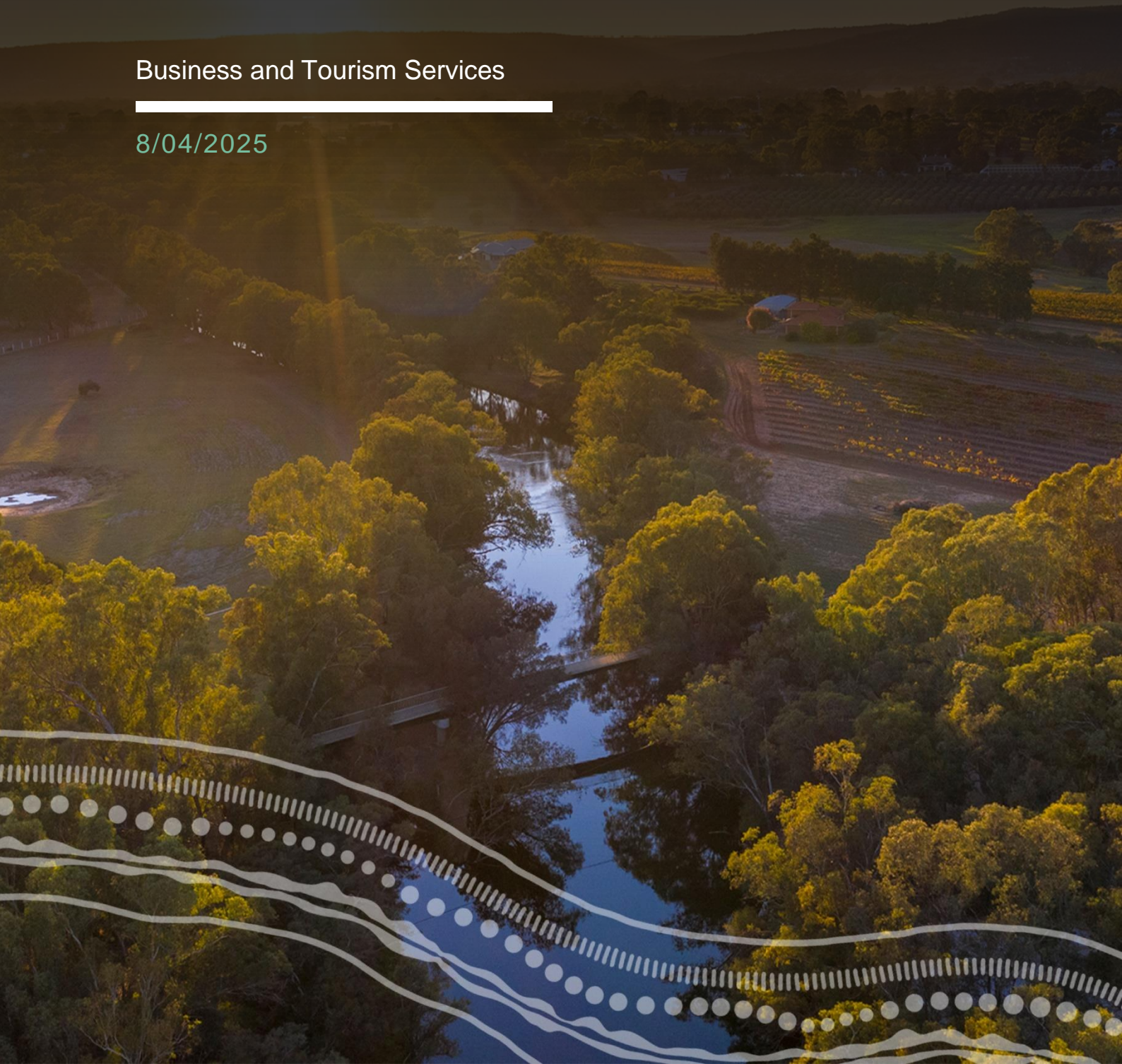


# Tourism Plan Background Report

Business and Tourism Services

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8/04/2025



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## Version control

<b>Version</b>	<b>Date</b>	<b>Prepared by</b>	<b>Issue description</b>	<b>Issued to</b>
##01	8 April 2025	Scott Fleming	Supporting information for review of Tourism Plan	Key Industry and Internal Stakeholders

The City of Swan acknowledges the Traditional Custodians of this region, the Whadjuk people of the Noongar Nation and their continuing connection to the land, waters and community. We pay our respects to Elders past and present, and their descendants.

## Introduction

The City of Swan is currently preparing a Tourism Plan.

Phase one of the plan's development was a background research and benchmarking exercise – conducted at international, national, state and local levels – to help identify current practices in comparable regions.

The objective of phase two is to identify key themes in the research to highlight opportunities for improvement in governance, funding and alignment with broader tourism strategies.

The outputs of phase two are:

- To develop a draft framework for the plan
- To produce a draft outline of the plan's structure, incorporating analysis as outlined above, and provide recommendations on strategic priorities and opportunities to improve the City's liaison with industry and internal stakeholders.

A detailed overview of the proposed contents page and outline is provided, along with key analysis to guide the direction and development of the plan. This analysis is intended to help City staff gain a clearer understanding of the report's intended direction and provide an opportunity for feedback, ensuring that all crucial elements have been included. There is scope for adjustments to the plan's structure and strategic direction if needed.

## Phase two: research

The research phase involved two key steps:

- A review of key documents, strategies, and plans relevant to the City's tourism industry. A summary table was created, outlining objectives, key themes, findings, and relevant priorities, actions, or recommendations
- A benchmarking exercise examined tourism strategies in comparable regions, including Yarra Valley, South Australia, Tasmania, Napa Valley, and various New Zealand destinations, to identify current trends and industry challenges.

The research clearly showed that many strategies across different levels (international, national, state, regional, local) emphasise the same priorities, indicating strong alignment in tourism development goals. Some standout priorities included:

- Balancing growth and sustainability – while expansion is a focus, there is a conscious effort to ensure tourism does not negatively impact local communities, agriculture, or the environment
- Indigenous and cultural inclusion – Aboriginal tourism is seen as a critical component, with an emphasis on authenticity, cultural preservation, and economic opportunities for Indigenous communities
- Economic diversification – tourism is being used as a key economic driver to create jobs, attract investment, and strengthen local economies
- Experience-driven tourism – the shift towards immersive, authentic, and experience-based tourism (e.g., farm stays, adventure tourism, cultural storytelling) is a major trend.

## Recurring themes

The strategy and key document review, along with case study analysis, identified several recurring themes throughout the research. Key themes included:

- Sustainable tourism growth:
  - Integration of agritourism, eco-tourism, and nature-based experiences
  - Focus on responsible visitor management and conservation-driven tourism
  - Adoption of eco-certifications and sustainable infrastructure investments.
- Collaboration and stakeholder engagement:
  - Strong partnerships between state, local governments, private sector investors, and Indigenous communities
  - Aligning efforts with broader tourism strategies such as Tourism WA and regional plans
  - Encouraging cooperation between agriculture and tourism sectors.
- Cultural and indigenous tourism:
  - Positioning Aboriginal tourism as a key attraction
  - Capacity-building programs for Indigenous participation in tourism
  - Development of cultural tourism precincts, storytelling, and guided experiences.

- Visitor experience and product development:
  - Developing high-quality, uniquely Australian experiences by expanding agritourism, Aboriginal cultural tourism and nature-based adventure opportunities
  - Enhancing visitor infrastructure and accessibility through improved signage, short-stay accommodations and regional experience clustering
  - Using consumer insights to shape new attractions and events, ensuring tourism offerings align with market demand and visitor expectations.
- Infrastructure and accessibility development:
  - Enhancing visitor infrastructure, accommodation and transport connectivity
  - Upgrading road networks, public transport and digital services for visitors
  - Developing and maintaining high-quality trails for adventure tourism.
- Destination branding and marketing:
  - Establishing a unified brand strategy for tourism destinations
  - Promoting unique experiences including agritourism, food and wine, adventures
  - Using digital marketing and data-driven insights for visitor engagement
  - Leverage authentic storytelling by developing local storytellers, celebrating unique agritourism and indigenous experiences, and creating compelling content that aligns with consumer demand to enhance destination identity and engagement.
- Economic development and investment:
  - Attracting private sector investment for new tourism products and experiences
  - Encouraging regional business clusters and partnerships to enhance visitor offerings
  - Supporting small businesses, particularly Indigenous and agritourism operators.
- Workforce development and training:
  - Developing vocational training programs for tourism and hospitality
  - Addressing workforce shortages through targeted employment initiatives
  - Providing business support for tourism entrepreneurs.

### **Overlapping strategies across different levels (national, state, regional and local):**

The key document review identified a series of strategies and recommendations, with each level of government and relevant organisations playing a role in their implementation. The research revealed several overlapping strategies and actions.

- Agritourism and food-based tourism:
  - Supporting farmers in diversifying their businesses for tourism

- Developing high-quality, uniquely Australian agritourism experiences
- Aligning tourism efforts with the food and beverage industry.
- Adventure and nature-based tourism:
  - Growing mountain biking, hiking, and eco-tourism experiences
  - Enhancing conservation areas and trails for tourism development
  - Promoting low-impact recreational activities like kayaking and wildlife tours.
- Aboriginal tourism development:
  - Investing in Aboriginal-owned tourism businesses and cultural centres
  - Increasing awareness and accessibility of Indigenous cultural experiences
  - Encouraging mainstream operators to integrate Aboriginal content into tourism offerings.
- Infrastructure and accommodation:
  - Encouraging private sector investment in short-stay accommodation
  - Developing eco-lodges, vineyard stays, and boutique tourism experiences
  - Improving transport accessibility for visitors.
- Regional and local business support:
  - Promoting regional clustering of producers and tourism operators
  - Supporting small business mentorship and entrepreneurship programs
  - Ensuring tourism aligns with existing land use and community needs.
- Technology and data use:
  - Using consumer insights and sentiment tracking for experience development
  - Enhancing digital visitor experiences (e.g., apps, online itineraries)
  - Leveraging innovative tech to improve tourism marketing and efficiency.

This diagram provides examples of how the various tourism strategies/documents and recommendations overlap across different government and organisational tiers (national, state, regional, sub-regional, local, and place).

Each level has distinct responsibilities but also shares common objectives to enhance tourism development, sustainability and visitor experience.

Strategy Area	National	State	Regional	Sub-Regional	Local	Place
<b>Agritourism &amp; Food-Based Tourism</b>	Policy alignment with food & beverage sector	Investment in regional agritourism	Promote regional food trails & clusters	Support local producers & markets	Encourage farm stays & direct sales	Place-based food experiences
<b>Adventure &amp; Nature-Based Tourism</b>	National eco-tourism branding	State parks & adventure infrastructure funding	Develop conservation-focused tourism	Improve connectivity to nature-based attractions	Maintain trails & local outdoor tourism	Eco-tourism initiatives & community-driven projects
<b>Aboriginal Tourism Development</b>	National Indigenous tourism strategy	Investment in cultural centres & experiences	Promote Indigenous-led tourism experiences	Connect cultural trails across multiple regions	Local storytelling & community engagement	Place-based Indigenous tourism hubs
<b>Infrastructure &amp; Accommodation</b>	Federal funding for large-scale tourism infrastructure	Encourage private sector investment in accommodations	Develop regional tourism precincts	Support growth of unique accommodations (e.g., eco-lodges)	Local zoning & regulatory support	Boutique accommodations tied to heritage & environment
<b>Regional &amp; Business Support</b>	Economic policies to support tourism growth	Grants & incentives for regional businesses	Support for industry clusters	Strengthen collaboration between businesses	Direct support for small businesses	Place-based tourism initiatives & partnerships
<b>Technology &amp; Data Utilisation</b>	National tourism insights & AI-driven marketing	State-wide digital tourism infrastructure	Develop visitor experience apps & digital tools	Integrate smart tourism strategies	Improve local digital accessibility	Interactive maps & smart signage

Table 1: Alignment of tourism strategies across government tiers

In summary, each level has its own role to play in delivering the nations tourism goals.

At the higher government levels (national, state), there is a strong focus on funding, policy and large-scale investments.

At the mid-levels (regional, sub-regional), there is a clear remit to drive destination branding, collaboration, and experience development.

At the local and place level, there is a focus on implementation, community engagement and tourism service delivery.

It is clear from the research that sustainability, Aboriginal tourism, digital innovation, and agritourism are key cross-tier priorities.

## Benchmarking exercise

A benchmarking exercise was conducted to analyse tourism strategies in Yarra Valley, South Australia, Tasmania, Napa Valley, and the New Zealand Wairarapa region and the cities of Wellington, Christchurch, and Auckland.

The objective was to identify current tourism trends, industry challenges and emerging resourcing needs that could inform the City's Tourism Plan. Again, it was found that these trends aligned strongly with the current National and State tourism priorities.

A summary of the findings, along with the implications or considerations for the City, is provided in this next section.

## Key tourism trends

Trend	Case Study
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Sustainability and responsible tourism  
Climate-conscious travel initiatives (e.g. Tasmania's focus on emissions reduction).  
Investment in sustainable infrastructure (eco-trails, boardwalks, and conservation-focused tourism).  
Integration of Indigenous values through Traditional Owner and Māori-led experiences.

***Cradle Mountain-Lake St Clair National Park***  
*Cradle Mountain-Lake St Clair National Park is a leading example of sustainable tourism in Tasmania. The park has implemented responsible tourism practices, including limited visitor numbers during peak seasons, and a focus on eco-friendly infrastructure such as low-impact boardwalks and recycled materials for facilities.*  
*The park is a part of the Tasmanian Wilderness World Heritage Area, which ensures that tourism activities are closely monitored to preserve its natural beauty and biodiversity. Visitors are encouraged to respect the fragile ecosystems by following strict guidelines to avoid trampling delicate vegetation and disturbing wildlife.*



Source: Alltrails

Wellness and experiential travel  
Growing demand for wellness  
tourism (Yarra Valley and  
Tasmania) with a focus on mental  
well-being and high-yield visitors.

### *The Barossa Valley*

*The Barossa Valley has embraced the intersection of wine tourism and wellness. Wineries like The Louise offer wellness packages that incorporate luxury spa treatments, yoga sessions, and vineyard walks. These experiences provide an opportunity for visitors to connect with both the land and their own wellbeing.*

*In addition, vineyard yoga is becoming increasingly popular in the region, allowing visitors to practice yoga surrounded by scenic vineyards, enhancing both mental relaxation and physical health. The region also promotes spiritual well-being with tours designed around the local history and culture, offering guests deeper emotional and spiritual connections to the land.*



Source: The Louise

Diversification of experiences  
Expanding night-time and midweek economies to reduce reliance on peak seasons.  
Encouraging multi-day itineraries and regional dispersal to boost longer stays.  
Growth in cycling, outdoor adventure, and dark sky tourism (e.g., Wairarapa's astro-tourism).

### *Christchurch Adventure Park*

*Christchurch Adventure Park integrates sustainability into its operations by using solar power for energy, ensuring that the park's infrastructure is low-impact and energy-efficient. Additionally, the park has a strong focus on environmental education, teaching visitors about local ecosystems and sustainable practices.*

*The park offers activities like mountain biking and zip-lining, where guests are encouraged to respect wildlife and minimise their environmental impact.*



Source: Christchurch Adventure Park

Food and wine tourism  
Strong emphasis on premium local produce, agritourism, and food festivals to drive regional tourism.  
Cross-sector collaborations to extend food and wine experiences beyond traditional venues.

### Tasmania

Tasmania is known for its premium local produce, including cheese, seafood, truffles, berries and wine. The region emphasises agritourism experiences through farm tours, artisan product tastings, and food-centric events. For example, The Agrarian Kitchen in New Norfolk offers farm-to-table dining experiences where visitors can tour the farm, learn about food production, and enjoy meals prepared with fresh, locally sourced ingredients.



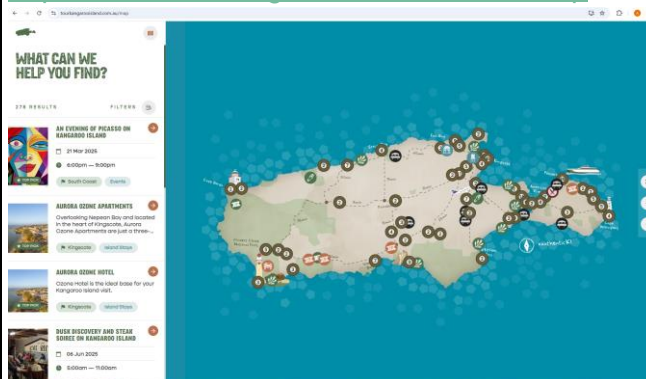
Source: The Agrarian Kitchen

Technology and digital integration  
Seamless digital experiences, from mobile apps to real-time visitor information (e.g., Tasmania's technology-enabled travel).  
Improved data centralisation to enhance visitor analytics and decision-making.


### Kangaroo Island interactive map:

Kangaroo Island offers a digital interactive map that guides visitors through major eco-tourism attractions like Flinders Chase National Park. It highlights key trails, viewpoints, and conservation efforts while providing real-time updates on park conditions and activities.

<https://www.tourkangarooisland.com.au/map>



Source: Tour Kangaroo Island

<p>Luxury and exclusive travel experiences High-end tourism growth, including luxury accommodations and exclusive, limited-access experiences.</p>	<p><i>Saffire Freycinet</i> <i>Saffire Freycinet is one of Tasmania's most exclusive luxury retreats, offering an all-inclusive experience with panoramic views of Freycinet Peninsula. Located in the Freycinet National Park, this five-star lodge offers personalised experiences such as private helicopter tours, wine tastings, and exclusive guided hikes through pristine natural landscapes. The private access to some of Tasmania's most iconic destinations, like the Bay of Fires, enhances the prestige of this experience</i></p>  <p>Source: Saffire Freycinet</p>
<p>Investment in infrastructure and digital connectivity Enhancing interaction with natural assets (e.g., Overland Track's eco-trails in Tasmania). Improved digital connectivity, including mobile coverage, interactive digital maps, and online booking systems (e.g., Kangaroo Island).</p>	<p><i>Yarra Ranges tourism</i> <i>Yarra Ranges Tourism has been actively advocating for the development of tourism infrastructure, recognising the importance of both public and private sector investments in enhancing the visitor experience. While specific digital infrastructure projects are not detailed, the organisation emphasises the need for infrastructure that meets contemporary visitor expectations, which increasingly include digital connectivity and services.</i></p>

## Key industry challenges identified

### Workforce sustainability and skills shortage

- Labour shortages in tourism and hospitality (noted in Tasmania and Yarra Valley)
- Need for better workforce training and retention programs.

### Infrastructure gaps and investment needs

- Transport and accessibility challenges including hop-on-hop-off services, expanded parking and EV charging
- Accommodation shortages across various price points (Yarra Valley, Wairarapa).

### Balancing growth with environmental and community wellbeing

- Concerns over over-tourism and community impact (Tasmania, Wellington)
- Need for community-centred tourism development to balance economic and social benefits.

### Tourism seasonality and dispersal

- High concentration of visitors during peak seasons leading to economic instability
- Remedial strategies could include developing off-season tourism and night-time events to spread demand.

## Emerging resourcing needs

- Workforce development: addressing staffing shortages through training programs and employment incentives
- Infrastructure investment: expansion of public transport, accommodations, and sustainability infrastructure
- Data and insights hub: a centralised tourism data system to support regional tourism planning
- Cultural training and indigenous partnerships: encouraging businesses to integrate Indigenous tourism experiences.

## Summary of findings

The recurring theme across sectors is integration – tourism is not an isolated industry. The key to success lies in collaborative policies, innovative business models, and cross-industry partnerships that create holistic, resilient tourism ecosystems.

- Sustainable tourism growth is a priority – strategies focus on integrating agritourism, eco-tourism, and nature-based experiences while ensuring responsible visitor management and conservation-driven tourism
- Collaboration is essential for success – there is a strong emphasis on partnerships between local, state, and national governments, as well as collaboration with private sector investors, Indigenous communities, and tourism operators
- Indigenous tourism is a key focus area – efforts include positioning Aboriginal tourism as a core attraction, increasing Indigenous participation in tourism, and developing authentic cultural experiences with dedicated resources
- Infrastructure and accessibility require improvement – plans should emphasise upgrading visitor infrastructure, expanding short-stay accommodations, improving transport connectivity, and enhancing signage to improve the overall visitor experience
- Destination branding relies on authentic storytelling – strategies include identifying storytellers, supporting agritourism and Indigenous narratives, and aligning digital marketing with consumer demand
- Economic growth is tied to investment in tourism – encouraging private sector investment, supporting small business development, and fostering regional business clusters are seen as key to driving economic benefits
- Workforce development is critical for a high-performing industry – addressing employment shortages through vocational training, skills programs, and incentives for workforce retention is a key concern

- Data-driven decision making is encouraged – access to consumer insights, sentiment tracking, and innovative technologies is seen as crucial for shaping visitor experiences and improving tourism offerings.

## Implications for the City of Swan

The benchmarking analysis highlights a shift towards high-value, sustainable tourism, with a focus on eco-tourism, wellness, food and wine, and experiential travel. However, common constraints, include labour shortages, infrastructure gaps, and seasonality issues.

Strategic investment in sustainable tourism practices, workforce development and digital technology is critical for long-term growth. Collaboration between government, tourism operators, and local stakeholders will be essential in overcoming these challenges and ensuring that the City's tourism sector remains competitive and resilient.

## City of Swan tourism audit

The City has a number of established and emerging tourism destinations including the Swan Valley, Guildford, Midland, Bullsbrook and Gidgegannup. The tourism offering covers two key sub-regions in the Perth Metro area – the Swan Valley and Perth Hills. Both of these sub-regions offer distinct yet complementary tourism opportunities. The Swan Valley can be defined as the jewel in the crown of the City's tourism offering.

Renowned for its food, beverage, wildlife, and nature experiences, the Swan Valley sub-region is easily accessible from Perth's CBD and is set to benefit from the recently extended train service to Ellenbrook. Its historical connection to Perth's origins in fresh produce and wine adds to its appeal, and the Swan Valley Tourism Alliance (SVTA) plays a crucial role in promoting the region.

By collaborating with local businesses and stakeholders, the region can further develop its tourism offerings, such as guided tours, farm-to-table experiences and outdoor activities, all of which encourage visitors to extend their stays. The sub-region's unique strengths, including award-winning boutique distilled products and a growing range of experiences, position it as a key player in the region's tourism growth.

As value-adds to the Swan Valley, the neighbouring localities of Guildford and Midland both have their own opportunities for tourism development, with a rich history tied to Perth's colonial heritage, first contacts with existing Aboriginal settlements and its unique railway history.

In contrast, the Perth Hills sub-region, centred around the township of Gidgegannup, is less developed in terms of tourism products and therefore offers significant potential for growth. The sub-region has seen improvements in accommodation, catering to increasing visitor numbers with bed and breakfasts, guesthouses, and wellness properties. However, the area still lacks high-capacity hotels and relies on independent businesses and short-term accommodation.

The Perth Hills is particularly attractive to nature enthusiasts, with national parks and reserves offering hiking, mountain biking, and scenic drives. There are a range of City-managed and State-managed parks and national parks. To fully capitalise on these natural assets, there is a need to develop more bookable products, particularly in adventure tourism.

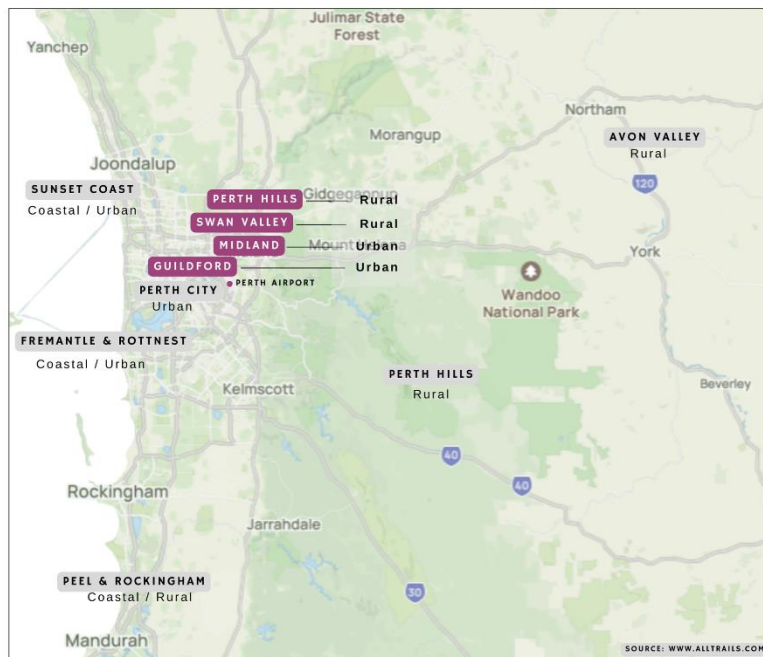
The region's historical and cultural attractions, both inside and outside of the City's boundaries, present opportunities to create unique tourism experiences.

The Perth Hills Tourism Alliance is crucial in promoting the region, and by fostering collaboration between local governments and the State Government, the development of new tourism products like agritourism, adventure tourism, and cultural experiences will help the area transition to a more mature phase of the tourism life cycle.

Together, these sub-regions have the potential to significantly contribute to the overall growth and sustainability of the Perth Metro area's tourism industry, with ongoing development and strategic planning helping to create a diverse and appealing destination for visitors.

# Audit – regional positioning

The City is unique to other Destination Perth sub-regions with its blend of cultural and historical significance, encompassing both Indigenous and post-colonial stories. The Swan River and the surrounding pristine bushland provide an ideal backdrop for cultural storytelling, adventure, and tranquillity. The region's strong viticulture and fresh produce, particularly in the Swan Valley, are unmatched in the Perth metropolitan area. Its built environment features a rich mix of historic buildings,



preserved for future generations, alongside the revitalised Midland area, where old and new seamlessly blend within a vibrant hub of business, shopping, and recreation. While rapidly developing into an urban centre, the City's close proximity to untouched nature creates a rare fusion of urban, rural, and natural landscapes.

In the Destination Perth Tourism Destination Management Plan, the Swan Valley and Perth Hills are identified as having emerging opportunities, with a need for development of heritage, Aboriginal Culture and adventure produces.

The following table describing the key development pillars as identified for Destination Perth provides a comparison of the maturity of the City's tourism product in comparison to other sub-regions.

ACTIVITIES, ATTRactions & EVENTS	AVON VALLEY	FREMANTLE & ROTTNEST	PEEL & ROCKINGHAM	PERTH CITY	SUNSET COAST	SWAN VALLEY	PERTH HILLS
NATURE/BIODIVERSITY	D	S	S	E	E	D	D
ABORIGINAL CULTURE	D	E	D	E	D	E	D
HERITAGE	E	S	E	S	D	E	D
ADVENTURE	E	E	E	E	E	D	D
EVENTS & FESTIVALS	E	S	E	S	E	E	D

### LEGEND

- S** SIGNATURE: Product well established and represented in destination marketing.
- E** EMERGING: Product is established, growing representation in destination marketing.
- D** DEVELOPMENT OPPORTUNITY: Limited established product.

Table 3: Development pillars DP

Source: Destination Perth Tourism Destination Management Plan

# Local overview

There are currently several attractions or tourist hot spots that anchor the City's tourism offering. These are well marketed within the Swan Valley website, brochures and other marketing collateral. The nature of these hot spots varies greatly and over the last ten years, the destinations have evolved as Midland, the peripheral suburbs of the Swan Valley and Bullsbrook have shifted from a rural/semi-rural to a metropolitan and urban region. Though there are points of interest scattered across the City, there is a strong spine of interest commencing at the Guildford heritage precinct, just north of the Perth Airport, leading through the Swan Valley and finishing at Bullsbrook in the north. The City's tourism audit identified the following tourism highlights:

## City of Swan tourism audit

### Swan Valley

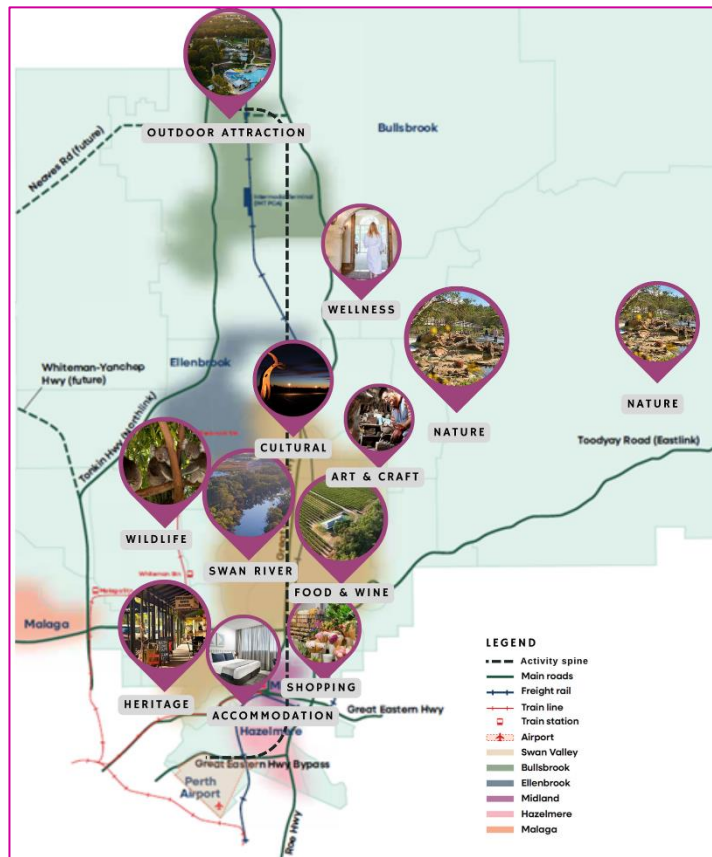
Over the years, the City has leveraged the unique strengths of the historic value and rural aesthetic of the Swan Valley's ties to viticulture and fresh produce. In more recent years, the City has begun to market its natural assets along the Swan River and Perth Hills. The development of the Yagan Memorial Park, conducted by the City in collaboration with the Department of Indigenous Affairs, offers cultural and historical education to visitors. Over the last decade, there has also been an increasing focus on the artisans of the Swan Valley and a range of health and wellness offerings which have emerged.

### Guildford

Guildford has been promoted for its heritage significance. Guildford, one of the earliest settlements in Western Australia, is known for its historic buildings and streetscapes. It has long been an important site for Noongar people, with many camp and spiritual locations used from pre-contact times to the present. Often referred to as the 'gateway' to the Swan Valley, Guildford is also home to the Swan Valley Visitors Centre.

### Midland

Redevelopment in Midland has brought about new opportunities for targeted promotion. The Old Railway Workshops site has had significant investment in public infrastructure including Railway Square. There may be future tourism potential with underused or vacant workshops. With many visitors to the hospital precinct and university campus, including international students, a new target audience has emerged for the area. Furthermore, the City has invested significant funds into the New Junction redevelopment which has introduced an iconic recreation space for events along with play spaces for children and youth of all ages. Also located within the precinct is the privately operated mini-golf on The Crescent. There is also an existing food and



beverage precinct along Cale Street, adjacent to the existing Midland Gate Shopping Centre. To the west of this shopping district is the newly developed Quest Apartments, centrally located as a nexus between the tourism hotspots of Midland, Guildford and the Swan Valley.

### Upper Swan (Bells Rapids)

The City celebrates and maintains conservation efforts to contribute the preservation of its natural reserves and water bodies including Bells Rapids Park. In the 2024 Autumn edition of the Swan Valley Magazine, the City marketed the park as one of the City's most 'Instagram-able' places. Bells Rapid Park is also a key site for providing fantastic vantage points for the annual Avon Descent.

### Gidgegannup

Situated within the Perth Hills Tourism Alliance boundaries, Gidgegannup is gaining popularity as a tourist destination. The area is known for its diverse attractions, including Noble Falls, FR Berry Reserve, accommodation, health retreats, walking and horse trails, events, as well as food, wine, and picnic experiences. The Red Hill Auditorium brings many people to Gidgegannup each year. Key tourism events, such as the Gidge Show and the Small Farm Field Day, also draw visitors to the region.

### Bullsbrook

	<p>There are two major national parks located within the Bullsbrook locality, namely Walyunga National Park and Avon Valley National Park. The town centre is fast developing from a small rural centre to an urban hub, rendering opportunities to service and accommodate tourists. The privately operated Perth Outback Splash has become a major tourist attraction over the last five or so years, with its rebranding and the opening of the new slide tower in 2019.</p>
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## Visitor snapshot

The 2024 Swan Valley visitor research project investigated visitation patterns, visit motivations, pre-visit information sources, and levels of expenditure. Key findings indicate that Swan Valley visitors are:

- More likely to visit on the weekend
- Seven in 10 visited on the weekend, while almost a third visited during the week
- Reid Highway was by far the most common road to enter or leave the Swan Valley
- Most visitors arrived in the late morning and left in the mid to late afternoon
- Most visitors arrived in the late morning and left in the mid to late afternoon with just over four in 10 staying for three to four hours
- Roughly a third visited the Swan Valley with their partner or with friends.

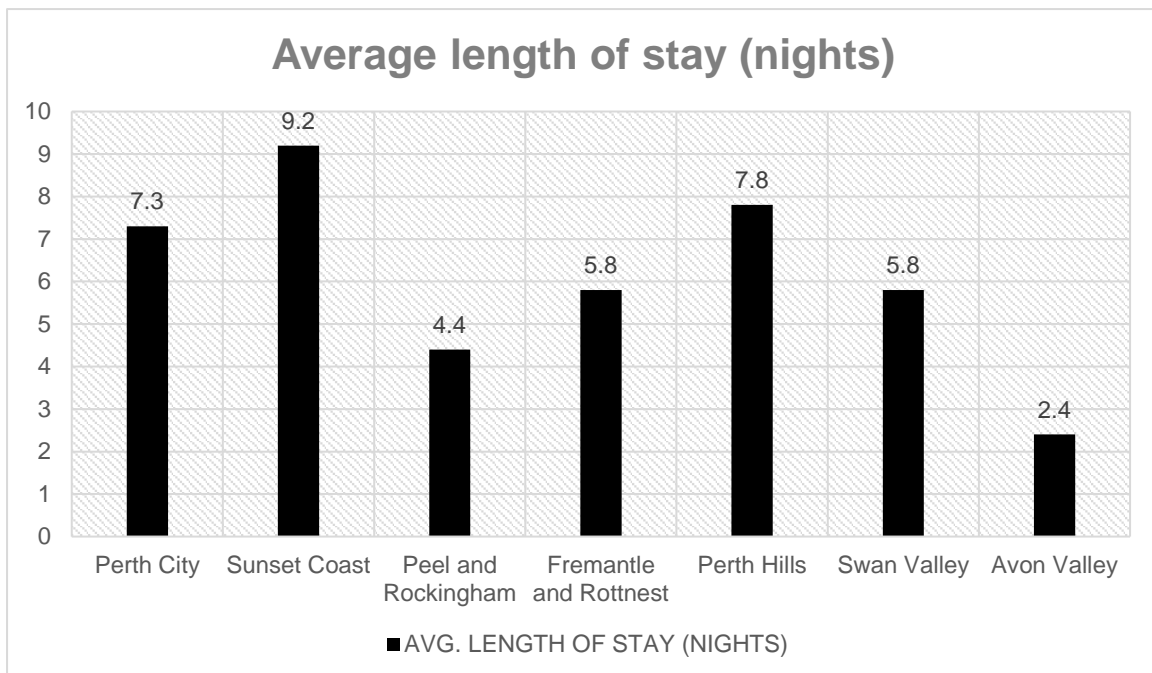
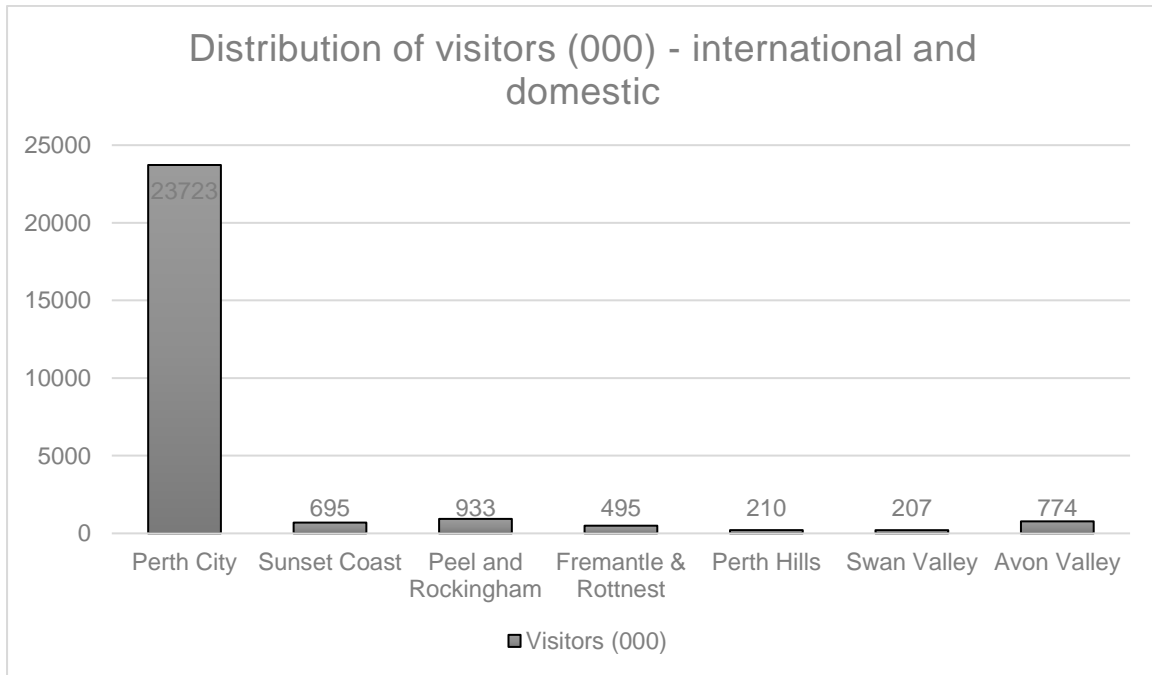
The most common reason for visiting the Swan Valley is to go out for food and drinks and for an outing with family or friends. Other findings included:

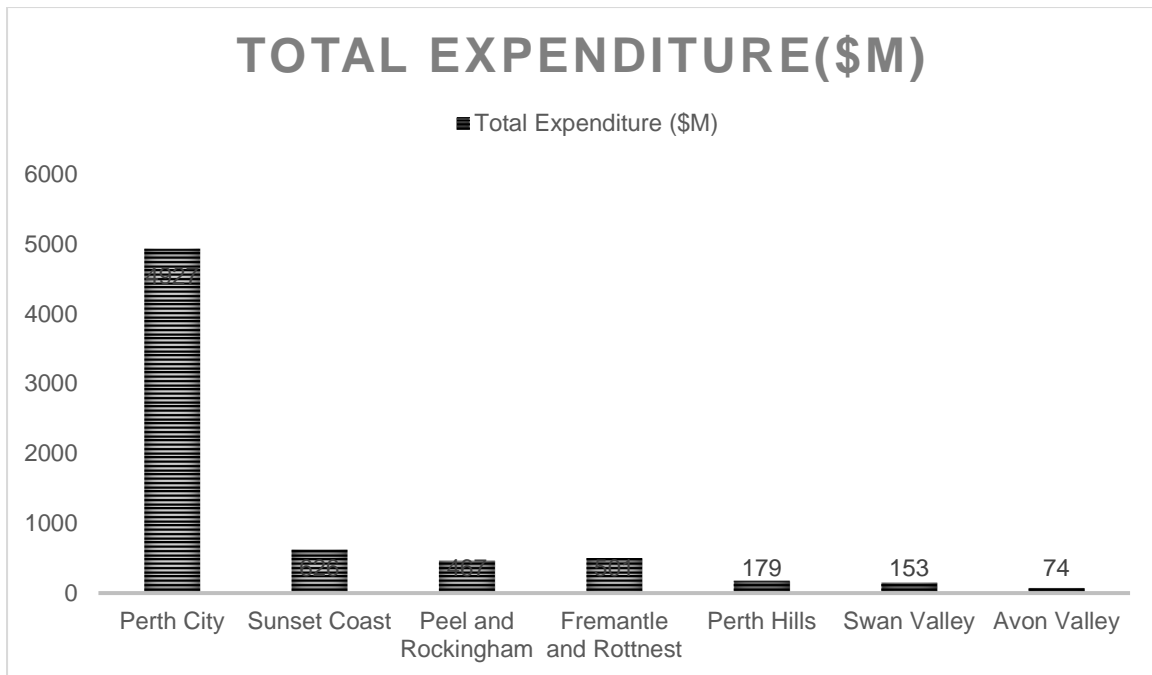
- Visitors did not spend all their time or money in one location
- On average, 2.93 venues were visited
- Those that spent over four hours in the Swan Valley went to at least four different venues on average
- Almost half of Swan Valley visitors only made planned stops on their visit. Additionally, just under one in five used social media to plan their visit
- Experience of a venue was also the main reason for stopping by unplanned locations. Eight in 10 indicated recommendations from others has a strong influence on making an unplanned stop
- More than nine in 10 visitors had a positive experience
- The atmosphere and ambience are what visitors liked the most, followed by the choice of dining venues, breweries and wineries
- Almost nine in 10 visitors would be likely to return to the Swan Valley in the next 12 months
- In particular, visitors were very satisfied with the aesthetics of the Swan Valley
- Telephone reception and Wi-Fi coverage was rated differently across demographics
- Among those using social media to plan their visit, Facebook and Instagram are the most used by almost six in 10
- Over four in 10 have used the Swan Valley website before, with just under one in 10 doing so for their latest trip
- Just over 1 million Perth metro residents have visited the Swan Valley in the last 12 months
- There was a total of 4.4 million visits to the Swan Valley in the last 12 months, generating a total of \$544 million in expenditure.

Suggestions for improvements:

- Transport options
- Traffic and road safety
- Coverage
- Directions to/signage for attractions
- Road signage
- Aesthetic or general feel of the area
- Attractions/events/venues
- Specific activities
- Account for more demographics
- Dining options.

The Destination Perth Tourism Destination Management Plan 2024 provides a breakdown of visitation which compares Swan Valley and Perth Hills key visitation numbers and data around the number of nights stay and expenditure with other Destination Perth regions. The data shows that Swan Valley and Perth Hills are the lowest visited areas within the Destination Perth sub-region. However, this does not correlate with the average length of stay or the amount spent per visitor.

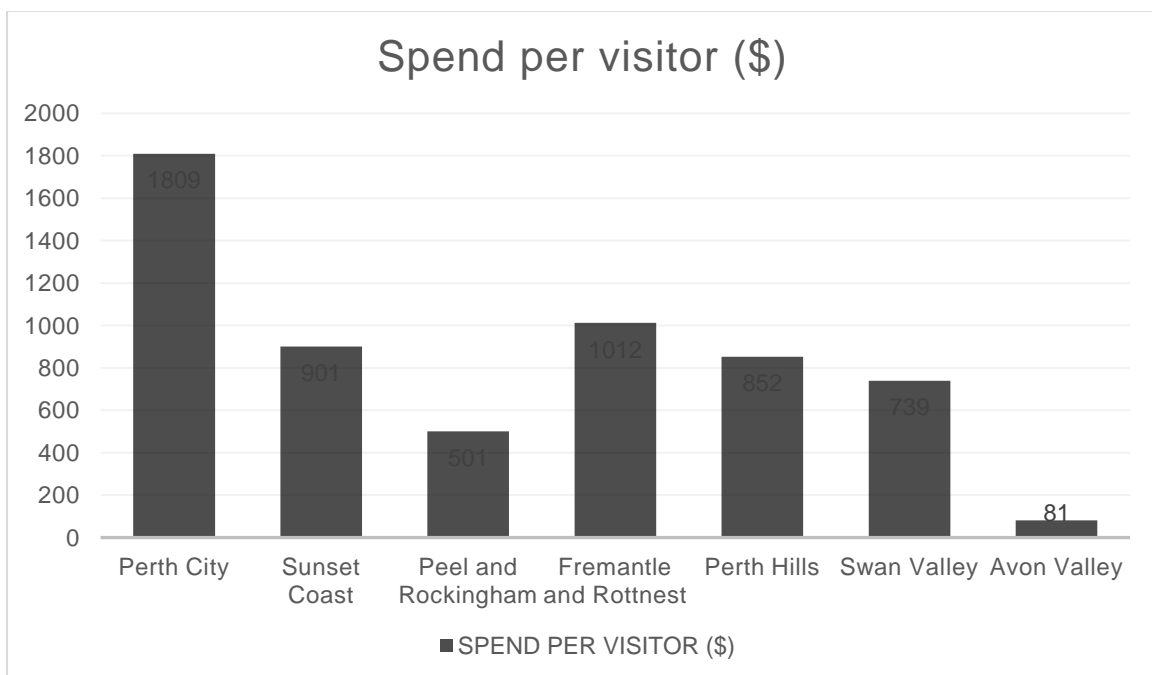




The national visitor spend target is \$230 billion by 2030 and the State's target outcome is \$25 billion by 2033. In December 2019, the total visitor spend nationally was \$166 billion and in 2022, the State's total visitor spend was \$14 billion.

The total visitor spend for the Destination Perth region was \$6,927,000, of which \$153 billion was spent in the Swan Valley and \$179 billion in the Perth Hills sub-region (2022 plus 2023 average).

This data is older than the Swan Valley visitor research and so the lower numbers may be reflective of the post COVID-19 recovery.



The Destination Perth Tourism Destination Management Plan also describes the key Perth tourist profiles. A summary of these customer types is provided below:

#### Heritage experience

- Travellers interested in history and Indigenous activities.

#### Nature experience

- Travellers seeking immersion in natural environments and wildlife.

#### Immersive experience sector

- Travellers seeking personal growth through learning, agritourism, and ecotourism
- Not a primary focus for most visitors but has potential
- Key experiences: cheese/chocolate making, Aboriginal craft workshops, eco-tours, and agritourism in Avon Valley, Perth Hills, and Swan Valley.

#### Interest experience sector

- Travellers driven by hobbies and passions
- Opportunity to develop dark sky tourism.

Other market interests identified are as follows:

#### Premium nature

- High-spending (\$332 per person per night) adventure travellers
- Interests: wilderness, sustainable tourism, wildlife, coastlines, and Aboriginal experiences.

#### Simple nature

- Lower-budget nature travellers (\$121 per person per night)
- Interests: camping, road trips, and immersion in nature and wildlife.

#### Family time

- Families on coastal holidays (\$172 per person per night)
- Interests: beaches, adventure activities, and nature
- Opportunity to attract intrastate travellers.

#### City social

- Travellers seeking city energy and nightlife (\$222 per person per night)
- Interests: sporting events, festivals, nightlife, food and wine.

#### Luxe culture

- Luxury travellers staying in high-end hotels (\$230 per person per night)
- Interests: shopping, dining, culture and heritage
- Accessibility is key to growing this market.

## Current Tourism Services – City of Swan

The City of Swan offers many services and activities, both direct and indirect, to support tourism development and growth within the City. These include:

### Direct:

- Tourism Services
  - Operate Swan Valley Visitor Centre to service business community and visitors (Monday to Sunday, 9am – 4pm)
  - Maintain and update West Swan Road information bay as required
  - Relationship management
  - Deliver Tourism Industry Partnership Program
  - Internal and external familiarisation programs
  - Manage funding and release of funds
  - Manage collateral to market business with visitors
  - Manage tourism signage
  - Tourism Implementation Group
  - Participation in the both the Swan Valley and Perth Hills Tourism Alliances
  - Promote Guildford's heritage and tourism sector
  - Participate in tourism panels
  - Tourism award application assessments
  - Manage relationships with industry and peak bodies.
  
- Communications and Engagement
  - Manage and improve the City's brands (including Swan Valley) Coordinate the City's flagship public events including Avon Descent Family Weekend, Entwined in the Swan Valley, Harvest Festival and Others
  - Manage the City's websites (Corporate, Swan Valley and Intranet) and social media accounts – at least two social media posts per day and three proactive social media initiatives per month with a focus on driving engagement
  
- 

### Indirect and Support Business Units:

- Economic Development
  - Distribution of regular business newsletter to more than 2,000 recipients
  - Interactive welcome brochure distribution to new businesses
  - Business directory
  - Aboriginal business directory
  - Advice on how to become an accessible business (improve access, be age-friendly, hire people with a disability) through the use of accessibility checklists developed for the City
  - City of Swan community partnership grants
  - Digital marketing workshops
  - City support for the Swan Chamber of Commerce
  - Subsidised business mentoring program
  - Annual Swan Jobs Expo to connect businesses with employees

- Provide accessible information to businesses (Swan Biz News, Swan Biz List, Touchpoint, business website and communications, business environmental scanning)
- Community Arts, Culture and Funding Services
  - Cultural hub contract management (Midland Junction Arts Centre and Ellenbrook Arts)
  - Develop and expand community arts program
  - Develop marketing opportunities
  - Develop strong local partnerships
  - Develop art-based activation initiatives and programs
  - Develop an activation zones program
  - Develop service agreement with commercial providers of event-based services
  - Manage events equipment and pop-up play infrastructure, City activation zones and service agreements
- Asset Planning and Management Services
  - Asset management planning
  - Condition surveys for roads, natural environment, bridges, bus shelters, park lighting and buildings
- Building Approval Services
  - Building approvals
- Design and Project Delivery
  - Deliver approved capital works program as aligned to the City's key strategies and plans
- Construction and Maintenance
  - Manage incoming work requests
  - Manage graffiti removal
  - Undertake building and engineering asset inspections
- Planning Approval Services
  - Manage development applications
- Strategic Land Use Services
  - Manage the City's Local Planning Strategy
  - Manage the Local Planning Scheme
  - Provide internal and external strategic land use planning advice
- Natural Area Management
  - Deliver natural environment maintenance programs including rubbish removal, weed control and revegetation
  - Deliver water quality improvement projects in the Bennett Brook Catchment (revegetation and restoration of properties, water quality monitoring, waterway related grants applications and delivering environmental educational workshops for residents and schools)
- Park and Reserve Maintenance
  - Deliver planned park maintenance programs
- Community Care and Aged Services
  - Manage clubs and outing groups
- Community Safety
  - Manage dog and cat services and programs including the annual renewal registrations
  - Manage illegal dumping
  - Manage abandoned vehicles
- Emergency Management

- Deliver the Prescribed Burns Program
- Maintain the City's bushfire risk management system

## **Opportunities and constraints**

The research analysis has identified both opportunities and challenges, which are outlined below for use in the stakeholder engagement during the next project phase. These opportunities directly tie back to the research findings, addressing both the emerging priorities and challenges while considering a local government's potential role in each area. It is intended that this will inform the City's Tourism Plan objectives, priorities and actions.

A key finding from the research is that successful tourism development relies on cross-sector integration. Achieving success depends on collaborative policies and cross-industry partnerships that create resilient tourism ecosystems.

## Key opportunities

Several key areas for further investigation were identified, which can be translated into pillars of opportunity for the City to consider in the formation of the action plan. At a high level, these include:

Cross-sector opportunities	City's role	Suggested destination/s
<b>Winemaking, agritourism and food-based tourism</b>		
- Support farmers diversifying their businesses for tourism (e.g., farm stays, food festivals).	- Facilitate partnerships between local farmers, agritourism operators, and tourism bodies and explore possible itineraries and new trails.	Swan Valley Gidgegannup Bullsbrook?
- Promote local food and produce as part of broader tourism experiences.	- Invest in infrastructure (roads, signage, digital tools) to improve accessibility to agritourism sites.	Swan Valley Gidgegannup Bullsbrook?
- Foster collaborations between agriculture and tourism sectors to create sustainable experiences.	- Work with the Department of Water and Environmental Regulation (DWER) to develop a water licensing system tailored to Swan Valley farms and tourism operators.	Swan Valley Gidgegannup Bullsbrook?
<b>Indigenous and cultural tourism</b>		
- Invest in Aboriginal-owned tourism businesses and cultural experiences.	- Partner with Chamber of Commerce of other peak bodies to provide capacity-building programs to encourage Indigenous participation in tourism.	Swan Valley Bullsbrook Guildford
- Develop cultural tourism precincts, guided storytelling tours, and art markets.	- Support development of cultural tourism policies that align with the City's Reconciliation Action Plan, community values and economic development goals.	Swan Valley Bullsbrook Guildford Midland
- Integrate Aboriginal values into broader tourism offerings.	- Collaborate with Indigenous communities to integrate AR-based cultural and environmental education for visitors.	Swan Valley Guildford
- Leverage AR for immersive storytelling and interactive cultural experiences.		Swan Valley Guildford
<b>Sustainability and eco-tourism</b>		

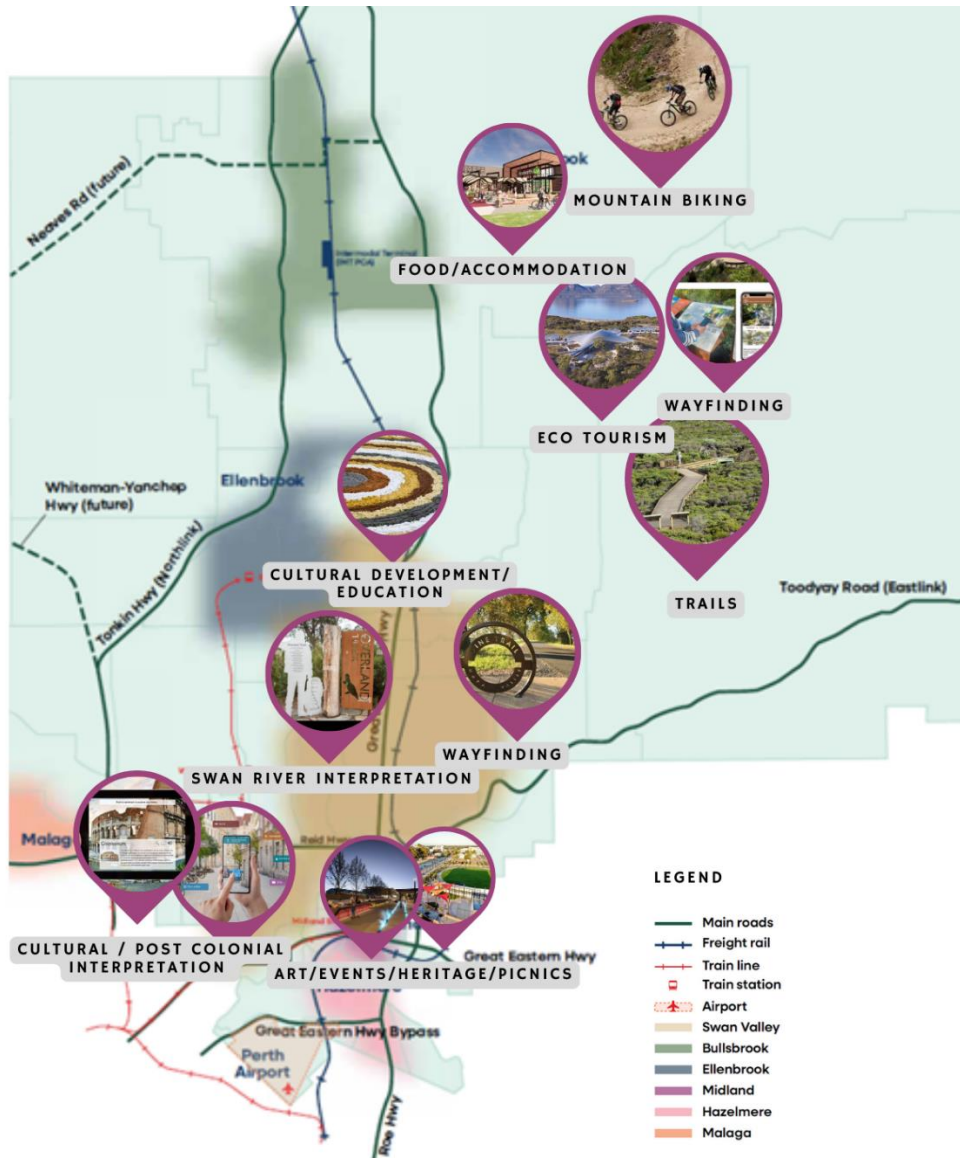
- Promote eco-tourism and nature-based experiences while supporting conservation-driven tourism and responsible visitor management.	- Invest in sustainable infrastructure, including eco-trails, City managed parks/bushland, and waste-reduction initiatives.	Swan Valley Gidgegannup Bullsbrook
- Encourage eco-certifications and sustainable business practices and eco-certifications to attract environmentally conscious travellers.	- Implement policies balancing tourism growth with environmental preservation, including visitor caps and low-impact activities.	Swan Valley Gidgegannup Bullsbrook
- Develop eco-friendly accommodations, such as low-impact lodges and sustainable camping sites.	- Mitigate flood risks and rehabilitate the Swan River and review flood-prone areas to manage land use and development restrictions.	Swan Valley Gidgegannup Bullsbrook
- Incorporate nature-based adventure tourism (e.g., hiking, kayaking, horse-riding and cycling trails) that emphasises minimal environmental impact.	- Enhance river conservation efforts to support eco-tourism.	Brigadoon Gidgegannup Bullsbrook Swan Valley
<b>Visitor experience and product development</b>		
- Develop immersive experiences in agritourism, Aboriginal cultural tourism, and adventure tourism.	- Lead and support destination branding efforts, emphasising local, authentic experiences and sustainable practices.	Swan Valley Guildford Brigadoon Bullsbrook
- Enhance the visitor experience through improved infrastructure (e.g., signage, wayfinding, digital tools) and diversified accommodation options (e.g., eco-lodges, boutique stays).	- Collaborate with tourism operators to develop and promote a cohesive regional tourism offer. Also focus on opportunities to increase day trips from incoming cruise ships at Perth ports.	Swan Valley Guildford Bullsbrook
- Enhance visitor infrastructure (e.g., signage, accommodation) and diversify offerings.	- Invest or explore partnerships to develop immersive, digitally enhanced experiences (AR) to bring stories, culture, and nature to life for visitors - Investing in digital and physical visitor information points, interactive kiosks, and multilingual resources to improve wayfinding and engagement.	All

- Expand adventure tourism offerings, particularly mountain biking trails and eco-friendly adventure tourism that attracts both local and international tourists.	- Expanding real-time visitor assistance through chatbots, apps, and AI-driven recommendations to personalise experiences.	Swan Valley Guildford Brigadoon Bullsbrook
- Use consumer insights and data to shape tourism products that align with market demand, focusing on experiential tourism and the rise of digital immersive experiences (AR/VR).		All
<b>Infrastructure and accessibility development</b>		
- Address infrastructure gaps by upgrading roads, expanding public transport options, and improving digital services to ensure smooth visitor experiences.	- Lead or advocate for infrastructure planning and investment to support tourism, focusing on connectivity, public transport, and digital infrastructure.	All
- Improve access to tourism sites, particularly for nature-based and adventure tourism, through investments in trails and transport systems.	- Work with stakeholders to secure funding for infrastructure, focusing on long-term sustainability.	Swan Valley Gidgegannup Brigadoon Bullsbrook
- Enhance accommodation infrastructure to meet demand, particularly in underserved areas.	Investment attraction	All
- Build and upgrade mountain biking tracks, nature trails, and eco-friendly adventure routes that attract adventure tourists year-round.	Advocacy, investment attraction and stakeholder liaison	Swan Valley Gidgegannup Brigadoon Bullsbrook
- Address infrastructure gaps by upgrading roads, expanding public transport options, and improving digital services to ensure smooth visitor experiences.	- Investing in smart signage, QR-code-based trails, and multilingual resources to improve visitor navigation - Ensure access to adventure tourism sites is enhanced with digital mapping, guided tours, and AR-based interpretive experiences.	All
<b>Economic Development and Investment</b>		

- Attract private sector investment for new tourism products and services.	- Provide incentives for private sector investment in tourism infrastructure and businesses.	All
- Foster regional business clusters combining tourism with agriculture, culture, and sustainability.	- Offer business development support and collaborate with regional economic development agencies or Swan Valley Tourism and Perth Hills Tourism Alliances to further develop tourism clusters.	All
- Support small businesses, particularly Indigenous and agritourism operators.	- Prioritise investments in adventure tourism experiences and digital innovations like AR-guided tours.	All
<b>Workforce development and training</b>		
- Develop vocational training programs and targeted employment initiatives.	- Partner with educational institutions, industry bodies, and employers to create targeted workforce development programs.	All
- Promote cross-industry talent mobility (e.g., transitioning between agriculture, hospitality, and tourism).		
- Address skill shortages in adventure tourism sectors (e.g., mountain biking instructors, eco-tourism guides).		
<b>Technology and digital transformation</b>		
- Use consumer insights, sentiment analysis, and AI tools to shape tourism offerings and marketing.	- Support the development of digital infrastructure (high-speed internet, apps, online booking systems) to enhance visitor experiences.	All
- Enhance digital visitor experiences (apps, real-time info, online itineraries).	- Encourage local businesses to adopt digital tools and technologies to stay competitive.	All
- Leverage AR for immersive and interactive experiences that bring culture, nature, and history to life.	- Invest in innovative digital platforms (AR) to create immersive experiences and engage visitors before, during, and after their trips.	All
<b>Marketing and branding</b>		
- Promote unique experiences through integrated marketing strategies (e.g., agritourism, Indigenous culture, adventure).	- Develop a unified regional brand that highlights local cultural, natural, and agricultural assets.	All

<ul style="list-style-type: none"> <li>- Position the region as a destination for high-quality, immersive tourism experiences (e.g., eco-tourism, cultural heritage).</li> </ul>	<ul style="list-style-type: none"> <li>- Use digital marketing tools to target specific visitor segments, including food, adventure, and eco-tourism enthusiasts.</li> </ul>	<p>All</p>
<ul style="list-style-type: none"> <li>- Engage in digital storytelling using AR and immersive media to enhance destination identity.</li> </ul>	<ul style="list-style-type: none"> <li>- Use storytelling in marketing campaigns, incorporating local Indigenous culture, history, and sustainable practices.</li> </ul>	<p>Swan Valley Guildford Bullsbrook Gidgegannup</p>
<ul style="list-style-type: none"> <li>- Leverage local storytellers to create authentic and engaging narratives about the region.</li> </ul>	<ul style="list-style-type: none"> <li>- Implement data-driven marketing strategies using visitor analytics and consumer insights to refine marketing efforts.</li> </ul>	

At a high level, the following map highlights areas for development and improvement geographically:



## Key constraints

- Budget constraints
  - Financial resources may be limited, making large-scale infrastructure projects or long-term investments in technology and adventure tourism challenging
  - The City may need to prioritise funding for immediate needs while planning for future investments.
- Regulatory hurdles
  - Navigating land-use zoning, environmental regulations, and tourism-specific policies can delay or complicate project implementation
  - Ensuring compliance with both local and state regulations while promoting tourism growth requires careful coordination.
- Stakeholder management
  - Engaging diverse stakeholders, including Aboriginal communities, tourism operators, local businesses, and residents, can lead to differing priorities and potential conflicts
  - Managing these relationships and balancing competing interests requires effective communication and collaboration.
- Infrastructure limitations
  - Existing infrastructure (e.g., roads, accommodation, public transport) may be insufficient to meet growing tourism demand, particularly for adventure tourism
  - Upgrading infrastructure requires significant investment and careful planning to ensure long-term sustainability, including integrating digital enhancements like AR.
- Workforce shortages
  - The City may face difficulties in addressing the skills gap in the tourism sector, especially in specialised areas such as adventure tourism and digital technologies
  - Providing adequate training programs and incentives to attract and retain workers in tourism roles is critical but resource intensive.

## **Conclusion and next steps**

This background paper demonstrates that there is a strong alignment between national, state, and local policies and strategies aimed at developing the nation's tourism sector. It outlines clear priorities for the City to consider in preparing the Tourism Plan. The next step involves engaging internal and industry stakeholders in a comprehensive consultation process. Following this, a full plan will be developed to serve as a strategic roadmap for the implementation.



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