



FACTSheet

#13, September 2018

-  Indicates no change from FACTSheet #12 March 2018
-  Indicates an increase from FACTSheet #12 March 2018
-  Indicates a decrease from FACTSheet #12 March 2018
- Indicates newly released or incomparable data

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Introduction

This latest FACTSheet produced by the Committee for Perth contains a snapshot of key facts relating to the current performance of Perth and Western Australia. It draws on data from a range of sources including FACTBase reports, Committee for Perth research, government departments and media sources.

The economy¹

Real Gross State Product (% change)

-  Western Australia's gross state product (GSP) of \$247.7 billion in 2016-17 was 14% of Australia's gross domestic product (GDP).
-  GSP per capita of \$96,466 in 2016-17 was 34% above Australia's GDP per capita of \$71,971.
-  Real GSP fell 2.7% in 2016-17, compared with annual average growth of 3.9% over the past ten years.
-  The 2017-18 Government Mid-Year Financial Projections Statement forecasts **real GSP growth of 2.5%** in 2017-18 and 3% in 2018-19.
-  **Australia's real GDP rose 2.0% in 2016-17.** The Australian Government forecasts GDP growth of 2.5% in 2017-18 and 3% in 2018-19.

Industry Sectors (nominal gross value added)²

-  **Goods producing industries** accounted for 47% or \$115.8b of GSP in 2016-17, followed by services industries, 43% or \$105.5b and dwelling ownership and other items at 11% or \$26.4b.

-  **Mining accounted for 29% of GSP in 2016-17,** followed by business and property services at 10% and construction 8%.
-  **Manufacturing accounted for 5% of GSP in 2016-17.**
-  **Agriculture, forestry and fishing** accounted for 3% of GSP in 2016-17.

Industry sectors contribution to real GSP growth: 2016-17²

An industry's contribution to real GSP growth depends on real changes to its gross value added and its share of GSP.

-  **Agriculture, forestry and fishing** gross value added rose 24% in 2016-17, contributing 0.5 percentage points to real GSP growth.
-  **Mining gross value added** rose 2% in 2016-17, and with its large share of GSP, contributed 0.5 percentage points to real GSP growth.
-  **Construction gross value added** fell 26% in 2016-17, taking 2.8% from real GSP growth.

Gross state income and terms of trade (% change)²

Changes in export prices relative to import prices, terms of trade, affects gross state income (GSI) and accounts for the difference between changes in GSI and GSP.

-  **Western Australia's terms of trade** rose 13% in 2016-17. This meant that despite a decline in real GSP, Western Australia's GSI rose 3.6% in 2016-17, below annual average growth of 4.3% over the past ten years.
-  The Reserve Bank of Australia's **\$A commodity price index for Australia** rose 22% in 2016-17.

Commodity prices and exchange rate (monthly)³

- ^ The RBA's monthly \$A commodity price index rose 4% in February 2018. It rose 20% in 2017.
- ^ The monthly average price of iron ore rose 1% to US\$77 a tonne in February 2018.
- ^ The annual average price of iron ore rose 23% to US\$72 a tonne in 2017 and is forecast to fall to US\$66 a tonne in 2017-18 and US\$62 a tonne in 2018-19.
- ✓ The monthly average \$A exchange rate fell 3% to US78 cents in February 2018. The annual average \$A exchange rate rose 3% to US77 cents in 2017 and is forecast to be US77 cents in 2017-18 and US76 cents in 2018-19.

Population growth⁴

- > Western Australia's population of 2.58 million in 2016-17 was 10% of Australia's population.
- > Population growth of 0.8% or 21,403, in 2016-17 was below annual average growth of 2.1% over the past ten years.
- > Natural increase of 20,024, and net overseas migration, up 13,101, offset falling net interstate migration which was down 11,722 in 2016-17.
- > Annual average population growth is forecast to rise to 1.0% in 2017-18 and 1.2% in 2018-19.
- > The 2015 WA Tomorrow report forecasts a population of 3.27 million by 2026.

Labour market

Employment monthly⁵

- ^ Western Australia's total employment fell by 1,270 to 1.33 million in February 2018, with a fall in part-time employment, down 9,578 to 433,765, offsetting a rise in full-time employment, up 8,308 to 900,311.
- ^ Total employment rose 2%

or 28,279, through the year to February 2018, with a rise in full-time employment, up 1% or 7,754, and part-time employment up 5% or 20,525. The 2017-18 Government Mid-Year Financial Projections Statement forecasts annual average employment growth of 2% in 2017-18 and 1.5% in 2018-19.

Industry sector employment (quarterly)⁶

- ^ Services industries accounted for 72% or 957,450 of total employment in the March quarter 2018 and goods-producing industries accounted for 28% or 381,151.
- ✓ The largest increases in employment through the year to the March quarter 2018 were in healthcare and social assistance, up 23,423, and education and training, up 14,330.
- The largest falls in employment through the year to the March quarter 2018 were in retail and wholesale trade, down 20,545 and business and property services, down 8,058.

Participation rate and job vacancies (quarterly)⁷

The participation rate measures the proportion of the civilian working age population, aged 15 and older, in the labour force, people who are either employed or unemployed.

- ✓ The participation rate of 68.0% in the March quarter 2018 was below the 68.8% in the previous quarter, but above the 67.1% a year ago.
- > The 2017-18 Government Mid-Year Financial Projections Statement forecasts an annual average participation rate of 67.9% in 2017-18 and 68.2% in 2018-19.
- ^ There were 22,200 job vacancies in the March quarter 2018, 2,400 more than in the previous quarter and 4,400 more than a year ago.

Unemployment rate (monthly)⁵

The unemployment rate measures the proportion of the labour force that is unemployed and people without a job who are actively looking for work.

- ^ Western Australia's unemployment rate of 6.0% in February 2018 was above the 5.8% in the previous month, but the same as the 6.0% a year ago.
- Australia's unemployment rate was 5.6% in February 2018.
- > The 2017-18 Government Mid-Year Financial Projections Statement forecasts an annual average unemployment rate of 5.75% in 2017-18 and 2018-19.
- Unemployment rose by 3,361 to 85,183 in February 2018.

Underutilisation rate (quarterly)⁵

The underutilisation rate measures the proportion of the labour force that is unemployed or underemployed, that is workers wanting more hours.

- ✓ The underutilisation rate of 14.6% in the March quarter 2018 was below the 15.3% in the previous quarter and 16.4% a year ago.
- ✓ The underutilisation rate in the March quarter 2018 comprised an underemployment rate of 8.8% and an unemployment rate of 5.8%.
- ✓ The underemployment rate of 8.8% in the March quarter 2018 was below the 9.1% in the previous quarter and 10.6% a year ago.

Average annual earnings and wages growth⁸

- ^ Average annual adult full-time total earnings rose 1.5% to \$94,890 in 2017.
- ^ Western Australia's average annual adult full-time total earnings were 12% or \$10,020 above the Australian average of \$84,869 in 2017.

- ^ Wages growth of 1.5% in 2017 was below annual average growth of 3.1% over the past 10 years, and below Australia's wages growth of 2.1% in 2017.
- > The 2017-18 Government Mid-Year Financial Projections Statement forecasts wages growth of 1.5% in 2017-18 and 1.75% in 2018-19.

Consumption

Real household consumption (% change)⁹

- > Western Australia accounted for 10% of Australia's household consumption in 2017.
- > Household consumption accounted for 42% of GSP in 2016-17 and contributed 0.2% to real GSP growth.
- ^ Real household consumption growth of 1.3% in 2017 was below annual average growth of 2.9% over the past ten years.
- > The 2017-18 Government Mid-Year Financial Projections Statement forecasts real household consumption to rise 0.75% in 2017-18 and 1.75% in 2018-19.

Household consumption by industry sector (nominal)⁹

- ^ Nominal household consumption rose 1.0% to \$107.0 billion in 2017.
- ^ The largest increases in household consumption in 2017 were in insurance, finance and other, up \$715m or 5%, health was up \$545m or 7%, and transport up by \$270m or 2%.
 - The largest decreases in household consumption in 2017 were in rent and other dwelling services, down \$607m or 3%, furnishings and household equipment were down \$265m or 5%, and clothing and footwear were down \$139m or 4%.

Gross household disposable income per capita²

- > Western Australia's gross household disposable income per capita of \$51,412 in 2016-17 was 8% or \$3,933 above Australia's gross household disposable income per capita of \$47,479.
- > Gross household disposable income per capita fell 3% in 2016-17, compared with annual average growth of 4% over the past 10 years.
- > Total gross household disposable income fell by \$2.9 billion in 2016-17, due to changes in employee wages, down \$3.5 billion, social benefits and other secondary income, down \$139 million, self-employed and property income, up \$411 million, and interest and tax paid on secondary income, down \$340 million.

Investment

Investment (nominal)⁹

- ^ Western Australia accounted for 18% of Australia's business investment in 2017.
- > Business investment accounted for 15% of GSP in 2016-17 but detracted 6.4% from real GSP growth.
- ^ Real business investment fell 10% in 2017 and is forecast to fall 12% in 2017-18 and 8.5% in 2018-19.
- ^ Nominal business investment fell 10% to \$38.5 billion in 2017.
- ^ Nominal dwelling investment fell 19% to \$8.5 billion in 2017.
- ^ Nominal public investment rose 8% to \$9.3 billion in 2017.

Private new capital expenditure¹⁰

- ^ Western Australia accounted for 55% of Australia's mining new capital expenditure in 2017.
- ^ Mining accounted for 73% of Western Australia's private new capital expenditure in 2017.
- ^ Mining new capital

expenditure fell 24% to \$20.5 billion in 2017.

- ^ New capital expenditure in other selected industries rose 8% to \$7.4 billion in 2017.
- ^ In March 2018, Western Australia had \$53 billion of major resource projects under construction or committed and \$50 billion under consideration.

Exploration expenditure¹¹

- ^ Western Australia accounted for 63% of Australia's minerals exploration expenditure in 2017.
- ^ Western Australia accounted for 41% of Australia's petroleum exploration expenditure in 2017.
- ^ Minerals exploration expenditure rose 20% to \$1.1 billion in 2017, mainly due to increases in gold and nickel/cobalt exploration.
- ^ Petroleum exploration expenditure fell 51% to \$492 million in 2017.

Property market and construction industry¹²

- ^ Perth's median established house price rose 1% to \$508,000 in the December quarter 2017. It fell 3% through the year to the December quarter 2017.
- ^ Regional Western Australia's median established house price rose 6% to \$340,000 in the December quarter 2017. It fell 3% through the year to the December quarter 2017.
- ^ Perth rents fell 1% in the December quarter 2017 and 7% through the year to the December quarter.

Building and engineering construction¹³

- > Residential building activity fell 26% to \$6.6 billion in 2016-17.
- > Non-residential building activity fell 5% to \$4.5 billion in 2016-17.
- > Heavy industry engineering construction activity fell 35% to \$17.5 billion in 2016-17.

- Other engineering construction activity fell 24% to \$7.0 billion in 2016-17.

Building construction activity outlook (quarterly)¹⁴

- ↗ Western Australia had \$6.6 billion worth of building activity in the pipeline in the September quarter 2017, below the \$6.8 billion in the previous quarter.
- ↗ Residential building approvals rose 3% to \$1.5 billion in the December quarter 2017. Residential building approvals typically lead building activity by one to two quarters.
- ↗ Non-residential building approvals rose 14% to \$1.3 billion in the December quarter 2017.
- ↘ Housing finance for the construction of new dwellings fell 9% to \$882 million in the December quarter 2017. Housing finance typically leads residential building activity by two to three quarters.

Merchandise exports

Merchandise exports¹⁵

- ↘ Western Australia accounted for 41% of Australia's merchandise exports in 2017.
- Merchandise exports accounted for 50% of GSP in 2016-17 and contributed 3.2% to real GSP growth.
- ↘ Real merchandise exports growth of 3% in 2017 was below annual average growth of 6% over the past 10 years.
- The 2017-18 Government Mid-Year Financial Projections Statement forecasts real merchandise exports growth of 7.5% in 2017-18 and 5% in 2018-19.
- ↘ Nominal merchandise exports rose 16% to \$123.2 billion in 2017.

Major export markets (top 10)¹⁶

- ↘ Western Australia's largest export market in 2017 was China at \$60.1 billion or 49%, followed by Japan, \$16.5 billion or 13% and Hong Kong, \$8.6 billion or 7%.
- ↘ Western Australia had majority shares of Australia's exports to Hong Kong with 72%, China 60%, United Kingdom 59% and Singapore 54%, in 2017.
- ↗ Minerals and petroleum accounted for 92% or \$113.3 billion of merchandise exports in 2017.
- Agriculture, food, fibre, fisheries and forestry exports accounted for 7% or \$8.5 billion of merchandise exports in 2016-17.

Service exports¹⁷

- Western Australia accounted for 8% of Australia's services exports in 2016-17, down from 9% in 2016.
- Services exports accounted for 3% of GSP in 2016-17 and detracted 0.1% from real GSP growth.
- ↘ Real services exports fell 4% in 2017 compared with annual average growth of 1% over the past 10 years.
- Nominal services exports fell 1% to \$6.8 billion in 2016-17.

Services exports by industry sector (top 5)¹⁷

- Services exports in 2016-17 mainly comprised personal travel at 34% and education-related travel 28%.
- The largest increase in services exports in 2016-17 was in education-related travel which was up 12%, while the largest decline was in personal travel, down 6%.
- ↘ International student enrollments fell 2% to 53,897 in 2017, compared with annual average growth of 4% over the past 10 years.
- ↘ Western Australia accounted for 6.7% of Australia's international student

enrollments in 2017, below the 7.7% share in 2016.

Overnight visitors¹⁸

- Tourism accounted for 2% or \$5.5 billion of GSP and 5%, 72,000 of total employment in 2015-16.
- ↗ Overnight visitors fell 1% to 10.6 million in 2017, compared with annual average growth of 4% over the past 10 years.
- ↗ The fall in overnight visitors in 2017 was due to a fall in domestic visitors, down 1% to 9.6 million and international visitors, down 1% to 946,100.
- ↘ Visitor spending fell 5% to \$9.6 billion in 2017 due to decreases in spending by domestic visitors, down 7% to \$5.3 billion and international visitors, down 6% to \$2.2 billion.
- ↘ Day trip visitor spending rose 1% to \$2.0 billion in 2017.

Mining²

Mining gross value added (nominal)

Western Australia is the main minerals and petroleum exporting region of Australia and produces a significant proportion of the world's minerals and petroleum commodities.

- Western Australia accounted for 56% of Australia's mining gross value added in 2016-17, below its 59% share in the previous year and 67% share in 2013-14.
- Mining accounted for 29% of GSP in 2016-17, above its 24% share in the previous year, but below its 37% share in 2010-11.
- Nominal mining gross value added rose 26% to \$72.3 billion in 2016-17, above annual average growth of 7% over the past 10 years.

Major minerals and petroleum sales¹⁹

- ↘ Iron ore accounted for 58% of minerals and petroleum sales in 2017, followed by:

- > LNG 14%
- > Gold 10%
- > Alumina and bauxite 5%
- > Crude oil and condensate 4%
- > Nickel 2%
 - Natural gas 2%
- > Base metals 1%
 - Tin, tantalum and lithium 1%
- > Mineral sands 0.5%
- > Minerals and petroleum sales rose 16% to \$108.8 billion in 2017, mainly due to increased sales of iron ore, LNG and alumina/bauxite.

Iron ore sales¹⁹

- > Western Australia accounted for 53% of world seaborne iron ore exports in 2016.
- > Iron ore sales rose 14% to \$62.9 billion in 2017, due to rising sales volumes and average prices.
- > The volume of iron ore sales rose 3% to 795 million tonnes in 2017, below annual average growth of 12% over the past 10 years.
- > The annual average \$A unit price, free on board, of iron ore sales rose 10% in 2017.
- > The 2017-18 Government Mid-Year Financial Projections Statement forecasts iron ore sales to rise to 835 million tonnes by 2020-21.

LNG sales¹⁹

- > Western Australia accounted for 12% of world LNG exports in 2017.
- > LNG sales rose 40% to \$14.9 billion in 2017, due to rising sales volumes and average prices.
- > The volume of LNG sales rose 38% to 33 million tonnes in 2017, above annual average growth of 10% over the past 10 years.
- > The annual average \$A unit price, free on board, of LNG sales rose 2% in 2017.
- > Western Australia's LNG production capacity will grow to 50 million tonnes a year by the end of 2018.

Gold sales¹⁹

- > Western Australia's gold sales rose 4% to \$11.1 billion in 2017,

due to rising sales volumes offsetting falling average prices.

- > The volume of gold sales rose 7% to 210 tonnes in 2017, above annual average growth of 3% over the past 10 years.
- > The annual average \$A unit price (free on board) of gold sales fell 2% in 2017.

Construction industry³²

- > The construction industry employs 10.2% of the state's workforce, with 4.6% growth in May 2018 compared to May 2017. The industry employs more than 67,800 tradespeople, which is 4.3% more workers than it did 12 months ago.
- > The construction industry employs 44% of the State's apprentices. Including electrical, there are currently 6,764 apprentices 'in training' which is a 2.9% decrease on the previous year but there has been a 68.4% reduction in apprenticeship cancellations. There has been a 4.8% decrease in construction apprenticeship commencements with an increase in electrical apprentice commencements of 16.6%.
- > The industry employs 804 trainees. Since 2009 there has been a 71% increase in traineeships especially in the Civil Construction sector.

Building approvals and commencements³²

- > There was a total of 18,534 approvals for all types of dwelling units. This was a reduction of 7.7% on the previous year to May 2018. However, over the period April to May 2018, approvals have decreased by 0.6%. Houses made up 13,747 of the overall approvals. This was a reduction of 8.1% in the year to May 2018 and a reduction of 8.0% in the last quarter with a 9% decrease over the period April to May 2018.
- > In the year to December 2017 there was a total of 19,634 dwelling commencements.

- > There was decrease of 2.7% in the value of the residential construction work done in the last quarter to \$6.16 billion. This shows an improvement in activity in the last quarter compared against a reduction of 15.5% on the previous twelve months.
- > Non-residential construction experienced a decrease of 20.1% in the last quarter to \$4.81 billion. This was against an increase of 7.6% in the previous twelve months. This is an improvement on the year to March 2017 when there was an 8.6% decrease in work done.

Economic news

- Despite maintaining its position as the worst performing state in the country, **Western Australia's economy showed improving levels of investment**, according to the latest CommSec State of the States report. The July quarterly analysis ranked WA's economy eighth, citing a weak jobs market and the lowest economic growth in the nation, but said its equipment spending had reached a three-year high. Equipment spending measures investment in new plant and equipment, with the results compared to each state's 10-year average. Although WA's equipment investment was down 12.6% on the decade average, it was the highest level since 2015. CommSec also said the state's population growth of 0.83 per cent was the fastest rate in two years.²⁰
- **Western Australia's resources industry reached several milestones in 2017** according to statistics released by the Department of Mines, Industry Regulation and Safety. Higher iron ore prices, strong growth in LNG volumes and the gold sector's continued strength contributed to reported sales of \$108.8 billion, a 16% increase from 2016. Iron ore sales were up 14% to nearly \$63 billion; gold sales exceeded \$11 billion for the first time, more than twice what it was 10 years ago; and LNG volumes increased by 38% to a record 32.7 million

tonnes. Sales of spodumene, the primary lithium-bearing mineral produced in the State, increased by 166% to reach \$780 million in 2017. The average number of people directly employed in WA's minerals sector also increased by six per cent to more than 111,000.²⁴

- A FACTBase report by the Committee for Perth has found that **more people of retirement age are still working full-time and part-time, compared with more than a decade ago**. There was an increase of 137% amongst people aged 65 years and over living in Greater Perth, who worked full-time in 2016 compared with 2006. On top of that, there was a 150% increase in the number of people aged 65 or over, working part-time.³⁰
- **Kwinana has been selected as the site for what is likely to be the fourth lithium refinery in Western Australia**, with investment in the boom sector estimated to exceed \$4 billion over the next few years. A joint venture between Kidman Resources and Chilean miner Sociedad Quimica y Minera de Chile (SQM) signed an option agreement with State Government agency LandCorp over a vacant lot in Kwinana. The refinery will have an annual capacity of about 44,000 tonnes of lithium hydroxide or 37,000t of lithium carbonate, with Kidman forecasting commissioning in 2021. The project is expected to create about 400 jobs during the construction phase and 150 operational jobs. The Kidman-SQM joint venture, known as Western Australia Lithium, has not disclosed the cost of the refinery, but is likely to invest about \$600 million, judging by the cost of similar projects. Chinese company Tianqi Lithium is in the midst of building WA's first lithium refinery on a nearby site at Kwinana.²⁰
- In April, the Commonwealth Grants Commission released its recommended GST relativities for 2018-19. **Western Australia is set to receive just 47.3% of its population share of GST revenues**. As a result, in

2018-19 alone, WA will be short-changed to the tune of \$3.6 billion. WA's total shortfall now mounts to more than \$30 billion since the GST was introduced. At the same time as Western Australia is being short-changed by billions of dollars, most other States and Territories will continue to receive more than their population share. For example, the Northern Territory will receive 426% of its population share, Tasmania 177% and South Australia 148%.²⁴

- **More West Australians are falling behind on their home loans, according to alarming new numbers from the Commonwealth bank in August**. The lender said the number of WA customers more than 90 days late on their repayments blew out 20 basis points, or 15 per cent, in the June half-year to 1.5% of borrowers. The State figure compared with the Commonwealth's increased national arrears rate of 0.7%, which includes loans by its WA subsidiary, Bankwest. The bank said the blow-out in late payments reflected "pockets of stress" as "some households experienced difficulties with rising essential costs and limited income growth". WA and the Northern Territory were singled out, with WA's weakness focused on "outer-metro and regional areas" rather than mining towns, prominent areas of concern since the end of the mining boom.²¹
- **The 6030 postcode, which includes Clarkson, Merriwa and Tamala Park has the highest level of mortgage stress in WA**. Of the around 11,000 households, there are 4,597 households in mortgage stress in the area. Eighty-six per cent of the properties are separate houses, and 14% town houses. Fifty-one per cent of the properties are mortgaged, well above the WA average of 40%. The average monthly mortgage repayment is \$2,000. The average proportion of income spent on the mortgage is more than 28%, but more than 12% have repayments requiring more than 30% of income.²⁷

- **REIWA released the list of Perth's top 10 most-affordable suburbs in May**. From 10-1, they are: Leda, with a median house price of \$316,000. Orelia, \$315,000. Maddington, \$314,000, this represents a 12.8% decline in price compared to the year to March 2017. Lockridge, \$310,000. Cooloongup, \$300,000. Hillman, \$280,000. Parmelia, \$269,000, this median represents a 7.2% decline on the same time last year. Camillo, \$266,00 a decline of 9.8% to its annual median house price in the year to March 2018. Armadale, \$250,000, a 12.9% decline in prices over the year. And topping the most affordable list was Medina at \$238,000. The median price in Medina fell 4.8%.²⁸
- **Perth's rental market recorded 12 consecutive months of stable prices according to REIWA**. The overall median rent price remained unchanged at \$350 per week for the March quarter 2018, however when the house and unit markets were looked at individually they both recorded a \$5 per week increase to their median rent.
- One-in-four of Western Australia's poorest households do not have access to the internet according to a new report highlighting a digital divide that is alive and well between the state's rich and poor. Bankwest Curtin Economic Centre's Falling Through the Net: The Digital Divide in WA found 26% of the state's lowest income earners did not have access to the internet in 2016-17, compared to 99% of high income earners who did. It's greatly improved on the 40% of low income earners who didn't have internet access in 2012-13, but report authors said the gap was still too big. Digital stress is defined as the poorest 40% of households spending more than 10% of their budget on digital services like internet connections and devices.²⁵
- While it only employs 15,378 people or 1.81% of Perth's total population, **a FACTBase report has found that the arts and**

recreation services industry has grown by more than 26% over the past seven years, making it an important part of Greater Perth's economy. Not surprisingly, the mining industry is still a key contributor to our economic base, employing 3.14% of the working population.³⁰

- In March, **Tourism Western Australia launched a plan to grow the number of visitors to the State over the next two years.** The plan focuses on four key areas that will help drive visitation, including positioning the State as Australia's western gateway; changing perceptions of Perth and reigniting the east coast market; attracting more people, more often to regional WA; and intensifying promotional activity in target markets to encourage travel. Stakeholder consultation played an important part in developing the plan, which takes into account changing market conditions; the remarkable transformation of Perth; and the State Government's commitment to provide \$425 million to Tourism WA over the next five years for destination marketing and events. Highlights of the plan include: attracting more overseas direct flights to Perth; undertaking aggressive brand and co-operative marketing; maximising leisure visitation from events at Optus Stadium; securing and hosting major travel trade events; growing the number of cruises homeporting in WA; and launching a new home-grown Perth event in 2019.²⁰
- New research shows **Western Australia's Aboriginal tourism businesses made a significant contribution to WA's economy in 2016-17, adding \$43.8 million to Gross State Product.** Of this, \$20.1 million was a direct contribution with \$23.7 million indirect. The Aboriginal tourism sector also generates nearly 340 full-time equivalent jobs in one year and contributes nearly \$30 million to WA incomes. In addition to the significant impact on the WA economy, the research also focused on the multiple social

benefits that Aboriginal tourism presents, such as employment opportunities, strengthening pride and bringing different cultures together.²⁴

- Attracting a more diverse range of tourists, increasing the number of people visiting regional Western Australia, developing a short-stay visitor market and creating more sophisticated marketing campaigns are just some of the challenges facing the local tourism sector so that it can continue to grow, according to a FACTBase Bulletin released by the Committee for Perth, as part of its *Bigger & Better Beyond the Boom* research project. The report found that **in some sectors tourism is underperforming but it has the capacity to create new jobs and drive economic expansion in coming decades.**³⁰
- **Pop superstar Pink's four sold out Perth Arena shows attracted 6,000 overseas and interstate visitors to Western Australia, injecting nearly \$9 million into the WA economy, boosting the hospitality industry and supporting local jobs.** One-in-four concertgoers travelled from outside Perth to attend, with a further 10,600 people visiting from regional WA. Some hotels recorded as much as a 300% uplift in revenue, with the total number of hotel night bookings expected to have exceeded 11,000. The Australian Hotels Association has lauded the concert's success in boosting the local hospitality industry. Benefits from Perth Arena concerts travel far beyond the metropolitan areas, with half of visiting concertgoers reporting they planned to travel into regional WA as part of their visit.²⁴
- While Sydney and Melbourne might be Australia's biggest cities, they aren't necessarily our most connected or globalised. **A major finding by a FACTBase Bulletin found that it matters less if a city is global, it's now more important how it is global.** The report also dispelled the perception that Perth has a 'branch office' economy, where we have local offices but not many

company headquarters based here.³⁰

- Australia's most generous corporate donors have been named in the inaugural GivingLarge report, with Wesfarmers and CSL receiving top billing. The report by Melbourne-based research group Strive Philanthropy provides analysis of community investments made by Australia's largest ASX-listed companies. The report revealed **Perth-based conglomerate Wesfarmers and global biotechnology company CSL were leading the way, with contributions comprising cash donations, volunteering time and gifts in kind.** Over the past three years, Wesfarmers donated 2.14% of its pre-tax profit while CSL donated 1.97% respectively. Wesfarmers primarily contributed in the areas of medical research, Indigenous programs, education initiatives and arts programs. CSL donated \$52 million, with the money going to biomedical research, medical education and support groups, and emergency relief. Perth-based mining and metals company South32 also featured in the top 10 donors relative to underlying earnings, ranking number five, while Woodside Petroleum ranked number eight.²⁰
- **The State Government tender has called for proponents to build 246 new METRONET railcars for Perth over the next decade.** The pre-qualification tender for the \$1.6 billion project will include a local content target of 50% for the manufacturing of new railcars. Delivery of the first 17 new trains, known as the C-series, is due to begin in 2021. The additional 24 trains are expected to be delivered between 2023 and 2028.²³
- The growing spectre of online shopping has not deterred one of the country's largest retailers from investing in its bricks-and-mortar assets, with **David Jones opening its fifth Western Australian store as part of the final chapter of Mandurah Forum's \$350 million redevelopment in March.** The

Mandurah Forum overhaul has been in the works since 2016, with joint owners Vicinity Centres and ISPT significantly expanding its retail floor space. The centre's tenant base has grown by almost 100% to 200, anchored by international fast-fashion retailer H&M and now, David Jones.²⁰

- Health care and social assistance, accommodation and food services, construction and retail trade have been the key industries driving local economic competitiveness across Greater Perth. A FACTBase report has found that **while Greater Perth is the second most competitive economy in Australia, it's not enough, with the region scoring the lowest in the country for a key driver of growth and innovation.**³⁰

Reforming and Reshaping

- **Legislation to reform Western Australia's on-demand transport industry and foster more competition and innovation was introduced to State Parliament in August.** The Transport (Road Passenger Services) Amendment Bill 2018 represents the biggest reform to the industry in WA history. In the lead-up to the election, the State Government made an election commitment to reform the industry and implement an industry-funded taxi plate buyback scheme. Once passed, the legislation will end restrictions that have made it difficult for taxis to compete and give the industry greater certainty. It provides for the voluntary buyback of owned taxi plates, which will be industry funded over four years through a temporary levy on the total fare revenue of booking services. This approach will allow for the temporary levy to be incorporated into the business models of authorised booking services.²⁴
- **The State Government's 'no body, no parole' legislation passed through both houses of Parliament in March.** Under the new laws, people convicted of murder, manslaughter or infanticide will not be released on parole unless they can satisfy the Prisoners Review Board that they have satisfactorily co-operated with police or other law enforcement authorities in the identification of the location, or last known location, of the body or remains of their victim.²⁴
- **Drivers who kill will face tougher penalties under reforms being introduced into State Parliament, to be known as Charlotte's Law. The new law will expand the criteria in which police can charge someone with aggravated dangerous driving causing death.** The changes, prompted by the tragic death of Charlotte Pemberton and others, are designed to bring penalties in line with community expectations. Ms Pemberton was killed by a man driving a high-powered motorcycle, without a valid licence and travelling at 40 kilometres over the speed limit. The new law lowers the speed threshold to 30 kilometres an hour and allows police to apply aggravating circumstances for driving whilst unlicensed, suspended or disqualified.²³
- **Western Australia's new liquor licencing laws came into effect in August,** ushering in significant changes to the State's hospitality landscape. The State Government says the Liquor Control Amendment Bill 2018 will support local businesses, create more jobs and drive a new wave of activity through the hospitality industry by reducing regulatory burden on licensees and liberalising laws to give greater choice to consumers and visitors to the State. Among the suite of changes, patrons will be able to take home partially-consumed wine from a small bar or tavern if they choose to finish it later, which currently only applies to restaurants. The Bill also includes an amendment to streamline licensing arrangements for existing, established, local licensees to cater at temporary and pop-up bars at short-term events such as micro-festivals.²³
- **The State Government introduced liquor reforms aimed at preventing the further proliferation of liquor barns across the State.** Together with the changes to create a more relaxed and enjoyable drinking culture, the Liquor Control Act 1988 will be amended so the licensing authority will not approve an application if a proposed liquor store is bigger than a prescribed size and is located within a set distance from another large outlet. The proposed size and radius will be outlined in the regulations by the Director of Liquor Licensing to allow flexibility in different areas of the State. The changes will also prevent an application for a liquor outlet to be granted if it can already be met by existing businesses in the locality.
- In an effort to increase Western Australia's share of overseas students, **the State Government has foreshadowed a new graduate visa scheme to attract international students to Western Australia** but has no plans to reverse earlier policy decisions that have contributed to a plunge in the state's share of foreign students coming to Australia. The Graduate Skilled Migration List will give high-achieving graduates - PhD, masters, honours and other higher degree graduates - a pathway to skilled migration. It has also committed \$2 million to develop an international education strategy, with details to be announced later this year.²¹
- **The State Government released the Green Paper into the independent review of Western Australia's planning system for public comment in May.** The paper outlines the challenges for the planning system and proposes five key reform areas to help make the system more efficient, open and understandable to everyone. The five proposed reform areas centre on a system that is strategically led, legible, transparent, efficient and delivers smart growth. The review process has involved

consultation with a broad range of stakeholders, and also considered the merits and challenges of planning systems in other jurisdictions.²⁴

- **The Bill to end limitation periods for civil action by survivors of child sexual abuse was passed through both houses of State Parliament in April.** With the removal of this barrier, survivors of child sexual abuse will be able to seek justice and compensation in WA's civil courts, regardless of how many years ago the abuse occurred. The Bill provides a legal basis for suing institutions in the name of their current office holders for historical child sexual abuse and includes provisions to overcome the difficulties that survivors may face in identifying a proper defendant. The Bill also ensures that survivors are treated fairly by introducing a cap on the legal fees that may be charged to a plaintiff in child sexual abuse cases.²⁴
- For the first time in the State's history, **the West Australian community has been given access to proceedings in the Supreme Court with the live-streaming of the civil trial arising from the 2014 bushfires at Mt Helena, Parkerville and Stoneville.** Courts in the David Malcolm Justice Centre and most courts at the Stirling Gardens complex have the capacity to web stream. The web streaming facilities mean the Court can stream a hearing live to the internet or record a hearing and make it available to the public for download. The public can access live streams and recorded video from the Supreme Court website.²⁴
- To help address the Chinese Government's import restrictions on recyclable waste, **a taskforce has been established to advise on waste management in Western Australia.** The Waste Taskforce was created following consultation with State and local governments, the waste industry and community stakeholders. The Taskforce will provide advice on how to ensure Western Australia can

weather the storm of the China decision. The Taskforce will directly advise the Minister for Environment on recycling market issues and opportunities in WA. This advice will align with national actions to support recycling, the WA Waste Strategy and the promotion of the circular economy.²⁴

- **Consumers and the fitness industry have been invited to share their opinions as part of Consumer Protection's review into the Fitness Industry Code of Practice.** The code, introduced in response to misconduct by some operators in 2004, governs how the industry deals with consumers and their membership contracts in Western Australia. Under the Fair Trading Act, the current code provides protections including: a requirement for honesty and full disclosure when selling fitness services; a requirement for membership agreements to be in writing; a 48-hour cooling off period for membership agreements; a 12-month limit on prepayments for membership agreements; how to handle requests to terminate membership agreements; and how to handle complaints from clients.²⁴
- Drafted by the State Government, **the Market-led Proposals Policy is aimed at streamlining processes, reducing red tape and sets out a new, consistent process to enable the State Government to receive and evaluate unsolicited proposals from the private sector.** Market-led proposals are initiated by the private sector to build or finance public infrastructure, provide public goods or services, or purchase a government-owned asset, where government has not requested the proposal. The draft policy provides a single portal for the private sector to approach government with unique projects or services that meet government objectives, achieve value for money and deliver outcomes that will benefit Western Australians. This whole-of-government approach is a first for Western Australia, with similar policies already in place in every other

State and Territory.²³

- In conjunction with the Commonwealth Government's Small Business Regulatory Reform Agenda, **the McGowan Government is progressing with job-creating reforms that will be rolled out within the next three years.** Included among the reforms are initiatives aimed at streamlining licence applications and national park entry fee payments for eco and nature-based tourism businesses.²⁴
- **A water efficiency pricing model has been introduced in order to protect the State's most precious resource over the long-term.** The changes will deliver lower than expected water fees for everyday Western Australians, halving the forecast fixed water service charge increase from 6% to 3%. A large component of households' water bills is the fixed service charge, which does not reflect the amount of water a household uses. By halving the fixed service charge increase, households with lower water usage will benefit. To apply this reduction for the majority of Western Australians, WA's highest water users will receive an average increase to their water bills of about 16% for metropolitan customers and about 10% for regional customers. The representative household uses 240KL of water per annum, which equates to 1,041 wheelie bins full of water.²⁴
- Building on the **most significant investment into cycling infrastructure in the State's history,** this year's Budget saw an allocation of more than \$134 million over the next four years. This funding includes the bringing forward of \$18.7 million for construction to start on the highly anticipated missing section of the Fremantle Railway Principal Shared Path (PSP) in 2018-19. Over the next four years, a total of \$67 million will be used to close gaps along the Fremantle railway and Mitchell Freeway PSPs, completing an interconnected network of pathways extending 15 kilometres from the Perth central business district. To ensure continuity and to provide enhanced recreational, commuter and tourism cycling experiences, \$31 million will be available for the planning, design and construction of local bicycle infrastructure including safe active streets.²⁴

- **The City of Gosnells has rejected some measures in the State Government's Stop Puppy Farming consultation papers, saying it will make dog ownership too expensive for most residents.** The consultation paper was released for public comment in May, with a number of measures aimed at stopping puppy farming within WA, including mandatory dog de-sexing and breeding standards, a centralised registration system and turning pet shops into adoption centres. Gosnells mayor Glenn Dewhurst said the City's submission on the paper outlined concerns the proposals were a broad approach that would affect all dog owners instead of targeting those involved in puppy farming.²⁸
- **The State Government has called for a 10-year phase-out of conventional cages for egg-laying hens in its submission to the draft Australian Animal Welfare Standards and Guidelines for Poultry.** Public consultation on the draft national standards closed in March, with revised welfare standards documents to be developed following review of the more than 165,000 submissions received. The Government's submission also recommends a reduction in stocking densities for broiler chickens to 38 kilograms per square metre and linking stocking density to performance on welfare. The submission also recommends new minimum standards to ensure any new cages are enriched or furnished.²⁴
- **The WA Government will be given sweeping new powers to deal with troublesome councillors under new legislation sparked in part by the Perth City Council's woes. Legislation introduced into State Parliament in March would allow the Government to suspend or sack individual councillors who are failing to perform their function or duties, or whose conduct is causing dysfunction within their council.** Councillors accused of offences that would disqualify them from council, or also found to have seriously breached the Local Government Act, could also be suspended or sacked. Currently, the Government has the power to sack or suspend entire councils but not individual councillors.²⁹
- **The future of the suspended City of Perth council will hang on a recommendation by Barrister Anthony Power after his operations probe.** Mr Power was appointed by Local Government Minister David Templeman to commence an inquiry into the City of Perth's operations and affairs between October 1, 2015 and March 1, 2018 inclusive. He will consider if there was a failure to provide good government for the City of Perth community, the prospect of providing future good government and any necessary action to ensure ongoing good government. Mr Power's final report is due next year, in which he will recommend reinstating the council or sacking them. The council was suspended earlier this year after the Local Government Minister concluded there was a failure to ensure the City performed its functions properly. In March, three Commissioners were appointed to the City of Perth by the Minister. Chair of Commissioners Eric Lumsden, and Commissioners Gaye McMath and Andrew Hammond have outlined their plans for good governance at the City, and to return confidence to the ratepayers and wider community.²⁸
- **In April, the Westport Taskforce released the consultation report 'Westport: What you have told us',** which outlines the community feedback received during the first round of consultation on the development of the Westport: Ports and Environs Strategy. The consultation report outlines the feedback provided via hundreds of responses and how this information will help shape the approach in which the plan for Western Australia's freight, trade and logistics needs will be developed. Based on the feedback, Westport has identified 10 packages of research categories that will be pursued for the Westport Strategy. These include factors relating to future port facilities such as location, size, operating model and timing.²⁴
- **As of March, motorists are required to slow down to a maximum of 40 kilometres an hour when passing stationary emergency vehicles with lights activated on the roadside.** The SLOMO laws apply when passing Western Australia Police Force, Department of Fire and Emergency Services, St John Ambulance, roadside assistance, tow trucks and Main Roads Western Australia incident response vehicles that are responding to any roadside emergency across the State. The penalty for not slowing down is \$300 and three demerit points.²⁴
- **Hundreds of occupational licences and permits are being reviewed by the State Government's key economic regulator,** with the potential to save consumers tens of millions of dollars. In February, the Economic Regulation Authority commenced consultation for an inquiry into licensing and will report in February 2019. Nearly 600 different types of licences and permits have already been identified by the authority, while that number could grow substantially, with previous work suggesting the amount could be as high as 6,000. Beekeepers and timber workers are among the jobs that require registration, while small retail shops need certification. Local governments are also in the mix, with licences required for the transporting of butcher's waste.²⁰
- **Western Australia's fledgling hemp industry looks set to grow following amendments to the Industrial Hemp Act 2004** to allow hemp to be grown with a tetrahydrocannabinol (THC) content of up to 1%. Currently, the Industrial Hemp Act only permits hemp with a THC content below 0.35 per cent. Amending legislation on maximum THC concentration in line with national standards is expected to increase the number of varieties available for industrial hemp production in WA, particularly in food production through hemp

- seeds.²⁴
- **The State Government has announced a review of the Aboriginal Heritage Act 1972, the legislation that guides the way the State Government protects Aboriginal heritage in Western Australia.** The review aims to deliver a contemporary piece of legislation that: promotes the understanding and celebration of Aboriginal cultural heritage through the recognition of significant places and objects; provides transparent and easy to understand processes that offer certainty and predictability for stakeholders; and provides high standards of protection for significant places and objects, while enabling land use. The review includes three consultation phases, with the aim of having the amended Act pass Parliament by the end of 2020.²⁴
- **Up to 13,000 public sector employees currently employed on a casual or fixed-term basis will be considered for immediate permanency,** delivering better job security for workers and improved services for the community. Public servants who have worked for more than two years in fixed-term or casual contract roles are now eligible for permanent positions.²³
- **Plans have been announced to establish an alcohol and other drug treatment prison for male offenders at Casuarina Prison to help break the cycle of drug-related crime in March.** The treatment prison will be housed at one of four new units to be built at Casuarina Prison. The male treatment prison will operate as a standard prison but will include specialised treatment programs and management standards to help address drug addiction, which can lead to criminal behaviour.²³
- **The Australian Institute of Company Directors is considering plans to impose a target for women on the boards of small and medium-size companies** after a landmark report found that women account for just 15.8% of directors at companies immediately outside the ASX 200. By contrast, 27.9% of directors at Australia's 200 biggest companies are women. An analysis of the ASX 200-500 companies by the institute and executive search firm Heidrick & Struggles found that smaller companies tended to have fewer female board members. Women accounted for 17.1% of ASX 201-300 company directors but occupied just 14.1% of ASX 401-500 board seats.²²
- **A rail line to Yanchep and freeway expansions in Perth's north are the two highest priority initiatives for Western Australia,** according to Infrastructure Australia's project update in March, which has indicated a third runway at Perth Airport will likely be needed before a new harbour development. The projects were among nine on the priority list selected for the state by Infrastructure Australia, which was created by the federal government to provide independent analysis of infrastructure costs and benefits. In Perth's north, extension of the Joondalup rail line from Butler to Yanchep and lengthening the Mitchell Freeway from Neerabup to Alkimos could both be needed in the next five years. That was because congestion and delay costs on Marmion Avenue, Mitchell Freeway and Wanneroo Road would rise to be about \$2 billion annually, in 2011 dollars, by 2031. Priority projects included improved capacity on the rail network, the building of the Armadale Road bridge in Cockburn, the Bunbury Outer Ring Road and improved access to remote communities. A third runway at Perth Airport and improved port capacity were both priorities, although the extra runway would be needed in the next five to 10 years, while increased container terminal capacity would be needed in 10 to 15 years.²⁰
- **Landgate will be partially privatised in a move expected to raise at least \$640 million,** with the money to be used to fund the state's share of the National Redress Scheme for child abuse victims. It will be the second major privatisation by the McGowan Labor government, after Synergy's renewable energy assets were rolled out in a deal with CBus Super and DIF, and comes as the state continues to consider a sale of betting agency TAB.²⁰
- **Further details of how Perth and Peel will make room for 800,000 new homes within 30 years without further urban sprawl were revealed in July** by the state planning system's top public servant. The government has formed an implementation plan for the Perth and Peel@3.5 Million plan's four sub-regions – Central, North-west, North-east and South Metropolitan Peel. These include targets for the number and location of jobs to be delivered in each local government area, while protecting amenity and the environment, as the population reaches a projected 3.5 million by 2050. The final frameworks don't quite set "boundaries" for Perth but permit only half the homes to be "greenfield", the rest being infill as high and medium density in established areas. The drafts released by the former State Government in 2015 had received more than 1,100 submissions from the public, government and developers.²⁵
- **An online portal and advisory service to assist local businesses in securing State Government contracts was launched in March.** The portal will act as a central information source on how opportunities for local businesses to supply contracts can be maximised and provide an avenue for local industry to share feedback and seek advice. An advisory service has also been established to help local businesses and State Government agencies understand the new strategy. The State Government spends \$27 billion annually, and the government said WA businesses could obtain a larger share of this work.²⁰
- **Stage 1 of the \$3.8 billion multi-use redevelopment got underway at Belmont Park in May.** Over the 20-year life of the project, developers Golden Group expect \$10 billion to be injected into the economy and more than 25,000 local jobs to be created. The first stage of the project will see

the creation of 1,500 new apartments, 6,000 square metres of retail space and 20,000 square metres of commercial space. Located directly next to the train line, the redevelopment will have excellent connectivity and access to the central business district, airport, sporting and entertainment options, and will greatly benefit from the expansion and upgrade of METRONET.²³

- In May, **the State Government announced a once-in-a-generation partnership between the Department of Communities and Peet Brabham Pty Ltd that will change the face of Perth's urban development.** Located on the planned METRONET Morley-Ellenbrook rail line, the Brabham project will nestle on the doorstep of the Swan Valley. The development is expected to yield 3,000 homes, as well as schools, shops and recreational areas close to the proposed Whiteman Park train station, create and support 1,900 direct and 5,900 indirect jobs, and generate an estimated \$2.32 billion in economic activity.²⁴
- **The frequency of train services on the Fremantle and Midland lines will be boosted by 2021 as part of the METRONET expansion.** Passengers at stations between Claremont and Bayswater will have a train every five minutes during peak periods, once track and station upgrades are completed in coming years. The upgrades mean Fremantle Line passengers connecting at Claremont Station and the city will have a direct link through to the Forrestfield-Airport Link, including Airport Central Station.²⁴
- **The \$1.2 billion Perth Children's Hospital was officially opened in May,** signalling in a new era in paediatric health care in Western Australia. It will be the State's only specialist paediatric hospital and major trauma centre, providing first-class medical care to the children of WA. The 298-bed hospital will have expanded clinical, research and

education facilities, and has been purpose-built to improve the hospital experience of patients, parents, siblings and carers.²³

- **The State Government has announced a unique partnership opportunity for the private sector to deliver some of Western Australia's biggest urban infill and job-creating projects in May.** Collectively branded as 'The Precincts', these developments will set a new benchmark for medium-to-high density urban infill in WA, and deliver 5,000 new homes in Bentley, Joondalup, Beaconsfield and Cannington over the next 15 years. The State Government called for expressions of interest from private developers to achieve The Precincts' vision of 'neighbourhoods with heart and soul' for the first two projects delivered by this initiative - Connect Joondalup and Bentley 360. Situated within the Joondalup activity centre, Connect Joondalup will see about 1,600 new dwellings built on the 10.1 hectare site and facilitate the transformation of Joondalup into a mature and sustainable city. The construction period is expected to inject \$1.19 billion into the State's economy and create and support almost 2,470 jobs. At 21.1 hectares, the Bentley 360 component is one of the most significant infill redevelopment sites in Perth. It represents an extraordinary opportunity to transform the site into a vibrant, thriving and integrated residential development of at least 1,500 dwellings, breathing new life into the Bentley area. Bentley 360 is expected to create more than 2,200 jobs across the course of development and inject an estimated \$1.09 billion into the State's economy during construction.²³
- **Ellenbrook continues to build its reputation for innovative affordable housing options, with the State Government formally opening two micro lot display homes in April.** These are the first dwellings in a creative trial of 11 micro lot homes on green-title sites all less than 100 square metres. The micro lot project, a collaboration between the State Government, Ellenbrook and developers Now Living, aims to challenge traditional concepts of the family home. The Government owns nine lots in the first stage of the project, with houses to be constructed and sold through Keystart's shared equity program. The first stage will offer 11 new two-storey homes, including the two display homes. Designs include two and three-bedroom homes for a range of residents, including younger people wanting to buy their first home close to amenities and downsizers hoping to stay in the area.²⁴
- **Development approval has been granted for a \$158 million two-tower development adjacent to Perth Arena, as part of the Perth City Link project.** The Perth Hub development will be built by Far East Consortium at Lot 2 and 3A in the Perth City Link development area. The first building is a 32-storey mixed-use tower with 314 apartments and 217 parking bays, supported by retail tenancies and a tavern at street level. The second building will accommodate the four-star Dorsett Hotel - a 23-storey tower with 263 hotel rooms and a range of dining options and amenities for arena patrons, city workers and visitors to Perth.²⁴
- **An innovative development comprising a childcare facility and aged care is being built at LandCorp's Claremont on the Park project.** Oryx Communities has been named as the preferred proponent to develop a \$107 million multi-generational facility. Known as The Queenslea, the development proposes to provide aged care for about 115 residents and offer a variety of housing options and support services. It will include in the order of 60 fully serviced independent and assisted living units with the capacity to respond to Western Australia's demand for accommodation for National Disability Insurance Scheme supported residents.²⁴
- **Apartment developer Blackburne has sketched out ambitious plans for one**

of Perth's most contentious properties, after paying \$25 million for the Subiaco Pavilion Markets site. Managing director and owner Paul Blackburne said his team was planning to invest \$250 million in the site and was excited by the unique opportunity to bring a high-quality residential, retail, restaurant and entertainment precinct to Subiaco. Blackburne did not specify details of its plans but released drawings showing an apartment building of at least 14 storeys, along with laneways and open plazas.²⁰

- **Singapore-listed Fragrance Group is one step closer to realising its \$180 million vision for a two-tower hotel-cum-office and residential development in the CBD's west end**, with the City of Perth giving the project the green light. The City of Perth Local Development Assessment Panel ruled in favour of the development following the recommendation for approval by the City's planning officers. Located on the corner of Milligan and Murray Streets, the project includes the construction of one 28-storey office and residential building, comprising 19 dwellings, and a second, 36-storey tower with 406 hotel rooms, a swimming pool and associated dining and retail uses.²⁰
- **Finbar Group has invited expressions of interest from hotel operators for a proposed 18-storey hotel located on Adelaide Terrace**, a site previously home to the ABC. Draft concept plans for the hotel development at 187 Adelaide Terrace include more than 300 rooms and activated ground floor lobby areas, over 500 square metres, subject to the City of Perth local development assessment panel approval on the advice of the Heritage Council of WA and the City of Perth. The redevelopment of the site represents the fourth and final stage in Finbar's redevelopment of the larger site known as Symphony City,

which it is undertaking as a joint venture with landowner Ventrade Australia.²⁰

- **A private syndicate of local investors led by Australian Development Capital (ADC), with a cornerstone investment by the Warburton Group have entered into a contract with the Department of Planning, Lands and Heritage to purchase 20 Bronte Street, East Perth.** Last year, ADC/Warburton purchased the adjacent Old Perth Girls School property. ADC/Warburton plan to develop the Old Perth Girls School and 20 Bronte Street as an integrated precinct, containing a mix of land uses potentially incorporating residential, retail, office accommodation and community space. It is known that 20 Bronte Street was a cemetery during the early days of Perth and potentially hundreds of human remains are buried at the property. As a condition of the sale, ADC/Warburton must enter into a Heritage Agreement which will govern the remediation process and ensure exhumation and reinterment is conducted in an ethical manner.²⁴
- **The new Inner City College in Subiaco has been given the official go-ahead with development approval granted for stage one of the project.** The future 2,000-student school is a key element of plans to transform Subi East into a vibrant new education, leisure, residential and community destination on the fringe of the Perth central business district. The first stage of the school includes health and physical education, technologies and science, and student services, with a cafeteria, library and lecture theatres. Spaces for socialising and recreation are integrated throughout with sporting hard courts, an amphitheatre and landscaped courtyards. Forward works are progressing well at the school's iconic location next to Subiaco Oval, with construction of the state-of-the-art secondary facility commenced in July.²⁴
- **Osborne Park Hospital will undergo a major transformation with record funding of \$24.9 million allocated in the 2018-19 State Budget.** The expansion includes a new level 2A neonatal nursery for local mothers with low to moderate risk pregnancies. The enhanced obstetric services will enable more mothers to give birth closer to where they live. A new 10-bed rehabilitation unit will also form part of the expansion of healthcare services at Osborne Park Hospital. The unit will specialise in caring for a range of patients requiring rehabilitation following a stroke, amputation and neurological conditions.²³
- Two of Western Australia's property industry leaders, **Dale Alcock and Tony Fini, have teamed up to deliver a 20-home development, on a 3,423 square metre site in Cannington, targeting the 'missing middle' in Perth's residential market.** The missing middle phenomenon has emerged in the state's property sector of late, with building approval trends showing substantial development at both ends of the density scale – for semi-detached homes and four-storey plus apartment complexes – but a lack of activity servicing mid-range projects, for apartment and townhouse developments at two to three storeys. Designed by Perth-based Braude Architects, Mode is a low-rise - partly two and three-storey, medium-density development, comprising 15 townhouses and five apartments, as well as communal areas, barbecue facilities, a play area and communal garden.²⁰
- Property developer **Garry Brown-Neaves unveiled a new 18-hectare commercial and industrial precinct within the existing Forrestdale Business Park, bordered by Ranford Road and Alex Wood Drive in March.** Precinct 95 presents an array of lot sizes from 1,761 square metres to just over 3 hectares. BP has already secured the entry point site to the estate. Stage 1A has now been launched to the open market; it comprises nine titled industrial lots ranging from 1,897sqm to 3,064sqm, all prominently located along Alex Wood Drive with water,

sewerage and power available and ready to be connected.²⁰

- **A dedicated taskforce will develop a Pickering Brook and Perth Hills sustainability and tourism strategy to provide planning certainty for residents and businesses, to help maximise the tourism potential of the Perth Hills.** In June, the State Government identified Pickering Brook for further planning investigation in the final North-East Sub-regional Planning Framework. The taskforce will examine all the issues, including a rejuvenated town centre for Pickering Brook, accommodation facilities, diversification options for existing horticultural businesses and branding for the Perth Hills. Existing landowners and orchardists will be consulted to ensure the cultural value of the precinct is retained and strengthened. Local government representatives will also be part of the taskforce consultation.²³
- **An agreement between LandCorp and the City of Joondalup has set the framework for the development of the new Ocean Reef Marina precinct in Perth's north.** The world-class development, with a planned 550 boat pens, more than 200 boat stackers, an expected 1,000 houses and apartments, and 12,000 square metres of retail and commercial space, will create a new hub of recreational amenity, living opportunities and tourism in Perth's fast-growing northern corridor. The precinct is also expected to include hotel and short-stay accommodation. Construction is expected to begin on the new marina in 2020.²⁴

Lifestyle

- **Perth has dropped out of the top 10 in a world liveability index** compiled by The Economist Intelligence Unit, after falling seven places in

2018. The global liveability index ranks cities across the world based on a range of factors across five broad categories – stability, healthcare, culture and environment, education, and infrastructure. After coming in at seventh the previous year, Perth slipped to 14th in 2018. Despite the fall, Perth's overall score had not dropped, rather other cities had overtaken it. Melbourne relinquished top spot in the index for the first time in seven years, with Vienna moving into the number one ranking in 2018.²⁰

- **Perth was named in the world's top 10 healthiest cities, ranking behind only one other Australian city.** Perth and Adelaide were the only cities not from Europe to rank in the top 10 list compiled by online home rental booking platform Spotahome. Cities were judged on 10 criteria including annual sunshine hours, life expectancy, work-life balance, number of fast food outlets, obesity, air and water quality and annual holidays. Amsterdam was number one with a score of 6.97, Adelaide ranked eighth with a score of 6.31, and Perth tenth with 6.30. Perth received its best score in the annual hours of sunshine category, ranking ninth behind cities including Abu Dhabi, Cairo, Dubai and Los Angeles. Perth also ranked highly in the life expectancy at birth category, making 14th on the list.²⁶
- The online **Perth Perception Survey conducted by Ipsos for the Committee for Perth found that only 59% of people surveyed said they were satisfied with living in Perth, a substantial fall from the 73% just three years ago.** Two-in-five households reported being financially worse off than they were five years ago and only 37% thought their economic situation has improved. Forty-one percent of people say there aren't enough jobs for their skills and there are less jobs available here than elsewhere, and more than a third aren't happy with their employment prospects in Perth. Overall 41% of people thought Perth has changed for the better, down from 60% in 2015, while 33% thought it had changed for the worse, up from 25%. Urban

development, infrastructure and entertainment were given a tick of approval, while cost of living, social issues and infrastructure were seen as getting worse. While infrastructure was seen as being good and bad, the survey discovered there was strong support for new developments like the freeway expansion, Perth Arena, Optus Stadium, rail investment and Metronet.³¹

- Optus Stadium was acknowledged in different categories at three events. **The Stadium, built by Multiplex and co-designed by HASSELL, Cox Architecture and HKS, topped both the 2018 Master Builders-Bankwest Excellence in Construction Awards, and the annual Landscape Architecture Awards.** Previously, the new Stadium has been recognised for its construction and design, with success at the 2018 Australian Institute of Architecture awards, where it won top prize.²⁰
- **Optus Stadium welcomed its one millionth visitor ahead of June,** as the ground celebrated recording the second-highest average AFL attendance in the country, behind only the Melbourne Cricket Ground. After 12 AFL matches at Optus Stadium, the venue had an average attendance of 48,625 - second only to the MCG's 54,239. The average attendance for AFL matches represents a 41% increase in AFL football attendance in Western Australia, following the move from Subiaco Oval to Optus Stadium.²⁴
- **Football fans attending games at Optus Stadium now have the option of taking a ferry, after the opening of the new \$5 million Burswood Jetty in June.** Private ferry services to the stadium were in place for the first weeknight fixture on Thursday after Captain Cook Cruises secured exclusive access to a dedicated berth at the new facility for major events at Optus Stadium and priority access for the remainder of the time. On an event day, Captain Cook Cruises is expected to pick up and drop off up to 1,440 people on two return services across five vessels. In addition, other charter operators and

the public can use the additional two berths for drop off and pick up of patrons, further enhancing the capacity of the jetty to deliver people to the Optus Stadium precinct.²⁴

- **Yagan Square opened in March with a traditional Whadjuk welcome and official ceremony.** Lined with seating and trees, Yagan Square provides a direct connection between William Street from the Perth central business district and Northbridge, further improving access across the Perth Train Station, Perth Busport and Perth Arena. The \$73.5 million precinct boasts a Market Hall of international cuisine and local produce, a 45-metre digital tower and canopy, amphitheatre and children's playscape. The precinct design and material used, such as the building facades and the selection of trees, reflect Aboriginal stories and the unique Western Australian landscape.²³
- **The brand new Scarborough Beach foreshore opened in March,** boasting international skate facilities, play space, public amenities and new job opportunities along the foreshore. The \$100 million development features the new Transit Hub, Scarborough Beach Pool, the popular Sunset Hill and changes to parking and roads to make the area more pedestrian friendly and improve connections between foreshore businesses and the ocean. In a nod to Scarborough's cultural heritage, the famous Snake Pit has returned and will be a popular attraction providing recreation facilities for all ages and abilities, including a 12-foot, competition-grade skate bowl for local use, events and global competitions.²³
- **The refurbishment of His Majesty's Theatre continues, following the State Government's \$6.5 million investment** to maintain the world-class venue for opera, dance and theatre. This includes funding for the installation of an orchestra pit lift to improve occupational health and safety at the venue. His Majesty's public areas will also be improved, providing more hospitality opportunities and upgrades of the foyer areas. His Majesty's was built in 1904 and welcomes more than 100,000 visitors a year.²⁴
- **Western Australia has been announced as the successful host of the third World Indigenous**

Tourism Summit in April 2020.

Thanks to a successful bid by the WA Indigenous Tourism Operators Council (WAITOC), with support from the Perth Convention Bureau (PCB) and the State Government through Tourism Western Australia, the summit is expected to attract hundreds of delegates from around Australia and the world. The summit brings together Indigenous tourism operators and world leaders to discuss economic, environmental, social and political advances and challenges in Indigenous tourism. It also provides a forum for Indigenous people to share collective wisdom, knowledge and traditions handed down through generations.²⁴

- History was made when the **inaugural nonstop Qantas Dreamliner flight departed Perth for Heathrow Airport in March.** The daily QF9 begins in Melbourne, flying to Perth before flying nonstop to London and returning as QF10.²³
- One of the greatest tennis players of all time, **Roger Federer is set to return to Perth to compete in Western Australia's premier tennis tournament, the Mastercard Hopman Cup in 2019.** The 20-time Grand Slam champion will pair up with Belinda Bencic for Team Switzerland to defend their 2018 title. The duo will again be joined by the German team, and 2018 runners-up, current world number three Alexander Zverev and two-time Grand Slam champion and former world number one Angelique Kerber. This year's tournament at Perth Arena made history with a record total tournament attendance of 106,424, and a further 5,688 fans viewing Federer's open practice session with Australia's Thanasi Kokkinakis. The tournament has been secured in WA until 2022.²⁴
- **The eye-catching and extravagant costumes and accessories of one of the world's most popular performing artists, Kylie Minogue will go on show at the WA Maritime Museum in Fremantle in February 2019.** The Western Australian Museum has signed the deal to stage the

Kylie on Stage exhibition which features dozens of onstage costumes and gowns worn by the renowned 'Princess of Pop' on her international tours over the past 25 years. The exhibition features the work of international designers such as Dolce and Gabbana, Jean Paul Gaultier, Karl Lagerfeld and Australian designers Mark Burnett and Peter Morrissey.²⁴

- **The State Government, through Tourism WA, has signed a two-year funding deal to support WA's biggest annual racing festival, the TABtouch Masters, in 2018 and 2019.** The event is the world's only single-track thoroughbred racing festival featuring a Group One race worth at least \$1 million on three consecutive Saturdays. Held in November and December at Ascot Racecourse, the event includes the Railway Stakes, Winterbottom Stakes and the Kingston Town Classic.²⁴
- Internationally renowned food writer and television cook **Nigella Lawson will be returning to Western Australia to headline this year's Margaret River Gourmet Escape.** Visitors can get acquainted with Nigella at a series of events, including the Gourmet Beach BBQ, Nigella's Tea Party at Howard Park Winery, as well as appearances and a book signing at the Gourmet Village.²⁴
- **The State Government, through Tourism Western Australia, will sponsor the 2018 Swan Valley National Polocrosse Championships,** which are expected to attract more than 1,500 visitors to Perth. A combination of polo and lacrosse, polocrosse was developed in Australia in 1938. It now features more than 4,000 players nationally and has extended to countries such as New Zealand, the United States of America, Canada, South Africa, the United Kingdom and Ireland. More than 570 players and strappers will participate in the championships across seven days, in categories ranging from under 12 juniors to masters.²⁴
- **Work is underway on the construction of the new \$20 million luxury eco village at Pinky Beach on Rottnest Island.** Set in the dunes of Pinky Beach, Discovery Eco Village Rottnest Island will offer guests the

chance to experience the island's spectacular natural environment in low-impact, high-quality eco-tent accommodation. The retreat will consist of 83 eco-tents with ensuite pods, connected via elevated walkways through the dunes to the Pinky's Beach Club complex complete with a swimming pool, alfresco bar and licensed dining areas. The first guests are expected by the end of 2018.²⁴

- **Hotel Rottnest will undergo a major expansion to provide a premium accommodation option for guests to Rottnest Island.** The hotel, which will be re-opened as Hotel Rottnest Resort, will add another 80 rooms and nearly double in size from 9,000sqm to 17,800sqm. The resort will include four pools - two main pools and two plunge pools for executive suites, a restaurant, function room for 250 people seated or 400 cocktail-style, gym and rooftop bar. The development was approved after detailed heritage and environmental studies, and public consultation undertaken by the Rottnest Island Authority.²⁴
- **Visitation records are redefining the traditional peak season for Rottnest Island with more than 80,000 visitors flocking to the island in March 2018.** Additional ferry services and value for money offerings by ferry operators has played a role, with visitation by ferry up 37% compared with the same month last year. This marked the sixth consecutive month of increasing visitor numbers by ferry since October 2017, and Rottnest Island has already recorded a 15% overall increase in visitation to March compared with the previous year.²⁴
- **Box office sales for Perth's two major arts festivals have remained steady against last year's figures,** with Perth Festival making \$3.8 million and Fringe World Festival hitting \$10 million. While Fringe World more than doubled the revenue of Perth Festival, the two leading arts bodies operate contrasting business models. Perth Festival covers the costs of artists in advance, while Fringe World acts as a platform for emerging and established artists to take their own risks and reap the rewards, or losses.²⁰
- **Iain Grandage has been named as the next Artistic Director of Perth Festival for 2020 to 2023.**

Raised and educated in Perth, Mr Grandage is one of Australia's most respected and acclaimed collaborative artists, having won Helpmann Awards for music directing and for theatre, dance, opera and silent film compositions. Mr Grandage's experience with Perth Festival includes the musical direction of Home, the opening performance of the 2016 festival. Home celebrated 40,000 years of Aboriginal culture, shining a light on Western Australian stories and landscapes.²⁴

Knowledge and innovation

- **A new mining research centre to be jointly based in Western Australia and South Australia and backed by 34 industry and academic partners opened in March,** after the federal government committed to provide \$50 million in funding. The MinEX CRC's partners will contribute \$165 million, cash and in-kind, over the next 10 years, taking its total 'budget' to \$215 million. The national research initiative is aimed at developing technologies to increase the discovery of mineral deposits. It will focus on the development of technologies that unlock the potential of mineral deposits that are located under deep rock cover. It will also seek to improve the productivity of drilling, and collect data while drilling, driving down the time and cost of deposit "drill-outs" and bringing forward production. One specific goal is the development of cheap, safe and environmentally friendly 'coiled tubing' drilling to build a 3D picture of the subsurface and extract deposits more efficiently and effectively.²⁰
- **As part of the State Budget, the government announced \$5.5 million in provisional funding to the Minerals Research Institute of Western Australia (MRIWA),** to support development and manufacturing of technology metals and renewable energy sources. MRIWA will invest the funds, if successful, in its bid to establish a New Energy Industry

Cooperative Research Centre (CRC) in WA. The New Energy Industry CRC's objective will be to create value, through industry-led research, and drive global demand for local products, services and solutions.²³

- **The State Government has unveiled plans for its third innovation hub, to provide training and develop skills for Western Australians to take on WA jobs in the rapidly growing field of data science.** The WA Data Science Innovation Hub will be run in collaboration with Curtin University and run across Curtin's Perth and Bentley sites to ensure maximum engagement with industry. It will be officially launched next month with an industry event. The State Government is providing \$800,000 over four years, through the \$16.7 million New Industries Fund, for a Business Connector to manage the hub and Curtin University is also providing \$800,000 towards the hub over four years.²⁴
- **\$1.2 million has been committed by the State Government to establish a medical technology, biotechnologies and pharmaceuticals innovation hub** to grow Western Australia's life sciences sector and support local jobs. The hub is in partnership with MTPConnect and The University of Western Australia and will be called the WA Node of MTPConnect. This node will employ staff to focus on: digitally enabled MTP (Med Tech Pharma) solutions – particularly rural and remote applications; the development of medical devices; precision medicine and regenerative medicine products and services including utilising the State's internationally recognised capability in phenomics; focus on clinical trials and development of pre-clinical expertise and capability; skills development in product translation and commercialisation; and investment attraction.²⁴
- **The State Government is investing \$24 million into research and development** to drive growth and keep the State's grain industry internationally competitive. This investment provides \$10 million

per year to underpin a long-term model for the sustainable delivery of applied grains research and development, in partnership with the Federal Government and other funding sources. An additional \$4 million investment in 2018-19 will provide a short-term grains R&D boost to ensure critical programs and capacity are continued. Western Australia is a world leader in grains production and research but with accelerating competition from Black Sea and Argentinian producers, WA's grain industry must continue to grow and boost its productivity. WA is the biggest grain producer in Australia, exporting more than 85 per cent of its production.²⁴

- **Fiona Stanley Hospital will be the first public hospital in Western Australia to offer robotic urological surgery after taking delivery of a da Vinci system as part of a \$5 million State Government investment.** The da Vinci system will allow suitable public patients requiring urological procedures to receive robotic-assisted prostate and kidney surgery. The \$5 million system is the first of its kind in a WA public hospital and makes Fiona Stanley Hospital one of only seven public hospitals in Australia with this robotic surgical capability. The da Vinci program provides the surgeon with 3D vision, magnification capabilities and enhanced dexterity to manipulate and dissect areas where access is challenging or limited with the human hand.²⁴
- A report released in June shows **Western Australia would be an ideal home for the Australian National Space Agency.** The ACIL Allen report concludes WA has geographic advantages and expertise required to have a thriving space industry, which align with the objectives of the Australian Space Agency. The priority areas for the space agency include communications technologies, satellite data, Space Situational Awareness and debris monitoring, artificial intelligence, robotics and big data analytics. There are already 74 international and Australian companies with a presence in WA operating in space and space related services. The report was commissioned by a Steering Group, chaired by WA Chief Scientist, Professor Peter Klinken

AC, of stakeholders from the space sector, including the State's four universities.²⁴

- **In June, the inaugural WA Defence Industry Capability Directory was launched.** The directory will be used to promote the Western Australian defence industry in Australia and overseas and is the result of the defence industry capability assessment undertaken by TCF Services, on behalf of Defence West. The capability assessment asked businesses to examine their capabilities and assess them against the six capability streams of the Defence Integrated Investment Program. This directory will be provided to key decision makers in Australia and circulated to the State Government's overseas offices for promotion to international markets. The directory also includes capability information of all four Team WA universities - The University of Western Australia, Curtin University, Murdoch University and Edith Cowan University, as well as South Metropolitan TAFE.²⁴
- **Moves to encourage downstream lithium processing in Western Australia continued with the State Government announcing a taskforce to develop a strategy for the sector in May.** It comes a day after Wesfarmers was mooted to be considering an entry into the battery manufacturing space, setting up a plant in Kwinana, while representatives from US electric vehicle maker Tesla met with Premier Mark McGowan. The taskforce held its first industry consortium in June.^{20&24}
- **The State Government announced the goals and pillars of Western Australia's first ever State STEM skills strategy to drive WA's future jobs and future skills.** With more than \$3.3 million to fund professional development of more than 1,000 teachers in lower socioeconomic public schools over the next four years, STEM communication, mentoring programs, and digital and technology programs. The strategy aims to: prepare students with STEM skills for the jobs of the future; upskill the current workforce with STEM skills that are required

to embrace a technological future; increase the participation of under-represented and disadvantaged groups; and increase STEM culture and the community's recognition of the importance of STEM skills.²⁴

- With the planning and construction of new METRONET lines underway, **the State Government is spending \$34 million on new cashless ticketing devices and a new card system** that could allow for features like mobile phone payments. Installation of the new devices will begin in 2019, with the first expected to be in place by the middle of the year. The new system will require passengers to swap their old SmartRider with a new one. The Public Transport Authority have confirmed this will be done free of charge and passengers will be given several months to swap over before the upgraded system comes into effect.²⁵

¹ ABS 5220.0 State Accounts and 5204.0 National Accounts; WA 2017-18 Government Mid-Year Financial Projection Statements and Australian 2017-18 Mid-Year Fiscal and Economic Outlook

² ABS 5220.0 State Accounts

³ Reserve Bank of Australia, Statistical Tables

⁴ ABS 3101.0 Australian Demographic Statistics

⁵ ABS 6202.0 Monthly Labour Force

⁶ ABS 6291.0.55.003 Quarterly Labour Force

⁷ ABS 6202.0 Monthly Labour Force; and 6354.0 Job Vacancies

⁸ 6302.0 Average Weekly Earnings; and 6345.0 Wage Price Index (2008-09)

⁹ ABS 5220.0 State Accounts; and 5206.0 Quarterly National Accounts

¹⁰ ABS 5625.0 Private New Capital Expenditure

¹¹ ABS 8412.0 Mineral and Petroleum Exploration

¹² ABS 6416.0 Residential Property Price Indexes; and 6401.0 Consumer Price Index (2011-12)

¹³ ABS 8752.0 Building Activity; and 8762.0 Engineering Construction

¹⁴ ABS 8731.0 Building Approvals; and 5609.0 Housing Finance

¹⁵ ABS 5368.0 International Trade in Goods and Services; 5220.0 State Accounts; and 5206.0 Quarterly National Accounts.

¹⁶ ABS 5368.0 International Trade in Goods and Services

¹⁷ ABS 5368.0.55.004 International

- Trade in Services by State
¹⁸ Tourism Research Australia, International and National Visitor Surveys
¹⁹ WA Department of Mines, Industry Regulation and Safety, Resource Data Files
²⁰ Business News
²¹ The West Australian
²² Australian Financial Review
²³ Premier's media statement
²⁴ Ministerial media statement
²⁵ WA Today
²⁶ Perth Now
²⁷ Digital Financial Analytics
²⁸ Community News
²⁹ ABC online
³⁰ FACTBase report
³¹ Perth Perception Survey
³² Construction Training Fund Construction Industry Snapshot for WA, June 2018

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