

**DRAFT TOURISM DEVELOPMENT
PLAN FOR THE CITY OF
JOONDALUP**



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EXECUTIVE SUMMARY

The City of Joondalup Tourism Development Plan 2005-09 is an integral part of its strategic planning process and has been developed in the context of the City's Strategic Plan 2003-2008.

The Tourism Development Plan (TDP) is designed to deliver on the City's **Vision** —

A sustainable City and community that are recognised as innovative, unique and diverse

and **Mission** —

Plan, develop and enhance a range of community lifestyles to meet community expectations.

The TDP incorporates the City's values, which were the guiding principles used in workshops and consultation undertaken with community and commerce representatives in the City and the tourism industry. Particular relevance was placed on the City's guiding principles of a community focus, sustainability, best value and leadership through partnerships and networks.

The TDP's primary objective is to provide all stakeholders with an understanding of the opportunities and issues for tourism in the City, and a plan for its sustainable development and management.

The TDP is designed to guide strategies and actions to achieve optimum outcomes from tourism in the City's relevant key focus areas. These are:

- 1) **Community Well-being** – where tourism can be an integral part of strategies that:
 - further develop Joondalup as a Learning City
 - enhance and create new cultural events and support cultural facilities
 - provide additional leisure and recreational activities.
- 2) **Caring for the Environment** – where tourism planning can direct the type and impact of tourism that the City promotes in order to:
 - ensure environmental sustainability.
- 3) **City Development** – where tourism development is planned to be a major strategy to deliver economic development, support for City assets and local employment growth through:
 - an emphasis on eco and cultural tourism, and
 - sustainable tourism opportunities in other niche markets.
- 4) **Organisational Development** – where, by implementing the TDP and an accompanying tourism policy framework, the City will demonstrate leadership in interacting with its community, marketing the City, and engendering community pride and identity.

The TDP, while primarily being implemented and owned by the City of Joondalup, will guide other stakeholders in their planning and decision-making where they impact on the City's tourism.

Preparation of the TDP took into account community and industry consultation, research, situational analysis and competitive analysis. The process led to strategic decisions on the positioning of Joondalup in tourism markets and, subsequently, the marketing activities and infrastructure developments needed to drive the delivery of planned outcomes/benefits.

The marketing activities and the development of infrastructure are expressed in the creation of a **vision** and a **mission** for the City's tourism — statements that fit in with the City's overall *Strategic Plan*.

Vision — *The creation of a vibrant tourism industry that is environmentally responsible, socially sound and economically viable. The industry is responsive to the community and visitors (tourists) and built on partnerships and networks.*

Mission — *To ensure that the partnerships and networks are in place, the policies are in place and that planning for the development and marketing of tourism is focussed in order to facilitate its accelerated growth. Tourism is to deliver in the City focus areas of community well-being, the environment, City development and organisational development.*

The TDP has four major sections:

- Marketing
- Infrastructure Planning and Development
- Funding
- Implementation.

As a strategic plan, it is an evolving guide to the role and work of the City in its pursuit of sustainable benefits from tourism.

Those benefits include:

- more jobs for residents,
- increased profitability for a wide range of businesses and a resultant increase in business value,
- a greater awareness of the social and economic value of the City's natural assets, and
- greater social and economic contributions by tourists to community facilities.

Tourism Development Zones

At the heart of the TDP is the application of a planning concept that identifies four tourism development zones in the City. They are:

- **The Coastal Tourism Development Zone**, which stretches from Marmion in the City's south to Burns Beach in the north. It includes the coastal strip west of West Coast Drive (and its northern extensions) and the adjacent ocean.
- **The Wetlands Tourism Development Zone**, which hugs the City's eastern boundary from Hepburn Avenue to Burns Beach Road. It incorporates Lake Goollelal, Lake Joondalup, Neil Hawkins Park and Yellagonga Regional Park.
- **The City Centre Tourism Development Zone**, which focuses on the Central Business District's businesses, facilities and educational and medical institutions.
- **The Coastal Bush Tourism Development Zone**, which covers the open space areas east of Padbury and Craigie, as well as the Craigie Recreational Centre.

The zones are different from each other with different infrastructure and services needs and they appeal to different visitor groups. A zonal approach to developing the City's tourism industry allows for development and marketing and promotions that can focus on specifics rather than a holistic approach that would try to market Joondalup to all prospective markets.

The TDP's recommended marketing plan has been developed to focus on growth in all markets relevant to the tourism zones. This allows a focused input from community and business interests that are zone specific and highlights the competitive strengths and differences that the zones present within the context of the greater metropolitan Perth region.

Recommendations focus on the first three zones, with the fourth — the Coastal Bush Tourism Development Zone — being seen by the consultants as offering opportunities in the long term, rather than the short to medium term.

Marketing

Joondalup, as a destination, will aim at a range of target markets, sourcing visitors/tourists from overseas, interstate and intrastate.

The City's primary products and experiences are:

- passive recreation with an eco/environmental edge in the Wetlands Zone
- active recreation (swimming, diving, skiing, sailing, etc) and passive recreation with an eco/environmental edge in the Coastal Zone (walking, whale watching, etc)
- entertainment and socialising (visiting attractions, eating and drinking at restaurants and pubs, shopping, attending events, playing golf, etc) in the City Zone, Coastal Zone identified nodes and specific locations (Joondalup Golf Course, Whitford City Shopping Centre, etc).

These markets were identified during an analysis of Joondalup's current markets, the Perth Region's current markets and the Competitive Analysis.

It is recommended that the City promote its tourism using its existing symbol (logo), which represents:

The imagery of the built and natural environment.

It is recommended the City position itself as a destination within the Sunset Coast and Experience Perth regions by co-operative participation in selected, market-specific activities and promotional material. Its support will be through participation with, not the adoption or use of, other logos, e.g. Sunset Coast, Experience Perth, Brand WA.

It is recommended Joondalup create and adopt a positioning statement in consultation with the City's residents and business community, along the lines:

Joondalup — Home of Perth's Coastal Parks

The TDP's Marketing Action Plan makes numerous recommendations on how the City can grow its tourism market share by targeted promotion of its attractions in partnership with its businesses and the community.

The objectives are:

- Position the City in its tourist markets and community as *Joondalup — Home of Perth's Coastal Parks*.
- Position Joondalup as a tourist destination within the tourism industry by engaging with Perth tourism industry, tourist businesses and organisations.
- Increase day visitor numbers and yield from relevant markets (VFR – local, Perth region residents, metropolitan accommodated visitors, special interest groups) to the Coastal Zone.
- Increase day visitor numbers and yield from relevant markets (VFR local, Perth region residents, metropolitan accommodated visitors and special interest groups including seniors, bird watching, conservationists, education groups) to the Wetlands Zone (Yellagonga Regional Park and Lake Joondalup).
- Increase visitor spend (yield) by visitors who have travelled to Joondalup City.
- Increase visitor numbers to and yield from visitors/tourists to the Joondalup City Centre and the Learning Precinct.
- Increase visitor numbers to and yield from visitors/participants in selected Joondalup events run in the coastal park, Yellagonga Park and Lake Joondalup, and Joondalup City Centre.
- Increase visitor numbers to and yield from visitors/tourists to the Coastal Bush Zone, which includes Pinnaroo Memorial Park and Craigie Open Space.

These objectives are to be achieved by the implementation of a range of recommended strategies that include:

It is recommended that a significant coastal park be created in a marketing sense. This would incorporate Marmion Marine Park and the terrestrial reserves extending from Hillarys north to Burns Beach. The coastal park should have access/facilities nodes at existing beach sites — Marmion Beach, Sorrento Beach, Hillarys Beach, Whitfords Node, Pinnaroo Point, Whitfords Beach, Mullaloo Beach, Ocean Reef, Beaumaris Beach and Burns Beach.

There should be an emphasis on improved services and infrastructure at the recommended primary nodes — Hillarys Boat Harbour (already developed), Pinnaroo Point, Mullaloo Beach (Tom Stephens Park), Ocean Reef and Burns Beach. Improved services and infrastructure will appeal to locals and visitors alike.

Quality cafés, refreshment kiosks, picnic and toilet/change room facilities should be developed in primary coastal nodes. They can be developed in private/public partnership ventures that deliver benefits to community groups, such as surf clubs, rescue groups, conservation groups, and business.

Yellagonga Regional Park and Lake Joondalup are major natural assets for the City and the TDP identifies how they can be promoted to increase tourism numbers and yield. Apart from the Swan River, Lake Joondalup is the largest body of fresh water within 40km of Perth and it has a real natural beauty.

Infrastructure Planning and Development

The recommendations for ongoing infrastructure planning and development are focussed on increasing visitor numbers and yield, while enhancing the City's facilities for residents, ensuring sustainability and protecting the natural environment.

All recommended developments (excepting transport linkages) are confined to the tourism development zones and are designed to attract and increase yield from targeted tourists.

The matters covered include transport, parking, short-stay accommodation, visitor services (hospitality etc), signage, attractions and major projects (e.g. Ocean Reef, Cultural Centre, Hillarys Boat Harbour).

Recommendations for the Coastal Tourism Development Zone include:

- development of cafés and restaurant facilities at selected primary nodes/beaches
- development of quality change rooms/toilets at selected nodes/beaches
- development of limited short-stay accommodation at Hillarys and Ocean Reef harbours
- continued development of interpretive facilities, including an education facility at Ocean Reef or Hillarys (northern precinct) or Mullaloo Beach (Tom Stephens Park)

- tourist-oriented signage, including coastal drive thematic tourist signage
- containment of parking areas
- Ocean Reef Harbour development
- additional limited developments at Burns Beach.

Recommendations for the Wetlands Tourism Development Zone include:

- development of café and interpretive/education facilities at Neil Hawkins Park or its immediate vicinity
- continued development of dual use paths and interpretive materials
- continued assessment of Lot 1
- introduction of entry signage.

The City Centre Tourism Development Zone incorporates the City Centre, Neil Hawkins Park (which is also part of the Wetlands Tourism Development Zone) and the Learning Precinct. Combined, they have specific tourist/visitor appeal.

To develop the markets that have been identified, the major infrastructure requirements are short stay accommodation, cultural centre and conference facilities.

The City Centre Zone represents what is likely to be a longer term opportunity (5-10 years).

Implementation

The role of the City of Joondalup in the TDP is to:

- create the planning and development environment that will deliver quality recreational and tourist experiences, and
- participate in the communication and marketing of these visitor experiences to selected tourism markets and to its community.

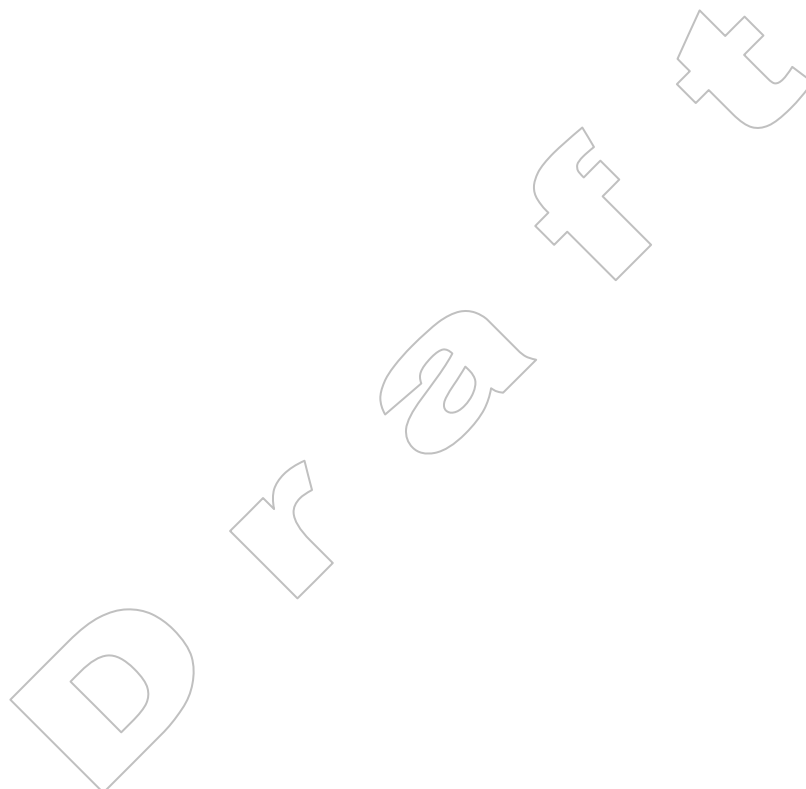
The TDP recognises the opportunity and advantages for cooperation between the City of Joondalup and nearby local government authorities in marketing activity and infrastructure development.

A number of strategies are recommended for a start-up phase and an ongoing phase to ensure implementation of the TDP is undertaken effectively and efficiently. They include the creation of a staff position — a Tourism Development Officer for at least two years to work with the City's business units to ensure there is a whole-of-City focus on implementing the TDP's strategies.

Funding

While implementation of the TDP involves mainly strategic and tactical changes to the City's established activities, some additional funding is required.

Specific annual operational expenditure of \$130,000 is recommended. This comprises \$50,000 to employ a Tourism Development Officer, \$70,000 for marketing support and \$10,000 for meetings and forums.



INTRODUCTION

The City of Joondalup Tourism Development Plan 2005-09 is an integral part of its strategic planning process and has been developed in the context of the City's Strategic Plan 2003-2008.

The Tourism Development Plan is designed to deliver on the **City's Vision** —

A sustainable City and community that are recognised as innovative, unique and diverse

and Mission —

Plan, develop and enhance a range of community lifestyles to meet community expectations.

The Tourism Development Plan (TDP) incorporates the values held by the City, which are:

- vibrancy
- innovation
- responsiveness
- respect
- trust
- safety.

These values were the guiding principles used in workshops and consultation undertaken with community and commerce representatives in the City and the tourism industry.

Particular relevance was placed on the City's guiding principles of:

- a community focus,
- sustainability,
- best value, and
- leadership through partnerships and networks.

The TDP's primary objective is to:

- Provide all stakeholders (the City of Joondalup, its industry and community, and the tourism industry) with:
 - an understanding of the opportunities and issues for tourism in the City, and
 - a plan for its sustainable development and management.

The TDP is designed to guide strategies and actions to achieve optimum outcomes from tourism in the City's relevant key focus areas, which include:

- 5) **Community Well-being** – where tourism can be an integral part of strategies that:
 - further develop Joondalup as a Learning City
 - enhance and create new cultural events and support cultural facilities
 - provide additional leisure and recreational activities.
- 6) **Caring for the Environment** – where tourism planning can direct the type and impact of tourism that the City promotes in order to:
 - ensure environmental sustainability.
- 7) **City Development** – where tourism development is planned to be a major strategy to deliver economic development, support for City assets and local employment growth through:
 - an emphasis on eco and cultural tourism, and
 - sustainable tourism opportunities in other niche markets.
- 8) **Organisational Development** – where, by implementing the TDP and an accompanying tourism policy framework, the City will demonstrate leadership in:
 - interacting with its community
 - marketing the City, and
 - engendering community pride and identity.

All of the City's Business Units have a part to play in creating, implementing and monitoring the development of tourism in a way that will deliver on the City's strategic outcomes and objectives.

The TDP, while primarily being implemented and owned by the City of Joondalup, will guide other stakeholders in their planning and decision-making where they impact on the City's tourism.

This includes:

- Government agencies, including Tourism Western Australia (formerly known as Western Australian Tourism Commission – WATC), Department of Planning and Infrastructure, Department of Conservation and Land Management,

- Adjacent local authorities — City of Wanneroo, City of Stirling,
- Tourism industry organisations, including Sunset Coast Tourism Association, Experience Perth,
- Community organisations representing environmental, heritage, indigenous and cultural interests,
- Tourism businesses, including private sector, education sector.

The TDP will be supported by a City of Joondalup Tourism Policy document that will provide guidelines for decision-making in areas that impact on tourism.

Fundamentals must be understood when preparing and implementing a TDP. These are briefly discussed below and in more detail in the appendices. They fall under the following headings:

- The Definition of Tourism, its Value and Impacts (Appendix 1)
- The Planning Process for the Tourism Development Plan (Appendix 2)
- Community and Tourism Industry Input (Appendix 3)
- Existing Markets and Marketing (Appendix 4)
- Situational Analysis (Appendix 5)
- Competitive Analysis (Appendix 6)
- Tourism Development Zones.

Note: The Western Australian Tourism Commission (WATC) changed its name to Tourism Western Australia (TWA) while the TDP was being developed. To prevent confusion, all references to the organisation in this document use the new name.

The Definition of Tourism, its Value and Impacts (see Appendix 1 for more details)

The Definition of Tourism

Tourism's contribution to Western Australia's economy continues to grow and will further increase in significance over the years as a prime generator of economic and social benefits for the nation, particularly in regional communities.

Recent Tourism Western Australia (TWA) reports confirm tourism is one of WA's leading industries in 2003, accounting for 3.5 per cent of the state's economic activity (gross state product) and providing jobs for somewhere between 72,000 and 80,000 people. This represents about 8 per cent of total employment in the state.

Growth for the next ten years is forecast by TWA at 4.6 per cent per annum.

Statistics raise the question: How do you define what is a tourist? In Australia, a tourist is broadly defined as either ...

- A person who undertakes travel, for any reason, involving a stay away from his or her usual place of residence for at least one night; or
- A person who undertakes a pleasure trip involving a stay away from home for at least four hours during daylight, and involving a round distance of at least 50 km; however, for trips to national parks, state and forest reserves, museums, historical parks, animal parks, or other man-made attractions, the distance limitation does not apply.

The Value of Tourism

In 2002, more than 20 million trips were taken around Western Australia. Of these, 7.4 million trips¹ (including intrastate) involved at least an overnight stay, 12.9 million day trips² and \$4.6 billion³ estimated total expenditure (including day visitors).

Clearly, tourism is, and will continue to be, a key factor in WA's economic prosperity.

Tourism Industry Impacts

Developed and managed in a sustainable way, tourism can deliver a number of valuable benefits to a community — socially, environmentally and economically.

These benefits for Joondalup City can include:

- Strengthening of social and cultural lifestyles through incremental visitor support and expenditure at events, cultural venues and the like, with funds flowing to involved community groups across heritage, arts and sporting activities.
- Enhancement of the economic value of natural environments, which may be under pressure from developers for residential, light industrial and retail use. The attraction of tourists to these natural environments generates real moral and economic support to enhance and manage these assets.
- Economically, tourism (visitors) directly contribute, through expenditure, to:
 - business revenues and business values (thus local authority rates),
 - employment, and
 - support of public services, such as transport, cultural activities and facilities.

¹ Source: Bureau of Tourism Research (National Visitor Survey)

² International Visitor Survey

³ Regional Expenditure Methodology

The Planning Process for the Tourism Development Plan (see Appendix 2)

Creation of a TDP requires a holistic understanding of the industry, which like many sectors in the economy, involves private industry, community, not-for-profit bodies and local, state and federal governments. It is an export and local industry, with supply and demand components.

In producing this document, the consultants were directed by a Brief prepared by the City of Joondalup and an agreed process that has seen:

- a review of existing relevant tourism research,
- consultation and workshopping with industry, government and community,
- consideration of existing City planning,
- preparation of a draft TDP for review by appropriate industry, government and community, and
- consultation and review with City management.

Very significantly, the process of developing the TDP, as a priority, took into account the wishes of the City's **community (residents) and businesses** as to the type of tourism they want and the outcomes they want to achieve from tourism.

Community and Tourism Industry Input (see Appendix 3)

As part of the consultation process, two workshops were held with community groups and representatives of the tourism industry and written submissions were invited.

The ideas, visions and criticisms that were presented by workshop attendees are integral to the recommendations in this document.

Existing Markets and Marketing (see Appendix 4)

Joondalup is part of the WA tourism region described as *Experience Perth*. The region incorporates 45 local government areas, including those tourism areas variously described as Perth, Fremantle, Peel (Mandurah), Rockingham, Fun Coast, Sunset Coast, Swan Valley, Avon Valley, Perth Hills (Darling Range) and Heritage Country.

The region accounts for 54 per cent of WA's total overnight visitor numbers. Joondalup has less than 1 per cent of the region's market. Sixty-six per cent of the region's visitors are intrastate, 20 per cent interstate and 14 per cent international.

Visitor trends are critical considerations in developing Joondalup's TDP.

Currently, Joondalup's visitors are drawn from the following groups:

Intrastate

Day visitors from metropolitan Perth, primarily to participate in:

- water-based activities
- eating out at restaurants/cafés, visiting pubs and enjoying the nightlife
- shopping
- visiting friends and relatives (VFR).

International and Interstate

- VFR and staying privately
- day visitors enjoying:
 - water-based activities
 - restaurants, cafés, pubs and nightlife (Hillarys Boat Harbour is prominent)
 - shopping.

A vital influence on Joondalup's tourist industry is its seasonality, because a big proportion of visitors come because of water-based activities and the City's coastal attractions. Therefore, weather has an effect on visitor numbers and their distribution (peaks and troughs).

WA has positioned and branded itself as the world's "*natural choice – touched by nature*". TWA has chosen to promote the state's unique nature-based tourism experiences to identified target segments. The focus is on sustainability and partnerships with industry and local government.

As such, the TWA strategy presents Joondalup with a number of opportunities to contribute to the state's effort and grow its tourism.

WA's tourism industry is a major economic and social contributor to the state and is forecast to grow at an annual average of 4.6 per cent. The opportunity exists for Joondalup, in the context of its market potential, to achieve:

- more jobs for its residents
- increased profitability for a wide range of businesses, and a resultant increase in business value
- a greater awareness of the social and economic value of the City's natural assets
- greater social and economic contributions by tourists to community facilities.

The challenge for the City of Joondalup is not only to attract more visitors, but to develop infrastructure and services that will increase visitor expenditure for the City's tourism operators and other businesses.

Because it has under-utilised and under-developed attractions, Joondalup should be able to grow its tourism industry faster than the State or Perth region average growth rates.

Situational Analysis (see Appendix 5)

Existing Tourism Infrastructure

While a superficial look at the City of Joondalup region suggests that it does not have a tourism industry or significant tourism infrastructure, a closer look shows there are a number of businesses that are aware of their tourism markets and have positioned themselves to develop tourism.

While much of the City's tourism infrastructure primarily serves residents, it does have tourism relevance.

Joondalup is well served by transport connections, the result of its planning as a satellite city.

Roads and parking are critical to tourism, with more than 90 per cent of visitors being self-drive⁴.

Joondalup does not have a significant pool of short-stay beds to drive tourism. Most noticeable in Joondalup is the absence of short-stay accommodation in the form of a hotel/motel or apartment complexes in the City Centre.

While opportunities exist and demand is strong, the TDP recommends environmentally sensitive accommodation developments restricted to Hillarys, Ocean Reef and the City Centre.

Joondalup's current built attractions for tourists include (see map next page and Appendix 7):

- Hillarys Boat Harbour, including The Aquarium of Western Australia (AQWA), the Rottnest Ferry Terminal, food and liquor, retail (gift, recreational), a safe beach, boating facilities, short-stay apartments, The Great Escape.
- Joondalup Resort and Golf Course
- Arena Joondalup
- Beach facilities at Burns Beach, Ocean Reef, Mullaloo, Pinnaroo Point, Whitfords, Hillarys and Sorrento
- Learning City Precinct
- Whitford City, Warwick and Lakeside Joondalup shopping centres.

Joondalup has a significant group of natural attractions/activities, some of which currently attract tourists and others that offer potential for a range of specific markets. They include:

- the beaches, ocean (Marmion Marine Park) and coastal reserve,
- Yellagonga Regional Park,
- Pinnaroo Valley Memorial Park/Craigie Open Space/Warrandyte Reserve,

⁴ TWA Research, July 2004



- water skiing area (Whitford Beach),
- whale watching,
- diving and snorkelling, and
- offshore fishing.

Only the marine environment and beaches attract a significant number of visitors. In 2002-03, CALM reported 1,442,670 visits to the Marmion Marine Park.

The coastal area will continue to be the primary opportunity to develop tourism, but there are also opportunities to develop tourism in the Yellagonga Regional Park and the City Centre in the short term.

Retail and hospitality infrastructure and its mix is a critical factor in attracting tourists and in generating economic benefit. Joondalup currently has some significant, but limited, facilities in this regard.

For example, Hillarys Boat Harbour is a significant retail and hospitality precinct in the context of Perth's tourist facilities and a major strength for Joondalup.

In the eyes of tourism industry representatives, the City of Joondalup is not seen as a tourism destination. Therefore, brand awareness must be created.

The City has played a role in the marketing of tourism. Activities have included:

- funding support of Sunset Coast Tourism Association
- creation of a tourism web presence
- purchase of advertising space in the Sunset Coast Visitor Guide
- staging and promotion of the Joondalup Festival, Perth Criterium Series and other events
- tourism in City promotional brochures.

While a few private businesses have strategically promoted themselves to tourism markets, Joondalup, as a region, has not positioned and promoted itself to tourism markets in any cohesive way.

Competitive Analysis (see Appendix 6)

As part of the process, the consultants prepared a list of Joondalup's competitive strengths and weaknesses. These were used to understand how the City's tourism industry can be promoted in today's highly-competitive commercial environment.

Tourism Development Zones

At the heart of the City of Joondalup's tourism development plan is the application of a planning concept defined as:

Tourism Development Zones (TDZ) – a TDZ represents “a coherent area of potential for tourism destination development and marketing based upon significant tourism factors, past, present and future.”⁵

These factors include attractions, services and facilities.

The tourism development zone provides a flexible tool for large or small, regional or sub-regional tourism product development and marketing. It allows thematic approaches and assists in addressing access and transport issues.

At the macro level in WA, the State Government, through Tourism Western Australia, has re-organised the state into five tourism development zones — Australia's North West, Australia's South West, Experience Perth, Australia's Coral Coast and Australia's Golden Outback.

The City of Joondalup Tourism Development Plan identifies four specific tourism development zones in the City (see map on next page and Appendix 8).

They are:

- **The Coastal Tourism Development Zone**, which stretches from Marmion in the City's south to Burns Beach in the north. It includes the coastal strip west of West Coast Drive (and its northern extensions) and the adjacent ocean.
- **The Wetlands Tourism Development Zone**, which hugs the City's eastern boundary from Hepburn Avenue to Burns Beach Road. It incorporates Lake Goollelal, Lake Joondalup, Neil Hawkins Park and Yellagonga Regional Park.
- **The City Centre Tourism Development Zone**, which focuses on the Central Business District's businesses, facilities and educational and medical institutions.
- **The Coastal Bush Tourism Development Zone**, which covers the open space areas east of Padbury and Craigie, as well as the Craigie Recreational Centre.

The zones are different from each other with different infrastructure and services needs and they appeal to different visitor groups. A zonal approach to developing the City's tourism industry allows for development and marketing and promotions that can focus on specifics rather than a holistic approach that would try to market Joondalup to all prospective markets.

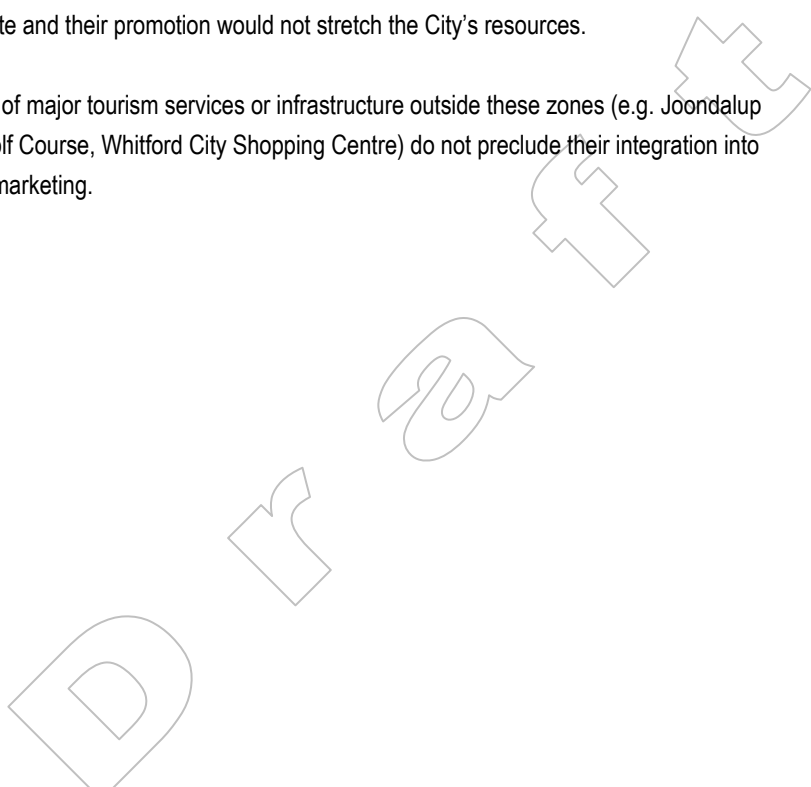
⁵ Source: Stephen F Witt and Luis Mountinho



Specific marketing strategies can be prepared and implemented for each zone, focusing on attractions and facilities in each zone, but still maintaining Joondalup as the overall promotional umbrella. This will also result in a faster economic return to the City's businesses, with a flow-on in employment opportunities.

Three of the zones offer immediate opportunities, with the fourth, the Coastal Bush Tourism Development Zone, being a longer-term objective. This is because the three zones are relatively easy to promote and their promotion would not stretch the City's resources.

The existence of major tourism services or infrastructure outside these zones (e.g. Joondalup Resort and Golf Course, Whitford City Shopping Centre) do not preclude their integration into planning and marketing.



THE TOURISM DEVELOPMENT PLAN

Preparation of the City of Joondalup Tourism Development Plan took into account community and industry consultation, research, situational analysis and competitive analysis. These are outlined briefly in the preceding introduction and in detail in the appendices. The process led to strategic decisions on the positioning of Joondalup in tourism markets and, subsequently, the marketing activities and infrastructure developments needed to drive the delivery of planned outcomes/benefits.

The marketing activities and the development of infrastructure are expressed in the creation of a **vision** and a **mission** for the City's tourism — statements that fit in with the City's overall *Strategic Plan*.

City of Joondalup Tourism Vision and Mission

Vision — The creation of a vibrant tourism industry that is environmentally responsible, socially sound and economically viable. The industry is responsive to the community and visitors (tourists) and built on partnerships and networks.

Mission — To ensure that the partnerships and networks are in place, the policies are in place and that planning for the development and marketing of tourism is focussed in order to facilitate its accelerated growth. Tourism is to deliver in the City focus areas of:

- community well-being
- the environment
- City development
- organisational development.

Core Values and Guiding Principles

The City's Values and Guiding Principles, as outlined in its *Strategic Plan*, are adhered to. Those of greatest relevance are:

- sustainability
- leadership through partnerships and networks
- flexibility.

The TDP has four major sections:

- Marketing
- Infrastructure Planning and Development
- Funding
- Implementation.

As a strategic plan, it is an evolving guide to the role and work of the City in its pursuit of sustainable benefits from tourism.

Tourism Development Zones versus Whole-of-City Focus

At the heart of the City of Joondalup's tourism development plan is the application of a planning concept defined as:

Tourism Development Zones (TDZ) – a TDZ represents “a coherent area of potential for tourism destination development and marketing based upon significant tourism factors, past, present and future.”⁶

These factors include attractions, services and facilities.

The tourism development zone provides a flexible tool for large or small, regional or sub-regional tourism product development and marketing. It allows thematic approaches and assists in addressing access and transport issues.

At the macro level in WA, the State Government, through Tourism Western Australia, has re-organised the state into five tourism development zones — Australia's North West, Australia's South West, Experience Perth, Australia's Coral Coast and Australia's Golden Outback.

The City of Joondalup Tourism Development Plan identifies four specific zones in the City (see Appendix 8).

They are:

- **The Coastal Tourism Development Zone**, which stretches from Marmion in the City's south to Burns Beach in the north. It includes the coastal strip west of West Coast Drive (and its northern extensions) and the adjacent ocean.
- **The Wetlands Tourism Development Zone**, which hugs the City's eastern boundary from Hepburn Avenue to Burns Beach Road. It incorporates Lake Goollelal, Lake Joondalup, Neil Hawkins Park and Yellagonga Regional Park.

⁶ Source: Stephen F Witt and Luis Mountinho

- **The City Centre Tourism Development Zone**, which focuses on the Central Business District's businesses, facilities and educational and medical institutions.
- **The Coastal Bush Tourism Development Zone**, which covers the open space areas east of Padbury and Craigie, as well as the Craigie Recreational Centre.

The zones are different from each other with different infrastructure and services needs and they appeal to different visitor groups. A zonal approach to developing the City's tourism industry allows for development and marketing and promotions that can focus on specifics rather than a holistic approach that would try to market Joondalup to all prospective markets.

Specific marketing strategies can be prepared and implemented for each zone, focusing on attractions and facilities in each zone, but still maintaining Joondalup as the overall promotional umbrella. This will also result in a faster economic return to the City's businesses, with a flow-on in employment opportunities.

Three of the zones offer immediate opportunities, with the fourth, the Coastal Bush Tourism Development Zone, being a longer-term objective. This is because the three zones are relatively easy to promote and their promotion would not stretch the City's resources.

The existence of major tourism services or infrastructure outside these zones (e.g. Joondalup Resort and Golf Course, Whitford City Shopping Centre) do not preclude their integration into planning and marketing.

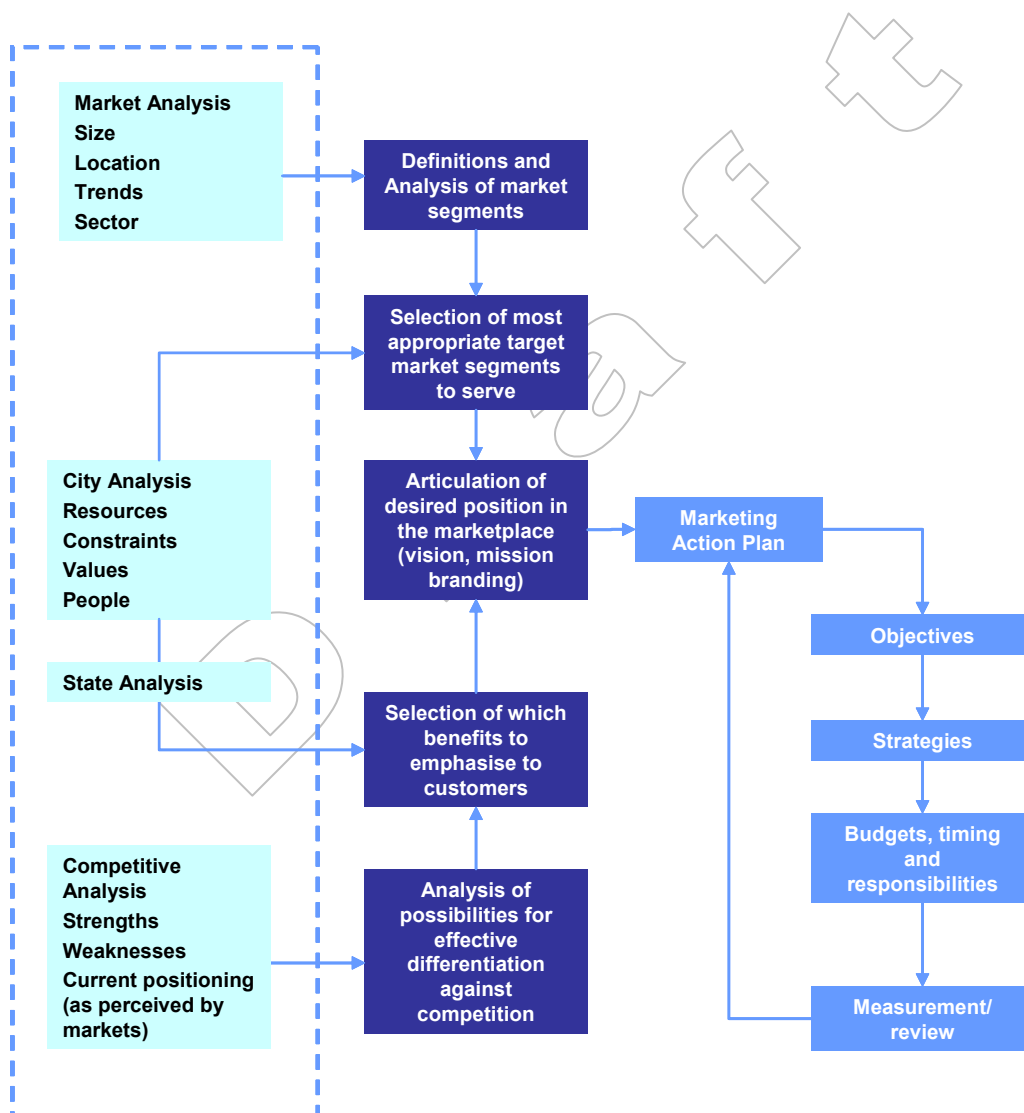
The recommended marketing plan (which follows) has been developed to focus on growth in all markets relevant to the tourism zones.

This allows a focused input from community and business interests that are zone specific and highlights the competitive strengths and differences that the zones present within the context of the greater metropolitan Perth region.

Marketing

Overview

The recommended positioning and branding of Joondalup as a tourism destination and its marketing action plan are arrived at by following a process that is demonstrated in the following schematic:



Definitions and Analysis of Primary Market Segments

Joondalup, as a destination, will aim at a range of target markets, sourcing visitors/tourists from overseas, interstate and intrastate.

Its primary products and experiences are:

- passive recreation with an eco/environmental edge in the Wetlands Zone
- active recreation (swimming, diving, skiing, sailing, etc) and passive recreation with an eco/environmental edge in the Coastal Zone (walking, whale watching, etc)
- entertainment and socialising (visiting attractions, eating and drinking at restaurants and pubs, shopping, attending events, playing golf, etc) in the City Zone, Coastal Zone identified nodes and specific locations (Joondalup Golf Course, etc).

These markets were identified during an analysis of Joondalup's current markets, the Perth Region's current markets and the Competitive Analysis.

Selection of Most Appropriate Target Market Segments

Joondalup will focus on international, interstate and intrastate visitors in the following market segments and timeframes:

Immediate Timeframe

- Visiting Friends and Relatives. This is a strong motive/activity for all source markets because Joondalup has a big migrant population and attractions/activities that appeal to family socialising.
- Nature-based/eco-tourism. Visitors/tourists who will be attracted to the natural environments and learning opportunities in the Coastal Zone and the Wetland Zone.
- Backpackers and soft adventure tourists who will be attracted primarily to the active recreational experiences, principally in the Coastal Zone.
- Seniors (Perth metropolitan) who will be attracted primarily to the shopping and Coastal Zone experiences.
- Education tourists attracted to visit students, attend graduation ceremonies and other events associated with the City Learning Precinct.

Future Timeframe

- Business tourists attending meetings or conferences in the City Centre. They will be attracted by the Learning Precinct and Health complex (hospital) and Joondalup Resort.
- Event tourists attracted to community cultural/entertainment and sporting events.

Joondalup will remain focused on **day visitors** as the primary tourist market and while they will use private transport, an opportunity exists to move many to public transport.

Niche markets will be important and will contribute to the maintenance of assets, particularly the City's natural assets. They include:

- whale watching
- underwater diving
- water skiing
- fishing
- education in natural sciences
- golf
- Aboriginal culture and heritage
- event participants and spectators.

Analysis of Possibilities for Effective Differentiation Against Competition

The analysis of Joondalup's competitive strengths and weaknesses (see Appendix 6) suggests that Joondalup is primarily in competition with the rest of the Perth Region and its strongest possibility for differentiation lies with:

- its Coastal Zone and the relationship of the Marmion Marine Park to the adjacent coastal environment, which, in contrast to the rest of the Perth metropolitan beach environment, is natural and park-like.
- the marine environment — its beaches, which offer a different range of experiences to the other metropolitan beach cultures, such as Scarborough Beach, Cottesloe Beach and City Beach.
- Neil Hawkins Park and the amenities of Yellagonga Regional Park, which adjoin City Centre Zone amenities.
- Joondalup City Centre, which has the potential to develop as a hospitality precinct similar to Mt Lawley (Beaufort and Walcott streets), Leederville (Oxford and Newcastle streets), Cottesloe (Napoleon Street) and Claremont (Bay View Terrace and St Quentin Avenue). While it is unlikely to ever compete with Northbridge or Fremantle, it has potential to complement Hillarys Boat Harbour as an entertainment precinct for the northern suburbs.
- the Coastal Bush Zone, which is a natural tourism development zone encompassing Pinnaroo Memorial Park and Craigie Open Space, could play a role in the long-term (more than three years).
- Joondalup City Centre and the Learning Precinct potentially offering a point of differentiation as a business tourism destination hosting conferences and meetings on education, health and technology. A lack of short stay accommodation (motels, hotels, apartment hotels) and a suitable conference facility makes this a future opportunity. However, this segment is highly competitive. There is no shortage of conferencing facilities in Perth for events up to 500 people.

The creation of a conference facility may more appropriately rest with the Learning Precincts' educational institutions.

The issue is highlighted by the following press item (August 2004).

Gene team

Edith Cowan University's centre for human genetics is hosting an international conference on genetic diseases to start on Sunday. It is at the Esplanade Hotel, Fremantle

Selection of Benefits to Emphasise to Customers

To capture a bigger share of the day visitor market from all market sources (international and interstate visitors to Perth and intrastate, primarily Perth, residents), it is recommended that the City emphasise:

- the environmental and recreational strengths of its nature-based tourism development zones
- the entertainment and cultural strengths of the City Centre, linked to Neil Hawkins Park and civic buildings, events, public art and open space, and
- the entertainment and recreational strengths of the coastal nodes, including the key areas of Hillarys and Ocean Reef (when developed).

This strategy will complement WA's tourism positioning as "the real thing", which focuses on natural attractions and lifestyle.

The City Centre, with its strength in contemporary art, culture and education, also can be part of the state's Cultural Tourism Strategy, particularly when the proposed cultural centre is built.

Supported by appropriate visitor/tourist services and facilities, these markets can:

- bring incremental revenue to the region,
- contribute to the maintenance, management and enhancement of the City's assets, and
- increase the economic value of the City's natural environment to the community, business and government.

Consumer and Trade Marketing Strategies

Marketing strategies recommended in the TDP target consumers and the trade (wholesale and retail), using state, national and international tourism distribution and marketing networks.

Branding and Positioning

The City's tourism vision and mission are stated on page 15 above. Branding and positioning take those statements into account.

It is recommended that the City promote its tourism using its existing symbol (logo), which represents:

The imagery of the built and natural environment.

The reason for recommending not to have a tourism-oriented logo for tourism marketing activities is that the tourism sector is already cluttered with symbols (logos and slogans). For Joondalup, they include:

- Brand WA (originally **touched by nature** and now *the real thing*)
- the Sunset Coast brand
- the Experience Perth brand, and
- individual businesses and educational/business groups.

In addition to these logos in the international market is the Australian Tourism Commission's logo. There are also logos for airlines, accommodation, hospitality outlets and the tourism industry's accreditation system.

It is recommended the City position itself as a destination within the Sunset Coast and Experience Perth regions by co-operative participation in selected, market-specific activities and promotional material. Its support will be through participation with, not the adoption or use of, other logos, e.g. Sunset Coast, Experience Perth, Brand WA.

Joondalup will grow its tourism market share by targeted promotion of its chosen attractions and features in partnership with its businesses and community.

Recommended Strategy

Joondalup create and adopt a positioning statement in consultation with the City's residents and business community, along the lines:

Joondalup — Home of Perth's Coastal Parks

or

Joondalup — Centre of Perth's Coastal Parks

In this context, coastal parks refer to the ocean, wetlands and bush environments.

City management may wish to consider other slogans or positioning statements, perhaps through consultation with City residents and businesses.

It may be appropriate to run a competition to select the best slogan. This would be an appropriate way of involving the community in the TDP.

Marketing Action Plan

Objective 1 (immediate and long term — three years-plus)

Position the City in its tourist markets and community as *Joondalup — Home of Perth's Coastal Parks*.

Note: this positioning has credibility and competitive advantage. It does not preclude promotion of leisure/entertainment components such as Hillarys, the City Centre, Joondalup Resort and shopping centres.

Recommended Strategies

- 1) The identification and marketing of the natural tourism development zones as natural destinations and attractions.
- 2) Creation of a high-quality image library of the City's natural and built attractions.
- 3) Co-ordinated strategy between City business units to ensure the images appear in all relevant City communications (not only tourism), for example annual reports, brochures and maps.
- 4) Generate publicity opportunities for general news media and tourism media.
- 5) Advertorial in the Sunset Coast tourist brochure and the Experience Perth tourist brochure (full page) with a focus on three zones (Coastal, Wetlands and City Centre) and events.

Have the coastal park (refer Objective 3, Strategy 1 on page 25), identified as a park in the maps of both above brochures.

- 6) Develop a City tourism presentation that can be used by the City, Sunset Coast Tourism, Experience Perth and Tourism WA in trade and consumer presentations. This should be subsidised by industry.
- 7) Pursue Eco Certification from Eco Tourism Australia for the coastal dual-use path, other attractions and tours operated in the coastal park, such as the proposed Fisheries Research and Community Education Centre, whale watching tours and dive operators. (Refer Appendix 10)

Also pursue Eco Certification for interpretive experiences in Yellagonga Regional Park, including any future interpretive centre and operators who may be admitted.

This accreditation is consistent with CALM operator licensing requirements and will both promote and safeguard the environment.

- 8) Develop a trade and consumer colour brochure promoting the City's primary destinations, its coastal park, Yellagonga Regional Park and Lake Joondalup (as opposed to promoting Joondalup City, the local government area, as the destination).

Production and distribution of this brochure is initially recommended for two years. It should be subsidised by limited co-operative (sponsorship) advertising from the City's businesses. It should be double-sided, single-fold A3-size; 100,000 per annum for tourism and, in year one, one for each household in Joondalup.

The brochure should identify with Experience Perth and include reference to, but not prominence of, the City Centre. The slogan, *Joondalup – Home of Perth's Coastal Parks*, should be prominent.

Budget Estimate

\$40,000 per annum (years one and two).

Objective 2 (immediate and short-term - 1-3 years)

Position Joondalup as a tourist destination within the tourism industry by engaging with Perth tourism industry, tourist businesses and organisations.

Recommended Strategies

- 1) Engage a Tourism Development Officer (see page 50- Implementation).
- 2) The officer to establish communication with appropriate organisations including:
 - *Joondalup Business Association
 - *Sunset Coast Tourism
 - *Experience Perth (regional tourism)
 - *FACET (Forum Advocating Cultural and Eco Tourism Inc)
 - Tourism Council WA
 - Tourism Western Australia
 - CALM – Department of Conservation and Land Management (Visitor Services)
 - *Ecotourism Australia
 - *WAITOC (Western Australian Indigenous Tourism Operators Committee Inc.)

City membership of those marked * is recommended. The communication is intended to raise the profile of the City and its potential and to ensure the City is abreast of developments and opportunities.

- 3) Participate in partnership with Sunset Coast Tourism in Perth-based trade shows for two years.
- 4) Operate an annual familiarisation and briefing on Joondalup tourism opportunities in conjunction with Joondalup Business Association, Sunset Coast Tourism and CALM. These events should be aimed at inbound tour wholesalers, travel media, Tourism Western Australia and representatives of the meetings/conference industry.

Budget Estimate

\$8,000.00 (excluding salary component)

Objective 3 (immediate and long-term)

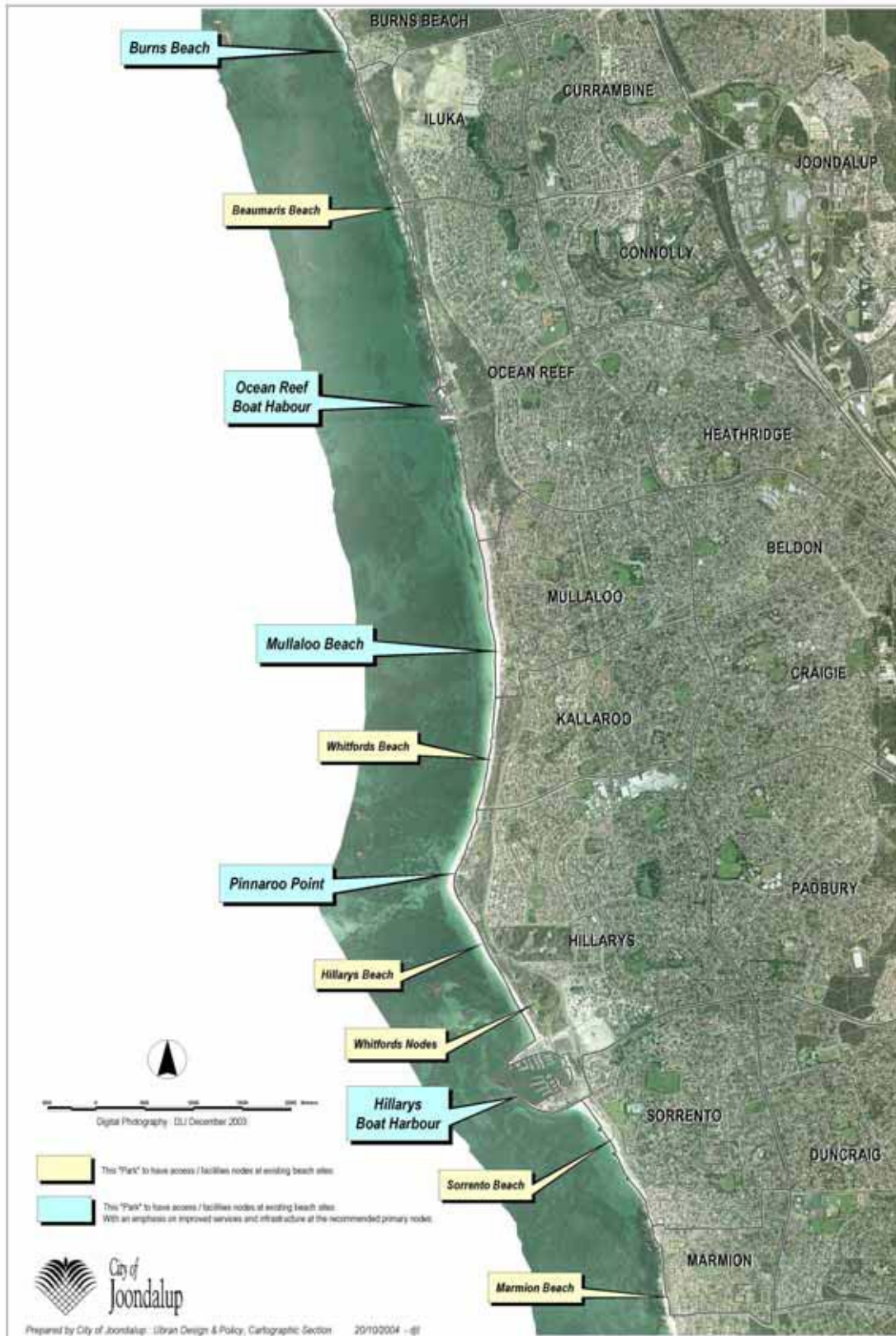
Increase day visitor numbers and yield from relevant markets (VFR – local, Perth region residents, metropolitan accommodated visitors, special interest groups) to the Coastal Zone.

Recommended Strategies

- 1) Create, in a marketing sense, a significant coastal park, incorporating Marmion Marine Park and the terrestrial reserves extending from Hillarys north, initially, to Ocean Reef and then Burns Beach.

The coastal park to have access/facilities nodes at existing beach sites (see map on next page and Appendix 9).

- Marmion Beach
- Sorrento Beach
- Hillarys Beach
- Whitfords Node
- Pinnaroo Point
- Whitfords Beach
- Mullaloo Beach
- Ocean Reef
- Beaumaris Beach
- Burns Beach.



There should be an emphasis on improved services and infrastructure at the recommended primary nodes (these are marked blue on the map):

- Hillarys Boat Harbour (already developed)
- Pinnaroo Point
- Mullaloo Beach (Tom Stephens Park)
- Ocean Reef
- Burns Beach.

Improved services and infrastructure will appeal to locals and visitors alike.

The coastal park is to become a recognised natural destination that incorporates all of the experiences and activities, services and facilities that day visitors demand.

- 2) The coastal park should be named in a major community promotional activity, with a final community vote from recommended names that will communicate its values to visitors/tourists. This is another way of involving the community in the TDP.

Examples are: Joondalup Ocean Park, Oceanside Park, Joondalup Coastal Park, Sunset Ocean Park.

The coastal park should be visually identified and named in all promotional marketing material that is supported by the City. (It is acknowledged that it will not be a park in the context of the National Parks Authority and will be subject to existing management planning regulations).

- 3) Quality cafés, refreshment kiosks, picnic and toilet/change room facilities should be developed in primary coastal nodes. They can be developed in private/public partnership ventures that deliver benefits to community groups, such as surf clubs, rescue groups, conservation groups, and business.
- 4) The dual use path, which runs along the entire coast in the City's boundaries, to continue to be developed and maintained to a high standard. There should be more aesthetically-appropriate viewing points and quality interpretation of marine and terrestrial features.

The path to be strongly promoted as a unique natural coastal experience/attraction (in the context of metropolitan Perth) in all marketing material.

- 5) The promotion of roads adjacent to the coastal park as a themed tourist drive with tourist-oriented signage identifying the park and its nodes (beaches and harbours).

The emphasis to be placed on the primary nodes as entry points and people encouraged to use the coastal dual use path.

Creation of the themed tourist drive to be co-ordinated with the cities of Stirling and Wanneroo. It should start/end at Scarborough and extend as a return drive to/from Mindarie Keys.

Roads involved:

- Marmion Avenue
- Anchorage Drive
- Burns Beach Road
- Ocean Reef Road
- Ocean Side Promenade
- Northshore Drive
- Whitfords Avenue
- West Coast Drive.

Note: The Swan Valley Tourist Drive (which is a themed drive) can be used as a model.

The drive to be named (e.g. Sunset Strip, Sunset Coast Drive) and identified in all promotional material. Reference should be made to TWA and the Australian standards.

- 6) Identification and promotion in publications, signage and media activity of the coastal park activities/experiences that are nature based and especially those that offer a competitive advantage. They are:

- AQWA
- underwater diving (including the existing trail at Hillarys)
- water skiing
- yachting and sail boarding
- whale watching (embarkation from Hillarys and Ocean Reef)
- Fisheries research and Community Education Centre.

- 7) Encouragement and support for coast care volunteer groups and other natural conservation groups to develop and run interpretive walks as both a visitor educational/tourism experience and a potential source of funds through the levying of a charge or collection of a donation.

- 8) The licensing of sustainable commercial ventures at the prime beach sites and on the path. Such ventures can create a point of difference and interest for each node.

For example, Mullaloo and Tom Simpson Park has a strong identify as a family picnic beach. Appropriate day-time additions could include coastal park branded inflatable play equipment.

The path can be host to coastal park branded electric refreshment carts or even pedal-powered tricycle carts and the like.

Guidelines need to be established and expressions of interest called for.

- 9) Develop the Perth Coastal Parks brochure as recommended in Objective 1.
- 10) This zone, the coastal park, has more picnic/BBQ spots than any other section of metropolitan beaches. This is a point of difference with appeal to the City's tourist markets and should be consistently highlighted/identified in maps and guides.

Budget Estimates

\$5,000 (only for additional marketing, excludes signage costs).

Objective 4 (immediate and long-term)

Increase day visitor numbers and yield from relevant markets (VFR local, Perth region residents, metropolitan accommodated visitors and special interest groups including seniors, bird watching, conservationists, education groups) to the Wetlands Zone (Yellagonga Regional Park and Lake Joondalup).

Recommended Strategies

- 1) Ensure that Yellagonga Regional Park and Lake Joondalup are clearly and fully depicted in all promotional material. Do not detract from the size or significance of the Park and the lake by showing only that portion which is in the City's boundaries. Local government boundaries are not relevant to visitors and some existing material detracts from attractions' significance.

Apart from the Swan River, Lake Joondalup is the largest body of fresh water within 40km of Perth and it has a real natural beauty.
- 2) For promotional purposes seek to delete the word regional from the park's name and always include reference to Lake Joondalup i.e. Yellagonga Park and Lake Joondalup. This will assist in differentiating it from other parks and position it more akin to major tourist parks like Kings Park and Whiteman Park.
- 3) In conjunction with the City of Wanneroo, seek to have CALM add Yellagonga Regional Park and Lake Joondalup in its portfolio of attractions it promotes to the tourist trade and consumers.

The park has the environments and experiences that are sought by a range of international markets and that are poorly served (for instance at Lake Monger).
- 4) Joondalup to promote in publications and through signage Neil Hawkins Park as the entry point to Yellagonga Park and Lake Joondalup (Wanneroo may promote Scenic Drive Park).

This is a critical strategy to draw people not only to the prime site in the park, but also to the Joondalup City Centre.

Maintain the policy of always identifying the park and lake and Neil Hawkins Park in promotional City Centre maps and other publications.

- 5) Continued encouragement and support for community conservation groups and the integration of their activities in tourist/visitor experiences where appropriate.
- 6) Develop the *Joondalup – Home of Perth Coastal Parks* brochure as recommended in Objective 1.
- 7) Promote the interaction between wildlife and visitors that is occurring at Neil Hawkins Park by including details in promotional material, on site signage and trade representations.

Develop a management strategy that ensures that the activity is ecologically sustainable in response to the proposal in the Yellagonga Regional Park management plan for the interaction to stop.

- 8) Call for expressions of interest from the private sector to develop the provision of visitor services/experiences, such as bicycle hire, at Neil Hawkins Park/Yellagonga.
- 9) Provide tourist directional signage:
 - In the City Centre pointing to Neil Hawkins Park and Yellagonga Park and Lake Joondalup, and
 - At other primary sites when developed (for example Lot 1 and Luisini Winery).

Budget Estimate

No additional costs

Objective 5 (immediate and long-term)

Increase visitor spend (yield) by visitors who have travelled to Joondalup City.

Recommended Strategies

- 1) Signage is an important factor in providing a quality visitor experience, improving road safety and helping people to arrive at the City's preferred destination points.

While Joondalup City has quality signage and there are standards established by government regulations for road signage, the recommendation is for signage that will assist in the branding and marketing of the tourism development zones.

For instance, the northern entry point (corner Hodges Drive and Ocean Reef Road) and southern entry point (Beach Road and West Coast Drive) to the coastal park should be signed and branded with the Joondalup City logo and the park name, with identification of the beach nodes, the coastal dual use path and other attractions such as Whitford City and Joondalup Resort.

The same treatment is recommended for the City Centre and Yellagonga Park and Lake Joondalup, with signage recommended for the Grand Boulevard and Joondalup Drive intersections and the entrance to Neil Hawkins Park.

Each major node/access point to the two parks should have branded identification of the City of Joondalup and the relevant park.

The City will need to develop details of a proposal and consult with appropriate government agencies.

The Swan Valley signage strategy is a good example of establishing a visitor focused, safe and friendly system. A similar system is being recommended for each of Joondalup's three main tourism development zones.

- 2) A Visitor (Information) Centre, previously known as a Tourist Bureau, remains an integral part of any strategy to increase the quality of visit and length of stay and, therefore, economic yield from visitors to a destination.

Tourism Western Australia (TWA) has a Tourism Network strategy⁷ to co-ordinate and assist WA's network of visitor centres and it provides limited financial assistance. However, the cost to operate these centres falls primarily on local government.

It is recommended that Joondalup does not operate its own Visitor Centre. Rather, in conjunction with Sunset Coast Tourism and Experience Perth, the City should use the Perth Visitor Centre (operated by TWA) as the information distribution/sales point.

Joondalup is an integral part of the greater Perth experience and the City's proximity to Perth and its small number of short stay beds mean that a Visitor Centre is hard to justify on economic grounds.

The Perth Visitor Centre, combined with a strong Internet presence, is appropriate for the immediate future, 3-5 years.

It is the responsibility of tourism businesses to cross promote and sell the City's attractions and, in turn, it is the responsibility of industry bodies to encourage and equip them to do so.

If the City's tourist operators decide to fund and open a Visitor Centre, it is recommended that consideration be given to locating it in the retail precinct of Hillarys Boat Harbour.

- 3) Support the promotion of quality accreditation to tourism industry businesses in conjunction with Tourism Council Western Australia (TCWA), Sunset Coast Tourism Inc. and Experience Perth Inc.

The quality of service delivered by tourism and hospitality businesses and other customer contact operations (e.g. public transport) impacts strongly not only on the performance of the businesses, but also visitors' perception of a destination.

⁷ Western Australian Tourism Network

The City should in its representations to industry encourage accreditation through the TCWA facilitated national accreditation system, which uses the following accreditation logo.



Where the City has any activity primarily focused on visitors/tourists, it will also have its operation accredited.

Budget Estimate

\$2,000

Objective 6 (future and long-term)

Increase visitor numbers to and yield from visitors/tourists to the Joondalup City Centre and the Learning Precinct.

A range of recommended strategies follow and they address the specific target markets of:

- education tourism
- business tourism (meetings, incentive, conferences and exhibitions)
- cultural tourism
- day visitors (eating out, entertainment).

Special Note: Marketing of this zone is not a short term priority (1-3 years) because the City Centre must first establish itself with local residents and the work force as an entertainment and cultural venue. As a business tourism destination, it requires new infrastructure such as a cultural centre, short stay rooms (hotel or apartments), a conference facility, commercial office accommodation (occupied) and a café/restaurant facility in Neil Hawkins Park.

Competition from Hillarys and, eventually, Ocean Reef will always be strong. However, if it has quality operators (food and beverage), it can aspire to be a hospitality precinct as have evolved in Leederville, Mt Lawley, Claremont and Cottesloe.

The City Centre's current strengths are its streetscapes, public art, parks and growing events schedule. **But it will not be a drawcard until the locals start using it significantly.**

Recommended Strategies

- 1) The City to encourage, through the Learning City Strategy group, the appointment of a part-time Business Development Officer focused on attracting business tourism and education tourism. The appointment is recommended to be made in the lead up to or following the opening of the TAFE Hospitality School and the proposed adjacent City Cultural Centre.

Discussion will be needed with regard to employer and accountability arrangements because benefits are expected to flow to Edith Cowan University (ECU), West Coast College of TAFE, Joondalup Health Campus, the City of Joondalup and City Centre businesses. The position to be jointly funded by these parties.

The role is market sector specific. The task is to attract meetings, exhibitions and increased attendances for learning focused activities hosted in the City.

- 2) Ensure incorporation of Neil Hawkins Park in the presentation/promotion of the City Centre (it is a major drawcard bringing people to the City) in tourism brochures and advertising.
- 3) Promote a specific City Centre events portfolio to the resident community and event target markets (refer Event Strategy, Objective 7 and strategies)
- 4) The City to continue to encourage, in concert with Joondalup Business Association, the co-operative marketing of the City Centre by property owners and tenants/operators. Existing initiatives include Friday night summer markets and Sunday serenades.
- 5) Continue promotion of the above activities through the existing strategies of local media coverage, local media advertising and distribution of promotional calendars to residents.
- 6) The City of Joondalup to become a member of the Perth Convention Bureau. ECU and West Coast College of TAFE should also be members in order to establish networks and market intelligence for the growth of the business tourism sector.

Budget Estimate

\$5,000

Objective 7 (immediate, future and long-term)

Increase visitor numbers to and yield from visitors/participants in selected Joondalup events run in the coastal park, Yellagonga Park and Lake Joondalup, and Joondalup City Centre.

Events that are owned and supported by the local residential and business communities and which are representative/reflective of the tourism strengths, are the most likely to succeed and be sustainable. A small portfolio of such events (up to six) should be chosen to promote to visitors/tourists at strategic times during the year.

Events can attract day visitors from all markets to Joondalup and drive additional expenditure in the region by those visitors. They also communicate the region's competitive strengths.

Recommended Strategies

- 1) Create a priority list of a recommended three events in the coastal park, two in the City Centre and one in Yellagonga Park and Lake Joondalup.

The coastal park events should be primarily active recreational events, in the City Centre they should be entertainment focused and in Yellagonga Park, the event should have an environmental focus.

Initial candidate events for development include:

- Joondalup Festival
- Perth International Arts Festival event e.g. films
- Night markets (summer) and the cycling criterium
- Community art exhibition
- Arena Joondalup's "Rock It"

Suggested concepts to be considered along with others include:

- a food event on the coast, building on and harnessing the excitement and media coverage of the opening of the abalone season.
 - an art and entertainment event that will build on the aesthetics of the City Centre, its public art, its parks and learning institutions. The success of Antony Gormley's sculptural installations at Lake Ballard in the Goldfields may be an inspirational starting point for concepts for Joondalup City Centre.
 - A wearable art festival based on the highly-successful Nelson Wearable Art Show in New Zealand and, more recently, the Broome Wearable Art Show. Not only do these events attract thousands of visitors year after year, they also involve the community in making costumes, floats and the like.
 - An Aboriginal cultural festival based on Yellagonga Park and organised with Wanneroo and CALM. The City's role to be facilitator and partner with Aboriginal people. Lake Joondalup has special heritage and spiritual values for Aboriginal people. The work done on NAIDOC celebrations can be a starting point for Joondalup.
- 2) Establish a connection with Eventscorp with regard to exploring major event opportunities that can be hosted in Joondalup.
 - 3) Continue promotion of events through existing strategies of local media coverage, local media advertising and the distribution of event calendars to residents.
 - 4) Pursue discussion with Sunset Coast Tourism and member local authorities on the concept of developing and promoting a regional calendar of events in its consumer promotional material. Ensure major events are incorporated in the Experience Perth regional calendar.

Budget Estimate

To be determined

Objective 8 (future and long-term)

Increase visitor numbers to and yield from visitors/tourists to the Coastal Bush Zone, which includes Pinnaroo Memorial Park and Craigie Open Space.

This is a future and long-term objective because the zone has less market appeal to tourists than the other three tourism development zones in the City. Its appeal will most likely stem from the creation of recreational/educational experiences run from a upgraded Craigie Recreational Centre.

Recommended Strategy

- 1) Establish in the management plan for Craigie Recreational Centre a role to develop recreational/educational experiences in the zone.
They should have an environmental/conservation focus with interpretive materials for the natural values.

Marketing – General Strategies

An Electronic/Internet Presence

Tourism marketing trends and consumer purchasing trends point to the increasing importance of an effective Internet presence in attracting tourists.

It is a marketing strategy that can deliver on all of the City's objectives and is a powerful way to present what is a very visual product — the tourism experience offer.

Opportunities for Joondalup to improve its profile on the Internet are considerable. For instance, a search of westernaustralia.com found only two restaurants under Joondalup and they are both, in fact, in Wanneroo (see Appendix 11).

The only entry for Hillarys Boat Harbour is Hillarys Harbour Resort (see Appendix 12). Yet, Hillarys Boat Harbour, with Sorrento Quay, AQWA, Rottne ferries and its other facilities, is Joondalup's main tourist attraction.

Other opportunities exist, for instance, in creative linking with the Department of Transport's coast cam at Hillarys Boat Harbour (see Appendix 13).

Recommended Strategies

The City's marketing and communication division to continue to develop their site and its links.

- 1) Negotiate linkages to Experience Perth and the Sunset Coast sites as they are developed.
- 2) The City to encourage its businesses to have a presence on westernaustralia.com, the state's e-market place and marketing site, which links into the national tourism database and connects to the visitor service network.
- 3) Link Joondalup City's tourism site into westernaustralia.com and/or the visitor services network to convert enquiries into bookings.

Research

Research is critical to the City in two contexts:

- 1) As a performance measurement in the context of growth in yield and visitor numbers.
- 2) As a marketing tool to test tourist/consumer responses to products and experiences, and to more effectively target preferred markets.

Relatively extensive research is available at what can be called a macro level, using the National Visitor Survey (NVS), the International Visitor Survey (IVS) and the ABS survey of tourist accommodation (where local government areas have a "competitive" volume of tourist beds). However, this industry data **is not all available** specifically for the City of Joondalup.

Perhaps even more important, there is a lack of data on day visitor expenditure in the City. While the NVS will reveal the level of visits (e.g. 365,500 domestic day visitors average per annum 2002-03), it cannot identify where (as opposed to on what) the money is spent.

The situation is improving and several regional tourism organisations have pioneered more localised research. Joondalup City has already supported Sunset Coast Tourism in its work with Edith Cowan University in collecting data. The EMRC is conducting co-operative research for their region and should be approached along with TWA to ascertain their experience.

Recommended Strategy

Meet with TWA's research management, Sunset Coast Tourism and the cities of Wanneroo and Stirling to map a common and appropriate way forward for producing research that will provide comparable data on:

- visitor numbers (by market source)
- visitor expenditure (by sector)
- visitor activity
- visitor satisfaction

at a local government level.

Budget Estimate

\$5,000 per annum in co-operation and with industry support.

Value Adding

There is a significant opportunity to increase the economic impact of tourism in the City as a result of co-operative and co-ordinated activity by business and the City's administration.

Tourism expenditure impacts in many sectors. For example, an event staged in the City Centre can impact on all retailers and their suppliers, not only cafés, pubs, delicatessens, entertainment venues, fuel and fast food outlets.

Opportunities to value-add to events and to the VRF tourism business need to be canvassed and considered by the business community. Too often, events come and go before businesses are aware of opportunities to be suppliers, or they are closed during the event itself.

The City and the Joondalup Business Association can assist in facilitating these discussions.

Recommended Strategy

The City to facilitate jointly with the Joondalup Business Association, an annual forum between business, the learning precinct, event organisers and the City to identify value-adding opportunities that can come from hosting events such as *Rock-it*, *Joondalup Festival*, Joondalup Falcons' football matches and other activities.

Aboriginal Participation in Joondalup Tourism

The City of Joondalup does not have a big indigenous population, but it has a well-documented indigenous history and heritage, with a number of important sites in the City's boundaries.

The 2001 ABS census recorded the City's indigenous population as 326 males and 301 females.

Aboriginal people have identified the Elders who can speak for the region and who are cultural guardians for the land and its history. However, apart from seven listed sites in Yellagonga Regional Park and a limited number of other specific sites, much remains to be done in identifying and protecting sites before they are opened to visitation. Of particular interest is the grave of Bennee Yowlee, a renowned spiritual man, in the vicinity of George Grey Place, Edgewater.

An important community education resource is available through Mooro Country Tours, an activity of the Northern Suburbs Reconciliation Group. However, the creation and promotion of interpretive tours, cultural performances and cross-cultural training as a commercial tourism product and/or education product is a decision to be made by Aboriginal people.

There is abundant research indicating strong consumer demand, especially from the European market. However, it is proving difficult to create viable tourist operations and a number of Aboriginal cultural experiences are on offer in other parts of metropolitan Perth.

Indigenous tourism has a representative industry association, the Western Australian Indigenous Tourism Operators Committee (WAITOC). TWA is currently developing an Aboriginal tourism marketing strategy.

Should appropriate Aboriginal people decide to operate tourism product/experiences in the City, then the Coastal and Wetlands Zones are excellent resources.

Recommended Strategy

The strategy to be adopted by the City is to continue to develop dialogue and understanding with Aboriginal Elders as a community building exercise, recognise Aboriginal heritage and create a relationship that can facilitate and assist any Aboriginal person or group wishing to develop tourism.

Establishing a relationship with the education sector (ECU and TAFE) and CALM will also facilitate education tourism associated with indigenous studies.

Development of Indigenous tourism will require the co-operation of the City and CALM and it is appropriate for the City to encourage its development.

Infrastructure Planning and Development

Overview

The recommendations for ongoing infrastructure planning and development are focussed on increasing visitor numbers and yield, while enhancing the City's facilities for residents, ensuring sustainability and protecting the natural environment.

All recommended developments (excepting transport linkages) are confined to the tourism development zones and are designed to attract and increase yield from targeted tourists.

The recommendations are intended to be compatible with the City's vision and consistent with the TDP's assessment of the City's competitive advantages and other north-west metropolitan developments.

The recommendations are not detailed nor prescriptive, but highlight where infrastructure can contribute to the growth of tourism.

The matters covered include:

- transport
- parking
- short-stay accommodation
- visitor services (hospitality etc)
- signage
- attractions
- major projects (e.g. Ocean Reef, Cultural Centre, Hillarys Boat Harbour).

Recommended strategies require City participation and can involve:

- approvals
- investment, and
- leases/licenses.

A further important role for the City involves actively planning for developments and attracting them.

Recommended Coastal Tourism Development Zone Initiatives

Overview

This is the primary tourism zone for the City. The zone will continue to see significant growth in visitor numbers with the development of the Ocean Reef Harbour precinct, the completion of the coastal alignment of Ocean Reef Road and the extension of Burns Beach Road to Burns Beach.

The opportunity is to add to visitor and local amenities, while providing a point of difference on the metropolitan Perth coastline.

Demand will come not only from the growing population in the metropolitan Perth north-west corridor, but also from the north-east corridor, which is closest to Joondalup beaches (accessed by Gnangara Road, Whitfords Avenue and Burns Beach Road, Joondalup Drive and Neaves Road).

The infrastructure recommendations call for the creation of quality facilities and services that will appeal to locals and tourists alike, and which will have a significant revenue contribution from tourists. They take into account research that shows there is demand from both residents and visitors for:

- eating out
- shopping
- going to the beach
- visiting parks
- active outdoor activities.

A summary of recommendations for the Coastal Zone:

- development of cafés and restaurant facilities at selected nodes/beaches
- development of quality change rooms/toilets at selected nodes/beaches
- development of a limited short-stay accommodation at Hillarys and Ocean Reef harbours
- continued development of dive experiences and facilities
- continued development of interpretive facilities, including an education facility at Ocean Reef or Hillarys (northern precinct) or Mullaloo Beach (Tom Stephens Park)
- tourist-oriented signage, including coastal drive thematic tourist signage
- containment of parking areas
- Ocean Reef Harbour development
- Burns Beach.

These are detailed below.

The recommended infrastructure is not to detract from the natural feel and visual impact of the coastal reserves, e.g. existing height restrictions to apply, parking minimised.

Recommended Strategies

- 1) Initiate planning approvals and permits and encourage the establishment of quality beachfront café facilities at Pinnaroo Point, Mullaloo Beach (Tom Stephens Park), Ocean Reef and Burns Beach. The preferred business model is a form of public and private partnership involving the City, with the business owned by the private sector on an appropriate lease. This approach can deliver benefits to essential community groups established at the sites, e.g. surf lifesaving, sea rescue and environmental/conservation groups.
- 2) Provide quality public change rooms/toilet facilities at all beaches, with an emphasis at those designated in Recommendation 1, above.
- 3) Continue to develop, in conjunction with CALM and the Department of Planning and Infrastructure, dive trails and other appropriate dive experiences in the Marmion Marine Park. Create safe pedestrian access to the existing Hillarys dive trail.
Establish a strategy for the Marmion Marine Park to be considered for a government-sponsored dive park. Currently, the investigative government committee is favouring Rockingham, and a site has been nominated. Joondalup could be considered after Rockingham because Hillarys and Ocean Reef provide excellent access points.
- 4) Plan for and attract developers and operators of short-stay accommodation facilities at Ocean Reef and request the state government to consider additional short stay accommodation at Hillarys Harbour. It is acknowledged that at the time of this report, a structure plan for Hillarys has been prepared and released for public input (*Hillarys Boat Harbour Structure Plan and Implementation Strategy*, May 2004).
Both sites are attractive to developers and operator/managers, although experience suggests that there will also be pressure for residential development because the financial returns to the developer are usually higher and more quickly achieved.
Apart from Joondalup's City Centre, these two sites represent the only opportunities for development of short-stay accommodation (excepting the Em Halliday Camp).
Facilities of between 50 and 100 rooms could be developed within the existing planning regulations. Demand may be five years away, but appropriately-designed facilities will grow tourism, create jobs and support other commercial activity at the sites.
At Hillarys, it would be possible to consider the area currently designated as "possible future boat pens" for an appropriate development.
- 5) Continue providing interpretive materials at the beach nodes and along the coastal dual use path, related to both the terrestrial and marine environments.
Creation of an education facility that will inform the public and support and encourage the volunteer (including schools) conservation/environmental effort in the zone. While Mullaloo Beach is central, the north precinct of Hillarys is the recommended site because of supporting

infrastructure, particularly parking.

State and federal grant monies have been available for such facilities.

- 6) Containment of parking in the beach nodes will be a major task because demand for spaces continues to grow. Both the local market and visitors/tourists will continue to rely on private and hire vehicles, particularly for short visits, i.e. two to four hours. Alternative parking capacity in the vicinity, e.g. Whitford City Shopping Centre and other recreation reserves with parking space, should be sign-posted. Longer-term, public transport services are essential to alleviate the pressure for more parking spaces.
- 7) Development of Ocean Reef Harbour to drive tourism growth and deliver community benefits is recommended to include:
 - short-stay accommodation (most likely self-contained)
 - dive operators, including equipment hire and sale, and training
 - restaurants/café/take-away foods
 - a tourist attraction*
 - quality public change rooms and toilets.

The majority of these recommendations offer high levels of ongoing employment and have market appeal.

It is further recommended that architecturally, it be significantly different to Hillarys Boat Harbour, but still have a signature design that exploits the elevated nature of much of the site, without impacting on its natural environment.

Height restrictions can be maintained and the site developed, for example, with a village feel.

*The development of a tourist attraction will require creative planning and can be water or land-based. For instance, the *Duyfken* replica ship would look quite stunning in the little harbour, whereas it is overwhelmed in Fremantle. It may need to be at Ocean Reef part time and there are issues with regard to conservation and maintenance. However, the Duyfken Foundation is looking for ways to ensure its sustainability.

Whale-watching may be another tourism growth opportunity for Ocean Reef Harbour.

It is recommended that as an integral part of the planning process, these issues and opportunities be considered. There will be pressure for residential development and recreational boating needs, which do not create the same levels of ongoing employment or attract visitors/tourists.

- 8) Burns Beach is a primary node in this plan. Planning for the area should ensure that any redevelopment takes into account that the visitor services (café) should not be cut off from the beach and ocean views by car parking — which is the case at present.

The beach will see increased demand with population growth (although limited due to the nature of the beach). The site would support more hospitality/food outlets, particularly as use of the coastal dual path grows.

Recommended Wetlands Tourism Development Zone Initiatives

Overview

This zone includes Yellagonga Regional Park and Lake Joondalup, which is an important tourism asset to both the City of Joondalup and the City of Wanneroo, as well as the north west metropolitan region.

A CALM management plan is in place for the park and the infrastructure recommendations that follow are in accord with its principals, although not all are specific recommendations of that plan.

Developments will require CALM, Wanneroo, Joondalup and community approvals, as well as normal approvals processes.

The recommendations are summarised under the following headings:

- development of café and interpretive/education facilities at Neil Hawkins Park or its immediate vicinity
- continued development of dual use paths and interpretive materials
- support for the development of the Luisini Winery project
- continued assessment of Lot 1
- introduction of entry signage
- development of Perry's Paddock.

Objective

The objective is to increase the market appeal of Yellagonga Regional Park and Neil Hawkins Park, grow tourism numbers and assist in increasing the yield from visitors/tourists in the City.

Recommended Strategies

- 1) Initiate planning approvals and permits and encourage the establishment of a café in or adjacent to Neil Hawkins Park. This will improve the appeal, generate yield and create employment. This site is preferred to Lot 1 because it will draw people to the City Centre more effectively and, in fact, ultimately increase the customer base for City Centre hospitality operations.

The café building can also incorporate an interpretive/education facility for the park — a facility that is best placed where the visitor numbers are highest.

The City Centre, which is close to the park, could handle overflow parking, so additional parking spaces should not be needed in the park.

It is recommended that any developing operator be offered a lease on the land, but the City should ensure the development does not impact on people's interaction with the park's wildlife.

- 2) Continue, in conjunction with CALM, the creation and maintenance of dual use paths beside Lake Joondalup. The City to consider contributing to this facility, which is in the conservation zone.
- 3) The City to seek appropriate outcomes from the Luisini Winery development proposals which are proposed to be funded by the National Trust and Department of Planning and Infrastructure. This heritage attraction would add to the appeal of the park and assist in raising its market profile. While the location is isolated from other commercial and tourist attractions, it offers potential employment opportunities and the promotional support that would come from the National Trust's management of the property.
- 4) Support for a feasibility study of Lot 1, which is potentially an important space for development. It is a very scenic site and large enough for commercial tourist ventures. If the café recommendation for Neil Hawkins Park is rejected, then Lot 1 is most likely a viable option. However, it is further from the City Centre and, therefore, the City Centre's parking facilities and businesses.
- 5) Entry signage to *Yellagonga Park and Lake Joondalup* is recommended at the entrance to Neil Hawkins Park.
- 6) Perry's Paddock, while a significant heritage and recreational site for the local community, is not a major tourist asset or attraction at present. However, the City should keep it in mind as a possible site for outdoor events even though it is isolated from other commercial activity.

Recommended City Centre Tourism Development Zone Initiatives

Overview

This zone incorporates the City Centre, Neil Hawkins Park (which is also part of the Wetlands Tourism Development Zone) and the Learning Precinct. Combined, they have specific tourist/visitor appeal.

To develop the markets that have been identified, the major infrastructure requirements are:

- Short stay accommodation
- Cultural centre
- Conference facilities.

The City Centre Zone represents what is likely to be a longer term opportunity (5-10 years). Mention is made of the need for increased commercial office space and its occupation because the City Centre (other than as an event venue) will really only come into its own as a tourist/visitor destination when it is strongly supported by locals, either residents, students or workers.

While it is an attractive precinct and pedestrian friendly, the nearby Lakeside Joondalup Shopping Centre makes it difficult for the City Centre to attract retail operators other than those involved in:

- hospitality and entertainment,
- after hours convenience, and
- commercial office services.

Equally, it does not have the traffic volume of Joondalup Drive, which has developed as a retail strip.

Development of the business tourism market faces some major obstacles which are expected to delay infrastructure investment. Consultation showed the obstacles to be:

- some excess capacity and downward pressure on room rates in the region,
- easy access to the region from Perth City, and
- strong competition in metropolitan Perth for the conference/meetings market up to 200 persons (made more difficult by the opening of the Perth Convention and Exhibition Centre.)

Objective

The development of infrastructure that will service the business tourism sector and support the trading of City Centre businesses.

Recommended Strategies

- 1) Identify potential short stay accommodation sites in the City Centre (including the Leaning Precinct) and put in place zoning approvals. Where it is council owned land, the City can actively seek developers and operators. It is most likely that developers will want to build a minimum of 100 rooms and a site will ideally be within walking distance of the City Centre and the Leaning Precinct (particularly ECU).
- 2) Ideally, the Joondalup Cultural Centre, which it now has been decided will be built adjacent to the new West Coast College Hospitality School, will have some flexibility/capacity to act as a plenary session venue to create a conference/meeting venue in combination with the school. Cross-over use should be encouraged by the City.
- 3) The Cultural Centre can be a driver of tourism/visitor growth to the City Centre and a source of customers for City Centre businesses. The level of success will depend on the number of events/performances, their quality and their participant/audience drawing power. In the venue planning stage, the City must clearly determine functions and viability for the Cultural Centre. It may be more appropriate to plan for a separate future conference/ meeting venue in partnership with either ECU and other Learning Precinct partners or with an accommodation developer.
- 4) Joondalup Resort is expanding its number of rooms and its meeting/function space. Going on past performance, the upgrade will attract more visitors to the resort.

Any new developments in the City are considered to be complementary rather than competitive with existing operators. Therefore, the City should support both existing and proposed developments if they are deemed to be in the interests of the community.

- 5) The City should continue to support public art projects, design initiatives and parks development because these will attract visitors to the City Centre and the City in general.

Transport

Overview

Private transport will continue to dominate the movement of tourists in the City. Therefore, road signage is critical for safety and the quality of visitor/tourist experiences.

Public transport to Joondalup City is among the best in WA. The issues for tourists are routes, scheduling and awareness. However, it is a critical strategy to encourage as many tourists as possible to use public transport. This will ease pressure on the tourism development zones, whose value as tourism assets could be reduced, particularly through expansion of vehicle parking facilities.

Objective

Increase the number of visitors/tourists utilising public transport.

Recommended Strategies

- 1) Seek the extension of the TransPerth beach bus services to link primary beach nodes with each other and the rail stations, particularly the new Greenwood station. In co-operation with the City of Stirling, seek to have TransPerth increase its marketing of these services.
- 2) Continue to promote public transport to the City's major events by including details in promotional activity.

Implementation

Overview

The implementation of the Tourism Development Plan has two specific phases. They are

- A **start-up phase** during which City Commissioners and management call for stakeholder input to the draft and after reviewing the input finalise the Plan and allocate City management roles and responsibility for specific objectives and strategies.
- The start-up phase will require internal City management policy decisions and liaison with external stakeholders, primarily state government agencies, such as Tourism Western Australia and the Department of Conservation and Land Management.
- An **ongoing phase** of implementation, performance measurement and review by responsible management. This includes decisions to adjust the Tourism Development Plan in response to new opportunities, changes in infrastructure development timelines, budget issues and other impacts.

The implementation issues which follow highlight the roles of stakeholders and the need for co-operation between the City of Joondalup and external parties, both in marketing and development activities.

Recommendations are made on the start-up phase, particularly where an internal City management process is proposed.

Roles

The role of the City of Joondalup in the Tourism Development Plan is to:

- create the planning and development environment that will deliver quality recreational and tourist experiences, and
- participate in the communication and marketing of these visitor experiences to selected tourism markets and to its community.

The role of business is to market themselves, deliver quality service and increase visitor spending in order to generate improved business profits, values and employment.

The role of community is to welcome, inform and protect visitors.

Co-operation

In fulfilling its recommended role, Joondalup City will find it essential to engage with the cities of Wanneroo and Stirling.

Local Government Co-operation in Tourism Marketing and Development

Although it is appropriate to identify tourism development zones within the City's boundaries, the relationship of the City's tourism industry to the Sunset Coast marketing region/destination demands co-operation with the adjoining local authorities, i.e. City of Wanneroo and City of Stirling.

Tourists are unlikely to take notice of local government boundaries, so they have little relevance to the destination's promotion and development.

Marketing Co-operation

The City of Joondalup will participate in marketing its tourism assets in co-operation with other local government authorities that together make up the sub-region marketed as the Sunset Coast. This will include support for promotional material such as the Sunset Coast Visitor Guide brochure, which has been supported in the past.

However, there is an opportunity for a more effective and strategic approach to co-operation in marketing, above and beyond buying an advertisement or giving a grant.

For instance, Yellagonga Regional Park and Lake Joondalup is a major tourist attraction that can work for both the City of Joondalup and the City of Wanneroo, and, to a slightly lesser extent, Stirling. Yet little marketing has been done to exploit the obvious tourism potential.

With coordinated strategic planning, Joondalup and Wanneroo can brand and promote this park as a significant and unique eco-tourism destination/experience that will draw people to the region and contribute to the regional economy.

Lake Joondalup is the largest natural body of water/lake within 40kms of Perth, and is a significant **visual** and **natural** experience.

Neil Hawkins Park (Joondalup) and Scenic Drive Park (Wanneroo) are the recommended points of entry for this attraction.

Recommended Strategy

The tourism officers of each City meet to identify strategic marketing opportunities that will benefit all three cities, and that this meeting be formalised to the extent that it occurs twice a year, once in the lead-up to the Cities' budget planning period.

Development Co-operation

The Perth region tourism product and tourist experience will always be best served by a co-ordinated approach to infrastructure that meets a range of differing niche market needs.

One question that should be considered is: Should Perth's metropolitan coastline be all the same, or can it be managed and developed to meet a range of community and visitor/tourist needs?

Co-operation in planning through initiatives such as the Coastal Zoning Planning Strategy can, and should, lead to optimum results in an environmental, social and economic sense.

For Joondalup and Wanneroo, the Wetlands Zone (primarily Yellagonga) is a critical opportunity to join CALM in creating a recreational and educational environmental resource that offers an appropriate range of complementary facilities and experiences.

For Joondalup and Stirling, the opportunity exists to complement the proposals for short-stay accommodation and entertainment in the Scarborough precinct with a nature-based eco-experience emphasis on Joondalup's coast.

The facilitating role of the Eastern Metropolitan Regional Council on tourism marketing and development for its member authorities is an excellent example of co-operation in defined areas. However, the Mindarie Regional Council is currently not empowered to involve itself in areas other than waste, and it is unlikely, due to its wider geographical base, to be able to perform a broader co-operation role on behalf of its members. Other local government groupings exist and should be considered as vehicles for development co-operation.

Recommended Strategy

The City continue considering its planning initiatives in its tourism development zones in the context of wider north-west corridor strategies and to place tourism infrastructure and attractions on the agenda of ongoing strategic meetings with adjacent cities and state government agencies.

Responsibility within the City of Joondalup Administration Structure

If the Tourism Development Plan is to be effectively implemented, it will require understanding, acceptance and commitment from all City business units.

The TDP must become an integrated, but identifiable, part of the City's total planning and work. It cannot be the responsibility of a single unit or a single officer.

Decisions impacting on its successful implementation will be made by all divisions and units, but particularly:

Planning and Community Development

- Approvals, Planning and Environmental Services
- Community Development

Corporate Services and Resource Management

- Financial Services
- Assets and Commissioning

Infrastructure and Operations

- Infrastructure Management and Ranger Services
- Operations Services

Office of the Chief Executive Officer

- Marketing Communications and Council Support
- Strategic & Sustainable Development

Recommended Strategies

- 1) That in each business unit, a position/person be allocated for a minimum of a year as the unit's primary TDP contact. The person will be the contact for tourism development issues and will have a thorough understanding of the TDP and its impacts.
The person would act as an initial contact with external customers on tourism matters and as the contact for a Tourism Development Officer.
- 2) A Tourism Development Officer and his/her manager to meet quarterly with the tourism contact persons to review and discuss tourism issues and opportunities in the context of the TDP. These meetings would be an adjunct to the established Business Unit Managers' meetings and minutes from the tourism meetings would be an agenda item for the BUMs' meetings.
- 3) To ensure the TDP is co-ordinated across the business units and integrated into the City's processes, it is recommended that a staff position (Tourism Development Officer) be created within Strategic and Sustainable Development.
It is recommended that this be a full-time position for a minimum of two years and then reviewed with the potential for it to be 0.5FTE, shared with another appropriate function within Strategic and Sustainable Development, into the future. It is envisaged the TDP would then be integrated.
The role of Tourism Development Officer is summarised in the following position description.

Tourism Development Officer – Recommended Position Description

Tasks of the officer would be to:

- establish and facilitate networks for the City and its tourist operations, in order to assist with the acceleration of tourism
- review the tourism development plan annually and re-establish an annual action plan and priorities
- facilitate the City's Tourism Marketing Action Plan
- encourage the adoption of best practice in tourism operations by supporting business accreditation schemes, such as Ecotourism Australia's certification program and National Tourism Accreditation Program

- meet with City of Wanneroo, City of Stirling, Sunset Coast Tourism, Experience Perth Tourism, and Tourism Western Australia to identify and facilitate appropriate co-operative marketing and product development activity
- develop and maintain performance-monitoring mechanisms
- provide policy input and market intelligence to City management on tourism matters
- grow the tourism profile of the City through representation at appropriate tourism industry forums.

The officer's experience and skills should include:

- minimum three years in the tourism industry, with experience in marketing and product development
- minimum five years work experience
- tertiary qualifications in tourism
- high quality presentation and communication skills, including written skills.

Performance Measurement

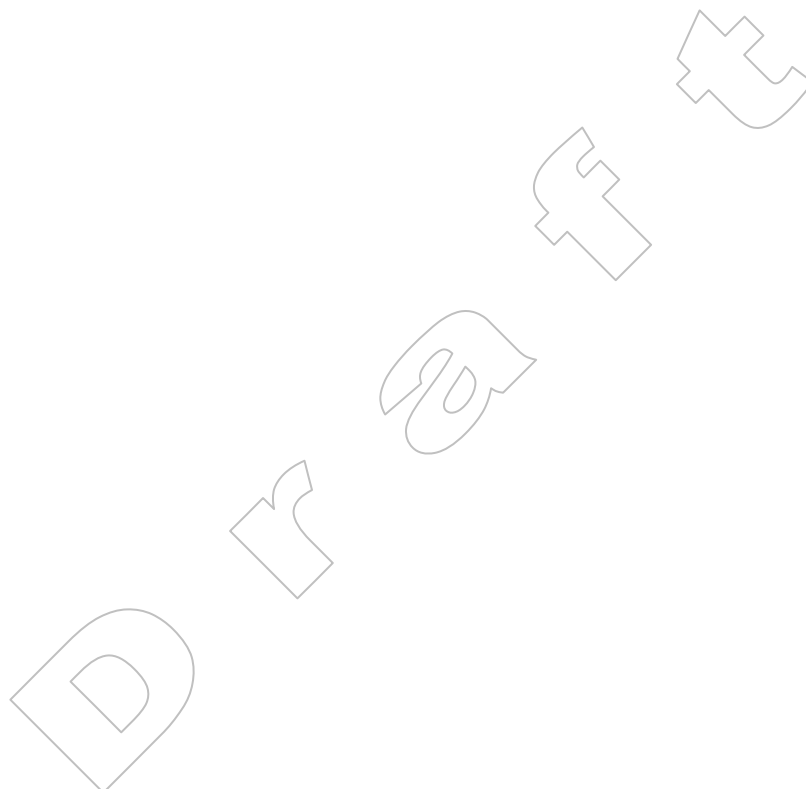
The Strategic and Sustainable Development Unit and the Tourism Development Officer will appropriately monitor tourism growth in the City and implementation of the TDP.

Recommended Strategies

- 1) Agreed actions in the TDP should be monitored for their progress and completion
- 2) Review TWA annual visitor research on the City's performance in the context of:
 - Visitor numbers to Joondalup as a share of the Perth region
 - Visitor numbers to Yellagonga Regional Park and Marmion Marine Park (as supplied by CALM)
 - Visitor nights growth.
- 3) Monitor take-up on development opportunities created by the City, e.g. recommended café developments, licensed operations, short-stay accommodation and the like.
- 4) Develop, in co-operation with TWA, Experience Perth and Sunset Coast, tourism research tools that will measure local (City of Joondalup) economic impacts.
- 5) Monitor community communications with the City on tourism matters.

The major issue for definitive performance measures of local tourism remains the fact that it is impacted by a range of parties and factors, such as private operators, state government actions, competitor activity, national and international security, airline capacity and room availability.

While local government cannot control these factors, **the City can make a difference** — by implementing its Tourism Development Plan and ensuring that it remains a living, relevant document.



Funding

While implementation of the Tourism Development Plan primarily involves strategic and tactical changes to the City's established activities, it does call for some additional funding allocation or the redirection of existing expenditure.

Operational Costs

Specific annual operational expenditure of approximately \$130,000 is recommended:

| | |
|--|------------------|
| ▪ Tourism Development Officer (full time in first two years) | \$ 50,000 |
| ▪ Marketing | \$ 70,000 |
| ▪ Meetings/forums | <u>\$ 10,000</u> |
| ▪ Total | \$130,000 |

Other recommended strategies call primarily for a change in tactics and image.

Infrastructure Costs

The TDP does not propose that the recommended infrastructure developments be considered as additional costs. Clearly, the City has finite revenue flow for capital works and, apart from possible federal or state government competitive grant monies (which may be applicable), recommendations must be incorporated into the City's budget and Principal Activities Plan by usual processes.

A number of the infrastructure recommendations will, in fact, need to be subject to discrete feasibility studies to ascertain final impacts and costs.

Funding Sources

The funding of tourism development and marketing activity by local government is often facilitated by specific strategies which are directed at either:

- Those sectors of the community that most directly benefit from visitor expenditure, and
- The users (tourists).

Local government has the capacity and, in a number of places around Australia, does raise revenue through **differential rating** for tourism zones or specific **tourism levies** on rateable businesses. Such levies can also be for the broader role of economic development and are normally applied only to business properties, not residential. Because of the secondary economic impacts of tourist expenditure, the concept is seen as equitable, as all parties contribute.

However, differential rating or a tourist levy has most often occurred where tourism is a very visible and significant contributor to a community's sustainability. It is not recommended for Joondalup City.

Local government is also able to create significant and specific budget allocations for tourism promotions if an asset that it owns is driven by tourism. For instance, Kalgoorlie-Boulder and Albany are creating significant tourism promotional budgets through the allocation of airport operating surpluses.

The concept of user pays or the creation of revenue flows to the City from charges levied against individual tourists or tourist operators could also be considered.

This is possible where the City owns or manages an asset, or creates one. The process, however, is complex because it is hard to differentiate between locals and visitors/tourists. Also, the cost of collecting entrance charges may outweigh the revenue collected.

Opportunities that have been considered by other local governments include:

- Park entry fees
- Vehicle parking fees
- Charges on tourist operators, such as coaches at City attractions.

This strategy is also considered inappropriate in the context of the City's current range of attractions and infrastructure.

Funding of tourism promotion and infrastructure development should be recognised as an integral function of the City in delivering on its vision for its business and residential community.

When allocating tourism marketing funds, it should be remembered just how dependent many of the City's businesses are on visitor expenditure and the extent of City revenues raised from sectors very dependent on tourism, e.g. Hillarys Boat Harbour tenants, Joondalup Resort, Sorrento Beach Resort, Lakeside Joondalup Shopping Centre, Whitford City Shopping Centre.

The TDP's marketing strategy also highlights the need and the capacity for the City to leverage co-operative funding from industry in support of its tourism promotion efforts. It is also important to share costs with other local government authorities in areas such as research and marketing.

APPENDIX 1 - The Definition of Tourism, Its Value and Impacts

The Definition of Tourism

Tourism's contribution to Western Australia's economy continues to grow and will further increase in significance over the years as a prime generator of economic and social benefits for the state, particularly in regional communities.

Recent Tourism Western Australia (TWA) reports confirm tourism is one of WA's leading industries in 2003, accounting for 3.5 per cent of the state's economic activity (Gross State Product) and providing jobs for somewhere between 72,000 and 80,000 people. This represents about 8 per cent of total employment in the state.

Growth for the next ten years is forecast by TWA at 4.6 per cent per annum with the international component growing at an average of 6.2% per annum.

Statistics raise the question: How do you define what is a tourist? The definition for international and interstate tourists is easy to categorise, but not so for intrastate visitors.

In current research by TWA, international/interstate visitors are defined as overseas/interstate residents aged 15 years and over who spent at least one night in WA (US Navy personnel included). Domestic visitors are similarly defined as Australian residents aged 15 years and over who spent at least one night away from home in WA destinations.

This generally accepted definition of a tourist does not include day-trippers, who, for some destinations, can represent the major component of tourist visitation. Destinations in, or close to, Perth fall into this category. They include those in the City of Joondalup.

The House of Representatives Select Committee on Tourism (1978) defined tourists as "persons who travel more than 40 km from their normal place of residence for any reason other than to commute to a normal place of work".

The Australian Government Committee Inquiry into Tourism (1987) defined a tourist as either:

- A person who undertakes travel, for any reason, involving a stay away from his or her usual place of residence for at least one night; or
- A person who undertakes a pleasure trip involving a stay away from home for at least four hours during daylight, and involving a round distance of at least 50 km; however, for trips to national parks, state and forest reserves, museums, historical parks, animal parks, or other man-made attractions, the distance limitation does not apply.

It can be seen that there are difficulties in establishing a clear and unified definition of a tourist, a situation recognised by a statement from tourism authors William and Shaw (1988), who observed that "the definition of tourism is a particularly arid pursuit" and then went on to state:

... the definition of the tourism industry is crucially important. In most countries tourism is "statistically invisible" and usually only the most obvious sectors or those exclusively devoted to tourists are enumerated in official tourism data. Inevitably, this tends to be the accommodation sector and, perhaps, cafes and

restaurants. Yet the tourism industry is far larger than this. Tourists also spend money directly on recreational facilities, tourist attractions, shops and local services. In turn, these have indirect effects on agriculture, wholesaling and manufacturing, while secondary rounds of spending of tourism create induced linkages in the economy.

From Joondalup's perspective it is important to recognise the following influences on tourism in the context of available research and the definition of a tourist:

- there is a level of corporate/business traffic included in the available visitor statistics;
- this traffic is important (if not critical) to sustain the infrastructure and service levels that are integral to tourism growth. Many corporate/business visitors also spend time on leisure activities;
- there are limitations to statistics relating to day-trippers.
Such visitors would be a very significant component of Joondalup's tourist visitation;
- strong visitation from some market segment may distort some statistical data.

As an example, while tourists in the caravan sector may stay longer in a destination, the money they spend in the region would generally be lower per day than for visitors in other market segments. Similarly, a strong backpacker market would tend to reduce the level of expenditure on transport and accommodation, but generate an increase in spending on experiential activities.

These matters are raised simply to indicate the issues associated with the definition of a tourist and the interpretation of statistical data relating to the tourism industry.

Ideally, each local authority should establish its own tourism data base, but this is generally impractical. Therefore, local authorities depend on state and national figures, which are provided through TWA and the Bureau of Tourism Research (BTR). This means the industry must rely on the definition of a tourist used by those agencies.

The Value of Tourism

This section discusses the value of tourism to the world, Australian and WA economies.

The World

Travel and tourism is the world's biggest industry, employing 67.4 million people worldwide or 2.6 per cent of all jobs in 2003. Travel and tourism is expected to generate US\$4,544.2 billion of economic activity (total demand), including 3.7 of GDP (US\$1,280.4 billion).

Source: World Travel and Tourism Council and World Tourism Organisation 2003.

Australia

In 2001-02, tourism's contribution in the Australian economy was \$70.8 billion, a decrease of 0.7 per cent on 2000-01— both domestic and international tourism consumption dropped. In 2000-01, tourism GDP was 4.5 per cent (falling from 4.8 per cent), while the overall economy displayed

strong growth of 6.5 per cent. There was a 0.6 per cent growth in Tourism Gross Value Added (GVA) — which is GDP less taxes on products. In 2001-02, 549,000 persons were employed in tourism, representing a marginal decrease on 2000-01. Share of total employment dropped to 5.9 per cent from 6.0 per cent in 2000-01. In 2001-02, there was \$17.1 billion in tourism exports. Total exports dropped very slightly and tourism maintained its share of 11.2 per cent.

Source: *Tourism Satellite Account, Australian Bureau of Statistics.*

Western Australia

The TWA's research brief's statistics referred to at the beginning of this section are confirmed by earlier official data from the Australian Bureau of Statistics in the first Tourism Satellite Account released for WA.

In 2002, more than 20 million trips were taken around Western Australia. Of these, 7.4 million trips⁸ (including intrastate) involved at least an overnight stay, 12.902 million day trips⁹ and \$4.6 billion¹⁰ estimated total expenditure (including day visitors).

Western Australia's first Tourism Satellite Account estimates that in 2001-02, 54,000 jobs are directly due to WA's tourism industry. An additional 18,000 jobs are indirectly due to tourism.

5.8 per cent of the state's employment is in the tourism industry. WA tourism industry directly accounts for \$2.2 billion of gross value added (value of industry's production before net taxes on products). This is 3.1 per cent of total WA value added and 3.5 per cent of gross state product, which equates to 8.5 per cent of Australia's total tourism value added.

WA accounts for 9.8 per cent of all direct tourism jobs in Australia.

Clearly, tourism is, and will continue to be, a key factor in WA's economic prosperity.

Tourism Industry Impacts

Developed and managed in a sustainable way, tourism can deliver a number of valuable benefits to a community — socially, environmentally and economically.

These benefits for Joondalup City can include:

- Strengthening of social and cultural lifestyles through incremental visitor support and expenditure at events, cultural venues and the like, with funds flowing to involved community groups across heritage, arts and sporting activities.
- Enhancement of the economic value of natural environments, which may be under pressure from developers for residential, light industrial and retail use. The attraction of tourists to these natural environments generates real moral and economic support to enhance and manage these assets.
- Economically, tourism (visitors) directly contribute, through expenditure, to:

⁸ Source: Bureau of Tourism Research (National Visitor Survey)

⁹ International Visitor Survey

¹⁰ Regional Expenditure Methodology

- business revenues and business values (thus local authority rates),
- employment, and
- support of public services, such as transport, cultural activities and facilities.

In the report *The Economic Contribution of Tourism to WA (August 2003)*, Access Economics says accommodation, café and restaurants are 34 per cent dependant on tourism for industry value added.

The importance of tourism to other industries is discussed in the same report. Tourism's contribution to other industries in 2001-02 was:

| Tourism's Contribution to other Industries Direct Tourism Value added - Western Australia 2001-02 | | |
|--|----------|--------------|
| Industry | Tourism | |
| | Value | Share |
| Accommodation, cafes and restaurants | \$431m | 19 per cent |
| Air and water transport | \$343m | 15 per cent |
| Retail trade and takeaway food | \$314m | 14 per cent |
| Ownership of dwellings | \$144m | 6 per cent |
| Services to transport | \$133m | 6 per cent |
| Education | \$102m | 5 per cent |
| Land transport | \$95m | 4 per cent |
| Wholesale trade | \$92m | 4 per cent |
| Food products | \$84m | 4 per cent |
| Cultural and recreational services | \$82m | 4 per cent |
| Other industries | \$429m | 19 per cent |
| Direct Tourism Value Added | \$2,249m | 100 per cent |

APPENDIX 2 - The Planning Process for the Tourism Development Plan

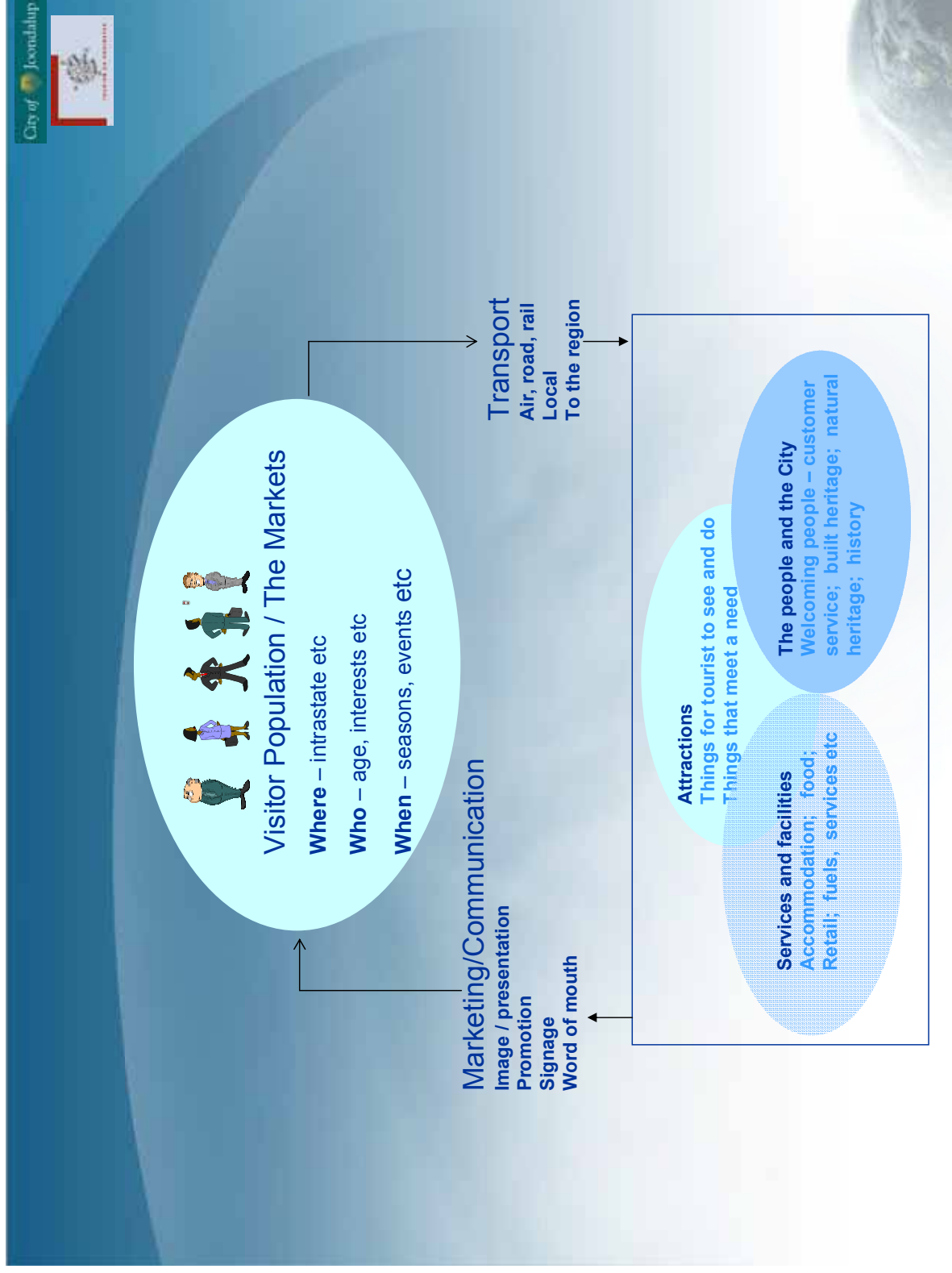
Creation of a Tourism Development Plan (TDP) requires a holistic understanding of the industry, which like many sectors in the economy, involves private industry, community, not-for-profit bodies and local, state and federal governments.

It is an export and local industry, with supply and demand components.

In its simplest form, the graphic (Figure 1, next page) emphasises the basic components, i.e. a destination composed of products/experiences (supply) and markets/visitors (demand).

The destination must communicate with markets and stimulate visitation (marketing) and there must be transport connections.

The existing roles of the community, government and industry on the supply side are illustrated in Figure 2.



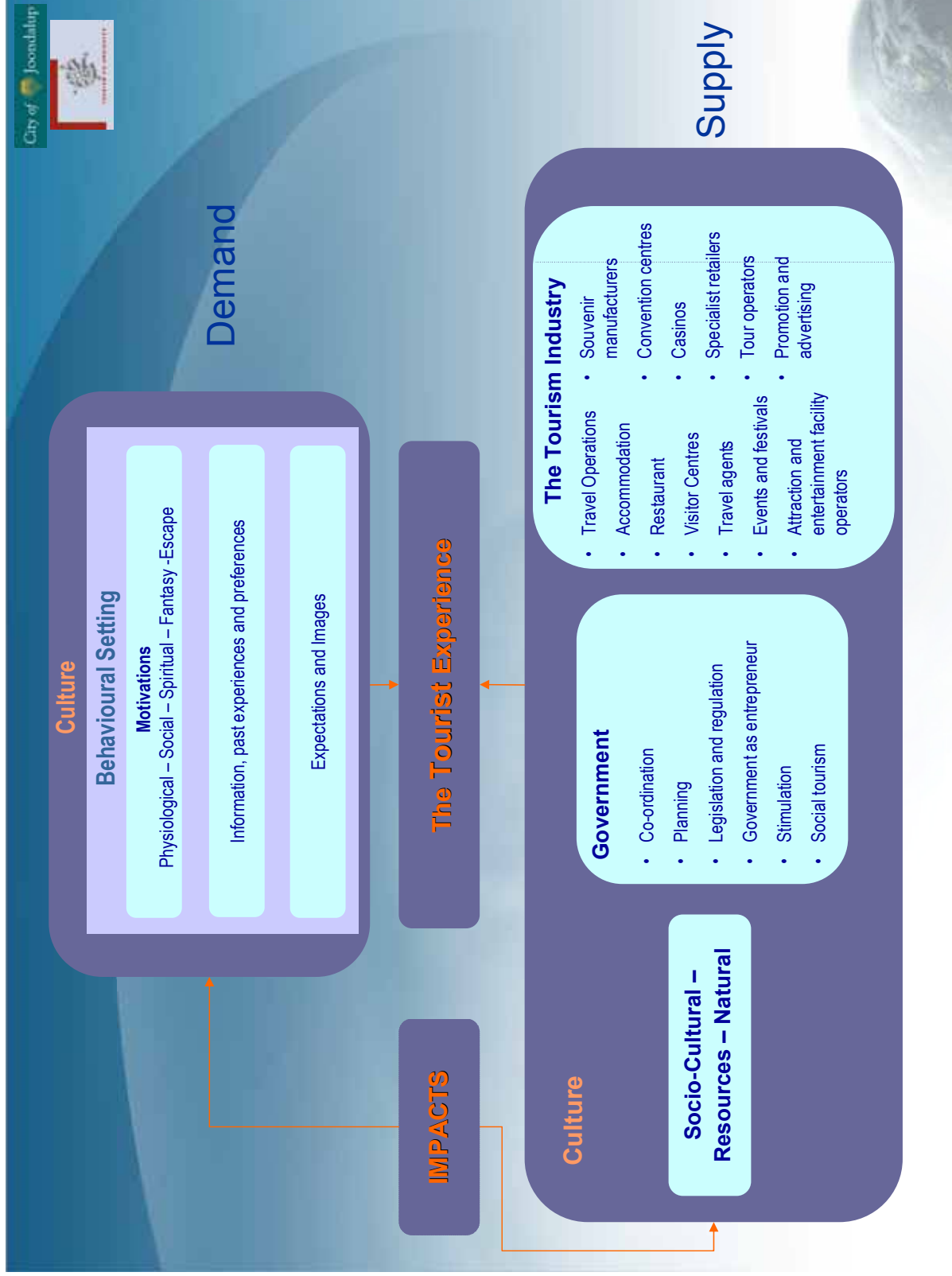


Figure 2

In producing this Tourism Development Plan, the consultants were directed by a Brief prepared by the City of Joondalup and an agreed process that has seen:

- a review of existing relevant tourism research,
- consultation and workshopping with industry, government and community,
- consideration of existing City planning,
- preparation of a Draft Plan for review by appropriate industry, government and community, and
- consultation and review with City management.

Very significantly, the process of developing the TDP, as a priority, took into account the wishes of the City's **community (residents) and businesses** as to the type of tourism they want and the outcomes they want to achieve from tourism.

The process examined the existing and the potential experiences/products (supply) and market demand, and then mapped a way forward for development (infrastructure, etc.) and marketing.

The Tourism Development Plan covers the five-year period 2005-09. It should be reviewed annually in conjunction with City planning and budgeting considerations.

The emphasis in the TDP is on:

- eco or environmental tourism
- cultural tourism
- business tourism (meetings, incentives conferences, exhibitions)
- event tourism
- education tourism
- visiting friends and relatives (VFR).

Markets include:

- international
- interstate
- intrastate
- day trippers.

Appendix 3 - Community and Tourism Industry Input

As part of the consultation process, workshops were held with community groups and representatives of the tourism industry.

The ideas, visions and criticisms that were presented by workshop attendees are integral to the recommendations in this document.

Two workshops were held and the subjects discussed are summarised below. In addition, one-on-one interviews were held with a number of stakeholders.

Tourism Development Plan Workshop for Tourism Industry Representatives, 2pm Wednesday, 14 April 2004

Organisations/businesses represented were:

Perth Convention Bureau
Department of Conservation and Land Management
Sunset Coast Tourism Association
Sorrento Beach Resort
Burns Beach Sunset Holiday & Leisure Village
Perth Region Tourism Organisation
Botanic Golf
West Coast College of TAFE
Edith Cowan University
WA Tourism Commission
Joondalup Business Association
Business Enterprise Centre
Whitford City Shopping Centre
Lakeside Joondalup Shopping Centre
Arena Joondalup
Hillarys Boat Harbour
Joondalup Resort
Excel Education
Focus Planning

The well-attended workshop provided lively discussions from participants.

While there was general consensus that the tourism industry should be encouraged to grow, this should happen only if activities are sustainable.

The area's unique natural attractions and ecological balance should be respected when development proposals are considered.

Items listed by attendees for discussion were:

- Need for a tourism information centre
- Access to the Joondalup area
- Transport to tourist destinations within Joondalup

- Edith Cowan University's role in providing tourism information to students and visiting academics
- Interface between tourism and education
- Implementation process for the Tourism Development Plan (TDP)
- Business Tourism, formerly known as MICE (Meetings Incentives Conventions Exhibitions) tourism:

1. Educational, and

2. Medical

- Mapping of attractions in Joondalup (natural and built)
- Branding Joondalup as a tourist destination and its role in the Sunset Coast marketing group
- City of Joondalup logo is well recognised
- Lack of City Centre visitor accommodation
- Lack of visitor accommodation in the City of Joondalup. Major tourism businesses operate in City of Joondalup, yet there is very little tourism accommodation.
- Existing tourist operations under threat from high local government charges. Policy needed.
- Linkages to regions and marketing organisations, including the Perth Convention & Exhibition Centre (PCEC)
- Value adding initiatives
- Events
- Joondalup regional performing arts centre should be multi-use facility
- Ocean Reef marina site's importance as a regional recreation area.

During discussions, the following points were made by workshop participants.

There is a need to eliminate the seasonality of tourism along the Sunset Coast and the aim is to build a tourism region for all seasons.

The City of Joondalup offers a unique cultural experience based on cultural heritage and natural attractions. This can be supplemented by educational and medical tourism as a learning environment has already been established under the City's Learning City Strategy.

The TDP should encourage managed development of attractions and experiences; they must be sustainable.

A pent-up market demand exists for additional coastal recreation. Hillarys was designed for 1.5 million visitors a year — currently gets about 3.5 million. The region's boating harbours/marinas could be linked to create a visitor environment such as exists at Rottnest.

While the City of Joondalup has a lack of swimming beaches, there are unique coastal reefs, which offer unique tourism experiences, such as diving.

It is important to cater for all age groups of visitors.

The TDP should list benefits that local residents will receive as a result of increased visitations. Slow incremental growth is favoured, with increased tourist numbers coming from topping up facilities that ratepayers currently use. Tours of educational and industrial operations in City should be encouraged.

The City of Joondalup has no “must see” icons, so marketing could be aimed at a “total experience”.

The City of Joondalup lacks a major choice of cafés and restaurants. There isn’t a cappuccino strip as in Fremantle.

There is a lack of attractive directional signs. Joondalup doesn’t feel like a tourist destination. Needs bright signage, à la Swan Valley. Signage need not direct visitors to commercial operators, but rather to look-outs and natural attractions.

Coastal drive stops at Ocean Reef. It should continue up the coast and provide access to amenities.

City of Joondalup has no designated tourism information centre. Shopping centre information desks act in a de facto role and give out information such as the Sunset Coast brochure and flyers on accommodation, hire cars and the like. Sunset Coast brochure only contains information about members of the association. A dedicated visitor centre in Joondalup would require extensive financial resources. Volunteers could help to keep down costs.

Major events put pressure on City of Joondalup parking resources, especially those held at Joondalup Arena. Shuttle buses and a railway events platform would encourage events visitors to use public transport.

When it opens, Greenwood railway station could be a hub for people wanting to use public transport to visit Hillarys if a shuttle bus service were provided. A shuttle bus (similar to Perth and Fremantle CAT services) to City of Joondalup visitor attractions would encourage more visitors who do not have a motor vehicle (eg. students, overseas visitors).

When completed, the Perth to Mandurah railway line will be a threat to increased visitations along the Sunset Coast. A Sunset Coast bus service would help to counter this.

Extended retail trading hours is an issue if the number of tourism precincts in the Perth metropolitan area is increased. Scarborough could be next.

Research shows tourists want more hours in which to shop. Shopping is a significant activity for visitors.

More linkages should be established between Joondalup and private education providers to increase its profile as a learning city.

City of Joondalup has a large number of overseas students, about 30 per cent of whom live in the City of Joondalup. Yet, 70 per cent of these go to Northbridge for their leisure activities because they rely on public transport.

City of Joondalup's cosmopolitan population and relaxed lifestyle should be included in promotional material. Students can be ambassadors for Joondalup in attracting more visitors from overseas.

Growth of the business tourism market in City of Joondalup is hindered by a lack of accommodation in the City Centre. Delegates to educational and medical conferences do not want to travel long distances to their accommodation.

If built, the Joondalup performing arts centre should be multi-use so that more conferences and conventions can be held in Joondalup. The market for smaller off-site venues will grow now that the Perth Convention & Exhibition Centre is operating.

The Ocean Reef marina site is a strategically-placed leisure area that should be developed. Some land is owned by City of Joondalup, which would play a pivotal role in planning. Hillarys/Sorrento Quay can be replicated at Ocean Reef, with the opportunity to improve on what has been done at Hillarys, including a greater emphasis on eco-tourism. A creative design should be encouraged. A maritime navigational school could be included as part of the Learning City strategy.

Creation of a dive wreck in the City of Joondalup should be investigated. Underwater dive trails already exist in City of Joondalup, but these are not currently well promoted.

Lake Joondalup could be developed along similar lines as Lake Monger, with people having greater access to lake-side leisure activities, such as walking.

Tourism Development Plan Workshop for Community Groups - 6pm Wednesday, 21 April 2004

Organisations/businesses represented were:
Harbour Rise Homeowners Association
South Ward Ratepayers & Electors Association
Inner City Residents of Joondalup Inc
Friends of Korella Park Bushland
Friends of Yellagonga Regional Park Inc (from CALM)
Joondalup Community Coast Care Forum Inc
Yellagonga Catchment Group Inc
Periwinkle Bushland Group
A former councillor

After a general introduction by the consultants, attendees listed subjects they would like to discuss during the evening.

Items listed by attendees:

- Concern about the lack of council planning guidelines for building heights, density, etc. Afraid the Joondalup coast could become another Gold Coast
- Eco-tourism requires long-term investment rather than short-term profit motives
- Should be a balance between natural forms and built forms
- Amenities in residential areas should be preserved
- Marketing and promotion of tourism
- Policy needed on tourism accommodation, as opposed to current policy on permanent accommodation in Joondalup City Centre
- Policy needed on risk management, particularly in view of global threat of terrorism attacks
- Public transport needs to be improved
- Important to make better use of existing infrastructure
- Role of small business and employment (particularly youth employment).

The attendees then convened as three groups to prepare items that they believed should be considered when the TDP is prepared. The subjects they were to consider came under the following groupings:

- A vision for tourism in the City
- Major opportunities and threats for the City's businesses and community from tourism
- Opportunities to develop products and experiences for tourism markets
- The City of Joondalup's role in the tourism industry.

A representative of each group then presented its findings and opened the workshop to discuss those items.

Group One's presentation included the following items:

- The group's vision for tourism in Joondalup is that the industry should be centred on eco-tourism (particularly the area's unique land forms, flora and fauna) and education (including marine park education opportunities and existing institutions)
- Social tourism, utilising libraries, community centres
- Cultural tourism (area's strong historical background)
- Better public transport needed to draw more visitors from areas that have tourism accommodation
- Set up community youth groups to promote Joondalup

- Encourage young people to start up tourism-related businesses such as wind surfing, fishing rod hire, bicycle hire, pram hire; coastal paths can be promoted as participation and fun tourism (roller-blading, and the like)
- Establish areas for markets, eating out — create a theme to be different to Fremantle
- Promotion of Joondalup tourism should be targeted at specific groups, interstate and overseas
- Business tourism will be important — host smaller conferences — golf, swimming, sporting facilities already exist
- Use opportunities to network
- Threats include the City will have only one opportunity to get it right with the environment (parks, coast, wetlands), uncontrolled access to sensitive coastal areas, unsustainable use of beach areas (dog faeces).

Group Two's presentation included the following items:

The group's vision for tourism in the City is that there should be an appropriate mix of eco-tourism, business tourism and education tourism.

- Public transport needs to focus on the city centre with links to coastal, shopping and other tourism attractions, including a Sunset Coast Shuttle. This would benefit residents as well as visitors
- Accommodation is required in and close to the Joondalup City Centre, with appropriate transport links — would provide employment opportunities for the area's large student population
- Opportunities available in providing food outlets, services used by visitors — focus on niche markets, target things that are unique to the City;
- Upgrade facilities that already exist (such as shopping centres, parks, cafés) rather than building new ones
- Create more tourism opportunities by, for example, improving access to coastal areas and national parks
- Attract major events to Joondalup, including those that would benefit young people
- Establish Joondalup as a coastal-focus tourism centre
- Major threats include destruction of residential amenity; invasion of privacy; more traffic; increased crime; increased pressure on existing businesses; tourism-related global issues; destruction of natural environment; visual pollution by built forms
- Must promote what is unique in the City; for example, Joondalup is the only City with a clearly defined city centre
- Council must have policies in place to control future development of building height and density, parking, short-stay accommodation and environmental policy

- Council should be involved in marketing and promotion to tourism industry, potential tourists
- Council to be responsible for general upkeep and maintenance of infrastructure
- Council must protect lifestyle of existing and future residents

Group Three's presentation included the following items:

- The group's vision for tourism in Joondalup is that it should incorporate:
 - Preserving the unique, natural coastal strip
 - Preserving and developing existing environmental treasures
 - Educating tourists about the City's natural assets
 - Avoiding high rise development along coastal strip
 - Improving accessibility to existing beaches
 - Retaining a balance between built and natural attractions
 - Improving existing infrastructure — for example, consolidating food outlets where buildings already exist, rather than creating new buildings
 - Improving transport from accommodation areas
- The group's suggested vision statement is: "To build and promote tourism in the City with its community, educators, planners, legislators and businesses to protect, enhance and develop its natural and unique environment for tourism."
- Opportunities were listed as:
 - Encouraging private light transport
 - Small retailers, more variety, incorporating eco-tourism
 - Better promotions
 - Greater council support for businesses such as wind surfing, surfing schools, fishing instruction and other leisure pursuits
 - Train people to conduct guided walks (and promote this activity)
 - Creating more jobs
 - Capitalise on key, high locations such as Ocean Reef Reserve for small business, including cafés, and serviced by walk and cycle paths
 - Build on existing heritage — Aboriginal and European
 - Support for more B&B establishments.
- Major threats were listed as:
 - Copy-cat of other tourism areas
 - Destruction of unique natural areas

- High rise development
 - Pollution, rubbish, destruction of marine systems
 - Impact of erosion on dunes, loss of biodiversity
 - Lack of parking
 - Fishing
 - Water quality
 - Inappropriate infrastructure
 - Uncontrolled access to sensitive areas.
- The roles of the City of Joondalup in the TDP were listed as:
 - Provide leadership — drive the vision for ethical tourism
 - Provide expertise and a focus for initiative
 - Ethical legislation for decision making
 - Provide attractive signage to natural attractions and control signage to commercial operations
 - Promotion.

Workshop participants said emphasis should be placed on educating the City's young people about the benefits of eco-tourism and the area's attractions. Young people working in the hospitality industry should be encouraged to be the City's "ambassadors" by telling visitors about Joondalup's attractions and opportunities for a nature-based lifestyle.

The workshop concluded with an oral and written submission from the Joondalup Community Coast Care Forum suggesting that the City of Joondalup and Kings Park jointly develop a coastal eco-tourism centre in Tom Simpson Park.

Appendix 4 - Existing Markets and Marketing

Perth Region and Joondalup

Existing Market

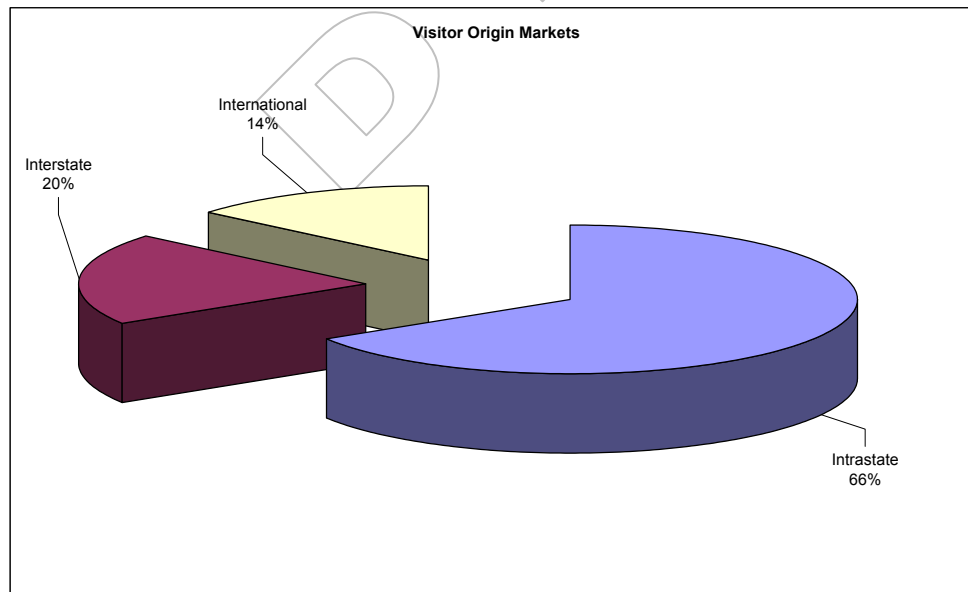
Joondalup is a component of the Western Australia Tourism region described as *Experience Perth*. It includes 45 local government areas including those tourism areas variously described as Perth, Fremantle, Peel (Mandurah), Rockingham, Fun Coast, Sunset Coast, Swan Valley, Avon Valley, Perth Hills (Darling Range) and Heritage Country.

Overnight Visitors:¹¹

The *Experience Perth* region accounts for 54 per cent of Western Australia's total overnight visitor numbers. Joondalup has less than 1 per cent of that region's market. For instance, the City of Stirling, which has approximately four times the beds of Joondalup, accounts for only 1 per cent of the region's market. Fifty-three per cent of the region's overnight visitors stay in Perth City, followed by Mandurah with 10 per cent.

Visitor Origin Markets

Sixty-six per cent of the region's visitors are intrastate, 20 per cent interstate and 14 per cent international.



The main international market source is Britain, contributing 26 per cent of all international visitors.

Thirty-three per cent of all visitors to the region came to visit friends and relatives (VFR market).

Visitor trends are critical considerations in developing Joondalup's TDP.

¹¹ *Orange (Perth) Region Tourism Perspective TWA Dec 2003*

Currently, Joondalup's visitors are drawn from the following groups:

Intrastate

Day visitors from metropolitan Perth, primarily to participate in:

- water-based activities
- eating out at restaurants/cafés, visiting pubs and enjoying the nightlife
- shopping
- visiting friends and relatives (VFR).

International and Interstate

- VFR and staying privately
- day visitors enjoying:
 - water-based activities
 - restaurants, cafés, pubs and nightlife (Hillarys is prominent)
 - shopping.

The following presents a profile of Joondalup's tourism industry. The Joondalup Fact Sheet was developed for this Plan from existing research by Tourism Western Australia.



CITY OF JOONDALUP



Amendment date: 13th July 2004

WHAT'S INSIDE:

City of Joondalup

International and Domestic Visitor Numbers

International Visitors

General Overview

Purpose of Visit

Age

Gender

Activities

First/Return Visit

Accommodation

Transport

Domestic Visitors

General Overview

Purpose of Visit

Age

Gender

Activities

Accommodation

Transport

Domestic Daytrip Visitors

Purpose of Visit

Gender

Age Group

Leisure Activities

Transport



Disclaimer:

This document has been prepared by Tourism Western Australia predominantly from information and data supplied to it by members of the tourism industry. Any other material contained in this document is of the nature of general comment and neither purports nor is intended to be advice on any particular matter. The Commission expresses no opinion on whether this document presents a true and fair view of any matter and no warranty of accuracy or reliability is given. No person should act on the basis of any matter contained in this document without consultation to an appropriate professional adviser.

HIGHLIGHTS- City of Joondalup

- There were 48,800 international and domestic overnight visitors to the City of Joondalup. (*2000 to 2003)
- International visitors' average length of stay is 8 nights, while domestic visitors stay around 3 nights. (*2000 to 2003)
- There were 365,500 domestic day visitors to the City of Joondalup (^002 to 2003)

* FOUR YEAR ROLLING AVERAGE

^ TWO YEAR ROLLING AVERAGE

City of Joondalup Profile

- International visitors' purpose in the City of Joondalup is predominantly for holiday and pleasure. (*2000 to 2003)
- Domestic visitors' purpose in the City of Joondalup is predominantly for visiting friends and relatives. (*2000 to 2003)
- International visitors are more likely to be male (63%), while domestic visitors are generally evenly split (54% females, 46% males). (*2000 to 2003)
- Social activities are the most undertaken activity in Australia for domestic and international visitors to the City of Joondalup. This includes visiting friends and relatives, going to restaurants, movies, pubs, sporting events, shopping, picnics/BBQ's etc. (*2000 to 2003)

* FOUR YEAR ROLLING AVERAGE

TOTAL VISITORS- CITY OF JOONDALUP

GENERAL OVERVIEW City of Joondalup

1999 to 2002* 2000 to 2003*

Total Overnight visitors (domestic and international) 38,900 48,800

Source: Bureau of Tourism Research International Visitor Survey, and National Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

INTERNATIONAL VISITORS- CITY OF JOONDALUP

GENERAL OVERVIEW City of Joondalup

1999 to
2002 *

2000 to 2003 *

| | | |
|--|----------|----------|
| Overnight visitors | 3,400 | 3,500 |
| Overnight visitors nights | 26,400 | 26,700 |
| Average length of stay | 8 nights | 8 nights |
| % of WA visitors who stay overnight in the City of Joondalup | 0.6% | 0.6% |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

INTERNATIONAL PROFILE

PURPOSE OF VISIT – International Overnight Visitors to City of Joondalup

1999 to
2002 *

2000 to 2003 *

| | | |
|--|-------|-------|
| Holiday/ pleasure | 61.1% | 70.5% |
| Other (including education, employment, in transit, medical reasons, other not stated) | 13.5% | 16.5% |
| Visiting relatives and friends | 27.7% | 14.1% |
| Business | 2.8% | 2.8% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

These figures do not add up to 100% as visitors may have more than one purpose for travel

AGE – International Overnight Visitors to City of Joondalup

1999 to
2002 *

2000 to 2003 *

| | | |
|---|-------|-------|
| 15 – 29 years old | 15.0% | 10.6% |
| 30 – 49 years old | 43.3% | 44.1% |
| 50 + years old | 41.7% | 45.4% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

GENDER – International Overnight Visitors to City of Joondalup

1999 to
2002 *

2000 to 2003 *

| | | |
|---|-------|-------|
| Male | 65.0% | 63.2% |
| Female | 35.0% | 36.8% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

| LESIURE ACTIVITIES UNDERTAKEN IN AUSTRALIA – By International Overnight Visitors to City of Joondalup | 1999 to 2002 * | 2000 to 2003 * |
|--|----------------|----------------|
| Social / Other | 90.8% | 91.9% |
| Outdoor / Nature | 79.2% | 81.4% |
| Local attractions / Tourist activities | 58.5% | 74.8% |
| Active outdoor / Sport | 62.4% | 47.3% |
| Arts / Heritage | 30.0% | 33.8% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

These figures do not add up to 100% as visitors may have undertaken a number of activities

* These figures are four year rolling averages to increase the reliability due to small sample sizes

Activity categories include: **Outdoor/Nature**-going to the beach, visit national/state parks, bush walking, rainforest walks, visit botanic/public gardens, go whale/dolphin watching, and visit farms. **Sports/active outdoor**-Scuba diving, go fishing, play golf, play other sports, other outdoor activities, and other exercise. **Arts, heritage or festival**-attend theatre, visit museums/art galleries, visit art/craft workshops/studios, attend festivals, fairs, cultural events, experience aboriginal art/craft and cultural displays, visit an aboriginal site/community, visit history/heritage buildings, sites or monuments. **Local attractions/tourist activities**-visit amusements/theme parks, visit wildlife parks/zoos/aquariums, go on guided tours or excursions, going to markets, tourist trains, visit industrial tourist attractions, visit wineries.

Social/sightseeing-VFR, eat at restaurants, pubs, clubs, discos, visit casinos, attend an organised sporting event, go shopping (for pleasure), general sightseeing, picnics/BBQs, ferry rides, tall ships, other tourist cruises, day trips.

| FIRST OR RETURN VISIT – International Overnight Visitors to City of Joondalup | 1999 to 2002 * | 2000 to 2003 * |
|--|----------------|----------------|
| First visit | 23.2% | 27.3% |
| Return visit | 76.8% | 72.7% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

| ACCOMMODATION – International Overnight Visitors to City of Joondalup | 1999 to 2002 * | 2000 to 2003 * |
|--|----------------|----------------|
| Hotel, resort, motel, motor Inn | 61.5% | 57.7% |
| Home of friend or relative (no payment required) | 28.5% | 22.3% |
| Educational institution (eg university) | 0.0% | 7.7% |
| Rented house / apartment / unit / flat | 4.1% | 7.0% |
| Caravan | 3.5% | 3.5% |
| Home stay | 2.0% | 1.9% |
| Other | 1.1% | 0.0% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

Percentages may not add up to 100% as visitors may have stayed a night in a range of locations

| TRANSPORT– International Overnight Visitors to City of Joondalup | 1999 to 2002 * | 2000 to 2003 * |
|---|----------------|----------------|
| Rental car | 34.1% | 43.0% |
| Private or company car | 33.3% | 27.0% |
| Other ** | 35.6% | 30.7% |
| Total Overnight Visitors to City of Joondalup | 3,400 | 3,500 |

Source: Bureau of Tourism Research International Visitor Survey

* These figures are four year rolling averages to increase the reliability due to small sample sizes

** Other includes: Hotel shuttle bus, coach, taxi or chauffeur driven hire car, self driven van, motor home or campervan etc.

DOMESTIC VISITORS- CITY OF JOONDALUP

| GENERAL OVERVIEW City of Joondalup | 1998 to 2001* | 1999 to 2002* | 2000 to 2003* |
|---|------------------|------------------|------------------|
| Domestic Visitors | 30,500 | 35,500 | 45,300 |
| Domestic Visitor Nights | 96,800 | 112,800 | 127,500 |
| Average Length of Stay | 3 nights | 3 nights | 3 nights |
| % of Overnight visitors to WA who stay in the City of Joondalup | 0.5% | 0.5% | 0.7% |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data.

DOMESTIC PROFILE

| PURPOSE OF VISIT – Domestic Overnight Visitors to City of Joondalup | *1998 to 2001 | *1999 to 2002 | *2000 to 2003 |
|--|------------------|------------------|------------------|
| Visiting friends and relatives | 65.6% | 61.4% | 61.4% |
| Holiday or leisure | 13.1% | 17.7% | 17.7% |
| Other | 15.7% | 13.5% | 11.7% |
| Business | 7.5% | 8.5% | 9.5% |
| Total Overnight Visitors to City of Joondalup | 30,500 | 35,500 | 45,300 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data.

These figures do not add up to 100% as visitors may have more than one purpose for travel

| GENDER – Domestic Overnight Visitors to City of Joondalup | *1998 to 2001 | *1999 to 2002 | *2000 to 2003 |
|--|------------------|------------------|------------------|
| Male | 36.1% | 43.1% | 46.4% |
| Female | 63.9% | 57.2% | 53.6% |
| Total Overnight Visitors to City of Joondalup | 30,500 | 35,500 | 45,300 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data.

Percentages may not add up to totals due to rounding

| AGE – Domestic Overnight Visitors to City of Joondalup | *1998 to 2001 | *1999 to 2002 | *2000 to 2003 |
|---|------------------|------------------|------------------|
| 15 – 29 years old | n/a | n/a | 37.5% |
| 30 – 49 years old | n/a | n/a | 33.8% |
| 50 + years old | n/a | n/a | 28.7% |
| Total Overnight Visitors to City of Joondalup | n/a | n/a | 45,300 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data.

Percentages may not add up to totals due to rounding

| LEISURE ACTIVITIES UNDERTAKEN IN AUSTRALIA – Domestic Overnight Visitors to City of Joondalup | *1998 to 2001 | *1999 to 2002 | *2000 to 2003 |
|--|------------------|------------------|------------------|
| Social and others | 97.7% | 98.0% | 97.1% |
| Outdoor or nature activities | 33.8% | 31.8% | 31.6% |
| Sports or active outdoor activities | 12.5% | 11.3% | 12.8% |
| Local attractions or tourist activities | 4.3% | 5.6% | 12.8% |
| Arts, heritage or festival activities | 1.0% | 2.8% | 2.9% |
| Total Overnight Visitors to City of Joondalup | 30,500 | 35,500 | 45,300 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data.

Note: Numbers and percentages may not add up to total as international & domestic visitors may undertake more than one activity when visiting the region.

Activity categories include: **Sports/active outdoor**-Scuba diving, go fishing, play golf, play other sports, other outdoor activities, and other exercise. **Social/sightseeing**-VFR, eat at restaurants, movies, pubs, clubs, discos, visit casinos, attend an organised sporting event, go shopping (for pleasure), general sightseeing, picnics/BBQs, ferry rides, tall ships, other tourist cruises, day trips, Other - : going to the beach, visit national/state parks, bush walking, rainforest walks, visit botanic/public gardens, go whale/dolphin watching, and visit farms, attend theatre, visit museums/art galleries, visit art/craft workshops/studios, attend festivals, fairs, cultural events, experience aboriginal art/craft and cultural displays, visit an aboriginal site/community, visit history/heritage buildings, sites or monuments, visit amusements/theme parks, visit wildlife parks/zoos/aquariums, go on guided tours or excursions, going to markets, tourist trains, visit industrial tourist attractions, visit wineries

| ACCOMMODATION – Domestic Overnight Visitors to City of Joondalup | *1998 to 2001 | *1999 to 2002 | *2000 to 2003 |
|---|---------------|---------------|---------------|
| Hotel, resort, motel or motor Inn | 6.6% | 11.3% | 9.5% |
| Rented house, apartment, flat or unit | 3.3% | 4.2% | 4.4% |
| Friends or relatives property | 76.4% | 71.3% | 77.3% |
| Other ^ | 14.1% | 13.5% | 8.4% |
| Total Overnight Visitors to City of Joondalup | 30,500 | 35,500 | 45,300 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data. ^ Other includes:

Guesthouses & Bed/Breakfast, Caravan Park, Backpackers, Education Institution and other. Percentages may not add up to 100% as visitors may have spent one or more nights in an alternative type of accommodation

| TRANSPORT – Domestic Overnight Visitors to City of Joondalup | *1998 to 2001 | *1999 to 2002 | *2000 to 2003 |
|---|---------------|---------------|---------------|
| Private or company vehicle | 83.0% | 82.5% | 76.2% |
| Other transport ^ | 17.4% | 17.7% | 24.9% |
| Total Overnight Visitors to City of Joondalup | 30,500 | 35,500 | 45,300 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a four year rolling average has been used to improve the reliability of the data. ^ Other transport includes:

Railway, Bus or coach, rented vehicle and other.

DOMESTIC DAYTRIPS TO THE CITY OF JOONDALUP

| GENERAL OVERVIEW City of Joondalup | 1998 to 1999* | 1999 to 2000* | 2000 to 2001* | 2001 to 2002* | 2002 to 2003* |
|---|---------------|---------------|---------------|---------------|---------------|
| Domestic Day Visitors | 452,500 | 452,000 | 373,000 | 340,000 | 365,500 |
| % of day visitors to WA who visited the City of Joondalup | 3.3% | 3.2% | 2.8% | 2.7% | 2.9% |

Source: Bureau of Tourism Research National Visitor Survey - * These figures have been provided as two year rolling average to increase their reliability due to small sample sizes.

DOMESTIC DAYTRIP PROFILE

| PURPOSE OF VISIT – Domestic Daytrip Visitors to City of Joondalup | 1998 to 1999* | 1999 to 2000* | 2000 to 2001* | 2001 to 2002* | 2002 to 2003* |
|--|---------------|---------------|---------------|---------------|---------------|
| Holiday or leisure | 40.8% | 43.5% | 43.6% | 46.6% | 55.8% |
| Visiting friends and relatives | 43.2% | 37.8% | 47.1% | 48.8% | 36.8% |
| Business | 8.5% | 11.0% | 4.7% | 2.4% | 2.2% |
| Other | 7.7% | 7.9% | 4.6% | 2.1% | 5.1% |
| Total Daytrip Visitors to City of Joondalup | 452,500 | 452,000 | 373,000 | 340,000 | 365,500 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a two year rolling average has been used to improve the reliability of the data. These figures do not add up to 100% as visitors may have more than one purpose for travel

| GENDER – Domestic Daytrip Visitors to City of Joondalup | 1998 to 1999* | 1999 to 2000* | 2000 to 2001* | 2001 to 2002* | 2002 to 2003* |
|--|---------------|---------------|---------------|---------------|---------------|
| Male | 45.5% | 41.8% | 49.5% | 49.6% | 41.0% |
| Female | 54.7% | 58.2% | 50.4% | 50.4% | 59.0% |
| Total Daytrip Visitors to City of Joondalup | 452,500 | 452,000 | 373,000 | 340,000 | 365,500 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a two year rolling average has been used to improve the reliability of the data.

Percentages may not add up to totals due to rounding

| AGE – Domestic Daytrip Visitors to City of Joondalup | | | | | |
|---|---------------|---------------|---------------|---------------|---------------|
| | 1998 to 1999* | 1999 to 2000* | 2000 to 2001* | 2001 to 2002* | 2002 to 2003* |
| 15 – 29 years old | 39.9% | 38.1% | 33.1% | 39.9% | 38.1% |
| 30 – 49 years old | 37.3% | 29.4% | 31.1% | 37.3% | 29.4% |
| 50 + years old | 22.8% | 32.5% | 36.0% | 22.8% | 32.5% |
| Total Daytrip Visitors to City of Joondalup | 373,000 | 340,000 | 365,500 | 373,000 | 340,000 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a two year rolling average has been used to improve the reliability of the data.

Percentages may not add up to totals due to rounding

| LEISURE ACTIVITIES UNDERTAKEN IN AUSTRALIA Domestic Daytrip Visitors to City of Joondalup | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|
| | 1998 to 1999* | 1999 to 2000* | 2000 to 2001* | 2001 to 2002* | 2002 to 2003* |
| Social and Other | 88.8% | 94.1% | 98.0% | 94.0% | 93.8% |
| Outdoor or nature activities | 17.2% | 16.9% | 14.2% | 18.8% | 26.1% |
| Sports or active outdoor activities | 7.5% | 8.4% | 9.1% | 13.7% | 13.8% |
| Local attractions or tourist activities | 10.9% | 9.8% | 5.5% | 9.0% | 9.2% |
| Arts, heritage or festival activities | 2.3% | 3.1% | 0.9% | 0.0% | 0.8% |
| Total Daytrip Visitors to City of Joondalup | 452,500 | 452,000 | 373,000 | 340,000 | 365,500 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a two year rolling average has been used to improve the reliability of the data.

Note: Numbers and percentages may not add up to total as international & domestic visitors may undertake more than one activity when visiting the region.

Activity categories include: **Sports/active outdoor**-Scuba diving, go fishing, play golf, play other sports, other outdoor activities, and other exercise. **Social/sightseeing**-VFR, eat at restaurants, movies, pubs, clubs, discos, visit casinos, attend an organised sporting event, go shopping (for pleasure), general sightseeing, picnics/BBQs, ferry rides, tall ships, other tourist cruises, day trips, Other- : going to the beach, visit national/state parks, bush walking, rainforest walks, visit botanic/public gardens, go whale/dolphin watching, and visit farms, attend theatre, visit museums/art galleries, visit art/craft workshops/studios, attend festivals, fairs, cultural events, experience aboriginal art/craft and cultural displays, visit an aboriginal site/community, visit history/heritage buildings, sites or monuments, visit amusements/theme parks, visit wildlife parks/zoos/aquariums, go on guided tours or excursions, going to markets, tourist trains, visit industrial tourist attractions, visit wineries

| TRANSPORT – Domestic Overnight Visitors to City of Joondalup | | | | | |
|---|---------------|---------------|---------------|---------------|---------------|
| | 1998 to 1999* | 1999 to 2000* | 2000 to 2001* | 2001 to 2002* | 2002 to 2003* |
| Private or company vehicle | 94.7% | 94.0% | 95.4% | 94.9% | 95.2% |
| Other transport ^ | 5.4% | 5.9% | 4.3% | 5.0% | 4.8% |
| Total Overnight Visitors to City of Joondalup | 452,500 | 452,000 | 373,000 | 340,000 | 365,500 |

Source: Bureau of Tourism Research National Visitor Survey

*Due to small sample sizes a two year rolling average has been used to improve the reliability of the data.

^ Other transport includes: Railway, Bus or coach, rented vehicle and other.

A vital influence on Joondalup's tourist industry is its seasonality, because a big proportion of visitors come because of water-based activities and the City's coastal attractions. Therefore, weather has an effect on visitor numbers and their distribution (peaks and troughs).

State Analysis

Western Australia has positioned and branded itself as the world's "natural choice – touched by nature". TWA has chosen to promote the state's unique nature-based tourism experiences to identified target segments. The strategy is outlined in *Pathways Forward — Strategic Plan 2003-08* (See Appendix 14). Although it has recently changed of the tourism slogan to *The Real Thing*, the focus remains on natural icons, sustainability and partnerships with industry and local government.

As such, the TWA strategy presents Joondalup with a number of opportunities to contribute to the state's effort and grow its tourism.

Specifically, Joondalup has the potential to deliver for its community and the state in the following areas as specified in the *Pathways Forward* strategy objectives.

Objective 1 (from Pathways Forward)

- Maximise business tourism
- Grow and diversify the events calendar.

Objective 2 (from Pathways Forward)

- Develop the nature-based tourism sector
- Initiate product-focused partnerships
- Develop iconic events
- Use events to support and strengthen the recognition of WA iconic experiences.

Objective 5 (from Pathways Forward)

- Develop new tourism product segments to meet market needs (for example, products that focus on Joondalup's indigenous and cultural heritage)
- Extend tourism products (such as those that can take advantage of the City's education and health campuses).

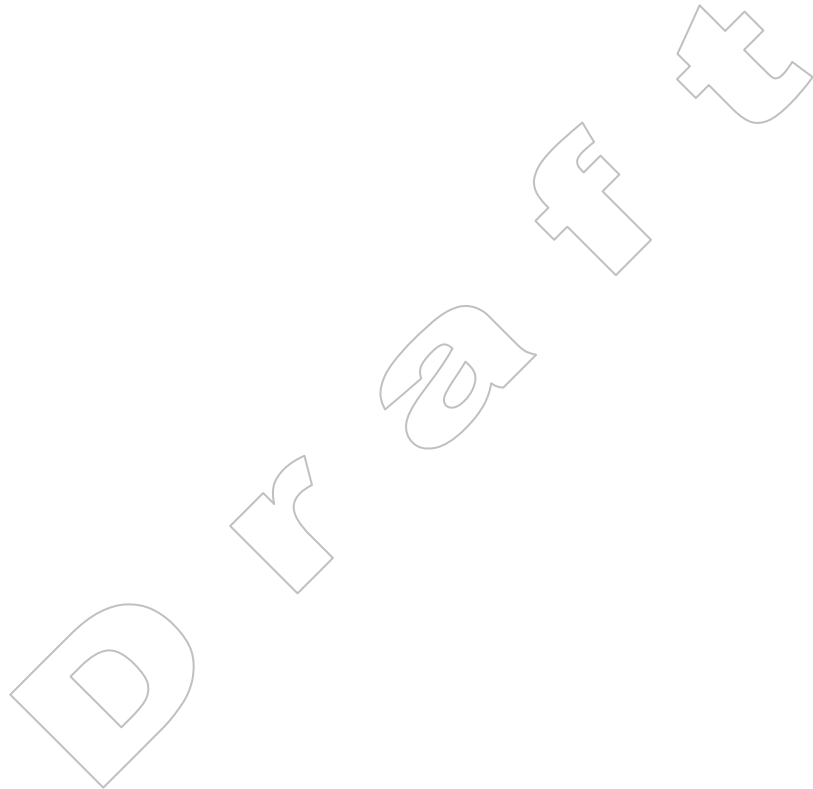
Western Australia's tourism industry is a major economic and social contributor to the state and is forecast to grow at an annual average of 4.6 per cent. The opportunity exists for Joondalup in the context of its market potential to achieve:

- more jobs for its residents
- increased profitability for a wide range of businesses, and a resultant increase in business value
- greater awareness of the social and **economic** value of the natural assets (e.g. parks, areas zoned as bush forever) to the community as a result of their tourist appeal
- greater social and economic contribution from tourists to community facilities
- better community facilities that tourists visit and experience

- better use of natural assets, such as parks used by tourists.

The challenge for the City of Joondalup is not only to attract more visitors, but to develop infrastructure and services that will increase visitor expenditure in the City.

Because it has under-utilised and under-developed attractions, Joondalup should be able to grow its tourism industry faster than the State or Perth region average growth rates.



Appendix 5 - Situational Analysis

Existing Tourism Infrastructure

An initial, superficial look at the City of Joondalup region suggests that it does not have a tourism industry or tourism infrastructure; that it is a residential area — a dormitory in the greater Perth metropolitan region.

Exceptions that come to mind include Hillarys Boat Harbour, Joondalup Resort and Golf Course and The Aquarium of Western Australia (AQWA).

However, a closer look at the City shows there are a number of businesses that are aware of their tourism markets and have positioned themselves to develop tourism.

For example, the Sunset Coast Visitor Guide, a publication that promotes tourist venues, events and activities from Yanchep south to Cottesloe, features a number of Joondalup's businesses that obviously are chasing the tourist dollar. These businesses are shown on a map from the guide reproduced on the next page.

Analysis reveals that the City of Joondalup has existing tourism infrastructure and services. While much of it primarily serves residents, it does have tourism relevance.



This map from the Sunset Coast Visitor Guide illustrates that a number of businesses in the City of Joondalup recognise they are part of the City's tourism infrastructure.

Transport

Joondalup is well served by transport connections, the result of its planning as a satellite city.

It includes a road network dominated by Mitchell Freeway and Marmion Avenue on the north-south axis and numerous access roads from suburbs to the east. The northern rail service connects to the City of Perth and beyond. All of its major transport infrastructure, including bus services, is well maintained.

Parking facilities and capacity at existing attractions and public amenities are generally sufficient, with the exception of Hillarys Boat Harbour at peak seasonal times.

Roads and parking are critical to tourism, with more than 90 per cent of visitors being self-drive¹². However, in the context of growing sustainable tourism/visitation, it is noted that there is currently a lack of convenient public transport linkages from the rail and bus services to the current recreational/tourist precincts/nodes or the proposed tourism development zones. Timetables are also not ideal. However, there is currently not likely to be sufficient demand for improved bus services.

The current Beach Bus schedule and routes is an opportunity for development.

Accommodation

Joondalup does not have a significant pool of short-stay beds to drive tourism. The supply includes:

| | Rooms | Beds |
|--|---------|------------|
| • Joondalup Resort | 90 | 200 |
| • Hillarys Boat Harbour | 44 | 150 |
| • Sorrento Beach Resort | 80 | 220 |
| • Burns Beach Sunset Holiday and Leisure Village | 70 | 6 |
| • Cherokee Village Tourist Park | 208 | 22 |
| • Various Bed and Breakfast operations (estimated) | | 40 |
| • Ern Halliday Camp (DSR) | 6 dorms | 186 |
| Total | | 824 |

Some short-stay accommodation is available in City Centre apartments and in residential-based bed and breakfast operations.

By comparison, the adjacent City of Stirling has approximately 2,500 short-stay beds, with significantly more proposed. The focal point for proposed development is Scarborough Beach.

¹² TWA Research, July 2004

Most noticeable in Joondalup is the absence of short-stay accommodation in the form of a hotel/motel or apartment complex in the City Centre. It appears that any demand for beds by City Centre visitors is being met by Perth City and Scarborough.

This TDP examines carefully the issue of accommodation infrastructure in Joondalup in the context of development proposals in adjacent local authorities and the pressures for ocean front development.

While opportunities exist and demand is strong, the TDP recommends environmentally sensitive developments restricted to Hillarys, Ocean Reef and the City Centre.

Attractions — Built and Natural

Built Attractions

Joondalup's current built attractions for tourists include:

- Hillarys Boat Harbour, including The Aquarium of Western Australia (AQWA), the Rottnest Ferry Terminal, food and liquor, retail (gift, recreational), a safe beach, boating facilities, short-stay apartments, The Great Escape.
- Joondalup Resort and Golf Course
- Arena Joondalup
- Beach facilities at Burns Beach, Ocean Reef, Mullaloo, Pinnaroo Point, Whitfords, Hillarys and Sorrento
- Learning City Precinct
- Whitford City, Warwick and Lakeside Joondalup shopping centres.

While there are other built facilities associated with natural attractions (the coastal bike and walk trail, Neil Hawkins Park), those mentioned above are the only ones currently attracting any tourist activity of consequence.

The relatively small number of built attractions is consistent with the predominant role of Joondalup as a residential region and the lack of specific strategy/policy to develop tourism as a driver of social and economic benefits.

Hillarys Boat Harbour is, in effect, the only **planned** tourism infrastructure in the City apart from Joondalup Resort and Golf Course.

Natural Attractions

Joondalup has a significant group of natural attractions/activities, some of which currently attract tourists and others that offer potential for a range of specific markets.

The dominant natural attraction/activities include:

- the beaches, ocean (Marmion Marine Park) and coastal reserve
- Yellagonga Regional Park
- Pinnaroo Valley Memorial Park/Craigie Open Space/Warrandyte Reserve
- water skiing area (Whitford Beach)
- whale watching
- diving
- offshore fishing.

Only the marine environment and beaches attract a significant number of visitors. In 2002-03, CALM reported **1,442,670 visits to the Marmion Marine Park**.

Colmar Brunton¹³ estimates 55,000 visits to the Yaberoo-Badjara Heritage trail and 61,000 visits to Perry's Paddock/Beenyup Park, with 83 per cent living locally.

CALM estimates Yellagonga Regional Park received 193,000 visits in 2001, with between 83 per cent and 93 per cent living locally.

Joondalup's natural features can be broadly identified as being in three of what this TDP has defined as tourism development zones.

These zones will remain a major focus for local recreation and education, with tourism an incremental factor. Currently, however, they have few facilities or services that appeal to tourists and raise revenue.

The coastal zone will continue to be the primary opportunity and the sustainable management challenge. Currently, going to the beach is the second most popular activity for international visitors, with 58 per cent going to the beach.

Nineteen per cent of domestic visitors go to the beach, their fifth ranked activity.

The potential for tourism in Joondalup can be seen from the match of its assets to the activities of Perth region's tourists.

Top Five Leisure Activities — International Visitors

Note: These activities were not necessarily undertaken in the Perth region, but may have been undertaken while in Perth or other destinations in Australia.

The top five specific activities for international visitors to the region are:

¹³ Colmar Brunton 2001 Visitor Survey

| Top Five Leisure Activities | 2002 International Visitors | per cent total of International Visitors |
|-------------------------------|-----------------------------|--|
| 1. Shopping (for pleasure) | 428,2001 | 79 |
| 2. Go to the beach | 317,100 | 58 |
| 3. Visit national/state parks | 310,100 | 57 |
| 4. VFR | 294,800 | 54 |
| 5. Go to the markets | 273,300 | 50 |

Source: Bureau of Tourism Research (IVS)

Note: Numbers and percentages may not add up to total as international visitors may undertake more than one activity when visiting the region.

Top Five Leisure Activities — Domestic Visitors

Note: As with international visitors, the listed activities may have been undertaken in Perth or other regions.

The top five specific activities for domestic visitors to the region are:

| Top Five Leisure Activities | 2002 Domestic Visitors | per cent Total of Domestic Visitors |
|-----------------------------|------------------------|-------------------------------------|
| 1. VFR | 1,459,000 | 44 |
| 2. Eat out/restaurants | 1,428,000 | 43 |
| 3. Shopping (for pleasure) | 983,000 | 29 |
| 4. General sightseeing | 793,000 | 24 |
| 5. Go to the beach | 649,000 | 19 |

Source: Bureau of Tourism Research (NVS)

Note: Numbers and percentages may not add up to total as domestic visitors may undertake more than one activity when visiting the region

The Joondalup coast presents significant opportunities for increased tourism despite the fact that:

- it does not have a major surf beach (such as Scarborough)
- it does not have a mix of beach and entertainment (such as Cottesloe), and
- much of its coast/beach is rocky and has inshore reef.

Cultural

The City of Joondalup recently completed a cultural mapping study and identified its cultural/heritage assets.

A number of cultural activities and heritage resources offer potential for tourism and a number of them may rely on tourists for their sustainability and viability.

Cultural factors and heritage resources that offer most tourism potential include:

Population

Joondalup has a significant migrant population including:

- the British/Irish community — 18.1 per cent of Joondalup's population (2001) was born in Britain (27,044) and 1 per cent in Ireland (1,555)
- New Zealand — 2.9 per cent (4,393)
- South African — 1.6 per cent (2,433).

The tourism opportunity from this population mix arises from the strength of VFR (visiting friends and relatives) as a motivating factor for tourist visits.

Each of the above countries of origin are major tourist markets for WA.

VFR is the top tourist activity for domestic visitors, 44 per cent visit friends and relatives and 51 per cent stay with friends or relatives. Fifty four per cent of international visitors visit friends and relatives and 35 per cent stay with friends or relatives.

While the cultural mapping process has identified what they see as a British pub culture developing in Joondalup, the City does not have a multi-cultural tourism positioning like, say, Fremantle or Northbridge.

The other major population/cultural strength and opportunity come from the education sector, where Edith Cowan University has overseas students, the majority of whom come from South East Asia.

The student population would be the basis of significant visitation of families to attend graduation ceremonies, assist in student settlement and holiday with students.

Education-driven tourism represents a significant opportunity.

Arts/Contemporary Culture

Joondalup does not currently have a cultural industry or cultural activities that have significant appeal to tourists/visitors.

This is not to suggest that Joondalup does not have a developing strong cultural/arts community network, activities and facilities. The cultural mapping process has identified a range of these and this report identifies the following as currently having a degree of tourist/visitor support, but which as **events** or **facilities**, also afford greater potential:

- Joondalup Festival
- The Invitation Art Award

- Public Art
- Arena Joondalup.

Joondalup does not have museum facilities or a major performing arts facility.

Retail and Hospitality

Retail and hospitality infrastructure and its mix is a critical factor in attracting tourists and in generating economic benefit.

Joondalup currently has some significant, but limited, facilities in this regard. Prominent facilities include:

- Hillarys Boat Harbour, including Sorrento Quay
- Whitfords City Shopping Centre
- Joondalup Resort
- Lakeside Joondalup Shopping Centre
- Warwick Shopping Centre
- Hillarys Harbour Resort
- Sorrento Beach Resort.

Hillarys Boat Harbour is a significant retail and hospitality precinct in the context of Perth's tourist facilities and a major strength for Joondalup.

However, those areas which this TDP defines as the City tourism development zone and the Wetlands tourism development zone (refer to Appendix 8) have limited or no retail or hospitality (food and beverage) operations focused on or appealing to tourists.

Existing Marketing

In Joondalup, as in most local government areas, the tourism marketing responsibility falls on:

- individual businesses
- a sub-regional marketing co-operative (not for profit), Sunset Coast Tourism Association Inc.
- a regional marketing co-operative (not for profit), Experience Perth (a new initiative in 2004)
- City of Joondalup
- Perth Convention Bureau
- Tourism Western Australia (formerly Western Australian Tourism Commission)
- And, to a much lesser degree, organisations such as CALM.

Industry consultation evidences that **the City of Joondalup is not seen by the tourism industry as a tourist destination and that the City does not have a tourism positioning within the tourism industry.**

This is not unexpected or unusual for a local government area. In the Perth tourism region, for instance, it could be argued that only Perth City, Fremantle, Swan Valley and Northbridge have created brand awareness in both domestic and international markets.

However, the name Joondalup has some recognition as a result of the long-term quality marketing and positioning of Joondalup Resort and Golf Course in the business tourism sector and Asian leisure sector.

Hillarys Boat Harbour/Sorrento Quays/Sorrento Beach Resort, AQWA and Whitford City Shopping Centre have strong profiles in the tourism industry and certain consumer markets.

Individual businesses in Joondalup have positioned themselves in a wide range of market segments including:

- business (conferences, meetings etc)
- education
- seniors
- coach
- day trip.

Individual Businesses

As can be expected, the degree of tourism marketing varies, dependant on the size of the business and its reliance on tourism markets.

Currently, the marketing activity by businesses is diverse, including:

- the employment of full time marketing staff
- advertising in tourism consumer and trade publications
- a web presence with tourism links
- the production of tourist promotional materials, e.g. brochures and their distribution
- attendance at tourism trade and consumer promotions.

However, less than 40 businesses operating in Joondalup buy advertising space in the major consumer tourism publications — Perth Region Holiday brochure, Sunset Coast Visitor Guide.

Sunset Coast Tourism

The Sunset Coast Tourism Association has been under-resourced for a number of years and as a consequence has not been able to establish its brand effectively. However, it is a valuable network and is currently providing a marketing tool in its visitor guide, as well as providing sub-regional representation and industry promotional activities. It has also embarked on important research in co-operation with short-stay accommodation operators.

The period 2004-05 will be challenging for the association as it establishes its role in the context of the newly-formed *Experience Perth* organisation. This is a debate for industry that the City will need to monitor.

Experience Perth

Experience Perth is a new regional body established under Tourism Western Australia's new zone strategy.

It is jointly financed by Tourism Western Australia and industry members. It has sole responsibility for the intrastate marketing of the Perth region's tourism industry and joint responsibility with TWA to promote in interstate and international markets.

***Experience Perth* is an important marketing organisation for Joondalup and the Sunset Coast. The intrastate market (especially day visitors) is the first priority market for Joondalup and is very competitive within this Perth region. Joondalup will need to create new strategies and tactics to maintain and grow its market share.**

Tourism Western Australia (TWA)

TWA is the state government agency responsible for promoting Western Australia's tourism industry.

It has a five-year Strategic Plan — *Pathways Forward* — and is intent on co-operatively promoting the state's tourism by marketing and the facilitation of tourism infrastructure.

Its strategy has a focus on the state's natural attractions (icons) with a vision to make Western Australia *The Real Thing*.

Joondalup is currently a minor player within the Sunset Coast destination area and has not effectively engaged with TWA.

The Eventscorp division of TWA also does not have any current involvement with Joondalup-based events, beyond the Perth Criterium Series (Cycling).

The Department Of Conservation and Land Management (CALM)

CALM has a tourism marketing strategy and a considerable amount of Joondalup's tourism potential is bound up in Marmion Marine Park and Yellagonga Regional Park, assets managed by CALM.

Neither of these parks is currently a focus of CALM tourism marketing, which has significant impact with the tourism trade and consumers.

There has been co-operation between CALM and City administration over recreational and educational development at both Yellagonga and the coastal dual use path. The relationship between CALM and the City will be critical to future tourism development.

CALM is integrally involved in two of the three identified tourism development zones (coastal and wetlands).

Perth Convention Bureau (PCB)

The Perth Convention Bureau is responsible for promoting WA in the business tourism sector (meetings, incentives, conferences and exhibitions). It is funded by its members and TWA.

Currently in Joondalup, this market, and a relationship with the PCB, is important and active for Joondalup Resort, AQWA and Edith Cowan University. However, only the resort is hosting significant business. The City Centre and ECU do not have the facilities to host this business, yet ECU has driven the attraction of conferences to WA and there is a future opportunity that should also include the Health (Hospital) sector.

The opportunity is even greater now with the opening of the Perth Convention & Exhibition Centre.

Special Note: Business tourism is important for the development of Joondalup as a Learning City.

City of Joondalup

The City has played a role in the marketing of tourism. Activities have included:

- funding support of Sunset Coast Tourism Association
- creation of a tourism web presence
- purchase of advertising space in the Sunset Coast Visitor Guide
- staging and promotion of the Joondalup Festival, Perth Criterium Series and other events
- tourism in City promotional brochures.

Joondalup's current direct spending on tourism marketing is estimated at \$50,000 to \$80,000. However, the contribution to the marketing of the City as a tourist destination has not been strategic and has not maximised the potential for economic and social benefits.

Summary

While a few private businesses have strategically promoted themselves to tourism markets, Joondalup, as a region, has not positioned and promoted itself to tourism markets in any cohesive way.

Appendix 6 - Competitive Analysis

Perth Region and Joondalup

As with any tourism destination/area, Joondalup has a range of competitors. Competitors often change when different market sectors are considered. Sometimes the competitors can be allies, particularly in co-operative marketing.

For instance, in the Perth day visitor market, Joondalup (and particularly Hillarys) competes with Fremantle, the Swan Valley, Scarborough (City of Stirling) and Yanchep (City of Wanneroo). In other markets, such as the interstate or coach tour markets, Joondalup has co-operative allies in the Swan Valley and Yanchep.

Joondalup's competitive strengths and weaknesses must be assessed, both in critical specific market sectors and in a general sense.

Joondalup's competitive strengths include its:

- coastline/beaches and dune environments and the coastal walk/cycle path
- Marmion Marine Park (fishing, diving, sailing, whale watching, etc)
- Hillarys Boat Harbour
- Joondalup Resort and Golf Course
- immigrant population
- education (including tertiary) and medical precinct
- rail access
- proximity to Perth
- Rottnest connection (ferry terminal)
- water skiing zone
- Yellagonga Regional Park
- City Centre's close proximity to Yellagonga Regional Park and Neil Hawkins Park
- Ocean Reef development
- quality of infrastructure, especially outdoor recreation facilities
- modern shopping centres and other retail facilities
- cleanliness of the City
- Joondalup festival and other events.

Joondalup's competitive weaknesses include:

- shortage of short-stay accommodation
- lack of choice in available accommodation types
- low standard of hospitality (restaurants, cafes) services on the coast (excepting Hillarys)
- poor public transport connections to coast/beaches from existing services and infrastructure
- embryonic entertainment/hospitality sector in the City Centre
- absence of performing arts or conference facility
- absence of an iconic beach (as opposed to, for example, Cottesloe, Scarborough, City Beach)
- low market awareness of its major natural attractions
- low brand awareness for Sunset Coast (the same applies for Fun Coast, south of Fremantle)
- a decline in some aspects of Hillarys appearance.

In the absence of specific market research, the consultants consulted with tourism industry representatives and reached the conclusion that **Joondalup is not positioned as a tourist destination.**

However, some attractions within Joondalup's local government boundaries have strong tourism market positioning, particularly Hillarys Boat Harbour (Sorrento Quays), Joondalup Resort and Golf Course, Sorrento Beach Resort and AQWA.

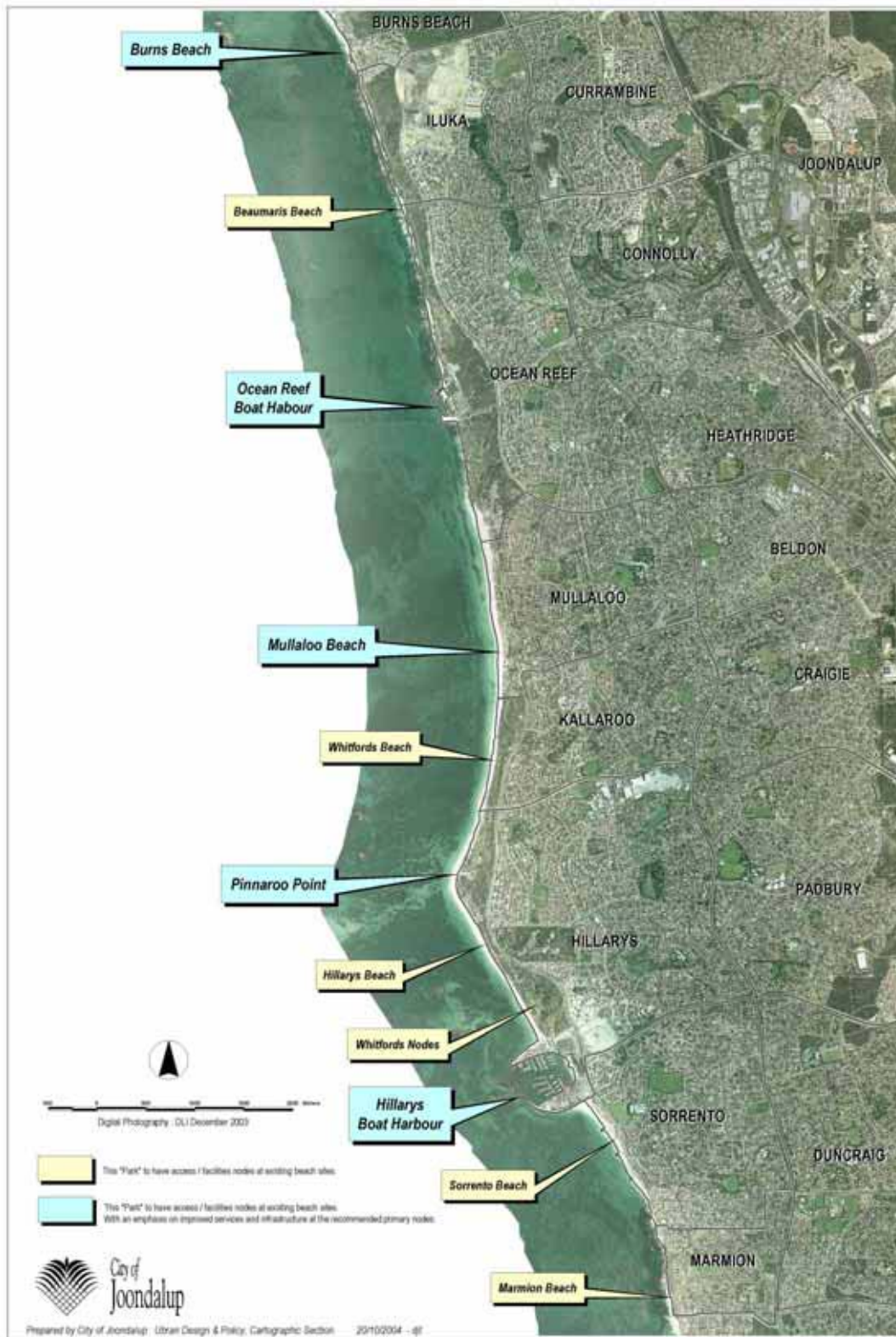
Appendix 7 - Map of Joondalup's Existing Sites of Interest



Appendix 8 - Map of Joondalup Tourism Development Zones



Appendix 9 - Map of Proposed Joondalup Coastal Park Development Nodes




Appendix 10 - Ecotourism Accreditation

Ecotourism Australia - Eco Certification

Page 1 of 5


Welcome to Ecotourism Australia
SEARCH FOR MEMBERS
SEARCH FOR PRODUCTS





Eco Certification Program

The 'eco-tick' assurance for:
Operators, Protected Area Managers,
Local Communities & Travellers

Get a Eco Certification Program Application Document:

 [Online Application Form](#)

 [Printable Application Form](#)
Format: pdf 5.0

 **View:**
[Eco Certification Program Application Document - Third Edition](#)
Filesize: 3375Kb
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This document is Copyright. It is prohibited to print, download or reproduce this document in any way. This document is for READ INFORMATION ONLY. An authenticated original document must be ordered from Ecotourism Australia to commence an application for ECO Certification.

The 'eco-tick' assurance for:

✓ Operators
✓ Local Communities

✓ Protected Area Managers
✓ Travellers

What is the Eco Certification Program?

The Eco Certification Program is a world first. It has been developed by industry for industry, addressing the need to identify genuine ecotourism and nature tourism operators in Australia. the Eco Certification Program is now being exported to the rest of the world as the International Ecotourism Standard.

Ecotourism and nature tourism certification provide industry, protected area managers, local communities and travellers with an assurance that a certified product is backed by a commitment to best practice ecological sustainability, natural area management and the provision of quality ecotourism experiences.

What are Nature Tourism and Ecotourism?

Under the Eco Certification Program, **Nature Tourism** is defined as:

Ecologically sustainable tourism with a primary focus on experiencing natural areas.

Under the Eco Certification Program, **Ecotourism** is defined as:

Ecologically sustainable tourism with a primary focus on experiencing natural areas that fosters environmental and cultural understanding, appreciation and conservation.

Membership

Ecotourism Australia memberships designed to meet the needs of industry sectors and individuals involve ecotourism. Learn more

Menu

- [Main](#)
- [About Ecotourism Australia](#)
- [Board Member's P](#)
- [International Ecot Standard](#)
- [Eco Certification Program](#)
- [EcoGuide Australia Program](#)
- [Membership](#)
- Features**
- [National Conference 2004](#)
- [Unesco and Ecotourism Australia Memorandum of Understanding](#)
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12th National Conference 2004

Ecotourism Australia presents the 12th National Conference Blue Mountains, 10 - 12 November 2004

Sponsored by

http://www.ecotourism.org.au/eco_certification.asp

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Ecotourism Australia - Eco Certification

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What can be certified under the Eco Certification Program?

The Eco Certification Program accredits products not companies. Three types of nature tourism or ecotourism product may be accredited:

**Tours
Attractions
Accommodation**

Many operators manage more than one type of product

Eligibility for accreditation is based upon the following principles:



| Eco Certification Program Principles | |  |  |  |
|--------------------------------------|---|---|---|---|
| 1. | focuses on personally experiencing nature in ways that lead to greater understanding and appreciation | ✓ | ✓ | ✓ |
| 2. | integrates opportunities to understand nature into each experience | - | ✓ | ✓ |
| 3. | represents best practice for ecologically sustainable tourism | ✓ | ✓ | ✓ |
| 4. | positively contributes to the ongoing conservation of natural areas | - | ✓ | ✓ |
| 5. | provides constructive ongoing contributions to local communities | - | ✓ | ✓ |
| 6. | is sensitive to, interprets and involves different cultures, particularly indigenous culture | - | ✓ | ✓ |
| 7. | consistently meets client expectations | ✓ | ✓ | ✓ |
| 8. | marketing is accurate and leads to realistic expectations. | ✓ | ✓ | ✓ |

Each of the above principles is reflected in specific

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Ecotourism Australia - Eco Certification

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assessment criteria that establish two categories of certification: Nature Tourism and Ecotourism. Ecotourism certification has two levels Ecotourism and Advanced Ecotourism. Each level of certification incorporates a more stringent set of assessment criteria. The criteria for Advanced Ecotourism also encourage and reward innovative best practice that exceeds the Eco Certification Program standards.

What are the benefits of Certification?

Nature tourism and ecotourism certification provides benefits to operators, managers, communities and travellers:

- criteria to assist operators plan and develop their nature tourism and/or ecotourism product
- a guide to assist operators implement the principles of ecologically sustainable development
- an opportunity for operators to continually improve performance to a standard recognised as best practice
- a recognised logo for operators to use in their marketing material
- a recognised means for protected area managers and travellers to identify genuine nature tourism and ecotourism operators
- a tool for protected area managers to encourage improved practices that lead to less environmental impact
- a tool to help local communities determine a mix of tourism activities that maximises benefits and minimises negative impacts
- an essential educational and information tool.
- The Eco Certification Program includes Membership of Ecotourism Australia at the applicable level based of gross turnover.

Who operates the Eco Certification Program?

The Eco Certification Program is an initiative of Ecotourism Australia, which has established an Eco Certification Program Management Committee to provide policy and management support for the program. The Management Committee oversees an Audit and an Assessment Panel, which are Chaired by a person independent of Ecotourism Australia.

The Eco Certification Program operates as a self-funding, not for profit program. The Ecotourism Australia management team coordinates the day to day activities of the program and provides a help desk and mentoring program for operators completing an application.

How are the Eco Certification Program products assessed?

When an application is received it is forwarded to an



Ecotourism Australia - Eco Certification

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independent trained Assessor who reviews and scores the application, and contacts referees and the operator for clarification. The Assessor's report on the application is considered by the Assessment Panel at a monthly meeting before a final decision is made on the applicable level of Certification.

The assessment process is normally completed within eight weeks depending on the complexity of the application and the extent of the background information provided. Applications which are incomplete, fail to clearly define the product for which accreditation is sought or are internally inconsistent will require further clarification by the Assessor and will take longer to process.

How do I apply for certification?

To apply for certification, operators need to purchase a copy of the application document at a cost of \$85 mailed, by completing the request form in the Ecotourism Australia brochure or at our website. Up to four ecotourism or nature tourism products may be included in one document.

On receiving the document, operators need at first to carefully define the product/s for which they are seeking certification. Matters to be addressed include the category (tour, accommodation or attraction), the activities undertaken and the inclusions. Then work through the self-assessment questions that apply to the products. At any time through this process operators are encouraged to contact the Eco Certification Program help desk to clarify any issues. Upon completion, return the document to Ecotourism Australia with the appropriate application and annual fees.

If the application is successful, the operator is eligible to display one of the Eco Certification Program logos next to their accredited product/s. Operators also receive a kit including a certificate, logos in electronic form and decals to assist in promoting their product as a genuine ecotourism or nature tourism experience. Certification is valid for three years, after which a new application has to be made. Annual renewals are payable each December.

How much will it cost?

The cost of obtaining the application document (GST and mail inclusive) is \$85. Application and annual fees (GST inclusive) are calculated according to the business's annual turnover:

| Annual Turnover | Once only Application and Assessment Fee: | Annual Fee: |
|------------------|---|-------------|
| \$0 to \$100,000 | \$200 | \$220 |
| \$100,001 to | \$260 | \$280 |

http://www.ecotourism.org.au/eco_certification.asp

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| | | |
|-----------------------------|-------|-------|
| \$250,000 | | |
| \$250,001 to \$1,000,000 | \$330 | \$460 |
| \$1,000,001 to \$5,000,000 | \$430 | \$680 |
| \$5,000,001 to \$10,000,000 | \$530 | \$840 |
| \$10,000,001 and Over | \$730 | \$940 |

Annual fees are charged on a pro-rata basis to correspond with the standardised renewal date in December. Operators should determine the quarter in which they are submitting their application, and add the appropriate amount to the application fee.

If an operator wishes to upgrade a product from Nature Tourism certification to Ecotourism certification, or from Ecotourism certification to Advanced Ecotourism certification, they must submit a new application with the appropriate application fee and annual fee.

How is the credibility of the program maintained?

Credibility with industry, communities and travellers is at the heart of the Eco Certification Program. This is maintained through:

- a rigorous assessment process including referees (one of whom must be a protected area manager)
- review and updating of criteria every three years to reflect emerging best practice
- feedback from customers of accredited operators
- audits of operators, including an on-site audit on the entire set of the Eco Certification Program criteria at some stage during the period of accreditation

[Back to top](#)

Contact Ecotourism Australia |

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Appendix 11 - Web Presence – Restaurants

Search Results - Western Australian Tourism Commission Page 1 of 2



westernaustralia.com
travel

- Holiday Experiences
- How to get here
- How to get around
- Events
- Holiday Specials
- Itineraries
- Travel Information
- Accommodation Search
- Tours Search
- Attractions Search
- Hire Search
- Industry

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Monday 25 Oct

[travel](#) | [destinations](#) | [industry](#) | [media](#) | [info centre](#) | [sign in](#)

[Home > Advanced Search > Search Results](#)

search results - restaurants

Total results returned = 2

- 1. Botanic Golf Gardens**
08 9405 1475
Botanic Golf Gardens features two unique mini golf courses nestled amongst five acres of magnificently landscaped gardens, to[more](#)
25 Drovers Place, Wanneroo, 6065
- 2. Aquila Estate**
08 9561 8166
85 Carabooda Road, Carabooda, 6033

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[Broct](#)
[Curre](#)
[Live I](#)

http://www.westernaustralia.com/en/Search/SearchResults.htm?SearchSource=subsearch... 25/10/2004

Appendix 12 - Web Presence – Hillarys Boat Harbour



westernaustralia.com

travel

Holiday Experiences

How to get here

How to get around

Events

Holiday Specials

Itineraries

Travel Information

Accommodation Search

Tours Search

Attractions Search

Hire Search

industry

UK specials

Europe specials

News

Product - Western Australian Tourism Commission

Page 1 of 2

home | sign in | contact us

Thursday 21 Oct

travel destinations industry media info centre sign in

Home > Advanced Search > Product

hillarys harbour resort



Hillarys Harbour Resort offers luxurious and affordable apartments as an alternative to hotel accommodation.

With a choice of one, two and three bedrooms, these modern apartments are within walking distance of all of Hillarys Boat Harbour's attractions, in fact they are on the doorstep.

Whether it be shopping, dining at a restaurant or cafe, or soaking up the sun on one of the many adjacent beaches, the apartments are the perfect place to stay.

Western Australia's new aquarium, AQWA (The Aquarium of Western Australia) is just a footstep away, with its giant underwater viewing platforms and fish feeding displays.

The harbour is also the place to catch a ferry to Rottnest Island, go whale watching, do a little beach or deep sea fishing, parasail or scuba dive.

Nearby waterslides, trampolines, mini-golf and fun park at The Great Escape is sure to keep the children amused.

All of this is just 20 minutes from Perth and located on the Sunset Coast.

You may decide to spend your day around the sparkling pool and heated spa, or in the sauna. Also within the pool area is a childrens pool, barbecue and seating.

When in any of the apartments, you will enjoy fully self-contained facilities, reverse cycle air-conditioning, free Foxtel, laundry with washer, dryer, iron and board. The kitchens are equipped with microwave, dishwasher, refrigerator, oven and hotplates, plus cutlery, crockery and utensils.

The main bedroom has its own en-suite, which includes Bath / Shower toilet, vanity and hairdryer. The second bedroom also has it's own en-suite.

Free undercover parking is also provided with-in the resort.

Being on the coast and facing West you will be delighted by the picturesque sunsets - we have it all.

[Enquiry](#)

★★★★★  

Address 68 Southside Drive, Hillarys, 6025

Phone 08 9262 7888

search

Enter

Advar

Search

useful

Maps

Links

Conti

Newt

Comp

ePos

Sign

Imag

Broct

Curre

Live t

adve

adve

adve

Toll Free Phone 1800 240 078

Fax 08 9262 7800

Email <http://www.westernaustralia.com/en/Search/product.htm?ID=9000162&click=email>

Web Page <http://www.westernaustralia.com/watc/Reports/CountClick.aspx?clickType=WEB&link=www.hillarysresort.com.au&productID=9000162>



Facilities BBQ Facilities, Child Pool, Conference/Convention Facilities, Marina Facilities, Non Smoking Establishment, Swimming Pool Outdoor, Public Telephone, Safety deposit box, Sauna, Spa

Disabled Access Wheelchair access to two apartments. Please enquire for further details upon booking.

Children Property located in Hillarys Marina, with an excellent children's beach, recreational fun park including water slides, and underwater Aquarium (AQWA).

Check-in Time 1400

Check-out Time 1000

Reception Hours 0800 to 1800 Sunday to Thursday.0800 to 1900 Friday and Saturday.0900 to 1800 Public Holidays.

Number of Rooms 44

Number of Floors 3

Convention Capacity 35

Convention Details If you are after a smaller, more intimate conference centre to comfortably accommodate 35 people then the facility at Hillarys Harbour Resort is ideal. The centre has every conceivable modern convenience to make your event smooth running success. Opposite the Resort, AQWA Function Centre can cater for larger groups while we can take care of the accommodation requirements.

Service Facilities Balcony, Bath, Blankets, Clock Radio, Cooking Facilities - FULL, Dishwasher, Ensuite, Facsimile/Modem point, Refrigerator, Hairdryer, Heating, In-house movies, Iron/Ironing board, Linen, Microwave oven, Non Smoking Room, Telephone, Rollaway Bed, Tea/Coffee making facilities, Television, Washing Machine, Window Open

Tariffs

| Item | Inclusions | Price |
|----------------|------------|----------------------|
| Accommodation | Room Only | \$152.00 to \$230.00 |
| Enquiry | | |



Appendix 13 - Web Presence – Department of Transport's Coast Cam



Jump To A Site Section

Marine Information

→ iMarine Coastal Data

[Home](#) > [iMarine](#) > [Coastal Data](#) > [Coast Cams](#) > [Live Cameras](#) > [Hillarys Boat Harbour](#)

Hillarys Boat Harbour

Hillarys Mon Oct 25 18:14:33 2004



Department for Planning and Infrastructure
Government of Western Australia

This image is supplied by Coastal ITIDES
© Department for Planning and Infrastructure
www.dpi.wa.gov.au

The image above is captured from a web cam located on the Harbour Manager's office at Hillarys Boat Harbour in Hillarys, Western Australia. It has a North Westerly field of view and updates automatically every minute.

[view wave chart](#)

Select a Camera

Select a Camera

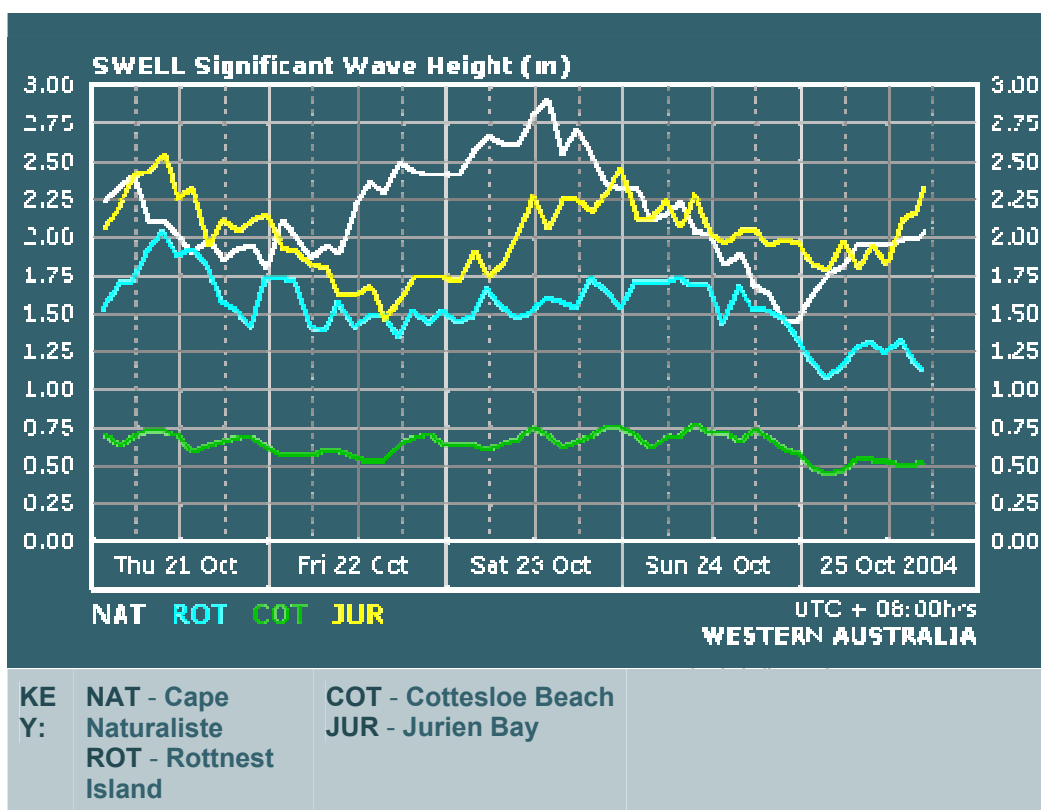
Select an Archive

Current Conditions*

| | |
|---------------------|-----------------|
| TEMP. (°C) | 20.8 |
| WIND DIR. | SSE |
| WIND SPEED | 11kn |
| SWELL (H) Cottesloe | 0.5m |
| SWELL (H) Rottnest | 1.3m |
| ITIDES | 0.75m @ 8:41 am |
| Fremantle | 0.79m @ 8:55 pm |

More information about local Conditions:

Select an Option



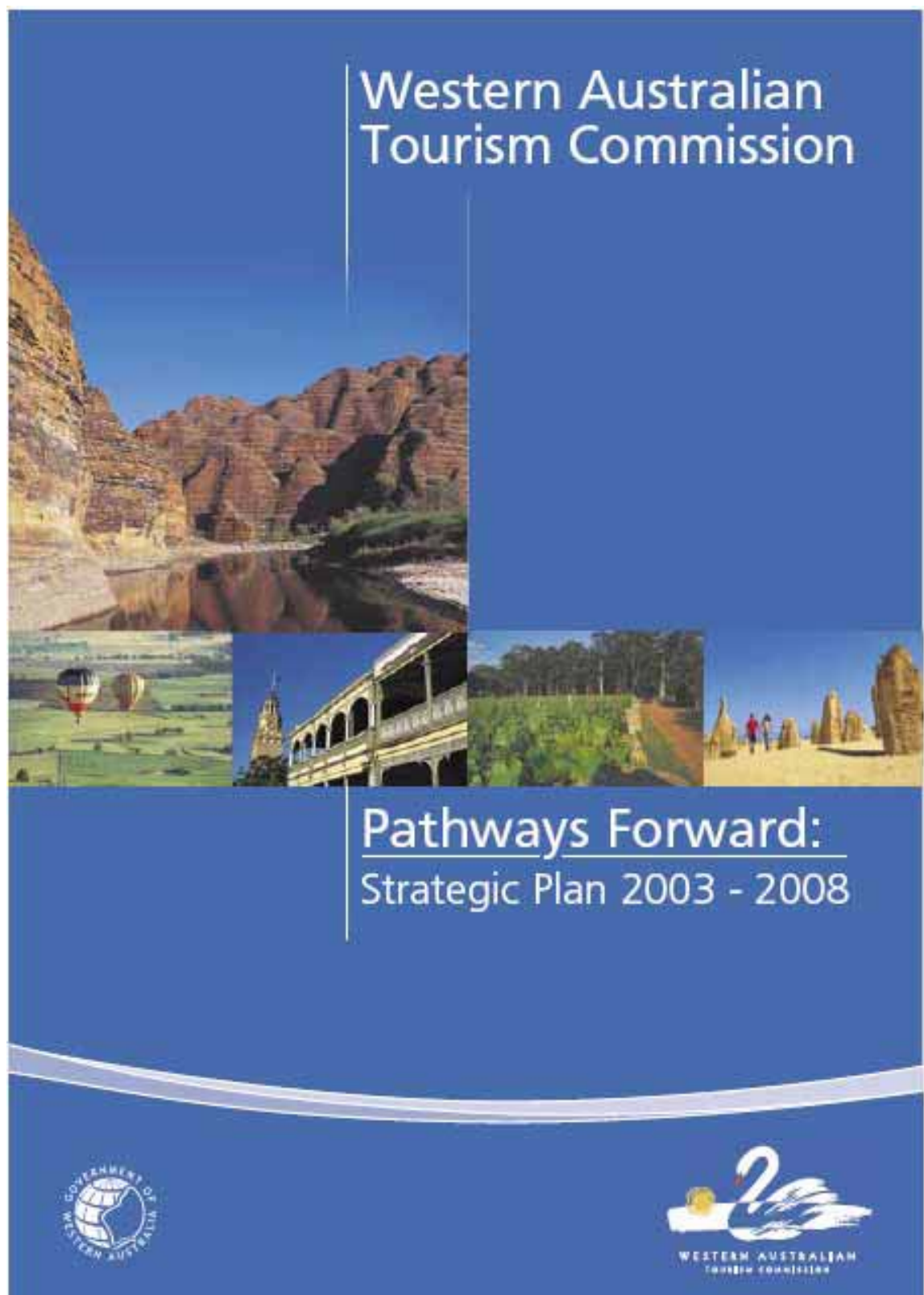
* The **Current Conditions** temperature, wind direction and wind speed readings are taken from the [Swanbourne BOM Weather Station](#).

New - [Directional wave information for Rottnest](#)

The [near real-time wave data](#) is downloaded from recording sites and graphics created for the web using software developed by Tremarfon Pty Ltd.

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Western Australia – The World's Natural Choice

The Corporate Vision of the Western Australian Tourism Commission is to make Western Australia the world's natural choice. In striving for this Vision, we will position tourism to take advantage of the unique experiences offered by this State, so that tourists naturally choose Western Australia.

Our Mission is to accelerate the sustainable growth of tourism for the long term benefit of the State. We are aiming for sustainable performance to ensure a continuing competitive and commercial return for the tourism industry, as well as other sectors of the economy which benefit from tourism. At all times, we will pay attention to the potential economic, social and environmental impacts of our actions.

In an independent review of tourism in Western Australia conducted in 2002 (Partnership 21 Review), it became clear that the tourism industry was seeking and expected leadership from the Western Australian Tourism Commission. This Strategic Plan is part of the Commission's commitment to providing that leadership.

The Commission has already taken strong action by developing a new regional strategy that will significantly improve and streamline the marketing of tourism in Western Australia through five distinct tourism regions. Tourism is being developed and promoted around key iconic experiences, which will boost the recognition of our State and provide a focal point in each of the regions.

The Commission is also refreshing the State's tourism brand. This process, which will include market testing, is scheduled for completion by the end of 2003.

We have identified six objectives that are critical to achieving our Vision and Mission. These objectives will be realised through the strategies outlined in this Plan. Our objectives are ambitious and require that we continue taking calculated risks to advance tourism in this State. Additional information on strategies specifically covering Industry Development, Marketing and Communication, Event and Business Tourism and the New Concept for State Tourism: A Zone Strategy for Western Australia can be viewed at www.tourism.wa.gov.au



Vision

Make Western Australia the world's natural choice

2

Western Australian Tourism Commission
Strategic Plan 2003 - 2008

The Path to Success

We will achieve our Vision by working to meet six objectives.

Together with Industry and other stakeholders we will:

1. Grow Western Australian tourism faster than the national average

We will accelerate the sustainable growth of tourism in Western Australia at a rate that is faster than the national average.

This will result in increased visitor expenditure and increased employment opportunities for Western Australians.

2. Increase recognition of our iconic tourism experiences

We will develop and market our iconic tourism experiences, such as the Bungle Bungle Range, Southern forests and interaction with dolphins in the wild, so that they are recognised and favoured nationally and globally. This will result in increased visitation and contribute positively to our economy.

3. Enhance visitor experiences in Western Australia

Our visitors will not only experience Western Australia, they will have memorable and high quality experiences and become our major advocates. This will be reflected in increased awareness, higher visitation and repeat visitation.

4. Grow regional tourism through partnerships and local empowerment

We will work with the regions so that they have the autonomy, skills and information for fast and relevant decision making. This will result in greater regional visitation, increased revenue, and higher levels of investment and reinvestment. Partnerships with regional tourism organisations, local governments, visitor centres, regional development commissions, and other government agencies will be key in achieving this objective.



5. Make Western Australia a natural choice for tourism investment

We will strive to ensure that Western Australia's advantages are better understood within the investment marketplace. This will result in an increase in demand for investment opportunities and increased overall investment in Western Australian tourism products and infrastructure.

6. Achieve recognition for the tourism industry as a leading economic contributor to the State

We will work in collaboration with our stakeholders to ensure that the economic contribution of tourism is recognised. This will result in broad based community support and the Western Australian Tourism Commission becoming an integral part of government planning and decision making.



The Western Australian Tourism Commission will employ strategies to meet each of the six objectives. While each strategy predominantly addresses one objective, collectively they contribute towards the achievement of all objectives.

| Objective 1: Grow Western Australian tourism faster than the national average | | | | |
|--|---|--|--|-------------|
| No. | Strategy | Strategy Description | Lead Responsibility | Timing |
| 1.1 | Drive visitation during shoulder seasons by undertaking targeted cooperative retail advertising campaigns, with an increasing emphasis on one-to-one marketing. | Work with influential distribution partners including airlines, tour operators and the Australian Tourist Commission on targeted collaborative advertising and one-to-one marketing campaigns to attract visitors before and after the traditional peak times. | Marketing & Communication | 2003 - 2008 |
| 1.2 | Gather and communicate research intelligence to the tourism industry. | Empower the industry by providing ready access to the latest market research. | Marketing & Communication | 2003 - 2008 |
| 1.3 | Utilise traditional and online marketing media to increase consumer access to destination and tourism product information. | Ensure destination and tourism product information is freely available to all prospective visitors, both while they are planning a holiday in WA and during their travels throughout the State, via quality brochures and on-line information. | Marketing & Communication | 2003 - 2008 |
| 1.4 | Maximise joint business opportunities with local, state and federal government. | Work with other government agencies to maximise exposure of Western Australia and to encourage business support for tourism and tourism initiatives in WA. | Marketing & Communication | 2003 - 2008 |
| 1.5 | Use major Perth and regional events to leverage tourism opportunities. | Identify and provide opportunities for event participants and potential visitors/spectators to experience the State before and/or after the event. | Marketing & Communication | 2003 - 2008 |
| 1.6 | Use the international student market to increase tourism opportunities. | Represent WA and its vast tourism opportunities in a consistent and attractive manner to prospective students. Make sure tourism information is easily available to them, and potential visitors, such as family and friends. | Marketing & Communication | 2003 - 2008 |
| 1.7 | Integrate tourism into overall planning, policy and development priorities of Western Australia. | Ensure that tourism development projects are included in the development plans of other government agencies such as Main Roads WA, CALM and Department for Planning and Infrastructure. Identify a broader group of stakeholders focusing on: property sector; construction sector; financial institutions; investment houses and property trusts; federal, state and local government; special interest groups and the community. | Industry Development & Visitor Servicing | 2003 - 2008 |
| 1.8 | Adopt a festival approach to events. | Schedule related activities and events around a main event. This will result in visitors staying in WA longer and will also help to create the right atmosphere to support an event. | EventsCorp | 2004 - 2008 |
| 1.9 | Target national events to generate incremental business. | As bidding costs for global events continue to escalate, increase focus on attracting national championships which deliver better returns on investment. | EventsCorp | 2004 - 2008 |
| 1.10 | Maximise business tourism. | Develop a greater synergy between EventsCorp and the Perth Convention Bureau to ensure that we attract larger business tourism events to the State and cluster business tourism with hallmark events to convince visitors to stay longer in WA. | EventsCorp | 2003 - 2008 |
| 1.11 | Grow and diversify the Events Calendar. | Undertake research to identify potential events, measure event impact and identify upcoming trends. Include a mix of events that attracts new visitors to WA for a wide range of experiences. | EventsCorp | 2003 - 2008 |
| 1.12 | Use major international events for maximum tourism impact. | Ensure that these events are attracting new visitors to the State and that the broadcast coverage into our key international markets includes both images of WA and promotional competitions to attract viewers to travel to WA. | EventsCorp | 2004 - 2008 |

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Western Australian Tourism Commission

Strategic Plan 2003 - 2008