

# Report on the Tourism Impacts of “North Port Quay” Fremantle

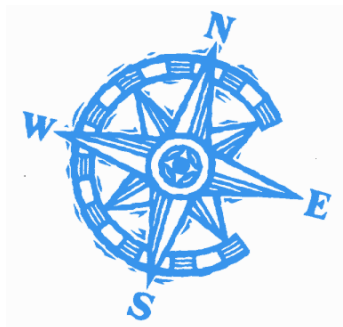
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## Table of Contents

1.0	INTRODUCTION	2
2.0	EXECUTIVE SUMMARY	4
3.0	OVERVIEW OF WESTERN AUSTRALIAN TOURISM MARKET	6
4.0	OVERVIEW OF PERTH REGION TOURISM MARKET	8
5.0	NORTH PORT QUAY'S TOURISM INFRASTRUCTURE, PRODUCT AND EXPERIENCES	11
6.0	ESTIMATED MARKET DEMAND AND ECONOMIC IMPACT	13
6.1	Short-Stay Accommodation And Other Tourist Expenditure	13
6.2	Performing Arts Centre	14
6.3	Visitation	15
6.4	Employment Estimates From Tourism Impacts	16

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## 1. INTRODUCTION

Tourism Co-ordinates has been engaged by Benchmark Projects to provide an assessment of the impact on tourism of the proposed “North Port Quay” development.

The developer of “North Port Quay” proposes a government and private sector project that would create a major new development zone incorporating spaces specifically designed to attract investment in synergistic tourism infrastructure. This is an opportunity that arises infrequently on this scale in Western Australia.

Tourism Co-ordinates believes that “North Port Quay” as proposed is a highly significant tourism development that will impact on both the supply and demand sides of the industry. This is a critical advantage of the project as the tourism industry is dependant for growth on both the supply of infrastructure and product and marketing driven consumer/tourist demand. This project can deliver critical supply components and drive demand.

That Western Australia is in need of investment in tourism infrastructure is evidenced in Tourism WA commissioned research<sup>1</sup> that identifies lagging accommodation supply as critical to Perth’s and by definition Western Australia’s tourism industry growth. That research identifies the critical impediments to hotel room supply as site availability and construction costs and as a consequence a lower than desirable return on investment for developers. The report concludes that “the market is placing a prolonged period of undersupply”.

North Port Quay as a major new “development zone” gives government and private developers the capacity to allocate and price land specifically to attract desired investors/developers of accommodation and other targeted infrastructure. The new “development zone” is also attractive to developers and operators/managers because of its capacity to incorporate synergistic infrastructure such as recreation , entertainment, retail, residential and commercial.

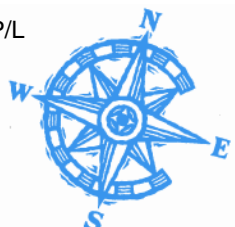
In a Western Australian context “North Port Quay” has similarities to the “Burswood Zone” and the synergies that it has with its infrastructure mix, making it a viable investment zone and marketable tourist precinct. At an international level close attention has been paid during planning to developments such as; Auckland Harbour – New Zealand, Singapore, Buenos Aires – Argentina, Oslo- Denmark, V & A Waterfront – South Africa and in Australia, Hope Island – Queensland.

“North Port Quay’s” capacity to incrementally drive demand stems from its products/experiences being new additions that are a match to the needs of Perth’s tourist consumer markets and that fill existing gaps in supply.

This report also considers it significant that “North Port Quay” represents an opportunity to grow Fremantle’s tourism industry without impacting on the City’s important heritage values.

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<sup>1</sup> Perth Hotel Investment Outlook-July2007- Transocean Consulting Services P/L



Specific components of the project that can meet supply needs and/or drive market demand include:

- development of a 1500 seat performing arts centre;
- development of 500 four to five star hotel rooms with convention facilities;
- development of a possible 1757 short stay apartments (20% of a total of 8785 apartments planned for the project, with an average of 1.5 rooms each) providing 2635 rooms;
- creation of a new one kilometre, protected, north-facing swimming beach, water activity theme park and surf reef;
- creation of two new canal–side family beaches;
- creation of a world class retail/entertainment precinct (9.39 ha);
- a 3.2 km recreational fishing platform (breakwater);
- 2,000 plus marina pens, 1,200 boat moorings and boat stacking.

and the opportunity for:

- the viable docking and operation of the “Duyfken” replica boat on its return and the Leeuwin training ship ( substantial government and public investments );
- additional prime self-contained, short-stay visitor accommodation, directly related to the marina and beachfront attractions;
- public/tourist transport services linking Fremantle and North Port Quay.

***The project creates the opportunity for the development of much needed new tourism infrastructure for which there is existing and growing demand.***



## 2. EXECUTIVE SUMMARY

- The proponent of “North Port Quay” proposes a government and private developer project that would create a new development zone designed to attract investment in synergistic tourism infrastructure, an opportunity that arises infrequently in this state and on this scale.
- “North Port Quay” as a major new development zone, with a planned tourism precinct, will overcome a number of obstacles that Western Australia currently faces in attracting investment in tourism infrastructure, in particular short stay accommodation. It will impact on the supply and demand sides of the tourism industry.
- “North Port Quay” has, in a Western Australian context, similarities to what could be termed the “Burswood” development zone and the synergies that it has with its tourism infrastructure and associated residential development resulting in a more viable investment environment.
- There is always the threat that in developing Fremantle’s tourism industry it can compromise the valuable heritage integrity of the City, “North Port Quay” can provide infrastructure for growth without impact on important heritage values.
- There is strong and growing demand for the tourism infrastructure, products and experiences that will be delivered by “North Port Quay” and it is in categories where metropolitan Perth is currently not competitive.
- For every 100 people employed in Western Australia around 6 are now as a result of the tourism industry. Tourist expenditure is increasingly important to a range of industry sectors, for instance it is responsible for 35% of the output of the accommodation, café and restaurant sector.
- 67% of the state’s tourism industry direct value added occurs in the Perth tourism region. 90% of international visitor expenditure is in the Perth region and with 62% of international visitors repeat visitors it is essential that Perth continue to invest and remain competitive.
- Western Australia’s tourists now have as priority activities; eating out, shopping for pleasure, going to the beach, going to markets. The state’s strengths are in beach and coastal activities and lifestyle experiences – a match for “North Port Quay”, however the “city life experience” sought by tourists is seen as weak in Perth and only projects of the scale of this can change this experience.
- The development will enhance and underpin a number of major government investments in tourism including the Perth Convention and Exhibition Centre, the WA Maritime Museum, Fremantle Prison, Fremantle’s West End and Fremantle Port developments.



- Current investment in tourism infrastructure in Perth, particularly hotel rooms and other short stay accommodation is lagging in comparison to demand. In 2007 only 183 new rooms/units were completed and only 357 are under construction. There is nothing under construction in Fremantle.
- “North Port Quay” presents an opportunity to develop permanent viable home ports for the Duyfken and Leeuwin ships.
- Annual visitation to “North Port Quay” could be in the vicinity of 8 million visits based on estimates that Hillarys Boat Harbour currently enjoys 3.5 million visits per annum. On completion in 10 years it is possible to consider 10 million visits per annum as achievable.
- Research commissioned by Tourism WA has identified the prospect of a long period of under supply of Perth CBD hotel rooms and the need for 270 –300 rooms per annum to come onto the market over the next 10 years if demand is to be met. It advises that these new rooms are unlikely to transpire due to a lack of appropriate sites, construction costs and yield on investment. Factors likely to be overcome only by access to development zones that provide for synergistic development of tourism infrastructure. “North Port Quay” although clearly not a Perth CBD development still offers a unique opportunity to bridge the identified gap in supply.
- Total direct expenditure by tourists staying in “North Port Quay” short stay accommodation on completion is estimated in current dollars to be \$5,917.5 million.
- The Performing Arts Centre is estimated to generate direct expenditure of approximately \$4.61 million in current dollars of which 20%, \$922,000 is ascribed to tourist expenditure.
- It is estimated that tourist expenditure at “North Port Quay” will result in employment for a total of 1850 people.



### 3. OVERVIEW OF WESTERN AUSTRALIAN TOURISM MARKET

Western Australia’s tourism industry remains strong and continues to contribute an increasing amount to the state in economic and social/community contexts. For every 100 people employed in Western Australia around 6 are now as a result of the tourism industry.

2005/06 – The Value of Tourism in Western Australia was<sup>2</sup>:

Contribution	Gross Value		Employment
	added (\$ billions)	Gross state product (\$ billions)	
Direct Tourism contribution	\$3.0	\$3.6	43,300
Indirect tourism contribution	\$1.9	\$2.1	19,700
Total tourism contribution	\$4.9	\$5.7	63,000

The distribution of value-added input from source markets is:

- International 31%
- Interstate 19%
- Intra-state 46%
- (Outbound) 4%

The nature of tourists’ spending/activities results in the following industry sectors having the greatest share of tourism output:

- Accommodation, cafes and restaurants 18%
- Transport and storage 29%
- Manufacturing 19%
- Retail trade inc. take-away food 11%
- Others 23%

<sup>2</sup> “The Economic Contribution of Tourism to Western Australia”. Access Economics Pty Ltd, 30 Aug 2007.



The extent of reliance on tourist expenditure by these industry sectors is evidenced by the Accommodation, Café and Restaurant sector earning 35% of its output from tourists, The Retail inc. take-away food sector earning 9% of its output from tourists, the Transport and Storage sector earning 21% of its output from tourists, the Cultural and recreation services sector earning 4% of its output from tourists and the Manufacturing sector earning 4% of its output from tourists .

***This expenditure pattern and the infrastructure and services proposed for “North Port Quay” are a match. The development will impact well on the state economy and tourism.***

Tourism in Western Australia continues to grow in terms of its economic contribution and the number of visitors and visits. In the year ending June 2007:

- West Australians took over 5.3 million trips within WA, which was a 0.3% increase on the year ending June 2006.
- Intrastate tourism spend in WA reached an all time high of \$2.2 billion.
- The number of interstate visitors to WA reached 1.28 million, a 12.3% increase on the year ending June 2006.
- Interstate nights (almost 11 million) and spend (\$1.3Billion) reached all time highs.
- International visitor numbers reached 644,300, up 3.7% on the year ending June 2006.

However, to maintain growth and improve market share it is clear that WA must do all it can to remain competitive in the product and experiences it offers tourists. The development of appropriate new infrastructure and experiences will be critical to continue this growth.



## 4. OVERVIEW OF PERTH REGION TOURISM MARKET

The “Perth” region dominates the state’s tourism industry.

- 67% of the state’s tourism industry direct value-added occurs in the Perth region .
- 90% of the international visitor spending in Western Australia is in the Perth region.

Total output at basic prices in the region for 2005-06 is estimated at \$4.514b. Expressed in terms of direct value-added, this is \$1.999b.

The impact is dominant in the following industry supplier groups:

- Accommodation, cafes and restaurants
- Retail trade inc. take-away food
- Transport and storage
- Manufacturing

This is obviously consistent with the 2006 ranking of principal leisure activities of visitors:

Market	Ranking	Activity
Domestic:	2	Eating out
	3	Shopping for pleasure
	4	General sight seeing
	5	Going to the beach
	8	Going to Markets
International	1	Eating out
	2	Going shopping for pleasure
	3	Going to the beach
	4	Going to the markets
	7	Going to Pubs/clubs/discos etc.

(Refer to; Experience Perth, Tourism Region Fact Sheet 2006)



This pattern of tourist activity and expenditure in Perth is however, not dissimilar to other major cities and to increase market share the Perth Region must continue to be competitive in its offer, not only in the context of other major Australian cities but also in the Asian region. To achieve this Perth must respond to visitor’s needs, including a desire to “see new things”, by creative planning and development. This need for new development is especially significant when it is realised that 62% of Western Australia’s international visitors are repeat visitors and that 90% of their expenditure occurs in the Perth region.

There is arguably a strong case for a new coastal development on the scale of “North Port Quay” if the state is going to facilitate investment in viable infrastructure and it is clear that beachfront/marine focused sites are market/consumer preferred.

***Government planning and environment policy limits opportunities in Perth for beachfront and development of tourism infrastructure and therefore “North Port Quay”, as a new development zone which increases beachfront community amenity, represents a unique and significant opportunity to deliver new, high-demand infrastructure for Perth and Western Australia.***

Tourism WA’s “Destination Development Strategy 2004-2014”, calls for development that will build on identified market strengths, including:

- beach and coastal activities
- lifestyle experiences
- Fremantle and Perth

It has also identified Perth as having weak “city life experiences” sought by tourists.

An analysis of available information<sup>3</sup> reveals few projects that will compete with the development of “North Port Quay” and would suggest that it will meet identified visitor needs/demands and complement other planned developments and new facilities. “North Port Quay” can also underpin the continued growth of Fremantle and the Perth region as a destination by leveraging existing attractions and facilities.

In particular the following specific attractions and facilities can benefit from “North Port Quay’s” development:

- the operation of the Duyfken and Leeuwin ships;
- the Fremantle Prison;
- the Maritime Museum;
- Fremantle’s West End revitalisation;
- the Victoria Quay and Fremantle Port;
- the Perth Convention and Exhibition Centre.

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<sup>3</sup> Experience Perth-Destination Development Strategy 2007-17



The same report<sup>4</sup> identifies industry and government support for:

- Beach front tourist accommodation.
- Water activity theme parks.
- Off-site function centres for the PCEC.
- More beachfront recreational amenity.

Currently the level of investment activity in tourism infrastructure in Perth City and Fremantle City cannot be described as strong. There are only 375 additional short-stay visitor accommodation rooms proposed for the Fremantle area, at Cantonment Street (193) and Bannister Rd. (182) and these projects have now been in the planning stage for more than four years. Only 183 new letable units were completed in Perth in 2007 and currently there are only an additional 357 rooms under construction. (Reference; Tourism WA- Perth Region Development Register)

Fremantle is an integral part of the Perth region and, after Perth City, the state’s most visited place ahead of the Swan Valley and the Margaret River/southern forest area.

However, in 2005 Fremantle’s tourist visitor numbers appear to have peaked when the estimated number of overnight and day-tripper visitors to Fremantle was<sup>5</sup>:

▪ International	477,500 (439,500 day-trippers plus 38,000 o/n visitors)
▪ Domestic	628,500 (548,000 day-trippers plus 80,000 o/n visitors)
<b>Total</b>	<b><u>1,106,000</u></b>

(Note; the international day tripper figure is calculated as 75% of Perth’s international visitors visiting Fremantle)

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<sup>4</sup> Experience Perth-Destination Development Strategy 2007-17

<sup>5</sup> TWA – utilising IVS and NVS figures



## 5. NORTH PORT QUAY’S TOURISM INFRASTRUCTURE, PRODUCT AND EXPERIENCES

The concept plan for North Port Quay, as presented, offers a number of significant opportunities to develop high quality tourism infrastructure, including:

- 500 four to five star hotel rooms with convention facilities;
- a 1500 seat performing arts centre;
- 1757 short stay tourist apartments providing 2635 rooms;
- tourist retailing;
- tourist restaurants and cafes;
- beach and surf recreation;
- a Duyfken and Leeuwin home port;
- extensive marine facilities, including a world class marina;
- recreational fishing facilities;
- offsite function space for the PCEC;
- entertainment facilities.

The proposed development offers the opportunity for both the government and private developers to accommodate integrated and complementary tourism facilities at what is possibly the only Fremantle/Perth development site offering unimpeded beach and marina access.

This is a major development offering the opportunity for a possible 3135 short-stay rooms to be created over the ten year development phase of the project.

The project is planned to accommodate a minimum of 10,000m<sup>2</sup> of **tourist focused** retail activity as a component of total retailing, estimated at 40,000-50,000m<sup>2</sup>. Combined with the new and exciting entertainment and recreational components that are proposed for the retail/mixed use zones this has the potential to generate a high level of visitation.

As an indication, tourist visitation plus non-tourist recreational/leisure visits could be expected to far exceed those of Hillarys Harbour, which is estimated to have approximately 3.5 million visits per annum.

Putting aside the exciting community/town infrastructure provided by the development, as a tourism precinct “North Port Quay” is proposed to have at least twice the retail floor space of Hillarys, considerably more boat moorings, recreational fishing and swimming area and short-stay accommodation rooms (3135 as against 45).



The potential significance of “North Port Quay’s” tourism infrastructure to Western Australia’s tourism growth is highlighted when its “offer” is seen in the context of agreement by industry and government on the need for the Perth metropolitan area to develop new first class tourist accommodation, services and experiences.

The July 2007 “Perth Hotel Investment Outlook” report forecasts significant unmet demand for beds over the next 10 years. And while “North Port Quay “ has a 10 year construction timeframe its infrastructure could be critical, as it addresses a number of that report’s identified obstacles to investment, particularly in accommodation. The primary factors identified as impediments to investment include suitable sites, construction costs, room yield and competing demand for investment funds. This “bottleneck” in supply has contributed to Perth CBD hotels/apartments having a 2007 first quarter annual average occupancy of 86.4%. The report predicts 3% per annum demand growth and identifies the need for 270 – 300 rooms per year to come on line over the next 10 years. In the Perth CBD, Tourism WA has identified just three potential sites as becoming available for hotel/accommodation in the next five years. Those sites may only deliver 1000 rooms in the ten-year timeframe. It concludes that “the market is facing a prolonged period of undersupply”.

“North Port Quay”, while not a CBD location, is a unique development zone that will create first class sites for hotel and short stay apartments to service metropolitan Perth. Very importantly these sites are within an integrated tourism zone/precinct which is attractive to investment.

“North Port Quay” also represents a significant opportunity to support the considerable state and private investment that has been made in the Perth Convention and Exhibition Centre by boosting the City’s five star attractions and facilities. The proposed 500 four to five star hotel rooms with convention facilities combined with the proposed 1500 seat performing Arts Centre will offer a significant off-site facility to support the marketing of the Perth Convention and Exhibition Centre.

“North Port Quay” has a unique capacity to increase beachfront amenity and coastal/marine leisure activities while taking development and environmental pressure off the Swan River and other prime beachfront. “North Port Quay” also offers a major opportunity to grow the value of tourism to Fremantle without impacting negatively on the port town’s heritage values. It may well take infrastructure development pressure off a valuable state heritage asset.

On a significantly smaller scale, the success of Hillarys Boat Harbour, the Mandurah Ocean Marina, Marston Hill/ Bunbury, the Exmouth Marina and Batavia Marina in Geraldton in accelerating tourism infrastructure in Western Australia, are strong indicators of “North Port Quay’s” potential to facilitate new tourism infrastructure investment.

International experience with major development projects on this scale offer even stronger evidence of positive impacts on tourism.



## 6. ESTIMATED MARKET DEMAND AND ECONOMIC IMPACT

### 6.1 Short-stay accommodation and other tourist expenditure

While the project is at an early conceptual stage, in the context of design specifics for short-stay accommodation, the provision of a prime site for 500 four to five star hotel rooms and the capacity to provide an additional 1757 short stay apartments in the development has significant potential for Perth’s tourism.

The location, the attractions and activities mix, and the transport facilities are an excellent match for market needs and both occupancy and revenues can expect to be at the high end of the Perth industry.

The development of 500 hotel rooms with an occupancy rate of 80% (Perth currently has an estimated 85% average annual occupancy rate) will generate 146,000 room nights per annum at an estimated average room rate of \$200 per night, resulting in direct expenditure of \$29.2m per annum in current dollars from hotel room revenue.

The development of 1757 short stay apartments with an average of 1.5 rooms each and an occupancy rate of 80% will generate 769,566 room nights per annum at an estimated average room rate of \$150 per night, resulting in direct expenditure of \$1,154.3m per annum in current dollars from apartment room revenue.

The projected total accommodation/room revenue from tourist activity is calculated as 80%, of the above figures, 20% being ascribed to other than tourist activity. The estimated annual revenue resulting from tourist expenditure on accommodation is therefore \$946.8m per annum in current dollars.

An estimate is also made of the overnight visitor expenditure that is additional to room revenue/expenditure. And while it is not possible to estimate how much of this is spent in the precinct due to the “leakage” into other localities, it is important to the total economic impact.

Utilising existing visitor research, additional expenditure in current dollars is calculated on the basis that accommodation expenditure is 23% of domestic visitor spend and 17% of international visitor spend. For this estimate it is assumed that the market share of room nights for domestic visitors and international is 50% each, therefore accommodation represents an average of 20% of total visitor spend. Total estimated annual spend on “North Port Quay” accommodation is \$1,183.5 m resulting in an estimated total spend by visitors staying in “North Port Quay” accommodation of \$5,917.5 million.

***In current dollars, overnight visitors to the proposed short-stay accommodation at North Port Quay would, generate approximately \$5,917.5 million in direct expenditure.***



Beachside accommodation within 15 minutes of the CBD and five minutes of Fremantle’s attractions will have strong business and leisure appeal in both domestic and international markets.

## 6.2 Performing Arts Centre

The “greater” Perth metropolitan region, including Fremantle, is considered to have insufficient live performance/theatre capacity.

This initial analysis examines the direct economic impact of a Performing Arts Centre in a precinct that includes the major five-star hotel, entertainment and retail facilities, a mix that will have strong demand from locals and all visitor markets.

The performing arts centre is planned as a minimum to include three theatre spaces, with the following capacities:

- 1,000 seats
- 250 seats
- 250 seats

*It should be noted that future detailed planning and feasibility studies could determine the viability of a Centre with twice this capacity.*

### Performing Arts Centre

Theatres	Capacity	Annual ticket sales	Average ticket price	Average other sales	Total spend \$
Main	1,000	67,600 <sup>(1)</sup>	\$50	\$10	\$4,056,000
Lesser 1	250	11,250 <sup>(2)</sup>	\$20	\$5	\$ 281,250
Lesser 2	250	11,250 <sup>(2)</sup>	\$15	\$5	\$ 225,000
					\$4,562,250
Conference Hire	24 days	\$2000/day			\$ 48,000
<b>Total</b>					<b>\$4,610,250</b>

#### Notes

1. The main theatre is forecast to stage an average of two performances per week at 65% average capacity
2. The lesser theatres are forecast to stage 20 performance of three days each per year at 75% average capacity.



*The Performing Arts Centre is forecast to generate direct expenditure of approximately \$4.61m per annum in current dollars of which 20%, \$922,000 is ascribed to tourist expenditure.*

### 6.3 Visitation

Forecasting total visitation is complex however, an indication of the potential number of visits is made on the basis of visits to existing facilities in Perth and their size relative to “North Port Quay”. The mix of visits and visitors will be varied and include:

- day trippers – intrastate, interstate and international participating in shopping, eating out, sight seeing, swimming, fishing, entertainment, boating;
- over night tourists;
- visitors to residents;
- shoppers to the retail complex;
- employees of precinct businesses;

An indication of the appeal of North Port Quay and the potential level of visitation can also be seen in the current (2006) leisure activities of Perth region tourists;

Activity	International	% of total	Domestic	% of total
Eat out	559,900	93%	1,563,000	57%
Go shopping	514,700	86%	911,000	37%
Go to the Beach	414,400	67 %	563,000	21%
Visit Fremantle	439,500	72%	548,000	21%

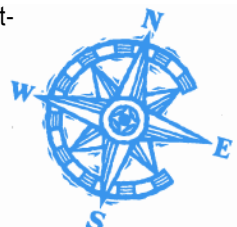
The activities above are clearly matched to the experiences that “North Port Quay” can deliver at a new level of excellence.

Consideration should also be given to the significance of recreational boating and its impact on visitation levels. In 2004/05 – 1.52m boat launches and beach accesses were made into the Marmion Marine Park which constitutes the majority of metropolitan waters north of Fremantle. It could be that “North Port Quay” will become the major boat launching facility in metropolitan Perth generating strong visitation to the precinct.

*North Port Quay fits this existing and growing pattern of tourist activity.*

At a very basic level it is possible to suggest that “North Port Quay”, with the correct mix of retail, entertainment and recreational facilities, can on the basis of Hillarys’ performance (estimated at 3.5m visits per annum) have a total annual visit level of 8m plus at current demand levels.

Underpinning this suggested level of visitation for “North Port Quay” is the fact that it could have more than twice the retail floor space of Hillarys, greater recreational and entertainment amenity, 3135 short-



stay rooms compared to 45 at Hillarys, residents, a significant recreational fishing capacity and at least 3 times the number of boat pens and moorings.

On its anticipated completion in ten years time, this level of annual visitation could conceivably be 10m visits.

#### **6.4 Employment Estimates from Tourism Impacts**

On completion the planned “North Port Quay” development could create the following employment opportunities as a result of tourist expenditure.

Employment generated by overnight accommodation at “North Port Quay’s” proposed 3135 rooms is estimated by applying the ratio of employees to room nights that applied to Perth City properties with more than 15 rooms in 2006, that ratio is .00178 employees per room night. This ratio applied to the estimate of 915,556 annual room nights would result in “North Port Quay’s” short stay accommodation generating jobs for 1633 employees. 80% of the occupancy is estimated to be tourists resulting in an estimated 1306 employees in work from tourist activity.

Tourist spending activity and its impact on sales and employment in the retail, restaurant, café and entertainment industries can be estimated in a number of ways. For this report one estimate of employment resulting from tourist expenditure at “North Port Quay’s” retail/entertainment space is reached by comparison to Hillarys Boat Harbour/Sorrento Quay which is considered to be a very similar concept.

It is estimated that across the retail/entertainment mix at Hillarys there is one employee per 22m<sup>2</sup> of retail space. (Hillarys is estimated to have approximately 450 employees and 10,000m<sup>2</sup> of retail floor space).

On this basis, “North Port Quay” could create jobs for 1,800 employees from its retail/entertainment activity (based on 40,000m<sup>2</sup>).

While the ultimate mix of retail activity is not yet determined, it is estimated that retail sales to tourists at “North Port Quay” will generate 30% of the sales and employment, this is considerably higher than the 9% of retail activity attributed to tourist expenditure across all retail <sup>6</sup>, however “North Port Quay” will be strongly focussed on tourist retail. This results in an estimate of 540 employees retail jobs emanating from tourist expenditure.

The Performing Arts complex is expected to have 20 employees and to generate 20% of its revenue from tourist activity resulting in an estimated 4 jobs emanating from tourist expenditure.

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<sup>6</sup> Access Economics-The Economic Contribution of Tourism to Western Australia 2005-06, 30August 2007



*This analysis suggests that direct tourist expenditure will create work for a total of 1850 employees.*

**Additional source materials**

ABS 2006 Accommodation Perth City

Tourism WA - Experience Perth Perspective 2005

Draft National Business Events Study – Nov 2004 - PCB provided.

