Peel Development Commission

PEEL

TOURISM ECONOMIC DEVELOPMENT INFRASTRUCTURE STRATEGY

2016–20

PROGRESSIVE | PROSPEROUS | DYNAMIC

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GLOSSARY

Tourism Comprises the activities of persons travelling to and staying in places outside their usual environment (i.e. place of residence) for not more than 12 consecutive months for leisure, business and other purposes.

Adventure traveller	A visitor with an interest in undertaking activities in the outdoors that deliver an experiential (exhilarating) value driving their motivation to seek adventure.
Business visitor	A visitor who nominates 'business' as their primary reason for travelling or visiting a particular location; usually comprises travel for work, business, attendance at conferences, conventions, exhibitions and trade fairs, and training and research related to employment.
Daytrip visitor	A visitor who travels for a round trip distance of at least 50km from their place of residence, or is away from their home for at least four hours, and who does not spend a night away from their usual residence during their travels.
Domestic overnight visitors	People aged 15 years and over who undertake an overnight trip of one night or more and travel at least 40 kilometres away from their usual place of residence.
Domestic travel	Domestic travel is travel by Australians within Australia (including to Australian external territories such as Christmas Island).
Domestic visitor nights	The number of nights a visitor spends away from their usual place of residence while on a trip or travelling within Australia.
Duration of trip	Refers to the time spent during a trip or visit measured from when leaving from until returning to a usual place of residence; a trip duration ends when returning home from either a same-day visit or an overnight trip.
Enabling infrastructure	Infrastructure identified for investment which will enable growth of the tourism sector to improve economic development opportunity and job creation
Hard adventure	Physically challenging outdoor activities such as scuba diving, white water rafting, bungy jumping, skydiving, mountain biking and rock climbing.
Holiday/leisure visitors	Visitors whose primary reason for travelling is having a holiday and comprises holidays, travel for leisure, relaxation, "getting away", entertainment, sport and shopping.
International visitor	A person who is visiting Australia, resides overseas and have been in Australia for less than one year. International visitor nights is the number of nights spent away from home, in association with individual visits by an international visitor.
Interstate tourism	A person visiting a state or territory other than that in which they usually reside. An interstate visitor night is any night spent in a state or territory other than that in which the visitor resides.
Intrastate tourism	A person visiting a location — away from their usual residence — in the State or Territory in which they reside. An intrastate visitor night is any night spent away from their usual residence in the same State or Territory in which they usually reside.

Purpose of visit	Purpose of visit is the main purpose, or the major reason for visiting a particular location. The major categories of purpose of visit include Holiday/leisure, VFR, business, and Other where 'other' includes travel for educational purposes, personal appointments, health reasons, and employment/leisure purposes (e.g. working holiday).
Short/medium/long haul	The relative distance a visitor travels from their place of residence to a destination for travel purposes. Can refer to air, road and sea travel including self-drive travel in a car, 4WD, motorhome, motorbike, etc.
Soft adventure	Light physical activities such as bushwalking, wildlife watching, hot air ballooning, etc. and enriching, indulgent activities such as eating/dining out, wine tasting, art appreciation, museum/gallery viewing, etc.
Tourist	A visitor who stays at least one night in accommodation in the country or place visited (i.e. overnight visitor); or travels more than 50km or 4 hours to a place and returns to their usual place of residence the same day (i.e. daytrip visitor).
Tourism lifecycle	A concept used to track the progress of a tourism region as reflected by the number of visitors relative to the potential capacity of the destination. The lifecyle commences at exploration and moves through involvement, development, consolidation, stagnation and rejuvenation as visitor and capacity levels progressively increase until they plateau and later increasing or decreasing.
Tourism regions	Tourism regions are formed by the aggregation of SLAs. TRA and the ABS use tourism regions to enable comparability of regional data from different tourism surveys.
Trail hub	A location where one or more trails begin/end and trails users gather to access amenities and/or prepare for or wind-down from trail usage.
Trail network	Two or more trails that converge and share common surrounds or infrastructure such as a town, hub, access routes, parking, connecting links, stopover points, geographical features (river, forest, hills/scarp, dam) or conservation estate.
Visitor expenditure	Expenditure by visitors during a trip, including airfares and other transport costs and amounts spent on trip-related items before, during and after the trip, until they return to their usual place of residence.
Visiting friends and/or relatives	Visitors who nominate visiting friends and/or relatives as their primary reason for travelling; can include travel to attend the wedding of a friend or relative, travel to attend a funeral or travel to visit and/or stay with friends and/or relatives.

ACRONYMS

ABS	Australian Bureau of Statistics
CoM	City of Mandurah
CRC	Community Resource Centre(s)
DPaW	Department of Parks and Wildlife
DRD	Department of Regional Development
IVS	International Visitor Survey
LGAs	Local Government Authorities
MAPTO	Mandurah and Peel Tourism Organisation
NGO	Non-Government Organisations
NVS	National Visitor Survey
Peel CCI	Peel Chamber of Commerce and Industry
PCB	Perth Convention Bureau
PDC	Peel Development Commission
PHCC	Peel Harvey Catchment Council
PRLF	Peel Regional Leaders Forum
PTEDIS	Peel Tourism Economic Development Infrastructure Strategy
RDA	Regional Development Australia, Peel
SLA	Statistical Local Areas
TA	Tourism Australia
TCWA	Tourism Council of Western Australia
TRA	Tourism Research Australia
TWA	Tourism Western Australia
VC	Visitor Centre(s)
VFR	Visiting Friends and Relatives
WAITOC	Western Australian Indigenous Tour Operators Council
WAPC	Western Australian Planning Commission

CHAIRMAN'S WELCOME

Tourism Strategy

The *Peel Tourism Economic Development Infrastructure Strategy* identifies investment opportunities to enable future infrastructure that will deliver strong regional economic benefits. It underpins our Blueprint and sets out a long term vision against short-medium term priorities by proposing specific projects aligned with identified themes:

1. Trail hubs
2. Trail networks
3. Accommodation nodes
4. Waterways adventures
5. Event, tourism and hospitality innovation
6. Mixed adventures

Tourism visitation accounts for an estimated spend of $400 million per annum in the Peel, equalling 8.6% of total visitor spend in regional Western Australia and 4.8% of total visitor spend in the State. In order to capitalise on our unique natural landscape and existing tourism adventures, our Peel Regional Investment Blueprint supports Tourism Western Australia's pillars for growth through focusing on the development of built and workforce infrastructure and establishing connections of experiences to attract and extend visitor stays.

Our key areas of focus for Tourism Excellence are growth through investment, and creating a network of diverse adventures. To this end, we have a key focus on the development of environmental tourism, eco-tourism, heritage tourism, marine tourism, Indigenous tourism and experiential or adventure tourism.

The same factors which appeal to leisure visitors here also drive visitation to events and, increasingly, the Peel's burgeoning business tourism sector. The opportunity for enabling infrastructure investment to underpin and broaden diversity within tourism is high on our agenda.

Working co-operatively with a range of stakeholders to create this strategy has reflected the tremendous advantages of our natural assets and the burgeoning culture of tourism that exists in our region. It is an exciting phase of this significant sector's development for our region and indeed our state.

Paul Fitzpatrick
Chairman, Peel Development Commission

EXECUTIVE SUMMARY

The purpose of the *Peel Tourism Economic Development Infrastructure Strategy* (Strategy) is to identify tourism investment opportunities in enabling infrastructure across Peel that will deliver strong regional economic benefits. It underpins the *Peel Regional Investment Blueprint* (Blueprint) which has objectives to grow the Peel tourism economy through infrastructure investment and product diversification along with creating a network of diverse adventures which attracts visitors and extends their stay.

Key infrastructure initiatives

1. Dwellingup Trails and Adventure Hub
2. Peel Regional and National Parks investment
3. Marine and waterways adventures

The Strategy sets a long-term vision against short-medium term priorities aimed at generating strong economic growth across the Peel region through infrastructure investment, enterprise and employment opportunities.

The objective is to increase year-round tourism visitation and expenditure — both daytrips and overnight visitors — in line with Tourism WA's goal to double tourism expenditure in WA to $12 billion p.a. by 2020.

In turn, an increase in visitation and expenditure is expected to grow employment, activate existing and new enterprises, and increase the relative output and role of tourism within Peel's economy. The following aspirational targets for 2020 (and shown below compared with Peel's 2015 visitor levels reported by TA[1]) have been adopted:

690,500	**domestic overnight visitors** (26% increase on 2015)
39,150	**international visitors** (38% increase on 2015)
3.23m	**daytrip visitors** (31% increase on 2015)
$774m	**in visitor expenditure** (47% increase on 2015)
1,190	**new operational jobs**[2]
326	**new construction jobs**[2]

1 Unpublished Data. TA, 2015.

2 Aspirational targets subject to all projects in Appendix 2 being implemented.

In the context of this Strategy, the vision has been derived from extant documentation as well as interviews and workshops with key stakeholders from across the region. The vision is, by nature, aspirational, and represents a broad consensus on the overall direction of tourism economic development across the Peel region in the decades ahead. The vision for tourism economic development in the Peel Region is:

> *"By 2020 Peel will have leveraged natural assets and multiplied the region's tourism capacity and visitation as a soft and hard adventure destination. This will make the Peel a truly year-round sustainable and attractive place to invest and visit with quality tourism enterprises, staff and standards across the region."*

The vision aligns with the Tourism Excellence theme in the Blueprint to develop 'a network of adventures that attracts visitors and enables them to engage with the Peel's natural and built attractions in a sustainable manner'[3]. The vision also aligns with MAPTO's vision 'to be recognised as the premier soft adventure destination in Western Australia, for both domestic and international visitation'[4].

The Strategy provides a 'pipeline' of infrastructure investment priorities that will be integral in establishing Peel as the leading destination for year-round *Anytime Adventures*. The purpose of the Strategy is to direct regional effort by identifying development and investment priorities to facilitate a dynamic tourism sector. This reinforces the Tourism Excellence theme of the Blueprint. Tourism is an important pillar of the Peel economy and, as such, a long-term development plan is required to identify where enabling infrastructure could be established at priority locations that will deliver sustainable, region-wide benefits to Peel's economy.

The regional 'insight' of the PDC, MAPTO, Peel CCI, PRLF[5], RDA Peel, Department of Sport and Recreation, DPaW and the five LGAs within Peel provides a deep bank of knowledge and capacity from which to successfully implement Peel's Tourism and Economic Development Infrastructure Strategy during 2016 to 2020.

The vision for the Peel region as a progressive, prosperous and dynamic region with a culture of care is to be realised through implementation of the Blueprint.

Five themes within the Blueprint are pivotal to Peel's future including:

1. **Thriving Industry:** a broadened and diversified industry base to boost the depth and breadth of jobs and occupations across the region.
2. **Agriculture and Food Innovation:** increased economic expansion, market base and international competitiveness of the region's agribusiness sector through innovation in production methods and renewable water and energy supplies.
3. **Tourism Excellence:** a network of adventures that attract visitors and enable them to engage with Peel's natural and built attractions in a sustainable manner.
4. **Capable People:** the availability of an educated and highly skilled workforce with the capacity and capability to flexibly respond to workforce requirements for the future.
5. **Strong and Resilient Communities:** creation of support services and infrastructure that will ensure the community is strong and resilient and able to increase its participation in, and contribution to, the future development of Peel.

3 *Peel Regional Investment Blueprint*. PDC, 2015, p.15

4 Tourism Strategy. MAPTO, 2014.

5 The PRLF is an incorporated association made up of Peel Region Local governments and regional bodies that looks to provide leadership and facilitate development in the Peel region. Shire Presidents and CEOs are among the members appointed under the PRLF constitution.

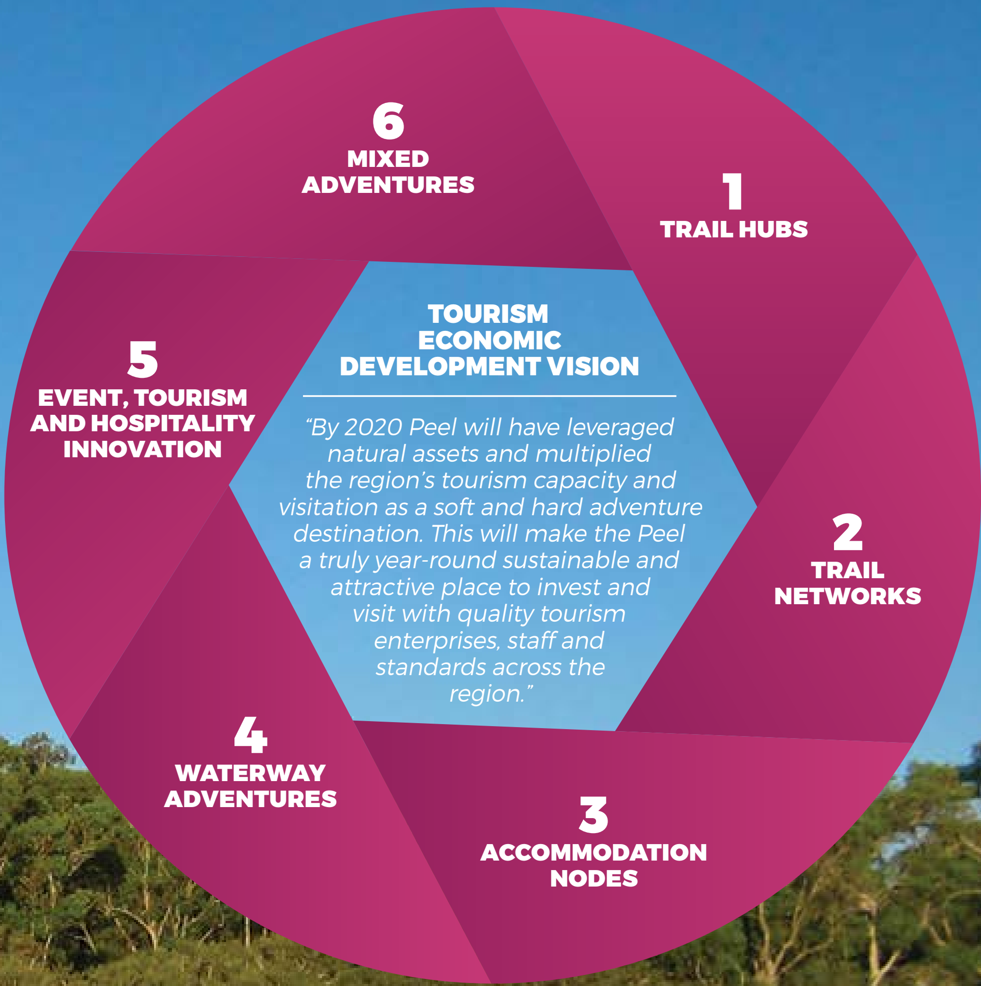

Figure 1. Peel's tourism economic development vision and infrastructure themes

The region is branded as the destination for *Anytime Adventures* and promoted as *Peel a Natural Adventure*[6]. This draws upon its waterways, conservation estate, beaches and many outdoor locations appealing year round to visitor's young and old seeking soft and hard adventures. The majority of Peel's tourism infrastructure is centred in the CoM and urbanised areas of the Shire of Murray, in particular Fairbridge, Pinjarra and Dwellingup. There is still untapped potential across all of the localities in the Peel with potential initiatives identified in this Strategy, when implemented, will go some way towards addressing this deficit in tourism infrastructure. Strengthening Peel's capacity to deliver *Anytime Adventures* requires leveraging Peel's transport infrastructure and natural assets to disperse visitors more widely across the region to trail hubs and networks, accommodation nodes, adventure 'hotspots', operator sites and events. The challenge is facilitating the development of tourism infrastructure that matches the 'trends' that are inspiring and motivating visitors and target markets (e.g. currently mountain biking, camping, 4WDing, fishing, boating and food-wine).

The Strategy provides a framework to 'regionalise' the development and growth of tourism across Peel through collaborative and cooperative approaches which uses the collective capacity of the region's tourism stakeholders, with a focus on infrastructure development, marketing, training and enterprise development. A range of initiatives has been identified for implementation during 2016–20. These infrastructure projects have been evaluated and 'grouped' into six Themes representing over forty investment opportunities (i.e. transformational projects — see Appendix 2) with potential to significantly improve Peel's *Anytime Adventures* capacity and competitiveness and address the identified gaps and opportunities.

6 The PRLF developed a branded signage system — *Peel a Natural Adventure* — to define the boundaries and support the collective branding of the Peel Region. The large billboards are strategically placed along transport corridors.

INTRODUCTION

In 2015 the PDC in collaboration with its stakeholders[7] acknowledged a high priority for the region was a tourism and economic infrastructure development strategy aligned to the (Blueprint). The Strategy provides for regional co-ordination and investment in regional enabling tourism infrastructure.

The strategy focusses upon the 2016 to 2020 timeframe which aligns with the State Government Strategy for Tourism in Western Australia 2020 and provides direction in the short to medium term towards achieving the Blueprint objectives out to 2050.

By 2050, Peel is expected to be one of the most populated regions outside of Perth with a projected population in excess of 444,000[8]. To support a population of this size, the Peel needs to build an economy that fosters sustainable industries, supports an innovative approach to business and employment creation, has a highly skilled and high performing workforce and has effective programs managing the national parks, waterways, nature reserves and natural environment across Peel[9]. With a growing population and economy, the Peel's tourism sector has the opportunity to deliver a stronger economic outcome through the development of the *transformational* tourism infrastructure priorities.

Among the drivers of tourism in Western Australia is the 'great outdoors', which is the focus of Tourism WA's 'Experience Extraordinary' and Experience Perth's branding and promotion. These highly targeted marketing campaigns are appealing to intrastate, interstate and overseas 'experience seekers' placing the emphasis on active and passive adventures, Aboriginal tourism, event tourism, food-wine and hospitality, and nature-based tourism. With high-growth population centres in close proximity to Peel, and gifted with world-class aquatic and terrestrial playgrounds, Peel is well placed to benefit from the State Government's tourism marketing campaigns.

Peel can also benefit from broader societal trends impacting how we travel, such as portable 'smart' devices, Australia's ageing population and growth in 'grey nomad' travellers, 'green' and sustainable living influencing eco-travel, the sharing economy, and the growth in Asia's holiday makers. The aim of future investment guided by the Strategy is to significantly strengthen the competitiveness of Peel as a leading daytrip and overnight destination by leveraging Peel's world-class arterial-transport infrastructure, national parks and conservation areas, waterways and natural resources by increasing its capacity to deliver year-round adventure activities across the region.

7 PDC, TWA, MAPTO, Peel Tourism, CoM, Shires of Murray, Serpentine/Jarrahdale, Waroona and Shire of Boddington, RDA – Peel, DPaW, and Department of Sport and Recreation.

8 *Perth and Peel@3.5 Million*. WA Planning Commission. May 2015

9 For further detail refer to *Perth and Peel Green Growth Plan for 3.5 Million*. December 2015, WA Department of Premier & Cabinet.

The CoM and the Shires of Murray, Serpentine-Jarrahdale, Boddington and Waroona form the Peel region, which is a short drive or train ride from Perth and its growing population. Indeed, Perth and Peel combined is forecast to have 3.5 million residents by 2050[10]. Currently, Peel is home to 128,798 residents[11]. During 2015, Peel hosted 3.052 million visitors including 2.47 million daytrip visitors and 576,314 overnight visitors spending an estimated $527 million[12].

The Blueprint's 2050 goal for tourism is for *Peel's tourism industry and related businesses will be diverse, competitive and sustainable creating economic growth and jobs through high value products and services.* This is to be achieved by focusing on the Blueprint's *Tourism Excellence* theme, which adopts two objectives, each with respective strategies, as outlined below:

1. Grow the Peel Tourism Economy through infrastructure development and product diversification,

- Align key outcomes within the State Government Strategy for Tourism in Western Australia 2020 including brand, regional travel, business travel, events, aboriginal experiences and infrastructure.
- Facilitate communication between stakeholders to develop and implement a *Strategy* to provide pathways and a pipeline of investment opportunities in critical infrastructure that delivers the adventure experience, attracts visitors from the key source market of Perth and expands visitor markets to grow interstate and international visitation.
- Work with Indigenous groups and key stakeholders to develop a Peel Indigenous Tourism Economic Development Strategy to ensure increased participation by Indigenous Australians in mainstream and cultural tourism opportunities.
- Work closely with all levels of government and private agencies to ensure tourism investment is consistent with community expectations; that planning, development and implementation are responsive and timely; and identified strategic priorities will result in new attractions being established.
- Secure a significant built tourism attraction to act as a catalyst for driving visitation.
- Through the Peel Workforce Development Alliance drive employment and training opportunities through the establishment of a Hospitality, Tourism and Events Training Centre.

2. Create a network of adventures which attracts visitors and extends their stay.

- Develop strategies to attract investment in revitalisation projects for towns across the region and grow the cross-regional brand.
- Attract investment for the promotion of activities and events which attract people to our region.
- Promote food and wine tourism opportunities that are accompanied by standards of excellence in hospitality, food and beverage.
- Support local businesses to develop tourism education activities as a complementary component of existing businesses.
- Improve the distribution of tourism information on the region via Smartphone and web-based applications.
- Drive the annual and on-going hosting of major outdoor events (sporting, recreational and cultural) showcasing the outdoor environment and play host to at least three sporting or similar events with a national or international profile.
- Implement the *Strategy* to provide for pathways and a pipeline of investment opportunities in critical enabling infrastructure that promotes the improved and developed profile of experiences across the region.
- Support the Peel Arts and Culture Trail project to further tourism development in this industry sector.

The aspirational targets of the Blueprint's *Tourism Excellence* theme are:

- By 2050, the Peel tourism economy is tripled.
- By 2050, domestic visitor length of stay has doubled.
- By 2050, the number of significant events in the region has grown to 12 per year.

10 *Perth and Peel@3.5 Million* (WAPC 2015)

11 *Catalogue 3235.0 — Population by Age and Sex, Regions of Western Australia, 2014*, ABS.

12 TRA 2016 (unpublished data). Expenditure estimates by Marketrade using State-based 2014–15 averages.

PEEL Development Commission

TOURISM EXCELLENCE

METHODOLOGY

The Strategy has been developed by adopting the following logical processes:

- **Stage 1:** Desktop review of relevant Regional and State strategic policies, plans and market research (please refer to Appendix 3).

- **Stage 2:** SWOT and GAP analysis and desktop audit of the five-A's of tourism[13].

- **Stage 3:** Peel infrastructure initiatives development.

13 The five-A's of tourism include accommodation, access, amenities, activities and attractions.

Stage 1: Desktop review

Key findings from the desktop review and extensive engagement with stakeholders, are summarised below:

- The Blueprint provides the over-arching direction for the development of public tourism infrastructure across the Peel, with 'hard' and 'soft' adventure providing the focus for tourism development.
- MAPTO's vision for tourism in Peel is: *to be recognised as the premier soft adventure destination in Western Australia, for both domestic and international visitation.*
- Peel offers a wide range of outdoor activities that have an 'adventurous' component. Priorities identified by stakeholders include 'soft' adventure such as arts, culture, environment, heritage and food and 'hard' adventure such as canoeing, mountain biking, hiking, 4WD'ing, fishing, crabbing, boating and skydiving.
- MAPTO's tourism's positioning is *"A destination to escape the daily routine, to refresh body and mind and to live the moment by experiencing something adventurous and new in a natural environment"*. The priority is on natural settings where visitors can indulge in nature and adventure.
- MAPTO identified that visitors to Peel are increasingly seeking new and enriching 'adventure' experiences, a more diverse choice of locations, natural environments and outdoor activities[14]. A wider choice will allow for impromptu, spontaneous visitation, potentially without planning and unaffected by seasonal constraints.
- Priorities identified by stakeholders include leveraging national parks, nature reserves, waterways, foreshores and natural settings to increase the options available to visitors and to grow visitation and extend length of stay.
- Peel tourism requires a stronger trail focus, immersing visitors in nature based settings, including new trails and extensions to trails that connect existing trails with towns and hubs, trail amenities, drive trails and trail upgrades. A priority is to disperse visitors along existing (arterial) corridors to hubs where visitors gather to access and enjoy a variety of trail and adventure experiences.

- Recognised hubs becoming destinations where visitors park, gather, plan and commence their *Anytime Adventures* having the benefit of receiving up-to-date information, suitable provisions and preparedness to enjoy adventure experiences including trails, waterways and natural settings. Hubs becoming the gateway to adventuring in the Peel region.
- Upgrades to multi-faceted transport systems, utilities and services infrastructure that enables expansion of accommodation capacity along with new and upgraded accommodation options in proximity to visitor hubs and trail networks will encourage increased visitation and extended length of stay.

14 *Tourism Strategy*, MAPTO, 2014

Western Australian tourism

Tourism WA's 2020 Strategy[15] sets an aspirational goal to double the value of tourism in Western Australia from $6 billion in 2010 to $12 billion by 2020. For the year ending December 2015, WA had an estimated visitor spend of around $7.2 billion from 9.3 million visitors and 69.9 million nights[16] and economic indicators suggest a more favourable climate for tourism in the short to medium term. Over the last two years (2014 and 2015) the top five areas visited in WA were Perth, Busselton, Augusta-Margaret River, Mandurah and Albany. These areas are expected to continue to play an important role in growing tourism in Western Australia. WA's 2020 Tourism Strategy focuses on branding (i.e. *Experience Extraordinary*), infrastructure, business travel, Asian markets, events, regional travel and indigenous tourism. Initiatives to grow tourism across regional WA include a focus on caravan and camping, food and wine, Aboriginal tourism, Parks for People (national parks), cruise shipping and events. Where complementary, a number of these themes are captured in the Strategy.

Trends and driving forces

Trends influencing tourism in Peel over the medium term include[17]:

- WA's international markets: Steady growth in visitation from Asian visitors (e.g. China and South East Asia), Europe and United Kingdom visitors including self-drive family groups, Experience Seekers and Backpackers (e.g. working holiday makers).
- Australia's ageing population: Over 65's increasing from 3.5 million in 2015 to 5.3million in 2028 (i.e. 51% increase in 13 years)[18]. Many will be expected to be comparatively healthier, wealthier and more active. Many are also anticipated to be travelling in caravans/campers/motorhomes and interested in heritage, art-culture, nature-based experiences and hospitality.
- Sharing economy (Uber, Airbnb etc.): Steady increase in residents and visitors sharing accommodation, rooms, cars, bicycles, etc. This is partially fuelled by social media, mobile communication and green/sustainable approaches to life.
- Technology: Smart devices and the 'internet of things' becoming mainstream, with visitors making bookings, way-finding, sharing experiences, reviewing sites/places and monitoring media 24/7. GPS and near-field communication becoming more widespread and effective in informing and dispersing visitors across destinations.
- Events, friends and relatives: This source of tourism visitation continues to grow and will be sustained into the future particular with more events on the calendar. A strong market for this type of tourism exists notably when empty holiday homes are widely used particularly when events are in place and/or school holidays.
- Green and sustainable living: Amidst climate change, there's a growing focus on biodiversity, nature, conservation and local communities participating in and benefiting from eco-tourism.
- Rising popularity of outdoor recreation activities including mountain biking, road cycling, canoeing/paddling and camping. This is coupled with a rising popularity of outdoor events such as adventure races, great walks, bike challenges etc.
- *Perth and Peel Green Growth Plan for 3.5 million*[19] proposing stronger conservation programs, expansion of national parks and nature reserves. There is a strong emphasis on Peel Regional Park, Peel and Harvey estuary, catchments and the biodiversity of natural environs across Perth and Peel[20].

Despite the positive outlook for tourism in WA, there are a number of internal and external risks to which it is exposed. Risks inherent to Western Australia's tourism industry, and the mitigation methods available within WA's tourism economy, influences how the sector will achieve its strategic goals and are specified in Table 1.

15 State Government Strategy for Tourism in Western Australia 2020, Government of Western Australia, 2010

16 *Fast Facts Year Ending December 2015*, TWA, Mach 2016.

17 Trends collated from TA, TRA, Tourism WA, ABS, Roy Morgan Research, WA Planning Commission, World Tourism Organisation and CMCA.

18 ABS 3222.0 Population Projections, Australia. Time Series

19 *Perth & Peel Green Growth Plan for 3.5 Million*, December 2015, WAPC

20 *Perth & Peel Green Growth Plan for 3.5 million*, December 2015, WAPC.

Table 1. WA tourism risk and mitigation

Risk	Mitigation
Fluctuations in the Australian Dollar	• Domestic and local market focus. • Business-corporate market focus. • Improved standards and quality to increase value.
Fluctuations in domestic employment, household disposable income and holiday-leisure budgets	• Focus on high yield visitors. • Value-based 'budget' products and services. • Business structured to scale up-down as required.
Unskilled and transient tourism workforce	• Use casual employees & working holiday-makers. • Family enterprises and family as employees. • Invest in training, staff development and IT. • Grow the workforce across the region through place based accreditation training programs as provided through TCWA
Seasonality of tourism sector.	• Seasonal scale-down. • Counter-seasonal focus on business-corporate followed by holiday-leisure visitors in peak periods. • Extend peak & shoulder periods.
Capacity constraints at emerging sites and/or sites with increasing popularity.	• Investment in tourism infrastructure such as access, amenities and services/utilities. • Regulation of access and/or visitation. • Introduce user pays fees and charges.
Adverse impact upon sites, routes or areas.	• Restrict-control access and/or activities. • Rehabilitation and conservation initiatives. • Introduce guided tours or user pays fees. • Change land planning/land use categories.
Natural disasters, extreme events and unforeseen circumstances.	• Insurance policies to suit repatriation, repair, replacement, re-scheduling, re-routing, etc. • Appropriate planning and budgeting (e.g. evacuation, safety, crisis, etc.). • Alternative approaches identified to service and/or accommodate guests and visitors.
Demand explosion. Excessive or unruly visitation.	• Contingencies such as overflow areas, alternative access-routes, at-call volunteers & contractors, etc. • Public assistance such as SES, Police, volunteers, media and authorities. • Partnerships and Alliances that can assist.
Safety and Well-being of visitors and guests.	• Insurance policies (public liability, accident, etc.). • Contracts and Disclaimers signed by visitors. • Visitor induction and safety programs. • Signs, instructions and adequate resourcing. • Quality procedures and best practice standards.

Source: Maketrade

Peel tourism competitors

Peel competes for daytrip and overnight visitors with short and medium haul destinations. A strong point of difference for Peel are the waterways (Peel and Harvey Estuary; Murray and Serpentine Rivers), national parks (Serpentine, Yalgorup) and Conservation Reserves (Lane Poole in particular) and rivers (Murray, Serpentine and Harvey), which provide for broad appeal to visitors seeking outdoor adventure, nature and marine experiences.

Relative to Peel's potential tourism capacity, the region is at a 'development-consolidation' stage in the tourism lifecycle[21]. Improving Peel's competitiveness requires an increase in capacity to deliver more strongly on the brand promise of *Anytime Adventures* and the PRLF branded signage system — *Peel a Natural Adventure*. This should be through investment in infrastructure that leverages Peel's unique natural assets (i.e. competitive advantages) that stimulate investment and growth in tourism products and services.

Existing arterial and transport infrastructure can also be leveraged in creating prominent hubs across the Peel region where high quality soft and hard adventure experiences can be enjoyed, improving Peel's competitiveness among daytrip (short haul) and overnight (medium haul) destinations. A profile of Peel relative to its competitors is shown in Table 2.

Table 2. Profile of Peel and competing destinations

Destination	Attributes and appeal
Short haul	
Perth	Hospitality, Entertainment, Shopping, Beaches-Waterways, Wineries, Heritage, Adventure and Nature
Swan Valley	Hospitality, Wineries, Heritage
Lancelin/Moore River	Beaches, Waterways, Nature
York/Beverley	Hospitality, Heritage, Nature
Rottnest	Beaches, Nature, Heritage, Hospitality
Peel	Beaches, Waterways, Heritage, Hospitality, Nature and Adventure
Medium haul	
Margaret River	Wineries, Hospitality, Nature, Adventure, Culture and Heritage
Albany-Denmark	Wineries, Hospitality, Nature and Heritage
Geraldton-Midwest	Beaches, Heritage and Nature
Bunbury region	Wineries, Hospitality, Nature and Heritage
Long haul	
Esperance	Beaches, Adventure and Nature
Kalgoorlie	Nature and Heritage
Shark Bay	Beaches, Nature and Heritage
Exmouth	Beaches, Adventure and Nature

* Travel time by car for Perth residents to access each respective destination as day visitors or overnight visitors.
Source: Maketrade

21 The Tourism Area Life Cycle is a concept used to track the progress of a tourism region as reflected by the number of visitors.

Peel tourism vision and advantage

In the quest to differentiate and compete, the Peel region offers a genuinely wide range of activities[22] that have an 'adventurous' component. Many of which involve the outdoors, natural settings and experiential activities that encourage people to step outside their comfort zones while indulging in self-discovery and authentic experiences. This is reflected in Peel's branding and promotion to position the region as:

> *A destination to escape the daily routine, to refresh body and mind and to live the moment by experiencing something new and adventurous in a natural environment[23].*

This is also captured in MAPTO's tourism vision for Mandurah and Peel, which is:

> *To be recognised as the premier soft adventure destination in Western Australia, for both domestic and international visitation.*

THE VISION FOR TOURISM ECONOMIC DEVELOPMENT IN PEEL IS:

By 2020 Peel will have leveraged natural assets and multiplied the region's tourism capacity and visitation as a soft and hard adventure destination. This will make the Peel a truly year-round sustainable and attractive place to invest and visit with quality tourism enterprises, staff and standards across the region.

The strategic objective is to increase year-round tourism visitation and expenditure — both daytrips and overnight visitors — in line with Tourism WA's goal to double tourism expenditure in WA to $12 billion p.a. by 2020 and in line with the objectives of the Blueprint's *Tourism Excellence* aspirations. In order to achieve this, the Strategy encourages the development of both 'hard' (built) and 'soft' (information) infrastructure based on priority projects that leverage natural attractions and arterial transport including rail infrastructure.

The Strategy also encourages the continuation of tourism training and employment programs initiated by the PDC, MAPTO, the LGAs and NGO as well as initiatives that grow investment into Peel's tourism sector and/or results in new tourism ventures that increase employment within the tourism sector.

The objective of the Strategy is to increase tourism investment and visitation such that in 2020 Peel Tourism attains:

- 690,500 domestic overnight visitors (26% increase on 2015).
- 39,150 international visitors (38% increase on 2015).
- 3.23 million daytrip visitors (31% increase on 2015), and
- $774 million visitor expenditure (47% increase on 2015).

The time frame for these objectives aligns with Australia's National Tourism Strategy *2020 Tourism Industry Potential* and Tourism WA's *Strategy for Tourism in WA 2020* and reflects *Peel Regional Blueprint* aspirations to 'grow the Peel tourism economy' and 'create a network of adventures'.

The Strategy adopts visitor and expenditure 'targets' that are over and above the forecasted trend for 2016–20 reported by the Commonwealth Government's Tourism Forecasting Council. The aspirational targets are premised on achieving short-medium term investment in the recommended 'transformational' infrastructure, which is expected to significantly grow visitation and expand the Peel tourism economy. The targets (dashed lines) and forecast trends (solid lines) are shown in Figure 2.

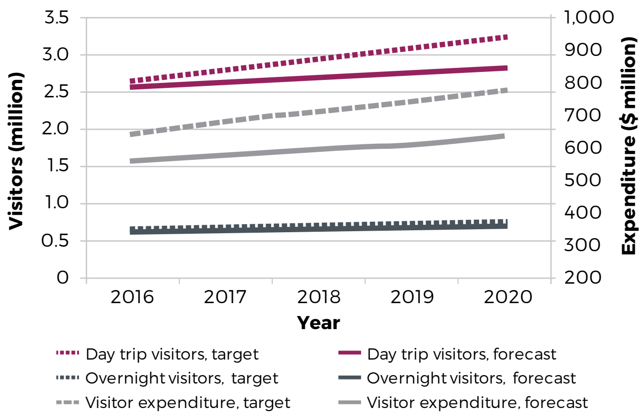

Figure 2. Peel visitor and expenditure projections 2016–20
Source: Marketrade 2016

22 Including boating, jet skiing, sky diving, sailing, surfing, fishing, bush walking, wildlife watching (e.g. birds and dolphins), white water rafting, mountain biking, hiking, 4WD'ing, horse riding, kite surfing, camping, trail bike riding, supping, scuba diving and snorkelling, swimming, golf, road cycling and windsurfing. Adapted from *MAPTO Mandurah and Peel Tourism Strategy 2013.*

23 As per the *Mandurah and Peel Tourism Strategy 2013*, which underlies the branding and positioning of Peel as a premier tourism destination.

Peel tourism competitive advantages

Peel tourism's competitive advantages include the following:

- Close proximity to Perth, with its growing resident and visitor population and gateway access for overseas and interstate visitors through port and airport facilities;
- Comparatively short and economical travel time to experience the many adventurous offerings across the Peel region;
- Transport infrastructure linking Perth and the southern regions to Peel, including via train, car, bus-coach and boat;
- Wide selection of 'things to do in all seasons', including soft and hard adventure;
- Range of sites with recognised biodiversity value including Ramsar wetlands, conservation estate (i.e. national parks) and areas of undisturbed natural beauty (forests, beaches, lakes, rivers and bushland); and
- Offering adventurous opportunities spontaneously, without need for critical pre-planning, with many places-destinations having neighbouring attractions and experiences close-by.

These competitive advantages are the fundamental difference making Peel a truly year round *Anytime Adventures* destination where visitors can enjoy inland adventures in cooler months and coastal adventures in warmer months. Many competing destinations are challenged by relatively short visitor seasons due mostly to climatic conditions and geographical settings.

Regionally significant (popular) attractions and activities are centred on Dwellingup , Serpentine (National Park), Peel and Harvey Inlets, Murray River, Mandurah and coastal beaches. Further Investment in tourism infrastructure and public transport options in and around the towns of Boddington, Dwellingup, Pinjarra, Jarrahdale and Waroona would stimulate tourism across areas of Peel's inland region that are currently lesser developed but have considerable tourism potential.

Investment that enhances Peel's inland and coastal destinations that improved the range, quality and interconnectedness of *Anytime Adventure* experiences would help grow visitation during the warmer and cooler periods, for example:

- Through improved amenities at recommended hubs (e.g. Dwellingup, Jarrahdale & Boddington),
- Through improved public transport facilities and options to/from, hubs and trails (e.g. bus, drive & park, bike, walk/hike & hires),
- Through improved connectivity between hubs (e.g. drive routes, packaged experiences, themed events & bus services)

Table 3 summarises examples of Peel's existing approach across tourism types and potential strategic development options. Approaches in tourism types with high enabling potential are priorities within the Strategy.

Table 3. Peel tourism options

Tourism type and enabling potential*	Peel's existing approaches	Peel's future tourism options
Marine (high enabling potential)	Jet Ski, Stand-up Paddle Board/Kayak, Houseboat, Fishing, Crabbing, Surfing, kite boarding, diving/snorkelling, sailing, boating.	Upgraded/additional boat ramps, moorings and jetties, improved access and parking and anchoring, toilets and amenities (including refuelling; sullage).
Experiential and adventure tourism (high enabling potential)	Mountain Biking, 4WD'ing, Skydiving, Houseboats, Wineries, camping.	Adventure-based events, dedicated hubs linked to trails and amenities, sites for 'pop-up' operators to trade, increased range of camping and budget and RV accommodation, pick-up/drop-off services and sites, recreation aviation, aviation training and accreditation.
Eco-tourism (high enabling potential)	Dolphin tours, Serpentine Falls, Peel Zoo, Crabbing tours, National Park walk trails and picnic areas.	Increased/improved access, guided and self-guided tours and trails, lookouts and vantage points, camping and day use sites, fish restocking and habitat programs, wildlife conservation volume-tourism programs, short walks and hides and shade shelters at biodiversity hotspots.
Agricultural tourism (moderate-high enabling potential)	Farmers markets, Producer outlets, Marron farm, Wineries with cellar doors, food-wine drive trail, hospitality venues with local produce on offer.	Indoor market/fair venue, culinary drive trails, themed daytrip itineraries, branded signage at producer sites, regional culinary branding and promotion and signage.
Environmental (moderate enabling potential)	Wetlands (RAMSAR), Bird watching, Wildflowers, Thrombolites, Dolphins.	Boardwalks, trails, vantage points, improved access, volun-tourism programs, Ramsar — Biodiversity Hotspot trails and drives, interpretive panels/displays at high value sites, and glamping in nature-rich areas.
Indigenous (low-moderate enabling potential)	Memorials, interpretive walks.	Bush tucker gardens and guided tours, cultural talks and walks, art-craft and tool-making workshops, bush tucker meals, camping with custodians, guided drive tours, mentoring Aboriginal operators.
Business, corporate, industrial and education (low-moderate enabling potential)	Conferences and events, Mandurah Performing Arts Centre, high end accommodation for group bookings, golf clubs, hospitality venues, events, Boddington Gold Mine.	Dedicated conference-business event venue; business event packages and promotional campaign; PCB alliance and events development program.
Heritage, arts and culture (low enabling potential)	Heritage trails, Antique/Curios Shops, Museums and interpretation centres, Settler Cottages and interpretive panels.	Themed drive trails (with signage and marketing collateral), Art and Culture trails in localities and cross regionally linked, upgraded sites (interpretation, parking, signage, access), themed half/full day itineraries, improved access to sites.

* "Enabling Potential" refers to the opportunity & growth prospect that each type of tourism has within Peel, based on the region's stock of natural & built features, its branding & positioning, and Peel's proximity to the large & growing visitor population in Perth & surrounding areas.

Source: Marketrade

Stage 2: SWOT and gap analysis

SWOT analysis

Potential gaps in Peel tourism along with strengths, weaknesses, opportunities and threats (Table 4) were identified from a review of documentation and findings from stakeholder consultation.

Table 4. SWOT analysis

Strengths	Weaknesses
• Strong and diverse natural resource base which holds significant opportunities in experiential and environmental tourism. • Strong branding and destination management initiatives via PRLF, MAPTO, Peel CCI and LGAs. • Established events calendar with strong local support. • Excellent facilities for leisure and arts events. • Growing regional population enabling economies of scale, improved commercial viability and increased local investment. • High quality road, rail and marine infrastructure linked to operators, popular sites and towns. • 50+ years as a holiday destination; well worn paths to popular inland and coastal sites. • Primarily a day-trip destination not greatly affected by fluctuation in fuel costs. • Ramsar listed waterways, Peel & Harvey estuaries.	• Mandurah an ex-tourism destination now regarded as an outer suburb of Perth. • Uniqueness of the destination is promoted via the *Anytime Adventures* branding but is not well established across all market segments. • No systemized gathering and reporting of local data/metrics to gauge Peel tourism growth and trends. • Limited engagement between Peel's tourism sector (employers) and education and training providers. • Inclusion with Experience Perth tourism region delivers limited benefits to Peel vis-a-vis destinations such as Swan Valley, Rottnest, Fremantle or Perth. • Poor public transport access across the region and between localities. • Reluctance to grow short stay accommodation opportunities.
Opportunities	**Threats**
• Align event theming with destination image (i.e. adventure, marine and eco-tourism). • Proximity to the Perth metropolitan area with good connectivity, which presents a large and accessible visitor market. • Developing a 'draw card' marine tourism attraction near Mandurah foreshore. • Upgrade and link drive, cycle, equine, hiking and kayaking trails throughout the Region (i.e. an interconnected trail network). • Developing a specialty in hosting medium sized business events (e.g. 200–400 PAX) packaged with nature and adventure activities. • Spatial planning of tourism development that stimulates focal areas/hubs, enterprise clusters and a concentration of visitors and operators. • Public transport focussed initiative and travel packages building upon close proximity to Perth, domestic and international air services.	• Intrastate competition for Business Events especially between towns/facilities across regional WA. • Comparative affordability of overseas destinations (especially when the Australian dollar is high). • Climate change impacting coastal areas (e.g. sea-level rise) and extreme weather events (e.g. flooding, thunderstorms-fire, storms and tidal surge). • Static or declining visitor levels unable to support growth in tourism products and services. • Local issues such as mosquitoes, algal-affected waterways, dieback, bushfire or acid sulphate soils, and mining in the Jarrah forest impacting the region's appeal and/or visitation. • Impediments and regulations affecting the adventure tourism industry (e.g. insurance, litigation, injury, accreditation, compliance, permits and licenses, safety and crisis plans, OHS, etc.).

Source: Maketrade

Gap analysis

A review of recent LGA plans and strategies highlighted the following issues in respect to tourism infrastructure and amenities:

- **Shire of Murray:** Structured day activities. Winter facilities (shelters). Riverfront Park and playground area. Public transport accepting carry-on bikes. Short stay, Budget and Backpacker Accommodation. Riverfront accommodation. Guided river tours. Houseboat mooring and jetty facilities. Conference facility. Multi-purpose outdoor events venue (Pinjarra).
- **Shire of Boddington:** Visitor/Interpretive Centre. Town Centre activation. 4WD Park and Training Facility. Agri-food tourism initiatives (drive trail, markets, co-operative retail outlet). Short stay caravan and camping facilities. Backpacker and budget accommodation. Trail/rail linkages to other localities. Foreshore playground and family day-use amenities.
- **CoM:** Eco and nature-based facilities (hides, lookouts, boardwalks, habitats, trails, feral-free areas, nurseries, etc.). Hospitality, events and tourism training and development options (venues, facilities, operators, programs and facilitators). Business tourism. Food cuisine and fine dining. Public transport linkages (pick-up/drop-off, scooter/car hire, hop on/off mini-bus). Backpacker accommodation. Short stay caravan and camping facilities. Boat moorings, pens, jetties and refuelling facilities. Helicopter pad. Waterfront sites and amenities to host tour operators. Inlet trail loop with connecting trails to surrounding sites.
- **Shire of Serpentine-Jarrahdale:** Develop tourist attractions and accommodation. Develop Jarrahdale Heritage Park. Install information panels on local history and public art at relevant sites. Discovery centres at tourism villages. Annual events for visitors and community. Upgrade and expand trails.
- **Shire of Waroona:** Enhanced protection of wildlife corridors. Enhanced signage to channel visitors along preferred roads and routes. Improved informational and amenities infrastructure at key sites (heritage, trails heads/terminus and day use areas). Venues for arts and culture, suited to visitors and community. A major resort development on the coast. Improved visitor amenities (parking, rest bays, signage, and shade shelters). Sustainable recreation uses of the two dams. Tourism attractions/activities such as walk trails, board walks and interpretive signage.

Desktop review, stakeholder consultations and strategic analysis identified a range of critical gaps in tourism across the Peel region including:

- Aboriginal tourism services and visitor experiences including Indigenous Interpretation/Visitor centre, trails, tours, art/craft and tool workshops, cultural talks and walks, bush tucker tastings, cultural performances and guided 4WD tours.
- Regional themed drive routes/trails with maps, signage, roadside markers, lay-bys and rest areas. Possible themes include food/wine, art and culture, art and craft, heritage, nature (bird watching, wildflowers, and fauna spotting) and biodiversity hotspots.
- Quality low cost short-stay accommodation such as backpackers, small dormitories (4–6 persons), self-contained studios and cabins/chalets in proximity to day use areas.
- Regional hop-on/hop-off bus service for mountain bikers, hikers, daytrippers; connecting with bus and train depots, towns, shopping centres, accommodation sites and popular day use areas.
- Casual use moorings, jetties and mooring poles on Murray River, Harvey Estuary and Peel Inlet. Boat refuelling facilities for public use (i.e. accepting credit card and cash payment options rather than account holder systems only).
- The number of hospitality venues offering quality food and dining experiences promoting local produce, innovative cuisine and high quality of service.

The Strategy aims to address the identified gaps, opportunities and weaknesses through the following initiatives:

- Create stronger tourism/visitor hubs for example at Dwellingup, Boddington, Jarrahdale, Serpentine and Waroona.
- Improve Peel's walk, bike, canoe and nature experiences at sites growing in popularity (e.g. Dwellingup, Serpentine, Peel & Harvey Inlets, Lake Clifton, Yalgorup & Jarrahdale).
- Invest in services infrastructure that enables investment and growth in short stay accommodation capacity (e.g. Jarrahdale, Serpentine, Boddington & Pinjarra).
- Strengthen capacity in marine/aquatic tourism by upgrading infrastructure, amenities and foreshore facilities (e.g. Lakes Navarino & Moyanup, Hotham Weir, Yunderup, Pinjarra Foreshore, Lane Poole & Preston Beach).
- Growing events themed and supportive of *Anytime Adventures* including food and hospitality.

These initiatives are expected to expand tourism enterprise, stimulate employment, grow visitation and expenditure, and consolidate Peel as the leading destination for *Anytime Adventures*.

Peel tourism workforce analysis

The nature of the hospitality and tourism sector is one of constant demand and the sector suffers from significant recruitment and retention difficulties and skills deficiencies. According to the FutureNow Creative and Leisure Industries Training Council Industry Workforce Development Plan there is a recognised vacancy rate of 9 per cent and a turnover rate of 64 per cent in the industry. The Plan lists the top occupations in demand as being kitchen hands, waiters, café and restaurant managers and chefs. Western Australian industry stakeholders list additional shortages in front office receptionists, housekeepers/room attendants and porters/concierges.

There is currently a general shortage of supervisory, management and business skills in the industry, particularly in small to medium enterprises where 64.7 per cent of workers have a level of education attainment of Year 12 or below. The ongoing shortage of supervisory, management and business skills contributes to overall poor service and performance across the industry, making it difficult to provide consistent best practice 'service excellence'.

The diverse nature of the tourism industry's composition in terms of business types and sizes which range from micro enterprises to multi-national brands and businesses in between requires the need for a workforce with diverse and adaptable skills with customer service being at the core of all jobs.

Growth in new tourism infrastructure or new markets will bring demand for workers with particular skills that may be currently lacking in the Peel. There is a need to develop partnerships with industry, government and training providers to develop initiatives which will ensure the future workforce requirements are addressed.

Many employers don't have a plan in place to address talent challenges, as many are small or micro organisations and don't have the capacity to take on that function. Some businesses do not invest in staff up-skilling as it is expensive and risky with the transient nature and high turnover characteristics of the workforce.

Investment in the hospitality and tourism industry to assist operators in overcoming skills shortages is essential to ensuring high quality service delivery to both local and visitor markets.

The proposed Hospitality and Service Industries Training Centre at the Peel Education Campus is expected to increase industry confidence in training and increase the uptake of chef apprentices, hospitality, tourism and personal services workers. The Centre is expected to train 1,172 students in a range of occupations of the first four years of operations.

Programs are required to encourage and facilitate enterprises to increase their own management and supervisory skills and develop plans for the workforce development of their own staff. There is a need to assist local businesses wishing to grow or diversify their business to attract funding to undertake workforce development such as the Industry Skills Fund delivered by Department of Education and Training or the Entrepreneurs' Programme delivered by AusIndustry.

There is also a need to support new enterprises through the business development process through the development and implementation of initiatives specifically for this industry.

Aligned to workforce development is the strong need for businesses in the tourism industry to invest in Accreditation as a tourism ready businesses. The Australian Tourism Accreditation Program (ATAP) is a national business development program that is suitable for all businesses types and sizes. It provides businesses with the necessary tools and resources to assist and update business policies and procedures to ensure ongoing sustainability and best practice. The Tourism Accreditation 'tick' logo signifies quality assurance and the delivery of quality tourism experiences.

Stage 3: Peel infrastructure initiatives

This strategy focus upon the identification of a pipeline of infrastructure projects 'grouped' into six themes representing over forty investment opportunities with potential to significantly improve Peel's *Anytime Adventures* capacity and competitiveness by addressing the identified gaps and opportunities.

This information resulted from:

- Face to face and phone consultations with 65 stakeholders across the Peel Region (see Appendix 4).
- Modelling of 60 potential tourism investment opportunities identified in consultations (see Appendix 2).
- Economic impact analysis of potential investment opportunities using REMPLAN economic modelling.
- Five workshops facilitated in Mandurah, Pinjarra, Waroona, Dwellingup and Jarrahdale to review recommended potential investment opportunities, investment projects, themes and Peel's tourism vision.
- Prioritisation of investment themes in consultation with the Project Steering Committee and the PDC Board.

The recommended tourism infrastructure investment priorities for Peel during 2016–20 are as outlined in Table 5.

The projects are mostly in a preliminary planning stage, costs are indicative, and development issues such as land title, heritage, flora/fauna, access, utilities, mining and approvals/licenses require further investigation.

Table 5. Peel tourism infrastructure themes, strategies and initiatives

Themes					
1	2	3	4	5	6
Trail hubs	**Trail networks**	**Accommodation nodes**	**Waterway adventures**	**Event, tourism and hospitality innovation**	**Mixed adventures**

Strategies	Potential initiatives
Develop a stronger trail focus, immersing visitors in natural settings, including new trails, extensions and upgrades to existing trails and providing connections to amenities in towns and hubs.	Dwellingup, Hotham River Precinct Boddington; Jarrahdale, Lake Clifton and at selected adventure-driven and ecotourism visitor precincts. Hub/visitor centre, toilets / showers, laundry, shade shelters, parking, trail links, signage, Wi-Fi, picnic and BBQ area, playground, lighting, water, utilities upgrade.
Investment in infrastructure that: • leverages Peel's unique natural assets that stimulate investment and growth in tourism products and services • increases Peel's capacity to provide visitors an expansive range of year-round aquatic and terrestrial nature-based and adventurous experiences at highly appealing locations during warm and cool seasons • leverages national parks, nature reserves, waterways, foreshores and natural settings to increase the options available to visitors and to grow visitation and extend length of stay • is located in areas which will enhance natural values and environmental restoration areas	Upgrade and integrate drive, cycle, equine, walk/hiking/running, canoeing, bird watching, cultural, historical, art trails through the region as interconnected trails networks and hubs. Festivals and events, sport and recreation challenges/triathlons, equestrian, food innovation hub, food and wine, business and conference tourism. Improve accessibility to conservation areas and facilitate tourism ventures based on nature appreciation and wildlife observation.
Investment in tourism infrastructure in and around Peel towns.	Investment in Boddington, Pinjarra, Jarrahdale and Waroona would stimulate tourism across areas of Peel's inland region that are currently lesser developed but have considerable tourism potential. Develop and invest in town based revitalisation programs which include private sector investment to encourage and retain visitation opportunities. Provide walking trails in and around towns for short stay visitors that link Indigenous, built and environmental landmarks. Provide and invest in town based information and interpretative signage identifying areas of interest.
Invest in services infrastructure that enables investment and growth in short stay accommodation capacity.	Backpackers, homestay or farm stay, Bed and Breakfast, Caravan parks accommodation including camping, glamping, park cabins, RV bays.
Strengthen capacity in marine/aquatic tourism.	Upgrading infrastructure, amenities and foreshore facilities for all ages and abilities. Developing drawcard marine tourism attractions near Mandurah foreshore including a dolphin discovery centre, Peel Waterways Institute, marine theme park. Houseboat and pleasure craft moorings for overnight and day use, boat launch and retrieval points/ramps, marinas and non-powered vessel areas.

Themes					
1	2	3	4	5	6
Trail hubs	**Trail networks**	**Accommodation nodes**	**Waterway adventures**	**Event, tourism and hospitality innovation**	**Mixed adventures**

Strategies	Potential initiatives
Growing themed events supportive of Anytime Adventures including food and hospitality.	Festivals, celebrations and events, sport and recreation challenges / triathlons, equestrian, food innovation hub, food and wine, business and conference tourism.
Commission research to develop a regional approach to primary data collection to gauge Peel tourism trends and performance.	Determine the appropriate data required to support economic, social and environmental analysis of tourism impacts on the peel to guide further/future marketing and investment opportunities. Identify infrastructure requirements to support changing trends of visitor types (lone travellers, environmental, business, backpackers etc).
Increase capacity in Mandurah's business event facilities for servicing high yielding seminar/conference delegates.	Invest in marketing, data collection and research to support the economic case for expansion of existing conference/business tourism facilities.
Advocate for and support the development of Indigenous Tourism opportunities and initiatives.	Aboriginal Tourism and Interpretation Centre with associated cultural events, tours and trails. Support and foster growth in new and existing Aboriginal experiences and enterprises. Encourage Aboriginal cultural tours around the Peel Harvey Estuary and Aboriginal sites.

Source: Maketrade

IMPLEMENTATION OVERVIEW

Peel tourism governance

Peel is an amalgam of five LGA's each with respective tourism budgets and marketing approaches. The LGAs have been responsible for visitor servicing, visitor centres, tourism marketing and supporting regional tourism promotion[24]. Traditionally, LGAs have partnered with a range of tourism stakeholders including Chambers of Commerce, tourism operators, regional tourism organisations and media in promoting their towns and region. In 2013, the MAPTO was established as a local tourism organisation dedicated to growing the Peel region as a tourism destination.

MAPTO is an incorporated not-for-profit organisation, governed by an independent board, and funded by local government, grants, and sponsorships. MAPTO's aim is to increase the level of tourism visitation and expenditure throughout the Peel region by focusing on tourism marketing, destination development, planning and policy advice. MAPTO is the driver of Peel's *Anytime Adventures* marketing campaign, supported by the PRLF branded signage *Peel a Natural Adventure*, and aims to position Peel as WA's premier destination for adventures in natural environments. The Peel's LGAs are stakeholders in MAPTO and focus on local tourism opportunities through their respective plans and strategies (e.g. Shire corporate and business plans and community strategies).

'Regionalising' the growth of Peel as a tourism destination is an identified regional priority by the PDC and key stakeholders. This requires effective intra-regional collaboration between MAPTO, Peel CCI, PRLF, the LGAs, tourism operators and Experience Perth. The priority areas for collaborative focus include tourism and enterprise development, land planning, marketing and visitor servicing, product/infrastructure development and sustainability. MAPTO is working towards using efficient economies of scale for regional marketing, visitor servicing and product/infrastructure development.

Implementation of strategies

Through collaborative approaches the strategies seek to 'regionalise' the development and growth of tourism across Peel. The following high-level initiatives represent the framework underlying the implementation of the Strategy during 2016–20. The initiatives are detailed further on the following pages.

- Endorsement, resourcing and implementation of the Strategy;
- Consolidate themed proposals through stakeholder engagement to prepare concepts briefs, feasibility studies and Business Cases;
- Development of tourism infrastructure, product, enterprise, events, partnerships and marketing;
- Government lobbying in respect to funding, land planning, transport and industry development;
- 'Regionalising' tourism marketing (i.e. advertising, promotion, branding, positioning, visitor servicing and tourism data);
- Facilitating regional forums in training and enterprise development, investment promotion, market and economic intelligence and workforce development strategies;
- Facilitating mentoring and leadership programs, apprentice/trainee/cadet programs, work placement strategies and employment development; and
- Support tourism businesses readiness and accreditation.

Implementation of these initiatives requires the input and support of Peel's tourism stakeholders upon endorsing the Strategy (Table 6). Through regional groups such as PRLF, MAPTO and Peel CCI a united, regional approach to promoting awareness of and interest in tourism infrastructure development can be developed. This will target and catalyse opportunities and private sector investment in transport, tours, hospitality, services, accommodation and tourism ventures across Peel.

24 1998–2002 the *Peel Tourism Region* was one of eleven state government funded sub-regional tourism organisations responsible for destination management and marketing, however, in 2002 it was combined with Experience Perth.

Table 6. Implementation and collaboration

Regional stakeholder	Proposed initiatives
PDC	Advocating, promoting and facilitating the implementation of the Strategy; consolidating proposals, supporting business case development and funding applications.
MAPTO	Endorsement and adoption of the Strategy; advocating for planning and development of infrastructure; product development; enterprise; events; marketing and 'regionalising' tourism.
LGAs	Endorsement and adoption of the Strategy; development of infrastructure; regionalising tourism; funding applications; Peel-wide land planning approaches; public forums and events.
Peel CCI	Endorsement and adoption of the Strategy; facilitating regional forums; training and enterprise development programs; investment promotion.
DPaW	Endorsement of the Strategy; development of infrastructure; support business case development; funding attraction and project management.
VCs and CRCs	'Regionalising' tourism (i.e. advertising, promotion, marketing, branding, positioning and governance).
PRLF	Endorsement and adoption of the Strategy; Peel-wide land planning approaches; lobbying funding agencies and governments.
RDA Peel	Endorsement of the Strategy; co-funding of regional priorities; advocating to government.

Source: Marketrade

Peel tourism marketing

The MAPTO Business Plan (2015–18) identifies that the organisation will focus on a diverse range of markets and segments to ensure growth in visitation and expenditure to the Peel; and acknowledges the point of difference of the Peel against its competitors as it offers a wide range of activities that have an adventurous component.

The Goals and Objectives of MAPTO support the direction, vision and focus communicated throughout the *Strategy*, as listed below:

- Increase the level of tourism visitation and length of stay in the region
- Develop and deliver a unified brand position to be embraced by all tourism stakeholders in their marketing and promotion
- Deliver a well-managed and accessible program of destination tourism marketing, both independently and in collaboration with key stakeholders. MAPTO will ensure its Strategy complements the strategic direction of TWA, Experience Perth and the PDC and look to work cohesively with these key partners.
- Provide a professional level of destination development, including the development of key infrastructure assets, attraction of major events and destination planning
- Provide leadership and support for tourism businesses throughout the region
- Increase the number of tourism businesses opening in the region
- Promote the value of tourism and engage the community to improve the awareness and the level of community support towards the social, cultural, environmental and economic benefits of tourism throughout the region
- Create an increase in the number of tourism jobs in the region

Enterprise and workforce development

Economic development within the tourism sector can include the encouragement of new businesses, the growth of existing businesses and the employment and development of staff. The following approaches (Table 7) have potential to encourage enterprise and employment development within Peel's tourism sector whilst addressing gaps identified by stakeholders during consultation.

Table 7. Strategies addressing gaps

Strategies	Potential initiatives
Facilitate enterprise diversification and new enterprise establishment.	• Review and streamline regulations, planning and policies. • Develop a kit for prospective tourism entrepreneurs that helps fast-track the establishment of new tourism enterprises including provision of key local tourism data. • Establish a list of venues, stopovers, day use areas that could potentially host pop-up tourism ventures. • Identify angel investors, mentors and potential business partners.
Establish tourism as an industry of choice for new labour market entrants.	• Create a forum where entrepreneurs, tourism operators and prospective employees can share knowledge, opportunities and advantages of the sector in Peel. • Presentation of key industry information at school events and career expos. • Positive messaging about opportunities in the industry through local media. • Host networking events to connect potential entrants with prospective employers.
Increase the management and supervisory capacity of local enterprise owners.	• Assist local enterprises to attract funding to undertake workforce development. • Liaise with local training providers to attract relevant high level training to the region. • Create a forum where entrepreneurs, tourism operators and prospective employees can share knowledge, opportunities and advantages of the sector in Peel.
Increase the capability of existing and potential staff to ensure quality customer service and the skills required for future enterprise development.	• In conjunction with the Peel Workforce Development Alliance liaise with training providers to ensure a range of training programs to meet current and future industry needs including short courses, traineeships, and accredited training. • Continue to promote the Australian Tourism Accreditation Program delivered through TCWA. • Promote the benefits of workforce development to local enterprises; promote cross culture awareness training.
Conduct a comprehensive training needs analysis for the tourism, hospitality and events sector	• Expand delivery of training in these sectors through infrastructure investment.

Source: Marketrade

Key performance indicators

Regional tourism data from government sources can have limitations for performance monitoring and analysis purposes[25]. Through regional organisations such as PRLF, MAPTO, Peel CCI and LGAs the Peel region can gather and compile local data to monitor the region's tourism 'pulse' and its performance in implementing the Strategy. Public tourism data can be used to supplement locally collected data. The organisations responsible for collecting and compiling the local (Peel) data would be those managing the facilities where the data resides or can be accessed (in the following cases this is denoted in *italics*). Accessing and utilising this data supports demand driven investment in infrastructure.

Local data:

- Track accommodation occupancy across Peel using quarterly pulse surveys[26] of randomly selected businesses identifying occupancy rates in the past quarter and forward bookings in the next quarter. Survey a representative sample of accommodation providers quarterly (i.e. anonymously, in-confidence). *(MAPTO)*
- Analyse statistics from local visitor centres (door counts, phone/email enquiries, merchandise sales) along with event attendances. *(LGAs)*
- Track mobile phone data identifying visitor origins, frequency of visit and length of stay (e.g. gathered from Mandurah Foreshore by the CoM.
- Track quarterly sales of selected service/product providers identifying trends (e.g. service stations, cafe-restaurants, tours, and hires). Survey a representative sample of service/product providers (i.e. anonymously, in-confidence). *(Peel CCI)*
- Gather vehicle counts at popular sites (e.g. boat ramps, car parks, site entry's, camp grounds, nature walks, bike trails). *(LGAs/DPaW)*
- Analyse 'visits' and 'likes' from localised and regional websites and Facebook pages along with the number/value of online bookings at visitpeel.com.au and other localised booking sites. *(MAPTO)*
- Measure economic impact of publicly funded events and festivals *(MAPTO and LGAs)*

Public data:

- Analyse statistics from Experience Perth and MAPTO (TRA/Tourism WA) identifying daytrip visits, overnight visitor numbers (length of stay and nights) and expenditure, updated annually. *(MAPTO)*
- Analyse park visitor statistics from DPaW for Serpentine, Lane Poole and Yalgorup, updated annually. *(MAPTO)*
- Analyse public transport passenger levels (weekends and public holidays; rail and bus/coach) and uptake of local bus transport trials, updated quarterly. *(Public Transport Authority, CoM, Peel CCI and MAPTO)*
- Analyse statistics from TRA for CoM, Shire of Murray, Shire of Serpentine-Jarrahdale, Shire of Boddington and the Shire of Waroona (LGA Profile), updated annually. *(PDC and MAPTO)*

25 TRA is the main source of tourism data in Australia, collecting data on visitor profiles and expenditure. The descriptive data is reported annually via the *IVS* and *NVS*. In regions such as Peel limitations arise in respect to confidence intervals and data reliability, limited descriptors of visitor segments and periodic changes to survey methodologies can affect the comparability of longitudinal data limiting the use for analysis of trends.

26 Questions could include: What was your accommodation occupancy in the last three months? What level of occupancy do you have forward booked over the next three months? (answers indicating a range are acceptable e.g. 45–50%).

APPENDIX 1 PEEL TOURISM STATISTICAL ANALYSIS

Peel visitor markets

In 2015, 81% (2.47 million) of Peel's 3.05 million visitors were daytrip visitors, mostly from Perth and surrounds[27]. Domestic overnight visitors comprised 18% (548,000), again mainly from Perth and surrounds, with international visitors making up one percent (28,314) of visitors[28]. However, although overnight visitors (576,314) comprised 19 percent of all visitors, they accounted for 52 percent of visitor expenditure ($270 million) compared to 48 percent ($257 million) in daytrip expenditure[29]. In total, visitor expenditure in the Peel was an estimated $527 million in 2015[30].

Overnight visitors to Peel are mostly residents from Perth and regional surrounds including those VFR and holiday-makers who typically stay for 2–4 days or up to 10–14 days during school holidays. These accounted for 68 percent of total visitor nights in 2015[31]. Conversely, international visitors are a minority (1%) but stay for longer periods accounting for 17 percent of total visitor nights (Table 8).

Table 8. Visitors to Peel region year ending December 2015^

Peel region	Visitors	Visitors (%)	Nights	% of nights	Average length of stay (nights)	Average daily spend ($)	Estimated total spend ($)
Domestic	548,000	18	1,893,000	83	3.5	125	237,476,850
International	28,314	1	395,348	17	14.0	82	32,418,536
Total	**576,314**		**2,288,348**		**4.0**	**117,943**	**269,895,386**
Daytrip	2,476,000	81				104	257,504,000
Total	**3,052,314**						**527,399,386**

^ TRA 2016 (unpublished data), Peel region and Regional Development Commission Areas Visitation and Expenditure YE Dec 2014. Tourism WA (i.e. expenditures estimates use the reported WA State averages).

Source: TRA 2016 (unpublished data)

27 Unpublished data. TRA. 2016

28 As per the *Mandurah and Peel Tourism Strategy* 2013, which underlies the branding and positioning of Peel as a premier tourism destination. The vision is also consistent with Tourism WA's highly successful 'experience extraordinary' campaign.

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30 REMPLAN Peel Tourism Economy Output 2015.

31 As per the *Mandurah and Peel Tourism Strategy* 2013, which underlies the branding and positioning of Peel as a premier tourism destination. The vision is also consistent with Tourism WA's highly successful 'experience extraordinary' campaign.

A comparison of visitors to Peel in 2006 and 2015 highlights changes in the profile of visitors over a nine-year period as summarised below[32].

- **Domestic visitors:** a substantial increase in visitors "visiting friends and relatives"; a notable increase in visitors "travelling alone"; and a modest increase in visitors "eating/dining out" and "going to the beach".
- **International visitors:** a substantial increase in visitors "visiting friends and relatives"; as well as visitors with origin "Asia"; travel party "adult couple" and "travelling alone"; "female" visitors; and those aged 55+ years.
- **Daytrip visitors:** a substantial increase in visitors "visiting friends and relatives"; "male" visitors; visitors aged 45+ years old; and a modest increase in visitors "eating/dining out", visiting friends and relatives and undertaking "other" activities; and visiting for "business" purposes.

The notable changes across Peel's visitor types include an increase in 'visiting friends and relatives', visitors travelling alone, visitors from Asia, visitors aged 45+ years, and visitors eating/dining and undertaking 'other' activities (Table 9). These trends are expected to continue in the short-medium term (i.e. 2016–20).

Peel visitor trends

The Peel region has three National Parks-Conservation Reserves that in 2013–14 attracted over 520,000 visitors or around one sixth of Peel's estimated visitors. The Parks' close proximity to Perth encourages daytrips and overnight trips. In recent years an increase in mountain biking, hiking/walking and camping has also prompted upgrades to some trails and Park amenities. Trends in visitors across the three Parks/Reserves are summarised below and shown in Figure 3.

- Visitation to Yalgorup National Park has increased significantly since 2004–05. This also includes vehicles accessing the adjacent coastline via the national park.
- Visitation to Lane Poole Reserve has increased modestly since 2004–05. Visitation is expected to increase more noticeably in the coming years with recent and proposed upgrades to campgrounds, trails and amenities especially mountain biking facilities.
- Visitation to Serpentine National Park was trending steadily upwards until 2012–13 when visitation began to exceed capacity and temporary closures were required. Anticipated upgrades to parking, trails and amenities are expected to enable an increase in visitation in the short-medium term.

Analysis of overnight and daytrip data[33] for Peel (Figure 4) during 2006 to 2015 highlights the following trends:

- Domestic visitor levels declined from 2006 to 2010 and thereafter followed an upwards trend averaging 9.7% p.a. growth during 2010 to 2015.
- International visitors averaged 24,468 p.a. during 2006 and 2015, and recently in 2014 and 2015 trending above average.
- Daytrip visitor levels fell to a low in 2010 and have been trending upwards at 8.5% p.a. average growth during 2010–15, which is above State trends in daytrip visitation.

Analysis of visitor nights for Peel (Figure 5) during 2006 to 2015 highlights the following trends:

- Domestic visitor nights averaged 1.195 million during 2006 to 2015 with a low of 968,000 in 2008, and thereafter averaging 6.2%p.a. growth leading to 1.893 million visitor nights in 2015.
- International visitor nights increased from 241,634 in 2006 to a high of 677,852 in 2011 (or 26.6% average annual growth), and thereafter falling steadily to a low of 395,348 n 2015 (or 12.0% average annual decrease), indicating a downward trend in length of stay (given that visitor numbers increased during this period).

Peel tourism target markets

Tourism strategies for the Shires of Murray and Boddington and the CoM focus on adventure experiences in targeting visitors to their respective LGA and the region. Both soft and hard adventures are integral in promoting leisure-holiday experiences in Peel. The visitor markets outlined in existing tourism strategies of Peel's LGAs (Table 10) are also consistent with those adopted by MAPTO.

32 TRA 2016 (unpublished data).

33 TRA 2016 (unpublished data).

Table 9. Visitors to Peel 2006 and 2015

Visitors year ending Dec 2006 ('000)				Visitors year ending Dec 2015 ('000)		
Domestic	International	Daytrip	Peel region	Domestic	International	Daytrip
491	18.1	1,824	Total visitors	548	28.3	2,476
			Purpose of visit			
228	9.7	1,007	Holiday and leisure	236	12.9	1,176
150	7.0	650	Visiting friends & relatives	230	14.7	799
			Business			381
			Origin			
450			Intrastate	491		
			Asia		11.2	
	2.5		European Union		4.3	
	9.0		United Kingdom		7.0	
			Travel party			
153	7.2		Adult couple	151	10.3	
88	7.5		Travelling alone	167	11.8	
118			Family group			
118			Friends/relatives	129		
			Gender			
250			Female	311	15.6	1,008
241	10.7	964	Male	238	12.6	1,468
			Age			
106		325	15–24			
66		274	25–34			
94	6.0	405	35–44		9.7	
80		288	45–54	103		523
143	7.5	531	55+	148	12.4	829
			Main activities undertaken			
217		743	Visit friends and relatives	294		990
146		307	Beach	195		375
102		352	Shopping			
206		730	Eat/dine out restaurant	246		987
138		546	Sightseeing	116		476
162		930	Other^	169		1,436
		2,333	**Total all visitors**			**3,052**

^ 'Other' is not specified but may include visits to national parks, markets, galleries, events, bush walks, picnics, sports, etc. Blank cells are reported by TRA as 'not published'.

Source: TRA 2016 (unpublished data)

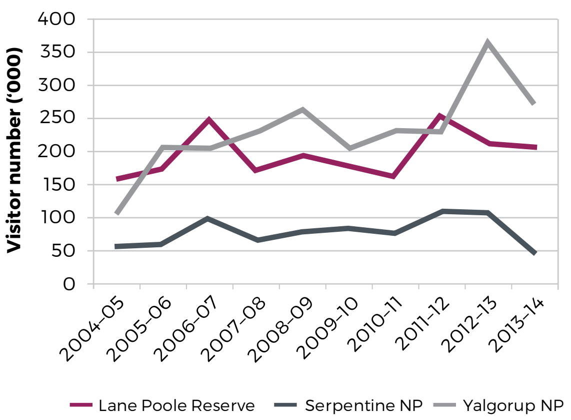


Figure 3. Visitation to parks-reserves in Peel
Source: Department of Parks & Wildlife

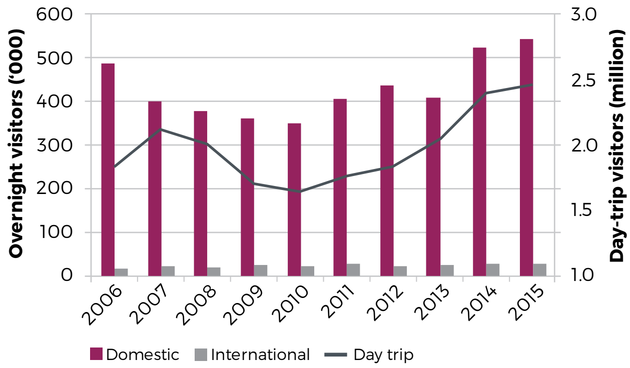


Figure 4. Peel visitor trends 2006–15
Source: TRA 2016 (unpublished data)

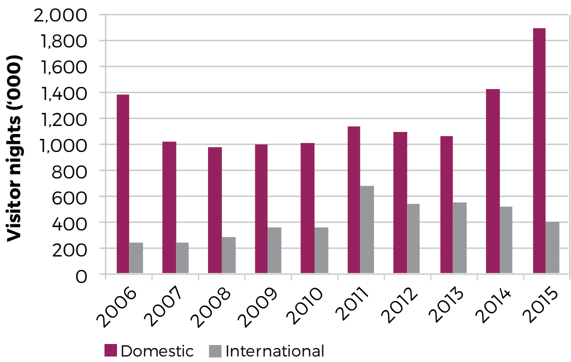


Figure 5. Peel visitor nights trends
Source: TRA 2016 (unpublished data)

Table 10. Target visitor market to Peel LGAs*

LGA/Shire	Visitor markets	Factors motivating visitors
Shire of Murray^	• Nature Based Day-trippers • Heritage Day-trippers • Mandurah Day-trippers • Family Holidaymakers • Business Travellers • School and Corporate	• Active and passive outdoor activities. • Heritage sites, drive routes and guided tours. • Nature, marine, sightseeing and hospitality. • Low cost accommodation and outdoor activities. • Value-for-money accommodation and hospitality. • Group facilities, nature and outdoor activities.
Shire of Boddington and CoM#	• Dedicated Discoverers • Aspirational Achievers • Grey Explorers • Family Connectors	• Adventure, Observation, Discovery • Indulgence, Connection, Variety • Relaxation, Connection, Observation • Variety, Connection, Relaxation

* The Shires of Waroona and Serpentine-Jarrahdale do not have current tourism plans and hence not included in this table.
^ Shire of Murray Tourism Strategy 2009–14.
\# Mandurah Tourism Strategy 2011–16, Boddington Tourism Strategy 2013.

Peel tourism economy

Peel's tourism economy is outlined below based on REMPLAN[34] and ABS data

1. Gross Regional Product (GRP)[35] for the Peel region was $6.095 billion.
2. Population (2014) was 128,798 resulting in Per Capita GRP of $47,322 and Per Worker GRP of $207,010.
3. Total output in the Peel region was $15.424 billion. The four main industry sectors contributing to output were Manufacturing $5.047 billion (32.6%), Mining $2.394 billion (15.5%), Construction $1.846 billion (12.0%), Ownership of Dwellings (7.2%), followed by Retail Trade (3.7%), Health Care and Social Assistance (2.9%), Public Administration and Safety (2.8%), Education &Training (2.5%), Rental, Hiring and Real Estate Services (2.4%), Professional, Scientific and Technical Services (2.3%), Financial and Insurance Services (2.1%), Agriculture, Forestry and Fishing (1.8%), Tourism (1.8%), Accommodation and Food Services (1.8%) and Wholesale Trade (1.6%). (Figure 6).
4. Total employment in Peel was 29,446 in 2015. The five main industry sectors contributing to employment were Retail Trade 4,025 (13.7%), Manufacturing 3,871 (13.1%), Health Care and Social Assistance 3,185 (10.8%), Construction (10.1%) followed by Education and Training (9.05), Accommodation and Food Services (7.85), Mining (6.2%), Public Administration and Safety (5.3%), Other Services (3.95), Professional, Scientific and Technical Services (3.4%), Agriculture, Forestry and Fishing (2.8%), Transport, Postal and Warehousing (2.7%), Administrative and Support Services (2.7%), Rental, Hiring and Real Estate Services (2.0%), Wholesale Trade (1.8%), Arts and Recreation Services (1.4%), Financial and Insurance Services (1.4%), Electricity, Gas, Water and Waste Services (0.8%) and Information Media and Telecommunications (0.7%).

34 REMPLAN tourism output data does not include day-trip visitors and expenditure as it defines tourism as *"Comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited."*

35 The Gross Regional Product for Peel Region was calculated using the Expenditure method. GRP is the total value of final goods and services produced in the region over the period of one year. As can be seen from the table below, this includes exports but subtracts imports. GRP can be measured by adding up all forms of final expenditure consumption by households, consumption by governments, additions or increases to assets (minus disposals) exports (minus imports) This calculation does not include intermediate expenditure as this would lead to double counting (e.g. the wheat and flour in a loaf of bread).

GRP expenditure method	$M
Household consumption	6,632.051
Government consumption	1,723.744
Private gross fixed capital expenditure	2,131.267
Public gross fixed capital expenditure	489.071
Gross regional expenses	**10,976.133**
plus regional exports	6,467.620
minus domestic imports	10,154.036
minus overseas imports	1,194.357
Gross regional product	**6,095.361**

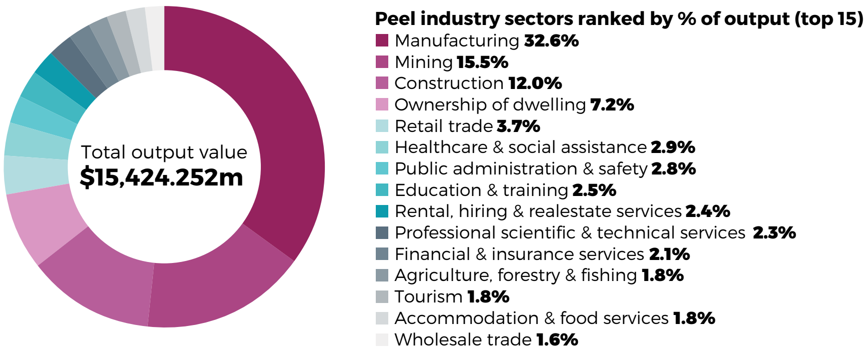


Figure 6. Peel industry sectors
Source: REMPLAN

5. Tourism output in Peel was $278 Million in 2015, contributing 1.8% of Peel's Output of $15.424 billion[36] (Figure 6).
6. Tourism is an amalgam of activities. In Peel, tourism output generated by service demand from visitors was contributed by accommodation and food services (28.5%), transport, postal and warehousing (14.2%), arts and recreation services (13.7%), retail trade (6.7%) and administrative and support services (4.1%); representing 67.2% of tourism output in Peel. An increase in visitors to Peel is expected to increase employment and output within these tourism related sectors.
7. Using REMPLAN modelling, the estimated distribution across industry sectors of every $1.00 of visitor expenditure in the Peel is shown in Table 11.

According to REMPLAN in 2015 total Output in the Peel region was estimated at $15,424.252 million. The major contributors to Output are Manufacturing (32.6%), Mining (15.5%) and Construction (12%) as shown in Table 12.

36 Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Table 11. Distribution of $1 of tourism expenditure across Peel's industry sectors

Peel region (Aug 2015)	Industry sector ($)	%
Accommodation & food services	0.40	39.9
Retail trade	0.15	14.9
Transport, postal & warehousing	0.14	13.8
Manufacturing	0.07	6.8
Ownership of dwellings	0.06	6.0
Arts & recreation services	0.05	5.5
Rental, hiring & real estate services	0.04	3.9
Administrative & support services	0.04	3.8
Education & training	0.02	1.5
Wholesale trade	0.01	1.2
Agriculture, forestry & fishing	0.01	1.0
Other services	0.01	0.7
Healthcare & social assistance	0.01	0.5
Information media & telecommunications	0.00	0.4
Financial & insurance services	0.00	0.0
Professional, scientific & technical services	0.00	0.0
Public administration & safety	0.00	0.0
Mining	0.00	0.0
Electricity, gas, water & waste services	0.00	0.0
Construction	0.00	0.0

Source: REMPLAN

Table 12. Industry sectors ranked by output Peel region (Aug 2015)

Industry sector	$M	%
Manufacturing	5,028.157	32.6
Mining	2,394.448	15.5
Construction	1,846.332	12.0
Ownership of dwellings	1,113.554	7.2
Retail trade	574.310	3.7
Health care and social assistance	454.558	2.9
Public administration and safety	429.267	2.8
Education and training	391.254	2.5
Rental, hiring and real estate services	373.844	2.4
Professional, scientific and technical services	349.608	2.3
Financial and insurance services	317.072	2.1
Agriculture, forestry and fishing	283.260	1.8
Tourism	278.970	1.8
Accommodation and food services	278.703	1.8
Wholesale trade	251.177	1.6
Administrative and support services	245.194	1.6
Transport, postal and warehousing	231.947	1.5
Other services	202.766	1.3
Electricity, gas, water and waste services	157.960	1.0
Information media & telecommunications	125.861	0.8
Arts and recreation services	96.011	0.6

Source: REMPLAN

Employment in the Peel

Total Employment in the Peel region was estimated at 29,446 jobs. The major contributors to employment are Retail Trade (13.7%), Manufacturing (13.1%) and Healthcare and Social Assistance (10.8%) and Construction (10.1%) as shown in Table 13.

Value-added in the Peel

The Total Value-added[37] in the Peel Region was estimated at $5,459.442 million. The major contributors to value-added are Rental, Hiring and Real Estate Services (19.2%), Mining (12.7%) and Construction (10.7%) as show in Table 14.

37 Value-added data represents the marginal economic value that is added by each industry sector in a defined region. Value-added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production. Value-added by industry sector is the major element in the calculation of Gross Regional Product/Gross State Product/Gross Domestic Product.

Table 13. Employment by sector Peel region (Aug 2015)

Industry sector	Jobs	%
Retail trade	4,025	13.7
Manufacturing	3,871	13.1
Health care & social assistance	3,185	10.8
Construction	2,973	10.1
Education & training	2,643	9.0
Accommodation & food services	2,305	7.8
Mining	1,839	6.2
Public administration & safety	1,561	5.3
Other services	1,160	3.9
Professional, scientific & technical services	999	3.4
Agriculture, forestry & fishing	834	2.8
Transport, postal & warehousing	796	2.7
Administrative & support services	792	2.7
Rental, hiring & real estate services	602	2.0
Wholesale trade	532	1.8
Arts & recreation services	477	1.6
Financial & insurance services	410	1.4
Electricity, gas, water & waste services	245	0.8
Information media & telecommunications	197	0.7
Total	**29,446**	

Source: REMPLAN

Table 14. Value-added by sector Peel region (Aug 2015)

Industry sector	$M	%
Rental, hiring & real estate services	1,050.266	19.2
Mining	691.861	12.7
Construction	583.702	10.7
Manufacturing	511.986	9.4
Retail trade	364.959	6.7
Health care & social assistance	355.313	6.5
Education & training	300.396	5.5
Public administration & safety	245.141	4.5
Financial & insurance services	210.480	3.9
Accommodation & food services	179.851	3.3
Professional, scientific & technical services	173.419	3.2
Agriculture, forestry & fishing	134.974	2.5
Administrative & support services	133.955	2.5
Wholesale trade	123.870	2.3
Transport, postal & warehousing	121.633	2.2
Other services	96.084	1.8
Electricity, gas, water & waste services	86.425	1.6
Information media & telecommunications	54.592	1.0
Arts & recreation services	40.531	0.7
Total	**$5,459.442**	

Source: REMPLAN

Key driving sectors

The industry sectors which are the key drivers of the Peel Region Region's economy in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages) are detailed in Table 15. The key driving sectors in the Peel are Construction and Manufacturing.

The industry sectors which correspond to a ✔ in Table 15 are amongst the top 5 contributors (of 19 sectors) to economic activity in the Peel Region in relation to backward linkages, exports, employment, and value-added.

Value-added – represents the marginal economic value that is added by each industry sector in a defined region. Value-added is calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector. Value-added by industry sector is the major element in the calculation of Gross Regional Product.

Employment – the key social outcome of economy development; employment data represents the number of people employed by businesses/organisations in each of the industry sectors in the Peel Region.

Regional exports – represents the value of goods and services exported outside of the Peel Region that have been generated by local businesses/organisations. Another way of defining exports is as an inflow of money into the region, i.e. Motels have an inflow of money from people who live outside the region's boundaries thus they are earning export equivalent dollars.

Backward linkages – details the industry sectors which spend the most on locally sourced intermediate goods and services per dollar of output. These industry sectors may not necessarily make the largest contributions to the Region's economy at present however due to well-developed local supply chains these sectors have a significant capacity to deliver broad based economic benefits for the region.

Table 15. Peel key sectors (2015)

Industry sectors	Backward linkages	Exports	Employment	Value-added	Total
Agriculture, forestry & fishing		✔			1
Mining	✔	✔		✔	3
Manufacturing	✔	✔	✔	✔	4
Electricity, gas, water & waste services					0
Construction	✔	✔	✔	✔	4
Wholesale trade					0
Retail trade			✔	✔	2
Accommodation & food services					0
Transport, postal & warehousing	✔				1
Information media & telecommunications					0
Financial & insurance services					0
Rental, hiring & real estate services		✔		✔	2
Professional, scientific & technical services					0
Administrative & support services					0
Public administration & safety					0
Education & training			✔		1
Health care & social assistance			✔		1
Arts & recreation services	✔				1
Other services					0

Source: REMPLAN

Across these measures of economic activity the key propulsive drivers of the Peel Region Region's economy, in **descending order from most significan**t, are shown in Table 16.

Table 16. Most significant sectors in the Peel economy

Industry sectors	Total
Construction	4
Manufacturing	4
Mining	3
Rental, Hiring & Real Estate Services	2
Retail Trade	2
Education & Training	1
Health Care & Social Assistance	1
Agriculture, Forestry & Fishing	1
Transport, Postal & Warehousing	1
Arts & Recreation Services	1

Source: REMPLAN

Tourism linkages

The percentages in Table 17 are based on the specific role and structure of Tourism in the Peel Region economy. The greater the number of visitors to the area, the greater the employment in tourism related industry sectors, and therefore the higher the estimated value of tourism in Peel Region (Table 15). The Tourism sector has the most significant links the Accommodation and Food Services (39.9%), Retail Trade (14.9%), Transport, Postal and Warehousing (13.8%), Manufacturing (6.8%) and Ownership of Dwellings (6.0%) Sectors.

As shown in Table 16 and Table 17, the Retail Trade Sector is a key employer and generator of value-added and the Transport, Postal and Warehousing Sector drives backward linkages (spending on locally sourced good and services). Thus, Tourism is a key contributor to regional employment, value-added and intermediate demand for local goods and services by virtue of its linkages with the Retail Trade and Transport, Postal and Warehousing Sectors.

Peel tourism industry

A majority of Peel's tourism product and infrastructure is concentrated in the CoM and the Shire of Murray, reflecting a history of being a popular holiday region. This provided support for stakeholders suggesting future tourism investment should focus on sites outside of Peel's urbanised areas to broaden the range of visitor options across the Peel. Findings from an audit of Peel's five-A's of tourism follows[38] and details on Peel's existing tourism attractions, activities and accommodation is presented in Figure 7.

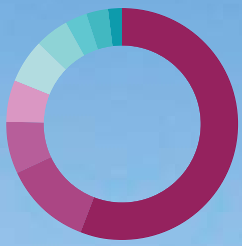
- More than 160 accommodation facilities with the majority being holiday homes. 3–4 star hotels, units and apartments, and caravan parks are also widely available in the urban areas. The rural areas host Bed and Breakfasts, farm stays and cabins/studios.
- More than 170 attractions with over 120 in the CoM and the Shire of Murray. The majority of these are historical places, hospitality, parks and gardens, beaches, lakes and rivers (i.e. day use areas).
- More than 70 activities including 36 trails, 16 adventure-recreation based and 14 aquatic-based hires and tours.
- More than 200 amenities including boat ramps, pens/moorings, BBQ and picnic areas, toilets, playgrounds and bike/skate parks. The majority are in the CoM and the Shire of Murray.
- Access is predominantly via the Forrest and South West highways and Pinjarra Road. The region is also supported by the Perth-Mandurah train line and safe anchorages in Mandurah and the Peel-Harvey estuary.

38 Based on a desktop audit of tourism websites, brochures, maps and strategies. Tourism audits may exclude unlisted ventures, products or infrastructure resulting in an incomplete tally and should be taken as a guide only.

Table 17. Tourism sector linkages in the Peel region

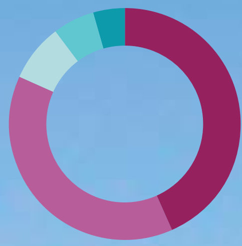
Industry Sector	$M	%
Accommodation & food services	111.192	39.9
Retail trade	41.693	14.9
Transport, postal & warehousing	38.487	13.8
Manufacturing	19.015	6.8
Ownership of dwellings	16.657	6.0
Arts & recreation services	15.291	5.5
Rental, hiring & real estate services	10.918	3.9
Administrative & support services	10.565	3.8
Education & training	4.316	1.5
Wholesale trade	3.390	1.2
Agriculture, forestry & fishing	2.688	1.0
Other services	1.902	0.7
Health care & social assistance	1.473	0.5
Information media & telecommunications	1.246	0.4
Financial & insurance services	0.137	0.0
Professional, scientific & technical services	0.000	0.0
Construction	0.000	0.0
Public administration & safety	0.000	0.0
Electricity, gas, water & waste services	0.000	0.0
Mining	0.000	0.0
Total	**278.970**	

Source: REMPLAN



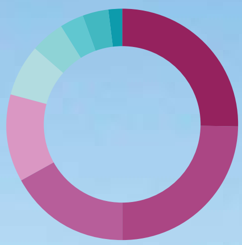
Peel accommodation by type
(no. of each type)

- Holiday home/cottage **93**
- 3-4 Star hotel, apartments & units **20**
- Caravan/tourist/transit park **12**
- Farm-stay & B+B **10**
- Other **10**
- Hotel/pub/motel **8**
- Cabin/chalet/studio **5**
- Campground **5**
- 4.5-5 Star hotel/resort **3**



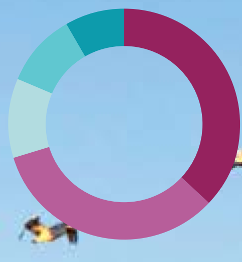
Peel accommodation by location
(no. in each location)

- Mandurah **72**
- Murray **64**
- Waroona **13**
- Serpentine-Jarrahdale **10**
- Boddington **7**



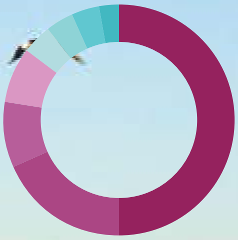
Peel attractions by type
(no. of each type)

- Gardens, parks, forests **43**
- Pub, winery, brewery, restaurant/cafe, markets **42**
- Historical places, monuments & walks **29**
- Beaches, lakes, dams, weir **21**
- Art-craft gallery, exhibition space **12**
- Other including entertainment **8**
- Marine & terrestrial features & sites **6**
- Library, museum, discovery centre **6**
- Horse/greyhound races **3**



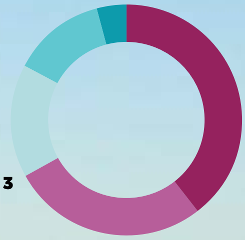
Peel attractions by location
(no. in each location)

- Mandurah **64**
- Murray **57**
- Serpentine-Jarrahdale **19**
- Boddington **18**
- Waroona **14**



Peel activities by type
(no. of each type)

- Walk, bike, bridal, canoe & 4WD trail **38**
- Boat, houseboat, canoe, jet ski hire & tour **14**
- Golf course/club **7**
- Other **6**
- Entertainment, fairground, adrenalin-activity **3**
- Self-drive trail **3**
- Aquatic-marine (fishing, diving, swimming, boarding, etc) **3**
- Bus, 4WD, car, bike, motorbike hire & tour **2**



Peel activities by location
(no. in each location)

- Mandurah **30**
- Murray **21**
- Serpentine-Jarrahdale **12**
- Waroona **10**
- Boddington **3**

Figure 7. Peel tourism audit
Source: Marketrade

APPENDIX 2 PEEL TOURISM INFRASTRUCTURE INVESTMENT OPPORTUNITIES

1. Trail hubs

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Dwellingup Hub Upgraded hub/ visitor centre, toilets/ showers, laundry, shade shelters, parking, trail links, signage, Wi-Fi, picnic area, lighting, utilities upgrade	$2.5M	Daytrip: 50,000 Domestic over night: 11,625 International over night: 875	Output ($M): 4.620 Employment (FTE): 9 Wages ($M): 0.869 Value-added ($M): 1.669	Output ($M): 12.499 Employment (FTE): 48 Wages ($M): 3.170 Value-added ($M): 1.009	Net benefit: $14.62M B:C ratio 5.85:1
Jarrahdale Trail Hub In Jarrahdale with trails linking Serpentine NP to Jarrahdale; Includes area to host 6–8 self-contained RV's plus dump point, toilets/ showers, water outlet, shade shelter, BBQ's, parking & lighting	$0.75M	Daytrip: 1,250 Domestic over night: 1,860 International over night: 140	Output ($M): 0.924 Employment (FTE): 2 Wages ($M): 0.174 Value-added ($M): 0.334	Output ($M): 2.335 Employment (FTE): 9 Wages ($M): 0.592 Value-added ($M): 1.138	Net benefit: $2.76M B:C ratio 5.52:1
Automated Adventure Equipment Hire Facilities Includes four mobile facilities, fully stocked-equipped and functioning, ready to operate; hiring bikes, canoes, fishing rods, chairs, swags and aquatic devices	$1.6M	Daytrip: 40,000	Output ($M): 2.975 Employment (FTE): 6 Wages ($M): 0.556 Value-added ($M): 1.068	Output ($M): 6.574 Employment (FTE): 25 Wages ($M): 1.667 Value-added ($M): 3.203	Net benefit: $7.95M B:C ratio 4.97:1

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Hotham River Precinct Revitalisation & Trails Hub Toilets, showers, parking, shaded seating, water, BBQ's...	$0.75M	Daytrip: 12,500	Output ($M) 1.478 Employment (FTE): 3 Wages ($M): 0.278 Value-added ($M): 0.534	Output ($M): 2.054 Employment (FTE): 8 Wages ($M): 0.521 Value-added ($M): 1.00	Net benefit: $2.73M B:C ratio 3.41:1
Whitby-Jarrahdale Train Line & Puffing Billy Restored train line & bridge, with turntables, & Puffing Billy train, linking Perth-Bunbury rail line to Jarrahdale Hub	$1.75M	Daytrip: 12,500	Output ($M): 2.772 Employment (FTE): 5 Wages ($M): 0.522 Value-added ($M): 1.002	Output ($M): 2.054 Employment (FTE): 8 Wages ($M): 0.521 Value-added ($M): 1.001	Net benefit: $3.33M B:C ratio 2.22:1
Forest Heritage Centre Expansion to house new Aboriginal Heritage displays & theming	$1.4M	Daytrip: 17,500 Domestic over night: 6,045 International over night: 455 Extra nights per visitor: 2	Output ($M): 2.587 Employment (FTE): 5 Wages ($M): 0.487 Value-added ($M): 0.935	Output ($M): 1.32 Employment (FTE): 5 Wages ($M): 0.333 Value-added ($M): 0.64	Net benefit: $2.51M B:C ratio 1.79:1
Interpretive-Visitor-Community Centre, Boddington Multi-purpose facility servicing visitors, tourism & community enterprise programs	$3.5M VC: $0.8M Comm. Centre: $2.7M TOTAL: $3.5M VC = 180m² @ $4500/m² CC=540m² @ $5000/m²	Daytrip: 8,000 Domestic over night: 3720 International over night: 280 Extra nights per visitor: 2	Output ($M): 6.467 Employment (FTE): 13 Wages ($M): 1.217 Value-added ($M): 2.337	Output ($M): 0.635 Employment (FTE): 2 Wages ($M): 0.161 Value-added ($M): 0.31	Net benefit: $3.602M B:C ratio 1.03:1

^ Expressed as ADDITIONAL visitors annually resulting from the proposed investment.

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\# Net Benefit = (construction + operational output) less capex

† Annualised Benefit-Cost ratio = Net Benefit: capex. General rule B:C > 1.0 is favourable and warrants investigation and/or support.

2. Trail networks

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Peel Arts & Culture Trail An all year round trail of connected businesses and artists with hub at the Mandurah Performing Arts Centre. Further development requires a Coordinator to create & commission the trail, run an inaugural event & develop the trails profile & marketing	$0.5M	Daytrip: 10,000 Domestic over night: 6510 International over night: 490 Extra nights per visitor: 1	Output ($M): 0.838 Employment (FTE): 2 Wages ($M): 0.304 Value-added ($M): 0.445	Output ($M): 4.041 Employment (FTE): 16 Wages ($M): 1.025 Value-added ($M): 1.969	Net benefit: $4.38M B:C ratio 8.76:1
Peel Regional Park Upgraded trails, boardwalks, lookouts, hides, signage, parking, access/entry roads, shaded picnic areas & toilets	$3.25M	Daytrip: 80,000 Domestic over night: 14800 International over night: 1600 Extra nights per visitor: 2	Output ($M): 6.006 Employment (FTE): 12 Wages ($M): 1.130 Value-added ($M): 2.170	Output ($M): 24.183 Employment (FTE): 93 Wages ($M): 6.13 Value-added ($M): 11.78	Net benefit: $26.939M B:C ratio 8.29:1
Indigenous Walk Trail Part of the Peel Zoo Relocation along Darling Scarp – a possible Public-Private Partnership with Indigenous and Conservation Groups	$1.6M	Daytrip: 60,000	Output ($M): 2.957 Employment (FTE): 6 Wages ($M): .556 Value-added ($M): 1.068	Output ($M): 9.861 Employment (FTE): 38 Wages ($M): 2.501 Value-added ($M): 4.804	Net benefit: $11.22M B:C ratio 7.01:1
Serpentine NP Trails Upgrade Includes new car park & picnic areas, upgrade Kitty Gorge trail walk trails to new viewing areas	$1.4M	Daytrip: 50,000 Overnight: N/A Average: 78,000 visits p.a.	Output ($M): 2.587 Employment (FTE): 5 Wages ($M): 0.487 Value-added ($M): 0.935	Output ($M): 8.217 Employment (FTE): 32 Wages ($M): 2.084 Value-added ($M): 4.004	Net benefit: $9.40M B:C ratio 6.72:1
Rail Trail Dwellingup to Boddington Dual-use trail for walk/hike & mountain bike, with huts, markers & access points for pick-up/drop-off	$2.0M Includes repairs to Tullis Bridge, Dieback control, hut construction and trail infrastructure.	Daytrip: 20,000	Output ($M): 2.772 Employment (FTE): 5 Wages ($M): 0.522 Value-added ($M): 1.002	Output ($M): 3.287 Employment (FTE): 13 Wages ($M): 0.834 Value-added ($M): 1.601	Net benefit: $4.56M B:C ratio 3.04:1

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Yalgorup National Park Upgraded access road, new trails linking to sites, new boardwalks & lookouts, with new connecting trails	$1.5M	Daytrip: 12,500 Average: 110,000 visits p.a.	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695 Value-added ($M): 1.336	Output ($M): 2.054 Employment (FTE): 8 Wages ($M): 0.521 Value-added ($M): 1.001	Net benefit: $3.75M B:C ratio 1.88:1
Lane Poole Trail Additions & Upgrades New/upgraded trails for canoe, walk, 4WD & mountain bike; plus bridge & road upgrades to expand trail network/linkages into Dwellingup	$6.25M	Daytrip: 50,000 Domestic over night: 11,160 International over night: 840 (4-year average: 195,000 visits p.a.)	Output ($M): 11.549 Employment (FTE) 23 Wages ($M): 2.173 Value-added ($M): 4.147	Output ($M): 12.212 Employment (FTE): 47 Wages ($M): 3.098 Value-added ($M): 5.95	Net benefit: $10.84M B:C ratio 1.81:1

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Net Benefit = (construction + operational output) less capex

† Annualised Benefit-Cost ratio = Net Benefit: capex. General rule B:C > 1.0 is favourable and warrants investigation and/or support.

3. Accommodation nodes

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Upmarket Camping Serpentine – Jarrahdale Glamping at/near Serpentine NP or Jarrahdale town; for pre-planning, services/utilities & investment attraction	$1.25M	Daytrip: N/A Domestic over night: 9,765 International over night: 735	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695 Value-added ($M): 1.33	Output ($M): 11.179 Employment (FTE): 43 Wages ($M): 2.835 Value-added ($M): 5.44	Net benefit: $12.88M B:C ratio 6.44:1
Upmarket Camping Glamping in/near Yalgorup NP; For pre-planning, services/ utilities & investment attraction	$1.0M	Daytrip: N/A Domestic over night: 9,765 International over night: 735	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695 Value-added ($M): 1.33	Output ($M): 11.179 Employment (FTE): 43 Wages ($M): 2.835 Value-added ($M): 5.447	Net benefit: $12.88M B:C ratio 6.44:1
Short Stay Accommodation Pinjarra For site works and upgraded services infrastructure to host 10–15 small cabins & RV Park facilities; operator funds & builds accommodation facilities	$2.0M	Daytrip: N/A Domestic over night: 9,300 International over night: 700	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695 Value-added ($M): 1.336	Output ($M): 10.647 Employment (FTE): 41 Wages ($M): 2.700 Value-added ($M): 5.18	Net benefit: $12.34M B:C ratio 6.17:1
RV Park/Short Stay Accommodation Pinjarra Head works to vacant land adjacent to an existing caravan park to enable private development; site to host 10–15 small cabins & RV Park facilities; operator funds & builds facilities	$1.5M	Daytrip: N/A Domestic over night: 9,300 International over night: 700	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695 Value-added ($M): 1.33	Output ($M): 10.64 Employment (FTE): 41 Wages ($M): 2.70 Value-added ($M): 5.18	Net benefit: $12.34M B:C ratio 6.17:1
Low Cost Small Group Accommodation At/near Jarrahdale or Serpentine NP; For site works and services infrastructure. Private operators to construct & operate the facility	$1.25M	Daytrip: N/A Domestic over night: 9,300 International over night: 700	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695 Value-added ($M): 1.33	Output ($M): 10.647 Employment (FTE): 41 Wages ($M): 2.700 Value-added ($M): 5.18	Net benefit: $12.34M B:C ratio 6.17:1

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
RV Park & Camping Area At Hamel Arboretum or Hamel Heritage Precinct, 2km south of Waroona; Includes dump point, water tap, 6–8 sites/bays, short walk trail, toilets, shade, fire rings	$0.75M	Daytrip: 1,250 Domestic over night: 1,860 International over night: 140	Output ($M): 1.386 Employment (FTE): 3 Wages ($M): 0.261 Value-added ($M): 0.50	Output ($M): 2.335 Employment (FTE): 9 Wages ($M): 0.592 Value-added ($M): 1.13	Net benefit: $2.76M B:C ratio 5.52:1
Mandurah Backpackers For site works and services infrastructure only. Private investors to build & operate	$1.5M	Daytrip: N/A Domestic over night: 100 International over night: 900+	Output ($M): 2.772 Employment (FTE): 5 Wages ($M): 0.522 Value-added ($M): 1.00	Output ($M): 2.656 Employment (FTE): 10 Wages ($M): 0.674 Value-added ($M): 1.294	Net benefit: $3.93M B:C ratio 2.62:1
Boddington Hotham Accommodation Upgrade Head works upgrade to Caravan Park & adjacent land to build new 10–15 bay RV Park, 10 Park Cabins & refurbish Old Police Station into 20-bed backpackers	$3.5M	Daytrip: N/A Domestic over night: 4800 International over night: 600 Extra nights per visitor: 2	Output ($M): 6.452 Employment (FTE): 15 Wages ($M): 1.253 Value-added ($M): 2.377	Output ($M): 3.601 Employment (FTE): 14 Wages ($M): 0.913 Value-added ($M): 1.755	Net benefit: $6.553M B:C ratio 1.87:1

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\# Net Benefit = (construction + operational output) less capex

† Annualised Benefit-Cost ratio = Net Benefit: capex. General rule B:C > 1.0 is favourable and warrants investigation and/or support.

\+ According to TNS, 90% of backpackers are International Visitors staying 17.5 nights on average. A 60 bed hostel could accommodate up to 1000 backpackers p.a. at 80% occupancy.

4. Waterway adventures

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Fish Restocking & Habitat Enhancement 5-year program, restocking Marron & Trout in Lake Navarino & Drakesbrook Weir + placing artificial habitats	$0.5M ($0.1M p.a. for 5 years)	Daytrip: 12,500	Output ($M): 0.803 Employment (FTE): 1 Wages ($M): 0.244 Value-added ($M): 0.410	Output ($M): 2.054 Employment (FTE): 8 Wages ($M): 0.521 Value-added ($M): 1.001	Net benefit: $2.857M B:C ratio 5.7:1
Aboriginal Meeting Place Mandjar Bay foreshore; fire ring, seating, interpretive panels, shade shelter, short walk trail, native plants & landscaping	$0.5M	Daytrip: 21,500 Domestic over night: 9,765 International over night: 735	Output ($M): 2.772 Employment (FTE): 5 Wages ($M): 0.522 Value-added ($M): 1.002	Output ($M): 7.13 Employment (FTE): 27 Wages ($M): 1.808 Value-added ($M): 3.47	Net benefit: $8.40M B:C ratio 5.60:1
Aquatic Adventure Precinct Linking Lake Navarino & Drakesbrook Weir; includes upgraded utilities/head works, site preparation, parking, short connecting trails, picnic areas	$4.0M	Daytrip: 50,000 Domestic over night: 20,925 International over night: 1,575	Output ($M): 7.391 Employment (FTE): 14 Wages ($M): 1.391. Value-added ($M): 2.67	Output ($M): 15.92 Employment (FTE): 61 Wages ($M): 4.039. Value-added ($M): 7.75	Net benefit: $19.31M B:C ratio 4.83:1
Aboriginal Meeting Place Pinjarra Foreshore Fire ring, seating, interpretive panels, toilets, shade shelter, short walk trail	$0.5M	Daytrip: 6000 Domestic over night: 1080 International over night: 600	Output ($M): 0.924 Employment (FTE): 2 Wages ($M): 0.174 Value-added ($M): 0.334	Output ($M): 1.456 Employment (FTE): 6 Wages ($M): 0.369 Value-added ($M): 0.71	Net benefit: $1.88M B:C ratio 3.76:1
Port Mandurah Canal Jetty & Poles Enabling boats to moor & visit two heritage sites at Sutton Farms & Pickaroon Place	$0.8M	Daytrip: 12,500	Output ($M): 1.478 Employment (FTE): 3 Wages ($M): 0.278 Value-added ($M): 0.534	Output ($M): 2.054 Employment (FTE): 8 Wages ($M): 0.521 Value-added ($M): 1.00	Net benefit: $2.73M B:C ratio 3.41:1
White-Water Rafting & Aquatic Facility Portion of Lake Navarino, using Alcoa Mine Lakes water, rapids & running water for rafting, canoeing etc	$2.5M	Daytrip: 37,500	Output ($M): 4.620 Employment (FTE): 9 Wages ($M): 0.869 Value-added ($M): 1.669	Output ($M): 6.163 Employment (FTE): 24 Wages ($M): 1.563 Value-added ($M): 3.00	Net benefit: $8.28M B:C ratio 3.31:1

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Recreational Boat Ramps Yunderup At one site, two new boat ramps with adequate parking adjacent	$1.5M	Daytrip: 17,500	Output ($M): 2.402 Employment (FTE): 5 Wages ($M): 0.452 Value-added ($M): 0.86	Output ($M): 2.876 Employment (FTE): 11 Wages ($M): 0.729 Value-added ($M): 1.40	Net benefit: $3.98M B:C ratio 3.0:1
Pinjarra Foreshore Redevelopment As per existing concepts & plans proposed by the Shire	$2.5M	Daytrip: 12,500 Domestic over night: 6975 International over night: 525	Output ($M): 4.620 Employment (FTE): 9 Wages ($M): 0.869 Value-added ($M): 1.669	Output ($M): 4.623 Employment (FTE): 18 Wages ($M): 1.173. Value-added ($M): 2.25	Net benefit: $6.74M B:C ratio 2.69:1
Hotham Weir Restoration & 4WD Park Repairs to town weir wall, installation of day use amenities & new 4WD park in adjacent disused catchment	$2.0M	Daytrip: 10,000	Output ($M): 3.696 Employment (FTE): 7 Wages ($M): 0.695. Value-added ($M): 1.33	Output ($M): 2.387 Employment (FTE): 9 Wages ($M): 0.605 Value-added ($M): 1.16	Net benefit: $4.083 M B:C ratio 2.04:1
Boat & Houseboat moorings & jetties Murray River, Pinjarra to Ravenswood; Minimum 6 additional sites upgraded/created to host 12+ boats	$1.2M	Daytrip: 6,500	Output ($M): 2.217 Employment (FTE): 4 Wages ($M): 0.417 Value-added ($M): 0.801	Output ($M): 1.068 Employment (FTE): 4 Wages ($M): 0.271 Value-added ($M): 0.52	Net benefit: $2.09M B:C ratio 1.74:1

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5. Event, tourism and hospitality innovation

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Swooping /Canopy-Piloting Event Professional parachutists navigating over/on Mandjar Bay at high speed in a competitive event	$2.0M (4 years @ $0.5M p/a)	Daytrip: 25,000 Domestic over night: 6975 International over night: 525 Extra nights per visitor: 1	Output ($M): 0.667 Employment (FTE): 3 Wages ($M): 0.157 Value-added ($M): 0.279	Output ($M): 6.677 Employment (FTE): 26 Wages ($M): 1.694 Value-added ($M): 3.253	Net benefit: $6.9M B:C ratio 17.36:1
Peel Food Trail & Event For a Coordinator to facilitate the trail, run an inaugural event & develop the trail's profile	$0.50M	Daytrip: 20,000 Domestic over night: 8370 International over night: 630 Extra nights per visitor: 1	Output ($M): 0.838 Employment (FTE): 2 Wages ($M): 0.304 Value-added ($M): 0.445	Output ($M): 6.369 Employment (FTE): 24 Wages ($M): 1.616 Value-added ($M): 3.103	Net benefit: $6.71M B:C ratio 13.41:1
Light Shows Transportable lighting facilities projecting light shows at one or more locations; re-usable year-round at events, town shows / fairs; Includes cost to source & commission four units	$0.8M	Daytrip: 40,000	Output ($M): 1.478 Employment (FTE): 3 Wages ($M): 0.278 Value-added ($M): 0.534	Output ($M): 6.574 Employment (FTE): 25 Wages ($M): 1.667 Value-added ($M): 3.20	Net benefit: $7.25M B:C ratio 9.06:1
Peel Food and Wine Event For a coordinator to facilitate the trail and run an inaugural event and develop the trail's profile	$0.75M	Daytrip: 20,000 Domestic over night: 8,370 International over night: 630 Extra nights per visitor: 1	Output ($M): 1.135 Employment (FTE): 5 Wages ($M): 0.295 Value-added ($M): 0.544	Output ($M): 6.369 Employment (FTE): 43 Wages ($M): 2.866 Value-added ($M): 5.505	Net benefit: $6.754M B:C ratio 9.0
Mandurah Solar Race Event Two-day event based on the Isle of Mann road race; a 12/24-hr endurance event; racing on local roads	$2.0 (4 years @ $0.5M p.a)	Daytrip: 9,000 Domestic over night: 3720 International over night: 280 Extra nights per visitor: 1	Output ($M): 0.828 Employment (FTE): 3 Wages ($M): 0.32 Value-added ($M): 0.462	Output ($M): 2.849 Employment (FTE): 11 Wages ($M): 0.723 Value-added ($M): 1.388	Net benefit: $3.18M B:C ratio 6.35:1
Food Innovation Hub Boutique agri-food processing/packaging & export/wholesale facility, retail, tours, training, start-ups, micro-ventures; Includes 900m^2 facility, parking, basic plant/equipment, cold storage; focus is local & WA produce & food tourism	$5.0M	Daytrip: 140,000	Output ($M): 9.239 Employment (FTE): 18 Wages ($M): 1.738 Value-added ($M): 3.339	Output: 23.008 Employment: 88 Wages: 5.836 Value-added: 11.21	Net benefit: $27.25M B:C ratio 5.45:1

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Murray Regional Equestrian & Function Centre A 'State-of-the-art' centre with facilities to cater for all equestrian disciplines. Stage Two includes construction of a multi-functional area and grounds for equine events	Stage 2: $2.2M Excludes: Stage 3: $11.0M	Stage 2: Daytrip: 35,000 Domestic over night: 4,650 International over night: 450 Extra nights per visitor: 2	Output ($M): 4.065 Employment (FTE): 8 Wages ($M): 0.765 Value-added ($M): 1.46	Output ($M): 9.205 Employment (FTE): 35 Wages ($M): 2.335 Value-added ($M): 4.45	Net benefit: $11.07M B:C ratio 5.03:1
Business-Corporate Conference Facility Refurbish the interior of two existing buildings; expand the kitchen into a VET training facility; create 400–1000 seat conference capacity; Includes interior upgrades to existing buildings plus furnishings, equipment & amenities for 500+ people	$1.8M	Daytrip: 7,000 Domestic over night: 8,100 International over night: 900 Extra nights per visitor: 2	Output ($M): 3.326 Employment (FTE): 7 Wages ($M): 0.626 Value-added ($M): 1.202	Output ($M): 7.197 Employment (FTE): 28 Wages ($M): 1.825 Value-added ($M): 3.50	Net benefit: $8.723M B:C ratio 4.85:1
Fairbridge Centre of Excellence in Festivals, Events & Tourism Training	$9.0M	Daytrip: 70,000	Output ($M): 16.631 Employment (FTE): 33 Wages ($M): 13.129 Value-added ($M): 6.010	Output ($M): 11.504 Employment (FTE): 44 Wages ($M): 2.918 Value-added ($M): 5.60	Net benefit: $19.14M B:C ratio 2.13:1

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Net Benefit = (construction + operational output) less capex

† Annualised Benefit-Cost ratio = Net Benefit: capex. General rule B:C > 1.0 is favourable and warrants investigation and/or support.

6. Mixed adventures

Project title	Capex	Visitation^	Impacts – construction	Impacts – operation*	Benefit# & ratio†
Mandjar Bay Eastern Foreshore Redevelopment The tourism infrastructure component of the foreshore redevelopment. Total Capex est. $15–$20m	$1.8M	Daytrip: 40,000 Domestic over night: 16,765 International over night: 1,735	Output ($M): 3.326 Employment (FTE): 7 Wages ($M): 0.626 Value-added ($M): 0.199	Output ($M): 12.576 Employment (FTE): 48 Wages ($M): 3.190 Value-added ($M): 6.127	Net benefit: $14.10 M B:C ratio 7.83:1
Mandurah Outdoor & Skate Park Hall Park, Mandjar Bay foreshore, upgrade and expand the existing facility to suit a wider range of users including skating, BMX, inline skating, parkour, climbing, rope bridge/wall, small performance area, pop-up vendor area, shade shelters, BBQ & toilets	$2.5M	Daytrip: 60,000	Output ($M): 4.620 Employment (FTE): 9 Wages ($M): 0.869 Value-added ($M): 1.669	Output ($M): 9.861 Employment (FTE): 38 Wages ($M): 2.501 Value-added ($M): 4.804	Net benefit: $11.98M B:C ratio 4.79:1
Trail Bike Trail In the vicinity of Boddington – Crossman; upgrading existing areas used by trail bike enthusiasts	$0.75M	Daytrip: 9,000	Output ($M): 1.663 Employment (FTE): 3 Wages ($M): 0.261 Value-added ($M): 0.501	Output ($M): 1.479 Employment (FTE): 6 Wages ($M): .375 Value-added ($M): 0.721	Net benefit: $2.39M B:C ratio 3.19:1
Helipad In/near Mandjar Bay to facilitate tours, joy rides, events & emergencies	$0.8M	Daytrip: 7,000	Output ($M): 1.478 Employment (FTE): 3 Wages ($M): 0.278 Value-added ($M): 0.534	Output ($M): 1.15 Employment (FTE): 4 Wages ($M): 0.292 Value-added ($M): 0.561	Net benefit: $1.83M B:C ratio 2.29:1
Marine Tourism Facility Pre-planning study incorporating Dolphin Research and Information Node; viewing platform and education facility	$0.25M	Daytrip: N/A	Output ($M): N/A Employment (FTE): N/A Wages ($M): N/A Value-added ($M): N/A	Output ($M): N/A Employment (FTE): N/A Wages ($M): N/A Value-added ($M): N/A	Net benefit: $M B:C ratio N/A
Twin Marinas Mandurah For pre-planning study to validate concepts for two new marina's at the northern entrance to Peel Inlet	$0.5M	Daytrip: N/A	Output ($M): 0.803 Employment (FTE): 2 Wages ($M): 0.244 Value-added ($M): 0.410	Output ($M): 0 Employment (FTE): 0 Wages ($M): 0 Value-added ($M): 0	Net benefit: $M B:C ratio N/A

^ Expressed as ADDITIONAL visitors annually resulting from the proposed investment.

* TRA and TWA estimate that 38% of visitor expenditure can be attributed to visitor centres in the Experience Perth Region. Also, 13% of visitors to VCs increase their length of stay by an average of two nights. These ratios have been applied to the visitation numbers in order to estimate impact during operation.

Net Benefit = (construction + operational output) less capex

† Annualised Benefit-Cost ratio = Net Benefit: capex. General rule B:C > 1.0 is favourable and warrants investigation and/or support.

APPENDIX 3
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