	40.6%	37.5%
Provide funding for major events, regional events, and arts and cultural events	0.0%	0.0%	32.3%	19.4%	48.4%
Support and develop events from concept to successful implementation	0.0%	13.3%	26.7%	36.7%	23.3%
Manage and grow events, particularly in regional areas	6.3%	6.3%	25.0%	43.8%	18.8%
Leverage tourism, business and media opportunities through events	0.0%	6.3%	15.6%	43.8%	34.4%
Maximise business tourism	0.0%	6.3%	9.4%	40.6%	43.8%
Identify further and improved opportunities to market and promote events to ensure increased awareness and participation	0.0%	0.0%	21.9%	34.4%	43.8%



In addition to these, what do you believe EventsCorp should focus their attention on?

- They need more funding and need to simply attract more high level events
- Getting more effective - perhaps getting a board that knows more about Tourism and events
- Increase its regional focus for special events
- Concentrating on getting "bang for the buck". This appears to have been happening in recent times.
- These roles should all be managed by EventsCorp with direct funding from Government as it was in past and TWA provide collaborative marketing initiatives on all major events in Perth and regional WA
- Develop unique WA based events that could be ongoing.... not one off
- More high class events and communicating their pipeline to the industry
- Stop continuing the nonsense that a lot of events it backs somehow is tourism related. A lot of the events are nothing more than "feel good" events aimed at the local population e.g. Hopman Cup.
- The whole events issue needs transparency and we will never compete with Melbourne due to geographic isolation.
- Getting major events into WA
- EventsCorp seems to be focused on singular large events. Focus should be spread to supporting a wider base of smaller events that target specific sectors which have growth potential.
- Tourists are becoming increasingly discerning and seek out specific experiences that address their interests.
- Be reactive to possible events and realistic. Go out to industry and sports and say if we supported you what events could you do to bring fame and tourism to WA. The Red Bull air race is a great achievement.
- There are probably others that the sports body knows of but do not have the dollars to get off the ground. Ask them but remember we are an isolated destination
- A more diverse range of events is required. Past events have only focused on sport based events.
- Long term sustainable events that can attract interstate and international visitors. A signature event is vital to ensure Perth and WA stays on the world calendar.
- With the economic development of WA opportunities need to be pursued to attract international events. One such event would be the Perth Cup and the summer racing carnival with appropriate prize money and international visitors
- Co-ordinate all events in Perth & WA to ensure world class events on all the time.
- Communicating opportunities direct with hotels and tourism providers rather than going via wholesale operators.
- Work with Councils, Transport, Parking, Police, AHA to better the product that you are selling at the moment.
- Events Corp should also work closer with the Hotels and Restaurants in the sense that we are aware of what is happening . You find no updates from them at all. With today's Electronic systems that should not be hard. No major funding required only use what you have
- consolidate all the events in WA and group them small/medium/major.
- The hotels should support the these events according to their capacity.
- Regional Events
International events
- EventsCorp needs to do a lot more to retain world class events in Perth e.g. Rally Australia; Hopman Cup
- 35% of the Tourism WA budget is too great for the comparative return, especially given medium capacity constraints in the gateways. Focus should be more on growing regional 'home grown' events for greater return.
- Developing sustainable events in metro and regional areas, including events that are uniquely Australian
- Packaging events and promoting them interstate and internationally
- Encourage PCO's to in conjunction with an event which can be an incentive to attend a conference
- Intrastate business tourism is not 'owned' by anyone nor funded. The regions need to increase

business tourism which would in turn reduce seasonality and increase development of services and product. It starts with intrastate tourism.

- Incentives seem not to be important and business tourism only seems to be promoted for Perth with a token effort for the regions.
- Seasonal events could be created, also link TWA international offices with event promotion to increase both spectator and competitor numbers.

Do you believe there are areas that EventsCorp should no longer concentrate on? In so please list below.

- No they need more direct responsibility and encouragement to grow state as an Events and FUN destination
- Remember State of Excitement?? I think we have some work to do to make this claim again
- Yes, they should stop wasting their time on small cultural/art events, leave that to people like lottery west.
- Hopman Cup and other events that in reality just shift WA spending from one activity to another and do not add anything in terms of net increase in visitation.
- Stop working on a bureaucratic formula and consider the event for its community and tourism potential.
- Review who is on the Board and understands the value of tourism over the ROI of allocated Govt funds.
- Reduce focus on a major events and spread back to targeted events that drive potential markets
- The convention centre may be an albatross around its neck. It may not be but if it is you need to limit the impact it has on EventsCorp.
- Delivering the events through mainly one operator.
- There needs to be a high profile CEO who has the ability to open doors at a high level and cut through bureaucracy.



Part Five - SWOT Analysis

STRENGTHS

Please identify key valued services undertaken and strengths of Tourism WA

- Their \$50M funding is almost sufficient
 - Their partnership with RTO's to market the state
 - They have the basics in place to succeed in marketing
 - They have a passionate chairman
 - They have the basics in place to succeed in marketing indigenous tourism
- Skills of the marketing team.
 - They recognise the importance of planning, and are attempting to address key issues.
 - Comprehensive research and a skilled research team.
 - Policy around prioritisation of destinations and experiences.
- Information re current state of the industry / trends
 - Industry & government representation
- Passion for WA
- Funding RTOs
 - Conducting marketing campaigns
 - Supporting cooperative campaigns
 - Establishing tourism priorities within government
 - Visiting journalists programme
 - Conducting/supporting industry marketing events
- Marketing the destination
 - Industry Support
 - Research
- ATE in Perth was good last year
 - New Host Campaign may be good but still long way to go
- Marketing
 - Attraction of events
 - Research
- Managing Events
- Office overseas
 - Web marketing of the state
 - Support of the RTO's
 - Events Corporation
 - Funding of PCB
- Marketing
 - Events
 - Business Tourism
 - Information for Tourists
 - Identifying new tourism destinations



<ul style="list-style-type: none"> • New marketing team • Allocation of resources to update branding • Updated technology (website, booking systems)
<ul style="list-style-type: none"> • Industry research • Focal point for whole of market strategies • Localised focus • Conduit for targeted government spending
<ul style="list-style-type: none"> • There are items like Red Bull and advertising however it is difficult to identify any area they do efficiently
<ul style="list-style-type: none"> • Identification as Indigenous tourism as the 6th key objective • Trade events such as support with WATE and ATE • Marketing to key markets • TWA network and visitor information • Establishment of regional managers and product managers
<ul style="list-style-type: none"> • Lovely big area to market with lots of unique things to see and do. Great weather too!
<ul style="list-style-type: none"> • Huge variety of activities and travel opportunities in the state. Variety from the South West to the Northwest...
<ul style="list-style-type: none"> • Brand WA • Diverse product and market segments • Strong and diverse industry
<ul style="list-style-type: none"> • Promotion through movies such as Australia
<ul style="list-style-type: none"> • Some key personnel are very skilled.
<ul style="list-style-type: none"> • Marketing • Attraction of events • Research
<ul style="list-style-type: none"> • New Exec Marketing Manager
<ul style="list-style-type: none"> • New Chairman who has a vision for TWA • They have some good people in their marketing team.
<ul style="list-style-type: none"> • Marketing • Education • Regional events

WEAKNESSES

Please list the areas of Tourism WA's deficiencies

- They don't seem to understand or properly relate to industry
 - The board is basically also out of touch and doesn't necessarily understand industry
 - They do not seem to have a passionate can do attitude
 - They do not have a decent long term strategic plan
 - They can be inflexible and slow - reluctant to change
-
- Lack of recognition of what tourism infrastructure projects are of state significance, to accelerate through the development process.
 - In-action and poor outcomes from strategic tourism sites and Landbank initiatives.
 - Lack of understanding about how tourism projects fit within the broader economy, which impacts their ability to influence other government agencies.
 - Lack of strategy around investment attraction.
 - Government bureaucracy and producing reports with no action.
-
- Lack of funding
 - Lack of identity for WA tourism
-
- A token department not appropriately prioritised and funded by government.
 - Tourism is business - real business, not soft.
 - Introspective approach to marketing.
 - Fragmented industry with poorly coordinated representation obfuscates true scale and significant of the industry.
-
- Failure to constrain other government departments from imposing rules and regulations harmful to tourism.
-
- Lack of resources both financial and human
 - Being a Department of Government - adhering to govt. policies that should not apply to a marketing organisation - tourism ministers who do not understand tourism - government tender regulations that take a long time to complete
 - Board members who don't have tourism experience
-
- Planning
 - WAITOC
 - Too many consultants and people engaged in research instead of marketing and events activities
-
- Negative attitude to development of tourism accommodation product
 - Gradual expansion of the role of TWA over time has taken the focus off its key role being marketing
-
- The marketing department was dysfunctional (consumer vs. trade) this is now being addressed through the new restructure.
-
- Bureaucratic, passing parade of staff, too easily influenced by political masters, staff who should not be continued with but as a bureaucracy, they just keep being pushed into another job rather than moved on.
Board composition
-
- No understanding of destination marketing
 - No passion or empathy for tourism
 - No skills in destination management or marketing.



<ul style="list-style-type: none"> • Don't trust industry OR work at building that trust
<ul style="list-style-type: none"> • Seem to be failing to deliver on: <ul style="list-style-type: none"> ○ Marketing ○ Events ○ Business Tourism ○ Information for Tourists ○ Identifying new tourism destinations
<ul style="list-style-type: none"> • Transition of international representation/placement • Lack of market research • Insufficient state govt funding • Bureaucracy
<ul style="list-style-type: none"> • Understanding of individual tourist businesses needs • Understanding the commerciality of running an economically sustainable tourism business • Bureaucratic / red tape process in decision making and allocation of funds
<ul style="list-style-type: none"> • Fails to attract the support of major industry players • Slow to react due to public service restrictions • Appear to be overstaffed • Ministerial leadership • Support from other government agencies
<ul style="list-style-type: none"> • Lack of funding resources to implement many of the strategies • Perceived lack of profile of tourism on a ministerial level • Lack of regional WA consultation • No sufficient research that can be utilised by industry • Landbank - hasn't achieved what the original intention was
<ul style="list-style-type: none"> • WA is very remote and expensive. We have to have very special things on to make people come here.
<ul style="list-style-type: none"> • Distance from the Gateway... Sydney BUT why not Perth be the Western Gateway.
<ul style="list-style-type: none"> • Product familiarisation programmes
<ul style="list-style-type: none"> • Bureaucracy • Small budget • Junior Portfolio (needs to have a dedicated minister) • Anti development progress - not encourage long term investment • Does not always engage industry enough • Some poor marketing campaigns • Poor quality of tourism product • Do not support indigenous tourism • Airport • Landbank
<ul style="list-style-type: none"> • It does not consult industry enough • It is often at loggerheads with TCWA

<ul style="list-style-type: none"> • It does not focus entirely on marketing which it should • It has become too political and not sufficiently versed in the real world of what is happening in the marketplace
<ul style="list-style-type: none"> • Difficult to differentiate between Tourism Australia and Tourism Western Australia
<ul style="list-style-type: none"> • Can be too slow, bureaucratic and then clumsy with some decision making.
<ul style="list-style-type: none"> • Attitude to development of tourism accommodation product • Gradual expansion of the role of TWA over time has taken the focus off its key role being marketing
<ul style="list-style-type: none"> • Structure and Bureaucracy
<ul style="list-style-type: none"> • Administration staff too heavy • The lack of money allocated to marketing vs. administration costs • Can be very slow to make decisions • Not seen as important by Government • Lack of good advertising/brand campaigns • Landbank seems to be a bureaucratic waste of time
<ul style="list-style-type: none"> • Bureaucracy • Passing the buck/blame • Perceived to be spending a lot of time on creating the look of successful outcomes rather than creating successful outcomes. • Constant consultation and restructure • Run a skinnier operation, faster, less people
<ul style="list-style-type: none"> • Development approvals delays.



OPPORTUNITIES

Please list any new services or areas that could be developed by Tourism WA

- They need to downsize to just marketing and events and concentrate on this and do it properly.
 - They need to develop ONE successful and sustainable marketing campaign
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- Senior Minister overseeing the sector.
 - A board which is receptive to critical industry feedback.
 - Government imposed efficiency targets forcing Tourism WA to be innovative in its future service delivery.
 - Greater alignment to other government agencies with more power.
-
- Lead creation of a clear and saleable identity for WA.
-
- In conjunction with other agencies, free up more potential tourism product in national parks, on pastoral leases and particularly in the Pilbara.
-
- Marketing the destination should be the prime focus of Tourism WA
 - Ensuring that there is a whole of government approach to tourism - work with other departments of government especially on infrastructure development.
 - Families department to be increased
 - Regional offices to have increased support
 - Have an in-house IT department to ensure that WA's online presence is able to adapt quickly to market forces and the new technology era
-
- We need the TWA Board to acknowledge there are concerns in industry with TWA and listen to industry about these concerns
 - We need more people from industry on TWA board
 - We need an international full service airport as a northern gateway to Australasia into Broome and another in time as an entry / exit in Karratha
 - We need a Margaret River airport in Busselton
 - We need a can do approach from TWA and the government from the top down to elevate tourism as a major industry worthy of consideration at all levels of government
 - We need a dedicated Minister of Tourism 1st and it needs to be a senior cabinet minister if not the Premier
-
- Stronger focus on aviation
 - Stronger focus on attracting interstate visitors.
-
- Social Media
 - International Market
 - Interstate Market
-
- Poach events
 - Brand W.A
 - Seek international / State conferences
 - Lobby for a vibrant Perth (trading hours)
 - More actively support theatre events
-
- Proliferation of low cost carriers

<ul style="list-style-type: none"> • Delegate boosting for business events • Social media
<ul style="list-style-type: none"> • Engaging new technologies for the delivery of tourism messages • Develop environmental tourism • Develop learning based tourism products
<ul style="list-style-type: none"> • Outsource all departments so as to limit barriers and maximise opportunities with the removal of current restrictions. staff could be reduced with a focus on contractual agreements, strategic policies, legislation and regulation, access, liaison with other govt agencies
<ul style="list-style-type: none"> • In its current form it probably cannot produce much. It should help the industry get useless and hamstringing policies and procedures out of the industry. • Help industry across the line get the message through that boutique licences are good for tourism and the community. Not just a couple of media grabs but real on the ground support. Shake the procrastinators do not give them anywhere to hide support the industry players.
<ul style="list-style-type: none"> • New iconic experiences not just in WA but in regional areas • Strong research area • Indigenous involvement and participation in all areas of tourism • Lobby Federal Government for additional funding for projects • For WA to become a must see destination for visitors to Australia
<ul style="list-style-type: none"> • Build something that the world wants to come and see and enjoy. Have world class events that the world want to come and enjoy.
<ul style="list-style-type: none"> • Leverage WA's uniqueness.
<ul style="list-style-type: none"> • Potential growth in developing markets such as China and India • Growth in Indigenous tourism and the youth market • Develop world standard events • Training and support for developing business's
<ul style="list-style-type: none"> • Proximity to growing markets such as India
<ul style="list-style-type: none"> • Product and Marketing
<ul style="list-style-type: none"> • Create a whole of Govt approach to tourism • Ensure it is seen as a major industry along with resources and agriculture • Create a document that can be taken to Govt with stats from all sectors of the industry and those other industries who benefit from tourism, but do not acknowledge it • Ensure that Board has good representation from Industry and other industries who can bring expertise • More liaison with other Govt Departments re tourism • An advertising campaign that shows the uniqueness and vast ranges of experiences that holidaymakers/business people can have in WA
<ul style="list-style-type: none"> • Quality of operators • Helping create the right balance of supply and demand
<ul style="list-style-type: none"> • Burrup rock art



THREATS

Please list potential issues that could threaten Tourism WA's effectiveness

- Their perceived inflexibility
 - Their perception of being anti-development
 - Their sometimes slowness to change
 - Their inability to relate to the some of the industry (small operators)
- Lack of ownership of planning legislation and regulations that impact the tourism sector.
 - Lack of action taken by other government agencies to address tourism issues Tourism WA cannot change.
 - Future declines in marketing spending.
- Struggle to maintain relevance of the tourism industry in the face of "big" industries.
- Lack of budget to do the job effectively
 - Taking a "one size fits all" view of WA when regions vary greatly and need to be marketed separately albeit under an overarching brand.
 - Diverting of resources to non-core areas
 - Promotion of events with questionable benefits
- Change of government
 - Change of Tourism minister
 - Lack of funding
 - Government policy
 - Lack of industry support
- Reduced funding
 - Change is good and change is needed
 - If TWA continues to be all things to all men rather than focus on increased awareness and visitation then WA cannot expect to increase its share of Australia's tourism industry
 - Other destinations who may have bigger more effective campaigns in Singapore, Dubai and Queensland, Tasmania, Northern Territory, Indonesia
- Continued expansion of its role
- Continuing irrelevance
- Being overrun by a resource driven government and state
 - Not standing up for tourism
- Bureaucracy
 - Minority Interests
 - Politics
 - Imbalance between metro and rural interests
 - Lack of funds
- Lack of awareness of WA
 - Lack of iconic status
 - Inadequate air access
 - Perception of long haul travel

<ul style="list-style-type: none"> • Foreign exchange rates • Accommodation availability • Fuel Prices - leading to higher transport/airline costs • Government policy and funding
<ul style="list-style-type: none"> • Lack of govt support • To continue without change • Lack of whole of govt approach • Restricted access • Quality assurance
<ul style="list-style-type: none"> • Not re-invigorating it by changes in the Board and management.
<ul style="list-style-type: none"> • Lack of government commitment to the industry • Inappropriate branding • Terrorism, major natural disaster • Cut to funding (impact on programs and resources) • Australia to be seen as a difficult destination
<ul style="list-style-type: none"> • Old school WA who are still in the 1970s. Too much red tape and not enough State Government support. Need a Premier who will stand up and to be a "Jeff Kennett".
<ul style="list-style-type: none"> • Other states vying for the same pieces of business
<ul style="list-style-type: none"> • Industrial disaster could damage the image of WA. Oil spill/Gas burst leave bad publicity. • Lack of skilled service will be a threat to our industry.
<ul style="list-style-type: none"> • Every other state in Australia • Asia • Fragmented industry- afraid to grow and develop • No new product
<ul style="list-style-type: none"> • Lack of support from the industry
<ul style="list-style-type: none"> • Limited catchment market
<ul style="list-style-type: none"> • Domestic Tourism, Other State and Country Marketing Campaigns
<ul style="list-style-type: none"> • Lack of early identification of potential issues and the resolution of those, resulting in a 'bush fire' mentality.
<ul style="list-style-type: none"> • Length of time to make decisions • Lack of good marketing branding for WA • Reduced funding if tourism importance is not recognised by Government
<ul style="list-style-type: none"> • Bureaucracy • Getting commercially involved with commercial business - i.e. on line booking exchange
<ul style="list-style-type: none"> • Continued delays to development approvals.

