



Department of
Primary Industries and
Regional Development



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The background of the slide is a large, vibrant image of a modern waterfront development. It features a tall, curved white building with many balconies, a long promenade with people walking, and several boats docked at a pier. The water is calm, reflecting the sky and buildings. In the top left, there is a circular inset showing a skydiver in a blue suit. In the bottom right, there is a circular inset showing a group of people dining at a restaurant with a view of a green landscape.

PEEL TOURISM INVESTMENT FRAMEWORK

March 2019

TOURISM INVESTMENT FRAMEWORK

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Churchill Consulting Pty Ltd
ABN 74 123 092 973

Level 7, 225 St Georges Terrace
Perth, WA 6000
Phone: (08) 6311 7011
Email: info@churchill.com.au
www.churchill.com.au



ACRONYMS

DPLH	Department of Planning, Lands and Heritage
DWER	Department of Water and Environmental Regulation
EOIs	Expressions of Interests
JLL	Jones Lang LaSalle
LGAs	Local Government Authorities
MAPTO	Mandurah and Peel Tourism Organisation
MoU	Memorandum of understanding
PDC	Peel Development Commission
PRLF	Peel Regional Leaders Forum
RAC	Royal Automobile Club
RDA	Regional Development Australia

ACKNOWLEDGEMENT

This document was developed in partnership between Mandurah and Peel Tourism Organisation (MAPTO) and the Peel Development Commission (PDC). The PDC acknowledges and thanks MAPTO for their contribution of expertise throughout the Framework development process.

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INTRODUCTION

The Peel Development Commission (PDC) is one of nine regional development commissions across Western Australia facilitating regional coordination, proposing growth initiatives, and providing strategic advice and recommendations, to support a thriving industry with a highly skilled workforce and strong, resilient communities. This role also includes identifying barriers and constraints to the Peel tourism industry.

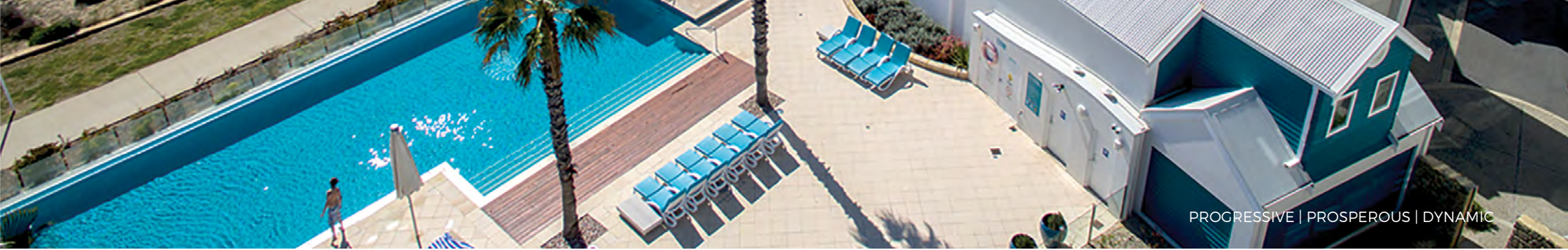
In early 2018, the PDC board identified a need for investment into the tourism industry, particularly with facilitating the growth of accommodation and product development. To help guide this growth, a Tourism Investment Framework (Framework) was required, focusing on the following key areas:

- local government approvals and zoning
- investment attraction and investor finance
- barriers and constraints associated with product development and tourism growth

The Framework outlined in this document was developed from a series of workshops with key stakeholders in the region, linking with the goals outlined in the *Peel Regional Investment Blueprint* (PDC 2015) and the *Peel Tourism Economic Development Infrastructure Strategy* (PDC 2016).

The intention of this document is to provide a robust Framework that tourism and hospitality infrastructure investors, Peel local governments and Western Australian State government agencies can use to inform analysis and decision making around tourism investment opportunities.





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VISION AND GOALS

To ensure alignment of the Framework with any existing objectives for the region, various strategic documents have been referenced and outlined below.

Country and State Tourism Goals

The Tourism Investment goal for the Peel region was aligned with the various tourism strategies for Australia and the State (see Figure 1).



Tourism Australia: Tourism 2020 Strategy	<ul style="list-style-type: none"> • Achieve \$115-\$140 billion overnight spend • Hold or grow market share in key markets • Grow labour force • Increase accommodation capacity • Increase international and domestic aviation capacity • Improve industry quality and productivity
State Government Strategy for Tourism in WA 2020	<ul style="list-style-type: none"> • By 2020 the value of tourism in WA will have doubled to \$12 billion
Tourism WA: Two- Year Action Plan for 2018-2019	<ul style="list-style-type: none"> • Drive increased share of leisure and business events markets for Western Australia
Peel Regional Investment Blueprint	<ul style="list-style-type: none"> • A network of adventures that attract visitors and enables them to engage with the Peel's natural and built attractions in a sustainable manner
Peel Tourism Economic Development Infrastructure Strategy	<ul style="list-style-type: none"> • Identify tourism investment opportunities in enabling infrastructure across Peel that will deliver strong regional economic benefits

5 x Peel Local Planning Strategies

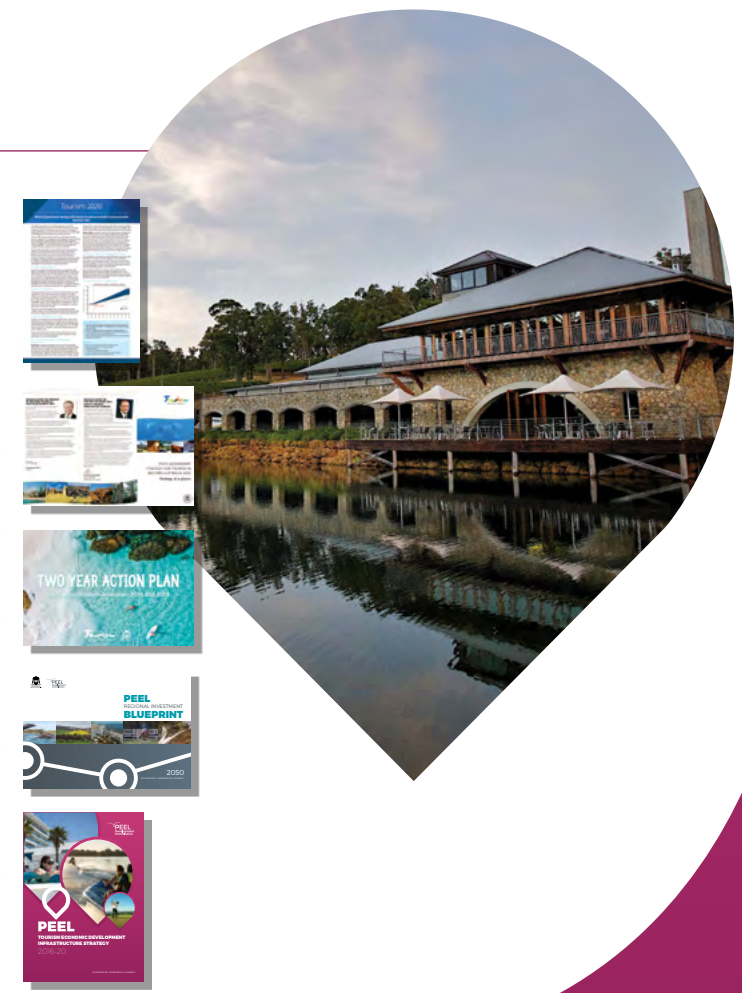


Figure 1. Country and State Tourism Goals

VISION AND GOALS CONTINUED...

Peel Regional Investment Blueprint

The *Peel Regional Investment Blueprint* (Blueprint, see Figure 2) was developed in 2015 to provide a strategic framework within which economic and regional development priorities in the Peel region can be facilitated and delivered. The Blueprint was created as a dynamic document which will evolve over time to include new economic and social drivers facing the region. The implementation of the Blueprint will be progressed by work such as this Framework.

Tourism investment goal:

A network of adventures that attract visitors and enables them to engage with the Peel's natural and built attractions in a sustainable manner.

The **key objectives** outlined in the Blueprint include:

1. Grow the Peel tourism economy through infrastructure investment and product diversification.
2. Create a network of diverse adventures which attract visitors and extends their stay.

Figure 2. Peel Regional Investment Blueprint



Peel Tourism Economic Development Infrastructure Strategy

Developed in 2016, the *Peel Tourism Economic Development Infrastructure Strategy* (Infrastructure Strategy, see Figure 3) underpins the Blueprint and sets out 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.

Tourism investment goal:

Identify tourism investment opportunities in enabling infrastructure across Peel that will deliver strong regional economic benefits.

The **key objectives** outlined in the Infrastructure Strategy include:

1. Increase year-round tourism visitation and expenditure — both day trips and overnight visitors.
2. 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.

Figure 3. Peel Tourism Economic Development Infrastructure Strategy





Current Tourism Visitor Statistics for Peel

Research conducted nationally by Tourism Research Australia – a branch within Austrade – show the following visitor figures for Peel in 2017-18:

- Day trip visitors – 2,825,000
- International annual visitors – 34,305
- International visitor nights – 578,248
- Domestic overnight visitors – 620,000
- Domestic visitor nights – 2,049,000

Future goal

A key part of developing this Framework was determining a goal that the region can work towards. In line with the broader goals and tourism investment outlined on the previous page, the PDC utilised tourism visitation goals set by the Mandurah and Peel Tourism Organisation (MAPTO), the region's tourism expertise. MAPTO's future goal for tourism visitation in the region is to achieve a 5% compound annual growth rate in the number of visitors, which will result in ~5.54 million visitors per year by 2020. Targets have been established for each of the four visitor categories. This increase is shown in Figure 4.

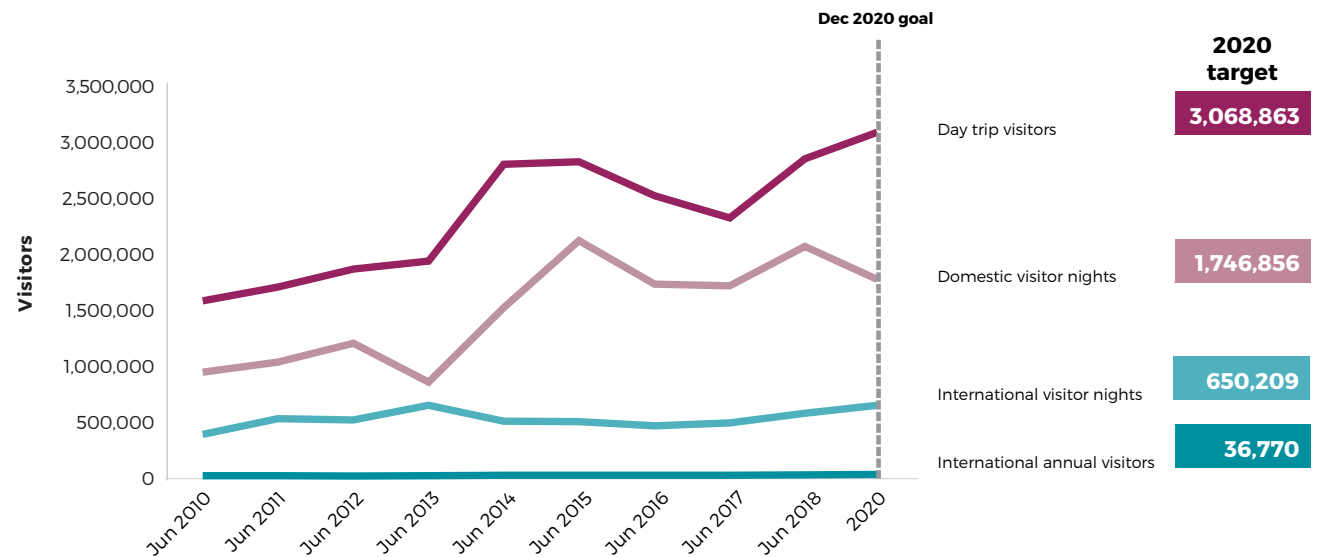


Figure 4. Visitors to the Peel region

Source: Tourism Research Australia, National and International Visitor Statistics YE June 2018

TOURISM INVESTMENT FRAMEWORK

There are a number of interrelated measures and drivers of tourism success as outlined in Figure 5. This Framework relates specifically to the **Tourism Investment segment of Tourism Drivers**.

The Framework has two key Focus Areas that align to the regions' objectives, see Figure 6.

Each component is further expanded on in the subsequent pages.

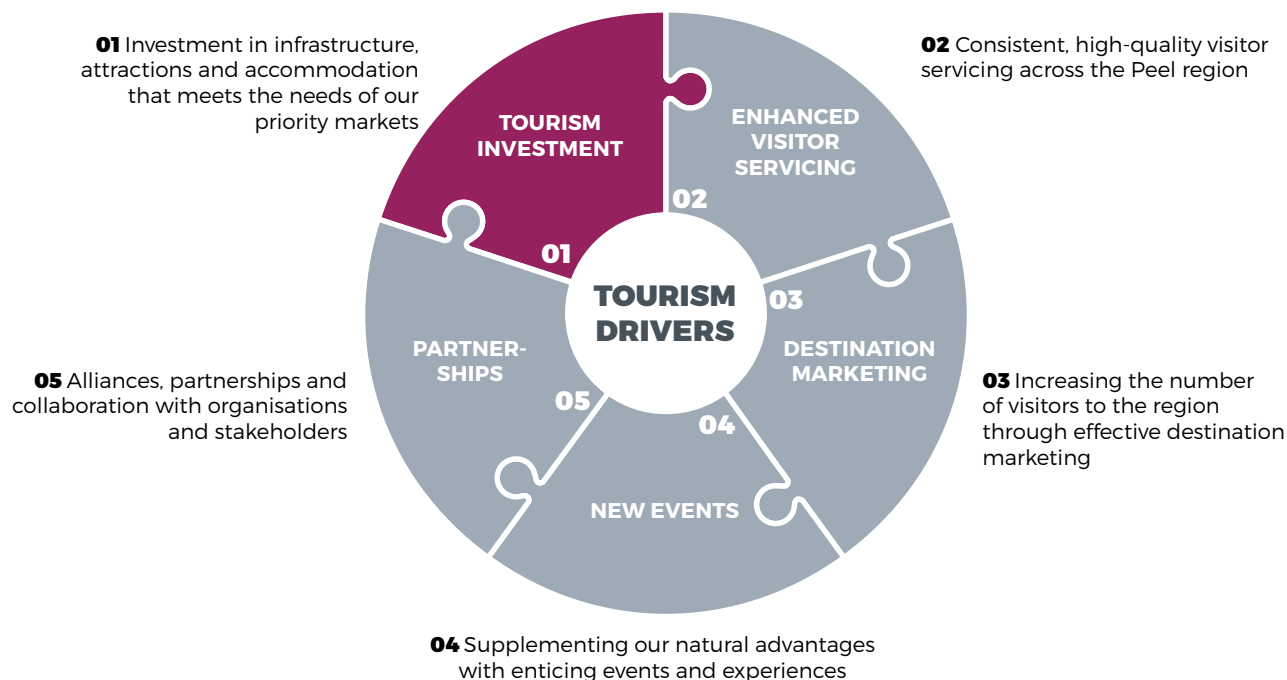


Figure 5. Tourism drivers



1

An Open for Business Model

Implementing processes, culture and technology (model) to maximise the level of investment in the Peel region

Objectives

1. **MAXIMISE** the level of tourism investment in the region.
2. **CREATE** an investment model that is regarded as the easiest to do business with in the State.
3. **ENSURE** sound balance of benefits (economic, social and environmental) to the community.

2

Shared Investment Attraction Plan

Alignment of stakeholders behind an investment plan for the Peel Region

Objectives

1. **UNITE** stakeholders behind a common tourism investment vision for the region.
2. **IDENTIFY** and drive clarity around the areas of greatest investment opportunity.
3. **ENSURE** expectations are managed in terms of areas that can and cannot be invested in.

Figure 6. Framework Focus Areas

TOURISM INVESTMENT FRAMEWORK CONTINUED...

1

An Open for Business Model

Focus Area 1: An Open for Business Model

An open for business model encompasses implementing processes, culture and technology to maximise the level of investment in the Peel region.

Objectives:

- 1. MAXIMISE** the level of tourism investment in the region.
- 2. CREATE** an investment model that is regarded as the easiest to do business with in the State.
- 3. ENSURE** sound balance of benefits (economic, social and environmental) to the community.

Recommendation	Actions	How	Owner	Priority	Timing
1.1a Align current planning and development processes, across Peel Local and State Governments that are impacting on the attraction of tourism investment.	Align current planning and development processes.	<ul style="list-style-type: none"> Review other State Government One Stop Shop examples that are working well and encourage Department of Planning, Lands and Heritage (DPLH) and Local Government Areas (LGAs) to implement successful elements. Aligns with 1.1c 	PDC	Medium	FY19-20
1.1b Implement new processes and technology that reduce the time for decisions to be made.	Implement new processes and technology.	<ul style="list-style-type: none"> Each Peel LGA to implement. 	LGAs	High	FY19-20
1.1c Monitor the State Planning Reform in progress and work with DPLH to ensure improved outcomes.	Monitor State Planning Reform.	<ul style="list-style-type: none"> DPLH Perth to communicate updates to the region and advocate regional DPLH and LGA implementation. Peel Regional Leaders Forum (PRLF) and LGAs to influence the process through DPLH Perth Office and/or Ministers. Aligns with 1.1a 	DPLH to lead PRLF and LGAs	Medium	FY20-21
1.2a Develop investment collateral to market the region to businesses, investors and developers.	Produce a Tourism Investment Prospectus.	<ul style="list-style-type: none"> Regional Development Australia (RDA) Peel to develop Regional Peel Prospectus by June 2019. PDC will revisit the list of tourism infrastructure investment opportunities from the <i>Peel Tourism Economic Development Infrastructure Strategy 2016-20</i> (Appendix 2) and feed into RDA Peel for the overall Peel Investment Prospectus. PDC, in collaboration with LGAs, will collate tourism opportunities and projects for inclusion into the Prospectus. LGAs to nominate their top three tourism opportunities/projects. Prospectus and projects to be shared with DPLH and then market tested. 	RDA Peel to develop Prospectus with input from LGAs, PDC and DPLH.	High	FY19-20



Recommendation	Actions	How	Owner	Priority	Timing
1.2b Implement a Tourism Investment Network for significant projects.	Implement a Peel Tourism Investment Network of LGAs, PDC, RDA Peel and DPLH.	<ul style="list-style-type: none"> • LGAs to lead a collaborative approvals process with DPLH and PDC: <ol style="list-style-type: none"> 1. Establish a collaborative process via an memorandum of understanding (MoU) for significant tourism projects across LGAs, PDC, RDA Peel, and DPLH. 2. Approval agency staff to share offices from time to time to facilitate collaboration. 3. Combined agency meetings to be held with tourism developers – e.g. whichever agency receives the enquiry first – invite PDC, other LGAs, and DPLH – to meet with tourism developers at the same time. Include pre-lodgement technical staff (LGA Planners, DPLH, Department of Water and Environmental Regulation (DWER)) as required, to improve efficiencies. 4. LGAs with PDC and DPLH to establish special project teams for significant developments. • LGAs to allocate Case Managers/Project Leaders to guide significant investors through the required processes. 	LGAs with PDC, DPLH and RDA Peel	High	FY19-20
1.3a Develop a Tourism Infrastructure guidance document outlining items such as:	Develop a Tourism Infrastructure Guidance document.	<ul style="list-style-type: none"> • LGAs to produce a simple flowchart outlining their approvals process, associated zoning information and contact details. • LGAs and DPLH to provide clarification to and support businesses and investors through the required processes. • Aligns with 1.2b (Network). 	LGAs and DPLH	High	FY20-21
1.3b The investment approvals that are required and details of who to contact for completion of these					
1.3c A flowchart to assist businesses and investors in negotiating various regulatory approval pathways	Leadership and attitude.	<ul style="list-style-type: none"> • Establish positive attitudes in all organisations involved in approvals processes. • Develop staff capability on how best to engage with businesses, developers and investors. • Potential to use case manager model to facilitate proponent needs and communications (relates to 1.2b Network). • Political leadership from Mayors and Presidents. • Support actions in 1.2b. 	LGAs, DPLH	High	Now

TOURISM INVESTMENT FRAMEWORK CONTINUED...

2

Shared Investment Attraction Plan

Focus Area 2: Shared Investment Attraction Plan

The shared investment attraction plan focusses on alignment of stakeholders behind an investment plan for the Peel Region.

Objectives:

- 1. UNITE** stakeholders behind a common tourism investment vision for the region.
- 2. IDENTIFY** and drive clarity around the areas of greatest investment opportunity.
- 3. ENSURE** expectations are managed in terms of areas that can and cannot be invested in.

Recommendation	Actions	How	Owner	Priority	Timing
2.1a Develop an education program on how mutual actions impact investment success for investors, existing tourism operators and government.	Develop/curate case studies showing contribution from previous successful investments to use for PR.	<ul style="list-style-type: none"> Document and share previous successful tourism developments (local success stories). Review what worked well in successful projects and adopt approach used to attract further investment. Promote, share and celebrate local tourism operators' success stories. 	LGAs	Medium	FY20-21 Post publication of the Investment Prospectus (1.2a).
	Implement a Voice of the Investor program (e.g. Activate Perth).	<ul style="list-style-type: none"> Run proactive Expressions of Interests (EOIs) and surveys to businesses and investors (aligned with tourism investment categories from the <i>Peel Tourism Economic Development Infrastructure Strategy 2016-20</i> (Appendix 2), to seek investor appetite and intent. Bring businesses and investors together to champion new developments and drive momentum. Identify target businesses and investors and connect with potential opportunities (e.g. Royal Automobile Club (RAC)). 	PDC with LGAs	High	FY19-20 Post publication of the Investment Prospectus (1.2a).
	Tourism industry gap analysis (define what is missing).	<ul style="list-style-type: none"> Produce a list of barriers that government should be addressing constraints of (e.g. public transport to tourism attractions, infrastructure and attraction of international students). 	PDC with LGAs, industry consultant	High	FY19-20

Recommendation	Actions	How	Owner	Priority	Timing
2.2b Develop actions to achieve the vision including: specialist zones, specific infrastructure attraction (e.g. caravan parks, trails, aquatic), speed of processing, floor space ratio incentives, stamp duty considerations, workforce development training, public transport and funding options.	Council investment "priority list" (informs Investment Prospectus).	<ul style="list-style-type: none"> Develop criteria for identifying investments that would add value. Consider workforce access e.g. Backpacker accommodation to attract backpacker workers into the region. 	LGAs	High	FY19-20
	Align zoning and other factors to the priority list (ensure tangible and can obtain approval).	<ul style="list-style-type: none"> LGAs to align zoning to enable Tourism Investment Prospectus projects. 	LGAs	Medium	FY20-21
	Financier bridging – getting Peel on the radar.	<ul style="list-style-type: none"> Proactive communications to banks and property advisors (e.g. CBRE, Jones Lang LaSalle (JLL), and Savills). Set long term return expectations to investors (10+ years). Links to 1.2a Investment Prospectus. 	PDC facilitates, LGAs support	Medium	FY20-21
	Establish an Economic Development Officer in DPLH.	<ul style="list-style-type: none"> PDC / LGAs to advocate for an Economic Development Officer in DPLH Mandurah, to assist businesses and developers through required processes and participate in the Peel Tourism Investment Network. 	PDC, DPLH and LGAs	High	FY19-20
2.1c Establish a mechanism for consistently measuring and reporting success for ongoing Tourism Investment approvals across the region.	Establish Key Performance Measures.	<ul style="list-style-type: none"> LGAs to establish a standardised procedure for measurement and recording of tourism investment opportunities and outcomes (e.g. development approved/ completed / did not progress, spend, type, location etc.). 	LGAs	High	FY19-20



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IMPLEMENTATION

Implementation Planning

The PDC initiated the development and generation of this Framework via a collaborative approach with key regional stakeholders. The commitment to implement the Framework was agreed by regional leaders and is now the responsibility of each allocated action owner to progress and deliver the benefits outlined in the Framework in a collaborative and coordinated fashion.

The PDC will monitor the implementation of the Framework as part of the *Peel Regional Investment Blueprint* monitoring process, to ensure it remains current and that implementation is contributing to the stretch goal for tourism of ~5.54 million visitors per year by 2020.





APPENDIX A:

STAKEHOLDER CONSULTATION

The PDC sincerely thanks the following organisations who were offered the opportunity to collaborate, contribute and provide feedback on the development of this Framework:

- Adrian Fini Group (FJM Property)
- Breakaway Tourism
- Brighthouse
- Churchill Consulting
- City of Mandurah Mayor, Elected Members and CEO
- Commonwealth Bank Australia
- Commonwealth Government Employment Facilitator
- Department of Biodiversity, Conservation and Attractions
- Department of Primary Industries and Regional Development
- Department of Planning, Lands and Heritage
- Destination Perth
- Doric Construction
- Drakesbrook Winery
- Halden Burns Pty Ltd
- LJ Hooker Mandurah
- Mandurah and Peel Tourism Organisation
- Millbrook Wine
- Minister for Local Government
- Minister MacTiernan's Office (Regional Development)
- Minister Papalia's Office (Tourism)
- Minister Saffioti's Office (Planning)
- Myhotel
- Osboine Investments
- Palmers Wine
- Peel Chamber of Commerce and Industry
- Peel Development Commission and Board
- Pharmacy Consultants Australia
- Regional Development Australia Peel
- RTH Advisors Ltd
- Seashells Resort Mandurah
- Sebel Hotel, Mandurah
- Shire of Boddington President, Elected Members and CEO
- Shire of Murray President, Elected Members and CEO
- Shire of Serpentine-Jarrahdale President, Elected Members and CEO
- Shire of Waroona President, Elected Members and CEO
- Sime Darby Australia
- South West Development Commission
- Tourism WA
- Western Australian Planning Commission
- Wheatbelt Development Commission

The full list of individual representatives consulted during the Framework development process is retained by the PDC.



Peel Development Commission

45 Mandurah Terrace (PO Box 543)
Mandurah Western Australia 6210

Phone: (08) 9535 4140

Fax: (08) 9535 2119

Email: peel@peel.wa.gov.au

www.peel.wa.gov.au

 www.facebook.com/peeldevelopmentcommission

 <https://twitter.com/peeldc>