



Department of  
Primary Industries and  
Regional Development



*We're working for  
Western Australia.*

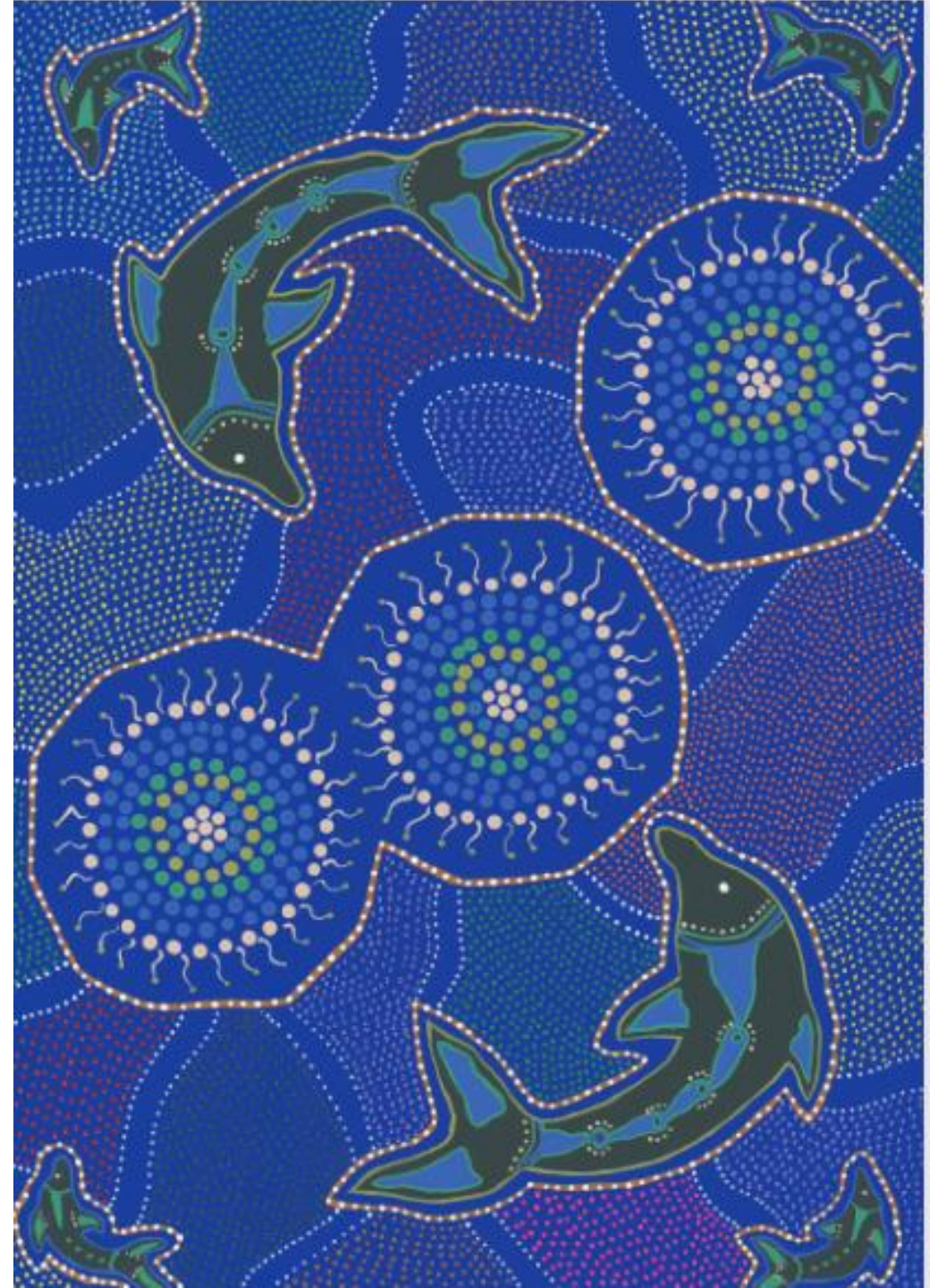
# City of Mandurah Sub-regional Economic Opportunity Analysis

*The land upon which the Peel Development Commission (PDC) operates, is on Mandjoogoordap Boodja, part of the Bindjareb Noongar Boodja and Wilman Noongar Boodja, which is part of the Noongar Nation.*

*The Noongar Nation is part of the many different Aboriginal and Torres Strait Islander Nations in the Boodja we know as Australia. We acknowledge their 50,000 years of human existence on this boodja and acknowledge their continuing connection to the boodja (land), the gabi (waters), the worl (sky) and kaadadjan (knowledge).*

*We pay respect to their cultures and their Eldership – past, present and emerging.*

Image: Dolphins Dreaming, Deborah Newenham



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Image: Visit Mandurah  
Cover image: City of Mandurah

# OVERVIEW

The need for sub-regional economic opportunities analysis (SREA) is identified within the Peel Regional Investment Framework to aid the sub-regions of Peel in promoting innovation and economic diversification, as well as meeting the needs of their growing population

The five key themes of the Framework (thriving industry, agriculture and food innovation, tourism excellence, capable people and strong & resilient communities) are particularly relevant to the development of a long-term growth strategy within the City of Mandurah given the LGA's demographic, workforce and economic trends.

At its centre, is the waterways and environmental assets which support much of the City's success and opportunity.



## **Thriving industry:**

Peel's industries and businesses are diverse and globally competitive and part of an economy that has raised incomes and living standards for all.

## **Agriculture and Food Innovation:**

Peel's agriculture and food production sectors will be enhanced through continued innovation, investment, and research.

## **Tourism Excellence:**

Peel's tourism industry and related businesses will be diverse, competitive, and sustainable creating economic growth and jobs through high-value products and services.

## **Capable People:**

Peel's workforce will be highly skilled and adaptable to structural and technological change to support an economy that is strong, diverse, and high performing.

## **Strong and Resilient Community:**

Peel's communities will be strong, vibrant, and resilient underpinned by best practice social services and infrastructure.

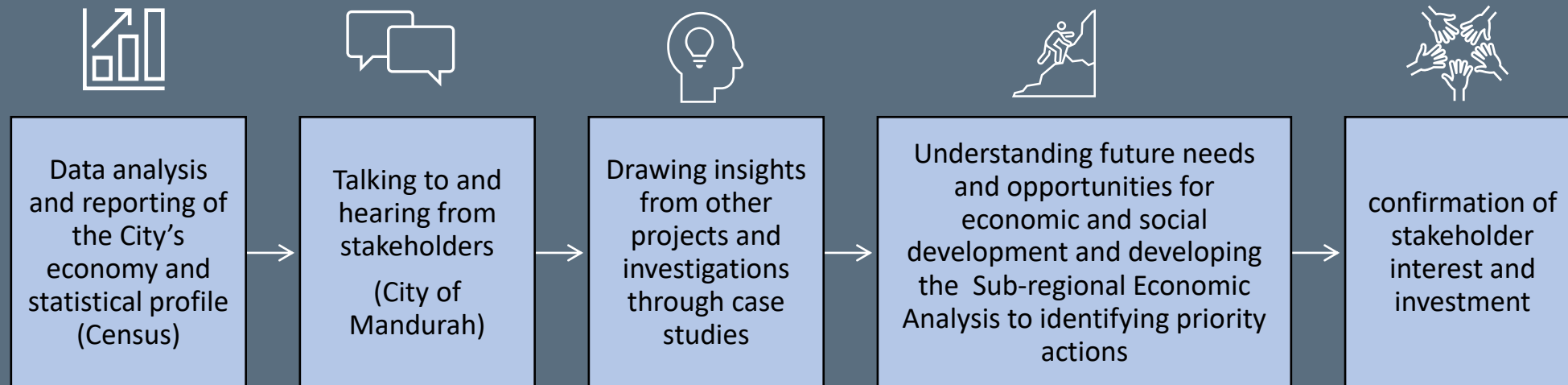
# Our Goal

Use an evidence based approach to understand changes to the demographic, workforce, economic and infrastructure profile of Mandurah to map opportunities for regional investment to ensure a thriving regional society and economy.

*Economic development is measured in terms of income and employment as well as improvements in education, health, culture, community wellbeing and the environment.*

(SGS Economics and Planning Pty Ltd 2021 )

## How we got here



# DEMOGRAPHIC DATA INSIGHTS



<p><b>Forecast Growth – 121,000 persons by 2031</b> Between 2016 and 2031, the population for the City of Mandurah is forecast to increase by 40,484 persons (50.09% increase) from 2016 (Department of Planning, Lands &amp; Heritage, 2018)), at an average annual change of 3.58%. By 2031, the City of Mandurah is forecast to reach approximately 121,300 persons.</p>	<p><b>Mandurah’s Population Growth outstrips Perth but not Peel:</b> The total population has increased by 49.77% from 2006 to 2020, representing an annual average growth rate (AAGR) of 3.55%. Population growth has remained consistent, fuelled predominantly by net internal migration and overseas migration, and to a lesser extent natural increase in population growth.</p>	<p><b>An increasingly top and bottom heavy population structure:</b> Whilst the population contains a higher proportion of older persons, there is also significant proportionate expansion in the youth/young adult cohort.</p>
<p><b>Older population remains constant:</b> The median age was 43 years for both 2006 and 2016 census periods, compared to 36 years for Greater Perth. In 2016, 22.67% of Mandurah’s population was above the age of 65.</p> <p>This is consistent with Mandurah being a seaside retirement destination.</p>	<p><b>Proportion of new residents are increasingly from overseas:</b> Overseas migration experienced an upswing in growth during the 2018-2020 period. This highlights the opportunity to embrace and leverage the skills and experience of an increasingly culturally diverse and linguistically diverse community (CALD).</p>	<p><b>Education attainment rises:</b> The City has seen rising educational attainment across all levels, particularly at the Certificate III and IV level, however it lags behind the State averages for residents with university degrees. This education profile is in alignment with the occupational structure of the Mandurah, where the dominant industries, such as Construction and Health Care and Social Assistance require at least certificate level qualifications.</p> <p>Between 2011 and 2016, the data shows an outward migration of youth aged between 20 and 24 with tertiary qualifications. By contrast, new residents in every other working age cohort are both increasing in proportion and their relative education levels.</p>

# WORKFORCE DATA INSIGHTS



<p><b>Importing talent rather than creating it:</b>          Whilst Mandurah’s education levels are slowly increasing, this movement is the result of the migration of more educated persons to the City rather than upskilling or increasing capability of local persons. Between 2011 and 2016, the data shows an outward migration of youth aged between 20 years and 24 years with tertiary qualifications.</p>	<p><b>Still a population-service driven economy:</b>          Employment growth of Mandurah residents appears driven by population-based service sectors, leaving the local economy vulnerable to economic downturns or economic disruptions when household discretionary spending contracts.</p>	<p><b>A plateaued labour force participation rate:</b>          The low labour force participation rate observed in Mandurah can be attributed to the City’s ageing and single parent population, as well as the LGA’s relatively limited job market as compared to the Perth Metro area.</p>
<p><b>Construction, Health and Retail Trade are top employers for Mandurah residents:</b>          Construction (12.62%, 3,755), Health Care and Social Assistance (12.27%, 3,649) Retail Trade (12.18%, 3,618), Mining (9.65%, 2,869), Education and Training (8.92%, 2,653) and are the five largest employment sectors for residents of Mandurah.</p> <p>The increase in employment in mining is reflective of an increase in mining activity across the State during the period and ability for Mandurah residents to participate in the drive/fly-in drive/fly-out workforce whilst enjoying the lifestyle benefits of a regional city.</p> <p>*Assessing employment by place of usual residence will identify the workforce characteristics of residents, but not necessarily the jobs available within that particular area.</p>	<p><b>Industries employing more Mandurah residents:</b> The share of Mandurah residents who work in the Mining, Education and Health Care and Social Assistance sector have increased between 2011 and 2016.</p> <ul style="list-style-type: none"> <li>• Mining had largest increase at 45.22%;</li> <li>• Health Care and Social Assistance 33.52%;</li> <li>• Education with a 25.81% increase.</li> </ul>	<p><b>Industries employing less Mandurah residents:</b>          The share of Mandurah residents who work in Manufacturing, Wholesale Trade and Construction have seen the greatest decrease between 2011 and 2016.</p> <ul style="list-style-type: none"> <li>• Manufacturing (-29.83%, -914 jobs),</li> <li>• Wholesale Trade (-13.33%, -79 jobs); and</li> <li>• Construction (-1.21%, -45 jobs)</li> </ul> <p>The loss in manufacturing is also consistent across Western Australia, indicating that there are external forces such as automation of processing and technological change which have contributed to this decline.</p>

# WORKFORCE DATA INSIGHTS continued



<p><b>Industries employing in Mandurah:</b> By industry, Retail Trade (17.99%, 3,680 jobs), Health Care and Social Assistance (17.85%, 3,652 job) and Education and Training (12.15%, 2,456 jobs) are the largest providers of jobs located within Mandurah attracting people from outside of the City.</p> <p>*Place of work data indicates the workforce characteristics of all workers in an area, providing an indication of the area's key economic drivers.</p>	<p><b>Increase in the number of jobs located within Mandurah.</b> Between 2011 and 2016 Arts and Recreation saw an increase of 41.32%, closely followed by an increase of 39.03% in the Health Care and Social Assistance sector. In addition, the Construction industry recorded an increase of 36.42%.</p>	<p><b>Self-containment but only in some industries:</b> A large proportion of Mandurah's workers (77%) both work and live in the City, with employment in Retail, Health Care and Social Assistance, and Hospitality observing relatively high levels of self-containment, indicating there is an insufficient number of workers within the City for these sectors.</p>
<p><b>Unemployment remains consistently high:</b> Unemployment in Mandurah is high at 10.8 % in 2016 when compared to the State and Peel averages for both metrics.</p> <p>In September 2021, the City of Mandurah had an estimated unemployment rate of 7% across a labour force of 35,984 persons. The Small Area Labour Markets (SALM) estimates unemployment on a smaller scale than the Australian Bureau of Statistics (ABS) Census data and is less reliable.</p>	<p><b>Youth Unemployment continues to rise:</b> Youth unemployment is consistently high and rising increasing from 8.2% in 2006, 13.4% in 2016 to approximately 20.5% in 2016.</p>	<p><b>Mining employment grows:</b> Whilst no physical mining activities take place within the City of Mandurah, proximity to Alcoa's Alumina Refinery &amp; Bauxite Mining operations, along with surrounding mines such as Newmont Gold Mine (operating from 2016) remain significant employers serviced by a drive-in-drive-out Mandurah workforce. Employment in Mining saw the largest increase in terms of workforce growth, at 45.22% between 2011-2016 reflecting a State-wide trend.</p>



# ECONOMY DATA INSIGHTS



<p><b>Economic output:</b></p> <p>The economic output of Mandurah was \$8.043 billion in 2019/2020, of which 19.7% was contributed by the Construction industry.</p>	<p><b>The output derived from Industries is uneven:</b></p> <p>There was a significant gap between the top industry (Construction) and those remaining in the economy.</p> <p>Health Care and Social Assistance, Retail, Manufacturing and Education, each contributed between 5.8% and 8.6% of Mandurah's economic output.</p>	<p><b>Specialisation in Industries favours Agriculture and Mining:</b></p> <p>City has become more specialised in Mining and Agriculture and slightly less specialised in Construction.</p> <p>This would indicate that Mandurah is benefiting from regional investment in Agriculture potentially linked to the promotion of these activities in the neighbouring LGA's of Murray and Waroona including Peel Business Park and Peel Food Zone.</p>
<p><b>Construction heavy hitter in both economic output and support for other industries:</b></p> <p>By contrast to population driven sectors, Construction requires significant resources that can be sourced from within the economy thus generating growth and associated job growth.</p> <p>*Sectors which spend the largest proportion on locally sourced intermediate goods can be seen as sectors that have a well-developed local supply chain and therefore can derive broad benefits to the region through economic multiplier expenditure.</p>	<p><b>Mandurah's key industry sectors (people services) don't locally source goods and support other local industries:</b></p> <p>Mandurah's employment base is dominated by high-value add sectors, however beyond the employees and the services they provide (human services), the industry sectors do not foster growth in inputs. Put simply they do not generate much additional purchasing of goods and services from other industry sectors within the economy.</p> <p>*Represents the value added by sectors of the economy. As an intermediate measure to Gross Regional Product, this represents the relative importance of a sector in terms of its economic contribution to the broader State economy.</p>	<p><b>A decline in the number of business overall moderated by growth in medium and larger businesses:</b></p> <p>Sole traders declined from 2006 to 2016 from 39% to 31%, whilst businesses between 1 and 19 employees have increased from 55% to 60%. Businesses with 20+ employees have risen steadily from 4% in 2006 to 5.5% in 2011 and finally to 7.67% in 2016.</p> <p><b>Arts and Recreation and professional services to be more prominent in the future:</b></p> <p>Two industries which are expected to be a future focus of the Mandurah economy are Professional Services and Arts and Recreation services. While neither of these industries have high location quotients in 2016, there are planned infrastructure projects which are expected to have future impact on their importance.</p>

# INFRASTRUCTURE INSIGHTS



<p><b>One new Primary School</b></p> <p>There are now a total of 24 schools in the City, with growth in the City’s northern suburbs prompting the construction of a <b>new primary school</b> at Madora Bay Primary School to be completed by 2023.</p>	<p><b>TAFE expands with new training centre</b></p> <p>Current expansion of the South Metropolitan TAFE campus to include a <b>hair and beauty training facility and co-located hospitality and tourism training centre</b>. The project will also benefit the broader community by providing a low-cost hub for the public to access these services whilst supporting student’s learning environment.</p>	<p><b>Investment in Peel Health Campus</b></p> <p>Currently health and social assistance services are generalised and overstretched. The commitment to a \$152 million <b>redevelopment and expansion</b> of the Peel Health Campus will see a significant lift in the capability and capacity of the public health infrastructure including Emergency Department available in the region.</p>
<p><b>Train related infrastructure</b></p> <p>The addition of a new train station at Lakelands in 2023 as well as the recent completion of the multi-storey car park at Mandurah station will provide residents additional transport options and ease pressure on the City.</p>	<p><b>Utilities hold back the regeneration of Mandurah suburbs</b></p> <p>Advocating for the advancement of the Water Corporation’s <b>infill sewerage program</b> in the areas of Falcon, Halls Head and Dawesville areas would enable timely redevelopment of these older suburbs, transition towards a mixture of housing options as well as address the land contamination impacts of discharge along the City’s sensitive coastal environment.</p>	<p><b>Confirming the City Centre</b></p> <p>The City has concentrated efforts to facilitate greater youth engagement through targeted infrastructure such as the Mandurah Skate Park and Circular Estuary Pool including <b>scheduling events</b> to promote use and broader community participation. The two sites form important components of the Mandurah Foreshore Redevelopment aiding to <b>link the east and west sides of the estuary reaffirming the Mandurah Town Centre</b>.</p>

# PROPOSED INITIATIVES

This Sub-Regional Economic Analysis identifies several pathways for regional stakeholders to balance approaches to consolidating and building on existing industries and whilst also diversify Mandurah's economy and facilitating key supporting infrastructure.

Alongside this analysis the City of Mandurah and Peel Development Commission are undertaking a joint Transform Mandurah initiative to investigate the socio-economic case for a large-scale intervention to change the socio-economic trajectory of Mandurah.

The initiative involves independent research into the challenges and opportunities and investigation of intervention options. The proposed initiative pathways identified in the following tables are therefore to be considered by stakeholders for progression in conjunction with the findings of the Transform Mandurah investigation initiative.





Thriving Industry



**Thriving industry:**  
Peel's industries and businesses are diverse and globally competitive and part of an economy that has raised incomes and living standards for all.

**Data insights from SREA Report**

- The economic output of Mandurah was \$8.043 billion in 2019/2020, of which 19.7% was contributed by the Construction industry.
- Business's with 20+ employees have risen steadily from 4% in 2006 to 5.5% in 2011 and finally to 7.67% in 2016.
- Mandurah's employment base is dominated by high-value add sectors, however beyond the employees and the services they provide (human services), the industry sectors do not foster growth in inputs.

**Action area**

**Why it's important**

**Opportunities** (recommended and subject to confirmation of stakeholder interest and investment)

Leadership in Industry transition to Net Zero.

A technology based approach to reduce emissions provides Australia with a pathway to net zero by 2050 that protects and strengthens our economy.

- **Mandurah/Peel Hydrogen Transport Hub** (heavy vehicle refuelling facility) located in the City, which would integrate Mandurah into the wider hydrogen energy network along with incentives to encourage adoption with a focus on industries with back-to-base transport fleets.
- Examine scaling and business relocation opportunities to better support the development of **niche industrial clusters**, e.g. Hydrogen Innovation Precinct at Peel Business Park, Food Technology at Peel Business Park (in Shire of Murray), General Industry (at Pinjarra) and Warehousing in Mandurah.
- In coordination with the Perth and Peel Hydrogen Cluster investigate, **via feasibility and business case**, the opportunity to develop a **Hydrogen Innovation Precinct** including assessment of potential sites within proximity to Mandurah.

Building on Mandurah's competitive advantage and natural assets.

Creativity, inspiration, culture – all are important elements to a productive and competitive economy. Economic development initiatives must encourage local enterprise creation and growth and identify and cultivate unique intersections of knowledge, talent and skills amongst the region's strategic industries that enhance the region's competitive advantages.

- Development of the **Australian Waterways Centre for Excellence (AWCE)**, including community development, conservation and educational opportunities and. Encourage local businesses and institutions relevant to water innovation to co-locate at the Centre.
- **Specialised health sector development** where Mandurah has specialised knowledge and a competitive advantage to extend on that knowledge (e.g. Potentially telehealth, medical research, cancer treatment, specialised surgery, rehabilitation, addiction treatment, psychiatric medicine).

Consolidation of the Mandurah City Centre.

To attract exceptional talent, Mandurah must continue to drive transformational economic development projects that position the City Centre as a great place to live and work.

- Activation of town centre for commercial development through a **review of the Mandurah City Centre Precinct Plan**.
- The attraction of industry with associated professional services (i.e. call centres) or **government co-location hub** to utilise new office space and develop Mandurah as a key southern metropolitan professional services hub.
- Finalise and begin implementation of the **Transform Mandurah Strategy**.
- Continued support of local businesses to enhance their capacity and capability to support private and government sectors through initiatives such as the **Local Content program and the Small Business Advisory Service**.



Tourism Excellence



**Tourism Excellence:**  
 Peel's tourism industry and related businesses will be diverse, competitive, and sustainable creating economic growth and jobs through high-value products and services.

**Data insights from SREA Report**

- Retail Trade (12.18%, 3,618) is one of Mandurah's top five (5) employment sectors.
- Between 2011 and 2016 Arts and Recreation job numbers saw an increase of 41.32%.
- Arts and Recreation and professional services to be more prominent in the future - two industries which are expected to be a future focus of the Mandurah economy are Professional Services and Arts and Recreation services. While neither of these industries have high location quotients in 2016, there are planned infrastructure projects which are expected to have future impact on their importance.

Action area	Why it's important	Initiatives (recommended and subject to confirmation of stakeholder interest and investment)
<p>Celebrating cultural heritage and sharing stories.</p> <p>More than just a day trip destination</p>	<p>Sharing stories is fundamental to the way we can connect as humans. Stories preserve culture and pass on cultural knowledge from one generation to another helping to form deep connection to place and each other.</p> <p>Length of stay is largely determined by the socio-demographic profile of the visitor and the perception of the characteristics of a destination. Ensuring a sufficient diversity and quantity of attractions aligned with visitor cohorts that are likely to staying longer in Mandurah will deliver the higher economic return to the local economy.</p>	<ul style="list-style-type: none"> <li>• Collaborate with Indigenous population to develop a cultural tourism program - potential to incorporate an Indigenous cultural centre into existing infrastructure such as Mandurah Performing Arts Centre or new infrastructure such as Yalgorup trails or AWCE.</li> <li>• Sailing adventures linked to Perth and Port Geographe in multi-day trips.</li> <li>• <b>Eastern Foreshore North Boardwalk Precinct development</b></li> <li>• <b>Eastern Foreshore South Precinct</b></li> <li>• Implement the <b>Trolls in WA</b> project increasing Mandurah's visitation.</li> <li>• Undertake <b>feasibility</b> into the development of infrastructure to support visitation to the Thrombolites.</li> </ul>
<p>Leveraging the Regions environmental assets</p>	<p>Preservation and promotion of environmental and cultural attributes that are unique to Mandurah offer visitors a point of difference. Environment based tourism can raise awareness of cultural and environmental values, and direct tourism revenue to address important environmental challenges in Mandurah.</p>	<ul style="list-style-type: none"> <li>• Yalgorup Trails and Thrombolites experiences and eco-tourism development.</li> <li>• Peel aspiring <b>Geopark</b> and <b>Geotourism</b> initiatives will increase visitation.</li> </ul>



Capable People





### Capable People:

Peel's workforce will be highly skilled and adaptable to structural and technological change to support an economy that is strong, diverse, and high performing.

### Data insights from SREA Report

- Rising educational attainment across all levels, particularly at the Certificate III and IV level.
- Mandurah is attracting talent from Greater Perth rather than creating talent in existing Mandurah residents.
- High unemployment and particularly high youth unemployment.
- Overseas migration experienced an upswing in growth during the 2018-2020 period. This highlights the opportunity to embrace and leverage the skills and experience of an increasingly culturally diverse and linguistically diverse community (CALD).

Source: Census data 2011, 2016

## Action area

## Why it's important

## Initiatives (recommended and subject to confirmation of stakeholder interest and investment)

Early intervention and support for children

Peel must continue to drive transformation within early education to ensure that developmental learning milestones are reached consistent with children in Greater Perth.

- **Early interventions** and support for pre-kindergarten and primary school aged residents to raise literacy and numeracy.
- Review and update City of Mandurah's **Early Childhood Strategy 2012-2016**.

Raising local aspiration, engagement and attainment

Balancing attracting talent to the region with building the capacity of existing human capital pools, will ensure there is local opportunity and career pathways. To build exceptional talent that is capable of engaging in the emerging professional industries, Mandurah must support students as they transition into through and into higher and tertiary education. To do this, the profile of Mandurah must include professional industries and industry sectors which require high skill levels, with tangible links to fostering and harnessing local talent.

- Delinking of equity based financial assistance with a focus on merit based and **employment linked scholarships**, and **citizenship/curricular aligned internships** in emerging industries and high skill professions with direct employment pathways.
- Tertiary Education Regional **Learning Hub**.
- Building partnerships with **Children's University Program**.

Promote inclusive opportunities for participation in the workforce

High workforce participation is important to providing opportunity and equality to all of Mandurah's residents. Increasing women's, youth and immigrant workforce participation will enable better living standards for individuals and families, improve the productivity of businesses and will drive economic growth. To do this, the profile of Mandurah must strengthen industries that support a range of skills levels, gender opportunities, responds to niche skills (culturally and linguistically diverse) and support a balanced and diverse workforce.

- Develop partnerships between schools and key industries in Mandurah to provide direct **career pathways**.
- Hosting **local employment forums** to connect job seekers with employers and upskilling opportunities.
- A focus on **specialisation alongside diversification** – Pursuing innovation within existing industries where Mandurah has a competitive advantage and/or where there is potential for a 'balanced' workforce. (i.e. Health and Social Assistance sector specialise in medical research).

Cultivate entrepreneurial spirit and ecosystem

Creativity, inspiration, culture – all are important elements to a productive and competitive economy. Economic development initiatives must encourage local enterprise creation and growth and identify and cultivate unique intersections of knowledge, talent and skills amongst the region's strategic industries that enhance the region's competitive advantages.

- **Enhance educational opportunities** that support key industries in Peel, with a focus on businesses established in the City Centre (Transform Mandurah) and within close proximity to Mandurah (Peel Business Park).
- **Australian Waterways Centre of Excellence** - celebrating Mandurah's environmental attributes and opportunities for the migration of highly skilled individuals.



# Strong and Resilient Communities



**Strong and Resilient Community:**  
Peel's communities will be strong, vibrant, and resilient underpinned by best practice social services and infrastructure.

#### Data insights from SREA Report

- Compared to both Peel and WA, Mandurah has a higher proportion of residents above the age of 65+ and an average age of 43 years.
- SEIFA index: 983, lower than benchmark regions across Australia.
- Region are at a social-educational disadvantage compared to the Australian average.
- In 2016, the unemployment rate stood at 8.3% throughout the Peel Region compared to 7.8% for WA in 2016.
- Population growth in Mandurah predominantly occurs through net internal migration.

Source: Census data 2011, 2016

### Action area

### Why it's important

Cross organisational collaboration, early intervention and coordinated support for communities.

Communities and individuals who are isolated or prevented by systems and entrenched cycles of disadvantage must not be left behind as the region seeks to realise it's economic aspirations. Working together to understand and align services across the Region will be critical for building a strong community that wants to stay, live and work in the region.

Holistic community health and wellbeing teamed with social and physical Infrastructure.

Population health and wellbeing is important to the sustainability of a liveable, safe and resilient Mandurah community and a strong economy where everyone can contribute to their fullest potential. Understanding that socio-economic disadvantage affects a proportion of Mandurah's residents, activities should focus on priority populations that have the most to benefit most from health and wellbeing related support services.

Secure housing to ensure stable families and equal opportunity

Access to safe, secure and quality affordable housing is essential to the wellbeing of communities. With respect to all households, there is the identified need to facilitate the development of affordable and accessible quality housing that is the 'right size/fit' for its occupants, particularly those of seniors, young adults and single persons as household size, composition and individual needs change over time. Partnering with the Community, Not-For-Profit and Government Sector can build the knowledge and capability of the City's construction industry and the broader acceptance of new housing models within the community.

### Initiatives (recommended and subject to confirmation of stakeholder interest and investment)

- Establishment of a **Family Support Network (FSN) and District Leadership Group (DLG)** within the region to drive a collaborative approach to service provision through partnership with the social service sector.
- Delivery of the **Peel Away the Mask III report** and action plan.
- \$152 million investment in **Peel Health Campus** by the state government.
- Update of **Public Health Plan 2020-2023** in the medium term.
- **Co-location** of existing and new service delivery agencies, streamlining services and facilitating a collaborative approach to service provision.
- Secure investment in **Peel Health Hub 2.0** to further support women, children and their families in the Peel region
- Development of a **new transport hub** in the city centre, with \$15 million funding requested from the Federal Government.
- **Local scale Transport Plan** in acknowledgement of the Lakelands Train Station completion.
- Development of the **Dawesville Community Centre**.
- Undertake a **City led design charette** to test development models for underutilised land for social/affordable housing both in LGA ownership and Community Sector.
- Development of a **Common Ground facility** at 81-87A Allnutt Street, Mandurah, which provides long term housing and services to persons experiencing or at risk of experiencing homeless and/or on low incomes.
- Provide public resources to aid residents in making informed decisions around **liveable/universal design housing**, and consider partnership approach with construction industry/local developers to deliver sustainable, affordable, intergenerational and/or universal design housing as **demonstration projects/display homes**.

# Case Studies

## Opportunity

The waterways are central to local community values, being significant to the local lifestyle, economy and are synonymous with the Peel region. Development of an Australian Waterways Centre of Excellence has the potential to support broad monitoring and interventions, raise the profile of the natural asset and the management approach and bring about innovations in management through enabling connections.

### Case study 1: Institute for Marine and Antarctic Studies (IMAS): Hobart

The Institute for Marine and Antarctic Studies in Hobart is an example of how to successfully create an innovation hub related to environmental sciences. The hub was announced in 2009/10 as a purpose-built facility for marine and Antarctic sciences in Hobart with **\$45 million funding from the federal government Australian Government Capital Grants Program (CGP)**. The site was established by the **University of Tasmania in conjunction with CSIRO and Australian Antarctic Division**. Prior to the built infrastructure Hobart had a strong existing marine and Antarctic sciences industry, the development of the IMAS enabled the co-location of dispersed agencies and businesses into a co-operative research space.

The IMAS hub is located at Princes Wharf No. 2 Shed, on the Hobart waterfront, adjacent to the CSIRO Marine and Atmospheric Research Centre providing a central location for all the combined institutions. IMAS has become the highest performing research institute of the University of Tasmania. IMAS has built a critical concentration of internationally recognised scientific expertise and leadership; and established enduring partnerships with government, industry and peer institutions around the globe.

**Since 2010, IMAS has tripled in size. With a current annual budget of \$50 million, IMAS houses 190 staff, and 185 PhD students at three locations across Tasmania, with state-of-the-art research and teaching facilities.**

The concept of an Australian Waterways Centre of Excellence (AWCE) in Mandurah proposes a similar function, gathering the previously dispersed industry for water technologies that has organically developed within Mandurah. This includes the 140 PHD students who operate in the area annually; a Murdoch University research group; a natural resource management organisation; and water related government services.



Image (top): University of Tasmania  
Image (left): Research for Agriculture  
Image (right): IMAS  
Image (bottom and right ): Visit Mandurah; PIWI

# Case Studies

## Case Study 2: Hobson Bay Wetland Centre – Environmental Research and Eco-Tourism facility: Victoria, Australia

The Hobson Bay Wetland Centre will be constructed on a 420ha internationally significant regenerated wetland (former saltworks) site in Altona Meadows Victoria.

Blessed with several **distinct ecosystems** including significant marine areas, wetlands (including the Ramsar listed Cheetham Wetlands), and coastal parks along with five waterways, the site provides habitat to a diversity of plant and wildlife, including many rare and threatened species and migratory birds.

With a commitment from the **State Government of \$16 million (Victorian Government 2022)**, the Centre is intended to incorporate environmental field studies centre (research facilities), classrooms, community spaces, eco-tourism visitors centre and café and will complement installation of boardwalks, connected walking trails, interpretive displays, nature play zones and predator proof fencing in critical locations. It will ultimately support the implementation of national, state and local strategies aimed at protecting and restoring the natural environment as well as promoting community education, health and wellbeing through connection to the natural environment.

*“[Once built the] design vision celebrates this significant setting through a proposal that incorporates regenerative, climate resilient and biophilic design principles within a range of facilities and services oriented towards the needs of health and recreation, and natural environment education, research and conservation.*

*Considered visitor journey experiences and connections throughout the site celebrate the landscape as the primary element, while the architecture of the proposed Visitors Centre, Lookout Platform and Research Cluster, support this approach and the transformation of the site into an economically beneficial eco-tourism destination for Melbourne’s west. (Grimshaw 2022)*

The Hobson Bay Wetland Centre provides an example of what could be achieved through projects like Mandurah’s potential **Australian Waterways Centre of Excellence** recommended in the Mandurah Sub Regional Economic Analysis and Transform Mandurah. A similar project in Mandurah would align with the *Mandurah Biodiversity Strategy 2013* protection and retention targets and strengthen the connection between biodiversity and land use planning by providing a centralised facility to coordinate eco-tourism and community participation in conservation.



Images (top and left): Grimshaw Architects  
Image (bottom and right): Visit Mandurah

# Case Studies



Image: The University of Mississippi Medical Centre

## Opportunity

Building on the momentum of telehealth, there is the opportunity for regional locations like Mandurah to specialise in the delivery of telehealth services. This will allow Mandurah to better support their immediate community and potentially become leaders in the continued adoption and evolution of online health services and digital platforms for medical centres and practitioners in other regions.

### Case study 1: Telehealth Centre and Centre of Excellence

The 'Center for Telehealth' and 'Telehealth Centre for Excellence' in Mississippi form part of the University of Mississippi Medical Centre. Both are examples of a public academic medical centres where practitioners work whilst concurrently taking part in research to test, explore, demonstrate and advocate for innovative ways to advance the modern practice of telemedicine.

*"The goal of the Centre of Excellence is to develop the tools, resources and best-practice know-how to sustainably expand the emerging industry and support practitioners and medical clinic around the country in their adoption and use of telehealth platforms."*

*Since its inception in 2003, the Telehealth Centre for Excellence in Mississippi has become one of two leading telehealth research facilities in the USA and continues to inform the model for national telehealth expansion which now includes over 200 telehealth sites"*

Similar to the Mississippi model, Australia's Digital Health Cooperative Research Centre located in South Australia, joins participants (consumers/providers), academia, industry and government to accelerate the implementation of digital health technologies, underpinned by evidence-based research . The DHCRC was awarded a **\$55 million contribution from the Commonwealth Department of Industry, Science and Technology** given its potential to lead digital health innovation and commercialisation, create long term sustainable jobs and attract talent within the health and digital economy.

As Australia continues to adopt telehealth platforms, there is the opportunity for Mandurah to **leverage its competitive advantage in the delivery of health services and social assistance** to lead the development of the sector by adopting a similar Centre of Excellence in Telehealth model and complementing South Australia's Digital Health CRC. A Mandurah Telehealth Centre for Excellence associated with Murdoch University and the Peel Health Campus/Hub has the potential to facilitate local industry specialisation, improve the delivery of health services within the Peel region and create sustainable jobs in medicine, preventative medicine, aged care and language interpreter services.

# Case Studies

## Opportunity

The Transform Mandurah program has identified a priority to increase Professional Services employment in the area facilitated by increasing availability of premium office space within the CBD, creating a Government services southern employment hub and clustering of existing research centres, science-based industry and tech companies.

## Case study 1: Regional customer operations hubs (call centres) - Morwell Innovation Centre at heart of Gippsland Hi-Tech Precinct; Gippsland

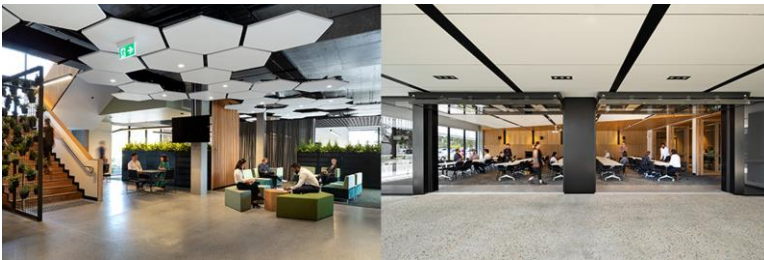
The reshoring of customer operations hubs (call centres) back to Australia presents the opportunity for regional locations such as Mandurah to potentially create hundreds of jobs, revitalise regional centres and improve opportunities for residents requiring flexible working arrangements.

In the past year, several large companies have made a commitment to using either Australian contact centres and/or returning their own call centres to Australia including Serco, Westpac, Telstra and Alinta Energy .

Alinta Energy will become a **key tenant in a new \$17 million government funded Innovation Centre located in Morwell** in the Latrobe Valley just **90 minutes from Melbourne** (opened 2020) . The relocation is anticipated to secure a further **230 jobs for Morwell**. The opportunity was made possible through the Government's Investment Attraction and Jobs Victoria program and the *\$40 million Latrobe Valley Economic Development Program* resulting in the Gippsland Hightech Precinct underpinned by high-speed broadband digital connectivity, which has seen the customer operations return to Australia from the Philippines.

The Innovation Centre will act as a business incubator for new product development, providing support to start ups. The Innovation Centre is just one part of the broader High-Tech Precinct Gippsland which will virtually and physically bring together partners from across private sector industry, government, higher education and research.

Mandurah shares many of the physical and social attributes of Morwell, including proximity to the CBD, dominance of a few industries (construction, health and mining related employment) as well as opportunity to revitalise its the city centre. The High-Tech Precinct Gippsland, with the Morwell Innovation Centre development at its heart, provides a multi-tiered model for how State Government and Local Government could work together to attract private investment partnerships with the capability to diversify the Region's economy and facilitate the development of professional and high skilled workforce without relying on a Government services southern employment hub as a catalyst.



Images: Hightech Gippsland

# What's Next

Leveraging information highlighted in this Sub-Regional Economic Analysis, case study examples and the goals of local, regional and State strategies has allowed for the identification of currently proposed and future potential initiatives for the City of Mandurah and associated stakeholders to implement, in accordance with the themes of the Peel Framework. These reflect the goals and intent of existing plans and strategies yet provide additional pathways to local economic growth and diversification that supplement key actions already committed by the private sector, the City of Mandurah and State government.

These opportunities represent proactive steps that may be taken within the City to ensure its economic diversification is successful in the long-term in alignment with the overarching goals for the future of the wider Peel.

The Peel Development Commission intends to support stakeholders in delivering the outcomes of these initiatives to progress the wider economic development of the Peel as a whole. The Commission can aid in the facilitation of these initiatives through advocacy, access to State government networks and existing private sector relationships, grant funding, as well as policy support, particularly in key areas of interest where the goals of Mandurah and Commission align. Ongoing co-operation between the Commission and regional stakeholders is critical to ensuring the success of the initiatives identified in this Sub-Regional Economic Analysis as part of a regionally led process, maximising opportunities for collaboration and value-add across the wider region.

The complete Subregional Economic Analysis can be found on the Peel Development Commission website.

[Download the report](#)

