



Shire of Denmark

Tourism Planning Strategy

Stage 1

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Executive Summary

Stage 1 of the Tourism Planning Strategy investigates the role that tourism plays within the Shire of Denmark by defining the tourism appeal, providing a profile of the tourism industry and an understanding of tourism accommodation supply. It provides an overview of the recommendations of the Tourism Planning Taskforce and begins to address some of these recommendations by identifying areas of tourism significance in the Shire and undertaking a review of the Shire strategic and statutory planning environment as it relates to tourism. It further identifies priority planning issues that should be addressed.

It is concluded that the Shire is the most appropriate organisation to provide the necessary resources and lead in the preparation of the Tourism Strategy and has responsibility to provide the appropriate statutory and strategic planning environment to support the continued growth of the tourism industry and guide the nature and type of tourism development. The preparation of such a strategy should occur in consultation with key tourism agencies and the community.

1. Introduction

Tourism is a significant contributor to local economies in regional areas. This is particularly the case in the Shire of Denmark which is touted to become a WA holiday hot spot, given the increase in visitor numbers over the past two years while tourist numbers to other WA holiday towns have remained static or even declined (*The West Australian, Monday April 5, 2010*). Tourism provides the second highest number of jobs (next to agriculture) and as tourism continues to grow, a sustainable approach is required which builds upon a shared desire to establish a tourism industry that supports and enhances the local community, protects its environment and generates economic benefit.

Based on this, the preparation of a Tourism Strategy for Denmark is urgently required to guide the sustainable development of the tourism industry at various levels, which include the following:

- Governance through the Shire's Town Planning Scheme No.3 (the Scheme), Local Planning Strategy (LPS) and Local Planning Policies;
- Infrastructure planning and provision;
- Planning for and delivering a variety of accommodation types, amenities and attractions that meet the future needs of visitors;
- Environmental protection;
- Linkage of infrastructure development and planning to the marketing being undertaken by Denmark Tourism Inc;
- The inclusion of monitoring within both the policies and procedures of the Shire and Denmark Tourism Inc; and
- Application of a consistent brand that unifies the marketing approaches and messages being communicated from within Local Government, the visitor industry and the broader community.

This strategy details the outcomes of the investigations undertaken as part of Stage 1 of the Tourism Strategy (the Strategy) and only aims to provide a preliminary overview of tourism based in the Shire. The strategy also undertakes an assessment of the Shire's current statutory and strategic environment within which tourism development is facilitated and makes recommendations on the changes required to improve the outcome of planning related decisions, the community and the tourism industry at large.

Stage 2 of the Tourism Strategy is yet to be prepared and will allow for the preparation of a fully fledged tourism strategy that would address the issues above. It would actively involve Denmark Tourism Inc and will allow for input from the tourism industry and local community. A project brief has been prepared which details the objectives of the proposed Stage 2 of the Strategy and is attached (Attachment 1).

2. The Tourism Appeal of Denmark

The rugged coastline, beautiful beaches, inlets, rivers, national parks, and towering karri forests offers visitors unforgettable scenery and plenty of activities. Denmark is unique, in a sense that over 75% of the total Shire is covered by National or State forest, ensuring significant areas of unspoilt natural wonder still exists.

Popular theory suggests that Denmark's appeal is based upon its natural attractions and year round climate. However, this theory has not been tested amongst the visitor market. There has been very little recent research to confirm that these features are in fact what make Denmark popular potentially risking the emergence of new visitor markets based upon other elements of the Shire. This is most clearly highlighted in the different brands that exist and are used within the Shire, from "Where the Forest meets the Sea" to "Denmark It's only Natural".

3. Tourism Profile

The strategy provides a brief overview of the Shire's tourism profile, based on existing accessible information. Both Tourism WA and Tourism Australia provide profiles (Attachment 2 and 3) on the nature of tourism in the Shire, however these profiles are limited in the range of tourism information and would not necessary satisfy the information needs of a fully fledged tourism strategy as intended to be prepared under Stage 2. These profiles are attached and summarised below.

3.1 Tourism Western Australia (May 2007): Local Government Area Fact Sheet, Shire of Denmark

The following presents a summary of relevant information contained in this fact sheet (based on the 2005/2006 average):

Visitors
The majority of visitors (82%) to the Shire are from intrastate (tourists from elsewhere within WA); with the remainder being from interstate (10%) and international (8%).
The average length of stay for intrastate travellers is 3.4 nights, interstate travellers 2.0 and international visitors 3.2.

Purpose of visit
Domestic travellers visit the Shire mainly for holiday/leisure purposes (59%). Other reasons cited include visiting friends and relatives (27%) of visitors and business (8%).
International visitors visit the Shire mainly for holiday/leisure purposes (90%) and visiting friends and relatives (9%) are another reason cited.

Accommodation
Domestic visitors stay predominantly with friends and relatives (34%) and in hotel/resort/motel accommodation (24%). 19% percent of visitors stay in caravan parks or camping on private property, 10% stay in a rented house and 4% in guest house or B&B.
International visitors stay in a range of accommodation types of which caravans (29%) and hotel/motel/resort (28%) are the predominant types. Other accommodation types cited are backpacker/hostel (13%), rented house (13%) and staying with friends or relatives (11%).

Activity
The predominant leisure activities that domestic visitors undertake are social and outdoor/leisure. Other activities cited are active outdoor/sport and visiting local attractions.
The predominant activity undertaken by international visitors are outdoor/nature, visiting local and

tourist attractions and social/other (i.e. visiting friends and relatives, movies, pubs, clubs, organised sporting event, shopping for pleasure, sightseeing, tourist cruises). Active outdoor/sport is another activity cited.

Transport

For domestic visitors, a private/company vehicle is the predominant means of travel (84%). Hire vehicle makes up a smaller portion of means of travel (8%) and bus or coach (2%).

International visitors rely on rental vehicles (46%), private/company cars (33%) and self drive van, motor home or campervan (15%). The remaining 4% travel by bus/coach.

3.2 Tourism Australia (March 2008): Tourism Profiles for Local Government Areas in Regional Australia Western Australia, Denmark Shire

Within this publication, the information provided is similar to that made available by Tourism WA. However, additional information is presented below.

Summary of International and Domestic Travel within Denmark Shire, State and National

SUMMARY OF INTERNATIONAL AND DOMESTIC TRAVEL TO LOCAL GOVERNMENT AREA			
Three or four year average to June 2007			
	International	Domestic overnight	Domestic day
Visitors ('000)	10	97	86
Visitor nights ('000)	27	306	-
Spend (\$million)	1	31	6
Average stay (nights)	2.7	3.2	-
Average spend per trip (\$)	110	316	68
Average spend per night (\$)	40	100	-
State average			
Average stay (nights)	25.3	4.7	-
Average spend per trip (\$)	2 165	543	95
Average spend per night (\$)	86	116	-
National average			
Average stay (nights)	28.5	3.9	-
Average spend per trip (\$)	2 758	500	94
Average spend per night (\$)	97	127	-

Summary of Tourism Businesses within Denmark Shire

SUMMARY OF TOURISM BUSINESSES IN LOCAL GOVERNMENT AREA				
As at June 2007				
Tourism businesses	Number	%	State average %	National average %
Non-employing businesses	87	52	51	50
Micro businesses (1-4 employees)	42	25	25	27
Small businesses (5-19 employees)	36	21	17	16
Medium to large businesses (20 or more employees)	3	2	7	7
TOTAL BUSINESSES	168	100	100	100

4. Tourism Accommodation Supply

This section determines the categories of accommodation types and number of accommodation facilities available for visitors to the Shire. The strategy has been based solely on information made available by the Denmark Visitor Centre. Although it is acknowledged this is by no means comprehensive, it provides a satisfactory overview of the types and number of accommodation premises. The accommodation supply is depicted on Map 1.

The following sets out the categories of accommodation types available in the Shire:

Apartments	Self-catering accommodation and is situated in the town centre.
Backpackers	Low-budget accommodation with communal rooms, showers and toilets and a representative available 24 hours a day.
Bed and Breakfast	A dwelling used by a resident which provides rooms for short stay accommodation and includes the provision of breakfast.
Caravan and Camping:	Low-budget accommodation with caravan and camping sites available with communal facilities such as kitchens, laundry and TV rooms and occasionally chalets. Up-market caravan parks provide on-suite bathroom facilities.
Chalets	Self-catering accommodation mainly situated on rural land and consisting of two or more chalets.
Farmstay:	Provides accommodation as part of a farm experience generally located in the existing dwelling.
Guesthouse	The provision of separate living areas, daily servicing and a host/manager.
Home Holiday	Self-catering accommodation that consists of a residential house made available for short stay accommodation.
Hotel/Motel	Have an onsite representative contactable 24 hours a day and includes servicing, bedding and private showers and toilets.

In general, the Shire hosts a wide variety of accommodation types. Accommodation such as bed and breakfast, apartments, hotel/motel accommodation, holiday homes and backpackers are available in the town centre with easy access to services and facilities. Opportunities for a more rural stay are also offered with chalets, caravan and camping, farmstay and a small number of home holiday accommodations. There is no resort style accommodation in the Shire following the closure of Karri Mia Resort.

Preparation for Stage 2 of the strategy will include further work to provide a comprehensive analysis in the form of an Accommodation Study and addresses the following, but not limited to:

- Accommodation supply
 - A complete list of accommodation facilities in the Shire;
 - The number of beds available for tourism purposes;
 - Ascertainment of the Shire's total capacity to accommodation visitors, and
 - Determine occupancy rate trends.
- Accommodation demand.
- Accommodation gaps.

5. Recommendation of the Tourism Planning Taskforce

The Tourism Taskforce is a WA State Government initiative, established in July 2002 by the then State Government to examine issues surrounding introducing a residential component into developments on tourist zoned land, and the strata titling of tourism developments.

The subsequent Taskforce report considers that Local Government Town Planning Schemes are an important instrument for implementing the Taskforce recommendations and that a tourism component be prepared as part of a decision-making framework for tourism proposals in Local Planning Strategy's. Other more specific recommendations in relation to the preparation of tourism strategies that stem from the Taskforce are:

- The identification of sites and locations of strategic tourism significance.
- The introduction of an extended range of definition for tourism development with specific reference to length of stay provisions, to provide for consistency in the classification of different tourism activities.
- Introduction of a range of tourism zones (i.e. caravan park and camping grounds, cabins and chalet, motel, hotel, tourist resort, tourist accommodation and tourist investigation) and the permissibility of land uses in each zone.
- Length of stay provisions and use restrictions on tourist accommodation in tourism zones.
- Recognition of the use of strata schemes to finance tourism developments subject to specific requirements for integrated development and management.

Based on the outcomes of the Tourism Planning Taskforce, the WAPC published Planning Bulletin 83 – Planning for Tourism (Attachment 4) which sets out the interim policy of the WAPC to implement the recommendations of the Tourism Planning Taskforce.

The implementation of the Taskforce recommendations that Local Government develop a tourism planning strategy that outlines the tourism implications for the local town planning strategies and land use is required however, it should form part of a broader strategy that

addresses issues including marketing, visitor servicing, monitoring and service delivery. The absence of addressing marketing issues makes this process much more complex and risks the potential to integrate planning with marketing in a holistic approach.

The Strategy provides a review of the Shire's statutory and policy environment and makes suggestions to address the above recommendations by the Taskforce.

6. Areas of Tourism Significance in the Shire

The identification of '*areas of tourism significance*' and '*sites of local significance*' will assist Council in determining the outcome of residential use proposal in tourism developments, rezoning and development proposals.

The Strategy identified criteria which will inform the identification of '*areas of tourism significance*' in the Shire and is depicted on Map 2. These criteria are as follows:

- Tourism routes being Scotsdale Road;
- Sealed roads;
- Access;
- National, marine and regional parks;
- Oceans and rivers;
- Landmarks;
- Vistas with viewpoints to Wilson Inlet, the coast and the rural hinterland;
- Attractions and amenities;
- Access to services and facilities;
- Rail Trail;
- Bibbulmun track;
- Aboriginal Heritage Site; and
- Cultural Heritage Sites.

It has not been the aim of this stage of the strategy to identify sites of *local significance* as this will require in depth investigation into each and every existing tourism zoned and/or developed site in the Shire. Such an investigation should be comprehensive to inform Council future decision making and is more relevant under Stage 2. In addition to this, Stage 2 should further assess future tourism land needs and availability of sites.

7. Statutory Review

7.1 Town Planning Scheme No. 3

7.1.1 Zoning Table and Land Use Permissibility

The Scheme incorporates a Tourist zone under which a wide spectrum of land uses is permissible including many ancillary uses not completely tourism related. The objective of the Tourist zone is "for tourist accommodation and associated services" to establish and operate in a designated zone in a manner consistent with a list of pre-determined activities. The schedule of Tourist Zones as contained in the Scheme consists of 10 areas as listed in Appendix 1. Numerous other tourist sites exist within the Shire, however as these do not

have a comprehensive development plan associated with them, they are subject to the more general tourist provisions as specified within the Scheme.

The permitted tourism related land uses under the Scheme are set out in the following table:

Table 1: Zones within which tourism related land uses are permitted

	Residential	Tourist	Commercial	Rural	Rural Multiple Occupancy	Professional Office
Boarding House	AA	P	SA	AA	X	X
Caravan Park	X	AA	X	SA	X	X
Cellar Sales	X	SA	X	SA	X	X
Gallery/Restaurant	X	SA	SA	SA	SA	SA
Holiday Accommodation	SA	AA	AA	SA	SA	SA
Market	X	AA	P	AA	AA	X
Motel	X	SA	SA	SA	X	X
Private Recreation	X	P	AA	AA	AA	X
Restaurant	SA	AA	P	AA	SA	SA
Shop	X	AA	P	X	IP	IP
Winery	X	SA	SA	SA	SA	X

7.1.2 Special Residential Zone

Holiday Home is a use not listed and therefore not permitted within the zone. This is a critical issue to our Shire and requires attention particularly given that at least if not more than 34% of our visitors are using accommodation of friends and relatives which may incorporate home holiday rental.

7.1.3 Special Rural Zone

In all of the Special Rural Zones with the exception of SR20 – Suttons Road Special Rural Zone holiday accommodation (on the basis that it is limited to accommodation which is solely within the dwelling) is permitted at Council’s discretion. Other tourist related land uses permitted with the Special Rural zone are:

- SR10 (Lantzke Road) allows for a gallery/restaurant on the basis that it is limited to a maximum floor area of 900m².
- SR22 (Myers Road) allows for a health retreat on Lot 80 Myers Road on the basis that it is limited to accommodation solely within the dwelling and ancillary accommodation and numbers are limited to a maximum of 6 other than the property owner.
- SR23 (Seaview) allows for cottage industry.

7.1.4 Landscape Protection Zone

There are four areas within the Landscape Protection Zone of which only two allows for tourism related uses. LP1 Lapko Road a gallery/restaurant (limited to max floor area of 250m²) is permitted at Council’s discretion following advertising and LP4 Howe Road permits holiday accommodation at Council’s discretion.

7.1.5 Schedule of Additional Uses

Under the Scheme, there are 23 additional use sites. Of these 16 are for either tourism related land use and include:

- holiday accommodation;
- caravan park, camping area;
- environmental education centre;
- chalets;
- cellar sales and wine tasting;
- cottage industry; and
- private recreation.

7.1.6 General Provisions

General provisions relating to development standards (Clause 5.1) in the tourist zone allow for tourist developments to be assessed on merits as follows:

Zone	Minimum setback			Max ratio	Plot	Maximum coverage	site	Landscaping
	Front	Side	Rear					
Tourist	As determined by Council							10%

Tourist Zone provisions (Clause 5.33) requires that “all tourist zones shall require development to be in accordance with a Development Plan approved by Council and conditions of development shall be in accordance with Appendix 13 – Schedule of Tourist Zones”.

7.1.7 Definitions of Tourism Uses

The Scheme offers some definitions within Appendix 1 – ‘Interpretations’ for tourist related land uses as follows:

- Caravan Park;
- Cellar Sales;
- Gallery/Restaurant;
- Health Studio;
- Holiday Accommodation; and
- Winery.

Conclusions:

Based on the above assessment the following conclusions are drawn:

- The Tourist zone allows for a wide range of uses including those unrelated to tourism which are not in accordance with the objective of the zone. Some discretionary uses within the Tourist zone such as ‘aged or dependant persons dwelling’, ‘aquaculture’ and ‘grouped dwelling’ may result in the land being sterilised for tourism development.
- Over time, as business models and regional demands change, many of the current operating activities on Tourism zoned land fail to reflect the anticipated use on site. Additionally, many Tourism zoned sites remain undeveloped and sites that are not zoned tourism become relevant to the tourism industry based upon the brand that is being promoted and therefore may need consideration as a tourism zone.

- The schedule of Tourist Zones shows that a large range of tourist related land uses have been approved within the Shire.
- The Schedule of Additional Uses shows that a large range of tourist related land uses have been approved as an additional use, usually associated with the rural zone.
- Land use permissibility of tourist related land uses is inconsistent across zones. For example holiday home accommodation is allowed in the Residential and Special Rural zones but not in the Special Residential and Landscape Protection zones where these zones are equally suitable for holiday home accommodation.
- The list of definitions (Appendix 1 – Interpretations) is not comprehensive or consistent with the uses listed under the Zoning Table and uses approved under the Tourist Zone and as an Additional Use.
- A number of tourist zoned sites no longer operate where the primary activity on site is specified as being ‘accommodation’. Some degree of flexibility is required to keep the primary activity on site operating, either by allowing more permissibility for ancillary uses.

Recommendations:

Based on the above assessment the following recommendations are made:

- Review all other zones in terms of the permissibility of tourism related land uses.
- Review Appendix 1 – Interpretations to introduce an extended range of definitions for tourism development with specific reference to length of stay provisions, to provide for consistency in the definitions.
- Introduce length of stay provisions and land use restrictions on tourist accommodation in tourism zones.

8. Policy Review

8.1 Town Planning Scheme Local Planning Policies

The Scheme’s Local Planning Policies (LPP) generally provide guidance to the local government, the community and proponents to assist in the interpretation and implementation of the Scheme.

There are three LPP’s relevant to tourism, which include:

- No. 7 – Second Dwelling/Additional Houses and Chalet Developments on Rural Zoned Lots;
- No. 18 – Tourist Development other than ‘Bed & Breakfast’ uses within the residential zone; and
- No. 19.2 – Home Holiday Accommodation.

8.1.1 TPS Policy No. 7 – Second Dwelling/Additional Houses and Chalet Developments on Rural Zoned Lots

The policy allows for chalet development at Council’s discretion as follows:

AA use:

- One Residential Building and Chalet

- One Residential Building and Two Chalets

SA use:

- One Residential Dwelling and Three or Four Chalets
- Two Residential Dwellings and Four Chalets

A Scheme Amendment is required to:

- Create an additional use site where one or two residential dwellings and between five and eight chalets are proposed; and
- Rezone land to a dedicated tourist zone where chalet developments that exceed eight are proposed.

For each of the above, Council requires a higher standard of development and upgrading of infrastructure.

Conclusion:

- The policy supports the establishment of small scale tourist businesses and is sound in its approach to the scale of tourism development and level of planning consent and/or amendment required. The policy will continue to ensure that tourism development occurs sustainably and in a co-ordinated manner.
- The policy however, deals with two matters. The first is the number of houses on rural blocks, particularly where more than one dwelling is proposed, and the second the type of tourism development on the same block. It is considered that the issue of the number of houses on rural blocks are separate to that of tourist development and it may be useful to separate the two matters into two policies.

Recommendation:

- Review the policy to create two separate policies, one dealing with the matter of the number of dwellings on rural properties and the second dealing with the matter of tourism development.

8.1.2 TPS Policy No. 18 – Tourist Development other than ‘Bed & Breakfast’ uses within the residential zone

The objective of this policy is to allow for small scale uses to be established within the Residential Zone provided the nature and scale of the proposals are considered compatible and complementary to the existing adjacent residential living environment and amenity. Small scale uses are defined as ‘attached studios’. No further definition or clarity on the type of uses is provided.

The need for the policy is questioned. ‘Attached studios’ fall within the definition of a Cottage Industry, considered an AA use in the Residential zone. Cottage Industry is defined in the Scheme as:

“an industry which produces arts and craft goods which cannot be carried out under the provisions relating to a home occupation and that does not affect the amenity of the neighbourhood, does not entail the employment of any person not a member of the family, does not occupy an area in excess of 55m², does not require the provisions of any essential service main of a greater capacity than normally required in the zone and does not display a sign exceeding 0.2m²”.

Conclusion:

- The policy is superfluous to Scheme provisions and land uses permissibility in the Residential zone.

Recommendation:

- Delete the TPS Policy No. 18 entitled “Tourist Development other than ‘Bed and Breakfast’ uses within the residential zone”.

8.1.3 TPS Policy 19.2 Home Holiday Accommodation

The policy acknowledges the increasing use of dwellings available for short term accommodation and states that the nature and scale of proposals must be compatible and complementary to the existing residential environment and amenity. It provides specific conditions which Council may impose on Home Holiday Accommodation.

Conclusions:

Since the initiation of the preparation of a Tourism Strategy, holiday homes have received renewed attention. The Shire contains a large number of holiday homes, some of which operate illegally (i.e without a planning approval). Holiday homes have caused conflict within the community due to the impact on residential amenity, community feel and change in neighbourhood character over time. The large number of holiday homes and the perceived business and tax benefits are considered by other tourist operators as a threat to the viability of their business. Other issues identified with holiday homes are the lack of accreditation (quality thereof) and appropriate management procedures to deal with maintenance, cleaning etc, potentially affecting the Shire’s tourism reputation.

There is an increasing trend for homes in residential areas being used as holiday homes in numerous towns within the State. To investigate this growing trend, Planning Bulletin 99 – Holiday Homes Guidelines was WAPC.

Recommendations:

Review this policy to address the matters raised in Planning Bulletin 99 – Holiday Homes Guidelines. The proposed policy should address the following matters, but not be limited to:

- Impact on amenity of adjoining residents;
- Protecting the residential amenity of neighbourhoods;
- Absentee property owners;
- Management of holiday homes; and
- Voluntary accreditation of holiday homes.

9. Major Planning Issue Identification

There are two major issues relevant to Council in its administration of tourism uses, being holiday home accommodation and permanent residential accommodation in tourism developments.

9.1 Holiday Home Accommodation

The issue relating to permissibility and management of holiday homes in the Shire has been discussed in detail above and is not repeated here.

9.2 Permanent Residents in Tourism Developments

The Tourism Taskforce Report investigated the trend in WA of introducing a permanent residential accommodation component in tourism developments. The Shire has not been immune to this trend. Ocean Beach Caravan Park, Rivermouth Caravan Park and Karri Mia have all been approved by Council for the inclusion of a percentage of permanent residents (generally between 14-20%) and subject to an array of other specific conditions.

Conclusions:

There is currently a lack of policy direction for a permanent residential component in tourism developments.

Recommendations:

- Prepare a LPP which provides a statement of Council's position on permanent residents in tourism developments and address the following issues:
 - Potential loss of high value tourism sites to residential use;
 - Establishing a sustainable economic activity;
 - Impact of tourism use on residential amenity;
 - Assessment of the suitable number of permanent residents in tourism development based on merits;
 - Site assessment being based on environmental, site amenity and community issues in assessing the number of permanent residential units on site;
 - Protection of the tourism quality of the site and ensuring that the general character remains that of a tourism development. This is particularly important at sites where the isolation, relative lack of development and natural beauty are recognised as providing a "point of difference" that may/will increase future tourism; and
 - Acknowledge that permanent residents provide financial stability to tourism operations.

10. Conclusion

The Shire needs to provide the appropriate resources and take leadership in the preparation of Stage 2 of the Tourism Strategy and has responsibility to provide the appropriate statutory and strategic planning environment to support the continued growth of the tourism industry and guide the nature and type of tourism development. The preparation of such a strategy should occur in consultation with key tourism agencies and the community.



Draft Project Brief Tourism Strategy

May 2010



1. Background

Tourism is a significant contributor to local economies in regional areas. This is particularly the case in the Shire of Denmark where tourism provides the second highest number of jobs (next to agriculture) and the preparation of a Tourism Strategy to inform and facilitate sustainable growth of the industry is therefore important. It is also a recommendation of the Tourism Planning Taskforce that a tourist component of the local planning strategy be prepared as part of a decision-making framework for tourism proposals.

Other relevant recommendations to the preparation of tourism strategies that stem from the Tourism Planning Taskforce are:

- The identification of sites and locations of strategic tourism significance.
- The introduction of an extended range of definition for tourism development with specific reference to length of stay provisions, to provide for consistency in the classification of different tourism activities.
- Introduction of a range of tourism zones (ie caravan park and camping grounds, cabins and chalet, motel, hotel, tourist resort, tourist accommodation and tourist investigation) and the permissibility of land uses in each zone.
- Length of stay provisions and use restriction on tourist accommodation in tourism zones.
- Recognition of the use of strata schemes to finance tourism developments subject to specific requirements for integrated development and management.

2. The Nature of Tourism in Denmark

Denmark offers a variety of holiday accommodation such as hotels, motels, chalets on rural properties, boarding houses, caravan parks and camping grounds, bed and breakfast, holiday home accommodation and a few backpackers accommodation.

Tourists can enjoy a varied experience of activities and attractions offered by its rugged coastline beautiful beaches, inlets, rivers, national parks, and towering karri forests. Denmark also offers attractions through its growing food and wine region. There are cellar door operations and restaurants and cuisine from local produce – fruits, fish, marron, cheese, olives and home-grown meats. Denmark is rich in arts and crafts and hosts a number of art festivals, art exhibitions, galleries and craft shops.

Of preliminary concern to the Shire is the loss of tourist accommodation to permanent residential homes and the number of illegal holiday home accommodation and the resultant implications it may have on its tourist industry. More in particular the Strategy will investigate the situation and make recommendation for management thereof through its statutory and policy environment.

Other preliminary issues identified for tourism in the Shire are:

- High seasonal variation with a high influx of tourist during summer months in particular Christmas and Easter and low visitation during winter months.
- Recent loss of the Karri Mia Resort and resultant implication on the tourism industry.
- Extended coast line of which a large percentage is held by Crown and the retention of small sections of freehold land that abuts the coast for tourism related projects.
- A relatively old Town Planning Scheme which has not been updated in accordance with the Model Scheme Text and therefore requires update in terms of tourist related zones, land uses, definitions and permissibility.

3. Purpose/aims of the Strategy

The purpose of the Tourism Strategy is to provide Council and the community with a land use planning framework for decision making on tourism proposals.

The strategy will aim to:

- Develop a vision for the development of tourism in the Shire.
- Identify the role and importance of tourism locally (Shire of Denmark) and within a regional context (South West and Great Southern).
- Undertake a supply analysis of the existing range of tourist accommodation within the Shire .
- Project future demand for specific categories of accommodation (including activities, access, amenities and attractions) relative to market trends and identify gaps in the accommodation market.
- Identify the role of attractions, activities, access and amenities in the Shire's tourism industry (SWOT analysis).
- Examine other tourism opportunities within the Shire.
- Develop a site assessment methodology to assess the relevant tourism value of existing and prospective development sites.
- Apply the site assessment methodology to identified existing and prospective development sites and classify each in terms of its significance.
- Review the Shire of Denmark's statutory and strategic environment and providing recommendations on changes to the Shire's Town Planning Scheme, Local Planning Strategy and Town Planning Scheme Policies.
- Undertake consultation with relevant government agencies, tourism and development industry.

4. Approach to Strategy

4.1 Preparation:

The strategy will predominantly be prepared inhouse. It is envisaged that aspects of it may be outsourced to consultants such as the supply and demand analysis and industry consultation.

4.2 Consultation:

The Tourism Strategy will be prepared in consultation with stakeholders within the tourism industry and state government agencies only.

The consultation will be undertaken to gain an understanding of the aspirations of the tourism industry, the supply and future demand for accommodation and the strengths and weaknesses of the Shire's attractions, access, amenities and activities.

Stakeholders identified are:

- Denmark Tourism Inc. and Denmark Visitors Centre.
- Valley of the Giants Heritage and Tourism Association.
- Operators of tourist resorts, caravan parks and camping grounds, bed and breakfast, chalets, holiday homes and any other accommodation providers.
- Tourist attractors such as wineries, cheese factory, toffee factory, chocolate factory, olive farms etc.
- Tourist services such as eco adventures, bus tours etc.
- State Government agencies such as Tourism WA, DEC and DPI.
- Representative bodies of caravan parks and camping grounds, wine industry and any others identified.

Stakeholder input will be provided at key milestones i.e. Review of Issues, Options Paper and Draft Strategy.

4.3 Output

The Strategy will be prepared over 3 stages as follows:

Background Report

- Inventory
- Data Collection and Analysis
- Consultation
- Demand and Supply Analysis
- SWOT Analysis on attractions, access, amenities and activities
- Review of Statutory and Policy Environment

- Review of Issues

Draft Strategy

- Project Background and Contents
- Demand Analysis
- Supply Analysis
- Activities/Attractions/Amenities/Access Analysis
- Strategic Site Assessment Methodology
- Tourism Site Determination
- Recommendations and Actions: Local Tourism Planning
- Consultation

Final Strategy/Report

4.4 Deliverables

- | | |
|-------------------------|--|
| <i>Background Paper</i> | <ul style="list-style-type: none"> • 3 Hard copies • 1 Electronic copy |
|-------------------------|--|

- | | |
|-----------------------|--|
| <i>Draft Strategy</i> | <ul style="list-style-type: none"> • 3 Hard copies • 1 Electronic copy • Council Report |
|-----------------------|--|

- | | |
|-----------------------|--|
| <i>Final Strategy</i> | <ul style="list-style-type: none"> • 3 Hard copies • 1 Electronic copy • Council Report |
|-----------------------|--|

4.3 Funding

The Shire will apply for funding under the Tourism WA Landbank initiative. It is expected that approximately \$5,000 will be received.

4.4 Expected Timeframe

The Strategy will be prepared over a three month period from the date of commencement.

4.5 Project Review and Progress Meetings

A project team is to be established consisting of planning staff, other officers as required, Tourism Industry and relevant Government Departments. Meetings will be held at key milestones i.e. Review of issues, Options Paper and Draft Strategy.

RESEARCH AND ANALYSIS
Local Government Area Fact Sheet
Shire of Denmark 2006



Date Published: 23 May 2007

General Information

Population: 5,337
Area: 1,843 sq km
Distance from Perth: 400 km
(Source: ABS Cat. 3218.0 2004/05)

Mean Max Temp: 20.5
Mean Min Temp: 9.8
Ave Yearly Rainfall: 998.4 mm
(Source: Bureau of Meteorology)

Sources

This publication summarises information Tourism WA received from Tourism Research Australia (TRA) International Visitor Survey (IVS) & National Visitor Survey (NVS), and the Australian Bureau of Statistics, Survey of Tourist Accommodation (STA).

All figures are based on a two year average

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. Tourism WA 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 considering his or her own particular circumstances. Tourism WA expressly disclaims all liability in respect of anything done or omitted to be done by anyone in reliance upon any part of this document.



HIGHLIGHTS – 2005 & 2006 Two Year Average

Intrastate

- 93,000 intrastate visitors stayed overnight in the Shire of Denmark, accounting for 82% of total visitors to the area.
- Intrastate visitors stayed a total of 315,000 nights in the Shire of Denmark. On average they stayed 3.4 nights.

Interstate

- 11,000 interstate visitors stayed overnight in the Shire of Denmark, accounting for 10% of all visitors in the area.
- Interstate visitors stayed a total of 22,000 nights in the Shire of Denmark. On average they stayed a total of 2 nights.

International

- 9,400 international visitors stayed overnight in the Shire of Denmark, accounting for 8% of all visitors to the area.
- International visitors stayed a total of 29,700 nights in the Shire of Denmark. On average international visitors stayed for 3.2 nights.

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Unless otherwise stated, all data as been sourced from:

Tourism Research Australia – International Visitor Survey
Tourism Research Australia – National Visitor Survey

Note: All figures in this publication are based on a two year rolling average, meaning that the 2005 and 2006 figures have been added and divided by 2, to provide an averaged figure. This has been done to increase the sample size and hence increase reliability of the data.

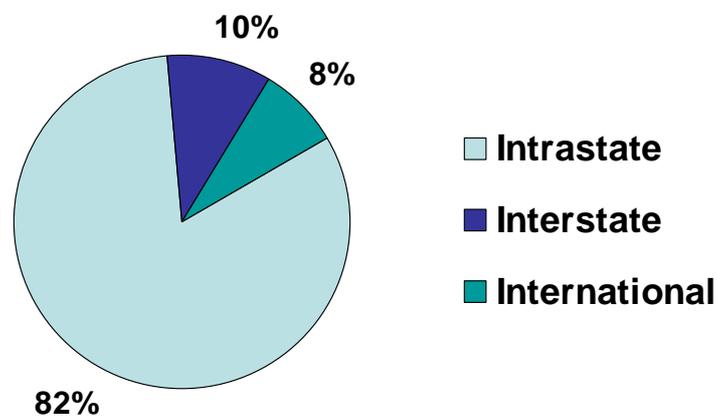
Overall Visitor Summary

	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Overnight Visitors								
Intrastate Visitors ⁽¹⁾	73,000	71%	72,500	71%	86,000	77%	93,000	82%
Interstate Visitors ⁽¹⁾	19,500	19%	18,500	18%	16,500	15%	11,000	10%
International Visitors ⁽²⁾	10,100	10%	11,500	11%	8,500	8%	9,400	8%
Total Overnight Visitors	102,600	100%	102,500	100%	111,000	100%	113,400	100%
Overnight Visitor Nights								
Intrastate Nights	283,500	75%	267,500	70%	262,000	71%	315,500	86%
Interstate Nights	78,500	21%	97,500	25%	85,500	23%	22,000	6%
International Nights	18,300	5%	19,300	5%	20,500	6%	29,700	8%
Total Nights	380,300	100%	384,300	100%	368,000	100%	367,200	100%
Average Length of Stay (nights)								
Intrastate Stay	3.9		3.7		3.0		3.4	
Interstate Stay	4.0		5.3		5.2		2.0	
International Stay	1.8		1.7		2.4		3.2	

Percentages and figures may not add up to total due to rounding

- (1) Overnight Domestic Visitors Definition: Australian residents aged 15yrs and over who spent at least one night away from home in Western Australia
- (2) Overnight International Visitors Definition: International visitors aged 15 yrs and over who spent at least one night in the region

Denmark Visitors



Regional Perspective

Purpose of Visit

Purpose of Visit	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Domestic								
Holiday/Leisure	64,000	69%	60,500	67%	57,500	56%	61,500	59%
VFR	21,500	23%	19,500	22%	25,000	24%	28,000	27%
Business	2,500	3%	3,000	3%	9,000	9%	8,000	8%
Other	1,500	2%	2,000	2%	3,500	3%	3,000	3%
Total	92,500	100%	90,500	100%	102,500	100%	104,000	100%
International								
Holiday/Leisure	9,900	98%	11,200	97%	7,900	93%	8,500	90%
VFR	100	1%	100	1%	500	6%	800	9%
Business	100	1%	100	1%	0	0%	0	0%
Other	0	0%	0	0%	0	0%	100	1%
Total	10,100	100%	11,500	100%	8,500	100%	9,400	100%
Total								
Holiday/Leisure	73,900	72%	71,700	70%	65,400	59%	70,000	62%
VFR	21,600	21%	19,600	19%	25,500	23%	28,800	25%
Business	2,600	3%	3,100	3%	9,000	8%	8,000	7%
Other	1,500	1%	2,000	2%	3,500	3%	3,100	3%
Total	102,600	100%	102,000	100%	111,000	100%	113,400	100%

Note: Purpose categories may not add to total overnight visitor estimates as overnight visitors may report several purposes for visiting various locations on a visit to the region.

Note: Purpose may not add to total due to not all respondents being asked purpose

Purpose for visit categories include the following: **Hol/Leisure** comprises holidays, leisure/relaxation/getting away, entertainment/attending special events, sport participation, sport spectating ,shopping; **Visiting friends/Relatives** comprises visiting friends or relatives; **Business** comprises work (as driver/transport crew), business/other work, conferences/exhibitions/conventions/trade fairs, training and research; **Other** includes everything else such as education (mostly students), employment leisure (e.g. working holiday), personal appointment/business (excl. health), health related and providing transport.

Accommodation

Domestic Visitors

Accommodation	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Friends or relatives property	23,500	25%	23,500	26%	31,500	31%	35,500	34%
Hotel/resort/motel	23,500	25%	21,000	23%	22,500	22%	24,500	24%
Caravan park or commercial camping ground	14,000	15%	16,500	18%	15,500	15%	12,000	12%
Rented house/apartment/flat /unit	13,500	15%	12,000	13%	11,000	11%	10,500	10%
Caravan or camping near road or on private property	5,000	5%	1,500	2%	4,000	4%	7,000	7%
Guest house or B&B	5,500	6%	2,500	3%	3,000	3%	4,000	4%
Other ⁽¹⁾	3,000	3%	7,500	8%	8,000	8%	7,500	7%
Total	92,500	100%	90,500	100%	102,500	100%	104,000	100%

International Visitors

Accommodation	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Caravan	4,100	41%	5,300	46%	3,200	38%	2,700	29%
Hotel/resort/motel	3,200	32%	3,300	29%	2,400	28%	2,600	28%
Backpacker/hostel	1,200	12%	1,000	9%	700	8%	1,200	13%
Rented house/apartment/flat /unit	700	7%	1,200	10%	1,000	12%	1,200	13%
Home of friend or relative	200	2%	100	1%	600	7%	1,000	11%
Guest house or B&B	700	7%	700	6%	500	6%	600	6%
Other ⁽¹⁾	0	0%	0	0%	200	2%	200	2%
Total	10,100	100%	11,500	100%	8,500	100%	9,400	100%

Survey of Tourist Accommodation Figures - 2006

Month	Establishments	Bed Spaces	Room Occupancy Rate	Takings per Room Night Occupied	Guest Rooms
January	4	331	61%	\$111.60	102
February	4	331	47%	\$98.90	102
March	4	331	58%	\$93.50	102
April	4	336	55%	\$110.30	102
May	4	336	29%	\$103.40	102
June	4	336	39%	\$101.00	102
July	4	322	31%	\$112.50	99
August	4	322	26%	\$105.50	99
September	4	322	37%	\$103.10	99
October	4	318	44%	\$133.60	98
November	4	318	43%	\$135.00	98
December	4	318	54%	\$99.30	98
AVERAGE	4	327	44%	\$108.98	100

Source: ABS, Survey of Tourism Accommodation (STA)

Note: Comprising establishments with 15 or more rooms/units.

Leisure Activities

Domestic Visitors

Activity	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Outdoor/nature	67,500	73%	61,500	68%	61,500	60%	63,000	61%
Active outdoor/Sport	28,000	30%	31,500	35%	31,000	30%	33,500	32%
Arts or heritage	21,500	23%	17,000	19%	13,500	13%	13,500	13%
Local attractions/tourist activities	16,000	17%	25,000	28%	27,500	27%	31,500	30%
Social/others	70,500	76%	67,000	74%	78,000	76%	91,000	88%
Total	92,500	100%	90,500	100%	102,500	100%	104,000	100%

Note: Numbers and percentages may not add up to total as visitors may undertake more than one activity when visiting the region. Also rounding, averaging and those who gave no response.

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/other** - 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.

International Visitors

Note: These activities are not necessarily undertaken in Denmark. They are activities that international visitors to Denmark have done during their entire stay in Australia, which may also include visits to other regions or states. (i.e. they may have been undertaken while in Perth or other destinations outside the region)

Activity	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Outdoor/Nature	9,300	92%	10,400	90%	7,900	93%	9,400	100%
Active outdoor/sport	5,000	50%	6,100	53%	5,100	60%	5,300	56%
Arts/Heritage	7,500	74%	9,000	78%	6,500	76%	7,800	83%
Local Attraction/Tourist Activity	8,600	85%	9,700	84%	7,300	86%	9,000	96%
Social/Other	8,500	84%	9,700	84%	7,600	89%	9,300	99%
Total	10,100	100%	11,500	100%	8,500	100%	9,400	100%

Note: Numbers and percentages may not add up to total as visitors may undertake more than one activity when visiting the region. Also rounding, averaging and those who gave no response.

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/other** - 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.

Transport

Domestic Visitors

Transport	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Private/company vehicle	77,500	84%	74,000	82%	86,000	84%	87,500	84%
Rented/hire vehicle	6,500	7%	7,000	8%	8,000	8%	8,000	8%
Bus or coach	1,000	1%	1,500	2%	1,000	1%	2,500	2%
Air transport	3,500	4%	2,000	2%	0	0%	500	0%
Other ⁽¹⁾	1,000	1%	1,000	1%	500	0%	2,500	2%
Total	92,500	100%	90,500	100%	102,500	100%	104,000	100%

Note: Transport numbers and percentages may not add up to total due to those that were not asked the question and those who may have reported using several means of transport on a visit to the region.

(1) Other categories of transport include: passenger lines and ferries, other water way, railway, other land transport, combination of air and long road, combination of seas and long road, taxi, chauffeur driven hire car, long distance train (non suburban), ship/boat/ferry, local public transport, other.

International Visitors

Transport	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Rental car	3,900	39%	4,600	40%	3,600	42%	4,300	46%
Private/company car	3,400	34%	3,600	31%	2,700	32%	3,100	33%
Self drive van, motor home or campervan	1,800	18%	2,400	21%	1,700	20%	1,400	15%
Bus/Coach	1,000	10%	800	7%	500	6%	400	4%
Aircraft	0	0%	0	0%	0	0%	100	1%
Other ⁽¹⁾	0	0%	0	0%	0	0%	200	2%
Total	10,100	100%	11,500	100%	8,500	100%	9,400	100%

Note: Transport numbers and percentages may not add up to total due to those that were not asked the question and those who may have reported using several means of transport on a visit to the region.

Regional Demographics

Gender

	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Domestic								
Male	47,000	51%	47,500	52%	53,500	52%	52,500	50%
Female	45,500	49%	43,000	48%	48,500	47%	51,500	50%
Total	92,500	100%	90,500	100%	102,500	100%	104,000	100%
International								
Male	4,700	47%	5,400	47%	4,600	54%	5,200	55%
Female	5,400	53%	6,100	53%	3,800	45%	4,200	45%
Total	10,100	100%	11,500	100%	8,500	100%	9,400	100%
Total								
Male	51,700	50%	52,900	52%	58,100	52%	57,700	51%
Female	50,900	50%	49,100	48%	52,300	47%	55,700	49%
Total	102,600	100%	102,000	100%	111,000	100%	113,400	100%

Note: Percentages may not add up to total due to rounding

Age Group

	Annual Average 2002 & 2003		Annual Average 2003 & 2004		Annual Average 2004 & 2005		Annual Average 2005 & 2006	
	Visitors	%	Visitors	%	Visitors	%	Visitors	%
Domestic								
15-24	7,000	8%	7,500	8%	8,500	8%	9,500	9%
25-44	40,500	44%	38,500	43%	46,500	45%	46,000	44%
45-64	31,500	34%	27,000	30%	30,000	29%	33,000	32%
65+	13,500	15%	18,000	20%	17,500	17%	15,000	14%
Total	92,500	100%	90,500	100%	102,500	100%	104,000	100%
International								
15-24	1,100	11%	600	5%	600	7%	900	10%
25-44	3,200	32%	4,700	41%	4,800	56%	3,600	38%
45-64	4,400	44%	5,100	44%	2,500	29%	4,000	43%
65+	1,400	14%	1,000	9%	500	6%	800	9%
Total	10,100	100%	11,500	100%	8,500	100%	9,400	100%
Total								
15-24	8,100	8%	8,100	8%	9,100	8%	10,400	9%
25-44	43,700	43%	43,200	42%	51,300	46%	49,600	44%
45-64	35,900	35%	32,100	31%	32,500	29%	37,000	33%
65+	14,900	15%	19,000	19%	18,000	16%	15,800	14%
Total	102,600	100%	102,000	100%	111,000	100%	113,400	100%

Note: Percentages may not add up to total due to rounding

Survey Methodology

National Visitor Survey (NVS)

Telephone interviews are conducted with Australian residents aged 15 yrs and over that have travelled in Australia in a given year, for any purpose. Respondents are contacted at home via a telephone interview. These interviews are undertaken continuously throughout the year, with approximately 120,000 conducted in the past year. Respondents are asked for details of overnight trips that they have returned from in the past 4 weeks, day trips they have taken in the past week, and overseas trips they have returned from in the past three months.

International Visitor Survey (IVS)

The IVS is conducted on behalf of the Tourism Research Australia by ACNielsen Research Pty Ltd. Interviews are conducted with short term international visitors (that is, duration of stay of less than 12 months) aged 15 years or older at Australia's major international airports: Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide and Darwin. Approximately 40,000 interviews were conducted last year.

Tourism Research Australia, International Tourism Expenditure Research Programme

This research programme involves the application of a modelling approach to the IVS unit record data in order to produce regional expenditure estimates. For more information about the programme, please refer to the Tourism Research Australia's "Tourism, Expenditure by International Visitor's in Australia's Regions"

Tourism Research Australia, Domestic Tourism Expenditure Research Programme

This research programme involves the application of a modelling approach to the NVS unit record data in order to produce regional expenditure estimates. For more information about the programme, please refer to the Tourism Research Australia's "Tourism, Expenditure by Domestic Visitor's in Australia's Regions"

Reliability of Information

All figures in this publication are estimates based on the sample surveyed and as such are subject to some degree of uncertainty as indicated by the size of the confidence interval associated with the estimate which may affect the change in estimate year on year. This publication includes two and four year rolling average figures, meaning we add two individual years and divide by two to provide a more reliable estimate.

Disclaimer:

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Other Research

You can find these publications in the Research and Statistics section of our corporate website www.tourism.wa.gov.au

You can contact us at research@westernaustralia.com or by visiting the Contact Us section of the corporate website. If you would like to receive updates when new publications are available, please visit the Contact Us section of the corporate website and tick the box for email updates.

QUARTERLY RESEARCH

Quarterly Tourism Snapshot

This presentation provides an overview of the latest intrastate, interstate and international visitor information. Statistics include visitors, visitor nights, expenditure, long term trends, comparisons on the previous 12 months, origin and much more. These presentations are updated on a quarterly basis as data is received.

REGIONAL RESEARCH

New Tourism Region Fact Sheets– 2006

Each of the five Regional Tourism Perspective's profile the international and Domestic markets to the region, including a summary of visitor numbers, trends, characteristics, demographics, activities, accommodation, comparison, local government area and economic contribution information, plus much more. If you are interested in information about a particular region in the State, these publications will give you a detailed overview.

Regional Development Commission Boundary Fact Sheets – 2006

The Fact Sheets profile Domestic and international visitors within specific Regional Development Commission boundaries.

Local Government Area Fact Sheets – 2006

The Fact Sheets profile Domestic and international visitors to specific Local Government Areas (LGA) within Western Australia. Customised LGA Fact Sheets are available for purchase, subject to the availability of data. For more information please contact research@westernaustralia.com

DOMESTIC RESEARCH

Intrastate Visitor Review

This intrastate review provides an overview of the intrastate market in Western Australia. Statistics include visitor numbers, nights, expenditure and purpose of visit. Other information relates to demographics, seasonality, transport used, accommodation, leisure activities and more.

Interstate Visitor Review

This interstate review provides an overview of the interstate market in Western Australia. Statistics include visitor numbers, nights, expenditure and purpose of visit. Other information relates to origin of visitors, demographics, seasonality, transport used, accommodation, leisure activities and more.

Day Trip Visitor Review

This day trip review provides an overview of the Domestic day trip market in Western Australia. Statistics include visitor numbers, expenditure and purpose of visit. Other information relates to demographics, seasonality, transport used, leisure activities and more.

INTERNATIONAL RESEARCH

International Visitor Review

This publication provides a great overview of the international market into Western Australia. Inside you will find statistics on key international markets throughout the world. Statistics include;

- Visitor profiling (visitors, nights, expenditure and length of stay etc.)
- Visitor characteristics (influence to come, first visit or return, accommodation used etc.)
- Demographics and locations visited.

Market Profiles – 2004

The market profiles contain a comprehensive analysis of 21 countries throughout the world. Inside you will find an environmental analysis (demographic, political, economic, social and technological) as well as an external analysis (customers, segmentation, competitors, market dimensions, distribution channels and suppliers).

The reports are available on request to members of the WA Tourism Industry and other WA stakeholders. To request a copy of any of the Market Blueprints please contact the Research Department, providing your business details.

Countries Available: Australia, Singapore, Malaysia, Japan, China, Taiwan, Hong Kong, Thailand, India, UK, Germany, Italy, France, Scandinavia, Switzerland, Netherlands, South Africa, United Arab Emirates, New Zealand, Canada and USA.

Market Blueprints – 2006

The Market Blueprints are a strategic marketing overview of each market which would be of use to industry operators and stakeholders who are either actively targeting these markets or considering doing so.

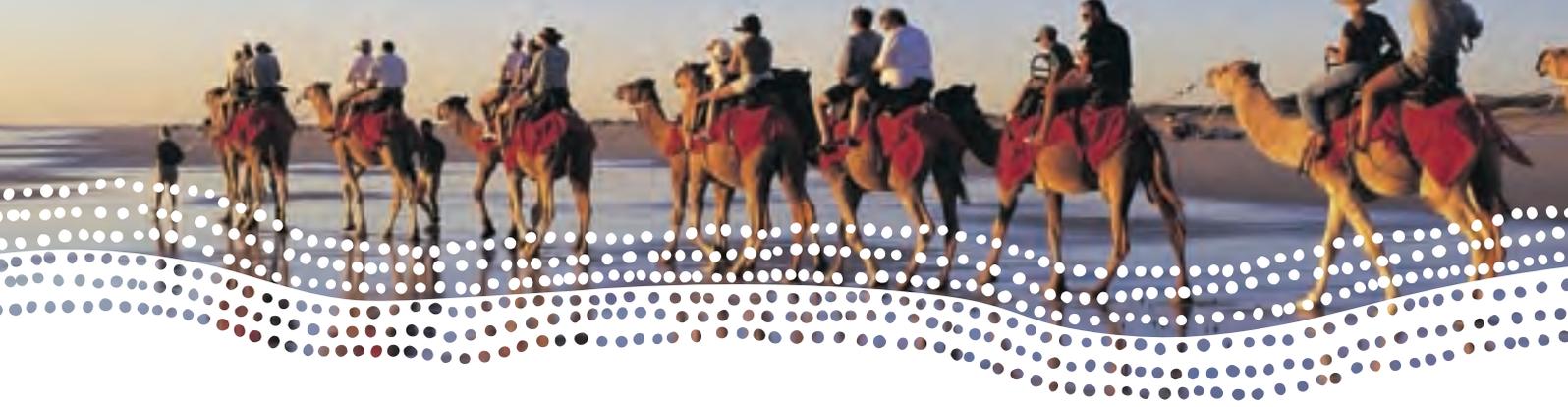
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Markets available: China/Hong Kong, Central Europe, Interstate, Intrastate, Japan, Korea, Malaysia, New Zealand, Singapore, UK/Ireland

CONSULTANCY

The Research team source statistical and survey information from a variety of reputable sources and can undertake specific consultancy services on behalf of your organisation; the current rate is \$77 an hour including GST. Enquires can be made by contacting the Research Department. Ph: (08) 9262 1700



Tourism Profiles for Local Government Areas in Regional Australia Western Australia

DENMARK SHIRE

SUMMARY OF INTERNATIONAL AND DOMESTIC TRAVEL TO LOCAL GOVERNMENT AREA

Three or four year average to June 2007

	International	Domestic ov	ernight	Domestic day
Visitors ('000)	10		97	86
Visitor nights ('000)	27		306	-
Spend (\$million)	1		31	6
Average stay (nights)	2.7		3.2	-
Average spend per trip (\$)	110		316	68
Average spend per night (\$)	40		100	-
State average				
Average stay (nights)	25.3		4.7	-
Average spend per trip (\$)	2 165		543	95
Average spend per night (\$)	86		116	-
National average				
Average stay (nights)	28.5		3.9	-
Average spend per trip (\$)	2 758		500	94
Average spend per night (\$)	97		127	-

SUMMARY OF TOURISM BUSINESSES IN LOCAL GOVERNMENT AREA

As at June 2007

Tourism businesses	Number	%	State average %	National average %
Non-employing businesses	87	52	51	50
Micro businesses (1-4 employees)	42	25	25	27
Small businesses (5-19 employees)	36	21	17	16
Medium to large businesses (20 or more employees)	3	2	7	7
TOTAL BUSINESSES	168	100	100	100

DENMARK SHIRE

BASIC PROFILE OF INTERNATIONAL TRAVEL TO LOCAL GOVERNMENT AREA

Three year average to June 2007

Characteristics	International visitors (‘000)%%%(‘000)%%%	State average	National average	Visitor nights	State average	National average
First or return visit						
First	3 34 36 41 9 33 38 45					
Return	7 66 64 59 18 67 62 55					
Top markets						
United Kingdom	4 36 26 13 12 44 23 16					
Germany	1 13 4 3 3 10 4 4					
Purpose						
Holiday/leisure	9 93 57 58 22 80 35 35					
Visiting friends/relatives	1 7 33 33 4 15 27 23					
Other	nnpn 24 29nnpn 39 42					
Accommodation						
Hotel, resort, motel or motor inn	3 29 50 60 6 20 13 17					
Caravan park or commercial camping ground	3 29 9 6 7 24 5 3					
Friends or relatives property	1 9 36 37 6 21 32 27					
Backpackers	1 12 13 10 2 8 9 9					
Other	2 21 19 21 7 26 41 43					
Top activities						
Eat out	8 81 92 89----					
Go to the beach	7 75 67 62----					
National Parks/State Parks	6 65 57 45----					
Bushwalking/rainforest walks	6 60 29 25----					
Duration of visit						
1-2 nights	7 71 8 6----					
3-4 nights	2 16 16 16----					
5 nights or more	1 13 77 78----					
Age						
15-44 years	5 47 55 59 14 53 70 75					
45-64 years	4 42 35 33 10 35 22 19					
65 years and over	1 11 10 7 3 12 8 6					

DENMARK SHIRE

BASIC PROFILE OF INTERNATIONAL TRAVEL TO LOCAL GOVERNMENT AREA

(continued)

Characteristics	International visitors (‘000)%%(‘000)%%%	State average	National average	Visitor nights	State average	National average
Travel party						
Unaccompanied traveller	3 34 51 50 13 49 68 70					
Adult couple	5 53 28 26 11 41 19 16					
Family and/or friends/ relatives	1 12 18 20 3 10 12 13					
Other	nnpn 3 4nnpn 1 1					
TOTAL	10 100 100 100 27 100 100 100					

DENMARK SHIRE

DETAILED PROFILE OF DOMESTIC OVERNIGHT TRAVEL TO LOCAL GOVERNMENT AREA

Three year average to June 2007

Characteristics	Overnight visitors ('000)%%('000)%%	State average	National average	Visitor nights	State average	National average
Origin						
Interstate	npnp 18 33	npnp 34 48				
Intrastate	87 90 82 67 287 94 66 52					
Top markets						
Perth	55 57 46 5 184 60 38 6					
Other Western Australia	32 33 36 3 103 34 28 4					
Other Victoria	npnp 1 9npnp 3 8					
Other Queensland	npnp 2 12npnp 4 13					
Purpose						
Holiday/leisure	59 61 43 43 201 66 44 47					
Visiting friends/relatives	26 27 32 35 85 28 27 32					
Business	npnp 21 19npnp 21 15					
Other	npnp 7 6npnp 8 6					
Accommodation						
Hotel, resort, motel or motor inn	24 25 32 36 47 15 22 27					
Rented house, apartment, flat or unit	10 10 7 7 33 11 9 9					
Caravan park or commercial camping ground	12 12 9 7 50 16 13 10					
Friends or relatives property	31 32 41 42 107 35 35 39					
Caravan or camping near road or on private property	npnp 6 4npnp 6 4					
Other	14 15 13 10 55 18 16 11					
Transport						
Air	npnp 21 21----					
Private car	82 85 74 73----					
Other	14 15 8 8----					

DENMARK SHIRE

DETAILED PROFILE OF DOMESTIC OVERNIGHT TRAVEL TO LOCAL GOVERNMENT AREA

(continued)

Characteristics	Overnight visitors (‘000)%%(‘000)%%%	State average	National average	Visitor nights	State average	National average
Top activities						
Eat out/restaurants	51 52 50 52----					
Go to the beach	47 48 28 24----					
Just walk or drive around	45 47 30 28----					
Visiting friends/relatives	42 43 45 45----					
Bushwalking/rainforest walks	30 31 11 9----					
National Parks/State Parks	28 29 10 8----					
Duration of visit						
1 night	27 28 25 28----					
2 nights	23 24 25 26----					
3-4 nights	29 30 24 24----					
5-9 nights	14 14 16 15----					
10 nights or more	npnp 11 8----					
Stopovers						
Destination was only stopover	60 62 86 89----					
Trip included multiple stopovers	36 38 14 11----					
Age						
15-24 years	npnp 16 17npnp 14 15					
25-44 years	40 41 39 38 128 42 35 33					
45-64 years	33 34 34 34 98 32 33 34					
65 years and over	15 16 12 12 55 18 18 18					
Lifecycle group						
Young midlife single	14 15 18 20 40 13 16 18					
Young midlife couple	17 17 15 14 44 14 14 12					
Parent with youngest child under 6	11 11 14 13 46 15 12 12					
Parent with youngest child 6 or more	13 14 21 22 39 13 18 20					
Older working	18 19 16 15 56 18 15 14					
Older non-working	24 25 16 16 80 26 24 24					

DENMARK SHIRE

DETAILED PROFILE OF DOMESTIC OVERNIGHT TRAVEL TO LOCAL GOVERNMENT AREA

(continued)

Characteristics	Overnight visitors	State average	National average	Visitor nights	State average	National average
	('000)	%%('000)%%	%%('000)%%		%%('000)%%	%%('000)%%
Travel party						
Travelling alone	10 10 25 26 33 11 23 23					
Adult couple	39 40 27 28 112 37 31 31					
Family group - parent(s) and children	19 20 20 21 75 24 19 22					
Friends/relatives travelling together	23 24 20 19 78 26 17 18					
Other	npnp 9 7npnp 9 6					
Quarter returned home						
March	32 33 26 27 126 41 24 30					
June	26 27 25 25 73 24 24 23					
September	20 21 24 23 50 16 26 24					
December	19 19 25 25 57 19 25 24					
TOTAL	97 100 100 100 306 100 100 100					

DATA SOURCES:

Tourism Research Australia International Visitor Survey (unpublished) and National Visitor Survey (unpublished)
Australia Bureau of Statistics, ABS Business Register (unpublished)

CONTACT DETAILS:

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PO Box 1110, Belconnen ACT 2616
Telephone: + 61 2 6228 6100 Facsimile: + 61 2 6228 6180 Email: tra@tourism.australia.com

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ABN 99 657 548 712

1 Purpose

This bulletin sets out the interim policy of the Western Australian Planning Commission (WAPC) to implement the recommendations of the Tourism Planning Taskforce (the taskforce). The interim policy will guide decision-making by the WAPC and local government on subdivision, development and scheme amendment proposals for tourism purposes in the short term while detailed planning mechanisms are being established, including the preparation of a state planning policy. The full report of the taskforce is available on the Department for Planning and Infrastructure (DPI) website at <http://www.dpi.wa.gov.au/cityregionalplanning/1689.asp> and should be read in conjunction with this interim policy.

2 Background

The taskforce was established by the Hon Alannah MacTiernan MLA, Minister for Planning and Infrastructure, in September 2002 to address the increasing practice of using tourist zoned land for residential development and the effect of strata schemes on tourism developments. Concerns relate to the ongoing operation of strata titled tourist development, the potential conflict between short stay tourism and permanent residents, and the increase in the value of tourism zoned land which is displacing low key tourism uses such as caravan parks.

The taskforce was chaired by the Hon Adele Farina MLC, Member for South West Region and comprised representatives of the tourism and development industries, local government and government agencies with roles in planning and tourism.

The taskforce released its report for public comment in August 2003. Following consideration

of submissions, the final report was endorsed by the State Government in January 2006. The WAPC endorsed the taskforce recommendations in June 2006.

3 Recommendations of the Tourism Planning Taskforce

The taskforce made 26 recommendations. Those of particular relevance to planning are:

- The preparation of a state planning policy on land use planning for tourism as a primary mechanism to implement the taskforce recommendations.
- The preparation and approval by local government of specific tourism components in local planning strategies as a framework for decision-making on tourism proposals.
- The establishment of a committee to identify sites and locations of strategic tourism significance around the state, in consultation with local governments. Strategic tourism sites are those that are critical to the future growth and community benefit of tourism for the state as a whole and for specific regions and areas.
- Introduction of an extended range of definitions for tourism development with specific reference to length of stay provisions, to provide for consistency in the classification of different tourism activities. Definitions may include chalet, cabin, eco-tourist facility, farmstay, guesthouse, holiday home, lodge, tourist resort, serviced apartment, short stay accommodation and tourism development.
- Introduction of a range of tourism zones (ie caravan park and camping grounds, cabin and chalet, motel, hotel, tourist

resort, tourist accommodation and tourist investigation) and the permissibility of land uses in each zone.

- Length of stay provisions and use restrictions on tourist accommodation in tourism zones.
- The use of special control areas to introduce specific requirements in respect of strategic tourism sites or locations.
- Recognition of the use of strata schemes to finance tourism developments subject to specific requirements for integrated development and management.
- Referral of all local planning strategies and new or reviewed local planning schemes to Tourism WA for comment as part of the statutory consultation process.
- Referral of all scheme amendments, subdivision and survey strata applications impacting on land zoned for tourism purposes to Tourism WA for comment.

4 Strategic planning for tourism

Tourism is a significant contributor to local economies in Western Australia, particularly in regional areas, and a strategic approach to ensure the sustainable growth of the industry is important. The aim of a tourism component of a local planning strategy is to provide local government and the community with direction on tourism development by establishing a land use planning framework for tourism. The tourism component of a local planning strategy will need to address current and future demand, identify tourism sites and provide guidance on tourism development zones and infrastructure needs. It will also identify potential state strategic tourism sites or locations and

non-strategic tourism sites to meet projected demand in the locality. The strategy will be reflected through appropriate provisions in local planning schemes. This may involve local governments amending an existing scheme or incorporating provisions into a new scheme.

5 Strategic tourism sites

Strategic tourism sites are those of state significance, which display characteristics that set them apart from other tourism sites in terms of potential for tourism development and benefit to the tourism industry. Consequently, these sites will be for tourism purposes only and permanent residential use will not be permitted. In addition to existing land use planning and infrastructure requirements and constraints, the criteria (general location and site specific) for the identification of strategic tourism sites and locations is set out in detail in recommendation 4 of the taskforce report.

The general location criteria includes:

- ease of access;
- uniqueness;
- a setting or aspect that creates a tourism character and ambience;
- access to tourist activities and amenities such as tours, fishing and walking trails; and
- scarcity in that it may be the only opportunity, or one of a limited number of opportunities for a particular tourism experience.

The site specific criteria includes:

- suitability in a land use context;
- capability or capacity to be developed for tourism purposes;
- adequate size to accommodate a sustainable tourism facility; and
- perform a traditional social or cultural role, or serving a particular market.

Sites identified as non-strategic have an important tourism function, which is to be retained as the predominant use. To assist tourism and facilitate the development or redevelopment of sites, up

to 25 per cent of the units and developable land area may be used for residential purposes (no occupancy restriction on length of stay).

The task of the strategic tourism sites committee is to identify strategic tourism sites in consultation with local government, the tourism development industry and key stakeholders. The identified sites will be presented to the Minister for Planning and Infrastructure for endorsement and will be available for inspection with the state planning policy. Strategic tourism sites shall be designated in the relevant local tourism planning strategy and local planning scheme.

6 Interim policy on planning for tourism

The WAPC will have regard to the recommendations of the taskforce in planning decision-making. Tourism proposals or proposals with an impact on tourism, submitted to the WAPC and local governments will be expected to address the recommendations of the taskforce.

Strategic planning for tourism

The local tourism planning strategy will be a component of the local planning strategy. If it is necessary to prepare it in advance, it should be prepared with a view to subsequent incorporation into a local planning strategy for the local government area. Local tourism planning strategies prepared independently should follow the same procedure as the preparation and endorsement of a local planning strategy by the WAPC under the *Town Planning Regulations 1967*. This will allow the recommendations to be incorporated into a local planning strategy at a later date.

Local planning schemes

The preparation of new or amended local planning schemes should reflect the recommendations of the taskforce.

Scheme amendments

If the tourism component of a local planning strategy or a local tourism planning strategy has not been prepared, any scheme amendment proposal affecting tourism zoned

land should incorporate an assessment of the proposal against the relevant criteria specified in recommendations 2 and 4 in the taskforce report.

Where a site has been identified as a strategic tourism site in a WAPC endorsed local planning strategy, local tourism planning strategy or an amendment report, or the strategic sites committee has assessed it as such, the WAPC will not generally support an amendment that will facilitate permanent residential use.

Where a site is identified as a non-strategic tourism site in a WAPC endorsed local planning strategy or local tourism planning strategy or an amendment report, or the strategic sites committee has assessed it as such, the WAPC will generally only support the amendment if permanent residential development (no occupancy restriction) is limited to a maximum of 25 per cent of the area.

Where a local planning strategy, local tourism planning strategy or amendment report demonstrates that a site is no longer required in whole or part for tourism development because of a lack of demonstrated tourism demand or sustainable tourism function, and this is supported by the WAPC in consultation with Tourism WA, then the WAPC may support the amendment subject to all other relevant planning considerations.

Other planning processes

The WAPC will have regard to the requirements of this planning bulletin and the recommendations of the taskforce in the assessment of development guide plans, outline development plans and subdivision and strata applications on sites zoned for tourism purposes or with tourism potential. In assessing these proposals it is noted that these are still subject to detailed planning processes and relevant statutory requirements.

Local government should likewise have regard to this interim policy along with other relevant policy considerations in the preparation of scheme amendments and the assessment of delegated built strata applications and development applications for sites zoned for tourism purposes or sites with tourism potential.

Subdivision and strata subdivision

In assessing a subdivision application for land zoned for tourism purposes, the WAPC among other matters will have regard to whether the proposed lots will:

- facilitate the development of a sustainable tourism facility;
- provide for current and future tourism demand; and
- accommodate the necessary services, management and support facilities without compromising the character, development flexibility or tourism amenity of the site.

Strata schemes are an important component in the funding of tourist accommodation development. However, it is acknowledged that there are risks in the use of such schemes in achieving sustainable tourism developments unless particular management requirements are met. The requirements and criteria for strata schemes are set out in detail in recommendation 12 of the taskforce report and in Tourism WA's Attributes of Success document (www.westernaustralia.com). At a minimum, in considering any application for the strata subdivision of tourism developments, the WAPC and/or local government will require:

- a valid development approval issued by the local government which demonstrates that the development is designed as an integrated tourism facility;
- a construction and staging program which demonstrates that common facilities and viable management arrangements are provided for each stage; and
- inclusion of a management statement for the strata scheme to provide for integrated common management of the units for a minimum period of 25 years as a tourism facility.

Existing scheme provisions

On sites currently zoned for tourism purposes, where the provisions of the local planning scheme are inconsistent with this interim policy, the provisions of the scheme prevail. Notwithstanding, any proposed subdivision or development on these sites should address the

recommendations of the taskforce to ensure consistency with the intended planning framework.

Referral to Tourism WA

All proposals that impact on land zoned for tourism purposes or on land which has been identified as having tourism potential should be referred to Tourism WA prior to the WAPC or local government making a recommendation or determination. Proponents, consultants and local government are encouraged to discuss scheme amendments and developments for tourism proposals with Tourism WA prior to formal referral as part of the public advertising process by local government.

The DPI will ensure any local planning scheme, local planning strategy, scheme amendment, development guide plan or subdivision or strata application for tourism purposes or on land that has been identified as having tourism potential has been referred to Tourism WA for comment prior to making a recommendation or determination.

7 Further information

Further information on the interim policy and other matters set out in this planning bulletin can be obtained from:

Tourism Taskforce Coordinator
Regional Land Use and
Infrastructure
Department for Planning and
Infrastructure
469 Wellington Street
Perth WA 6000

Policy and Planning
Industry Development and Visitor
Servicing
Tourism Western Australia
2 Mill Street
Perth WA 6000

Please quote reference
801/01/01/0050P in all DPI
correspondence.

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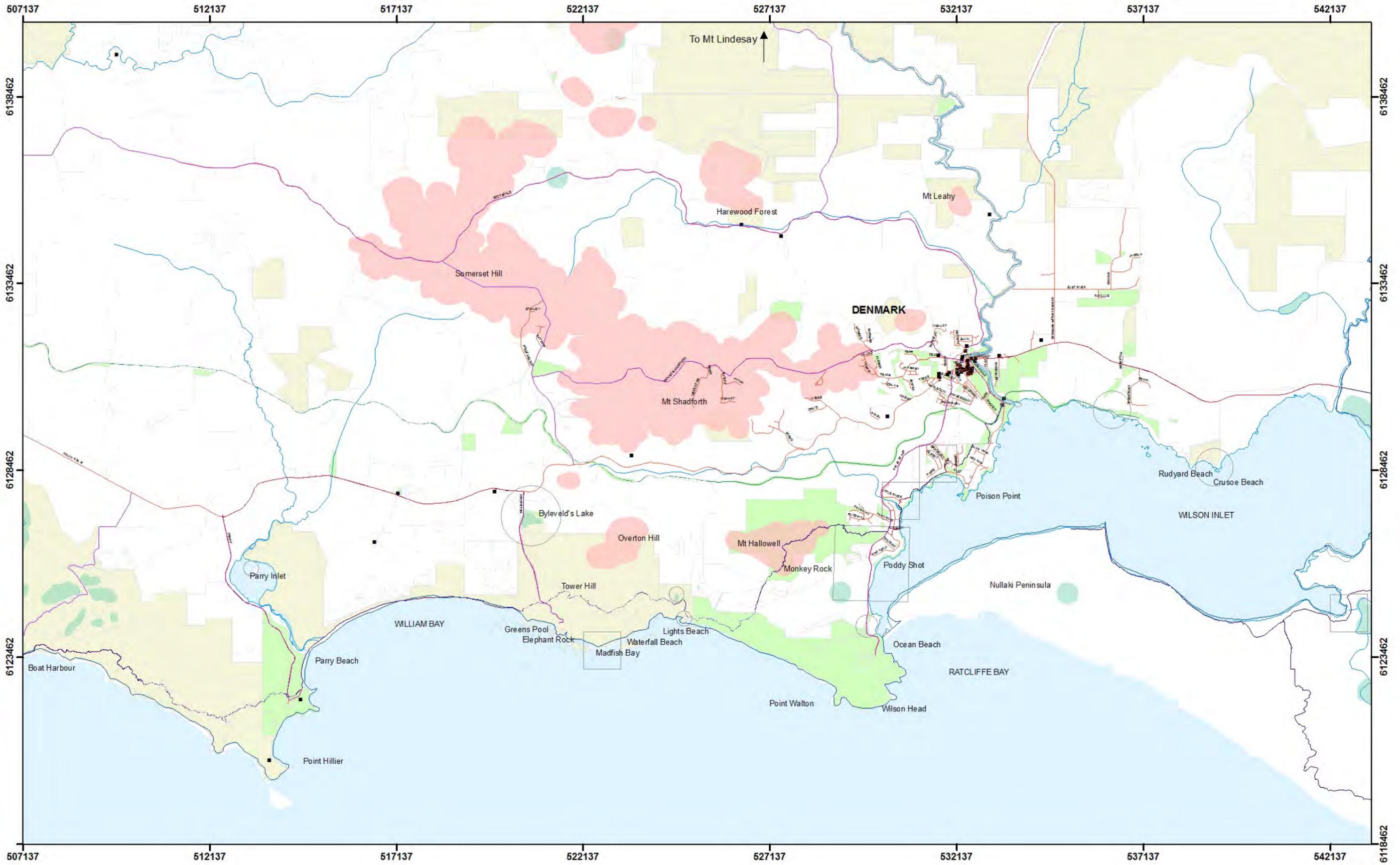
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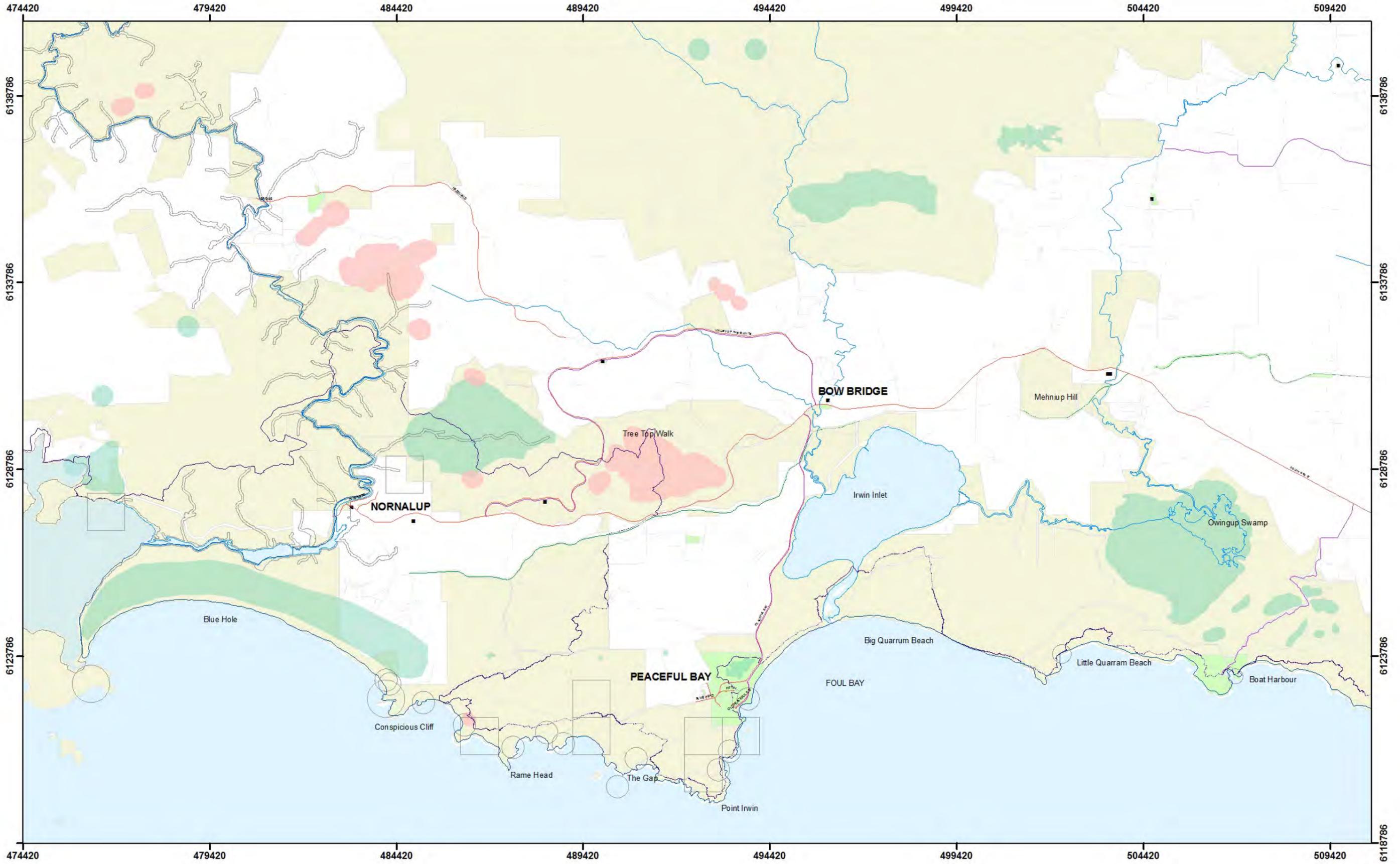
Features of Tourism Significance

Map 1 of 2

Legend

Shire of Denmark	Aboriginal Heritage Site	Shire Reserve	Land Above 160m
Tourism Route	Bibbulmun Track	DEC Managed Land	River
Sealed Road	Rail Trail	Significant Wetlands	Ocean and Estuarine
Unsealed Road	Place of Heritage Value	Note: Munda Biddi Trail alignment yet to be finalised by DEC	

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Features of Tourism Significance Map 2 of 2

Legend

Shire of Denmark	Aboriginal Heritage Site	Shire Reserve	Land Above 160m
Tourism Route	Bibbulmun Track	DEC Managed Land	River
Sealed Road	Rail Trail	Significant Wetlands	Ocean and Estuarine
Unsealed Road	Place of Heritage Value	Note: Munda Biddi Trail alignment yet to be finalised by DEC	

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