

Pickering Brook and Surrounds

Perth Hills Tourism Product Gap Analysis

March 2020 | 19-246

element.
the art and science of place

We acknowledge the custodians of this land, the Whadjuk Noongar and their Elders past, present and emerging. We wish to acknowledge and respect their continuing culture and the contribution they make to the life of this city and this region.

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1. Project overview

The state government, through the Department of Planning, Lands and Heritage, is developing a Sustainability and Tourism Strategy for Pickering Brook and surrounds. This will provide strategic planning guidance for tourism-related growth and development within a portion of the wider Perth Hills area. The study area is shown in Figure 1.

The wider Perth Hills area incorporates the area of the Darling Scarp from Gidgegannup in the north, Jarrahdale in the south, the eastern boundaries of the City of Swan (excluding Swan Valley), Shire of Mundaring, City of Kalamunda, City of Armadale and Shire of Serpentine Jarrahdale to the east and the foothills to the west. Tourism is recognised as a key growth industry for the Perth Hills which has a unique competitive advantage, being located a 30-45 minute drive from popular destinations across the Perth metropolitan area. Leveraging its proximity to support and strengthen the tourism industry, improve visitation and dispersal, and grow and diversify the product offer is a key focus.

To date, the Perth Hills's tourism offer has organically grown, partly due to increasing population and expansion of business / service sectors within the study area.

In consideration of future growth, it is important to understand 'current state' context, gaps and opportunities that will enable extension of the current product offer, as well as diversification and development of new products / experiences to strengthen investment.

A Project Task Force and Project Working Group has been established to guide the Pickering Brook and Surrounds Sustainability and Tourism Strategy (PBSSTS), with representation from the Western Australian Planning Commission (WAPC), relevant State government agencies and the cities of Kalamunda and Armadale. The group will engage with the Perth Hills Tourism Alliance (PHTA), which has been established to provide coordinated tourism marketing for the wider Perth Hills, in alignment with Regional Tourism Organisation (RTO) Destination Perth and Tourism Western Australia (Tourism WA). Tourism WA has commissioned this Perth Hills Tourism Gap Analysis which will be an informing document for the PBSSTS.

Study objectives:

1. Determine gaps and opportunities for future tourism product development in the Perth Hills, to complement and add value to the current offer
2. Understand trends influencing tourism product development in areas such as trails (food, wine, cycling, bridle), food and beverage, boutique accommodation, cultural tourism, soft adventure and agritourism
3. Identify potential regulatory, planning, infrastructure or economic barriers and how to address these to facilitate tourism development, and economic and social revitalisation of Pickering Brook and surrounds
4. Undertake stakeholder engagement and consultation to inform the gap analysis



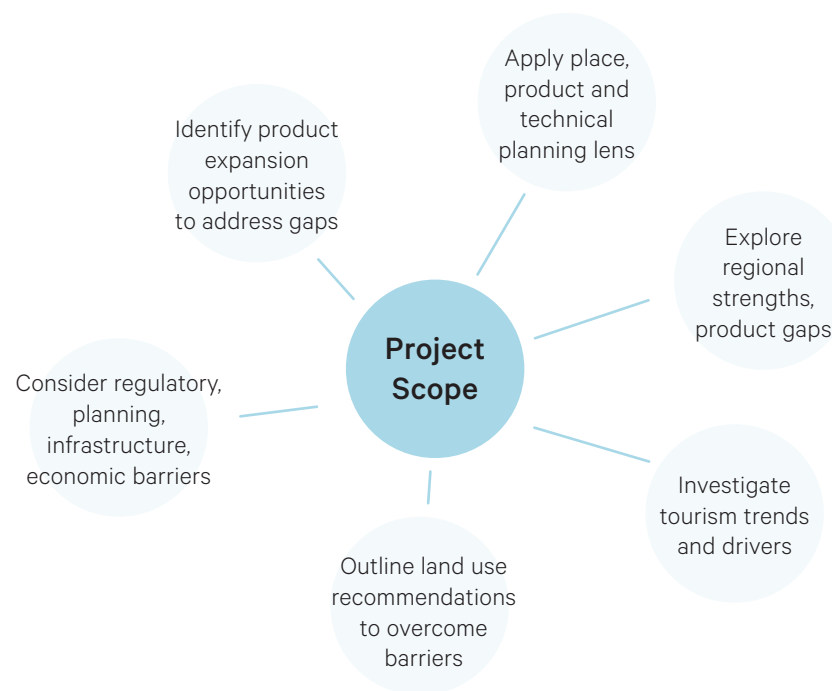
Tourism contributes **\$11.8 billion** to the State's economy by Gross State Product and employs **104,000 people**



The residential population across the five Perth Hills LGAs is forecast to **grow by 14%** in the four years from 2017 (354,288) to 2021 (404,196).
(Source: Id Forecast)

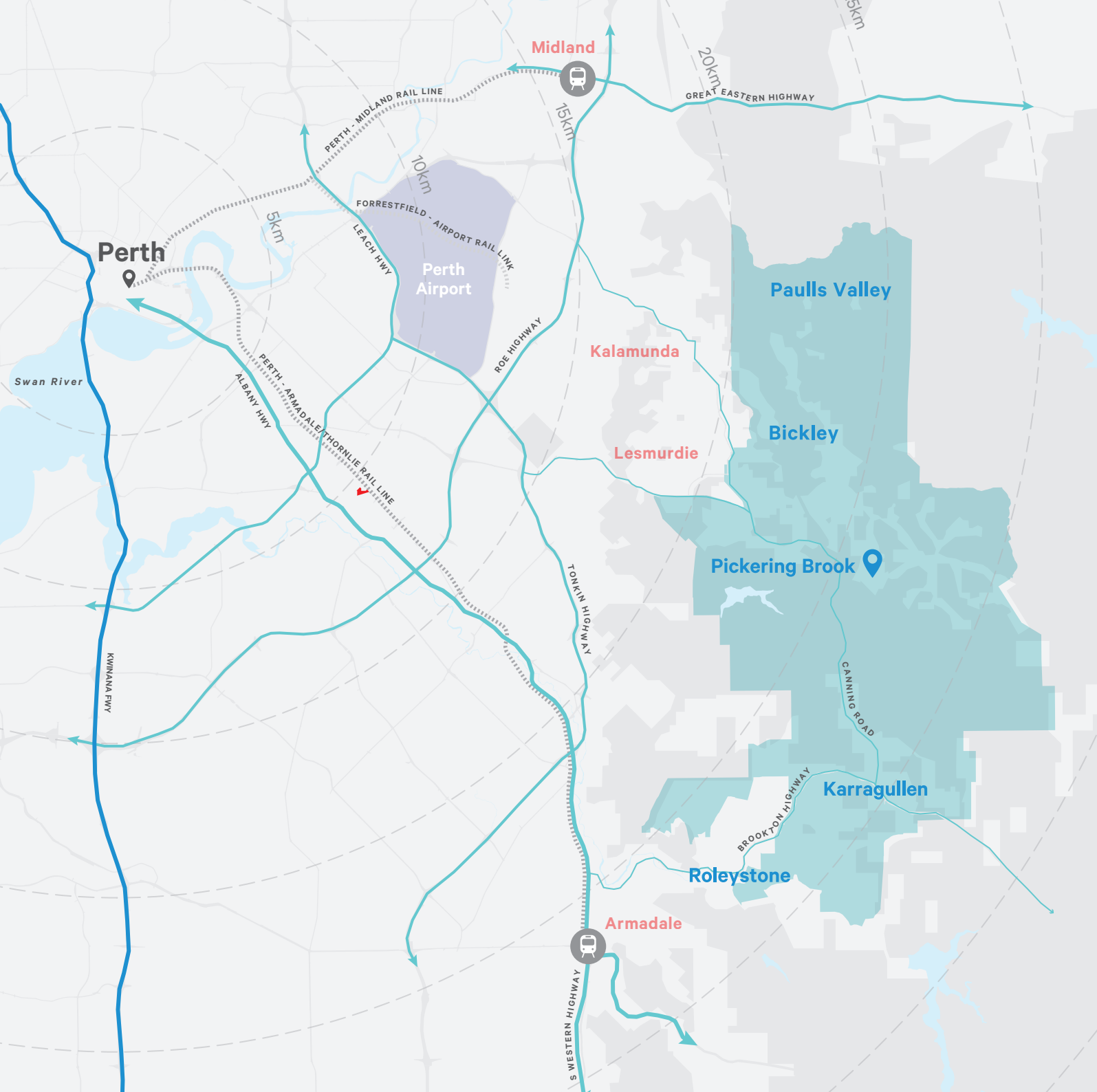
There is a unique opportunity to strengthen the local tourism industry which has come about due to:

- Improved attractiveness of Perth as a visitor destination – new stadiums, theatres, city precincts and attractions
- Direct access to the Perth Hills from the metropolitan area via major road networks, and future rail links
- Easy access to domestic and international airports, including completion of Forrestfield Airport Link in 2021
- Availability of thousands of new hotel rooms in Perth
- Normalisation of the Australian dollar



Project Method

1. Context Analysis	2. Stakeholder Consultation and Research	3. Gap Audit and Opportunity Identification	4. Draft and Final Report
<ul style="list-style-type: none"> • Literature review (see Appendix 1) • Site visit • Current State Framework • Trends analysis (see Appendix 2) • Consideration of planning, land use, environmental drivers 	<ul style="list-style-type: none"> • Workshops – government and business • Interviews, one-to-one meetings • Updated Current State Framework 	<ul style="list-style-type: none"> • Gaps and opportunities matrix • Product development scenarios and enabling statutory planning tools • Draft gap analysis and recommended strategies 	<ul style="list-style-type: none"> • Draft report development • Feedback and review • Final report delivery



2. Study area

The study area is located 20-25 kilometres from Perth and is more than 20km long, spanning two local government areas between Kalamunda and Armadale.

It is easily accessible by the major road network – Albany, Tonkin, Great Eastern and Roe highways and Canning Road and is within approximately 10 kilometres of Perth airport. It can currently be reached via short drive from Armadale train station and, in the future, via the Forrestfield train station.

Figure 1. City Context Plan (element, 2019)

The study area is characterised by:

- National Parks (Helena, Midgegooroo, Korung and Kalamunda), dense bushland and large areas of State Forrest; this influences the visitor movement network and connectivity
- A 'satellite' development pattern which has formed from historical development of fertile valley soils for agriculture
- The Pickering Brook townsite which is centrally located within the study area
- Limited key road connections (internal to the study area); many present as 'no through roads'

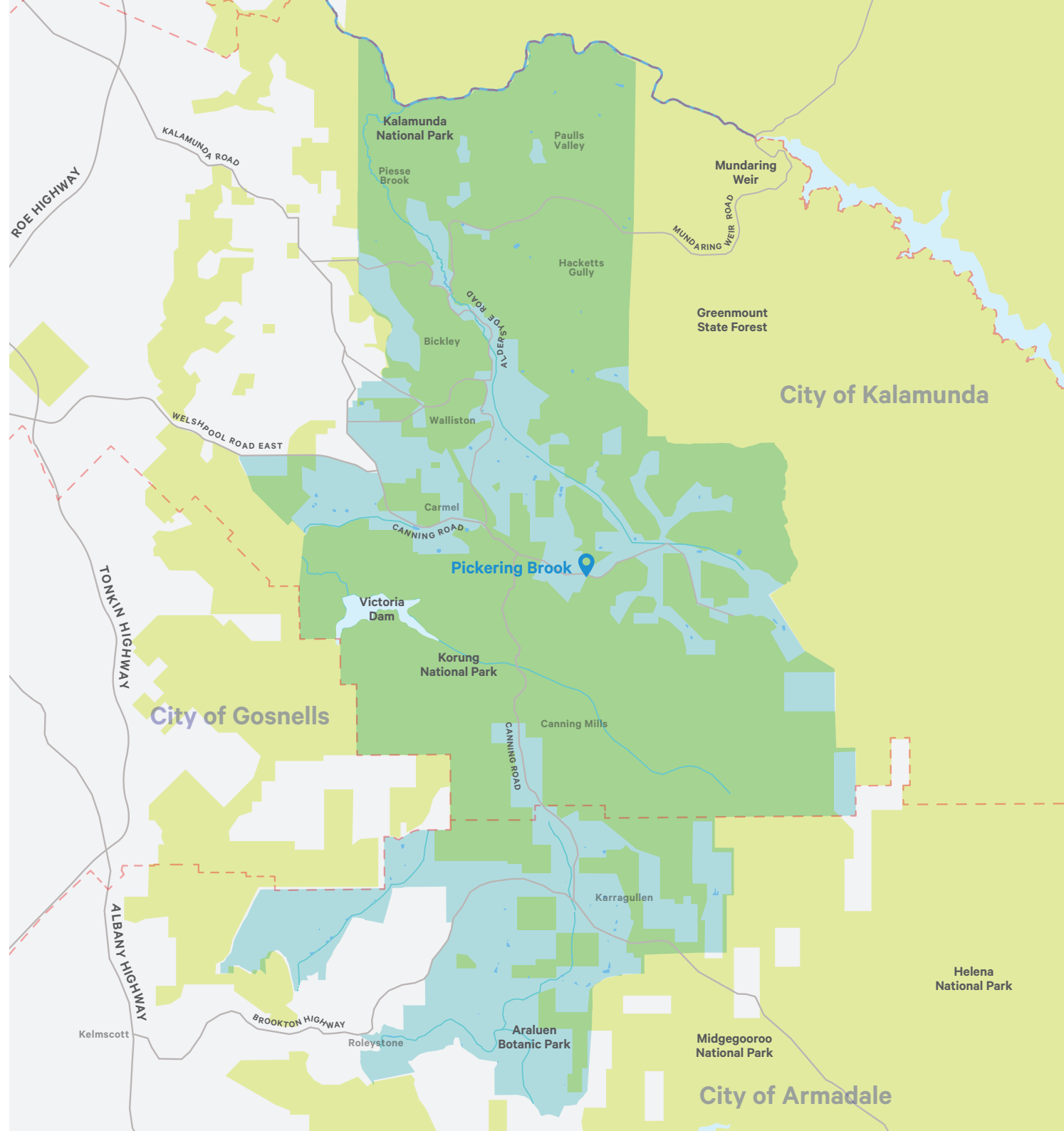


Figure 2. Site Context Plan (element, 2019)

3. Tourism trends and policy drivers

Identifying future opportunities uniquely suited to the Perth Hills requires understanding of the tourism trends and influences that are shaping product and experience development in other markets. A complete trends analysis is at Appendix 2 and summarised below:

Trend	Summary	Opportunity for Perth Hills
The Experience Economy	There is a growing trend towards valuing experiences and services in place of material products, in pursuit of joy and minimising consumption. Visitors are looking to enjoy unique experiences where it is as much about the place as it is about the people met, unique encounters had, stories heard and produce sampled.	Perth Hills' tight knit community of operators with deep, intergenerational connections provides a strong base to tailor experiences unique to its setting with opportunities to highlight these through promotions and marketing.
Agritourism	Traditional agriculture operations are experiencing increasing pressures due to stronger competition in global markets, lower commodity prices and environmental constraints. Where those regions located close to metropolitan areas have been protected from urban development, agritourism has emerged as an opportunity to diversify, complementing traditional uses with farm gate sales, pick-your-own produce and other products such as farm stays.	Agritourism represents arguably the primary opportunity to diversify the local economy, considering the limitations on expanding urban development, due to protection of priority water catchments areas and agriculture land, and minimising bushfire risks. There is a key opportunity to facilitate orchard and farm stays during blossom and autumn seasons, and farm gate and 'meet the maker' experiences throughout the year.
Cultural tourism	Visitors are seeking knowledge of a place's history beyond visiting museums or reading tour guides. Added to this, visitors to WA are seeking authentic Aboriginal cultural experiences, with Tourism WA reporting 82% of visitors would like to take part in an Aboriginal tourism experience however only 26% leave having done so.	Opportunities to create new experiences in partnership with the Noongar community could include bush tucker harvesting and cooking schools, supporting existing celebrations such as the Makuru Arts Festival, and walking on country experiences such the Perth Observatory Cultural Day Tour operated by Aboriginal Nature Treks. The PHTA has the opportunity to work closely with the Western Australian Indigenous Tourism Operators Council to stimulate regional cultural experiences.
Soft adventure	Destination cycling, mountain bike riding is a significant growth sector and an average of just over 350,000 overnight visitors to WA per annum undertook cycling while travelling in 2019. These visitors are experience seekers with high disposable income, bringing significant flow on benefits to complementary activities including hiking, camping, bridle tours, specialty accommodation and hospitality.	Perth's small yet growing mountain biking and road cycling community regularly visit the Perth Hills, and this is a sector to grow further through investment in line with the State Government's two-year action plan for nature-based tourism (2019-2020) Water based activities and other soft adventure attractions such as ziplines and ropes courses are proving to be both complementary to this market, and unique attractions in their own right.

Trend	Summary	Opportunity for Perth Hills
Responsible tourism	This trend reflects a growing global consciousness around consumption, eco-footprints and the importance of 'taking time out' to reconnect with self and nature at a basic level. Key opportunities point to restorative recreation, cultural immersions, green getaways and creative retreats.	Given high levels of protection from development and policy requirements to minimise environmental impact, the opportunity to market the Perth Hills as a responsible tourism destination is significant. This includes promoting tourism development options with a lighter footprint on the local eco-system and protecting key landscape values by ensuring developments blend with their surrounds.
Niche accommodation	Discerning consumers and niche audiences are increasingly seeking unique accommodation products that offer a memorable and authentic stay. These generally offer a wellness component, local produce, low impact / low footprint performance, connection to the natural environment and a showcasing of unique local buildings and heritage assets.	There is little diversity in the current accommodation offer and niche opportunities may include: <ul style="list-style-type: none"> • Glamping, eco and nature-based tourism • Wellness retreats including day spas • Farm stay and orchard stay • Hostel, caravan and camping • Larger scale accommodation product • Low footprint / high environmental performance offerings
Astro-tourism	<p>Astro-tourism is a small but growing trend centred on visitors seeking out dark skies to enable a clear and unpolluted view of the solar system. Western Australia is ideally placed with its relative isolation, dispersed population and clear night skies enabling uninterrupted viewing.</p> <p>At the time of writing, the WAPC and Minister for Planning, Lands and Transport is preparing a draft Position Statement 'Dark Sky Status and Tourism' too investigate protecting the night sky and planning mechanisms that may assist such protection.</p>	<p>The Perth Hills enables great clarity for viewing within close proximity to other supporting amenities, with minimal specific supporting infrastructure required. There are also strong product extension opportunities through niche accommodation, walking tours and connections to Aboriginal cultural heritage.</p> <p>At the time of writing, the WAPC and Minister for Planning, Lands and Transport is preparing a draft Position Statement 'Dark Sky Status and Tourism' to investigate protecting the night sky and planning mechanisms that may assist with such protection.</p>



4. Study area context

Product offer

Over the last 20 years, the study area's tourism product offer has grown organically from a low baseline. Significant growth occurred from approximately 2011 to 2019, likely driven by multiple factors such as new generations of landowners diversifying from agriculture and a raising in the profile of the Perth Hills.

Now, a range of well-known attractions are based across the Perth Hills including Core Cider House and Carmel Cider Company, La Fattoria, Myattsfield Winery, Raeburn Orchards and the bushland and gardens at Araluen Botanic Park.

A product audit completed by Tourism WA in 2019 shows close to 130 products across the Perth Hills, comprising 40 accommodation products and 87 attractions and activities.

Within the PBSSTS study area, 34 products were identified across the cities of Kalamunda and Armadale as follows:

- Accommodation: 9 (bed and breakfasts, cottages, guest houses);
- Attraction: 16 (wineries, cideries, food produce, gardens);
- Activity: 3 (train ride, camel ride, bike tour); and
- Attraction and activity: 6 (fruit picking, food market, festival).

The product audit, along with stakeholder engagement and site visits have informed this gap analysis.

Tourism in the Perth Hills has grown organically over the last 20 years with a concentration of activity from 2011-2019, focussed on Kalamunda, the Bickley Valley and Pickering Brook and tourism growth extending into Roleystone and Karragullen.

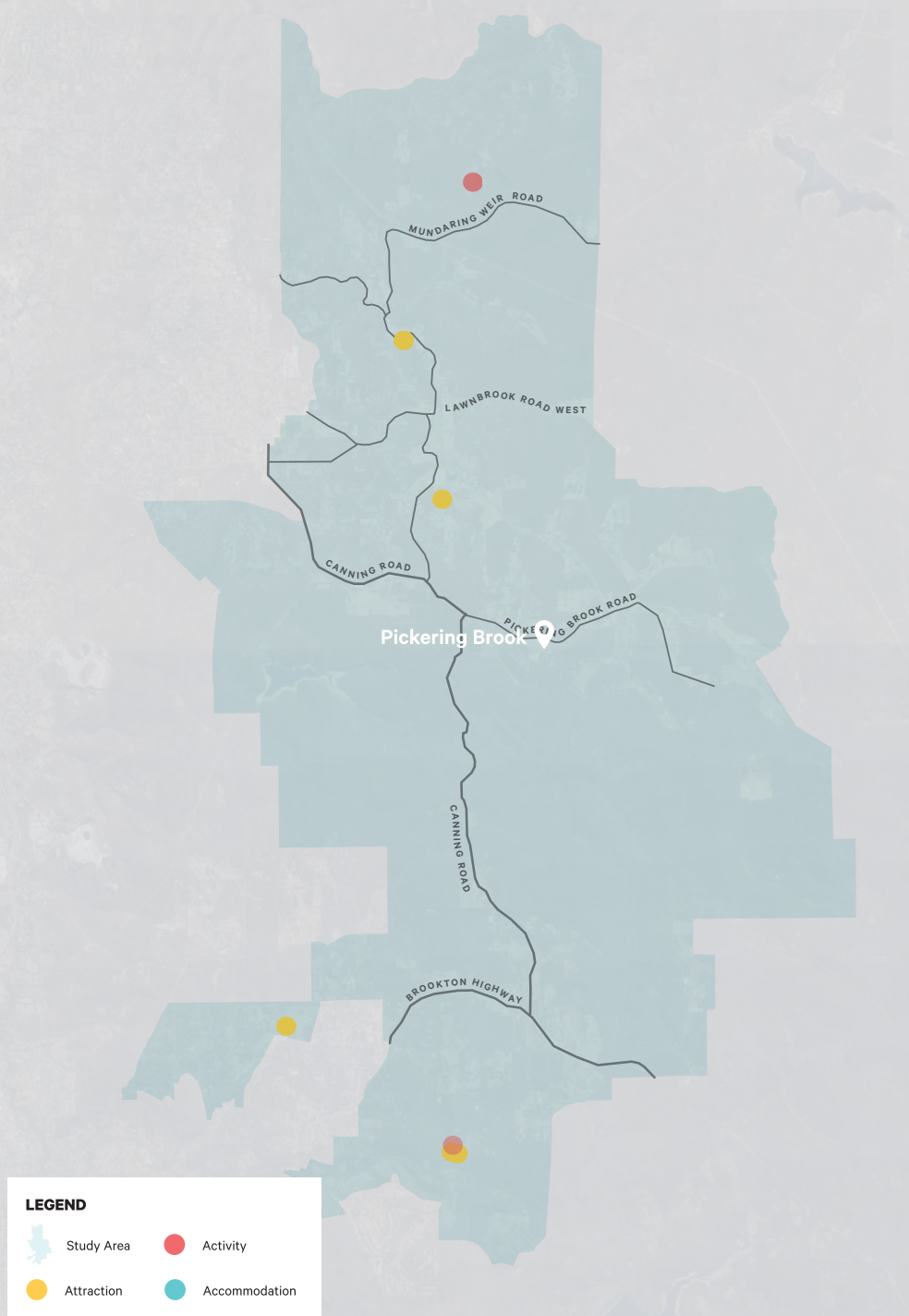


Figure 3. Tourism uses over time - pre-2000 (element, 2019)

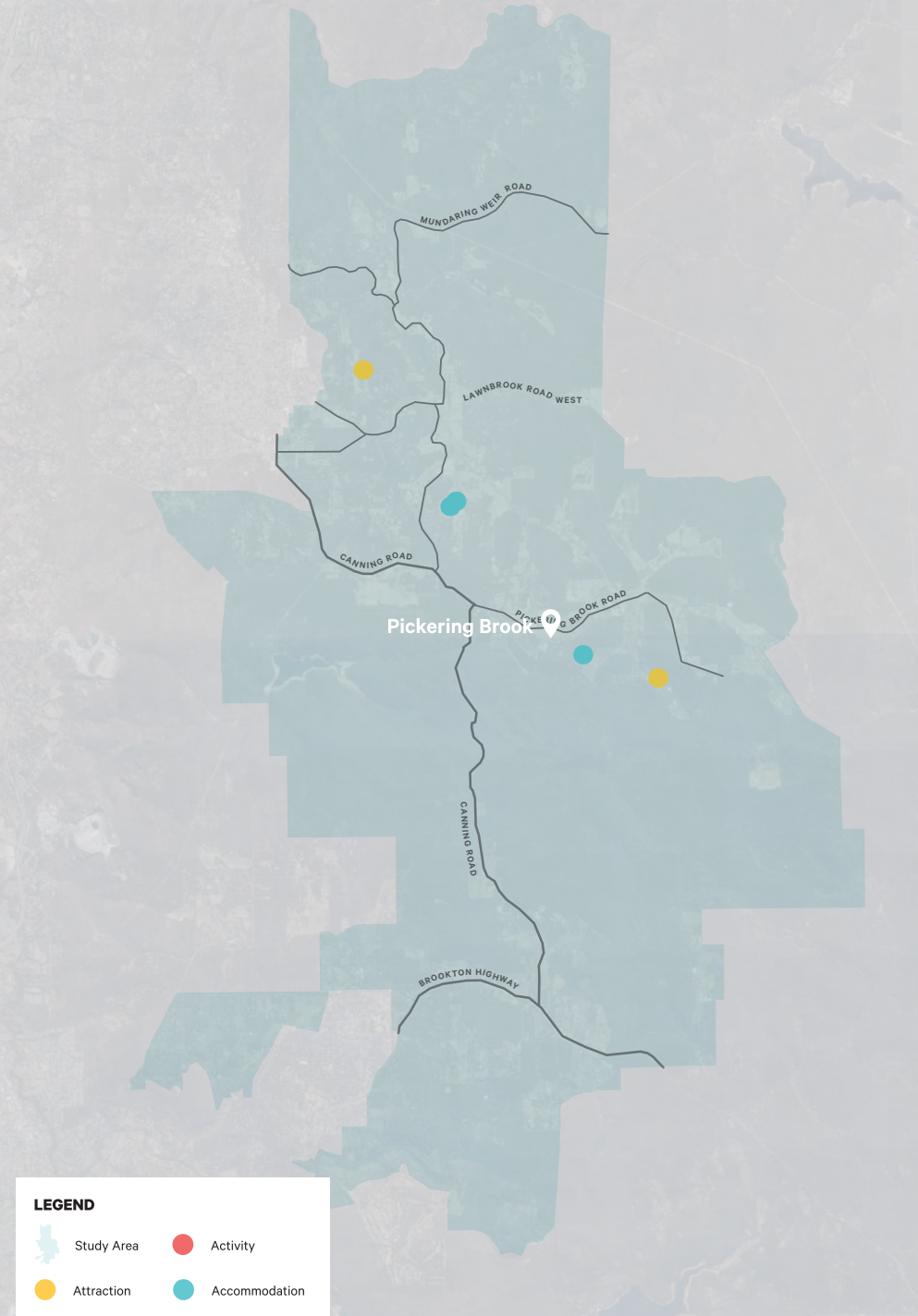


Figure 4. Additional tourism uses over time - 2000-2009 (element, 2019)

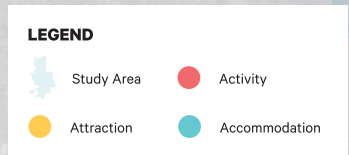


Figure 5. Additional tourism uses over time - 2010-2019 (element, 2019)

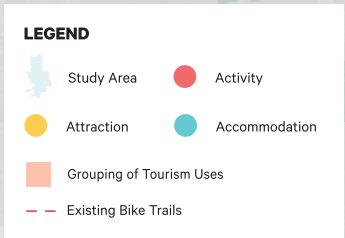


Figure 6. Tourism uses over time - Overall (element, 2019)



The visitor experience

With more than 130 products across the wider area, a strong base exists from which to deepen and diversify the study area's current offer, in turn raising its profile and delivering visitation to strengthen economic performance. There is a strong history of 'mum and dad' operators which, for visitors, provides a unique and tangible connection to the local place identity. However, expanding the visitor offer has for some operators been challenging, due to the switching in focus from agricultural operations during the week to a tourism offer on weekends.

At present, opening hours across the Perth Hills are not consistent, with a focus on Friday to Sunday, leaving some mid-week visitors disappointed. High weekend yield can at peak times compromise the overall quality of the visitor experience. Consistent trading hours with a clear communication strategy is important to position the Perth Hills as a reliable destination.

The Perth Hills's cycling and mountain bike trails are rated some of the best and most well-known in the state, however, are relatively unknown to interstate visitors. Cycling is a growing market with research showing they spend significantly more per visit than average, and an opportunity exists to provide larger-scale accommodation for cycling events that attract interstate competitors. As such the Perth Hills has been identified as a primary recreational mountain biking destination for the Perth and Peel Regions, of high priority and national significance.

At a strategic level, future growth opportunities include soft adventure (mountain biking etc.), Aboriginal cultural experiences, agritourism, farm stays, the evening economy (including astro-tourism), new signature events and expansion of supporting facilities. Future opportunities may include higher-end and eco-accommodation offerings.

Local and state planning context

Local planning frameworks and strategies primarily seek to ensure that future land uses, development and subdivision do not harm the Perth Hills's general amenity, including tourism-related activity. They purposefully limit urban-type zonings – and associated variety of land uses and lot sizes – within the area to protect the natural landscape's visual amenity, which in itself is a significant attraction. Balancing and preventing 'over development' while facilitating strategic tourism and economic development opportunities will continue to be a key focus and driver for local planning frameworks and shared policies.

Currently, local planning strategies recognise the many barriers and limitations to developing tourism uses in the area, with particular reference given to planning for bushfire, and public drinking water source protection areas. Spray drift, the need to observe biosecurity protocols and interface management between tourism and agricultural/orcharding uses is also likely to become an increasing challenge as tourism operations develop in the rural-based area. Advice provided by state and local government agencies regarding tourism development potential is at times perceived to be inconsistent which can lead to uncertainty amongst local landowners and applicants.

Bushfire control is a key consideration in new tourism development and issues that arise relate to road access and capability to support increased visitor numbers. A reduction in bushfire risk may be aided by leveraging new planning scheme aims, objectives, local planning policies and mapping tools.

Drinking water source areas present unique challenges. Where development is proximate to these, strict conditions regarding wastewater treatment and disposal can affect project viability. A land use and water management strategy was prepared by the WAPC for the Middle Helena Catchment Area in recognition of its catchment-specific challenges and opportunities regarding drinking water source protection.

Opportunity exists to provide consistent information to prospective tourist operators with the view to clarify the development approval process. Information being developed by Tourism WA through the State Government's Tourism Attraction Case Management Framework has the potential to assist local government authorities with this.

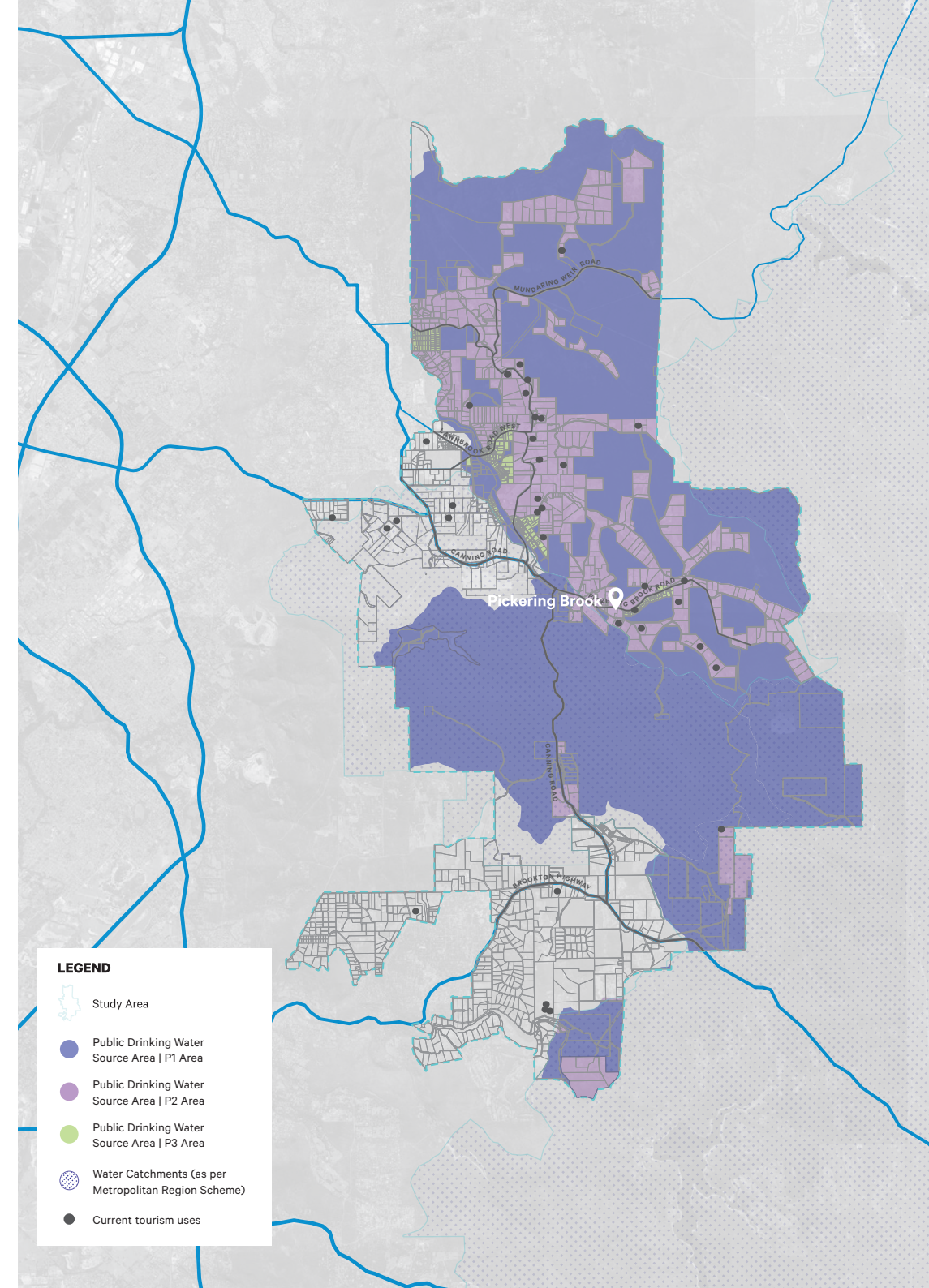


Figure 7. Public Drinking Water Source Areas (element, 2019)

Spatial and geographic context

Land ownership

The study area is characterised by large state government land holdings which are primarily national parks under the management of Department of Biodiversity Conservation and Attractions (DBCA). These land holdings present the opportunity to establish connections and strengthen identified groups of tourism uses.

Tourism uses are generally located on privately owned land. As such local authorities role largely relates to facilitation of local infrastructure and services to support tourism development.

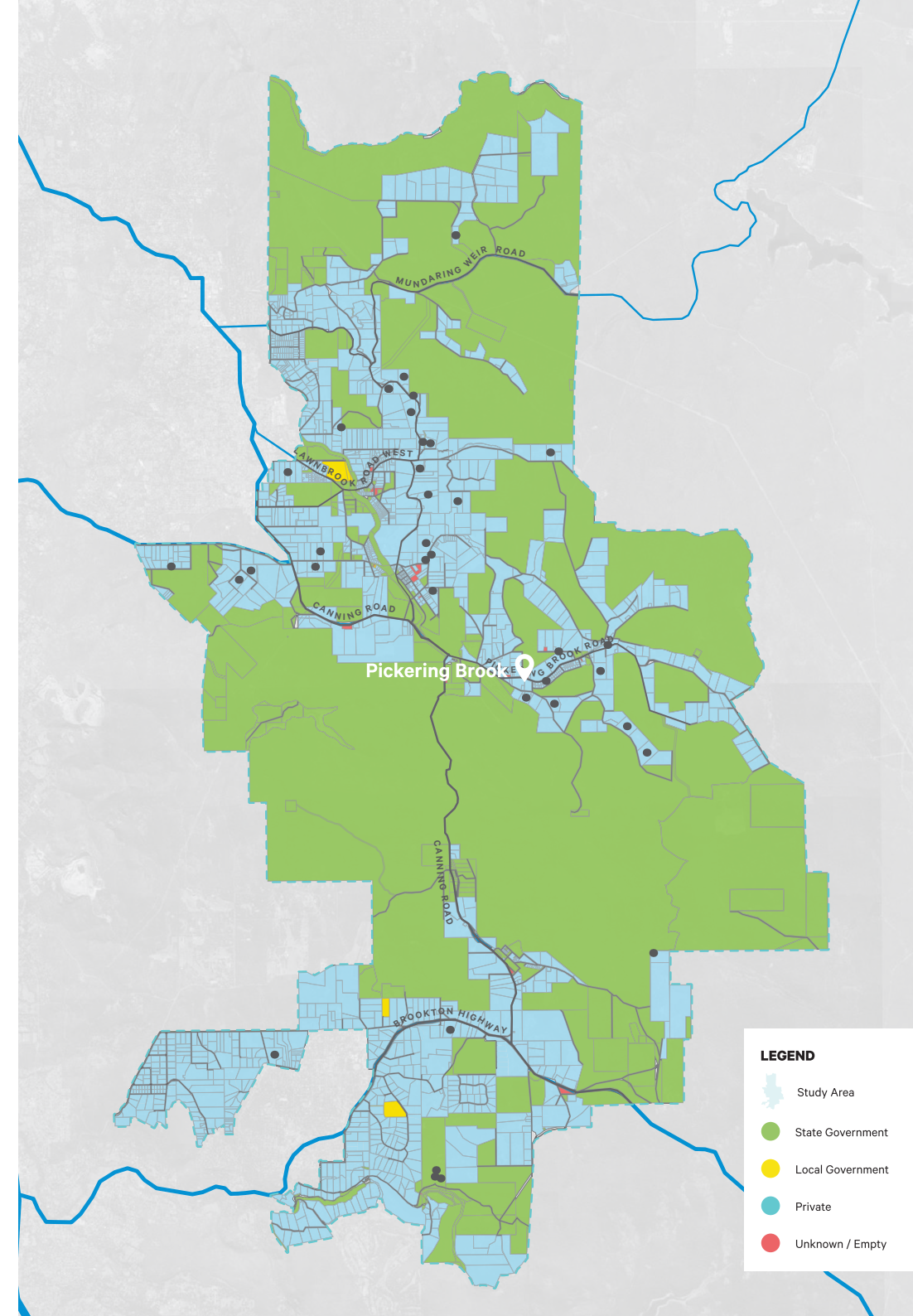


Figure 8. Land Ownership (element, 2019)

Grouping tourism development

Existing tourism uses have grown organically throughout the Perth Hills, including natural groupings across the Bickley Valley and along the major corridors of Canning Road, Welshpool Road East and Pickering Brook Road.

The majority of accommodation and attractions are located within the City of Kalamunda and located in close proximity to mountain bike trails, and established orchards and farms. Many enjoy high quality views and easy access to national parks and state forests.

There is evidence of an emerging grouping around the Roleystone and Karragullen localities.

Development as a tourism destination

For comparison / benchmark purposes, the study area is approximately twice the size of the Swan Valley, however much of it is not able to be developed for tourism uses due to its designation as national parks and water protection areas. This designation will, however, protect the rural amenity over the long term providing unique natural and landscape assets upon which tourism developments can leverage.

As such 'over tourism' is unlikely and high levels of visual and landscape amenity will prevail. The study area's relatively restricted access and legibility of the road network will require improvement to facilitate tourism development and visitation.

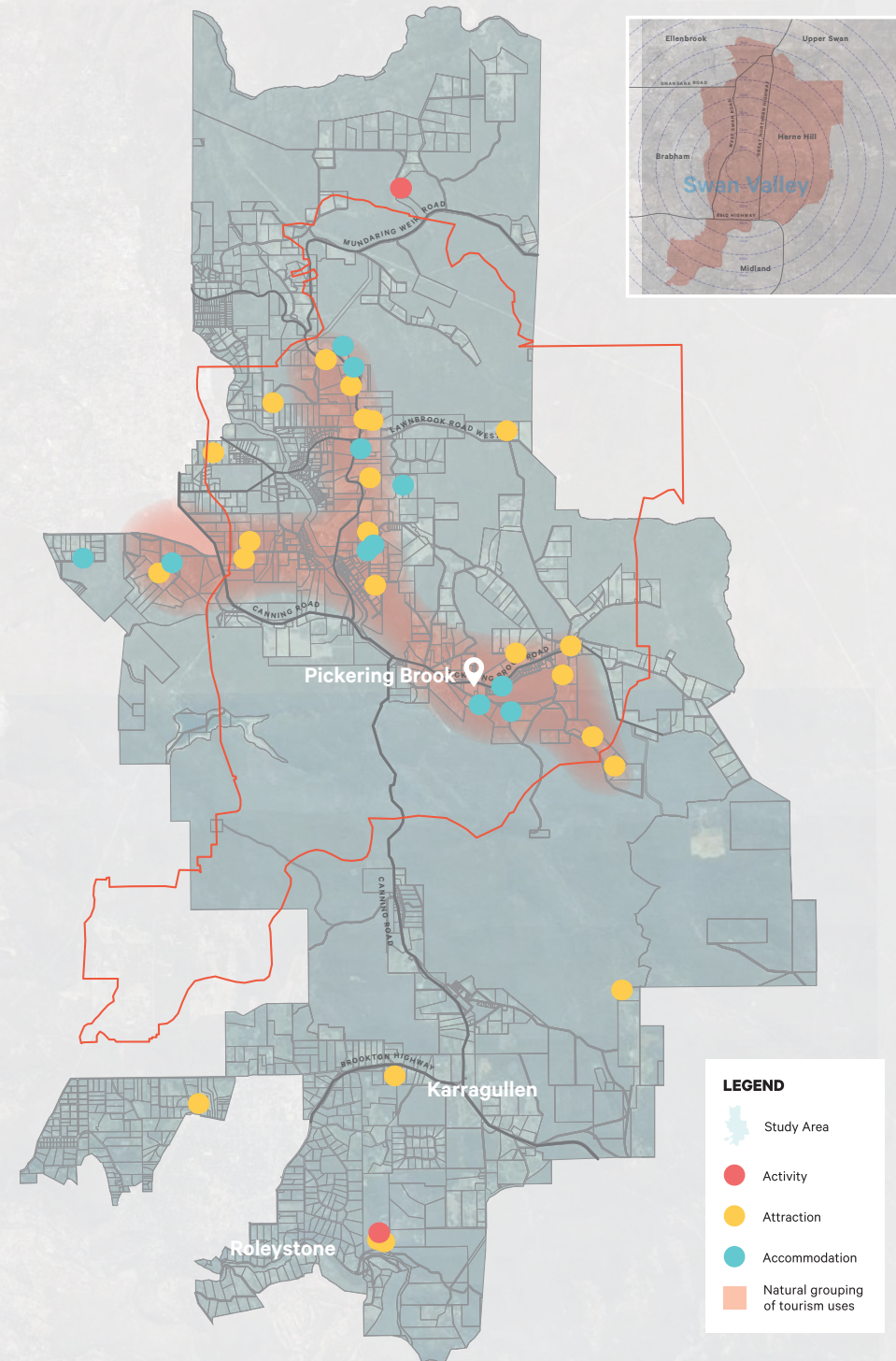


Figure 9. Comparative Analysis with Swan Valley (element, 2019)

Planning Framework

Privately owned land within the study area is primarily zoned for rural-type uses with some limited urban zoning which can accommodate a range of land uses.

Rural zones seek to protect and enhance the area's landscape and amenity. Many tourism uses are located within "Additional Uses" indicating that tourism activities currently do not comfortably fit within defined use definitions or zoning objectives with provisions designed to protect rural values, tourism and adjacent land uses.

Map source: Adapted from PlanWA, DPLH as of November 2019

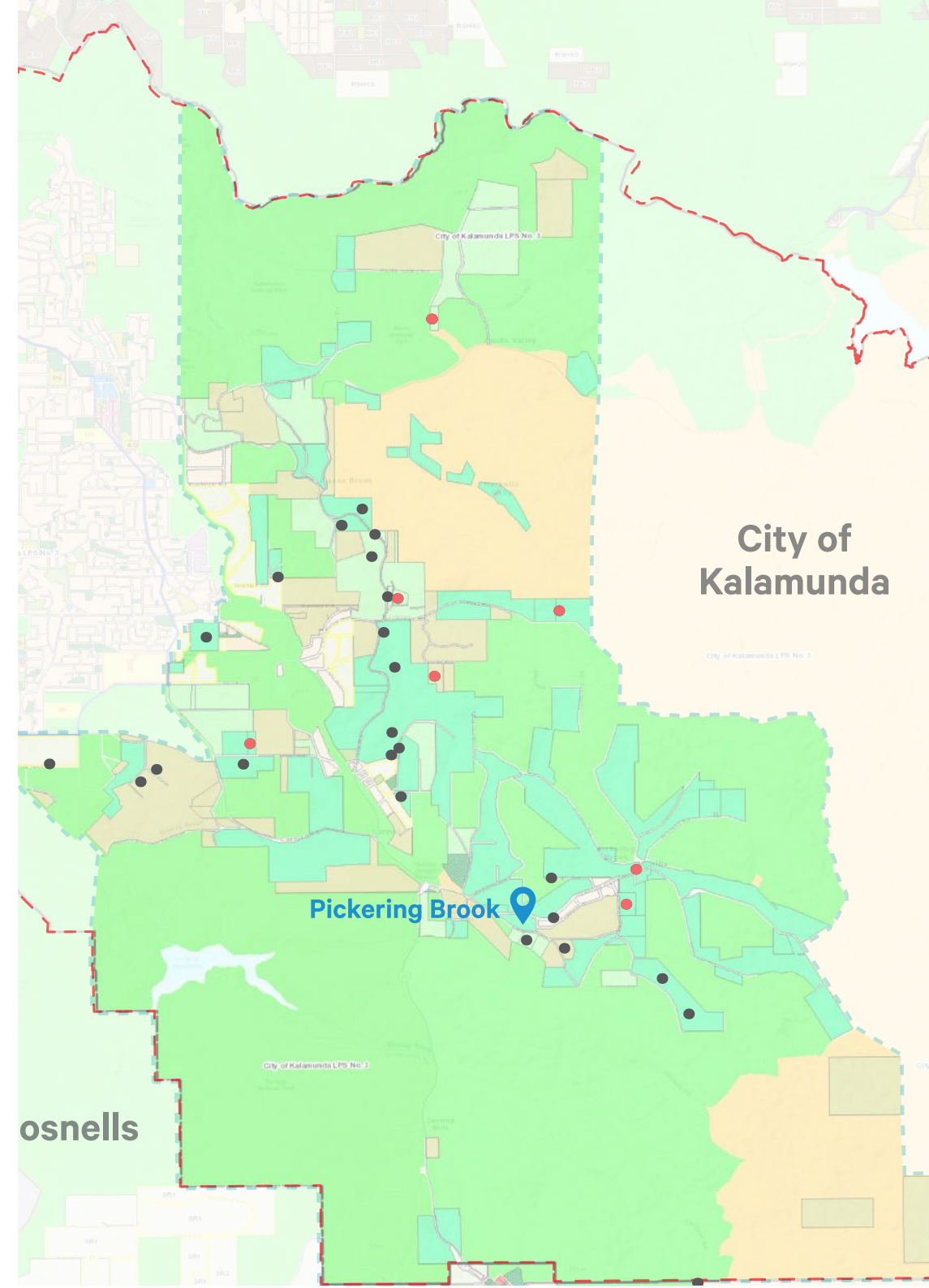
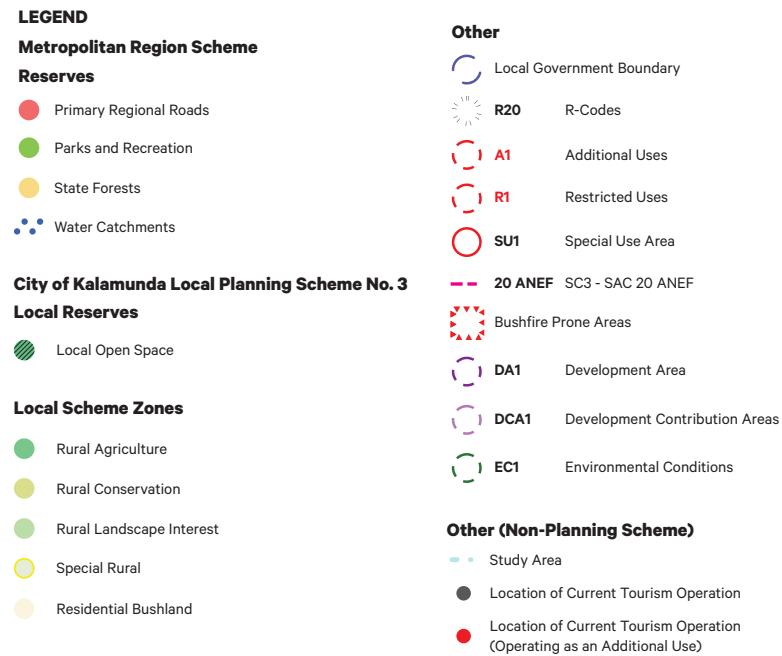
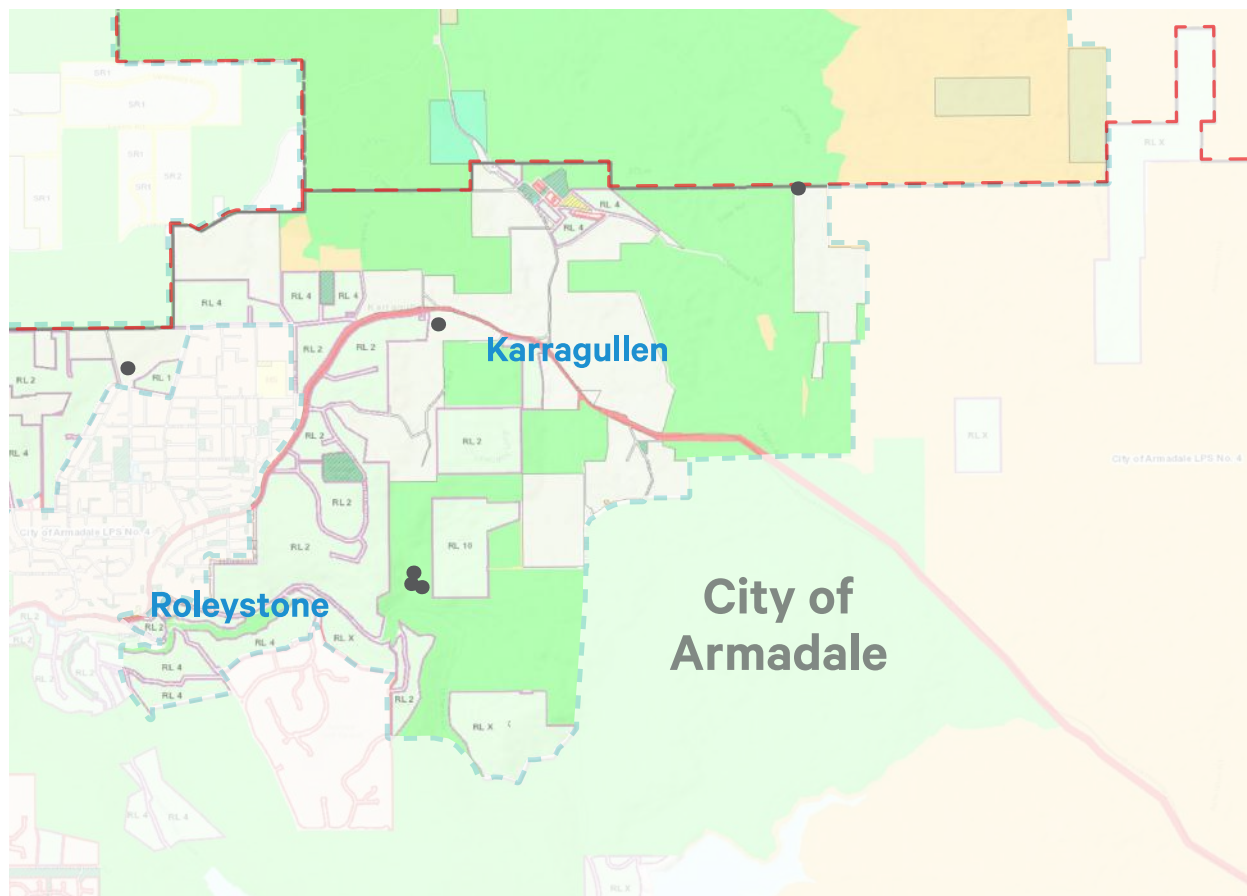


Figure 10. Local Planning Scheme (element, 2019)



LEGEND

Metropolitan Region Scheme

Reserves

- Primary Regional Roads
- Parks and Recreation
- State Forests
- Water Catchments

City of Armadale Town Planning Scheme No. 4

Local Reserves

- Local Open Space
- Public Purposes

Local Scheme Zones

- General Rural
- Rural Living: 1ha
- Rural Living: 2ha
- Rural Living: 4ha
- Rural Living: 10ha
- Rural Living: Xha
- Special Residential
- Special Use

Other

- Local Government Boundary
- R20 R-Codes
- A1 Additional Uses
- R1 Restricted Uses
- SU1 Special Use Area
- RL1 Rural Living
- DA1 Development Area
- Development Contribution Area
- Development Envelope Area
- EC1 Environmental Conditions

Other (Non-Planning Scheme)

- Study Area
- Location of Current Tourism Operation
- Location of Current Tourism Operation (Operating as an Additional Use)

Figure 11. Local Planning Scheme (element, 2019)

5. Stakeholder engagement

A series of stakeholder touchpoints have informed the gap analysis. These have confirmed existing strengths and identified opportunities for improvement across product – activities, attractions, amenities, accessibility, accommodation – and the planning framework.

Stakeholder engagement touchpoints:		
Roundtable sessions	One-to-one conversations	DPLH-led consultation
<ul style="list-style-type: none"> Tourism WA, DPLH, LGAs, Destination Perth Local operators, businesses 	<ul style="list-style-type: none"> State agencies - DPLH, DFES, DWER, DBCA Perth Hills Landowners for Tourism and Subdivision Group representatives 	<ul style="list-style-type: none"> Online and postal survey One-to-one conversations – operators, residents, local stakeholders



Product – Activities and attractions

Strengths	Considerations
<ul style="list-style-type: none"> Picturesque, charming and high quality, natural surrounds Proximity to Perth metro, opportunity to retreat to nature Successful focus on autumn/winter seasons Views and vantage points Trails networks – biking, hiking, horse riding Strong mix of unique natural and cultural attractions and well-known businesses 	<ul style="list-style-type: none"> Attractions in need of re-investment and re-invigorating Improve diversity to broaden visitor profile / attract new visitors Opportunities for agritourism, corporate markets, recreation and trails, arts, cultural and heritage celebrations, horticulture and Aboriginal cultural tours attractions



Product – Amenities and accessibility

Strengths	Considerations
<ul style="list-style-type: none"> Network of high-quality Visitor Centres Scenic drives Proximity to Perth metro area – day trip market Proximity to airport and future Forrestfield train station as part of the Forrestfield Airport Link 	<ul style="list-style-type: none"> Improving access – road, parking, public transport (including linking to future Forrestfield train station), private / charter tours Improving wayfinding and tourist information for scenic routes and attractions Improved amenities – ablutions, waste etc



Product – Accommodation

Strengths	Considerations
<ul style="list-style-type: none"> • Strong presence of bed and breakfast and boutique accommodation • A small number of private rental options (e.g. Airbnb) • Demand for bespoke accommodation is strong – retreats etc 	<ul style="list-style-type: none"> • Camping / caravanning with infrastructure to host large events – power, ablutions, vehicle access • Current market conditions unlikely to support traditional hotel model across much of the rural localities however may be a viable opportunity within an established town centre (e.g. Kalamunda) • Gap in mid-week, boutique and niche offerings



Product – Local economy

Strengths	Considerations
<ul style="list-style-type: none"> • Organic grouping of tourism uses and the growing diversity of attractions and activities • Well-performing established and emerging businesses 	<ul style="list-style-type: none"> • Profitability of traditional operations under pressure – orchardists, agriculture etc • Building a critical mass to attract sustainable visitation and extension of opening hours • Building the area's profile and awareness, unified investment attraction strategies



Product – Community and culture

Strengths	Considerations
<ul style="list-style-type: none"> • Close network of growers, operators with a strong connection to the Perth Hills / identity • Historic inter-generational ownership • Unique / interesting storylines 	<ul style="list-style-type: none"> • Hesitation among segment of operators to diversify • Caution regarding over-tourism with desire to maintain area's rural identity • Balancing community support for further subdivision and State Government policy for protection of priority agricultural land



Product – Planning Framework

Strengths	Considerations
<ul style="list-style-type: none"> • Collaboration between LGAs in planning and product development / promotions • State Government position statement on bushfire planning for tourism uses • City of Armadale Scheme Amendments to guide and prevent non-compatible land uses within rural localities and to protect the rural landscape resource on which tourism potential relies • LGAs facilitating tourism proposal through merit based planning assessments and 'Use Not Listed' land use classification or Amendments providing Additional Uses or a Special Use zone where required • Availability of alternate effluent disposal technologies • TourismWA's Tourism Attraction Case Management initiative • Retaining the rural landscape amenity 	<ul style="list-style-type: none"> • Alignment of State Government agency and tourism priorities • Improvements to approvals process– performance-based assessments and decision making to foster a creative planning culture supportive of tourism proposals in suitable locations • Ability to fully assess issues and opportunities arising from site-specific historical contexts or past decisions (e.g. cul-de-sacs / no-through roads previously built in the area would not meet current bushfire planning criteria). • Opportunity to promote / celebrate Whadjuk-Noongar culture through a variety of tourism attractions and activities • Applicants' level of understanding of planning system and approvals processes (and costs), including the various government agencies that review a proposal • Clarity regarding bushfire planning and management • Clarity regarding environment and water source protection, consumption, disposal and treatment requirements (communicated more broadly as a long- standing and clear position) • Determine Perth Hills's tourism 'vernacular' and design excellence to retain natural amenity, landscape, views • Revisit need for Additional Uses under schemes • Improve management of interface between long-term residents and new operators (rural landscape amenity) and uses (e.g. spray drift) • Confidence needed amongst decision makers to support applications that provide alternate solutions to acceptable risk management • Clarity on merit proposals generally for the benefit of Councillors faced with community objection

6. Gap Analysis

Activities and attractions
Gaps/Opportunities
<ul style="list-style-type: none"> • Grow trails and soft adventure • Agritourism extension • Destination food and beverage • Grow signature events • Self-guided tours and 'bundling'
Amenities and accessibility
Gaps/Opportunities
<ul style="list-style-type: none"> • Consistency of visitor facilities • Consistency of road access • Wayfinding and telecommunications infrastructure
Accommodation
Gaps/Opportunities
<ul style="list-style-type: none"> • Extension opportunities for existing business - e.g. chalets at a winery • Grow bespoke, experience driven product • Hotel product (market and demand driven)

Local Economy
Gaps/Opportunities
<ul style="list-style-type: none"> • Align investment attraction, product development and promotion • Build sustainable visitation profile, including mid-week and evening
Community and Culture
Gaps and Opportunities
<ul style="list-style-type: none"> • Balance tourism development with rural identity • Leverage community identity - provenance, ingenuity
Planning Framework
Gaps/Opportunities
<ul style="list-style-type: none"> • Recognition of tourism land uses and benefits in Local Planning schemes and strategies • Consistent application of planning policy • Alternate bushfire management solutions • Water catchment area - capacity and protection • Streamline approvals



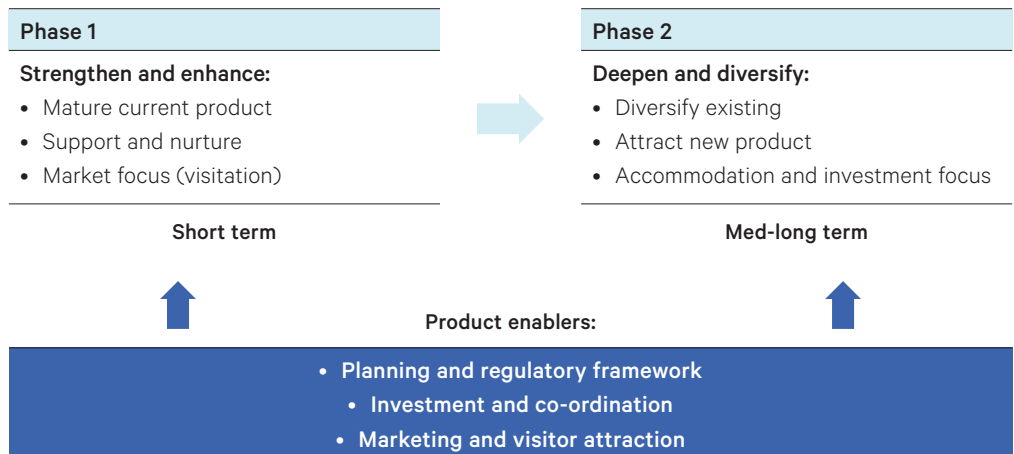


7. Directions and recommendations

A two-stage approach is recommended to respond to identified gaps and realise future opportunities for tourism product development in the Perth Hills. This has the dual benefits of:

Strengthening, enhancing and enabling sustainability and growth for existing product and business operations, while concurrently, or at an appropriate later time, deepening and diversifying the offer as well as attracting new product opportunities.

It should be noted that while destination development, marketing and visitor attraction is beyond the scope of this gap analysis, the primary purpose for development of the PBSSTS is to develop the destination offer and attract new visitor groups. As such, the recommendations should also be considered in relation to the role and scope of the PHTA.



Please note: the 'rationale at a glance' provided in the tables on the following pages condenses the literature review, stakeholder engagement and subsequent desktop research. Refer to the body of the report for more information on specific recommendations.

7.1 Attractions and activities

Consolidating and growing trails, soft adventure, agritourism and the food, beverage and special events offer is a significant opportunity for the Perth Hills. Given its proximity to Perth, there is also potential to position it as a 'gateway' or entry point to go on and explore other tourism regions across the state that offer a more advanced product, for example Collie as the state's mountain biking capital, the Swan Valley, Margaret River and Southern Forests for food and wine.

In the longer term, development of a Perth Hills 'showcase' facility, for example co-located with the Perth Hills Visitor Centre, could provide a 'one stop' demonstration of the Perth Hills, encouraging further exploration of, and longer visitation across, the study area.

Phase 1 – Strengthen and Enhance

Recommendation	Rationale at a glance
<p>1 Position the Perth Hills as the state's trails and soft adventure 'gateway' and entry point for a variety of trails experiences and markets</p> <ul style="list-style-type: none"> • Tourism WA in consultation with PHTA, the City of Kalamunda (CoK) and City of Armadale (CoA), to undertake the development of food and beverages trails, cycle trails and a regional astro tourism trail • State Government to progress the development of the Perth Hills mountain bike hub as next state-wide priority complementing Dwellingup and Collie • DBCA to undertake EOI process to attract private sector investment, extending soft adventure attractions e.g. tree top walks, ziplines • DBCA to expand existing trails co-management partnerships with local groups • DBCA and LGAs to invest in wayfinding signage, amenities and management of priority trails, achieving formal accreditation to support ongoing investment • PHTA to promote cohesive offer – including bundling experiences and informational product for visitors 	<ul style="list-style-type: none"> • Current trails offer is well developed – infrastructure, networks, access – including: <ul style="list-style-type: none"> – Mountain biking: Munda Biddi trail, Kalamumda Mountain Bike trails network (Three Bears, Alchemy, Goldilocks etc) – Road cycling: popular routes - Canning, Pickering Brook, Pattersons, Walnut, Aldersyde etc (via Strava) – Walking: Bibbulmun track, Victoria Reservoir, Bickley Reservoir, Whistlepipe Gully, Rocky Pool etc • Opportunity to upgrade parts of the Canning Contour Channel for mountain biking • Engagement identified strong opportunity for Perth Hills to fill gap in mountain bike market at beginner / entry level with other regional centres accommodating experienced riders – e.g. Collie, Dwellingup • Established community-based clubs including Kalamunda Mountain Bike Collective, Perth Mountain Bike Club • Established co-management partnership agreements between mountain bike clubs and DBCA • Established signature road cycling and mountain biking events, including Annual Dams Challenge, Kalamunda 50/50 etc • Mountain biking tour companies offering easy access / barrier free participation for tourist markets – e.g. Rock and Roll Mountain Biking • Identified as strategic priority in Perth and Peel Mountain Bike Master Plan, and LGA tourism strategies • Perth Observatory represents key asset and anchor for wider astro-tourism market • Tourism WA research identifies growing demand for cultural heritage offerings, especially Aboriginal cultural experiences in international markets • The South West Native Title Settlement includes Indigenous Land Use Agreements, which outline State/ National Park co-management opportunities, representing a prime opportunity for the Perth Hills • Trails and soft adventure identified as strategic priority under the state's Two-Year Action Plan for Nature Based Tourism in WA and LGA tourism strategies

Recommendation	Rationale at a glance
<p>2 Unlock agritourism potential and champion the destination's food and beverage offer</p> <ul style="list-style-type: none"> Tourism WA, in consultation with CoK and CoA, to improve farmer / orchardist knowledge and diversify skills by facilitating delivery of: <ul style="list-style-type: none"> Education and capacity building workshops covering farmgate operations, food and beverage trail development, cellar door operations, business, marketing and product development PHTA to leverage existing and develop addition food, wine and cider trails PHTA to co-ordinate destination marketing of cohesive offer – mix of authentic country / rural experiences in close proximity to Perth 	<ul style="list-style-type: none"> Engagement identified willingness from operators to explore opportunities Potential to build cohesive, enticing offer due to strong base of high-performing operators – e.g. Core Cider House, La Fattoria, Myattsfield, the Naked Apple, and Chalet Healy at Araluen Botanic Park Potential for deepening and expansion of existing food, wine and cider trails – e.g. Perth Hills Cider and Brews Trail, and Bickley Valley Wine tours Represents opportunity to enhance farmer / orchardist economic viability by diversifying agricultural operations to include tangible experiences Ability to leverage existing knowledge and infrastructure to diversify product offer with relatively low risk / investment – e.g. 'pick your own' produce, farm gate sales and farm tours including 'meet the maker' opportunities Agritourism products better suited to individuals / couples / small groups – local resistance to products and experiences that are attractive to large groups and have potential to negatively impact amenity, traffic, noise etc Aligns with Perth Hills's established and well-regarded identity – rural experiences, low impact on environment, protection of views Demand for orchard stays stronger during blossom and autumn seasons Tourism WA notes strong and growing demand from local and visiting markets for food and beverage experiences in unique Australian rural setting Aligns with 'Taste 2020' strategy to further develop food and wine regions beyond Margaret River. Research identifies major food and wine event, with trade element, would assist in promotion of Swan Valley with potential to extend to Perth Hills. Local stakeholder desire to position the Perth Hills as more boutique, relaxed, rural alternative to Swan Valley
<p>3 Leverage and grow events calendar to promote Perth Hills</p> <ul style="list-style-type: none"> PHTA to co-ordinate destination marketing of cohesive offer: <ul style="list-style-type: none"> Develop Perth Hills-wide calendar Cross-promote operators, products and experiences at each event / activity Focus on growing Perth Hills's profile from Autumn through to Spring LGAs to facilitate presence by local operators / producers at events LGAs, with support from Destination Perth and Tourism WA, to grow current events to regional significance – scale, profile 	<ul style="list-style-type: none"> Taste 2020 strategy identifies selected events have scope and capacity to grow into regional celebrations: <ul style="list-style-type: none"> Perth Hills Wine Show Bickley Valley Harvest Festival CoK and CoA identify potential to consolidate and grow Perth Hills's profile during Autumn and Spring: <ul style="list-style-type: none"> Corymbia Festival (March) Perth Garden Festival (April) Raeburn Orchard (focus on Autumn leaves) Makuru Arts Festival (July) Araluen Botanic Park events (various) Spring into Armadale Festival (August - November) Kalamunda Garden Festival (November) Engagement identified potential to enhance and focus offer during Winter months, leveraging high quality amenity, strategic views and waterways (and avoid summer bushfire season)

Recommendation	Rationale at a glance
<p>4 Develop organised tours, self-guided tours / itineraries and experience ‘bundling’</p> <ul style="list-style-type: none"> PHTA to build awareness and discovery of the Perth Hills PHTA to cross promote existing tours / products and create opportunities to package different products – e.g. <ul style="list-style-type: none"> Morning - Bike trail tour (Rock and Roll Mountain Biking) Afternoon – Winery lunch including meet the maker (Myattsfeld) Evening – Restaurant dinner including owner talk (La Fattoria) Night - Dark Sky astro-tourism experience (Perth Observatory / Araluen Botanic Park) PHTA to leverage success stories to support case to operators for extending / harmonising opening hours 	<ul style="list-style-type: none"> Opportunity to capitalise on captive Perth market – LGA tourism strategies identify day-trippers as biggest market Opportunity to develop partnerships between operators – with PHTA as facilitator Resource effective – bundles can be ‘self-managed’ by operators once established – cross-promotion, collaboration etc Leverage existing self-guided trails – Bickley Valley Wine Trail, Perth Hills Cider and Brews Trail Leverage Forrestfield Train Station as start/end point for organised tours – Rock and Roll Mountain Biking, Aboriginal Nature Trekz etc Promote hero attractions – Kalamunda town centre, Zig Zag Scenic Drive, Lions Lookout, Core Cider House, the Naked Apple Karragullen, Araluen Botanic Park etc Promote Perth Hills as part of ‘Perth Plus’ campaign positioning – Tourism WA research

Phase 2: Deepen and Diversify

Recommendation	Rationale at a glance
<p>1 Deepen and diversify the trails and soft adventure gateway experience (extension of Phase 1 initiatives and introduction of new products)</p> <ul style="list-style-type: none"> Tourism WA to investigate development of regional astro-trail with Perth Hills as a starting point: Perth Observatory, Araluen Botanic Park, Gravity Discovery Centre, Square Kilometre Array etc PHTA, with support from Tourism WA, to focus on Aboriginal cultural heritage - Noongar astronomy, Camping with Custodians DBCA and LGAs to extend mountain bike trail network by identifying and upgrading suitable trails through use of the WA Trail Development Process 	<ul style="list-style-type: none"> Leverages existing infrastructure and market positioning Identified as strategic priority under State’s Two-Year Action Plan for Nature Based Tourism in WA and Perth and Peel Mountain Bike Master Plan Further investigation conducted within CoK ‘Perth Hills Trail Loop Concept Design Report’ – linking Kalamunda, Bickley and Pickering Brook through upgrading various unsanctioned trails into formal mountain biking trails LGA tourism strategies identify soft adventure as key opportunity for new products: <ul style="list-style-type: none"> CoK: eco-sensitive outdoor adventures, Aboriginal cultural attractions, CoA: Aboriginal cultural attractions, treetop walk, astronomy, wildlife encounters, Shire of Serpentine Jarrahdale (SoSJ): opportunity to transform Jarrahdale into ‘Trail Town’ for mountain biking
<p>2 Investigate Perth Hills ‘showcase’ facility, developing central facility offering demonstrations, masterclasses, seminars, sampling and education</p> <ul style="list-style-type: none"> Tourism WA and PHTA to explore local-state government partnerships PHTA to conduct business case, benchmarking and EOI process to attract private sector investment City of Kalamunda to investigate co-location with Perth Hills Visitor Centre / Zig Zag Cultural Centre 	<ul style="list-style-type: none"> Opportunity identified through stakeholder engagement Optimises use of existing facilities, resources and infrastructure – Perth Hills Visitor Centre / Zig Zag Cultural Centre Promotes whole area, encouraging expanded visitation (time, distance) Opportunity for operators to diversify without up-front investment – e.g. cooking, product demonstration facilities Facilitates co-location of compatible uses, benefiting cross-promotion and collaboration

7.2 Amenities and accessibility

To support the Perth Hills's positioning as a gateway for a range of soft adventure tourism experiences, visitor amenities and access points will require investment to improve efficiency, safety and facilitate growth. Key transport network locations include Canning Road and Welshpool Road East, while existing hero attractions – Zig Zag Road, Lions Lookout, Araluen Botanic Park etc – require upgrades to base infrastructure and amenities. Encouraging the continuation of the natural pattern of development and tourism products will help to rationalise expansion of access networks and investment in supporting amenities, reducing the likelihood of over-tourism and its associated impacts.

Phase 1: Strengthen and Enhance

Recommendation	Rationale at a glance
<p>1 Improve entry and wayfinding signage to raise awareness of Perth Hills's profile, positioning and product mix</p> <ul style="list-style-type: none"> CoK, CoA, DBCA and MRWA to co-ordinate installation of signage at key entry points – Welshpool Road East, Canning Road, Brookton Highway, Kalamunda Road, Great Eastern Highway, Toodyay Road CoA and CoK to improve existing and install new tourism wayfinding signage promoting key attractions, activities, scenic drives, lookouts (e.g. Boulder Rock), local destinations (Kalamunda, Bickley Valley, Pickering Brook etc) CoK to install entry signage to Pickering Brook townsite – promoting product mix, key attractions, identity, upcoming events PHTA to co-ordinate development of the Perth Hills's brand identity 	<ul style="list-style-type: none"> Identified as priority in LGA tourism strategies Important baseline infrastructure to raising area's profile and awareness of product mix extent Encourages spontaneous visitation and return visits Assists with experience bundling Avoids reliance on Perth Hills's telecommunications network – variable coverage
<p>2 Improve road access and cyclist safety</p> <ul style="list-style-type: none"> CoA, CoK and DBCA to upgrade infrastructure along strategic cycle routes to improve user safety and reduce crash risks: <ul style="list-style-type: none"> Welshpool Road East – targeted section widening Canning Road – targeted widening with widening to provide sealed shoulders in medium to long term Hills Spine linking Midland, Kalamunda and Lesmudie (e.g. Zig Zag Scenic Route, Railway Road and Canning Road) Signage and behavioural strategies – informing drivers of cyclist prevalence, encourage safe and courteous behaviour 	<ul style="list-style-type: none"> CoK Bicycle Plan outlines a range of strategic projects and policies to improve cycle safety

Phase 2: Deepen and Diversify

Recommendation	Rationale at a glance
<p>1 Enhance existing and develop new lookouts and viewpoints as bespoke attractions</p> <ul style="list-style-type: none"> • CoA, CoK and DBCA to further develop existing hero lookouts and viewpoints – Zig Zag Scenic Drive, Lions Lookout Walk Trail, Araluen Botanic Park, Lesmurdie Falls etc – with improved visitor information signage, water points, shelters, toilets, interpretive signage etc. • DBCA to leverage scenic values of Victoria Dam with extended walk trails, shelters and toilets, and investigate introduction of camping opportunities on DBCA-owned land (noting multiple ownership of land surrounding Victoria Dam) • CoA and CoK to audit lookouts and viewpoints currently on offer, amenities provided, quality and accessibility and identify priority actions for upgrades • CoA and CoK to investigate additional photographic viewpoints with a focus on safety and limiting any impacts on amenity and natural assets 	<ul style="list-style-type: none"> • Lookouts and viewpoints represent natural extension to visit to region • Perth Hills's product mix can be promoted to captive audience via information bays, signage • CoK tourism strategy identifies investment in viewpoints as priority • It is noted stakeholder engagement uncovered a diversity of opinions regarding expansion of lookouts and viewpoints – the costs of ongoing management need to be seriously considered prior to new lookouts and viewpoints being established
<p>2 Improve road access, egress and safety</p> <ul style="list-style-type: none"> • CoA, CoK and MRWA to monitor road network and upgrade roads when considered necessary for traffic safety and efficiency purposes • DBCA to investigate feasibility (approvals, funding, management) to upgrade fire breaks within state forests / national parks into access ways, with a distinct focus on bushfire requirements, risks and benefits (see section 7.6) 	<ul style="list-style-type: none"> • Road infrastructure investment would assist new tourism development within the study area by improving bushfire management/safety in relation to access/egress in the event of a bushfire • Whole or joint funding likely to be provided by applicants with ongoing management and maintenance responsibility of government

7.3 Accommodation

The Perth Hills is already characterised for its independent accommodation including a range of Bed and Breakfasts and the bespoke offering of Hidden Valley Eco Lodges and Spa. Opportunities to 'add on' to existing business operations should be a focus in the short term – for example, providing chalets or Bed and Breakfast accommodation within an orchard or winery. Alignment with emerging accommodation trends should also be explored – for example tiny houses, Airbnb and glamping.

Further strengthening its gateway potential, upgrading and improving infrastructure for camping and caravanning within existing activity hubs should be prioritised, including within the Kalamunda town centre, Araluen Botanic Park and at the Pickering Brook Sporting Club.

Delivery of traditional hotel-style accommodation will likely be market led with CoK identifying the Kalamunda town centre as a potential while further afield Shire of Serpentine Jarrahdale has identified a strategic landholding in the Jarrahdale townsite to deliver substantial accommodation through a joint venture with the private sector. CoA continues to welcome the addition of a hotel to its city centre and provide land use opportunities for Bed and Breakfast and Holiday Accommodation within its rural localities.

Phase 1: Strengthen and Enhance

Recommendation	Rationale at a glance
1 Strengthen and diversify the study area's accommodation offering <ul style="list-style-type: none"> Tourism WA, in consultation with CoA, CoK and DBCA, to undertake an accommodation analysis of the study area. This includes consideration of existing supply and future demand for glamping/chalets, health and wellness retreats, camping and caravanning (including overflow requirements associated with events), and potential hotel opportunities on sites as identified by CoA and CoK 	<ul style="list-style-type: none"> While previous Tourism WA business cases identified a low likelihood of attracting private sector investment without government incentives due to high risk and preference for hotel markets to stay within Perth metropolitan area, a supply and demand analysis would uncover priority opportunities for investment and changes to policies required to facilitate investment
2 Establish the Perth Hills as a new camping and caravanning 'gateway' <ul style="list-style-type: none"> CoA and CoK to explore introduction of camping capacity at regional anchors – e.g. Core Cider House, Araluen Botanic Park etc CoK to install new caravan dump points, caravan parking within Kalamunda town centre 	<ul style="list-style-type: none"> Target at visitors on short agendas looking for rural / camping experience Preference of some overseas tourists for campsites within close proximity of Perth as first overnight stay before venturing further – e.g. Yanchep, Dwellingup currently popular locations Demand from caravanning clubs for additional sites in close proximity to Perth for musters Closest caravan dump points in Forrestfield and High Wycombe
3 Focus on accommodation 'additions' <ul style="list-style-type: none"> CoA and CoK to facilitate self-contained accommodation on residential lots – e.g. nature based, glamping, Tiny Houses PHTA to promote opportunities for diversification to existing businesses – e.g. chalets at a winery, orchard stays, farm stays 	<ul style="list-style-type: none"> Leverage infrastructure / improve financial viability of existing operations Engagement identified stakeholder interest in diversifying product offer to improve financial viability Ability to deliver with low upfront capital investment – e.g. glamping, Tiny House

Phase 2: Deepen and Diversify

Recommendation	Rationale at a glance
1 Build accommodation capacity to support events and functions <ul style="list-style-type: none"> CoK, CoA and Araluen Botanic Park Foundation to explore funding to invest in basic public amenities (power, ablutions, shelters) to facilitate camping / caravan musters tied to key events <ul style="list-style-type: none"> Pickering Brook Sports Club Kostera Oval, Kalamunda Araluen Botanic Park 	<ul style="list-style-type: none"> No large-scale accommodation in Perth Hills for participants of major mountain biking / cycling events Improves capacity to host large scale events Additional opportunities to on sell tourism products / experiences due to extended visitation – e.g. astro-tourism, targeted food and beverage offers
2 Discrete accommodation investment <ul style="list-style-type: none"> PHTA to support specific and location-based opportunities as they arise – market-led 	<ul style="list-style-type: none"> CoK owns freehold land within the Kalamunda town centre near the Transperth Busport that may have the potential to be utilised as a boutique hotel accommodation subject to further community engagement and detailed consideration of a business case / plan and engagement with Council. Potential for expanded accommodation until recently is being investigated at Araluen Botanic Park

7.4 Investing in product development

Recommendation	Rationale at a glance
1 Align investment, product and promotion <ul style="list-style-type: none"> Regular meetings between PHTA representatives (e.g. tourism, economic development officers) and LGA Planning officers to share information and knowledge leading to earlier issues identification and problem solving PHTA to develop investment prospectus and campaign support PHTA (including Destination Perth) to promote Perth Hills as distinct tourism destination for marketing, branding purposes 	<ul style="list-style-type: none"> Stakeholder engagement identified a need for more cross-communication amongst the Perth Hills' local governments and PHTA to understand how similar matters are addressed at different localities Appears to be an appetite for larger-scaled accommodation however best location is unknown. There is an identified opportunity to open development opportunities to the market and campaign for its support Perth Hills has historically been banded together with the Swan Valley despite its unique experiential offering.

7.5 Planning and regulatory framework

Addressing barriers and enablers within the planning and regulatory framework is a critical component of facilitating investment in tourism development, which complement or add value to the rural setting of the study area and bolster existing viticulture and orchard industries. The following recommendations should be considered in concert with strategies and initiatives in preceding sections.

Recommendation	Rationale at a glance
1 Amend Local Planning (tourism) Strategies: <ul style="list-style-type: none"> CoA and CoK to identify existing tourism product and strategic locations for future tourism development 	<ul style="list-style-type: none"> Gap analysis has identified that encouraging continuation of the natural pattern of development and tourism product can be strengthened and enhanced in the short to mid-term; a term typical for an LPS (5 years). Opportunity to recognise the possibility of composite type tourism uses that are likely to be seen in the future as the tourism product diversifies in the area. CoA LPS (page 45) contains commentary to this effect however there is an opportunity to recognise the study area and natural grouping of uses specifically. There is an opportunity for CoK to identify and leverage the differences between Kalamunda and Pickering Brook centres when considering the strategic location of tourism uses. The geospatial analysis contained in section 4 of this report may assist LPS's to identify areas targeted for sustainable tourism opportunities, both for private operators and for focussing local government tourism efforts. Consideration of bushfire issues when deciding strategic areas of development is important (type and extent of vegetation, topography, possible fire runs, evacuation options, extent of clearing required, conservation considerations, water availability etc.).
2 Introduce a tourism-specific Local Planning Scheme objective: <ul style="list-style-type: none"> CoA and CoK to include a Local Planning Scheme objective to recognise sustainable tourism development generally. 	<ul style="list-style-type: none"> CoK's and CoA's Local Planning Schemes do not contain sustainable tourism in their overarching objectives. Opportunity to recognise sustainability in tourism at the local statutory level with a scheme objective. A scheme objective elevates the importance of a matter by reinforcing its level of regard in all layers of local planning. A scheme objective worded to capture both the support for tourism related development within the study area and the need to maintain its rural amenity.
3 Include rural zone objectives: <ul style="list-style-type: none"> CoA and CoK to include tourism-specific objectives within the relevant Rural zones of the Local Planning Schemes. 	<ul style="list-style-type: none"> An objective for insertion within the various rural zonings may allow for the development of sustainable tourism uses while acknowledging the rural amenity of the area. It is recommended the underlying zonings for the study area remain Rural. The rural amenity of the area was identified as a priority throughout the literature review and during stakeholder engagement. The underlying zoning of the area should therefore remain Rural (rather than introduce a tourism zone), while allowing for appropriate tourism development (see recommendation 4). CoK's view is that tourism uses should be ancillary or incidental to rural uses, as a tourism precinct or zone is likely to impact on residents or landowners who are not associated with the tourism industry. The CoA Local Planning Scheme, for example, contains a General Rural zone objective that goes some way to address this: "to provide for a range of associated compatible activities and development to complement the primary productive use of the land while preserving the rural character and amenity". However, there is the opportunity for relevant rural zone objectives to specifically encourage tourism land uses and soften the need to be secondary to productive uses in limited circumstances.

Recommendation	Rationale at a glance
<p>4 Introduce a ‘tourism development ‘ Land Use Classification:</p> <ul style="list-style-type: none"> DPLH to consider developing, in consultation with CoA and CoK, a land use definition for ‘tourist development’. Note: there will need to be more planning policy work associated with a definition that will assist with related implementation by State and local government within identified tourism regions across WA. 	<ul style="list-style-type: none"> The statutory mechanisms relevant to tourism should be reviewed at each scheme review (5 year cycle) with a view to ensure rural enterprise remains the primary land use in the area. Supporting local planning policy (see recommendation 5) can detail the manner in which ‘tourist development’ can be considered ‘boutique’, for example. The rural amenity of the area was identified as a priority throughout the literature review and during stakeholder engagement. The literature review identified many tourism uses do not comfortably fit within existing land use classifications due to their composite nature but are still seen to contribute an economic outcome for the area (removes need for 12+ month planning process to introduce an ‘additional use’ on land). Provides a level of certainty to landowners and investors in the area that tourism product is able to be considered for development. Approach is not dissimilar to the model provision Light Industry definition which refers to no adverse impacts on amenity and that the establishment is not to impose undue load on existing or proposed essential services or infrastructure.
<p>5 Introduce a shared planning policy:</p> <ul style="list-style-type: none"> Perth Hills LGAs, in collaboration with DPLH, to develop a shared planning policy to address study area specific limitations, opportunities, context and character. 	<ul style="list-style-type: none"> The policy could be endorsed by DPLH with dedicated local government representatives to oversee its administration and act as a go-to resource for tourism development proponents. The policy should include relevant and consistent considerations for assessing and determining tourism proposals such as provisions that guide performance-based solutions for: <ul style="list-style-type: none"> addressing topography constraints; land use proximity (light, sound, spray emissions, biosecurity); ensuring water quality protection; siting, scale and built form design principles to protect rural amenity (including the intensity of development or ‘boutique’ offering); integrate landscaping; and Provide allowance for where staged clearance of approval conditions can be made to aid small business to become established. The rural amenity of the area was identified as a priority throughout the literature review and during stakeholder engagement. There is a desire amongst stakeholders that future tourism developments are complementary to the rural nature of the area and are of a scale and intensity that is sympathetic to the area’s natural environmental attraction. It will be important to guide tourism development within the study area to assist in ensuring the study area’s rural integrity remains intact. <ul style="list-style-type: none"> A significant issue for the study area is the potential for new tourism developments to prejudice the continuation of nearby or adjacent existing intensive agriculture land uses due to concerns such as spray drift, noise and light pollution etc. Tourism uses must be compatible with rural uses. The policy will work hand-in-hand with the online reference tool (refer to section 7.7 of this report).

7.6 Environmental management

Recommendation	Rationale at a glance
1 Update bushfire planning guidelines: <ul style="list-style-type: none"> DPLH to investigate additional examples of alternate solutions for inclusion in the bushfire planning guidelines and Position Statement on Tourism Development in Bushfire Prone Areas (November 2019). State Government to invest in resources / capacity and capability of DFES staff to review planning applications proposing alternate solutions. 	<ul style="list-style-type: none"> Identified as priority barrier to be resolved during stakeholder engagement. It is noted: <ul style="list-style-type: none"> A review into bushfire risk and management in the area has, or will be, commissioned as part of this project to help inform this gap. Guidelines for Planning in Bushfire Prone Areas has recently been reviewed and the new version will be released shortly. DFES does not support the Tourism Position Statement as it provides for a lower level of protection from bushfire risk compared with SPP 3.7 and the Guidelines for Planning in Bushfire Prone Areas.
2 Update water catchment protection provisions: <ul style="list-style-type: none"> DPLH, in conjunction with DWER, to update Middle Helena Catchment Area Land Use and Water Management Strategy (2010) to reflect relevant changes to the new Government Sewerage Policy and include examples to assist applicants DWER to map suitable locations: <ul style="list-style-type: none"> Setback requirements from waterways 'Safe zones' Map ultimate catchment capacity to accommodate tourism – understand cumulative impact Determine appropriate venue capacity levels depending on location Technical assessment of technologies to better manage risks (e.g. best practice Aerobic Treatment Units) 	<ul style="list-style-type: none"> Public drinking water source protection identified as priority during stakeholder engagement, particularly for larger-scale venues (e.g. approx. 50 pax deemed acceptable by DWER however not economically viable for some tourism ventures). Stakeholders have identified the need to provide better clarity / communication regarding what are acceptable levels of development in such areas, to enable the protection of the drinking water catchment and what the role of the different levels of government are to ensure that everyone has a clear and upfront understanding of roles and advice. The State Sewerage Policy now has clear descriptions regarding setbacks for ATUs and this information needs to be updated in the Strategy. DWER note it would be simple updating, as the policy regarding PDWSAs hasn't changed and DWERs position on this has also not changed. Note: DWER provides departmental advice to decision-makers and is not a decision-maker itself in regard to setbacks to waterways etc. DWER does not want to hamper development responses that address these issues in other ways by providing a prescriptive approach.
3 Expand DBCA trail adoption program: <ul style="list-style-type: none"> DBCA to expand its trail adoption program. State Government to investigate increasing DBCA's capacity to manage the trail network and partnerships. 	<ul style="list-style-type: none"> DBCA have an existing, successful mountain biking and 4WD co-management arrangements program. DFES desire a road network which provides safe access and egress for the public and emergency services, and a safe and efficient working environment for emergency services (considered an essential requirement). This can be particularly important for tourism developments where visitors are unfamiliar with the location and how to respond in the event of a bushfire. DBCA have advised their current capacity to not only manage existing trails but also administer the co-management arrangements, are limited.
4 Investigate use of waterways, dams for tourism: <ul style="list-style-type: none"> DBCA and DWER to investigate the potential for low impact uses such as camping, expanded walking trails and viewing points. 	<ul style="list-style-type: none"> Opportunity for soft adventure (camping, walking trails, viewing points) identified as desirable during stakeholder engagement. There is a large network of waterways and dams throughout the study area. Anecdotally, the current over-visitation of Serpentine Dam has the potential to de-value this tourism asset. Opening up other waterways or dams for similar 'light on the earth' activities can redistribute the demand and reduce visitor impact on Serpentine Dam.

7.7 Streamlining approvals

Recommendation	Rationale at a glance
<p>1 Online reference tools for applicants</p> <ul style="list-style-type: none"> • PHTA in consultation with Tourism WA to develop fact sheets regarding: <ul style="list-style-type: none"> – Development application information requirements – State agency consultation and rationale for referrals – Approvals processes and timeframes – Likely costs of consultants and fees – Examples of prior approvals (for guidance purposes only) – Links to other agencies and contact details 	<ul style="list-style-type: none"> • Identified as beneficial during stakeholder engagement to provide valuable information that assists with business cases and expectation management. • Ability to be aligned with: <ul style="list-style-type: none"> – Tourism WA Tourism Attraction Case Management (TACM) Framework – Market-led proposals – Streamline WA – City of Kalamunda Tourism Information Sheet

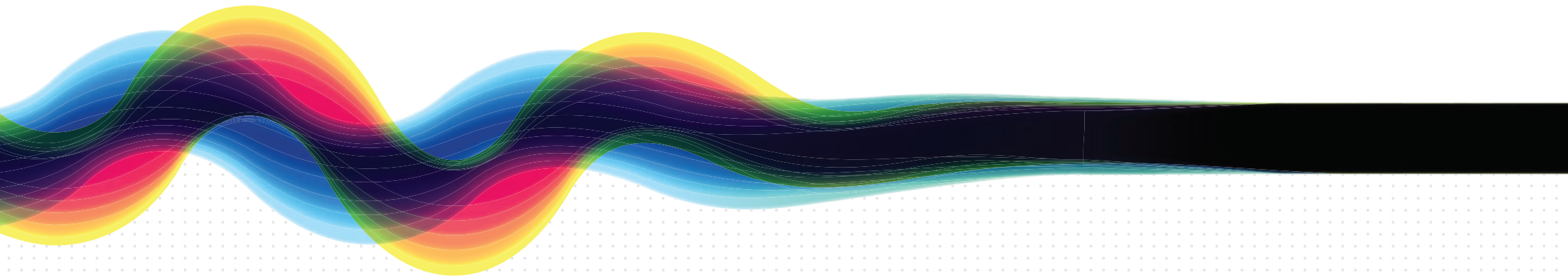
8. Appendices

Appendix 1 – Literature review

Perth Hills Tourism Product Gap Analysis

Literature Review

August 2019 | 19-246



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EXECUTIVE SUMMARY

Purpose and Scope

This literature review forms the first component of the Pickering Brook and Surrounds ('Study Area') Tourism Product Gap Analysis project. The literature review:

- considers baseline research, strategic reports and plans exploring tourism opportunities and barriers for the Study Area and Perth Hills region in general,
- identifies gaps and opportunities for expansion/diversification in tourism products – accommodation, activities, attractions, amenities and accessibility, and
- identifies key implications informing recommendations to resolve regulatory, planning, infrastructure and economic constraints.

Key findings and implications

- **Context:** The Pickering Brook townsite was identified for urban expansion by the CoK however planning constraints – bushfire risk, food production, water catchment requirements etc – provided this to be unfeasible. Agritourism has been identified as a potential alternative to revitalise the Pickering Brook townsite and surrounding area, reflective of the State's wider strategic shift of diversifying the economy by prioritising tourism development. Tourism is now identified as a key strategic priority for the sustainable economic growth of the wider Perth Hills' region.
- **Product offer:** Tourism WA's audit of existing tourist developments within the area illustrates a diverse mix of more than 130 products across the region, with a concentration within the City of Kalamunda. A strong base exists including high-performing, high-profile businesses, exceptional natural beauty, a unique tight-knit community with enduring connection to the area, and proximity to the Perth metropolitan area and Perth Airport. Introducing additional products and diversifying the current offer is expected to raise the region's profile and deliver a critical mass of visitation to strengthen economic performance. Strategic opportunities include higher-end and eco-accommodation offerings, new signature events, soft adventure (mountain biking etc), Aboriginal cultural experiences, agri-tourism, farm-stays, the evening economy (including astro-tourism) and an expansion of supporting public facilities.

- **Regional performance:** A history of 'mum and dad' operators provides a unique, tangible connection to the area, which many visitors seek out (e.g. meet the maker, behind the scene stories etc). However, due to an ongoing need to manage agricultural operations during the week, tourism opening hours tend to be limited to Friday to Sunday. Some frustrations have arisen with mid-week tourists leaving disappointed, or the current high visitation yield on weekends at times compromising the overall quality of the visitor experience. Consistency of trading hours, supported by clear notification / communication of these, is important to position the region as a reliable and quality destination during its operating times. To support expansion of trading hours, targeted attraction strategies for specific markets such as corporate and international travellers could be considered.
- **The growth of cycling:** The region's cycling and mountain bike trails are rated some of the best- and well-known experiences among WA cycle tourists, however, are relatively unknown to interstate visitors. Cycling is a growing market with research showing cycle tourists often spend significantly more per visit than average tourist during and an opportunity exists to provide larger-scale accommodation for cycling events that attract interstate competitors. As such the region has been identified as a primary recreational mountain biking destination for the Perth and Peel region, of high priority and national significance.
- **Local and State planning:** Local planning frameworks and strategies in the area primarily seek to ensure that future land uses, development and subdivision do not harm the general amenity of the area including tourism-related activity. The frameworks purposefully limit urban-type zonings – and associated variety of land uses and lot sizes – within the area to protect the natural landscape's visual qualities – a major reason tourists visit the area. Notwithstanding this, there has been a recognised need and desire to balance the value placed on natural assets with tourism-led economic outcomes for the region within locally-led strategic planning directions.

There is an opportunity to facilitate change by strategically encouraging sustainable and sensitive tourism development through local planning frameworks and shared policies while preventing the 'over development' of the tourism industry across the Hills region.

Local planning strategies recognise the many barriers and limitations to developing tourism uses in the area, with particular reference given to planning for bushfire, and public drinking water source protection areas. Advice provided by state and local government agencies regarding tourism development potential is perceived to at times be inconsistent which can lead to uncertainty amongst local landowners and applicants.

- Bushfire control is recognised as a key consideration in new development. Key issues that arise in regard to new tourism developments relate to road access and capability of supporting increased visitor numbers. Leveraging new planning scheme aims, objectives, local planning policies and mapping tools to support tourism development are considered to assist in reducing bushfire risk in planning for land use and development; and
- Drinking water source areas present unique challenges for tourism development; where development is proximate to these, strict conditions regarding wastewater treatment and disposal can result in unfeasible proposals. A land use and water management strategy was prepared by the Western Australian Planning Commission for the adjoining Middle Helena Catchment Area in recognition of its catchment-specific challenges and opportunities regarding drinking water source protection.
- Opportunity exists to provide consistent information to prospective tourist operators with the view to clarify the development approval process. Information being developed by Tourism WA through the State Government's *Tourism Attraction Case Management Framework* has the potential to assist local government authorities with this.

DOCUMENT REGISTER

Acronyms:

DPLH	Department of Planning, Lands and Heritage
CoA	City of Armadale
CoK	City of Kalamunda
SoM	Shire of Mundaring
SoSJ	Shire of Serpentine-Jarrahdale
TWA	Tourism WA

#	Document	Organisation	Year of publication
1	Pickering Brook and Surrounds Sustainability and Tourism Strategy Scope	DPLH	2019
2	Perth Hills Tourism Audit	TWA	2019
3	Two Year Action Plan for Tourism in WA	TWA	2018
4	Perth Destinations Perceptions Research and Framework	TWA	2014
5	Taste 2020: A Strategy for Food and Wine Tourism in WA	TWA	2015
6	Cellar Door Capacity Building Program Report	TWA	2018
7	Local Planning Strategy	CoA	2016
8	Local Planning Strategy	CoK	2010
9	Perth Hills Rural Study	CoK	2014
10	Economic Development Strategy	CoA	2018
11	Economic Development Strategy	CoK	2018
12	Economic Development Strategy	SoSJ	2018

#	Document	Organisation	Year of publication
13	Tourism Destination Strategy	CoA	2019
14	Tourism Development Strategy	CoK	2019
15	Tourism Strategy	SoSJ	2018
16	Segmenting the Cycle Tourism Market Consumer Research Report	TWA	2018
17	Bicycle Plan	CoK	2017
18	Perth Hills Trail Loop Concept Design Report	CoK	2012
19	Perth and Peel Mountain Bike Master Plan	WestCycle	2017
20	Two-year action plan for nature-based tourism in Western Australia	DBCA	2019
21	Priority Nature-Based Tourism – Project Profiles for Western Australia	DBCA	2019

1. Pickering Brook and Surrounds Sustainability and Tourism Strategy Scope, DPLH, 2019

The Pickering Brook and Surrounds Sustainability and Tourism Strategy (PBSSTS) scoping document outlines the purpose of the project, key objectives, benefits, deliverables and timeframes.

The PBSSTS project will *“investigate planning and economic development related opportunities, constraints and options to revitalise the Pickering Brook townsite and surrounding area and utilise the findings to develop a sustainable planning and tourism strategy with recommendations to be considered by Government.”*

Objectives:

- Develop a sustainable planning and tourism strategy for Pickering Brook and surrounding area to improve the agricultural and tourism economies and potentially revitalise the Pickering Brook townsite;
- To progress the identification/review of priority agricultural land within Pickering Brook and surrounding areas so this information can inform future decision making regarding potential loss of productive agricultural land; and
- To resolve the Pickering Brook Planning Investigation Area identified by the WAPC's 2018 North-East Sub-Regional Framework (Framework).

A Taskforce and Working Group have been established to guide development of the PBSSTS. Key deliverables include:

- Tourism product audit, and gap and opportunity analysis;
- Social, economic and environmental context and trends analysis;
- Priority agricultural land assessment – plan; and
- Pickering Brook and Surrounds Sustainability and Tourism Strategy.

Key Findings and Implications

- The Study Area was identified for urban expansion however planning constraints – bushfire risk, water catchment requirements etc - prove this to be unfeasible;
- Agri-tourism has been identified as a potentially more viable alternative to revitalise the townsite and area;
- Finding and recommendations will provide a framework for improved decision making and landowner certainty; and
- This Tourism Product Gap Analysis project will be a key informing document for a Tourism Development Strategy and overarching Sustainability and Tourism Strategy to inform future planning, including review of the Western Australian Planning Commission (WAPC)'s North-East Sub-regional Framework.

2. Perth Hills Tourism Audit, TWA, 2019

The audit identifies the range of tourism products present across the Perth Hills region, using 3 of the 5 A's of Tourism as categories, namely:

- Accommodation;
- Attraction;
- Activity; and
- Attraction and Activity (for those representing a mix of the two).

A database includes each product's name, address, website and a short description, supported by a series of maps showing products across the entire region and within each LGA.

	Perth Hills region	City of Kalamunda	Shire of Mundaring	City of Armadale	Shire of Serpentine-Jarrahdale
Accommodation	43	17	15	9	2
Attraction	50	26	7	5	12
Activity	20	5	8	5	2
Attraction / Activity	19	6	7	4	2
Total	132	54	37	23	18

Within the PBSSTS Study Area, 34 products were identified across the Cities of Kalamunda and Armadale as follows:

- Accommodation: 9 (bed and breakfasts, cottages, guest houses);
- Attraction: 16 (wineries, cideries, food produce, gardens);
- Activity: 3 (train ride, camel ride, bike tour); and
- Attraction / Activity: 6 (fruit picking, food market, festival).

Key Findings and Implications

- The Audit illustrates a diverse mix of more than 130 products across the region, with a concentration of offerings located within the City of Kalamunda;
- A strong base exists from which to introduce additional products; and
- Within the PBSSTS Study Area, a noticeable lack in variety of tourism activities, and diversity of accommodation options (e.g. hotel) indicates potential areas for expansion.

3. Two Year Action Plan for Tourism in WA, TWA, 2019

The Action Plan intends to grow visitor numbers to the State throughout 2018 and 2019 by positioning WA as the “most desirable leisure and business events destination in Australia.”

Four key areas are identified:

1. Positioning the State as Australia’s western gateway;
2. Promoting Perth as an affordable, vibrant destination close to nature;
3. Attracting more people to regional WA; and
4. Intensifying promotional activity in target markets to encourage travel.

The Plan was informed by stakeholder consultation, changing market conditions, Perth urban and cultural transformation and the State Government’s \$435m commitment to destination marketing and events.

Highlights include:

- Maximising leisure visitation from AFL games at Optus Stadium (18,000 additional visitors a year);
- Encouraging stopovers and regional dispersal from Qantas’s London-Perth route;
- Attracting more overseas direct flights to Perth;
- Securing and hosting major travel trade events; and
- A new home-grown Perth event in 2019.

Key Findings and Implications

- The State Government is strategically supporting various industries including tourism as a way of diversifying WA’s economy from its heavy reliance on mining;
- The Perth Hills region has an opportunity to capitalise on the Plan’s strategy to promote Perth as an affordable, vibrant destination close to nature; and
- Note: Visitation data from June 2019 shows an increase in local and domestic visitor numbers and spend, driven by large sporting and cultural events leveraging Perth’s new Optus Stadium and RAC Arena. Overseas visitor numbers continue to stall or decrease.

4. Perth Perceptions Research and Framework, TWA, 2014

The research project's insights provide Perth with a framework for identifying and understanding its relative strengths and weaknesses, informing strategies to maximise visitation. Feedback from Perth, regional WA, Sydney and Melbourne indicates *"Perth is a generalist destination – it has a good number and variety of experiences but lacks uniqueness or distinctiveness from other Australian cities. In its favour are the integration of nature and city and the diversity of experiences on offer within easy reach of the city centre."*

Perth is best known for beaches, wine, hot weather and the Swan River. Primary motivations to visit are events, good airfares, and visiting friends and relatives. Barriers are no unique proposition, more attractive competitors and a lack of value.

Potential strategies to increase visitation include:

- Emphasise nature within the city to differentiate Perth from other Australian cities;
- Reach a critical mass of experiences through product development and marketing;
- Framing Perth as the setting for an "urban adventure," raising the energy of its product offer;
- Promote unique aspects of experiences and emphasise ease and accessibility; and
- Promote "Perth Plus" itineraries that pair Perth with more unique destinations.

Key Findings and Implications

- Relevant to Perth Hills, Perth's appeal is driven by its natural beauty and connection between nature and the city, diverse range of experiences within easy reach, ease of accessibility, welcoming climate and a relaxed, uncrowded feel;
- Perth's weather and wineries are identified as strengths to leverage while breweries and cideries are an opportunity to build; and
- Development of more products to reach a critical mass with a focus on unique experiences, especially those that celebrate 'nature within the city' and 'urban adventure' represent opportunities for Perth Hills.

5. Taste 2020 - A Strategy for Food and Wine Tourism in WA, TWA, 2015

The Strategy's purpose is to strengthen WA's position as an internationally-recognised destination for gourmet produce, fresh seafood, premium wines and boutique beverages – craft beers, cider and spirits. It provides a framework to align and develop new initiatives to elevate the State's tourism, wine, agricultural and fishing industries.

Extensive research verified the importance of food and wine to WA's overall tourism offering, and as one of the fastest growing drivers of tourism worldwide. Almost all tourists want to experience regional specialties / authentic local produce in spectacular surroundings. Consumer demands of food and wine experiences are categorised into natural beauty, casual dining, provenance, value for money and accessibility.

The following strategic priorities were developed:

- **Appropriate regulatory settings** – shorten supply chains, preserve biosecurity and quarantine measures, branding to promote high quality produce and provenance;
- **Improving standards and quality** – industry training programs to develop service capability, awards for high-performing operators, expanded uptake of accreditation;
- **Creating new tourism experiences** – education program for new agricultural and Aboriginal businesses, culinary trails, Aboriginal cultural experiences, improved access, wayfinding and telecommunications infrastructure;
- **Festivals and events** – grow and elevate priority events (e.g. Margaret River Gourmet Escape), support regional events, tourism event marketing / calendar, trade engagement; and
- **Promotion and marketing** – build on State tourism brand, close perception gap between visitors and non-visitors, focus on major export markets, package culinary tourism with existing activities, experiences, events.

The Perth Hills region is identified as a distinct WA wine region and described as being *“renowned for its national parks and some of the State's top walk and cycle trails ... complemented by a range of wineries; organic produce from the orchards; and many country inns, tearooms and cafés”*.

Key Findings and Implications

- Concerted efforts have been outlined to expand the profile, quality and capacity of WA's wine regions beyond Margaret River;
- Visitors to the Perth region rate their satisfaction of wine and food tourism as average and of medium importance to their whole experience;
- Relevant opportunities include events (Perth Hills Wine Show, Bickley Valley Harvest Festival) and experiences (tastings, tours, masterclasses, picnics, Bickley Valley Wine Trail).
- A series of 33 food and wine trails, including the Perth Hills Cider and Brews Trail have been developed with the assistance of Tourism WA across the State.

6. Cellar Door Capacity Building Program Report, TWA, 2018

The Program helped wineries, breweries and distilleries recognise and build upon their tourism potential and deliver high-quality cellar door experiences. Key program objectives aligned with TWA's Taste 2020 Strategy objectives of:

- Ensure businesses across the State can deliver their tourism potential;
- Deliver new visitor experiences; and
- Deliver consistently high levels of customer service.

More than 120 predominately wine producers across the Swan Valley, Peel, South West and Great Southern, and Perth Hills wine regions took part. 93% of participants operate a cellar door with 4% intending to do so. 55% were open every day, lower than the national average of 62%.

64% of those not open every day are very small producers, and most are located outside the two major wine tourism regions (Margaret River and Swan Valley), indicating the limited trading hours are likely a combination of resource availability and visitor demand.

Key challenges faced include accessibility, adequate staff service skills and knowledge, and the need for stronger regional promotion, brand awareness and sales conversion. There appears to be a lack of destination awareness of WA wine regions apart from Margaret River. Destination marketing is required to address this, including a focus on unique products, experiences and stories – familial connections, provenance etc.

Cellar doors are rapidly expanding their repertoire of onsite facilities and service offerings to meet the needs of visitors seeking a greater range of experiential activities in a single location – tasting areas, merchandise, local produce and food.

Key Findings and Implications

- A core number of producers need to open as often as possible and maintain consistent trading hours in order to become a wine tourism destination;
- Consistent distribution of week-day visitors is a primary issue for Perth Hills operators; weekend peak demand and visitor traffic can compromise the overall visitor experience;
- Operators would benefit from developing experiences and price points that increase yield and improve visitor distribution; and
- The Swan Valley and Perth Hills regions would benefit from targeted campaigns and attraction strategies aimed at increasing mid-week visitation, especially among the corporate and international markets.

7. Local Planning Strategy, CoA, 2016

The City of Armadale's Local Planning Strategy (LPS) reflects strategic planning intent for the local government area with a 10 year horizon to 2025.

The LPS identifies the Darling Ranges and Scarp as one of the most distinctive geographic features of the City and provides a local tourist destination, with some areas remaining under productive horticulture however other rural enterprises are generally small-scale.

Over time, Rural zoned land has diminished through changes in land use and subdivision, meaning the remaining rural areas in the Armadale Hills will be increasingly valued in the future. Developmental pressures here face potential negative impacts on the visual landscape qualities of the hills. The LPS seeks to contribute the City's economy by providing sites for tourism accommodation and facilities, taking account of their special locational and servicing needs.

With regards to bushfire, Armadale's LPS proposes to reduce bushfire risk in planning land use and development through the LPS and scheme review processes by:

- Adding new aims and objectives to the Local Planning Strategy – to reduce and minimise bushfire risks and impacts in new areas of closer subdivision and development.
- Preparing a new local planning policy guided by State Planning Policy 3.7: Planning for Bushfire Risk Management and the 2015 updated Planning for Bushfire Risk Management Guidelines, to reduce bushfire risks in closer subdivision and development, including implementation of AS3959 Construction Standards on existing lots subject to an application for a building permit.
- Using the City's GIS Intramaps mapping tool to incorporate information on mapping of potential bushfire hazard, bushfire-prone land and to assist in operational planning and building permit assessments.

Key Findings and Implications

- The City's future Scheme will continue to provide opportunities for Bed and Breakfast and other Holiday Accommodation in scenic Rural and appropriate Urban areas, however there is a lack of larger scale accommodation options;
- Landscape visual qualities must be balanced with tourism-led economic outcomes;
- Land use activities such as aquaculture, viticulture and cellar door type wineries will be encouraged, although it appears the Rural and Urban zonings are limited within the Hills area to accommodate these activities; and
- Bushfire has been recognised as an important consideration of new development, with new aims, objectives, planning policies and mapping tools seen to aid in reducing the bushfire risk in planning for land use and development.

8. Local Planning Strategy, CoK, 2010

A key aim of the City of Kalamunda's LPS is to ensure that the sustainable growth of the tourism industry continues into the future without compromising its businesses and attractions. The hills wine trails are highly valued and the LPS seeks to ensure that future land uses, development and subdivision does not harm the general amenity of the area by limiting urban-type zonings (and the associated variety of land uses and lot sizes) within the area.

A review of tourist accommodation in the area reveals options are predominantly bed and breakfast, suggesting a lack of diverse accommodation options such as hotel, hostel, resort-style accommodation or caravan and camping options. This is similar to City of Armadale.

Key Findings and Implications

- The Kalamunda Town Centre is the most recognised tourism precinct within the City and provides a starting point for most visitors wanting to learn the history of the area; and
- Landscape visual qualities and rural amenity must be balanced with tourism-led economic outcomes, by limiting urban-type zonings in the Hills wine trails region.

9. Perth Hills Rural Study, CoK, 2014

Orchard productivity in the Kalamunda Hills area has been steadily declining due to changes in climate and family structures, rising costs of production, lower water and chemical availability and depressed and volatile market prices. The Hills Rural Study (Study) was prepared to address increasing requests from landowners for land use planning changes. The Study's aim is to preserve the orcharding industry in the Kalamunda Hills in the long term. Its objectives are to:

- Allow traditional growers more flexibility in land uses;
- Encourage additional land uses ancillary to the primary horticultural production;
- Review zoning including a potential for future subdivision in the area;
- Create incentives and support horticultural production in the area;
- Protect rural character of the area through landscape protection; and
- Protect the quality of water.

The Study includes:

- A review of CoK and State Government strategic and statutory planning documents;
- A contextual investigation of the area's land uses, demographics, environment and infrastructure;
- Findings of an economic development discussion paper; and
- An analysis of over 300 public and State Government Agency submissions;

Key findings:

- Land for agricultural production and economic viability of orcharding are in decline;
- A majority of landowners:
 - Wish to remain in the area and pass land onto their children;
 - Are overwhelmingly supportive of land-use planning changes to facilitate subdivision, provided rural character is retained;
 - Are supportive of agri-tourism and view the area as the 'next Swan Valley'; and
 - Believe economic development initiatives would not be effective and are not interested in collaboration with the City or State Government on these matters;
- State Government agencies:
 - Protect high quality agricultural land and land within drinking water source areas through State Planning Policy;
 - Do not support subdivision, considering this to detrimentally impact agricultural productivity;
 - Identify bushfire threat as a major issue, likely to restrict future development; and
 - Are generally supportive of Scheme amendments to provide landowner flexibility provided no adverse impacts on agricultural and water resources;
- Shire of Augusta-Margaret River and Hawkesbury Harvest provide successful examples of expanded agri-tourism development.

Agri-tourism

While there is clear definition, typically agri-tourism is considered to be an activity undertaken on a working farm which adds value or generates income to the farm;

- Limited understanding of benefits, which include:
 - Viable option to supplement core income;
 - Reduce risk / exposure to negative trends / factors;
 - Diversification brings 'new money' into region, stabilises local economy;
 - New employment opportunities, retain family members in region;
 - Improved productivity - resources used for recreation without major shift in farm production;
 - Preservation of local customs, heritage, culture, and lifestyle; and
 - Cultural exchange and stronger local pride;
- Disbenefits include:
 - Failed agri-tourism ventures if product is not advanced, site is isolated;
 - Demand on public utilities and infrastructure – water, waste, utilities, roads etc.;
 - Seasonal employment can lead to higher local under/unemployment;
 - Inflation of property values, price of goods and services;
 - Crowding, congestion, pollution, anti-social behaviour, cultural clash;
 - Loss of land conservation, heritage and natural sites due to development; and
 - Loss of priority agricultural land.

Five levels of agri-tourism have been identified:

Level	Description	Example
1	Use not related to agriculture on former agricultural lot	Chalets
2	Non-agricultural use on working farm	Chalets
3	Indirect contact with agricultural use on working farm	Restaurant serving farm produce
4	Direct contact with agricultural use on working farm	Viewing activities
5	Direct contact and interaction with agricultural use on working farm	Farm hand, feeding, picking fruit etc

Key Findings and Implications

- Broad support exists among landowners and the State Government for new and expanded agri-tourism uses;
- A substantial majority of the community supports further subdivision or land-use zoning changes (largely due to financial benefit);
- Subdivision to less than 4ha would compromise major State Government policy to protect agricultural potential and drinking water sources; and
- Bushfire threat is a major issue and likely to restrict future development.

The Study recommends the City:

1. Implement a Local Planning Scheme 3 Amendment to:
 - a) Rationalise rural zones;
 - b) Introduce new permissible land uses to increase landowner flexibility – e.g. agri-tourism; and
 - c) Introduce a new 'Priority Agriculture' zone over land which is deemed to be of State, regional or local significance for food production purposes;
2. In collaboration with WAPC and DAFWA, delineate the boundaries of the new 'Priority Agriculture' zone through further investigation into the area's agricultural productivity. The City to consider subdivision options following determination of Priority Agriculture Zone boundaries; and
3. Support landowners to implement economic development initiatives that diversify and improve agriculture/horticulture viability.

10. Economic Development Strategy (EDS), CoA, 2018

The EDS responds to the City of Armadale's impressive growth and evolution into an economic and business hub in the Perth Metropolitan Region. Consistent with CoA's corporate and community planning objectives, the Strategy articulates a plan of action for CoA to play its role in improving economic and social conditions by stimulating, attracting and maintaining business activity, investment and employment.

The EDS's vision is "to have a vibrant and sustainable economy that provides a diversity of jobs and investment opportunities." An economic development framework comprises three major pillars, under which a series of actions are identified:

- Encourage Investment and Infrastructure;
- Promote Armadale; and
- Support Businesses.

Key Findings and Implications

- Tourism is identified as a key growth area with considerable potential for investment in infrastructure and experiences such as the following opportunities:
 - Leveraging the Armadale region of the Perth Hills;
 - A new short-stay accommodation product in the City Centre; and
 - Development of a tourism industry investment profile of current opportunities and business cases for special projects.

11. Economic Development Strategy (EDS), CoK, 2018

The CoK EDS outlines a vision, five strategic priorities (one of which covers tourism) and an action plan.

Vision: “The City of Kalamunda is a business destination spoilt for choice with a diverse mix of natural assets and employment drivers that complement each other in delivering locally sustainable jobs and businesses.”

The emerging tourism industry is identified as a strategic asset.

- Since 2013, Kalamunda welcomed an average of 295,000 visitors annually (75% day visitors, 22% domestic overnight visitors, 3% international visitors) with average visitor growth of 8.7% per year;
- Strategic actions to convert day visitors to overnight visitors will increase visitor spend and catalyse investment in tourism products and experiences; and
- Kalamunda attracted only 2% of total visitors to the Perth region compared with 6% to City of Swan.

Focus areas for tourism industry development have been identified as follows:

Focus Area	Priority actions
Product Development	<ul style="list-style-type: none"> • Address accommodation gaps; • Diversify product offerings – identify sites, liaise with investors and State agencies to facilitate; • Revitalise ‘tired’ attractions; and • Assist proponents through regulatory process.
Destination Marketing	<ul style="list-style-type: none"> • Develop destination marketing plan, identity and brand; • Marketing strategy in partnership with industry / Perth Hills LGA’s – digital channels, unique content, events guide etc.; • Address perceived proximity barrier; and • Develop / promote mix of packages – self-drive tours, itineraries, cycle tourism.

Focus Area	Priority actions
Destination Management	<ul style="list-style-type: none"> • Develop partnerships – TWA, Destination Perth, Perth Hills LGAs, local providers; • Support industry-led network – information sharing, collaboration; • Improve accessibility - co-ordinated signage, expanded public transport; and • Support Perth Hills Visitor Information Centre.

Potential offerings identified to build on strengths / address gaps in the City’s tourism offer include:

- Accommodation: quality branded hotel, serviced apartments, farm stays, spa and wellness retreats (including day activities);
- Attractions:
 - Evening: night sky attraction, photography, astrology;
 - Active recreation: trails – horse riding, mountain bike, hiking, upgraded rail trails; and
 - Other: farmgate sales, revitalised public realm / heritage assets, outdoor cinema, conference facilities;
- Activities:
 - Art and culture: photography, art studio trail, movie trail, film festival;
 - Horticulture – flower shows, wildflower festival;
 - Recreation: marathon, geo-caching and orienteering; and
 - Commercial: wine trail operator, village market tours, agri-tourism education;
- Management: extended trading hours/days.

Key Findings and Implications

- Tourism is identified as a key plank in the diversification and growth of CoK’s economy
- Priority product development directions include: new accommodation offerings, active recreation infrastructure, commercial offerings – farmgate sales, tours, horticulture

12. Economic Development Strategy, SoSJ, 2018

The SoSJ Economic Development Strategy (EDS) identifies competitive advantages, clusters and growth opportunities, and provides strategies and a 5-year detailed action plan to deliver on community aspirations and goals for future economic growth.

- Fastest growing LGA in the nation;
- Tourism investment and infrastructure identified as key opportunity and competitive advantage
 - 200,000 tourism visitors every year; and
 - Accommodation, trails, events, nature-based/adventure tourism products/ experiences, including wellness tourism;
- Tourism-related actions are identified as follows:
 - Support new ventures including agri-tourism opportunities;
 - Encourage new tourism accommodation;
 - Tourism marketing and promotions;
 - Develop trails for mountain biking, motor cycle, horseback riding and hiking; and
 - Examine possibility for Motorsports Complex.

Key Findings and Implications

- Tourism is identified as a key growth opportunity for the Shire; and
- Strategies and actions relevant to the Perth Hills region include new accommodation, agri-tourism and trails development.

13. Tourism Destination Strategy (TDS), CoA, 2019

The TDS illustrates the Perth Hills Armadale strategic positioning in light of the evolving Perth tourism market, a SWOT analysis and consideration of relevant tourism trends. It proposes a Place Proposition and place brand positioning framework, four strategic directions and an action plan, aligning with the CoA EDS (see above) and Strategic Community Plan.

Place Proposition: A convenient city escape offering nature, adventure and locally-grown experiences in a picturesque, memorable setting

Strategic directions and priority actions have been identified as follows:

Strategic direction	Focus areas
Destination Branding	<ul style="list-style-type: none"> Alignment with Perth Hills Tourism Alliance (PHTA), wayfinding signage, industry marketing suite, promotion of 'visitor ready' experiences/packages.
Digital Presence	<ul style="list-style-type: none"> Digital strategy and platform investment – website, social media, integration with PHTA channels.
Product Development	<ul style="list-style-type: none"> Identify and facilitate signature experiences, niche agri-tourism, eco-tourism, indigenous cultural tourism, soft adventure and evening economy experiences.
Partnerships and Enablement	<ul style="list-style-type: none"> Build strategic relationships with government, industry and local businesses/operators.

The Action is structured on the EDS's three key pillars as follows:

EDS Pillar	Priority Actions
Encourage Investment and Infrastructure	<ul style="list-style-type: none"> Leverage existing strengths to diversify and expand tourism product in the region.

EDS Pillar	Priority Actions
Promote Armadale	<ul style="list-style-type: none"> Develop collaborative destination marketing to raise awareness / appeal, showcase experiences, services and attractions; Identify new signature regional experiences; and Deliver high-quality visitor servicing, measure destination branding.
Support Businesses	<ul style="list-style-type: none"> Strengthen relationships with the tourism industry, state government and business community; and Build region's reputation through industry development programs and training.

Key Findings and Implications

- The TDS identifies key product development opportunities including:
 - Signature experiences: Autumn events, Five Dams Bike Race, Cider, Food and Wine Trail;
 - Soft adventure: hiking, mountain biking, bridle trails, treetop walk, heritage trail;
 - Indigenous experiences: Walking 'On Country', sharing knowledge / culture;
 - Agri-tourism experiences: 'Meet the Maker,' farm gate to plate, fresh produce;
 - Evening economy: astronomy, photography, wildlife; and
 - Amenities: wayfinding, essential infrastructure – toilets, information bays;
- Product development needs to be complemented by co-ordinated destination marketing and branding, aligning with strategies and branding across the Perth Hills region.

14. Tourism Development Strategy (TDS), CoK, 2019

Developed following extensive community-led process – Tourism Community Reference Group, workshops etc. and has a close alignment with City plans / strategies.

The City's tourism development vision is *"To establish the City of Kalamunda as a major tourist destination with a sustainable and vibrant future."*

#	TDS Strategy	Strategic focus areas
1	Create and maintain welcoming, inclusive and accessible facilities for visitors to enjoy the natural and built environment	1.1 Improve visitor access to and navigation between key attractions, precincts and services; 1.2 Provide accessible and robust tourism support services that exceed visitor expectations; and 1.3 Develop diverse and unique accommodation offerings that encourage visitors to stay longer.
2	Leverage Kalamunda's natural beauty and award-winning attractions to grow destination appeal and recognition	2.1 Enhance Kalamunda townscape to create vibrant and engaging "rural village" atmosphere; 2.2 Promote key attractions that secure Kalamunda's reputation as a premier tourist destination; and 2.3 Preserve and celebrate the natural environment through eco-sensitive outdoor adventures.
3	Develop arts, heritage and culture opportunities that engage creative investment, participation and community pride	3.1 Advance Kalamunda as a thriving arts, heritage and cultural hub within the Perth Hills; 3.2 Lead authentic and culturally aware Aboriginal tourism experiences; and 3.3 Expand Special Events program to offer diverse, stimulating and globally recognised programs.
4	Further develop the Kalamunda tourism brand and destination marketing to raise awareness and inspire visitor interest	4.1 Foster strong awareness and recognition of the Kalamunda brand; 4.2 Work towards cohesive and connected regional Perth Hills branding and marketing; and 4.3 Increase Kalamunda's share of local, intrastate, interstate and international tourism markets.
5	Encourage an innovative and collaborative tourism industry that supports local business and drives economic growth	5.1 Provide dedicated and industry-specific support services for local tourism operators; 5.2 Foster strong partnerships with key stakeholders, industry bodies and local community; and 5.3 Lead innovation through creative collaboration and progressive forward-thinking ethos.

15. Tourism Strategy, SoSJ, 2018

The Strategy was developed through market demand and gap analysis, SWOT analysis, competitive review and consultation. Eight key areas were identified to “transform Serpentine Jarrahdale into a high-ranking day-trip and holiday destination”:

1. Branding and wayfinding;
2. Trails network expansion;
3. Food tourism;
4. Equine tourism;
5. Natural, cultural and historic attractions;
6. Adventure tourism;
7. Accommodation; and
8. Events.

Key Findings and Implications

The majority of tourism product development opportunities within the Perth Hills Region centre around Jarrahdale, including:

- Potential to develop into equestrian trails capital;
- Transformation into Trail Town;
- Development of major new accommodation and activity hub:
 - caravan and camping; and
 - wellness retreat and spa;
- Promotion of farm stay accommodation.

16. Segmenting the Cycle Tourism Market Report, TWA, 2018

The Report uses a large national survey sample to analyse the domestic cycle tourism market. It delivers a more granular understanding and segmentation of the market, including the size and potential of two main segments identified in the draft 2018 WA Cycle Tourism Strategy.

From 2015-2018, almost 30% of Australians had a holiday that involved cycling while 7% of Australians had such an experience in WA. 26% of West Australians had a daytrip in WA involving cycling with the Perth region and South West being the two most popular destinations. In 2019 and 2020, 35% of respondents intend to have a cycle tourism experience. 10% of Australians report planning to have a cycle experience in WA while one third of locals plan to have a daytrip involving cycling.

The Report breaks down the cycle tourism market into four profiles of Cruisers, Achievers, Explorers and Socialites. Identified opportunities relevant to Perth Hills include:

- Family-friendly packaged bundles – e.g. bus tour with cycle component;
- Destination marketing via cycle apps – e.g. Strava – and cycle clubs;
- Development of more challenging mountain biking trails, and promotion through mountain biking websites, apps and clubs; and
- Bundling of cycling with adventure tourism experiences – sky diving, scuba diving etc.

Key Findings and Implications

- Locals' knowledge of WA cycle experiences – trails and events – is much higher than interstate knowledge;
- The Perth Hills cycle trails, Kalamunda mountain bike trail and Munda Biddi trail rate as 3rd, 4th and 6th most known among WA cycle tourists;
- 39% of locals and 14% of interstate respondents rated Perth Hills cycling as excellent;
- More than half of interstate respondents didn't know enough about Perth Hills cycling to be able to rate it; and
- 48% of local and 72% of interstate respondents surveyed didn't know enough about the Munda Biddi trail to be able to rate it.

17. Bicycle Plan, CoK, 2017

The City of Kalamunda's Bicycle Plan is a comprehensive strategy that seeks to promote cycling within the City by providing the research and local actions to enable cycling infrastructure and programs to be planned and funded.

The Bicycle Plan presents the City's 'Ultimate Cycling Network', developed in alignment with the Department of Transport's Transport Plan @ 3.5 Million Cycling Network, which includes dedicated 'Tourist Trails' through the study area. Tourist Trails are defined by the Plan as long-distance, unsealed riding experiences through natural settings and away from vehicles, and are intended to complement the existing mountain biking facilities which already attract visitors from interstate by connecting recreational and tourism trips.

Through this (and other site- and program-specific actions), the Plan seeks to overcome the key barrier to encouraging greater cycle tourism in the City, which is the condition of the cycling network and the lack of clearly defined, high quality touring routes.

Key Findings and Implications

- Cycling tourism is a growing market in Australia and one that is yet to be fully capitalised upon in WA, with research showing that cycle tourists often spend significantly more than the average tourist; and
- The Plan sets out site- and program-specific actions to improve the quality and connectiveness of trails throughout the CoK to encourage more cycling in the area.

18. Perth Hills Trail Loop Concept Design Report, 2012

The Perth Hills Trail Loop Concept Design Report was commissioned to respond to two recommendations of the Perth Hills Trail Master Plan:

- Improve the link between Kalamunda, Bickley and Pickering Brook areas for both walkers and cyclists; and
- Create a link through the western end of the Helena Valley between the northern area of Kalamunda and Railway Reserve Heritage Trail to enable a complete Mundaring to Kalamunda Loop Trail.

The Report reviews number of unsanctioned trails to assess their suitability for formal mountain biking trail loops.

Key Findings and Implications

- The design development of a link trail between the Kalamunda Town Centre and the Kalamunda Trail Network, including Pickering Brook, Munda Biddi Trail and the Mundaring Railway Reserve Heritage Trail;
- Includes development details, costing and implementation plan; and
- Many recommendations are beyond the capacity of local governments, requiring alternative funding sources.

19. Perth and Peel Mountain Bike Master Plan, WestCycle, 2017

The Perth and Peel Mountain Bike Master Plan has been prepared by cycling peak body, WestCycle to guide future strategic investment in mountain bike recreation, tourism, and event development across the Perth and Peel regions of WA.

The Master Plan identifies the 'Perth Hills Trails' as a high priority location with 'national significance', and envisions the Perth Hills Precinct as the primary recreational mountain biking destination for the Perth and Peel region (due to having the most appropriate terrain, existing reputation, character and being located close to metropolitan areas). Nationally significant locations capture the tourism market for at least a week of unique riding and can provide a large recreation resource for a major population centre.

Some 120km of mountain biking routes (of various modes) are recommended for development within the Perth Hills Precinct following consideration of a number of constraints, namely conflicting land uses and drinking water protections zones, disease risk areas, Aboriginal and non-Aboriginal heritage sites, tenure and management and potential conflicts with other recreational users such as horse riders, motorbikes, walkers and four wheel drives.

For national events (being identified as a precinct with national significance), venue locations are generally chosen with consideration given to nearby attractive accommodation options (min. 1,000 beds), wide range of visitor services (supermarket, medical centre, bike stores, take away food), mains power and running water, internet coverage, and easy freight access.

Key Findings and Implications

- The Perth Hills Precinct is identified as the primary recreational mountain biking destination for the Perth and Peel region, of high priority and national significance; and
- The recommended level of development in the Precinct however is beyond the capacity of the local governments. Additional funding, detailed location planning and land manager support is required to progress the recommendations of the Master Plan.

20. Two-year action plan for nature-based tourism in WA, DBCA, 2019 & 2020

Two-year action plan for nature-based tourism in Western Australia 1919/20 sets the ambition to make Western Australia the must visit nature-based tourism destination in Australia, leveraging DBCA's brands and attractions as high value tourism assets while preserving conservation obligations and principles. It focuses on development, access to, and promotion of the state's natural attractions as key tourism assets, through six key areas:

- Enhancing the State's natural attractions for visitors
- Improving access to the State's nature-based tourism destinations
- Aligning key attractions to target tourism audiences
- Developing nature-based accommodation and events
- Promoting Aboriginal culture and heritage
- Embracing digital technologies to innovate in visitor communications, marketing, sales and education.

The action plan also prioritises increased cooperation between the four DBCA entities and identifies common objectives for Parks and Wildlife Service, Rottnest Island Authority, Botanic Gardens and Parks Authority and the Zoological Parks Authority as well as partnerships with other government agencies including the Department of Jobs, Tourism, Science and Innovation, and private sector tourism operators.

Key Findings and Implications

- A key action is to make Western Australia a premier trails destination, highlighting development and promotion of mountain bike trails in Perth Hills
- Seeking opportunities for adventure tourism in Perth Hills is highlighted under the topline action 'continue to develop parks as tourism destinations by improving visitor facilities and increasing visitation to regional WA
- A range of actions relate to identifying and facilitating suitable nature based tourism accommodation options

21. Priority Nature-Based Tourism – Project Profiles for WA, DBCA, 2019 & 2020

The Priority Nature-Based Tourism Project Profiles 2019 and 2020 documents the key DBCA projects and other government nature-based tourism initiatives in the Two-Year Action Plan for Nature-Based Tourism in Western Australia 2019 and 2020 (see above).

A topline priority is identification of treetop adventure and zipline activities at Perth Hills, enabled under lease arrangement, with revenue assisting park management.

John Forrest National Park is identified as a revitalisation priority through improvements to visitor facilities, new roads and picnic areas.

Key Findings and Implications

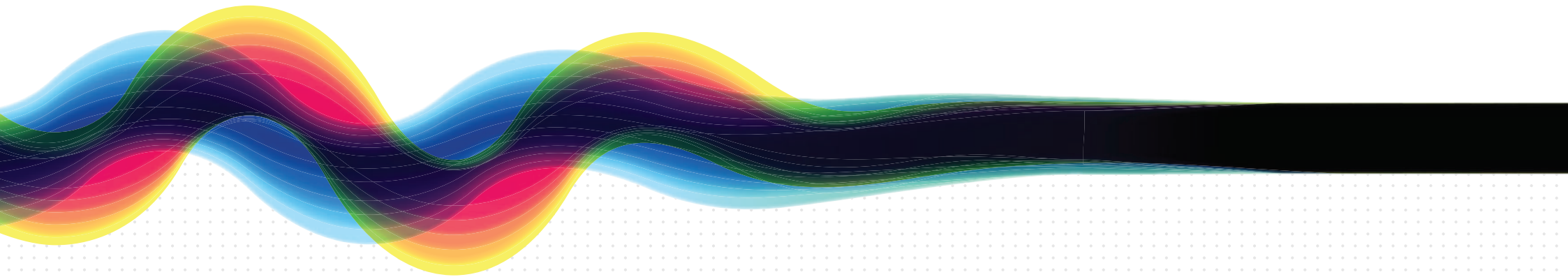
- Priorities for Perth Hills include adventure activities such as treetop courses offering flying foxes and aerial challenges. Opportunities would be offered through lease arrangements and revenue would contribute to park management; and
- DBCA has committed funds for stage 1 of the JFNP project with new roads and picnic areas to be completed by December 2020.

Appendix 2 – Tourism trends analysis

Perth Hills Tourism Product Gap Analysis

Tourism Trends – high level analysis

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Tourism Trends – high level analysis

Following comprehensive literature review of strategies, plans and reports consultation with government stakeholders and tourism businesses, a number of key trends have been identified.

The Experience Economy

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>At a global level, there is a growing trend towards valuing experiences and services in place of material products, in pursuit of joy and minimising consumption. For some it is also about defining personal brand and identity – a trend sometimes defined as ‘NOwnership.’</p> <p>This brings significant opportunity for tourism regions, with visitors looking to enjoy unique experiences in new destinations, where it is as much about the place as it is about the people met, unique encounters had, stories heard and produce sampled. This trend continues to reward operators and markets that work hard to provide distinctive, authentic and surprising products and services.</p>	<p>Perth Hills’ tight knit community of operators with deep connections to the region running across generations provides a strong base from which to diversify experiences unique to its setting.</p> <p>Visitors will seek experiences that provide a tangible sense of what it means to live and work in the region through encounters with family operators, sampling fresh produce and unique cuisines, and enjoying cultural activities.</p>	<ul style="list-style-type: none"> • Perth Hill Tourism Audit - further diversity of accommodation options is needed. • Taste 2020 – Framework to elevate and create new tourism experiences

Agri-tourism

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>Traditional agriculture operations across South West Western Australia are experiencing increasing financial pressures due to shifts in global markets, commodity prices and environmental constraints such as water scarcity and climate change.</p> <p>Where agricultural land close to metropolitan areas has been protected from transitioning into urban development, alternate opportunities have been explored including agri-tourism. This involves complementing existing agricultural operations with activities attractive to tourists, including farm gate sales, farm tours, meet-the-maker and pick-your-own produce activities, tasting trails, cafés, restaurants and accommodation, including farm stays and chalets.</p> <p>According to Australian Regional Tourism¹, between 2010/11 and 2015/16, the number of domestic tourists who visited a farm as part of their travels increased by an average of 9% p.a. There was an 11% increase in international visitors. The sector is currently worth approximately \$9.4 billion a year.</p> <p>1. https://regionaltourism.com.au/projects/agritourism/</p>	<p>Agri-tourism represents arguably the primary opportunity to diversify the local economy and bolster its ongoing sustainability, especially considering the constraints to expanded urban development represented by protecting priority water catchments areas and agriculture land, and minimising bushfire risks.</p> <p>While many established orchardists and growers would prefer to continue conventional operations, often next generations are less interested in following such careers involving hard physical labour. Agri-tourism offers an opportunity for these people to remain connected to familial businesses but through less arduous means. This trend is manifesting itself in many ways across the region with new restaurants, cideries, cellar doors and farm gate sales opening up.</p>	<ul style="list-style-type: none"> • PBSSTS – agri-tourism identified as core strategy to improve local economies and revitalise town site • Taste 2020 – Creating new tourism experiences – education program for new agricultural businesses • Perth Hills Rural Study, CoK, 2014 – local stakeholders supportive of agri-tourism and the area's potential as the next 'Swan Valley'

Cultural tourism

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>Tourist preferences have evolved significantly from visiting destinations and attractions designed with tourist needs at the forefront. Instead there is a growing desire to 'get off the beaten track' and experience the lifestyle and culture of local people. In addition to agri-tourism experiences, a growing number of tourists are seeking knowledge of a place's history beyond visiting museums or reading tour guides.</p> <p>This is particularly apparent for Aboriginal cultural experiences. In fact, according to Tourism WA² reports 82% of visitors would like to take part in an Aboriginal tourism experience however participation levels remain low at 26 per cent.</p> <p>² www.tourism.wa.gov.au/About%20Us/Growing_tourism/Aboriginal-tourism/Pages/Aboriginal-tourism-research</p>	<p>The recent Native Title Settlement covering the Noongar nation of SWWA represents many significant opportunities for Aboriginal empowerment and employment. The Indigenous Land Use Agreement is currently in development, which will extend opportunities for co-management of certain State conservation reserves among other elements.</p> <p>Improving capacity within the Noongar community to operate businesses represents a positive proposition for the Perth Hills region with tourism opportunities including, bush tucker harvesting and cooking schools, celebrations such as the Makuru Arts Festival, and walking on country such the Perth Observatory Cultural Day Tour operated by Aboriginal Nature Treks.</p> <p>The region's rich European heritage can be celebrated through targeted investment in heritage sites, development of walking trails with wayfinding and interpretive signage, and ephemeral cultural activities such as plays, concerts, events and festivals building on the success of the Kalamunda Markets and Bickley-Carmel Harvest Festival.</p>	<ul style="list-style-type: none"> • Taste 2020 - A Strategy for Food and Wine Tourism in WA, TWA, 2015 • Tourism Development Strategy (TDS), CoK, 2019 • Two-year action plan for nature-based tourism in Western Australia, DBCA, 2019 and 2020 •

Soft adventure

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>Many tourism regions across Australia are reaping the economic and social rewards of the growth of destination cycling tourism. Seen as a well-defined product and key travel motivator, an average of just over 350,000 overnight visitors to WA per annum undertook cycling while travelling according to WestCycle's Western Australian Cycle Tourism Strategy³.</p> <p>Local flow-on benefits of investment in mountain biking and road cycling are numerous including supporting growth in complementary recreational pursuits – hiking, camping, horse riding etc – and boosting local accommodation and hospitality sectors.</p> <p>In recognition of this many regional governments have developed strategic plans to guide, support and develop mountain bike projects.</p> <p><small>3 westcycle.org.au/western-australian-cycle-tourism-strategy</small></p>	<p>Perth Hills experiences the benefits of Perth's small yet rapidly growing mountain biking and road cycling community, who regularly visit the region over weekends. Regional cycle events including the Dams Challenge and establishing off-road cycle trails including the Munda Biddi Trail and Railway Reserve Trails. Further investment would unlock more of the region's picturesque landscapes and State forests.</p> <p>In addition to mountain biking and cycling tourism, water based activities and other soft adventure attractions such as ziplines and ropes courses are proving to be both complementary to this market, and unique attractions in their own right.</p>	<ul style="list-style-type: none"> • Segmenting the Cycle Tourism Market Report, TWA, 2018 • Bicycle Plan, CoK, 2017 • Perth and Peel Mountain Bike Master Plan, WestCycle, 2017 • Two-year action plan for nature-based tourism in Western Australia, DBCA, 2019 and 2020 • Economic Development Strategy (EDS), CoK, 2018 • Economic Development Strategy, SoSJ, 2018

Responsible tourism

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>Driven by the rise in conscious consumers, the trend towards responsible tourism reflects a growing global consciousness around consumption, eco-footprints and the importance of 'taking time out' to reconnect with self and nature at a basic level. Key opportunities point to restorative recreation, cultural immersions, green getaways and creative retreats.</p> <p>Visitors travel with the intention of 'doing good' and acting in a responsible way. As well as pursuing animal welfare goals, responsible tourism includes ensuring the economic and social wellbeing of local communities. Strategies include opting for locally owned accommodation, hiring local guides, and buying products fresh from their farms.</p> <p>Responsible tourism encourages visitors to explore beyond established tourism precincts and urban areas, spending time connecting with nature.</p>	<p>Given the region's high levels of protection from development and policy requirements to minimise impact on the environment, the opportunity to market the region as a responsible tourism destination is significant. New tourism ventures could be promoted as 'eco-minded' with buildings leaving a lighter footprint on the local eco-system and key landscape values protected by ensuring developments blend in with their surrounds and do not obscure or devalue key viewsheds.</p> <p>This is especially apparent for accommodation which may face difficulties gaining approval to construct large, concrete floorplates. Alternative accommodation options include glamping, Tiny Houses and products that manage waste on-site, circumventing water catchment protection requirements.</p>	<ul style="list-style-type: none"> • Tourism Strategy, SoSJ, 2018 • Economic Development Strategy, SoSJ, 2018 • Tourism Development Strategy (TDS), CoK, 2019

Niche accommodation

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>Similar to the drivers of the experience economy, discerning consumers and niche audiences are increasingly seeking unique accommodation products that offer a memorable and authentic stay.</p> <p>Tailored to different audiences and price points, these products generally offer a wellness / wellbeing component, local produce, low impact / low footprint performance, connection to outdoor / environment and / or will showcase unique local buildings and heritage assets.</p>	<p>The Perth Hills Tourism Audit indicates that there is currently a lack of diversity in the accommodation offer. Niche accommodation product opportunities would include:</p> <ul style="list-style-type: none"> • Glamping • Eco and nature-based tourism • Wellness retreats including spa • Farm stay or orchard stay • Hostel, caravan and camping • Larger scale accommodation product • Low footprint / high environmental performance 	<ul style="list-style-type: none"> • Perth Hills Tourism Audit, TWA, 2019 • Local Planning Strategy, CoA, 2016 • Economic Development Strategy (EDS), CoK, 2018 • Economic Development Strategy, SoSJ, 2018 • Tourism Development Strategy (TDS), CoK, 2019 • Perth and Peel Mountain Bike Master Plan, WestCycle, 2017 • Two-year action plan for nature-based tourism in Western Australia, DBCA, 2019 and 2020

Dark sky / astro tourism

Summary	Opportunity for Perth Hills region	Literature review alignment
<p>Dark sky or astro-tourism is a small but growing trend centred on visitors seeking out dark skies to enable a clear and unpolluted view of the solar system.</p> <p>Western Australia is ideally placed to nurture this trend with its relative isolation and low population enabling uninterrupted viewing. Many small, regional towns are identifying this as a growth sector and working to protect the purity and clarity of the night sky.</p> <p>It is also a strong complementary offer to daytime activities such as soft adventure tourism and has the potential to strengthen local evening economies.</p>	<p>The opportunity has been identified in the CoK EDS and CoA TDS. The Perth Hills region enables great clarity for viewing within close proximity to other supporting amenities, with minimal specific supporting infrastructure required.</p> <p>In addition to growing initial awareness and product offer amongst local audiences there are strong extension opportunities through niche accommodation, walking tours and connections to Aboriginal cultural heritage.</p> <p>CoK highlights a range of supporting cultural attractions and opportunities including Camping with Custodians accommodation and an Aboriginal astronomy centre.</p>	<ul style="list-style-type: none"> • Economic Development Strategy (EDS), CoK, 2018 • Tourism Destination Strategy (TDS), CoA, 2019

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