
Economic Development Strategy

2009

Shire of Mundaring



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Definitions

In this Economic Development Strategy the following definitions have been used:

Mundaring	The physical place within the geographic boundary of the Shire of Mundaring Local Government. Unless specified it refers to the whole of the Shire of Mundaring, not the town site of Mundaring.
Council	The collective body of elected members of the Shire (the Shire President and councillors).
Shire	The organisation, comprising councillors and staff, which has responsibility for administering Mundaring in accordance with the Local Government Act.
Community	All people who live in, work in and/or visit Mundaring.
Eastern Metropolitan Regional Council (EMRC)	The Regional Council, comprising six member local governments: the Shires of Mundaring and Kalamunda; Cities of Swan, Bayswater and Belmont; and Town of Bassendean.

SECTION 1 – EXECUTIVE SUMMARY

1 Executive Summary

1.1 Purpose

The Shire of Mundaring's vision is for "a vibrant community that provides opportunities and support for people to enjoy a rich mix of sustainable hills lifestyles". This Strategy, the first Economic Development Strategy (EDS), has been produced to support the delivery of that vision by ensuring that a comprehensive and effective economic development structure is implemented, supported by clearly identified objectives, strategies and actions plans.

In achieving its vision the Shire has undertaken to uphold the following values:

- **Excellence in Customer Service**
Building the relationship by effectively meeting the needs of internal and external customers
- **Innovation and Continuous Improvement**
Willing to listen and try new ideas to do things better
- **Integrity, Respect and Team Spirit**
Working with the community and each other in a fair, honest and respectful manner

The range of action plans within this Economic Development Strategy address sustainable development, marketing, employment, transport, tourism, business development and business support; whilst retaining the essential and unique characteristics of the hills lifestyle.

Sustainable increased levels of investment and growth in business, tourism, employment and population will enable the Shire to provide the services required by residents and ensure future financial stability. To facilitate such growth the EDS will contribute to the achievement of the Shire of Mundaring Strategic Plan 2007–2010 objectives 1 and 2:

- **Key Strategic Objective 1**
Encourage environmentally sustainable development
- **Key Strategic Objective 2:**
Increase business and employment opportunities in the Shire of Mundaring

The Shire has a strong focus on environmental, social and financial sustainability; managing growth and development in order to preserve the unique environmental characteristics of the hills lifestyle, whilst sustaining and developing our workforce and their opportunities, which are key elements within this Strategy.

The recent global economic changes reinforce the need for effective economic strategies. With changes in security and availability of employment already starting to affect our resident workforce, changes to superannuation and retirement investments affecting our seniors, house sales slowing and property prices dropping, this Strategy takes a medium to long term view to support economic stability and growth within Mundaring.

1.2 Development Methodology

This Economic Development Strategy (EDS) has been developed by the Community Services group of the Shire of Mundaring with additional input from a range of stakeholders including the Shire of Mundaring Business Advisory Group, Eastern Metropolitan Regional Council (EMRC), Mundaring Tourism Association, Eastern Hills Business Association, Department of Environment and Conservation, Mundaring & Hills Historical Society and the National Trust. The development of the Strategy has included:

- Review of the existing strategies and policies within the Shire of Mundaring
- Review of economic development strategies and practices in place within Australia and overseas

- Baseline analysis of the existing demographic and economic development situation within the Shire of Mundaring
- Identification of the key initiatives, opportunities and inhibitors affecting the potential for economic development in Mundaring
- Consultation with stakeholders including the Shire of Mundaring Business Advisory Group, Mundaring Tourism Association, Eastern Hills Business Association, EMRC, Shire Services and other relevant stakeholders
- SWOT analysis workshops

1.3 The Shire of Mundaring's Current Position

When speaking with community members it is obvious just how precious the hills lifestyle and Mundaring's unique character are, however without support and improvement the characteristics of Mundaring and its population will change and may be lost or unsustainable. This EDS aims to pre-empt decline and promote ways to maintain and improve the economic environment with minimal detrimental effect on the natural environment.

Research and analysis was conducted into the following aspects of the Shire of Mundaring:

- Location
- Composition of the Shire and Major Features
- History and Growth
- Transport and Communications
- Business and Economic Partnerships
- Economic Development Inhibitors
- Population – Age and Distribution Profile
- Population Projections to 2021
- Housing Tenure
- Employment and Occupations
- Employment by Industry
- Resident's Income
- Internet and Computer Use
- Building and Land Development
- Residential, Commercial and Industrial Property Sales
- Business Activity
- Tourism
- Rural Industries

The full results of that research and analysis are contained within section 2 of the Strategy. By following the development methodology as described in section 1.2 (above) key factors that shape the Strategy became apparent, reflecting the important issues faced by the Shire of Mundaring which are:

- Limited land availability for future residential and commercial development.
- Lack of infrastructure to support environmentally acceptable residential development.
- Declining population growth with an ageing population.
- Poor access to public transport.
- Lack of new industry and commerce due to factors including scarcity of land, infrastructure, and support for new business and investment.
- Insufficient tourism accommodation, services and marketing. Limited strategic, development and marketing of Mundaring as a tourism destination. Limited effectiveness of the visitor centre due to location and facility constraints.

- Insufficient tourism emphasis placed on the Shire’s significant heritage and cultural assets.
- Business development and the attraction of new business to Mundaring is insufficiently supported.
- Lack of promotion and marketing of Mundaring to attract new investment and inwards skills migration.
- A high proportion of residents work outside of Mundaring whilst the majority of our workforce resides outside of Mundaring.
- Post high-school access to education and training opportunities is limited within Mundaring.

The consultations that have taken place in the preparation of this Economic Development Strategy have identified not only these challenges but also many potential solutions to them which have been incorporated into the objectives and strategies described within section 3 of the strategy document.

1.4 Themes and Objectives

From the development process the key strategic objectives outlined in the Strategy are organised under the 7 key themes:

Theme 1	Development
Objective 1.1	Encourage sustainable development and effective land use.
Theme 2	Marketing and Branding
Objective 2.1	Develop a comprehensive marketing strategy for the Shire of Mundaring.
Theme 3	Employment and Skills Development
Objective 3.1	Foster the development of a sustainable local labour market that meets the employment needs of ratepayers and local businesses.
Theme 4	Transport
Objective 4.1	Improve access to public transport within the Shire of Mundaring.
Theme 5	Tourism
Objective 5.1	Develop and promote the tourism industry within the Shire of Mundaring in order to achieve greater tourism yield.
Theme 6	Business Development
Objective 6.1	Actively promote and support the development of business and industry within the Shire of Mundaring to meet the demands and expectations of the local economy.
Theme 7	Business Support and Facilitation
Objective 7.1	Provide business support and facilitation.

1.5 Actions

A series of strategies has been developed to achieve each objective. Action plans for each strategy will be scheduled for implementation of the Strategies over a five year period.

Budgetary estimates have been allocated to each strategy. Many will be achieved within existing resources, some will require additional financial resources, and some will need to be scoped further to determine the financial resources required.

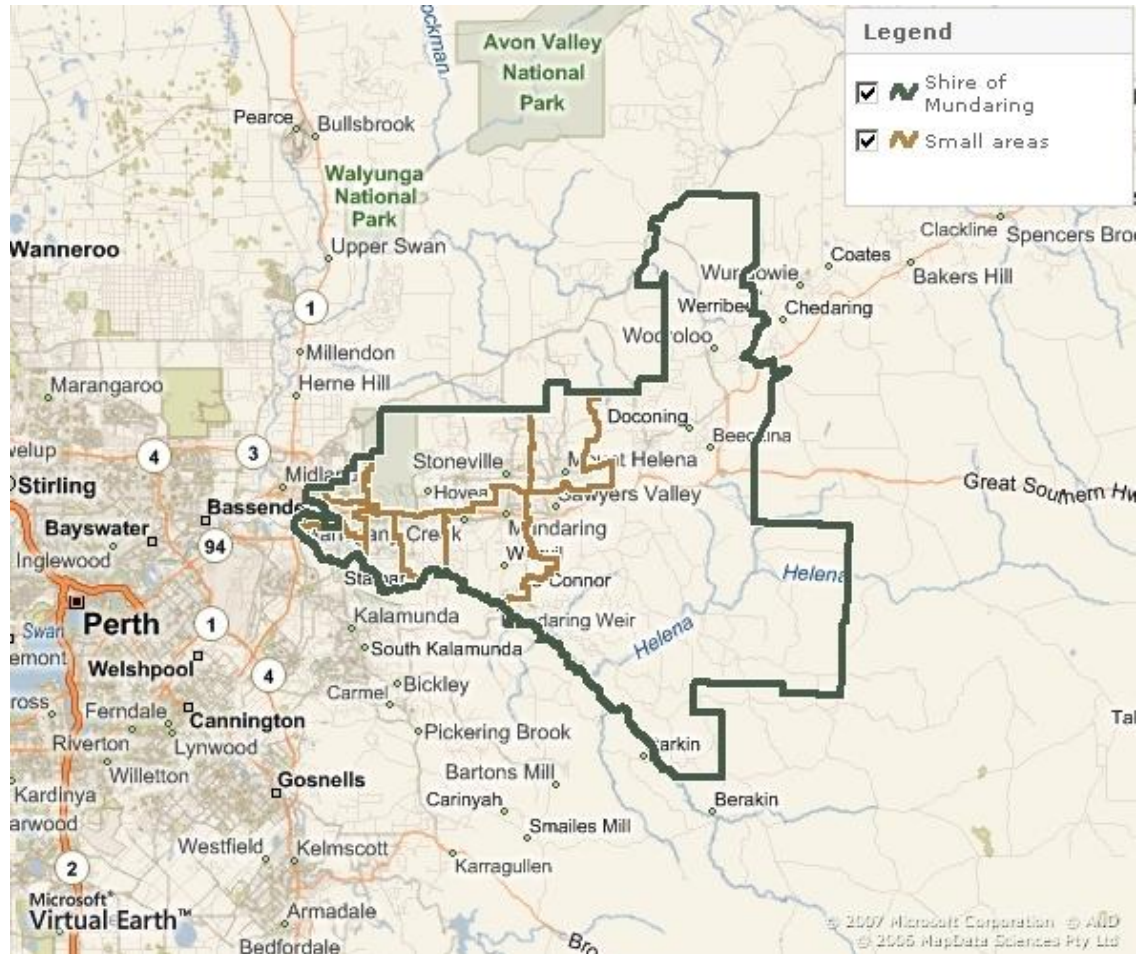
SECTION 2 – RESEARCH & ANALYSIS

2 Shire of Mundaring Profile

2.1 Introduction

This section provides an overview of the Shire of Mundaring. The location and geography of Mundaring is described in terms of its composition and relationship to Perth and other significant centres. Population, labour force characteristics, business and tourism structures are considered in relation to its economy, future development and sustainability. Trends in the property markets are examined taking into account residential, commercial and industrial availability, sales levels and pricing.

Shire of Mundaring Map



Shire of Mundaring: Land Area: 64,279 hectares Density: 0.53 people per hectare (2006)

Source: Profileid – Shire of Mundaring

Note: The research materials and analysis contained within this document are historical and should be viewed taking into consideration the significant changes to the Global and Australian economies that have taken place through the latter part of 2008.

3 Location and Description of the Shire of Mundaring

3.1 Location

The Shire of Mundaring is located on the eastern fringe of Perth, Western Australia, approximately 35km from the Perth GPO. It is bounded by the Shire of Toodyay in the north, the Shires of Northam and York in the east, the Shire of Kalamunda in the south and the City of Swan in the west and north-west.

3.2 Composition of the Shire and Major Features

Encompassing a total land area of 644 square kilometres, of which nearly half is National Park, State Forest or water catchments, the Shire of Mundaring is a predominantly rural area, comprising a number of townships and a mix of semi-rural hobby farms, lower-density rural use and public open spaces. The Shire administration centre is located at Mundaring, the principal township, whilst the other townships comprise the villages and rural localities of Bailup, Beechina, Bellevue (part), Boya, Chidlow, Darlington, Glen Forrest, Gorrie, Greenmount, Helena Valley, Hovea, Mahogany Creek, Malmalling, Midvale (part), Mount Helena, Mundaring, Parkerville, Sawyers Valley, Stoneville, Swan View (part), The Lakes and Wooroloo.

The following table lists the distances between the townships and Mundaring.

Town	Distance (km)	Town	Distance (km)
Bailup	23	Mahogany Creek	4.5
Beechina	15.5	Malmalling	18
Bellevue	14	Midvale	14
Boya	10.2	Mount Helena	5.5
Chidlow	10.7	Parkerville	3.5
Darlington	9.3	Sawyers Valley	3
Glen Forrest	6.9	Stoneville	2.5
Gorrie	14	Swan View	11.5
Greenmount	10.6	The Lakes	15
Helena Valley	12.8	Wooroloo	18
Hovea	7.2		

Table: Distance from Mundaring (straight line)

Major features of Mundaring include the Mundaring National Park, Greenmount National Park, John Forrest National Park, Mundaring Weir, Lake C Y O'Connor, Lake Leschenaultia, Leschenaultia Conservation Park, Chidlow Recreation Reserve, Railway Reserves Heritage Trail, Munda Biddi Bike Trail, Perth Hills National Parks Centre and a variety of wineries.

3.3 History and Growth

The original inhabitants of the Mundaring area were the Nyungar Aboriginal people and the name 'Mundaring' is thought to come from an Aboriginal word meaning "a high place on a high place" or "the place of the grass tree leaves". European settlement dates from the 1840s with the land initially being used mainly for timber-cutting, quarrying, vineyards, orcharding and poultry farming.

Population was minimal until the 1880s, with villages established mainly along the railway line and the Great Eastern Highway. Growth took place during the late 1800s and into the early 1900s aided by the construction of the Mundaring Weir, with the most significant development occurring in the post-war years, particularly during the 1970s and 1980s. The population grew from approximately 9,000 in 1966 to 26,000 in 1986 then growth began to slow from the early 1990s, with the population increasing from 29,000 in 1991 to 34,000 in 2006. Whilst the bulk of the population live in the townships, for many people the natural hills environment provides opportunities for larger rural blocks affording greater privacy and peace.

3.4 Transport & Communications

The Shire of Mundaring is served by the Great Eastern Highway, the major east west transport route between Western Australia and the Eastern States, and the Great Southern Highway. The Great Southern Highway branches off the Great Eastern Highway in the east of the Shire at The Lakes following a south easterly route through the rich agricultural wheatbelt and sheep farming areas of Western Australia before ending near Cranbrook, close to Albany. In addition the Shire has a comprehensive minor road network.

Carrying virtually all the road transport from Perth and Western Australia to Central, Southern and Eastern Australia, the Great Eastern Highway is of immense economic importance not only to the Shire but also the State. This traffic passing through Mundaring could be considered an economic opportunity rather than simply an ecological threat.

The nearest rail service terminates at Midland (16 km from Mundaring) providing a regular service to Perth CBD and other Transperth network destinations including links to interstate rail destinations. Air travel and freight transport is provided at Perth International and Perth Domestic Airports, both of which are located approximately 26 km from Mundaring, whilst the nearest sea access is through the Port of Fremantle (50 km from Mundaring) which is the major commercial port for Western Australia.

During consultation (BAG Mar 08)¹, transport provision within Mundaring, particularly to the smaller townships and outlying areas, has been raised as a significant issue and inhibitor. Public transport is limited to a bus service (Transperth) which provides a minimal service during peak periods with negligible provision throughout the rest of the day or night. This lack of an efficient public transport is seen as inhibiting access to employment, particularly for people without or unable to afford private transport, and inhibiting to further education, both of which impinge on the economic future of Mundaring and its residents.

¹ Shire of Mundaring Business Advisory Group – March 08, SWOT analysis and discussion

3.5 Business, Industry and Economic Partnerships

Commercial and Industrial centres are located at Midvale Business Centre in Midvale and at Mundaring Trade Centre on the eastern edge of Mundaring township. In addition there are many small and home based businesses which provide a significant variety of trades, services and goods.

Tourism is an important industry throughout Mundaring with visitors enjoying the 'Hills Lifestyle' and a range of leisure activities. Tourist accommodation is provided by a variety of establishments including hotels, bed and breakfast, cabins, chalets and camp sites, and our visitors enjoy eating at the many restaurants, cafés, tea rooms and take away food outlets.

Rural land is used mainly for farming, there are also several wineries producing quality wines. Mundaring contains large tracts of native forests and some commercial softwood plantations. The native forests are primarily conservation areas managed by the Department of Environment and Conservation whilst the softwood plantations are managed and harvested commercially by the Forestry Products Commission.

The Shire of Mundaring is a member of the Eastern Metropolitan Regional Council (EMRC), a progressive and innovative regional local government working on behalf of 6 member Councils:

- Town of Bassendean
- City of Bayswater
- City of Belmont
- Shire of Kalamunda
- Shire of Mundaring
- City of Swan

The EMRC provides a range of services and its operations are governed by a Council consisting of 2 Councillors and 1 deputy from each member Council.

The EMRC Council works across 3 divisions:

- Corporate Services
- Regional Services
- Waste Management Services,

as well as a separate Resource Recovery Project unit.

The vision and mission of the EMRC complement and support those of the Shire:

Vision: To be a responsive and innovative leader in assisting Perth's Eastern Region to be a great place to live, work, play and do business.

Mission: The EMRC, by partnering with member Councils and other stakeholders, facilitates strategies and provides services for the benefit and sustainability of the region.

Within this document statistical references and comparisons between the Shire of Mundaring and the EMRC members are used to illustrate changes and trends in a regional context.

The Small Business Centre East Metro based in Midland and the Swan Chamber of Commerce provide economic advice, business start-up advice and other support for businesses within the Shire of Mundaring. In addition there are three groups; the Shire of Mundaring Business Advisory Group (BAG), the Mundaring Tourism Association (MTA) and the Eastern Hills Business Association (EHBA), that provide support, information, advice and lobby on behalf of their members.

3.6 Economic Development Inhibitors

Mundaring has a unique natural environment affording residents a much sought after 'hills lifestyle', however these special characteristics need to be protected and supported which means that opportunities for new industrial and commercial development sites are limited and the types of economic activity that can be developed within the hills are restricted.

"While this does not mean that the development of housing, commercial premises and supportive infrastructure cannot happen, the Shire is confronted with real challenges in encouraging appropriate development. It needs to demonstrate a developed sensitivity to protecting the natural environment of this hills region at the same time as it encourages sustainable development"

Shire of Mundaring – Strategic Directions 2007 – 2010

4 Population – Age and Distribution Profile

4.1 Overview at 2006

Total Population	34,144 (ABS census 2006 – excluding overseas visitors)
Total Area	64,279 hectares
Population Density	0.53 people per hectare
Population Growth 2001-2006	863 (+2.6%)

4.2 Population - Growth 1991 - 2006

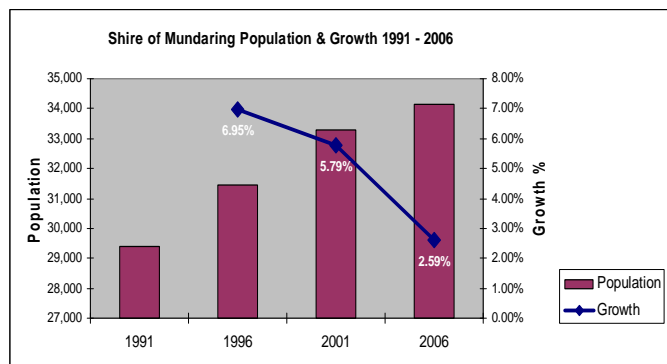
In 2006 the Shire of Mundaring had a total estimated resident population (place of usual residence) of 35,093 representing 12.65% of the EMRCs population (277,504) and 1.79% of the State's total population (1,959,088). (Note: Enumerated population figure from 2006 census differs from estimated resident population 2006 which includes people overseas on the census day, people who missed the count and double counting.)

Population Growth 1991 to 2006

	1991	1996	Growth 1991-1996	2001	Growth 1996-2001	2006	Growth 2001-2006
Mundaring	29415	31460	7.45%	33282	5.78%	34144	2.6%
EMRC	221728	239345	7.95%	257596	7.63%	273466	6.16%

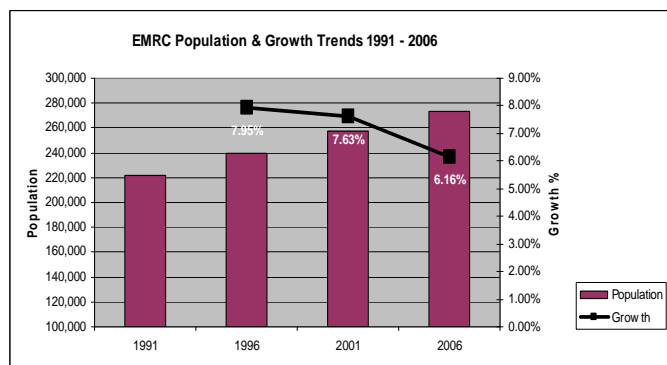
Source: ABS Census 1996, 2001, 2006

Whilst the population of Mundaring rose from 29,415 in 1991 to 34,144 in 2006, an overall increase of 4,729 (16.08%), the rate of population growth has shown a steady decline over the past 15 years, falling from 6.95% during 1991-1996, to 5.79% in 1996-2001, and to 2.59% for the period 2001-2006.



This represents a decline in the average annual growth rate (AAGR) from 1.34% per year during 1991-1996 to 0.51% per year during 2001-2006, a significant reduction compared to the changes within the EMRC AAGR of 1.54% 1991-1996 to 1.2% 2001-2006.

In comparison, over the same period, the EMRC population rose from 221,728 in 1991 to 273,466 in 2006, an overall increase of 51,738 (23.3%), and the EMRC experienced a smaller population growth rate drop from 7.95% (1991-1996) to 7.63% (1996-2001) and to 6.16% (2001-2006).

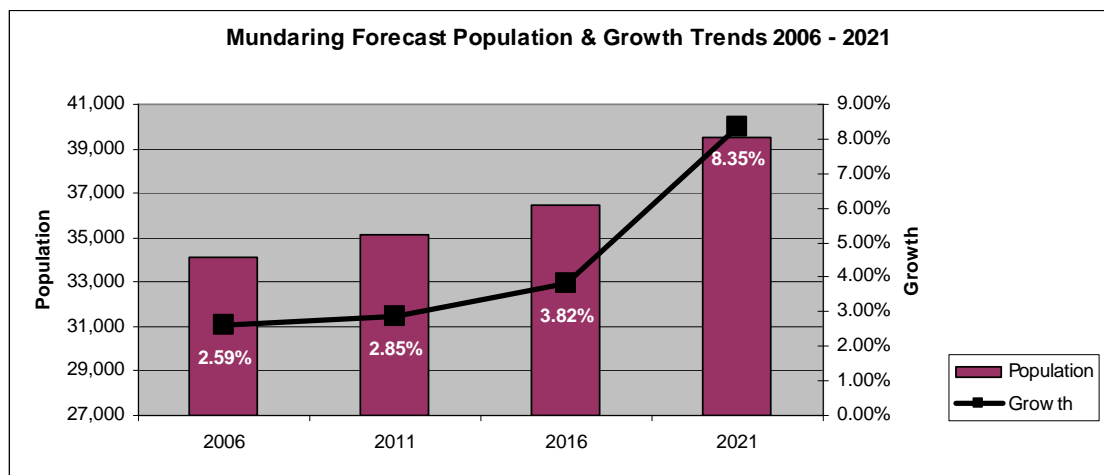


4.3 Population Projections 2006 to 2021

	2006	2011	Growth 2006-2011	2016	Growth 2011-2016	2021	Growth 2016-2021
Mundaring	34,144	35118	2.8%	36,461	3.82%	39,507	8.36%
City of Swan	96,923	111,671	15.2%	127922	14.6%	144,811	13.2%
Belmont City Council	29,850	34,184	4.5%	36,780	7.6%	38,401	4.4%

Source: Department for Planning and Infrastructure (2005.) WA Tomorrow Population Report No. 6 – 2006 base data adjusted to actual ABS census figure

The table above compares the forecast population growth within the Shire of Mundaring with that of neighbouring Local Government areas from the EMRC; the City of Swan and Belmont City Council.



Over the next 13 years (2008-2021) the Shire of Mundaring is forecast ² to experience a slight actual population growth from 34,144 to 39,507, with a steady increase in the rate of that growth from 2.8% growth (2006-2011) to 8.36% growth (2016-2021). However the composition of that population growth is expected to be primarily within the age groups 25-34 yrs and 65+ yrs.

² West Australian Planning Commission, "Western Australia Tomorrow", Population Report No.6

4.4 Population - Age Group Distribution

Shire of Mundaring		Population Age Group Distribution (%)				
Age Range	1996	2001	2006	2011	2016	2021
0-4 yrs	6.90	6.40	5.50	5.25	7.88	5.98
5-19 yrs	26.80	24.90	23.70	21.35	18.09	17.14
20-24 yrs	5.30	5.00	5.20	6.40	5.99	5.17
25-34 yrs	12.30	10.90	9.50	11.33	14.49	15.95
35-49 yrs	26.10	24.90	24.20	21.13	17.69	18.22
50-59 yrs	11.00	14.30	15.00	14.63	13.79	12.78
60-64 yrs	3.50	4.20	5.50	6.81	6.38	6.36
65 and over	8.40	9.50	11.10	13.10	15.68	18.39

Source: ABS Census 1996, 2001, 2006. Department for Planning and Infrastructure (2005) WA Tomorrow Population Report No.6 (Original projections within WA Tomorrow Population Report No 6 adjusted to reflect Census 2006 actual data whilst retaining year on year projected growth rates.)

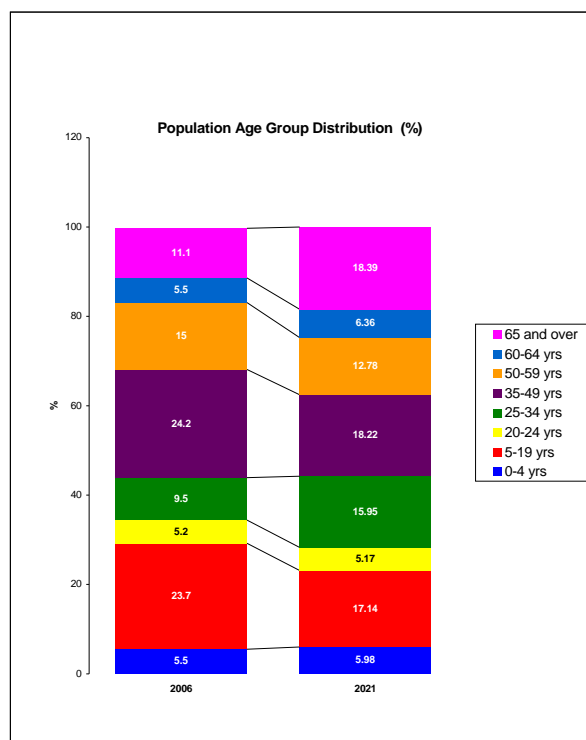
The above table and the following chart illustrate the forecast composition of the population of the Shire of Mundaring by age group for the period 2006 - 2021.

Forecast period 2006 to 2021

Age group 0-4 yrs shows a small overall increase peaking in 2016 at 7.88% before settling to a marginal increase of less than 0.5% by 2021. Taking this lack of development in young children's numbers into consideration with the continuing growth in the +65 yrs age group a significant ageing of the population by 2021 is forecast.

In addition to the 0-4 yrs age group showing little or no growth, the 5-19 yrs age group also shows a decline from 23.7% in 2006 to 17.14% in 2021. This decline could impact on the education and training provision requirements within the Shire, and have a flow-on effect on the number of new entrants to the workforce in the future.

Factors affecting the overall 0-19 yrs age groups could include housing costs and choices, employment, workforce qualifications, health and educational services provision.



Age group 25-34 yrs is predicted to rise significantly from 9.5% (2006) to 15.95% (2021), whilst age group 35-49 yrs shows a decrease from 24.2% to 18.2%. The combination of these groups represents a significant part of the potential workforce but maintains the 25-49 yrs overall group at 34.15% in 2021. When considered in conjunction with the previously mentioned fall in the 5-19 yrs age group this could indicate a potential future reduction in workforce numbers when the 5-19 yrs age group later become a major component of the working population.

Age group 50-59 yrs is forecast to show a slight decline from 15% to 12.78% whilst the 60-64 yrs group shows a very slight increase, however age group 65 yrs+ is forecast to grow from 11.1% to 18.39% in 2021.

4.5 Summary

The key workforce age group of 20-65 yrs shows little change other than a shift within its composition with more 25-34 yr olds and fewer 35-49 yr olds. This would appear to show the makeup of the workforce becoming younger, whilst at the other end of the spectrum there is forecast of a significant increase in the senior's age group 65 yrs and over, from 11.10% to 18.39% in 2021, which may have serious implications for health and welfare provision, and for the economic prosperity of the Shire. Strategies will be required to maintain the workforce, include encouraging families to live within the Shire. Such strategies would also require support to encourage business investment and necessitate sustainable residential and business development.

4.6 Population - Geographic Distribution

The Shire of Mundaring population is distributed between smaller townships and rural lots. (For the purpose of clarifying population changes some townships have been grouped in the following table.)

Town	Population 1996	Population 2001	Change 1996-2001	Population 2006	Change 2001-2006
Darlington	3539	3449	-2.54%	3339	-3.19%
Glen Forrest	2684	2816	4.92%	2756	-2.13%
Greenmount	2551	2414	-5.37%	2420	0.25%
Helena Valley Boya	2490	3345	34.38%	3230	-3.44%
Midvale Bellevue	1592	1464	-8.04%	1453	-0.75%
Mount Helena	2462	2701	9.71%	2773	2.67%
Mundaring Mahogany Creek	3363	3702	10.08%	3770	1.84%
Parkerville Stoneville Hovea	4232	4415	4.32%	4841	9.65%
Outer Eastern: Sawyers Valley Chidlow Wooroloo Lakes, Gorrie Malmalling Beechina, Bailup	3417	3803	11.3%	4502	18.38%
Swan View	5123	5178	1.07%	5060	-2.28%

Table derived from Source: ABS Census 1996, 2001, 2006)

During the period 1996-2001 consistently high numbers of building approvals were seen and significant population changes were experienced by Mount Helena (9.71% gain), Helena Valley and Boya (34.38% gain) and Mundaring (10.08% gain) whilst Midvale and Bellevue showed a decline of -8.04%. Following this period of growth, as land and house stocks reduced, pricing and affordability played a role in the supply chain slowing movement into certain areas during the period 2001 - 2006. Mount Helena (2.67% gain), Helena Valley and Boya (-3.44%) and Mundaring (1.84% gain).

Throughout the period 1996-2006 the outer eastern area experienced significant and sustained growth. Larger lot sizes and the rural aspects of the townships and villages in this area maintain the attraction despite the lack of public transport provision. Sub-divisions have provided development opportunities whilst the Shire zoning policies have maintained lot sizes and prevented over development. The eastern region communities also appeal for their low crime levels, smaller schools and affordable properties.

4.7 Summary

Population distribution and changes throughout the townships can be partially attributed to socio-demographic factors including housing availability and affordability, employment, changes within the family composition and the changes to the population age profile.

The 'hills lifestyle' continues to retain existing, and attract prospective, residents despite the considerable and sustained rises in property and land valuations. Changes in family composition such as 'empty nesters' moving to rural blocks, the different aspirations and values of the 'baby boomers', generation X and generation Y, the ageing of the resident population, 'tree changers', educational and career opportunities and plans, are all factors affecting the decision to live within or to move away from Mundaring.

4.8 Population – Ethnic Origin and Language

Compared to the EMRC, within the Shire of Mundaring there are a smaller percentage of residents born overseas and a smaller proportion of residents from a non-English speaking background. 70.6% of the Shire of Mundaring residents were Australian born compared to 64.8% of EMRC residents, whilst 13.4% of our residents were born in the United Kingdom compared to 10.1% of EMRC residents.

4.5% of our residents (1546) stated that they spoke a language other than English at home, this compared to 13.1% within the EMRC. The dominant language spoken at home in the Shire of Mundaring, other than English, is Italian (1.2% of the population).

In 2006, 761 residents (2.2%) identified themselves as being of indigenous origins which is the same percentage as indigenous residents within the EMRC.

Country of Birth	Mundaring		EMRC
	Total Persons	% of Population	% of Population
Australia	24,110	70.6	64.8
United Kingdom	4,587	13.4	10.1
New Zealand	828	2.4	2.6
Italy	305	0.9	1.4
Germany	276	0.8	0.6
Netherlands	235	0.7	0.6
Other	3,0804	11.2	19.9
Total	34,145	100	100
Language Spoken at Home	Total Persons	% of Population	% of Population
Speak English Only	30,427	89.1	81.1
Non English Total	1,546	4.5	13.1
Not Stated	2,172	6.4	5.8

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006

NOTE: Table totals may not equate with other similar tables due to randomisation of small numbers.

4.9 Socio-Economic Disadvantage

“An indicator of socio-economic disadvantage has been developed to enable comparisons between areas. The index, called the **SEIFA** Index of Disadvantage (**S**ocio-**E**conomic **I**ndexes for **A**reas) is derived from attributes such as low income, low educational attainment, high unemployment, jobs in relatively unskilled occupations and variables that reflect disadvantage rather than measure specific aspects of disadvantage.

High scores on the SEIFA Index of Disadvantage occur when the area has few families on low income and few people with little training and in unskilled occupations. It is important to understand that a high score reflects lack of disadvantage rather than high advantage.”³ This Index provides valuable information for economic development planning, and socio-economic support and development.

These tables provide details of the SEIFA scores showing Mundaring in comparison to other Perth Local Government Areas and EMRC member councils, and Mundaring small area results.

Shire of Mundaring's small areas	2006 SEIFA Index
Midvale – Bellevue	917.1
Swan View	1008.2
Outer Eastern Region	1029.1
Greenmount	1040.3
Mount Helena	1047.4
Mundaring – Mahogany Creek	1048.6
Shire of Mundaring	1051.8
Helena Valley – Boya	1069.1
Parkerville – Stoneville – Hovea	1087.4
Glen Forrest	1093.3
Darlington	1112.4
Belmont (C)	964.7
Bassendean (T)	987.1
Swan (C)	1004.4
Bayswater (C)	1010.2
Kalamunda (S)	1047.9
Mundaring (S)	1051.8

Local Government Areas in the Perth Statistical Division	2006 SEIFA Index
Kwinana (T)	958.1
Belmont (C)	964.7
Armadale (C)	985.8
Bassendean (T)	987.1
Fremantle (C)	997.6
Victoria Park (T)	1002.4
Gosnells (C)	1003.5
Swan (C)	1004.4
Bayswater (C)	1010.2
Rockingham (C)	1014.2
Cockburn (C)	1019.0
Wanneroo (C)	1019.4
Stirling (C)	1020.5
Canning (C)	1037.6
Perth (C)	1045.9
Kalamunda (S)	1047.9
Serpentine-Jarrahdale (S)	1048.2
Vincent (T)	1049.7
Mundaring (S)	1051.8
Mosman Park (T)	1059.5
South Perth (C)	1065.5
Subiaco (C)	1074.6
Melville (C)	1080.0
East Fremantle (T)	1081.2
Joondalup (C)	1085.6
Claremont (T)	1090.4
Nedlands (C)	1118.5
Cambridge (T)	1119.0
Cottesloe (T)	1125.5
Peppermint Grove (S)	1139.3

4.10 Summary

The Shire of Mundaring returns a high score (see table) of 1051.8, a comparable level to the Towns of Vincent, Mosman Park and South Perth, and demonstrating the least disadvantage within the EMRC member councils. However within Mundaring there are localities that display lower levels of advantage including Midvale – Bellevue (SEIFA 917.1), Swan View (SEIFA 1008.2) and Greenmount (SEIFA 1040.3)

³ Australian Bureau of Statistics 2006, Socio-Economic Indexes for Areas (SEIFA 2006) cat. no. 2033.0.55.001

5 Employment

5.1 Shire of Mundaring Labour Force

Employment status (persons aged 15 years and over)								Shire of Mundaring			
Enumerated data	1996			2001			Change 1996 to 2001	2006			Change 2001 to 2006
	number	%	EMRC %	number	%	EMRC %		number	%	EMRC %	
Employed full time	9,150	59.7	61.1	9,309	56.8	59	159	9,810	58.2	61.9	501
Employed part time	4,883	31.9	28.5	5,634	34.4	30.9	751	6,028	35.7	31.6	394
Employed not stated	303	2	2.1	430	2.6	2.6	127	484	2.9	2.9	54
Total employed	14,336	93.6	91.8	15,373	93.7	92.4	1,037	16,322	96.8	96.4	949
Total unemployed	978	6.4	8.2	1,027	6.3	7.6	49	540	3.2	3.6	-487
Total labour force	15,314	100	100	16,400	100	100	1,086	16,862	100	100	462
Total in labour force	15,314	65.1	62.8	16,400	64.2	62.6	1,086	16,862	62.9	63.2	462
Total not in labour force	7,874	33.5	35.3	8,599	33.7	34.1	725	8,826	32.9	30.7	227
Not stated	333	1.4	1.9	547	2.1	3.3	214	1,134	4.2	6.1	587
Total	23,521			25,546			2,025	26,822			1,276

Source: ProfileId – ABS Census 2006

5.2 Employment, unemployment and participation

In 2006 the Shire of Mundaring had a labour force of 16,862 persons, of which 16,322 were employed (9,810 employed full time, 6,028 employed part-time), and 540 were unemployed.

Comparison of the employment status of the population in the Shire of Mundaring in 2006 to the EMRC shows that there were similar proportions employed and unemployed. Overall, 96.8% of the labour force was employed (60.9% of the population aged 15+), and 3.2% unemployed (2.0% of the population aged 15+), compared with 96.4% and 3.6% respectively for the EMRC. Between 1996 and 2006, the number of people employed in the Shire of Mundaring showed an increase of 1,986 persons and the number unemployed showed a decrease of 438 persons.

The labour force participation rate refers to the proportion of the population over 15 years of age that was employed or actively looking for work. *"The labour force is a fundamental input to domestic production. Its size and composition are therefore crucial factors in economic growth. From the viewpoint of social development, earnings from paid work are a major influence on levels of economic well-being."*⁴

Analysis of the labour force participation rate of the population in Mundaring (2006) shows that there was a similar proportion in the labour force (62.9%) compared with the EMRC (63.2%) and that between 1996 and 2006, in Mundaring, the number of people in the labour force showed an increase of 1,548 people, or 9.21%.

⁴ Australian Bureau of Statistics, *Australian Social Trends 1995*.

5.3 Occupations

Enumerated data	Occupation, 1997 ASCO (employed persons)			Shire of Mundaring			
	2001			2006			% Change 2001 to 2006
	number	%	EMRC %	number	%	EMRC %	
Managers and Administrators	1,136	7.4	6.2	1,240	7.6	6.5	9.2
Professionals	2,884	18.8	15	3,040	18.6	15.8	5.4
Associate Professionals	2,018	13.1	12.3	2,056	12.6	12.3	1.9
Tradespersons and Related Workers	2,136	13.9	14	2,299	14.1	14	7.6
Advanced Clerical and Service Workers	633	4.1	3.9	575	3.5	3.4	-9.2
Intermediate Clerical, Sales and Service Workers	2,592	16.9	18.3	2,843	17.4	18.2	9.7
Intermediate Production and Transport Workers	1,155	7.5	9.4	1,429	8.8	9.9	23.7
Elementary Clerical, Sales and Service Workers	1,534	10	10.6	1,480	9.1	9.9	-3.5
Labourers and Related Workers	1,045	6.8	8.4	1,137	7	8.4	8.8
Inadequately described	111	0.7	0.8	116	0.7	0.8	4.5
Not Stated	125	0.8	1	103	0.6	0.8	-17.6
Total	15,369			16,318			

Source: ABS, Census of Population and Housing, 2006, 2001, and 1996

An analysis of the occupations held by the resident population of the Shire of Mundaring in 2006 shows the three most popular occupations were:

- Professionals (3,040 persons or 18.6%)
- Intermediate Clerical, Sales and Service Workers (2,843 persons or 17.4%)
- Tradespersons and Related Workers (2,299 persons or 14.1%)

In combination these three occupations accounted for 8,182 people in total or 50.1% of the employed resident population. In comparison, the EMRC employed 15.8% as Professionals; 18.2% as Intermediate Clerical, Sales and Service Workers; and 14.0% as Tradespersons and Related Workers.

The major differences between the occupations of the population of Mundaring and the EMRC were

- A larger percentage of people were employed as Professionals (18.6% compared to 15.8%), and;
- A smaller percentage of people were employed as Labourers and Related Workers (7.0% compared to 8.4%).

The largest changes in the occupations held by the resident population in Mundaring between 2001 and 2006 were:

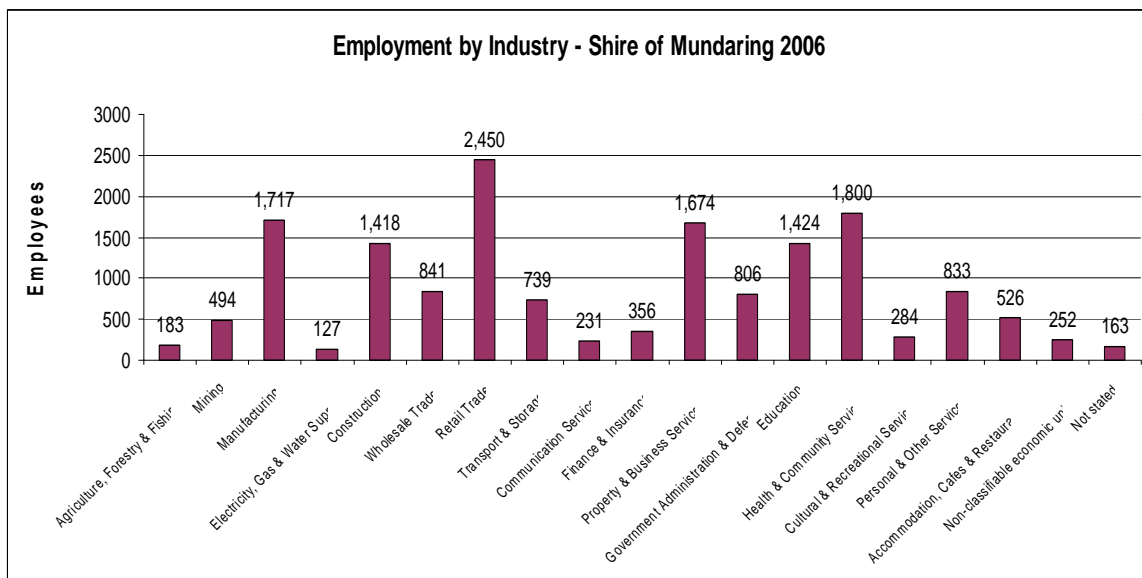
- Intermediate Production and Transport Workers (+274 persons);
- Intermediate Clerical, Sales and Service Workers (+251 persons);
- Tradespersons and Related Workers (+163 persons), and;
- Professionals (+156 persons).

6 Employment by Industry

Industry, 1993 ANZSIC (employed persons)	Shire of Mundaring						
	Enumerated data	2001			2006		
No.	%	EMRC %	No.	%	EMRC %		
Agriculture, Forestry & Fishing	243	1.6	1.4	183	1.1	1	-60
Mining	274	1.8	1.6	494	3	2.5	220
Manufacturing	1,618	10.5	12.1	1,717	10.5	11.6	99
Electricity, Gas & Water Supply	112	0.7	0.7	127	0.8	0.7	15
Construction	1,240	8.1	7.4	1,418	8.7	8.6	178
Wholesale Trade	844	5.5	6.3	841	5.2	5.6	-3
Retail Trade	2,391	15.6	15.9	2,450	15	14.9	59
Transport & Storage	723	4.7	5.1	739	4.5	5.3	16
Communication Services	270	1.8	2	231	1.4	1.6	-39
Finance & Insurance	373	2.4	3	356	2.2	2.8	-17
Property & Business Services	1,654	10.8	10.9	1,674	10.3	10.4	20
Government Administration & Defence	656	4.3	4.1	806	4.9	5	150
Education	1,362	8.9	6.5	1,424	8.7	6.7	62
Health & Community Services	1,577	10.3	9.5	1,800	11	10.2	223
Cultural & Recreational Services	385	2.5	2.5	284	1.7	2	-101
Personal & Other Services	781	5.1	4.4	833	5.1	4.2	52
Accommodation, Cafes & Restaurants	496	3.2	4.2	526	3.2	3.9	30
Non-classifiable economic units	145	0.9	0.9	252	1.5	1.5	107
Not stated	228	1.5	1.5	163	1	1.3	-65
Total	15,372	100	100	16,318	100	100	946

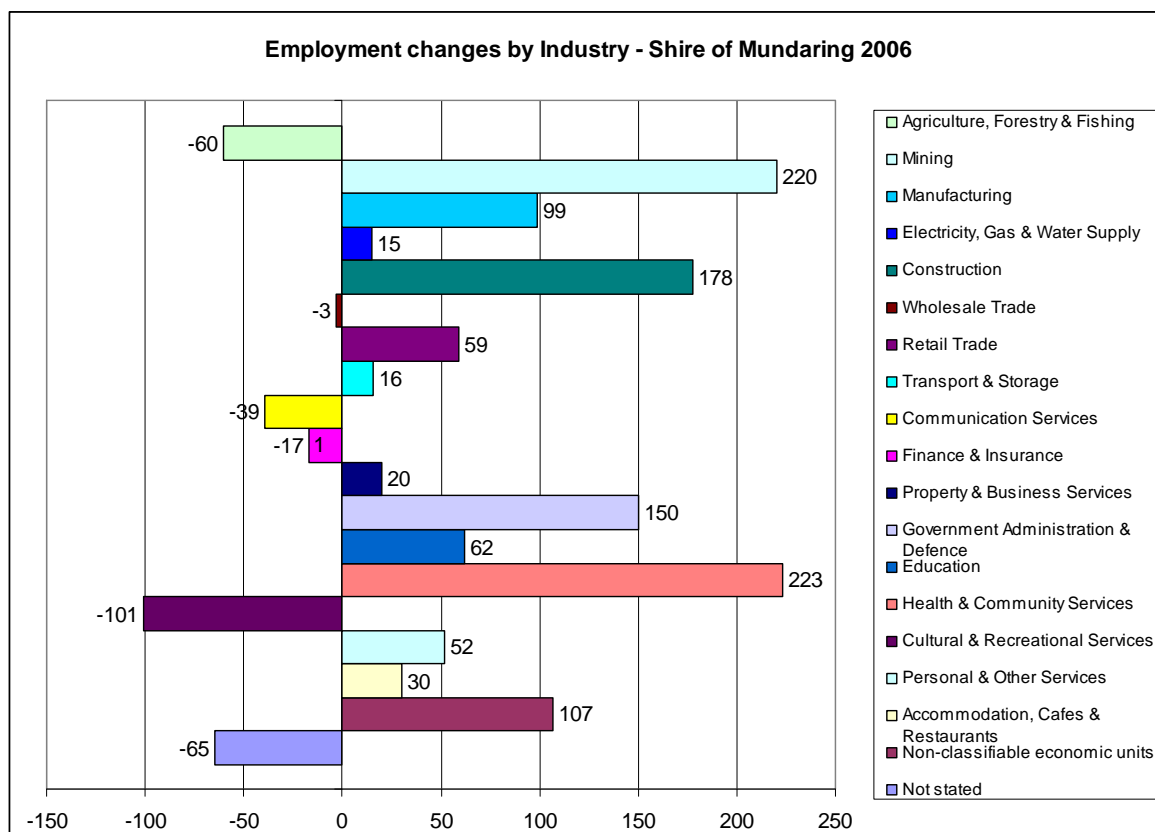
Source: Australian Bureau of Statistics, Census of Population and Housing, 2006

This table shows the industries within which our employed resident workforce work, these industries may be within, or outside of, the Shire of Mundaring.



Retail trade (2,450), Health Care and Social Assistance (1,800) and Manufacturing (1717) employ the largest numbers of employees. In combination these three industries employed 5,967 people in total or 36.6% of the employed resident population. In comparison, the EMRC employed a very similar 14.9% in Retail Trade; 10.2% in Health Care and Social Assistance; and 11.6% in Manufacturing.

6.1 Employment Changes



Numerically the largest changes in the jobs held by the resident population in the Shire of Mundaring between 2001 and 2006 were for those employed in:

- Health & Community Services (+223 persons);
- Mining (+220 persons);
- Construction (+178 persons), and;
- Government Administration & Defence (+150 persons).

However the largest percentage increase was in mining. Whilst there are companies based within Mundaring servicing the mining industry, there is no mining actually occurring here other than sand and gravel extraction and this increase represents a marked job shifting to outside of the Shire. Agriculture suffered a decline in jobs as did cultural and recreational services.

6.2 Summary of Employment

The trends over the period 1996-2006 have been for increases in the number of people in employment and reductions in those unemployed. Within Mundaring there is a low level of unemployment and an increasing labour force containing high proportions of professional, clerical and tradespersons. The predominant industries employing our resident workforce are retail trade, health care and social assistance, and manufacturing. The largest positive employment changes have occurred within the health and community services, mining, constructions and government sectors, whilst agriculture and cultural/recreational services suffered losses.

6.3 Where do our residents work?

Employment location of the Shire of Mundaring's residents, 2006		
Within the Shire of Mundaring	4,255	25.2%
Outside the Shire of Mundaring	10,950	65.0%
Work Location Unknown	1,651	9.8%

Source: Australian Bureau of Statistics, *Journey to work*, unpublished data, 2006

Of the 16,856 employed residents, 4,255 (25.2%) work within the Shire of Mundaring and 12,601 (74.8%) work outside of it.

Of those working outside the Shire of Mundaring 5,213 (30.9%) work within adjoining EMRC member council areas with Swan being the most popular followed by Perth.

Top 10 Local Government Areas of employment for residents in the Shire of Mundaring, 2006			
Rank	Local Government Area	Number	(%)
1	Mundaring (S)	4,255	25.2
2	Swan (C)	3,207	19.0
3	Perth (C)	1,666	9.9
4	Belmont (C)	861	5.1
5	Canning (C)	778	4.6
6	Stirling (C)	512	3.0
7	Kalamunda (S)	489	2.9
8	Bayswater (C)	430	2.6
9	Victoria Park (T)	352	2.1
10	Bassendean (T)	226	1.3
	Other Areas	4,080	24.2
Total employed residents in the Shire of Mundaring		16,856	

6.4 Where do our workers come from?

Residential location of workers in the Shire of Mundaring, 2006		
Live and work within the Shire of Mundaring	4,255	59.6%
Live outside of , but work within the Shire of Mundaring	2,886	40.4%
Total workers in the Shire of Mundaring	7,141	

Source: Australian Bureau of Statistics, *Journey to work*, unpublished data, 2006.

Workers employed within Mundaring come from a variety of locations, the majority of workers, 4,255 (59.6%) being residents of Mundaring whilst workers from adjacent councils - Swan, Kalamunda and Northam make up a further 1,666 (23.3%) of the workforce.

Top 10 Local Government Areas of residence ^(a) for workers in the Shire of Mundaring, 2006			
Rank	Local Government Area	Number	(%)
1	Mundaring (S)	4,255	59.6
2	Swan (C)	1,058	14.8
3	Kalamunda (S)	402	5.6
4	Northam (S)	206	2.9
5	Stirling (C)	142	2.0
6	Bayswater (C)	114	1.6
7	Gosnells (C)	101	1.4
8	Joondalup (C)	87	1.2
9	Wanneroo (C)	85	1.2
10	Canning (C)	70	1.0
	Other areas	621	8.7
Total workers in the Shire of Mundaring		7,141	

6.5 Travel to Work

Travel to work (includes multi-mode journeys)							Shire of Mundaring
Enumerated data	2001			2006			Change 2001 to 2006
	number	%	EMRC %	number	%	EMRC %	
Train	665	4.3	3.5	723	4.4	3.9	58
Bus	170	1.1	3.1	211	1.3	3.5	41
Tram or Ferry	0	0	0	3	0	0	3
Taxi	6	0	0.1	8	0	0.2	2
Car - as driver	9,816	63.9	64.4	10,583	64.8	64.4	767
Car - as passenger	689	4.5	5.7	819	5	5.9	130
Truck	285	1.9	1.7	254	1.6	1.4	-31
Motorbike	77	0.5	0.6	123	0.8	0.6	46
Bicycle	53	0.3	0.8	54	0.3	0.8	1
Walked only	225	1.5	1.5	195	1.2	1.6	-30
Other	240	1.6	1.3	187	1.1	1.1	-53
Worked at home	879	5.7	4.2	825	5.1	3.6	-54
Did not go to work	2,026	13.2	11.7	2,042	12.5	11.2	16
Not stated	237	1.5	1.5	293	1.8	1.8	56
Total	15,368			16,320			952

Source: ABS, Census of Population and Housing, 2006, 2001, 1996, and 1991.

From the census data it can be seen that in 2006, there were 937 people who used public transport for the journey to work (train, bus, tram or ferry) in the Shire of Mundaring, compared with 11,525 who travelled in private vehicles (car as driver, car as passenger or motorbike). As there are no trains, tram or ferries within the Shire of Mundaring the number of people that are commuting solely by public transport is a maximum of 211, those who use a bus.

The limited bus services integrate with the train service at Midland station and it can be assumed that a proportion of the 723 who travel by train use private vehicles to travel to Midland station and then continue their journey by train. The potential to increase the use of bus services may exist within this cohort but this would require a more acceptable level of bus services which could, in turn, enable more existing private vehicle users to convert to public transport.

6.6 Summary of Travel to Work

Analysis of the method of travel to work of the residents in the Shire of Mundaring in 2006 compared to the EMRC shows that 5.7% used public transport, while 72.2% used a private vehicle, compared with 7.4% and 72.3% respectively in the EMRC. It should be noted that the EMRC includes Bassendean, Swan, Belmont and Bayswater, all of which have much more extensive and accessible existing public transport systems than the Shire of Mundaring. In view of the similarity in the percentage of Mundaring residents using private vehicles despite much lower levels of public transport provision it could be surmised that they are more inclined to use public transport than other EMRC residents, and that may indicate a potential market for improved public transport throughout Mundaring.

The largest changes in the method of travel to work by the resident population in the Shire of Mundaring between 2001 and 2006 were for those nominated:

- Car - as driver (+767 persons)
- Car - as passenger (+130 persons)
- Train (+58 persons)
- Worked at home (-54 persons)

6.7 Qualifications & Education

As society and technology progresses, the requirement for a knowledge based population able to meet the needs and demands of employers increases. The level of qualifications required of employees and the perceived value of further and higher education in career progression has contributed to the steady increases in educational participation. Economic development of Mundaring is dependant on employers and the workforce; the better the match between employer's requirements and employee's qualifications the more opportunities there are for local employment and career building, ensuring stability within the workforce and economic growth.

The following information relates to two groups within Mundaring, the resident population - those people who live within the Shire, and the working population – those people who work within the Shire of Mundaring but do not necessarily live within the Shire.

Resident Population			Shire of Mundaring		
Highest qualification achieved (aged 15 years and over)			Highest qualification achieved (aged 15 years and over)		
Enumerated data	2001		2006		Change 2001 to 2006
	number	%	number	%	
Bachelor or Higher degree	3,099	12.1	3,685	13.7	586
Advanced Diploma or Diploma	1,983	7.8	2,290	8.5	307
Vocational	5,019	19.6	5,229	19.5	210
No qualifications	12,788	50.1	11,895	44.4	-893
Not Stated	2,658	10.4	3,716	13.9	1,058
Total	25,547		26,815		

Source: ABS, Census of Population and Housing, 2006, 2001

Working Population			Shire of Mundaring		
Highest qualification achieved (aged 15 years and over)			Highest qualification achieved (aged 15 years and over)		
Enumerated data	2001		2006		Change 2001 to 2006
	number	%	number	%	
Bachelor or Higher degree	1,049	16.1	1,190	16.7	141
Advanced Diploma or Diploma	560	8.6	678	9.5	118
Vocational	1,566	24.0	1,528	21.4	-38
No qualifications	2,971	45.5	3,330	46.6	359
Not Stated	388	5.9	416	5.8	28
Total	6,534		7,142		

Source: ABS, Census of Population and Housing, 2006, 2001

6.8 Summary of Qualifications & Education

The working population has a slightly higher percentage of higher education qualifications (Diploma, Bachelor, Higher Degree) than the resident population; however the number of residents who did not state their education levels was much higher at 13.9% compared to the workforce figure of 5.8% (2006).

In 2001, 50.1% of the residents who were of working age (15yrs+) had no qualifications; this was slightly higher than the percentage of the working population that had no qualifications (45.5%). By 2006 this situation had changed with 44.4% of the resident population having no qualifications, whilst 46.6% of the working population had no qualifications. This indicates that the resident population are improving their qualifications, or participating more in the higher education system.

The percentage of resident's holding vocational qualifications was slightly lower than that of the working population. If this is considered in relation to changes in employment industries it may indicate a move away from low-skilled occupations towards higher-skilled occupations. In view of the changes in educational attainment there would appear to be an increase in the requirement for, and uptake of education and training by the resident workforce.

7 Resident's Income

7.1 Individual's weekly income (enumerated data)

Weekly Individual Income Income \$	Shire of Mundaring 2006		EMRC %
	Individuals	Mundaring %	
Negative / nil income	1,883	7.0	6.5
\$1 to \$249	5,238	19.5	20.2
\$250 to \$399	3,328	12.4	12.6
\$400 to \$599	3,375	12.6	13.9
\$600 to \$799	2,739	10.2	11.6
\$800 to \$999	2,240	8.4	8.8
\$1,000 to \$1,599	3,581	13.4	12.7
\$1,600 to \$1,999	753	2.8	2.3
\$2,000 or more	872	3.3	2.5
not stated	2,811	10.5	8.8
Total Individuals	26,820		

7.2 Household weekly income (enumerated data)

Weekly Household Income Income \$	Shire of Mundaring 2006		EMRC %
	Households	Mundaring %	
Negative / Nil Income	88	0.7	0.9
\$1 to \$249	518	4.4	5.7
\$250 to \$499	1152	9.6	10.8
\$500 to \$649	1,777	15.0	16.5
\$800 to \$999	787	6.6	7.3
\$1000 to \$1199	1,233	10.3	11.3
\$1200 to \$1399	703	5.9	6.0
\$1400 to \$1699	1,063	8.9	8.4
\$1700 to \$1999	894	7.5	6.5
\$2000 to \$2499	825	6.9	6.4
\$2500 to \$2999	701	5.9	4.6
\$3000 or more	568	4.8	3.6
Partial income stated	1,314	11.0	9.2
All incomes not stated	299	2.5	2.8
Total	11,922	100.0	100.0

Source: ABS, Census of Population and Housing, 2006

7.3 Summary of Resident's Income

In 2006, 19.5% of Mundaring's population earned a high income (more than \$1,000 per week), and 38.9% earned a low income (less than \$400 per week), compared with 17.5% and 39.3% respectively for the EMRC. Whilst Mundaring had a higher proportion of high income earners than the EMRC, the greater proportion of the population in both Mundaring and the EMRC were on low income levels.

In 2006, 25.1% of households in Mundaring had high income levels (\$1,700 per week or more), and 14.7% were low income households (less than \$500 per week). This compared to the EMRC households where 21.1% had high incomes and 17.4% low incomes.

These changes in income levels reflect changes within the workforce; increased employment, changes to the composition of the workforce with increases in professionals and tradespeople, moves to higher paid employment and the benefits of the WA mining and resources boom.

8 Internet and Computer Use

The use of the internet and computers is now accepted by many as an essential part of everyday living; online business, shopping, banking, education and many other facets of modern life rely on access to high speed data networks. Unfortunately, for many residents, the capabilities of modern internet provision reduce as the distance between the telephone exchange and the computer increases, when that distance exceeds 5 km internet access speeds are known to drop significantly. In addition there are still many instances of 'pair gain' telephone service, a situation where two or more subscribers share one telephone line and which, in its basic form, is unsuitable for accessing broadband services.

8.1 Broadband Black spot Survey

Broadband internet access is available throughout the majority of Mundaring but there are a number of broadband black spots. A recent survey carried out by the EMRC highlighted the problems experienced by many Mundaring residents, particularly those living at some distance from their local telephone exchange. Following analysis of that survey it is apparent that measures need to be taken to eliminate broadband black spots and meet the requirements of the 21st century for reliable and fast internet access available to all.

8.1.1 Survey Findings – Overview

- 130 survey responses were received from the 1st February to the 31st March 2008.
- Survey responses were received from all member Councils except the Town of Bassendean.
- Responses were predominantly from households.
- Respondents expressed a strong desire for access to ADSL broadband.
- 14 Broadband Black spot Clusters were identified.
- 75% of surveys had additional comments of which 70 comments could be used to identify existing service, desired service and issues.

Main issues identified from these comments include:

- Unsatisfied with existing Service (Speed, Cost or Reliability),
- Pair gain
- Distance from the exchange

Council Area	Household	Small Business	Household & Small Business	Other	Total
Swan	41	14	3	2	60
Belmont	27	2	1	0	30
Mundaring	23	4	0	1	28
Bayswater	4	4	1	0	9
Kalamunda	2	1	0	0	3
Total	97	25	5	3	130

8.1.2 Issues Raised By Respondents

Respondents were asked to provide any general comments on their Broadband needs. 74.6% of respondents provided additional or explanatory information of which 70 comments could be used to identify issues, existing or desired broadband service.

Issue Identified	Issue Identified	% of Comments
Pair Gain	10	11.2%
Distance from Exchange	10	11.2%
Port Availability	4	4.5%
General Wiring Issue	3	3.4%
Unhappy with existing service - Unstated	5	5.6%
Unhappy with existing service - Cost	13	14.6%
Unhappy with existing service – Reliability	8	9.0%
Unhappy with existing service – Speed	16	18.0%
Desired Service Unavailable	10	11.2%
Dial up only option	3	3.4%
Telstra	2	2.2%
Other	5	5.6%
Total Comments	89	100%

8.1.3 Summary of main issues identified:

1. Unhappy with existing Service – Speed 18.0%
2. Unhappy with existing Service – Cost 14.6%
3. Desired Service unavailable 11.2%
4. Pair gain 11.2%
5. Distance fro the Exchange 11.2%
6. Unhappy with existing Service – Reliability 9.0%

8.1.4 Broadband Black spot Clusters

For the purpose of this report, a Broadband Black spot Cluster refers to a group (3 or more) of survey respondents who are experiencing issues accessing suitable Broadband.

Clusters are not limited to individual Council areas and can span several suburbs. The following clusters were identified:

Cluster Title	Member Council Area	Suburbs	Number of Responses
Morley	Swan, Bayswater	Morley, Beechboro, Malaga, Kiara, Lockridge, West Swan	14
Ascot	Belmont, Bayswater	Ascot, Bayswater, Redcliffe	5
Kewdale	Belmont	Kewdale, Cloverdale, Rivervale	26
Sawyers Valley	Mundaring	Sawyers Valley, Mt Helena	4
Stoneville	Mundaring	Stoneville	10
Parkerville	Mundaring	Parkerville, Hovea	3
Bellevue	Mundaring, Swan	Bellevue	6
Chidlow	Mundaring, Swan	Chidlow, Gidgegannup	7
Gidgegannup	Swan	Gidgegannup	4
Belhus	Swan	Belhus, Brigadoon, Ellenbrook, Millendon	5
West Swan	Swan	West Swan	8
Middle Swan	Swan	Middle Swan, Stratton, Herne Hill	7
Bullsbrook	Swan	Bullsbrook	13
Guildford	Swan	Guildford, Sth Guildford, Hazlemere	6
		Total:	118

8.2 Summary

Within Mundaring there are many home based businesses and prospective rural based businesses that would benefit from, or simply can not operate without, high speed internet access. The provision of that access is seen by other EMRC member business support organisations, and by the Federal Government, as an important step towards economic development.

The Federal Government Broadband Guarantee initiative which aims to provide affordable broadband services to all households and small businesses was publicised as part of the EMRC broadband black spot survey.

Any Australian who is unable to access a metro-comparable broadband service at their principal place of residence or small business will be eligible to receive a subsidised service under the Australian Broadband Guarantee. A metro-comparable broadband service is a minimum 512/128kbps data speed, 1GB per month data usage and a total cost, over three years, including installation and connection fees, of \$2,500 GST inclusive.

As there are areas within the Shire still suffering broadband access problems, a strategy is required to remedy those black spots and to enhance the general speed and accessibility to the internet for business and residents use, including promoting and lobbying for progress with the Broadband Guarantee.

9 Housing Tenure – Owners, Buyers, Renters?

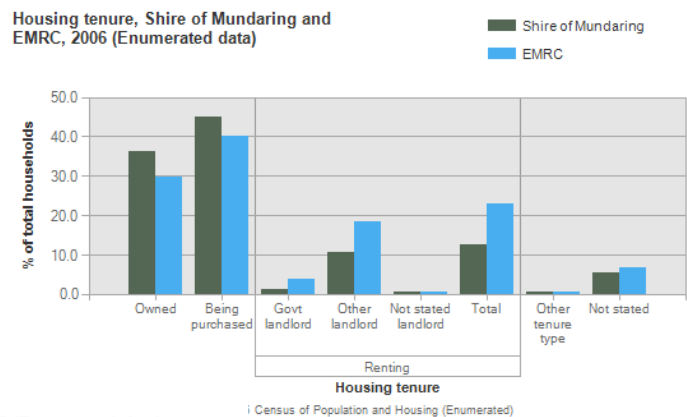
Housing Tenure (households)	Shire of Mundaring						
	2001			2006			Change
Enumerated data	Number	%	EMRC %	Number	%	EMRC %	2001 to 2006
Owned	5,020	42.3	35.9	4,486	36.4	29.7	-534
Being purchased	4,898	41.3	36.6	5,555	45.1	40.1	657
Renting – Govt	157	1.3	4.4	152	1.2	3.9	-5
Renting – Other	1,203	10.1	17.0	1,302	10.6	18.4	99
Renting – Not stated	13	0.1	0.2	89	0.7	0.6	76
Renting Total	1,373	11.6	21.6	1,543	12.5	22.9	170
Other tenure type	229	1.9	2.1	71	0.6	0.6	-158
Not Stated	349	2.9	3.7	666	5.4	6.8	317
Total	11,869			12,321			

Source: ABS Census 2006, ProfileId

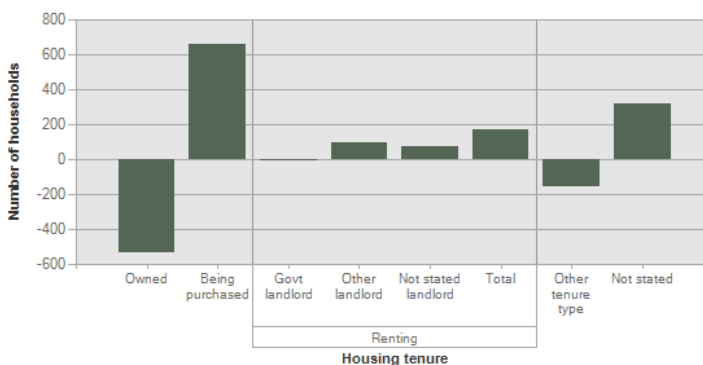
Analysis of the housing tenure of the population of the Shire of Mundaring in 2006 compared to the EMRC shows that there was a larger proportion of households who owned their dwelling; a larger proportion purchasing their dwelling; and a smaller proportion who were renters. Overall, 36.4% of the population owned their dwelling; 45.1% were purchasing, and 12.5% were renting, compared with 29.7%, 40.1% and 22.9% respectively for the EMRC.

The largest changes in housing tenure categories for the households in the Shire of Mundaring between 2001 and 2006 were:

- Being purchased (+657 households);
- Renting - Total (+170 households);
- Owned (-534 households), and;
- Other tenure type (-158 households).



Change in housing tenure, Shire of Mundaring, 2001 to 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 and 2001 Census of Population and Housing (Enumerated)

9.1 Summary – Property Tenure & Demand

Housing tenure analysis has demonstrated that 81.5% of residents are home owners or purchasing their properties with 12.5% renting. Rental property throughout the Shire of Mundaring is at a premium and in heavy demand.

10 Building and Land Development

10.1 Zoning

In order to manage the development of the land within the Shire of Mundaring a zoning system is used allocating specific categories to each lot.

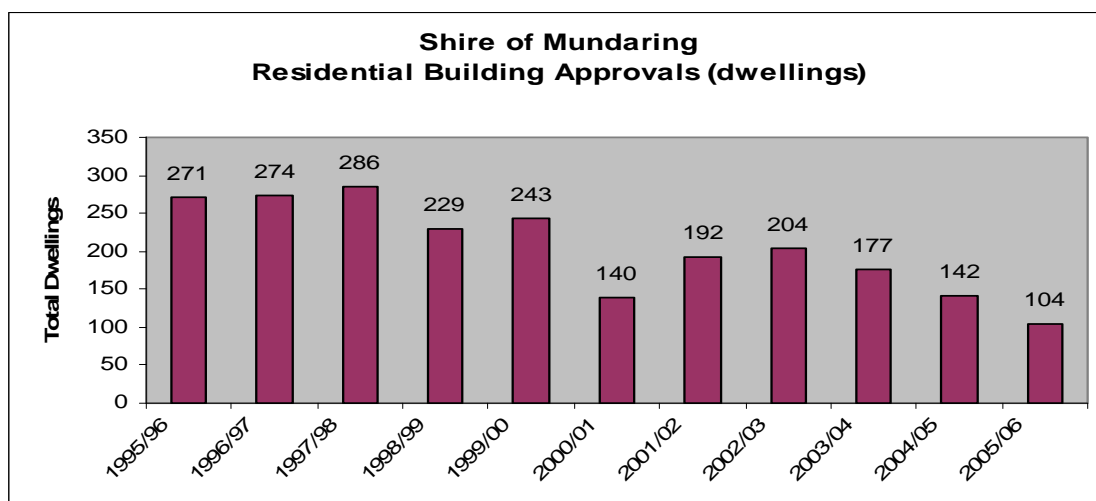
Some of the zones are further divided, for example Zone Rural Landscape Living comprises RLL1 (1 hectare minimum lot size per dwelling), RLL2 (2 hectare per dwelling), RLL4 (4 hectare per dwelling) and RLL (no subdivision supported).

This system provides a framework for the management of usage and development, ensuring a consistent approach by the Shire.

ZONES
• District Shopping
• District Business
• Local Centre
• Service Commercial
• Light Industry
• Residential
• Rural Landscape Living
• General Rural
• Special Purpose

10.2 Building Approvals

Residential building approval statistics are a leading indicator of the general level of economic activity, employment and investment.



The trend since 1995 has been for a steady decline in the total number of building approvals. The introduction of GST in 2000/01 GST was followed by a significant state wide drop in approvals. In 2001/02 the building approvals increased for a while until throughout the period 2003/2006 there has been a steady decline in building approvals. During this period a range of factors have contributed to the decline:

- The West Australian resources boom
- Lack of available residential building land
- Increasing demand for a hills lifestyle
- Significant interest rate rises

10.3 Residential Property Sales

The following table of property sale statistics for the Shire of Mundaring was supplied by "The Valuer General, Landgate, Perth, Western Australia".



PROPERTY SALES STATISTICS FOR MUNDARING

SALE PRICE STATISTICS FOR THE SHIRE OF MUNDARING																		
PROPERTY USE	2002			2003			2004			2005			2006			2007		
	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count
Residential	169,000	189,287	1,050	200,000	218,883	1,036	246,000	263,801	850	305,000	328,408	952	405,000	436,052	874	480,000	542,070	625
Industrial	187,000	294,185	21	200,000	267,179	26	247,500	268,907	27	260,000	267,633	27	395,750	568,664	14	725,000	739,846	13
Commercial	777,000	777,000	2	297,000	331,457	7	226,125	328,204	12	335,000	363,955	11	369,000	380,571	7	430,690	1,009,138	5

RESIDENTIAL SALE PRICE STATISTICS																		
SUBURB	2002			2003			2004			2005			2006			2007		
	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count	Median(\$)	Mean(\$)	Count
Beechina	130,000	138,625	4	220,000	223,000	4				312,500	312,500	2	415,000	415,000	2	505,000	505,000	2
Bellevue	127,500	116,867	18	150,000	145,630	23	172,500	173,500	12	192,500	183,850	14	307,000	306,381	21	343,000	348,821	14
Boya	172,500	204,636	22	226,000	230,406	16	258,000	240,816	19	308,500	302,813	16	420,000	427,207	29	545,000	564,231	13
Chidlow	124,500	146,275	51	157,500	182,616	56	215,000	253,671	39	312,000	313,230	40	372,500	415,556	36	421,250	469,382	34
Darlington	235,000	260,778	99	286,000	300,721	104	305,000	337,258	91	385,000	417,377	107	520,000	550,176	85	615,000	721,674	66
Glen Forrest	202,250	213,948	82	242,000	263,439	75	270,000	289,136	66	339,000	343,571	63	438,000	455,028	72	517,500	575,961	38
Greenmount	159,000	176,648	81	179,490	201,815	73	238,000	244,092	60	286,500	299,691	72	387,500	413,025	60	449,000	486,478	45
Helena Valley	223,500	234,333	84	255,000	262,519	81	315,000	320,260	67	348,500	366,161	62	460,000	444,993	63	560,000	610,286	49
Hovea	234,000	272,889	18	325,000	309,455	11	420,000	442,654	13	480,000	538,409	11	655,000	685,313	16	870,000	925,386	7
Jane Brook	320,000	320,000	1															
Mahogany Creek	195,000	198,650	20	225,000	233,346	26	285,500	276,778	18	343,500	342,125	32	405,000	404,850	20	610,000	583,292	12
Midvale	90,000	98,474	38	126,000	126,317	35	159,000	157,846	26	191,500	191,607	42	285,000	278,957	35	318,750	324,327	26
Mount Helena	160,000	164,101	87	166,500	174,401	96	241,000	248,461	79	287,000	299,608	87	379,000	395,627	75	475,000	519,081	71
Mundaring	200,000	202,787	94	230,000	230,026	95	249,000	271,449	82	360,000	362,069	80	450,000	492,821	81	534,500	561,390	50
Parkerville	195,000	202,303	57	222,000	237,993	72	218,000	240,998	53	355,000	381,289	57	441,000	455,563	48	575,000	619,562	37
Sawyers Valley	190,000	189,267	29	187,500	182,339	28	250,000	258,467	15	300,000	316,036	14	407,500	425,300	20	570,000	625,176	17
Stoneville	160,000	169,630	83	210,000	223,210	79	247,000	267,121	59	317,500	337,324	68	450,000	460,600	60	521,600	546,501	39
Swan View	142,000	164,970	171	160,500	183,017	142	182,750	222,356	134	241,000	285,454	162	360,000	382,172	138	390,000	452,269	94
The Lakes	56,000	56,000	1															
Woorlooloo	108,500	112,750	10	156,000	161,425	20	165,000	168,824	17	265,000	269,478	23	350,000	383,769	13	363,000	371,000	11

This information is based on actual sales records and is intended only as guide to market performance and trends. Where sample sizes are small, the analysed results become less accurate and less reliable. Caution should be exercised when using results under these circumstances.

Sales data have been adjusted where possible to exclude multi-lot transfers, and property transfers that may not represent a genuine, open market sale (non arms-length) such as those between related parties, transfers involving institutional bodies, or where no buyer or seller is identified.

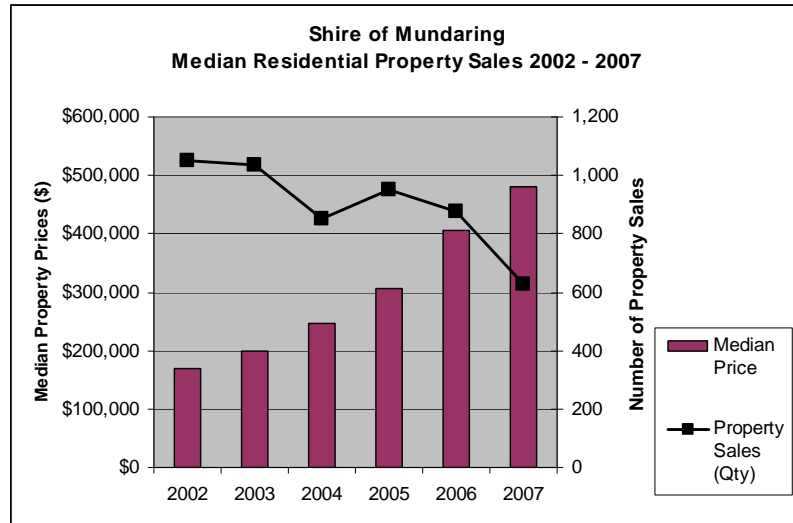
This analysis utilises sales made in the period shown, that is, at the date the contract of sale was completed as opposed to the date of settlement or lodgement of documents with the Office of Titles. As a consequence, settlement processes, including registration, on many sales occurring in the last 2 months or more may not yet be complete and any analyses that cover this period may not present an accurate indication of trends.

Source Data Updated 30.06.08

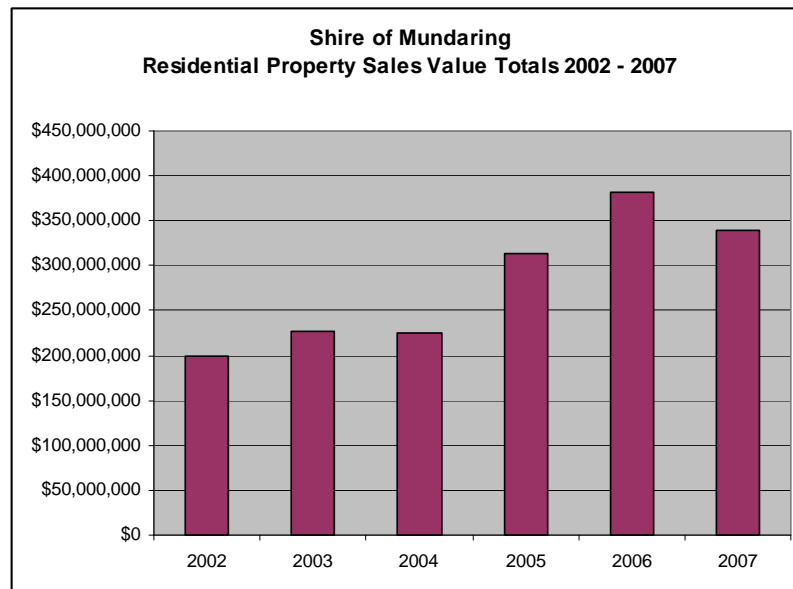
Source: The Valuer General, Landgate, Perth, Western Australia

10.3.1 Residential Property Sales Analysis

Notes: In the following section which refers to the table of property sales statistics for the Shire of Mundaring, (source: **The Valuer General, Landgate, Perth, Western Australia**), the term Median refers to the middle value in a list of values, whilst Mean refers to the average value of a list of values. Count is the number of property sales. The total value for property sales within the residential, industrial and commercial sectors can be estimated by multiplying the mean value by the count value.



For the period 2002 – 2007 it can be seen that whilst the number of individual residential property sales showed a steady decrease, the median price for those property sales increased from \$169,000 to \$480,000; growth of 180%. For the same period the annual total value for residential property sales within the Shire has shown growth of 70%.



In 2007 the highest median residential house prices were approximately \$870,000 in Hovea and \$615,000 in Darlington, with the lowest being \$318,750 in Midvale and \$343,000 in Bellevue. The most significant increases between 2002 and 2007 in median house prices have been in the townships of Beechina (+288%), Hovea (+271%) and Midvale (+254%).

During the period 2002 – 2007 the highest number of houses sold each year has been in Swan View followed by Darlington, and then by either Mundaring or Mount Helena. In 2007 Mount Helena exceeded Darlington in house sales for the first time.

Swan View has a significantly higher housing density than any other area within the Shire of Mundaring, and is closer to Midland and the railway station which affords easy access to the City of Perth. Median house prices have been consistently and significantly below those of Darlington, Mundaring and Mount Helena. With different property types, larger block sizes as the norm and the attraction of the Hills Lifestyle the latter three areas are likely to retain that price differential. However there are sought after areas of development within Swan View that offer larger high value properties, particularly those properties located on the Darling Scarp with City views.

It can be seen that the Shire of Mundaring provides the opportunity for housing to meet many different requirements, from small urban units to rural hobby farms. Further details of individual township property sales and median price patterns can be derived from the Landgate table of property sales.

10.4 Commercial and Industrial Property Sales

Commercial and Industrial land and property sales are handled by a number of agents throughout the Perth Metropolitan area and interstate, For the preparation of this document the source of data relating to those sales is the Valuer General, Landgate, Perth, Western Australia.

Within the Shire of Mundaring there are two main Industrial areas; to the east of Mundaring adjacent to the Great Eastern Highway is the Mundaring Industrial Area, and in Midvale there is the Midvale Business Centre which is a mix of Industrial, Commercial and Retail activities.

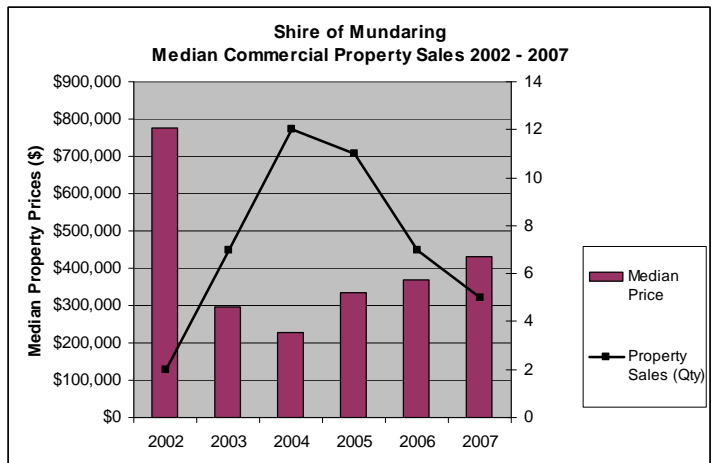
Commercial properties are also located within Mundaring along the Great Eastern Highway, in Nichol Street and in individual properties located throughout the Shire. Anecdotal opinion of business owners and agents is that there is a severe shortage of suitable properties, many businesses being run as home based or small businesses due to lack of available premises. This lack of suitable commercial properties is seen as an inhibitor to expansion by businesses that wish to locate or expand within the Shire.

Retail businesses within Mundaring are concentrated in the main retail centre adjacent to the Great Eastern Highway within the township of Mundaring. In addition every township has retail outlets to varying degrees.

10.4.1 Commercial Property Sales

Commercial property sales volume peaked in 2004 with 12 sales. The peak median value in 2002 is based on only 2 sales in that year and was followed by a drop in value for 2003. For the remainder of the period 2003 – 2007 the median price showed a steady increase.

From the Landgate data table it can be seen that the annual total sales value of commercial property (mean value x count of



property sales) has shown a growth of 225% from 2002 to 2007.

In 2007 the total commercial property sales value of \$5,045,690 was achieved from 5 sales. With the median price of \$430,690 and the mean price of \$1,009,138 it can be deduced that the value of two of the sales was a minimum of \$1.8 million each, illustrating the substantial growth in value of commercial property within Mundaring.

10.4.2 Industrial Property Sales

Industrial property sales maintained volume until 2006 when there was a steep decline; however the median price rose sharply between 2005 and 2007. The significant shortages in available industrial land may have contributed to both the volume decline and the median price increase.



10.5 Summary

The recent global and Australian economic changes have had immediate effects on the property and development markets. Whilst interest rates have dropped during the latter part of 2008 and first time home buyers' grants have been raised, the increased volatility and uncertainty within employment has had an impact and contributed to a slow down in property sales. These extreme factors and their consequences should be taken into consideration when calculating future trends or forecasts.

The longer term historical view shows that whilst the volume of residential property demand has reduced in many areas of Mundaring, there has been an increase in median and mean house pricing. Mortgage interest rate increases, shortage of tradespeople, the boom in the resources industry, lifestyle changes, all contributed to the residential property supply and demand balance.

The sub-division of larger blocks and residential building development continues but infrastructure capacity limits, particularly existing sewerage systems or lack thereof, inhibit development opportunities, as does the scarcity of building land.

The existing Town Planning Scheme is currently under review and the new scheme provides the opportunity to manage sustainable growth of residential, commercial and industrial properties. Investment in infrastructure development will be needed to meet the future demands that such growth will put on the existing systems.

Demand for both industrial and commercial property continues and strategies are required to address the shortages which are inhibitors to economic growth within the Shire of Mundaring. However such expansion needs to be managed and implemented balancing economic, environmental and community issues to achieve sustainable growth.

11 Business

11.1 Business within the Shire of Mundaring

Industrial and trade centres are located at the Midvale Business Centre in Midvale and at Mundaring Trade Centre on the eastern edge of Mundaring. At both centres there is a good mix of industries operating including retail, production, warehousing and distribution, and other service enterprises. In addition there are numerous small and home based businesses operating within the Shire providing a significant variety of trades, services and goods. Most businesses operating within the Shire would come within the category of small to medium enterprises.

Located to the east of the main township of Mundaring and with direct access to the Great Eastern Highway, the Mundaring Trade Centre has an extensive range of businesses including building and gardening/landscaping materials suppliers, a variety of vehicle based trades; smash repair, vehicle servicing, auto-electrical and commercial vehicle body building, farm and rural goods suppliers, equipment hire, LPG and heating specialists, and animal services that include a veterinary surgery and animal boarding. The Shire of Mundaring operations centre and animal pound are also located in the Mundaring Trade Centre.

Midvale Business Centre is an extensive estate in Midvale which is bordered by the City of Swan, enjoying close proximity to the town of Midland and main roads including the Great Eastern and Roe Highways. The International and Domestic Airports, and the railway station in Midland, are within 15 minutes drive, and with higher residential density in Midvale, Midland and surrounding areas there is easy access for the workforce and customers.

Both sites enjoy high levels of occupancy but have limited capacity for expansion; however the issues of identifying suitable land for future industrial use are being addressed as part of the Town Planning Scheme 4 review. Without expansion capabilities, attracting new investment to Mundaring, and retaining existing businesses as they expand and require bigger premises, may be problematic. In addition whilst the Midvale Business Centre has deep sewerage facilities Mundaring Trade Centre does not. Investigation by other EMRC councils has highlighted the lack of deep sewerage facilities as significantly inhibiting development potential.

There is a lack of accurate information detailing the extent of business activity within the Shire, particularly small and home based businesses. That information is required for informed planning and business support to take place effectively and will shortly be available to the Shire, under strict data access and confidentiality conditions. Current information publicly available shows the following statistics for business registrations within the Shire of Mundaring.

Broad ABN registration information is available by postcode, however the postcode of 6056, in which the Shire suburbs of Boya, Greenmount, Helena Valley, Midvale and Swan View are located also includes Midland, Bellevue and other areas containing high densities of business operation (refer to appendix i for further information).

The inclusion of 15% of ABN registrations within the postcode 6056 was used to give a reasonable estimation of those businesses within that postcode and located in the Shire of Mundaring.

	Oct 2007	Oct 2008
All ABN registrations	9,740	10,526
Active ABN registrations	7,792	8,176
Active GST registered ABN registrations	3,262	3,292

Distribution of ABN registrations by postcode within the Shire of Mundaring			
Postcode	All ABN	Active ABN	Active GST registered ABN
6056 (15%)	1897	1456	623
6070	1613	1288	436
6071	1429	1106	436
6072	286	201	68
6073	1308	994	468
6074	379	300	128
6081	1560	1232	514
6082	1025	806	289
6556	740	568	241
6558	289	225	89
Totals	10526	8176	3292

Source: Australian Business Register 2008

Refer to appendix for detailed postcode/location coverage

11.2 Retail

The main retail centre is at the Mundaring town site shopping centre where there is a vibrant mix of retail outlets including a Post Office, chemist and pharmacy, three supermarkets, greengrocer, butcher, bakers, news and stationers, computer sales, music, clothes and fashion, restaurants, cafes and fast food outlets, florist, shoe shop, and chainsaws and mowers.

Services in or adjacent to the retail centre include a significant health centre, optical services, dentists and dental services, banks, real estate and land agents, health and fitness centre, service station, hair and beauty salons. Occupancy rates are high throughout the retail centre.

Throughout Mundaring most of the townships have local retail areas varying in size and range catering for the local residents, visitors and passing customers. Those retail centres vary from small malls and local supermarkets to single stores. There are 8 service stations within the Shire of Mundaring, some of which offer shopping facilities; most are located along the Great Eastern Highway with one in Mount Helena.

11.3 Commercial

Commercial businesses operate from many locations in the Shire. Within Mundaring town centre there are businesses based within many of the heritage buildings and in Nichol House in Nichol Street. Commercial businesses operate in the Midvale Business Centre, this industrial and commercial trading estate and neighbouring area is well suited to providing premises and services required by businesses ranging from sole operator to medium sized enterprises. There are more opportunities for commercial expansion and development in this area than currently exists within the town site of Mundaring.

In addition to the commercial operations described above there are a considerable number of small and home based businesses operating throughout the Shire.

11.4 Business Support

11.4.1 Groups

Support for businesses is provided by a number of organisations and agencies including the Eastern Hills Business Association, Mundaring Tourism Association, East Metro Small Business Centre, Swan Chamber of Commerce and the EMRC. The Shire of Mundaring Business Advisory Group (BAG) which comprises representatives from those organisations and the Shire of Mundaring provides an effective means of communications between Council and the Mundaring business community, advice on issues affecting the business community and input to Council on strategic and policy matters. In addition the BAG provides advocacy in association with Council to enable effective lobbying of State and Federal Government on matters affecting the business community.

11.4.2 Business Directory

A directory of businesses operating within the Shire is hosted on the Shire of Mundaring website. Inclusion on this directory is free but it does require a complete review and redesign to ensure its effectiveness. That review is currently in progress and the directory will be redeveloped as part of the implementation of the content management system planned for early 2009.

11.4.3 Business Guides

Introductory guides to the Shire and new business start-up guides will be developed and distributed via the website and as hard copy with the aim of guiding new businesses through the various legislation and processes required to start a new business.

11.5 Summary

There is a mix of light industrial, commercial, retail and home businesses operating successfully throughout the Shire of Mundaring. However within the two main industrial areas capacity issues are appearing and new opportunities for expansion and the attraction of investment and inward business migration are required. The lack of deep sewerage at the Mundaring Trade Centre inhibits the realisation of the full potential of the existing site but would require considerable infrastructure investment to rectify.

The Shire of Mundaring is an attractive destination for businesses, offering a superb environment, good road access and the hills lifestyle; many local businesses employ local labour. Support structures are in place for businesses and the business community enjoys the support of the Shire in pursuing sustainable economic development.

12 Tourism

The Shire of Mundaring tourism industry is a significant contributor to the economy of the Shire. Offering a range of activities and natural attractions tourism caters for lifestyle activities, food and wine connoisseurs, arts and crafts, walking, cycling and horse riding in some of the most beautiful countryside and forests in Western Australia. Less than one hours drive from the centre of Perth, the area attracts both international and domestic visitors.

Mundaring has a Level 1 Visitor Centre, open 7 days a week, staffed by one full time Manager and 14 volunteers who contribute over 2,000 hours per year. In addition there is also a Visitor Centre run by the Department of Environment and Conservation at the Perth Hills National Parks Centre.

The Visitor Centres work in conjunction with key tourism industry stakeholders to support and promote the tourism industry within Mundaring and the hills. Those stakeholders include the Shire of Mundaring Tourism Association, Tourism Western Australia, Experience Perth, Tourism Australia, Visitor Centres in the Cities of Swan and Armadale, the West Australian Visitors Centre in Perth, EMRC and the Visitor Servicing Regional Advisory Group (VSRAG).

12.1 Visitor numbers – Mundaring and EMRC

The sample size for Mundaring and the EMRC area's is too small to publish annual data and as a result Tourism WA uses a three year rolling average for Mundaring and a two year rolling average for the EMRC. These statistics include all purposes of visit such as holiday/leisure, visiting friends/relatives, business etc.

Shire of Mundaring YE June 2005-2007	
Overnight Visitors	
Domestic	36,300
International	3,700
Total	40,000
Overnight Visitors Nights	
Domestic	115,700
International	87,400
Total	203,100
Average Length of Stay (Nights)	
Domestic	3.2
International	23.6
Total	5.1
Domestic Daytrip Visitors	
Total	302,200

Source: Tourism WA

EMRC YE June 2005-2007	
Overnight Visitors	
Domestic	177,000
Interstate	45,500
International	31,200
Total Visitors	126,850
Overnight Visitors Nights	
Intrastate	455,500
Interstate	327,000
International	790,500
Total	1,573,000
Average Length of Stay (Nights)	
Intrastate	2.6
Interstate	7.2
International	25.3
Total	12.4
Domestic Daytrip Visitors	
Total Domestic Day Trips	1,118,000

12.2 Visitor numbers – Experience Perth Region



Experience Perth implements tourism marketing strategies, co-ordinates tourism industry promotion and services, and supports tourism development within an area that extends from Lancelin and New Norcia in the North, Northam, York and Beverley in the East to Boddington and Preston Beach in the South and South West.

The statistics for visitor numbers provided by Experience Perth offer a wider regional context and allow comparison between the levels of tourism within Mundaring and the region, and their contribution to the economic prosperity of the area.

The average length of stay by visitors in Experience Perth was 6.5 nights:

- Intrastate visitors had an average length of stay of 2.6 nights
- Interstate visitor had an average length of stay of 5.9 nights
- International visitors had an average length of stay of 21.6 nights

	2003	%	2004	%	2005	%	2006	%
Visitors								
Intrastate	2,153,000	61%	2,320,000	62%	1,987,000	58%	2,220,000	58%
Interstate	821,000	23%	841,000	23%	839,000	24%	991,000	26%
International	554,600	16%	571,800	15%	610,400	18%	601,500	16%
Total	3,528,600		3,732,800		3,436,400		3,813,500	
Nights								
Intrastate	5,761,000		6,461,000		5,624,000		5,860,000	
Interstate	5,008,000		5,281,000		6,037,000		5,821,000	
International	10,531,700		11,896,600		12,719,000		12,964,500	
Total	21,300,700		23,638,600		24,380,000		24,646,500	

Estimates of the income received from visitors for the Experience Perth region are shown below.

	2003	2004	2005	2006
Experience Perth - Estimated Visitor Spend (\$millions)				
Intrastate	\$567	\$620	\$581	\$601
Interstate	\$508	\$581	\$651	\$755
International	\$774	\$916	\$995	\$1,065
Total	\$1,850	\$2,117	\$2,227	\$2,421

12.3 Income from Visitors

The significant data for Mundaring is the average number of visitor nights/days per year which for 2005 – 2007 was 505,300 (overnight visitor nights + domestic daytrip visitors). These visitors provide revenue not only for the tourism industry but also for the general economy of the Shire of Mundaring.

In calculating the contribution to the local economy the following assumptions were made⁵:

<ul style="list-style-type: none"> • 25% of overnight stays were in commercial accommodation, e.g. B&B's 	50,775 visitor nights
<ul style="list-style-type: none"> • Each overnight stay was worth \$100 (evening meal, lower end accommodation, breakfast) 	\$5,077,500
<ul style="list-style-type: none"> • 75% of overnight stays were with friends or family 	152,325 visitor nights
<ul style="list-style-type: none"> • Spending \$15 per overnight stay (additional food and refreshments purchased by hosts, refreshments and fuel purchased by the visitors during their day) 	\$2,284,875
<ul style="list-style-type: none"> • Domestic daytrip visitors 	302,200 day visitors
<ul style="list-style-type: none"> • Spend \$10 each per day (refreshments etc) 	\$3,022,000
Total positive effect on local economy	\$10,384,375

When considering this \$10,384,375 direct income to the economy the multiplier effect of that revenue to the local economy should be taken into account. This will then allow an estimation of the indirect revenue/benefit to the local economy.

The multiplier effect:

*"in its simplest form is how many times money spent by a tourist circulates through the economy of a community. Tourism money spent in hotels, cafes, etc., helps create jobs directly within that establishment but also creates jobs indirectly in other parts of the economy; the hotel buys supplies and services from local businesses, which in turn employ workers and buy their supplies and services, some of them locally. The multiplier effect continues until the money eventually 'leaks' from the local economy through spending on goods and services outside of the community."*⁶

⁵ Mundaring Tourism Association – report to the Shire of Mundaring for 1/7/07 to 31/12/07

⁶ Barcelona Field Studies Centre, 2008

12.4 Indirect Income – (Tourism Multipliers)

Tourism Research Australia's publication, "Tourism's contribution to the Australian economy 1997-98 to 2006-07"⁷ describes the direct and indirect contribution of tourism to the Australian economy. From those figures tourism multipliers can be determined to calculate the indirect tourism benefit in terms of revenue and job creation. Whilst these are generic for the whole of the Australian tourism industry they give an indication of the likely benefits to the Shire of Mundaring from the tourism industry. In the following table the Indirect Tourism Multiplier calculates the "extra" benefits above those of the direct tourism income, and the Total Tourism Multiplier is used to calculate the full value of tourism within Mundaring. It should be noted that there are other models and methods of calculating the benefits of tourism to the economy.

Tourism Multiplier Values	Total tourism multiplier	Indirect Tourism Multiplier
Output	1.74	0.74
All employment	12.6	

Source: National Tourism Alliance Submission to the Review of Administrative Arrangements for Tourist Shopping in Australia (http://www.tourismalliance.org/tourismalliance/PDFs/NTA_TourismShoppinReview_Submission.pdf)

This data shows that for every \$1 million of expenditure by tourists (or tourist consumption) a tourism output to the economy was produced of \$1.74 million and 12.6 jobs.

From these figures an estimate of the economic contribution by tourism in the Shire of Mundaring can be reached. Taking the multiplier of 1.74 it can be seen that the initial \$10,384,375 tourism spend actually contributes approximately \$18.06 million and 130 jobs to the overall economy of Mundaring.

		Total Tourism Multiplier	Output
Direct Tourism Revenue/Income	\$10,384,375	1.74	\$18,068,812
All Employment		12.6	130 jobs

Therefore whilst tourism and hospitality operators can be seen as the primary beneficiaries of visitor spending, the benefits to the economy in general are significant with their business success requiring support in many ways including the services of trades-people and materials suppliers. Visitor spending is not confined solely to accommodation, refreshments and fuel, many other businesses throughout the community including newsagents, supermarkets, chemists, and health services benefit from the visitors.

⁷ Tourism Research Australia, 2008, [http://www.tra.australia.com/content/documents/Tourism's%20contribution/Tourism's%20Contribution%202008%20Final%20\(small\).pdf](http://www.tra.australia.com/content/documents/Tourism's%20contribution/Tourism's%20Contribution%202008%20Final%20(small).pdf)

12.5 Tourism Activities

Shopping – For every region in Australia, the most popular leisure activity undertaken by international visitors whilst in Australia was shopping for pleasure.⁸

Wine & Food – Vineyards and wineries are extremely popular with visitors to Mundaring and with local residents. Wine tasting and cellar door sales provide the basis for many people to enjoy time in the Hills and it is estimated that 50% - 60% of winery visitors come from outside of the Shire. Our visitors contribute to the annual wine industry revenue of \$900,000 (2006), in addition to the other attractions they come to visit.

In addition to wine tasting and wine sales some of the wineries have quality restaurants and plans to offer accommodation in the future. There are restaurants, cafes and other food outlets throughout the Shire catering for all tastes including an internationally renowned haute cuisine restaurant, quality cafes and a gourmet delicatessen, a world-prize winning pizza restaurant, tea shops and take-aways.

Nature / Hills Environment - Many of the tourism activities within the Shire of Mundaring are related to nature based activities; visitors come for the hills lifestyle, they are invited to 'share the secret'. Research has shown that 68% of all international visitors to Australia⁹ participated in nature activities. Of those nature visitors the top three nature activities for international visitors were: visiting a National/State Park (68%); visiting wildlife park/zoo/aquarium (58%); visiting botanical and other public gardens (53%).

21% of domestic overnight visitors also included a nature activity in their stay with the top activities being: bushwalking/rainforest walks (52%); visiting National/State Parks (47%); and visiting botanical or other public gardens (19%).

Within Mundaring there are significant walk trails, bike trails and equestrian trails that allow walkers and riders to enjoy the unique flora and fauna of the Hills. The Munda Biddi bike trail, the Bibbulmun track, the Railway Reserves Heritage Trail, Lake Leschenaultia with its walks and beach and the many walks within John Forest National Park are just some of these attractions which are enjoyed by both tourists and residents alike. It can be seen that the Shire of Mundaring has many of the activities and facilities required by international, inter-state, intra-state and local visitors, particularly those seeking lifestyle and nature based recreation, a relaxing, refreshing holiday location.

12.6 Accommodation

Within the Shire of Mundaring there is accommodation available to suit most tastes including hotels, bed and breakfast establishments and camp sites including a site on the banks of Lake Leschenaultia. However availability at weekends can be problematic particularly when concerts and events are being staged, for example at the Mundaring Weir Hotel. In addition several established Bed and Breakfast establishments have changed, or are about to change owners with some uncertainty about their continuing the businesses in the future. New business start-ups are required in order to address accommodation shortfalls and the shortage of development land.

⁸ "Review of Tourist Shopping Arrangements in Australia" 2005, p8. National Tourism Alliance

⁹ Tourism Research Australia <http://www.tra.australia.com/content/documents/Snapshots/Ecotourism.pdf>
http://www.tra.australia.com/content/documents/Snapshots/2007/nature_factsht.pdf

12.7 Summary of Tourism

Tourism is an important industry within Western Australia and the Shire of Mundaring. Whilst the total input to the local economy has been estimated at circa \$18,000,000 per year Mundaring tourism should also be viewed within a regional, state and national context. The Mundaring tourism industry enjoys the support of such organisations as the EMRC, Tourism WA, Experience Perth and other tourism industry marketing and development groups; in addition links exist with neighbouring councils, visitor centres and other tourism operators. Regional promotion and marketing initiatives are carried out that directly benefit Mundaring, and in turn Mundaring supports the efforts of other councils. Therefore it can be seen that in addition to the input to Mundaring's economy our tourism efforts create and reinforce inputs throughout the region.

The current global economic downturn is forecast to affect international visitor numbers, the distance that Australian visitors will travel for a holiday, and the amount of money people have available to spend on holidays. Mundaring tourism should now seek the advantages of this situation and strive to attract more inter-state and intra-state visitors, tailoring tourism product to meet the changes in demand, i.e. such aspects as cost, length of stay, accessibility.

The popularity of Mundaring as a tourism destination can be seen when comparing the visitor data of Mundaring to that of all the 6 EMRC member councils, Mundaring attracts 31% of EMRC visitors staying overnight and 27% of day trip visitors. The current economic climate is already having effects on tourism throughout Australia, Mundaring's location close to Perth can be viewed as an advantage and provides the opportunity for Mundaring tourism to benefit from people who may now choose to 'holiday close to home' whilst still enjoying a completely different environment.

Tourism operators provide accommodation, catering, attractions and servicing for visitors throughout Mundaring, ranging from internationally renowned restaurants to small cafes, from hotels to boutique bed and breakfast and from the might of the Mundaring Weir and the Golden Pipeline to native wildlife sanctuaries. A level one accredited Visitor Centre, one of only 11 within the Experience Perth region, operates within Mundaring from the old school house. Staffed by one full time manager and 14 volunteers, the visitor centre operates under the Mundaring Tourism Association with operational funding provided by the Shire of Mundaring.

Visitor accommodation includes camp sites, bed and breakfast and hotels, and there is one caravan park, however the majority of pitches at that are taken by long stay guests. The camping facilities within Mundaring are available at Lake Leschenaultia in Chidlow, the Perth Hills National Parks Centre near Mundaring Weir, the Hills Forest YHA and there are limited facilities at Bibbulmun Track huts within the Shire. All of those are beautiful locations and the Lake site, which is owned and operated by the Shire, provides a significant range of facilities for campers. However there still remains an acute shortage of camping pitches during the busy periods, particularly during school holidays. A lack of caravan sites should be seen as a significant missed opportunity in view of our location, in addition to attracting visitors from the region to choose the area as a holiday destination, caravaners heading east would be likely to use the area for short stays at the beginning or end of their trips. Most other tourism areas welcome caravan holidaymakers, realising that caravan owners often fall into the demographic bands of higher disposable income. Similarly more tent campsites could be established to cater for campers, walkers and cyclists.

Bed and breakfast operators provide for visitors with accommodation ranging from comfortable basic rooms to luxury retreats whilst hotel accommodation is limited, it would appear that there is a lack of 3 star plus hotel style accommodation. Weekend accommodation, particularly when events are being held within the Shire, is often quickly booked up, whilst week-night vacancy rates can be high.

13 Rural Industry

13.1 Agriculture, Horticulture and Forestry

Rural industry within the Shire of Mundaring includes Agriculture, Forestry and Logging, Horticulture and Viticulture.

Approximately 8,834 hectares within Mundaring are dedicated to agricultural and horticultural usage¹⁰, employing 183 people accounting for 1.1% of the Shire of Mundaring workforce.

The land use is distributed as follows:

- Under crop, vegetables, fruit, nuts, broad acre crops, grapes or nurseries 583 ha
- Fallow 2123ha
- Grazing 3969ha
- Remnant vegetation and woodland not suitable for grazing 1727ha
- Wetlands or swamps not suitable for grazing 27ha
- Environmentally sensitive areas fenced out of production 67ha
- Houses, sheds and other agricultural unproductive land 272ha

The Agricultural Census 2001 estimated that the Shire of Mundaring had an Agricultural output of \$3.7 million per annum comprised of livestock products (\$0.9m), livestock slaughtered (\$1.2m) and crops (\$1.6m). *At the time of writing this document Agricultural Census 2006 Production Values have not been released for Local Authority areas.*

Horticulture provides a wide variety of crops and products including vegetables, cut flowers, turf, nuts, orchard fruit; citrus, apples and various stone fruits, avocados and mangoes.

Forestry and logging were the industries on which much of Mundaring, its towns and villages were initially built. With widespread forests throughout the area many timber mills were set up to service the demand for timber and the original transport infrastructure development was driven by this industry. The vestiges of those early years can still be found in building and place names, as well as many remaining artefacts.

The Department of Environment and Conservation (DEC) manage the majority of national parks and associated native forestry areas, providing employment and ensuring sound ecological principals are followed to ensure the future of the forests and the significant environmental benefits enjoyed by the area are maintained. This area includes the water catchment for the Mundaring Dam which services so much of the surrounding areas including the goldfields via the "Golden Pipeline", the national asset constructed by C.Y. O'Connor in the 19th century.

Within the Shire of Mundaring there are commercial plantations at Beraking (the northern tip), Helena, Wellbucket and Gorrie managed and harvested by the Forest Products Commission. The timber from these plantations is used to supply logs for Laminated Veneer and Medium Density Fibreboard to associated mills in Neerabup and Welshpool.

The 265ha Beraking plantation suffered extensive damage during the Perth Hills Fire of 2005 but has subsequently undergone replanting of over 418ha with continued replanting planned. The production value for the Beraking plantation in 2006/07 was approximately \$230,000.

¹⁰ 2006/7 ABS Agricultural Survey

During the 2008/09 planting season, approximately 137ha of additional pines will be established in the Shire of Mundaring on private land owned by the Water Corporation, with the Forest Products Commission signing a profit a prendre agreement with the Water Corporation to secure the ownership of the trees.¹¹

13.2 Wine Production and Vineyards¹²

Wine production in the Shire of Mundaring is based on the production of grapes by a number of boutique vineyards located throughout Mundaring. The quality of wine produced has improved significantly over the years as growers access the latest techniques available in wine production, and the Perth Hills region has an excellent reputation for high quality wine.

The vineyards and wineries attract many visitors with their combination of wine tasting, cellar door sales, food and beautiful surroundings all of which complement the tourism industry. With 50% – 60% of the visitors coming from outside of Mundaring it can be seen that the wine industry plays a significant part within the local economy.

In 2006 grape production was estimated at 92.5 tonnes producing approximately 60,000 bottles of wine; the principal varieties of wine being Cabernet Sauvignon, Merlot and Shiraz (total of 32,500 bottles of red wine) and Chardonnay, Semillon and Verdelho (total of 27,500 bottles of white wine). There is the potential for the vineyards to increase grape production to 120-130 tonnes in the future by employing a variety of vineyard management techniques but several of the vineyards are small businesses and may choose to continue producing their grapes in their traditional manner rather than make such changes.

The market for the wines is primarily within Australia with strong local and tourist sales, and a limited export market by a few of the wineries. The production value of the wines for 2006, based on an average retail price per bottle of \$15.00, was \$900,000; however this does not take into account the value of revenue from restaurants and accommodation which are offered by some wineries. In addition part time seasonal labour requirements and full time employees other than the owner operators provide the equivalent of approximately 6 full time jobs.

13.3 Summary of Rural Industries

The agriculture gross production value for all of Western Australia was \$4,988 million in 2006-2007 whilst in 2002-2003 that value was \$4,550 million. In 2001 agriculture gross production values for the Shire of Mundaring was \$3.7 million, demonstrating the lack of intensive production within Mundaring. There are many hobby farms throughout the area but it appears there are fewer commercial enterprises; this confirms the appeal of the lifestyle options to residents and visitors.

Producing an estimated \$900,000 the vineyards and wineries of the Shire are important assets to the economy and particularly to the tourism industry. Producing a variety of high quality wines for the Australian and export markets, supporting tourism and providing employment opportunities they complement the hills environment.

Mundaring has significant forests situated within several National Parks and other DEC managed areas, however forestry as a primary industry is restricted to the commercial plantations managed by the Forest Products Commission.

Employment within agriculture and other rural industries accounts for only 1.1% of the working population within the Shire of Mundaring.

¹¹ John Clarke, Executive Officer, Operations, Forest Products Commission, WA

¹² P Bertola, Perth Hills Vignerons Association.

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15 Appendices

Appendix i.

Shire of Mundaring postcodes			
Postcode	Township within the Shire of Mundaring	Townships outside of the Shire of Mundaring	
6056	Boya Greenmount Helena Valley Midvale Swan View	Bellevue Baskerville Koongamia Jane Brook Herne Hill Middle Swan	Midland Millendon Red Hill Stratton Viveash Woodbridge
6070	Darlington		
6071	Glen Forrest Hovea		
6072	Mahogany Creek		
6073	Mundaring		
6074	Sawyers Valley		
6081	Parkerville Stoneville		
6082	Mount Helena		
6556	Beechina Chidlow Gorrie Malmalling The Lakes		
6558	Wooroloo		

SECTION 3 – KEY OBJECTIVES & STRATEGIES

16 Key Strategic Directions

Shire purpose:

To work within the community to provide leadership and services which sustain and enhance a diverse quality of life.

Shire vision:

A vibrant community that provides opportunities and support for people to enjoy a rich mix of sustainable hills lifestyles.

Shire role:

A professional organisation where people enjoy working together with the community.

The Shire of Mundaring's vision and strategic plan will be supported by the following key themes and objectives of the economic development strategy:

- ❑ **Development**
Encourage sustainable development and effective land use.
- ❑ **Marketing and Branding**
Develop a comprehensive marketing strategy for the Shire of Mundaring.
- ❑ **Employment and Skills Development**
Foster the development of a sustainable local labour market that meets the employment needs of ratepayers and local businesses.
- ❑ **Transport**
Improve access to public transport within the Shire of Mundaring.
- ❑ **Tourism**
Develop and promote the tourism industry within the Shire of Mundaring in order to achieve greater tourism yield.
- ❑ **Business Development**
Actively promote and support the development of business and industry within the Shire of Mundaring to meet the demands and expectations of the local economy.
- ❑ **Business Support and Facilitation**
Provide business support and facilitation

17 Key Themes – Action Plans

17.1 Key Theme 1: Development

“The Shire is confronted with real challenges in encouraging appropriate development. It needs to demonstrate a developed sensitivity to protecting the natural environment of this hills region at the same time as it encourages sustainable development”

Source: Shire of Mundaring – Strategic Directions 2007-2010.

Industrial, commercial and residential developments are significant contributors to economic growth and the future prosperity of the Shire which must support existing and future populations, industry and commerce and provide community services. Without development the economy will decline and with that decline the hills lifestyle that is so prized will be jeopardised. The key parts of any development are sustainability and balance to ensure effective land use, supporting the growth of the population whilst maintaining the hills lifestyle.

There is a lack of new business development within the Shire and one of the main reasons for this is the shortage of available industrial and commercial land or premises and inadequate infrastructure provision, particularly wastewater treatment capacity. There is also a reluctance to accept new development within the hills by some existing residents.

The current Town Planning Scheme 3 is under review. The result of that review will be Town Planning Scheme 4 which will provide direction for future development. In addition application and processing of planning and building approvals will be clarified.

Action Plan 1 - Development

Objective 1.1 Encourage sustainable development and effective land use.

Action	Priority	Additional Financial Resources required
1. Finalise Town Planning Scheme 4 & Local Planning Scheme	High	Within existing resources
2. Identify land suitable for new industrial/commercial development	High	Within existing resources
3. In conjunction with the completion of the TPS4 deliver an educational and consultation process on the TPS4 and supporting ethos	High	Within existing resources
4. Develop partnerships with Tourism WA, neighbouring councils and key stakeholders to match potential investors with suitable available land.	Medium	Within existing resources
5. Promote the opportunities within the Shire for new or relocating businesses	Medium	To be determined
6. Investigate the development of an online “one stop shop” facility for approvals and new business start ups.	Medium	To be determined
7. Identify land suitable for development as caravan parks / camping sites	Medium	Within existing resources
8. Support expansion of wastewater treatment capacity in Mundaring to facilitate commercial development	Medium	Within existing resources

17.2 Key Theme 2: Marketing and Branding

Whilst the population growth rate of the Shire of Mundaring has declined over the past 15 years, future forecasts are for a reversal of that trend by 2021 with a shift in the population age composition as the proportion of the population over 65 years of age increases.

The attraction of skilled workers to the Shire as residents, particularly with younger families, is important to maintain and expand our workforce and achieve a resident population that is balanced in terms of age composition and workforce skills. With a high proportion of the current workforce employed outside of the Shire boundaries, local businesses have a large potential labour force available. Attracting local workers to local based employment will strengthen the economy and help maintain the balance within our population.

Business confidence and investment in business, infrastructure and property are significant factors in the maintenance of employment opportunities, residents' standard of living and the ability of the Shire to provide community services.

A comprehensive marketing strategy will support the maximisation of the Shire businesses, industry and tourism, increase visitor numbers, provide for greater communication between the Shire and the community, and promote the Shire to potential investors and new residents.

Branding is the way that the world perceives a product or service and it is vital that the brand is recognised and represents the values of the organisation and of the community. A brand has many facets ranging from a logo to the way people interact. The brand of the Shire of Mundaring represents not only the services provided by the Shire but the ethos and lifestyle of the Shire, its residents, communities, businesses and tourism opportunities. This conception of the Shire, its "public face", creates brand awareness amongst all those that come into contact with it and brand awareness plays a major part in successful marketing. To ensure the proposed marketing strategy is effective the existing Shire of Mundaring brand should be reviewed and redefined if necessary.

Action Plan 2 – Marketing and Branding

Objective 2.1 Develop a comprehensive marketing strategy for the Shire of Mundaring

Action	Priority	Additional Financial Resources required
1. Undertake a branding process for the Shire of Mundaring	High	\$40,000
2. Develop an internal/external marketing strategy for Mundaring. (The whole of the Shire)	High	\$30,000
3. Implement the marketing strategy	Medium	\$20,000 per annum
4. Develop and implement a Business to Business marketing strategy	Medium	(Within the \$30,000 to \$40,000 as per Action 2.1.2 – <i>Develop an internal/external marketing strategy...</i>)

17.3 Key Theme 3: Employment and Skills Development

Sustained population growth is essential for the economic development of any area, with the levels of population growth having a direct impact on the public and private investment in that area attracting new expertise, innovation and business development. It is imperative that the resident workforce is retained and developed and that growth in the Shire of Mundaring's local employment opportunities is recognised as vital to sustaining future population growth and alleviating the forecasted shift in age composition of the population.

Without an increase in employment opportunities the attraction of skilled inward migration and the associated economic growth may slow. An ageing population increases demands on services and reduces demands on business and commerce resulting in reductions to inward migration, business development and enterprise; essentially the economic development of the areas slows down. To attract and retain a strong resident workforce it is vital to develop and promote the local labour market as employers of choice for our residents. The Shire of Mundaring pursues this 'Employer of Choice' aim very successfully and endeavours to employ local residents if possible.

The unemployment rate for our residents has fallen steadily to 3.2% in 2006 out of a total labour force of 16,862, however only 4,255 of that labour force are employed within the Shire boundaries. Therefore over 12,000 Shire residents are employed outside of the Shire and within that number significant potential exists for the development of local employment and business.

Improving the skills base of residents through targeted education and training programs will support the future labour skills requirements of public and private enterprise in Mundaring; however the location of training establishments can be problematic for the unemployed, low income earners and school leavers due to the lack of adequate public transport provision.

A comprehensive review of the labour market should be conducted to ascertain the current and projected needs of business and the current local labour market situation. Training providers should be identified and improved access to training and other support services made available. A directory of employment and training services should be developed in conjunction with key stakeholders. Strategies should be investigated to encourage skilled migrants to choose Mundaring as a lifestyle choice and to promote the Shire to new business and investors.

Reducing retail leakage (Shire residents doing their business outside of the Shire due to lack of local businesses meeting their needs) and employment leakage (Shire residents working outside of the Shire because a suitable employment opportunity isn't available locally) could generate local economic development by capitalising on the existing population. Ensuring that the local businesses and local employment opportunities exist is a strong incentive for retaining and building our local population.

Action Plan 3 Employment and Skills Development

Objective 3.1 Foster the development of a sustainable local labour market that meets the employment needs of ratepayers and local businesses

Action	Priority	Additional Financial Resources required
1. Develop a clear understanding of the business environment within the Shire of Mundaring and of current and future labour needs: 1.1. Gather information and data from State and Federal governments, employment education and training providers, and local businesses to ascertain current and future labour market needs and opportunities	High High (concurrent)	Within existing resources Within existing resources
2. Work in partnership with business, employment, education and training providers, State and Federal governments to identify and promote services available to business and the local career and employment opportunities available to residents	Medium(annual)	\$2,000 per annum
3. Incorporate information on services, career and employment opportunities in the Shire website	Medium	Within existing resources
4. Promote the Shire as a lifestyle choice to skilled migrants and business migrants through relevant channels including: <ul style="list-style-type: none"> • Migration agents • Office of Multicultural Interest • Department of Immigration 	Low	Within existing resources

17.4 Key Theme 4: Transport

The Shire of Mundaring is a predominantly rural area extending over 644 square kilometres and comprising a number of dispersed townships and communities in which the only public transport provision is by Transperth bus services. With the nearest train station at Midland and 12,000 of our resident workforce employed outside of the Shire, public transport provision is inadequate and fails to meet the needs of many of the residents. The bus service falls far short of that enjoyed by neighbouring areas such as Swan and Bassendean, with Mundaring receiving a minimal peak period service with very few buses during the day. This affects not only the workforce but restricts access to many other services required by residents such as attending hospital and doctors' appointments, post offices and shopping. For those members of our community who do not have their own transport the situation is extremely difficult and discriminatory.

Previous approaches to Transperth for an improved or extended transport service have been refused primarily on the grounds of low population density and wide geographical spread. The lack of adequate public transport affects access to education and training opportunities, employment, essential services and leisure pursuits for all sections of our community. Better transport would facilitate increased visitor numbers and raise the quality of life for many people, and a renewed approach to Transperth should be made and further investigations into alternative provision should be commenced.

Action Plan 4 Transport

Objective 4.1: Improve access to public transport within the Shire of Mundaring

Action	Priority	Additional Financial Resources required
1. Support the implementation of the Regional Transport Strategy in conjunction with the EMRC and member Councils	High	Within existing resources
2. Facilitate a review of the existing public transport situation servicing the Shire of Mundaring	High	Within existing resources <i>(Currently being addressed within the Shire of Mundaring Strategic Transport Plan)</i>
3. Develop an action plan to increase access to public transport provision	Medium	To be determined <i>(Currently being addressed within the Shire of Mundaring Strategic Transport Plan)</i>
4. Continue to lobby public transport providers to increase and/or maintain current levels of public transport provision	Medium	Within existing resources
5. Investigate provision of a Shire operated community facility to enhance public transport and stimulate demand	Medium	To be determined <i>(Currently being addressed within the Shire of Mundaring Strategic Transport Plan)</i>

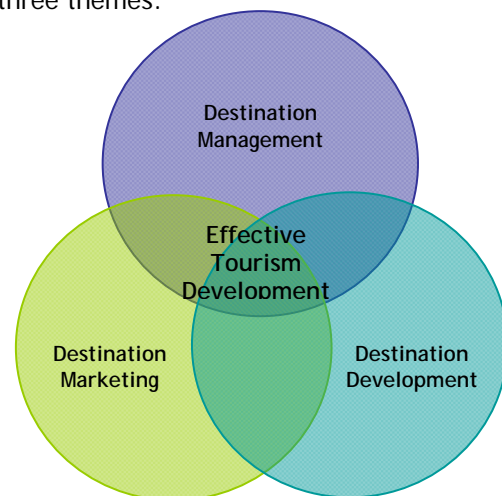
17.5 Key Theme 5: Tourism

The tourism industry within the Shire of Mundaring is an important sector of the local economy and the Perth Hills is an integral part of the Perth Eastern Regional Tourism Precinct. The regional strategy for tourism development is focussed on three themes:

- **Destination marketing**
- **Destination development**
- **Destination management.**

Research has shown that regionally there is a need to deliver quality visitor experiences and, to achieve that, a shift in emphasis is required within the three strands giving an increased focus on **destination development and destination management**. Such a focus will then align the region with state and national level directions.

Whilst Mundaring will adopt this approach there exists a significant need for a review of local tourism marketing and the development and application of a comprehensive marketing strategy.



The shift in emphasis will enable a concentration on increasing visitor yield, which requires high quality attractions, accommodation and service, and away from simply increasing visitor numbers. Visitor expectations are building and for tourism operators to be successful they must meet and exceed those expectations.

Individual operators have invested within their businesses but there is a scarcity of options such as camp sites and suitable caravan parks. In view of the location at the start, or end – depending on your direction of travel, of the Great Eastern Highway and the Great Southern Highway, and with all the nature based attractions available, camping and caravan visitors are under resourced. There are initiatives within Tourism WA, including Landbank and Investment Attraction, which would provide support, access to investors and aid in identifying suitable locations for a range of new enterprises including caravan parks which have been identified as an in-demand tourism feature.

In Mundaring there is a level 1 visitor centre, providing information and merchandising local goods to visitors. Funded by a contribution from the Shire through the Mundaring Tourism Association the centre is staffed by paid staff and volunteers. It is recognised that the tourism services provided by the Association could be improved to the benefit of both the tourism industry and visitors but that would require an increase in funding.

The current site of the visitor centre has also been raised as an inhibitor to increasing services; located on the main road through Mundaring access is limited for other than cars, signage restriction on the highway apply, internal space is at a premium and merchandising displays need development.

In order for the Shire to continue to develop as a local, regional and international tourism destination there are several areas that require investigation; strategic planning and marketing implementation including reviewing the visitor centre model, existing and new tourism products and markets, and raising awareness within the community of the contribution tourism makes to the Shire of Mundaring.

Action Plan 5 Tourism

Objective 5.1 Develop and promote the tourism industry within the Shire of Mundaring in order to achieve greater tourism yield.

Destination Management

Action	Priority	Additional Financial Resources required
1. Work with Mundaring Tourism Association to develop a tourism strategic development plan	High	\$25.000
2. Work with Mundaring Tourism Association to review the Mundaring Visitor Centre operation and services in order to improve the tourism services provided by the centre 2.1. Operation and Funding <ul style="list-style-type: none"> • Review alternative funding, management and service delivery models for tourism visitor centres to identify best practice model 2.2. Location and design <ul style="list-style-type: none"> • Identify design, structure and requirements of the visitor centre • Review alternative locations for the Mundaring Visitor Centre • Refer to the Shire of Mundaring Property Investment Committee to identify potential land to site the visitor centre 2.3. Income generation <ul style="list-style-type: none"> • Investigate, identify and implement income generation opportunities for visitor centre 	High	To be determined
3. Identify and develop strategies to increase visitor length of stay, and smooth weekday/weekend variations	Medium	To be determined
4. Support and implement the initiatives of the Perth Hills Tourism Precinct Working Group 4.1. Perth Hills Tourism Precinct Business Plan 4.2. Strategic Assets mapping	High	To be determined
5. Work in conjunction with the EMRC to look at the management and promotion of all trails within the Shire with particular emphasis on the Railway Heritage Reserves Trails.	High	To be determined

Destination Development

Action	Priority	Additional Financial Resources required
6. Investigate inhibitors to tourism development within Shire policies & procedures.	High	Within existing resources
7. In conjunction with Mundaring and Hills Historical Society and Mundaring Tourism Association develop cultural and heritage tourism opportunities 7.1. Develop a cultural and heritage tourism strategy (refer to Tourism WA heritage tourism strategy) 7.2. Identify cultural and heritage tourism opportunities 7.3. Support Mundaring and Hills Historical Society and Mundaring Tourism Association in developing cultural and heritage tourism opportunities	High	To be determined
8. Participate in study with key stakeholders including DEC, Water Corp, Shire of Kalamunda and National Trust to determine feasibility of a visitor interpretive facility at the Mundaring Weir Precinct	Medium	Within existing resources
9. Continue consultation and collaboration with other LGAs and businesses, particularly with Shire of Kalamunda (LGA) through such initiatives as the Perth Hills Tourism Precinct Working Group	High	Within existing resources
10. Support the identification of suitable sites for, and the development of, caravan parks <i>(Zoning issues under TPS3 or TPS4 to be considered. High priority but 2-3 yr timescale to implement)</i>	Medium	Within existing resources
11. Develop partnerships with regional councils and other stakeholders to further develop cycle tourism opportunities	High	Within existing resources
12. Develop and implement Perth Hills Trails Master Plan in conjunction with Shire of Kalamunda, DEC, Water Corporation and other key stakeholders	High	To be determined
13. Continue to implement the Railway Reserves Heritage Trail management plan	High (ongoing)	Within existing resources
14. Identify opportunities for new tourism products and tourism infrastructure, particularly those that can be developed in partnership ventures with other stakeholders: <ul style="list-style-type: none"> • Major events • Transport connections (eg to bike and walking trails) • Accommodation • Built attractions 	Medium	To be determined

<ul style="list-style-type: none"> Supporting infrastructure (roads, parking , toilets) 		
15. Pursue eco-Certification from Eco Tourism Australia	Low	Within existing resources
16. In collaboration with key stakeholders investigate the development of a scenic tourism drive trail between Mundaring and Kalamunda <ul style="list-style-type: none"> Investigate funding sources, including DTI and Experience Perth (previous application failed) 	Medium	To be determined

Destination Marketing

Action	Priority	Additional Financial Resources required
17. Develop a comprehensive marketing and promotion strategy for tourism within the Shire of Mundaring, <ul style="list-style-type: none"> Includes identifying primary unique products and experiences, target markets and developing a marketing action plan. 	High	\$40,000
18. Implement the marketing and promotion strategy for tourism within the Shire of Mundaring,	High	\$20,000 per annum
19. Investigate and implement the construction of roadside information bays	Medium	\$40,000
20. Consolidate and build the Perth Hills brand, implement the tourism marketing strategy, incorporating the Perth Hills brand, and raise awareness of the "Perth Hills" as a preferred tourism destination	High	To be determined
21. Work in conjunction with the Mundaring Tourism Association to promote to the local community the value of tourism to the Mundaring economy	Low	Within existing resources
22. Support and implement the initiatives of the Perth Hills Tourism Precinct Working Group: <ul style="list-style-type: none"> Perth Trails Website Perth Hills Calendar & Holiday Planner 	High	Within existing resources
23. Produce high quality media library including photos, descriptive writings and DVD footage	Medium	To be determined
24. Collaborate with key stakeholders to coordinate the marketing strategies of the Shire, the Mundaring Tourism Association, the Perth Hills and the EMRC	Medium	Within existing resources

17.6 Key Theme 6: Business Development

Business competition continues to grow regionally and internationally and Mundaring must ensure that its economy prospers in order to attract inward investment, sustain and develop employment opportunities, and maintain outputs. The attraction of new investment and skilled workers to the Shire of Mundaring is vital for future economic development and active promotion of the business and lifestyle advantages of Mundaring and the Hills should be facilitated to support this.

The significant business areas are the Mundaring Trade Centre and the Midvale Business Centre whilst throughout the Shire small and home based businesses operate, however the full extent of that business sector requires clarification.

Successful development requires consideration of the existing situation in order to plan for future proposals and currently a lack of data on the existing businesses operating within the Shire constrains planning and strategy development. Whilst there are regulations in place and application/licence procedures that should be followed it appears that many businesses, small businesses in particular, have not followed those procedures and simply started operating regardless. A comprehensive review of the businesses operating within the Shire is required to develop a clear, accurate and up to date database of all business operations within the Shire.

It is apparent from the number of enquiries received within the Shire that clarification is required on the procedures for starting a new business and that simplification of those procedures will enable more businesses to start. The development of a support guide for new business start-ups and a clear guide to associated Shire regulations will assist potential business operators.

Industry on both trading estates displays a trend towards similar enterprises locating together, for example Motor Engineers. This aspect should be examined as there may be the potential to develop industry clusters, which have been used effectively in other council areas to develop and strengthen businesses.

Businesses within the Shire require the assistance and support of the Shire to enable them to expand their activities and employment opportunities and, whilst the Eastern Hills Business Association supports their members of the business community, they would benefit from additional support from the Shire; that support may be identified within the proposed Shire marketing strategy. An example of assistance requested by the association is for a new and more effective map and signage at the entrance to the Mundaring Trade Centre, a request that requires approval across various bodies including MainRoads WA. Offering greater exposure of businesses to passing customers, reducing confusion by visitors and providing a professional entrance to the trade centre, this idea could also be considered for the Midvale Business Centre.

With the increasing globalisation of business an investigation of existing and potential import/export opportunities is required. Working with the business association and the EMRC a review could identify, encourage and facilitate Mundaring businesses to benefit from import and export opportunities.

Broadband internet availability within the Shire requires continued review as there are many ADSL black spots and physical limitations which need to be overcome, for example customers on pair gain lines require Telstra to upgrade lines or install extra equipment. Continued lobbying of service providers will be required until these issues are resolved.

Action Plan 6 Business Development

Objective 6.1: Actively promote and support the development of business and industry within the Shire of Mundaring to meet the demands and expectations of the local economy

Action	Priority	Additional Financial Resources required
1. Develop a database of all businesses located within the Shire	High	Within existing resources
2. Develop a support guide for new business start-ups	High	\$1,000 per annum
3. Investigate incentives for businesses relocating to the Shire and new business start-ups within the Shire	High	To be determined
4. Investigate the development of industry clusters	Medium	To be determined
5. Review import/export situation, identify areas for improvement	Low	Within existing resources
6. Promote the opportunities within the Shire for new or relocating businesses and skilled inwards migration, building on the business and lifestyle advantages of Mundaring and the hills	Low	Within existing resources
7. Support action to improve high speed internet access throughout the Shire	High	To be determined
8. Review business start up processes and identify ways to reduce or streamline administrative and compliance requirements <i>(See also: key Theme 1, Development 1.1.6 "One-stop-shop" for approvals and new business start-up.)</i>	Medium	To be determined
9. Work with local business associations to promote and support the development of business and industry	Medium (Ongoing)	Within existing resources
10. Encourage small business networking and mentoring to provide support and assistance for small business operators to expand and continue business.	Medium	\$3,000 per annum
11. Investigate the 'Marketing Midland' strategy and its application to Mundaring.	High	Within existing resources

17.7 Key Theme 7: Business Support and Facilitation

Development of a structure to provide responsive strategic business support will enable Mundaring businesses to operate more effectively, will promote the business and lifestyle advantages of Mundaring and the Hills, stimulating and encouraging investment and skilled inwards migration.

A review of the role, purpose and future plans of the Business Advisory Group, the Eastern Hills Business Association and the Mundaring Tourism Association will ensure their future effectiveness and avoid duplication of effort.

Effective communications within the Shire between the Shire, Mundaring business community and key stakeholders will contribute to the implementation of the economic development strategy. Developing and maintaining links with neighbouring councils and regional organisations will maximise local and regional economic development opportunities.

Shire of Mundaring funding for business and tourism support is limited with support primarily taking the form of services and expertise from the Shire rather than by direct cash contribution, other than the funding for the Mundaring Tourism Visitor Centre. However both tourism and the business community benefit from the Shire's financial contributions to, and membership of, the EMRC.

In view of the restrictions on available funding, the Mundaring Tourism Association wish to investigate alternative sources of income, particularly grant income. For this to be successful they have requested assistance to set up the necessary organisation and training in grant application techniques. It is evident that all sectors of business, tourism and commerce within the Shire would benefit from additional funding but that many individual enterprises lack the time and expertise to seek out such opportunities. The development of a suitable grants and funding opportunities information point providing regularly updated information on a variety of funding sources should be investigated.

Whilst individual enterprises would be responsible for completing their own grant applications the information point could also provide support in the form of "how to" info sheets.

Action Plan 7 Business Support and Facilitation

Objective 7.1 Provide Business Support and Facilitation

Action	Priority	Additional Financial Resources required
1. Investigate support requirements of businesses within the Shire	Medium	Within existing resources
2. Facilitate the promotion of Mundaring and the Hills to encourage investment and inwards skilled migration <i>(This would be an element within the Shire marketing strategy)</i>	Medium	Within existing resources
3. Review the existing business association models, investigate aims and objectives, and identify future plans. 3.1. Explore ways of improving relationships with, effectiveness and capacity of, business associations	High	Within existing resources
4. Clarify and implement communications strategies between the Shire of Mundaring, Business and Tourism Association and other key stakeholders	High	Within existing resources
5. Promote regional co-operation between the Shire of Mundaring and neighbouring organisations to achieve economic development.	Medium	Within existing resources
6. Support the implementation of a centralised access point for grant and funding opportunities, for businesses within the Shire of Mundaring.	Medium	Within existing resources
7. Develop and deliver grant application workshops to Shire of Mundaring businesses	Low	\$1,000 per annum