

Tourism Destination Marketing Strategy



October 2010

CONTENTS

1. Executive Summary	3
2. Introduction and Objectives	5
3. Definition of tourism and tourists	6
4. Tourism influences & trends	8
5. Current & potential visitor markets	9
6. SWOT Analysis	10
7. Product/Destination audit	13
8. Customer analysis and expectations	23
9. Perceptions and image	23
10. Marketing	25
(a) Branding	25
(b) Signage	26
(c) Promotional/product opportunities	27
(d) Public Relations	28
11. Organisation Structure & Industry	28
12. Strategies	29
13. Action plan	35
Appendix A. Metropolitan Perth Tourism Survey	50
Appendix B. Visitor Centre Survey	90

Disclaimer

Kirkgate Consulting has prepared this report for use of its clients only. The material contained in this report is of a general nature only, and neither purports, nor is intended, to be specific advice on any particular matter other than general advice relating to the client for which the report was prepared. No person should act on the basis of any matter contained in this report without taking appropriate professional advice relating to their own particular circumstances. Apart from providing advice of a general nature for the purposes of the client for which this report was prepared, Kirkgate Consulting expressly disclaims any liability to any person in respect of anything done or omitted to be done of and as a consequence of anything contained in this report.

Prepared by:

David Duncanson	Eddie Watling	Terry Penn	Ian Mackenzie
Kirkgate Consulting	Tourism Coordinates	Tourism Coordinates	Asset research

1. Executive Summary

The City of Armadale recognises the growing importance of tourism to the local economy and in order to manage the City's response has commissioned this Tourism Destination Marketing Strategy. Armadale has never been recognised as a major tourism destination in the Perth Metropolitan Region and does not compete with the mature destinations such as Fremantle and the Swan Valley however there are some well known and long established attractions such as Araluen Botanic Gardens, Elizabethan Village, Cohunu Koala Park and Pioneer Village located within the area.

In developing this strategy a telephone survey of 400 random households in the Perth metropolitan area was conducted which confirmed that Armadale was viewed as a day trip destination but would not be the number one choice. It was also clear that many respondents had not visited Armadale for a considerable period of time so have not witnessed the extremely positive changes that have taken place particularly in the city centre over the past couple of years. Therefore the general thrust of this strategy is to build upon the day trip market and in particular the Visiting Friends and Relatives market and get them to experience the range of activities on offer.

It is apparent that tourism in Armadale is lacking leadership and direction and that the main focus has been on the Armadale Visitor Centre which is delivering services beyond the normal range for a Visitor Centre therefore recommendations are made to create a tourism officer position not only to coordinate the findings of this strategy but to act as a point of contact with the industry. The operators within the industry need to come together and work with the City to achieve more positive outcomes. With the finishing of the Armadale redevelopment Authority in June 2011 the City needs to address its overall approach to economic development of which tourism is just one aspect.

By far the biggest recent development in the area with real tourism potential is Champion Lakes however in its current format there will be limited benefits to the local economy, with visitors driving in to attend events then going away again. The City's role should be in supporting the white water park proposal, supporting the attraction of new events and supporting new short term accommodation.

Physically there are a number of areas that need to be addressed. Many visitors arrive by train and the Jull Street Mall is the first impression of Armadale that they get. This area does not work as a Mall due to a lack of people and general activity and should be reinstated as a through road open to vehicular traffic. In addition there is a need for improved urban design and the attraction of new retail outlets to revitalise the area. Signage throughout the area, not just in the CBD is confusing and misleading. There is still signage promoting the Heritage Country which was a name used to promoted the area a number of years ago and there is signage which is in the wrong place and signage which is obscured by bushes and trees.

Branding is another area which requires urgent attention and a consistent approach to what is being used. While the City of Armadale has its own brand which incorporates the 'Armadale Alive' tag line there have been a number of other tag lines used in recent years which dilutes the impact and confuses the target market. However developing a new brand from scratch is an expensive exercise and therefore it is suggested that the 'Armadale Alive' brand be built upon and adapted where necessary so that it can be used for the tourist market.

With regards to general marketing and promotion the focus should be on particular target markets which already exist and building those markets to a consistent and significant level. Of particular relevance is the visiting friends and relatives market where Armadale can be promoted as an alternative to a day at the beach. In addition the fact that Armadale is at the confluence of three major roads from the south and east presents a geographical market along those routes. Armadale is the first place in the metropolitan area that people travelling along these routes come to so should promote itself as the convenient destination for shopping and regional services. Working with the tourism industry will maximise the effectiveness of limited resources and for certain markets packages should be developed to encourage overnight stays and day visits.

Armadale hosts a number of significant events throughout the year some of which such as the Highland games attract people from throughout the metropolitan area and beyond. Research has shown that in terms of economic development events can have a significant positive impact. Efforts should be made to attract new events to the area through working with local groups to build on what already exists.

The effective use of the media can raise the profile of an area without requiring the allocation of significant resources. Given that Armadale has many aspects that are relatively unknown (even by its own residents) there is scope to raise awareness locally and throughout the metropolitan area of the many positive aspect of the area.

Key strategies include:

- Manage and give direction to tourism within an economic development framework
- Work with others to cooperatively develop and promote the Armadale tourism industry
- Maximise visitation by promoting Armadale as the place to shop
- Encourage the local tourism industry to develop packages and target specific markets
- Prepare a revitalisation program for the Armadale Railway Station/CBD precinct
- Develop and implement a signage strategy
- Support Champion Lakes to attract national and international events which will raise the profile of Armadale
- Build a suite of year round events to attract visitors
- Develop a tourism brand for Armadale building on the City's corporate brand
- Position Armadale as the first stop in the Metropolitan Region for travellers from the south
- Maximise the economic impact from the visiting friends & relatives market
- Maximise positive media coverage of Armadale

2. Introduction and Objectives

The City of Armadale is located in Perth's south-east suburbs, about 28 kilometres from the Perth CBD. The City of Armadale is bounded by the City of Gosnells and the Shire of Kalamunda in the north, the Shires of York and Beverley in the east, the Shire of Wandering and Serpentine Jarrahdale Shire in the south and the City of Cockburn in the west.

The City of Armadale is a residential, semi-rural and rural area. The main urban areas are in and around the suburb of Armadale, including the foothills of Kelmscott, Mount Nasura, Mount Richon, Seville Grove and Westfield. The City encompasses a total land area of 545 square kilometres, including many parks, reserves and state forests. Armadale is thought to be named after a place in Scotland.

The purpose of the Tourism Destination Marketing Strategy is to effectively enable the City to direct and manage the economic benefit of tourism. It will enable the development of tourism branding and tags that are consistent across the whole of the City's tourism and corporate marketing and promotional campaigns.

Whilst the City's key focus is currently Visitor Servicing, the Tourism Destination Marketing Plan will formalize the relationship of the role between the Visitor Centre and the possible broader and strategic role of tourism development, which is not simply marketing or visitor servicing. Tourism development is one element of overall economic development which has already been identified in the City's draft Strategic Plan 2011 – 2014.

In January 2006, the City made a major commitment to tourism in the district when it took over management and operational control of the Armadale Visitor Centre from the Heritage Country Tourism Association Inc. and employed a full time Visitor Centre Coordinator. The Armadale Visitor Centre achieved its Level One Accreditation in 2007. In taking over management and operational responsibility of the Visitor Centre, it had become apparent that tourism did offer some major opportunities for the City in its promotion and marketing both locally, nationally and internationally, which was one of Council's visions as expressed in its Strategic Plan.

The primary purpose of the Tourism Destination Marketing Strategy is to identify opportunities that will result in a growth in tourism within the City of Armadale and more broadly through the south-eastern corridor of Perth. In short it should:

- Provide the City of Armadale with a greater understanding of the resource requirements (capital and people) to develop the tourism opportunity that exists within the district by nature of its location, and within the best possible organizational structure within the City.
- Offer an improved approach to the future planning and development of the tourism product through stronger partnerships, both internal (the City's Public Relations and Planning Departments) and external (industry and government).
- Provide a roadmap for delivery of the Plan with established priorities, timeline KPIs and indicative budget.

3. Definition of Tourism and Tourists

Wikipedia - Tourism is [travel](#) for [recreational](#), [leisure](#) or [business](#) purposes. The [World Tourism Organization](#) (WTO) defines **tourists** as people who "travel to and stay in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited"

The question is, does this definition fit with tourism in Armadale where a number of factors such as restricted accommodation, limited types of activities and surrounding demographics come into play. Also, this definition does not take into account the day-visitor market, which, whilst more difficult to quantify, is undoubtedly the largest source of visitors to the region.

The Domestic Day Trip Definition is: Day trips or same day visitors are those who travel for a round trip distance of at least 50km, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded as is routine travel such as commuting between work/school and home. Routine shopping is included as is travel for all purposes, not just pleasure.

In regard to the overnight stay component of the market, it is important to consider current statistics in order to understand tourism in the Armadale context. The following tables show purpose of the visit and top three types of accommodation in relation to Armadale.

PURPOSE OF THE VISIT		
	YE Dec 2007/08/09 Average Annual Visitors	YE Dec 2007/08/09 %
Estimated Domestic Visitors		
Visiting friends & relatives	22,000	67%
Holiday or leisure	5,000	15%
Business	2,000	6%
Other	4,000	12%
Total	32,700	-
Visiting friends & relatives	3,500	71%
Holiday/pleasure	1,200	24%
Other	300	5%
Total	4,900	-

Source Tourism WA

TOP THREE TYPES OF VISITOR ACCOMMODATION		
	YE Dec 2007/08/09 Average Annual Visitors	YE Dec 2007/08/09 %
Estimated domestic visitors		
Friends or relatives property	28,300	87%
Hotel resort, motel or motor inn	2,000	6%
Caravan / camping on private property	1,000	3%
Estimated International Visitors		
Home of friend or relative	4,000	82%
Guest house / bed and breakfast	400*	8%

Source Tourism WA

Clearly the highest percentage of overnight visitors to the Armadale region are those visiting friends and relatives (VFR) and who stay privately with the host friends and relatives - 67% of all overnight visitors are the VFR market, with 87% of all overnight stays being in private accommodation i.e. friends or relatives property.

The VFR market undoubtedly contributes to the high level of visitors staying in private accommodation, however, the overall shortage of hotel/motel style facilities in Armadale might in itself, also be a reason for the small percentage of overnight visitors using this style of accommodation.

In many ways this represents the classic "Catch 22" situation in that there are limited hotel/motel facilities because the market is not seen to be there and the market is not there because there are no suitable facilities.

Importantly though, the limited availability of hotel/motel facilities is not a major drawback for tourism development in the region as there is an adequate supply and range of accommodation just a short distance away in Perth and throughout the wider metropolitan area. This means that visitors (be they local or out-of-State) can be accommodated elsewhere and visit Armadale on a day visitor basis, further emphasising the importance of focusing on, and catering for, the day visitor market.

Whilst there is little data available on the day visitor market the fact is that the Experience Perth Region, of which Armadale is a part, is estimated to have generated an average 8.8 million day visits per annum over the years 2007, 2008 and 2009, evidencing the size and importance of this market segment.

It is therefore more appropriate to view tourism in Armadale in the context of visitors, rather than by the formal WTO tourism definition.

Therefore it can be concluded that the definition of a tourist in Armadale should be:

Visitors, either on an overnight stay or day visitor basis, who travel to and throughout the Armadale region for leisure, business or other purposes, where that travel takes the visitor outside their usual environment for at least 4 hours and involves a round trip distance of at least 50km.

4. Tourism influences & trends

Tourism is subject to a range of influences and events, local, national and global that can directly impact on the sustainability of the local industry. These influences and trends can come in a number of forms and generally speaking can be grouped in the following areas.

Competitive
 Social & Cultural Natural environment
 Economic
 Technology
 Political & legal
 Tourism industry

The Tourism WA latest quarterly Tourism Snapshot to March 2010 indicates that at a global level there has been an upswing in global tourism activity of 7.1% January to February 2010 compared to the same period in 2009. However this full growth was not reflected in the growth for Australia which recorded only a 2.6% increase in visitors with Western Australia recording similar levels. International growth came predominantly from the visiting friend and relatives market and education. In terms of source markets the major international growth came from Malaysia and Singapore.

	YE March 2009	YE March 2010	% Change YE Mar 10 – YE Mar 09	3 Year AAGR*
WA Intrastate Visitors				
Holiday or leisure	2,152,000	1,814,000	-15.7%	-13.0%
Visiting friends and relatives (VFR)	1,355,000	1,201,000	-11.4%	-11.0%
Business	833,000	708,000	-21.6%	-12.3%
Other	292,000	229,000	-21.6%	-15.7%
Australian Intrastate Visitors				
Holiday or Leisure	21,896,000	21,405,000	-2.2%	-5.2%
Visiting friends and Relatives (VFR)	15,485,000	14,831,000	-4.2%	-9.0%
Business	6,847,000	6,613,000	-3.4%	-6.6%
Other	2,544,000	2,586,000	1.7%	-4.2%

• AAGR = Average Annual Growth Rate

The general trend for interstate visitors is also down although accurate figures are not currently available due to a change in collection procedures.

One encouraging trend is the growth in the international visitors - visiting friends & relatives market which has increased by 30,500 in the year to March 2010. The following table taken from the

Tourism Research Australia, International Visitor Survey supports the increase in the international Visiting Friends & Relatives market.

	YE March 2009	YE March 2010	% Change YE Mar 10 – YE Mar 09	3 Year AAGR*
WA International Visitors				
Holiday/ pleasure	333,500	327,300	-1.9%	-2.7%
Visiting friends & relatives	250,200	280,700	12.2%	2.3%
Business	100,200	94,000	-6.2%	2.8%
Education	39,100	47,100	20.6%	2.7%
Other	53,000	52,700	-0.5%	8.3%
Australian International Visitors				
Holiday/ pleasure	2,807,800	2,824,200	-0.6%	-3.1%
Visiting friends & relatives	1,785,200	1,920,000	7.5%	2.2%
Business	881,500	816,300	-7.4%	-2.4%
Education	412,300	461,500	9.5%	1.7%
Other	581,600	574,600	-1.2%	4.7%

Research has shown that a significant grouping for day and overnight stays for the Armadale market is the Visiting Friends & Relatives market. In regards to Intrastate visitors the VFR market dropped significantly in early 2010 to give a Year end March 2010 decline of minus 11.4%, Interstate VFR declined by 2% however international VFR visitors increased by 12.2%.

There are a number of reasons for the latest trends but it is accepted that the Western Australian market is particularly affected by the favourable exchange rate and the large number of low cost flights to Bali.

5. Current & Potential Visitor Markets

As identified earlier in this report, the current major visitor market segment for the Armadale region is the day visitor, primarily from the local domestic market.

While there is little available data to further break down this market segment, there is sufficient evidence from the telephone survey data (Appendix A) collected during this study to make the following observations:

- There is a relatively low identification factor of the tourist attractions/facilities of the region;
- A high percentage of the Perth market has is yet to develop an impression of the region;
- A high percentage of the Perth market has not visited the region within the past year and are therefore unaware of recent improvements to the City Centre;
- Araluen Botanic park, Elizabethan Village and Champion Lakes are the most identified attractions of the region;
- Events are seen as a major motivating factor for a visit to the region;
- Distance and things to do and see are the prime motivating factors for day trippers considering a visit to the region;

- Over 80% of the potential local day tripper market is either undecided or unlikely to undertake a day trip to the region;
- Family groups represent 50% of the current day visitor market;
- 50% of the market is interested in major events or shopping as a motivator for a visit to the region;

The day visitor market will continue to be the predominant source of visitors to the Armadale region, not only from the local market, but from interstate and international visitors who are accommodated outside of the region.

The VFR and bed and breakfast market segments will continue to form the largest proportion of the overnight stay visitors. Both these segments have the potential to be further developed through marketing initiatives and in the longer term, through the development of new accommodation facilities.

As a result of these survey results the strategies recommended in this document concentrate on building on what is already there and not attempting to building new markets certainly in the short to medium term.

6. SWOT Analysis

Strengths, Weaknesses, Opportunities, Threats. A SWOT Analysis was undertaken by City of Armadale staff and by members of the local tourism industry. The results have been combined and broken into the five 'A' which are accepted as being the essential requirements for a tourism destination.

STRENGTHS		
Attractions	Diverse landscapes	Green environment
	Regional Parks	Culture & Heritage
	Champion Lakes	Araluen Botanic Park
	Armadale Reptile Centre	Hills region dams
	Historic Precinct	Araluen Golf Course
	Orchards	Mundi Bidi/Bibbulman Track
	Wineries	Elizabethan Village
	Local artwork/Galleries	Koala Park
Access	Main Railway line	Highways converge
	Gateway to South west	Close proximity to Perth
	Bus hub	Close to airport
	First point you reach in metro are from down south	
Accommodation	Bed & Breakfasts	
Activities	Events	Australia Day Fireworks
	Sporting events	Kelmscott Show
	Highland Gathering	Art Awards
Amenities	CBD Shopping Centre (7 days)	2 nd hand stores
	CBD facilities	Cinemas
	Regional Medical Centre	Quality restaurants
	Facilities for weddings	

WEAKNESSES		
Attractions	No conference facility	Bushland vandalism
	No iconic attraction	Armadale Aquatic Centre
	Lack of quality attractions	Lack of strong identity
Access	Parking for caravans & coaches	Signage – lack of and conflicting
	Anti social reputation of rail line	Parking for Araluen events
	Lack of public transport	No public transport to Araluen
Accommodation	Lack of all types of accommodation	
Activities	Champion lakes reputation for non rowing events	Loss of major events
	Not a lot to do	
Amenities	Toilets	Rest areas
	First impression when coming from train	Graffiti
	Niche/speciality retail	After hours 24/7 supermarket
	Lack of restaurants to accommodate large groups	

Additional identified weaknesses that don't fit into the 5 "A's were:

- Lack of understanding of who is responsible for signage
- Problems with coordination of city infrastructure
- Lack of pride
- Poor online presence
- Lack of awareness by Elected Members of importance of tourism
- Lack of funds for promoting destination
- Communication between industry and City
- Lack of vision & leadership
- Lack of industry body
- Lack of trader profit for 7 day trading

OPPORTUNITIES		
Attractions	Aboriginal interpretive centre at Champion Lakes	Araluen Botanic Park
	Trails development – heritage walks	Aquatic Centre upgrade
	Promotion of park & gardens to new residents	Regional recreation facility
	Orchards – honey - cherries	Self drive trails – maps & accessibility
	Revamp Pioneer village	Bungendore Park
Access	CAT Bus	Linking transport
	Shuttle service from train station	Better access to historic precinct
	Public transport to Araluen	Revamp signage
	Converging road systems tie into cheap (senior, weekend, schools) public transport	Directional signage at train station
	Tourist bus from Perth	
Accommodation	New motel accommodation	Major 5 star resort
Activities	Champion Lakes – annual event opportunity	Golden spokes cycling event
	Highland gathering	Art Awards
	Attract more events	City wide annual festival
	Roleystone theatre packages	
Amenities	7 day trading	Visitor Centre kiosk in Mall
	Information portal for visitors from south	Armadale Tourism Precinct
	Redevelopment of drainage system	Upgrade website
	Icon to represent Armadale	Attract unique shops
	Redevelop Jull Street (Mall west end)	Use of amphitheatre in CBD
	Street entertainment	

Additional identified opportunities that don't fit into the 5 "A's were:

- Population increase
- Target family visitors
- More resources for marketing
- Improve links to Armadale Business association
- Develop community portal
- Changing demographic
- Change of image (rebranding) Southern gateway / Eastern Foothills
- Educate and lobby Elected Members
- City of Armadale to employ Tourism Industry Development officer

THREATS		
Attractions	Competition from other suburbs	Loss of identity
	Strong marketing by other Shires	
Access	Transport – lack of connection	Cost of travel to Australia/WA/Perth
Accommodation	Lack of accommodation	
Activities		
Amenities	Lack of connection to Armadale community	Adult shop in arcade
	Small town mentality	

Additional identified threats that don't fit into the 5 "A's were:

- Changing demographic
- Economic pressures
- Social problems
- People's resistance to change
- Lack of resources allocated by Local Government
- People's perception

6. Product/Destination Audit

In developing a tourism strategy it is important to first identify the tourism assets that a destination possesses. In the case of the Armadale region there are a wide range of attractions and facilities, albeit that at present there is not one exceptional tourism icon that represents a major visitor drawcard.

In the past the collective presence of the Elizabethan Village, Pioneer Village and Cohunu Koala Park provided an image and marketing focus that underpinned the region's tourism industry.

While each of these attractions continues to operate today, they do so in vastly different market environments and in the case of Pioneer Village, in a substantially reduced capacity. While these attractions will continue to be important, there is an urgent need to refresh the image and marketing focus of the Armadale region.

The Champion Lakes precinct, in the longer term, will be a significant tourism icon, however, at the time of this report is in the very early stages of development and accordingly, will not be a standout factor in tourism for some time.

Certainly Champion Lakes has a great potential in the short term to host major events and therefore attract visitors to the region, however, as a general tourist attraction, will not play a major role until the Aboriginal Enterprise and Interpretive Centre and the Whitewater Park proposals have been completed.

In the meantime, the region does have a wealth of other attractions that collectively can be positioned and marketed to greatly strengthen Armadale's tourism industry from where it is today.

Following is a list of the Armadale region's tourism assets that form part of the tourism strategies developed within this report:

Attractions

- Champion Lakes Precinct
 - Public Swimming Beaches
 - Sports events
 - Canoeing Championships
 - Cycling Time trials

- Rowing Regattas
 - General events
 - School Holiday Art Program
 - Dragon Boat Racing
 - Picnic Areas
 - Aboriginal Enterprise and Interpretive Centre – to be developed
 - Whitewater Park – to be developed
- Araluen Botanic Gardens
- Araluen Golf Course
- Cohunu Koala Park
- Armadale Reptile & Wildlife Centre
- Reinvigorated Retail Town Centre
- Farmer Direct Markets and Fresh Produce Production
 - Armadale Producers Market
 - Borrello Cheese
 - MacNuts WA
 - Mundella Dairy
- Hills Based Activities (Darling Scarp), Bushwalks, Parklands and Picnic Areas
 - Churchman Brook Dam
 - Canning Dam
 - Wungong Dam
 - Historic Quarry Trail
 - Heritage tree Trail
 - Armadale Settler’s Common Trails
 - Bungendore Park Trails
 - Churchman’s Bushlands Trails
 - Armadale Tourist Walk
 - Pioneer Park & Tree Top Walk
 - Munda Bididi Trail
 - Bibbulmun Track access at Sullivan Rock
 - Spring Bushwalks (weekends September to October)
 - Interpretive Bird Guide
 - Cycle rides
- Historic Collections and Heritage Buildings
 - History House Museum
 - Bert Tyler Vintage Machinery Museum
 - Armadale Outpost Telegraph Centre
 - Minnowarra Chapel
 - Elizabethan Village
 - Pioneer Village
 - City of Gosnells Museum – Wilkinson Homestead
 - Schoenstatt Shrine
- Raeburn Orchards
- Armadale Abseiling Tower
- Armadale Aquatic Centre

- The Gemstone Factory
- Specialty Produce/ Food Outlets
 - Genisis in the Hills- Vegetarian Restaurant & Café
- Wineries
 - Rocksgate Winery
 - Millbrook Winery
 - Amarillo Vines
 - Peel Ridge Wines
 - Stakehill Estate
 - Wood Pear organic Wines
- Galleries
 - Waterwheel Gallery
 - Fandangles
- Tour Operations
 - Wilderness Wanderer
- Events
 - Twilight concerts in Minnowarra Park
 - Australia Day Fireworks
 - Arts and Crafts Festival
 - Minnowarra Art Awards
 - Hill Heartbeat Festival
 - Minnowarra Festival
 - Framed Arts Awards
 - Scottish Festival – The Highland Gathering
 - Armadale Cycle Classic
 - Midnight Basketball
 - Roley Pools Planting Activity Day
 - Spring Family Bushwalks
 - Dogs Day Out
 - Carols in Minnowarra
 - Summer Cinema

Accommodation

- Lakeside Country Resort
- Poplar Cottage B&B
- The Hideaway B&B
- The Sahara
- Picture Perfect B&B
- Armadale Cottage B&B
- Discovery Holiday parks
- Charis Hill Cottage
- The Harrison
- Young Australia League (YAL)

- William Shakespeare's B&B
- Hillside Garden Village and Caravan Park
- Heritage Country Motel
- Clarence House
- Kelmscott Caravan Park
- Camp Simons
- Grassroots Holiday Haven

Meeting/Function Facilities

- The Barn at Waterford
- Elizabethan Village

Restaurants/Cafes

- The Manse Restaurant
- Roley's on the Ridge
- Genesis in the Hills
- Cobwebs at the Elizabethan Village
- Han's café
- The Roasted Bean Cafe

From a tourism development point of view the Armadale region has many positive aspects and these need to be drawn on in the short term whilst a broader strategy is being implemented e.g. there is little value in trying to attract overnight stays in the region if the quantity and quality of accommodation is not available.

The research conducted as part of this study clearly shows that current overnight stay visitors are predominately visiting friends and relatives (VFR) who stay at private residences.

This is not a negative as it evidences the strength of the VFR market and the ability of that sector to be further developed through targeted marketing campaigns.

The Armadale region's close proximity to the Perth CBD and wider metropolitan area also means that visitors do not necessarily have to be accommodated in the region and can be day visitors.

From a product/destination audit point of view there is clearly a significant number of attractions/activities to encourage greater visitation to the area. The main issue is the lack of a profile for the many tourism assets that the region has and this issue is covered in more detail in the marketing section of the report.

Be that as it may, there are still a number of initiatives that can be immediately taken to greatly strengthen the Armadale region's tourism sector and therefore the area's economic base.

Attractions

While there are a number of attractions in the region that will, in their own right, be a drawcard for visitors, the current tourism strengths of the region can be summarised as follows:

- An excellent range of parks and picnic areas;
- Great destination for the “weekend drive”
- Lots of galleries, cafes and fresh produce outlets;
- Historic collections and heritage buildings
- Selection of cycling/walking trails;
- The appeal of the Darling Scarp (“The Hills”);
- The dams – Canning, Churchman’s Brook and Serpentine.

The above list is not to under estimate the importance of attractions like Araluen Botanic Park, Araluen Golf Course, Koala Park, Elizabethan Village, Champion Lakes etc. which are a key part of the overall Armadale tourism asset base, but to simply identify what the wider general tourism appeal currently is.

Coupled with the region’s geographic location in respect to transport networks and the close proximity to the major Perth metropolitan area market base, these strengths ideally position Armadale for the day visitor market, not only Perth based, but out- of -State visitors using accommodation outside the region.

There are two major challenges in expanding this market base and they are:

- Creating awareness (marketing);
- Signage.

Creating awareness is covered in another section of this report, however, it is pertinent in this section to make comment about the need for greater packaging of product to make it more attractive and easier for visitors to find and enjoy the many interesting attractions on offer.

In this regard a series of visitors guides based on special interest should be produced in a low cost “tear-off” pad format and as PDF downloads through the Visitor Centre website to cover:

- Picnic areas
- Arts and crafts
- Key attractions – already covered by the current Armadale Tourism Guide
- Restaurants/dining

The current Armadale Tourism Guide does cover a lot of the above, however, specific detailed tourist drives with a comprehensive description of each identified location will provide a greater incentive to come to and move throughout the region.

Coupled with this approach is the need for greatly improved signage.

Signage within the region is, at present, most inadequate and there is a separate need outside of this report for a detailed signage audit to rectify many deficiencies. Key signage issues identified during this study include:

- Armadale Railway Station

This is a key arrival point for many visitors to the region, particularly those who are from out-of-State and who may not have private vehicle transport. There is a need for signage at the station to direct visitors to and through the retail area and particularly to the Visitor Centre.

- Canning Dam

Road signage leading to Canning Dam is sparse with no actual signage on McNess Drive to indicate the entry road to the dam site. The Canning Dam sign on the entrance road is almost completely covered by a hedge and difficult for someone not familiar with the area to see.



- Champion Lakes

There is virtually no road signage leading to Champion Lakes. Signage on Armadale Road/Lake Road and Champion Drive is required to direct visitors to the complex.

- Pioneer Village

There is little indication from the outside that Pioneer Village is in operation, due mainly to the fact that the original prominent main entrance is closed with the now used side entrance not visible from more than three metres away.

These are just some examples of inadequate signage that make it difficult for visitors to find their way around the region and discover the many attractions on offer. It should also be noted that the signage on major roads refers to 'Heritage Country' which is a brand that no longer is promoted in any other way except signage and does not reflect the current product.

The following observations are also made in relation to three of the major attractions:

- Araluen Botanic Park

While this attraction will remain a significant visitor drawcard for the region, a lot has been lost through the major Chilli Festival and the Tulip Festival events no longer being staged. There remains some activity with seasonal tulip growing, however, not at the scale of the previous festival. Parking issues have been the basis for the Chilli Festival to be re-located to Fremantle and the Tulip Festival ceasing to be staged. From a tourism point of view the loss of these two major events is significant as they attracted a large number of visitors as well as generating a greater awareness of the region.

- Champion Lakes

This facility will be a major asset to the region and already has a very high awareness level in the community as evidenced by the telephone survey undertaken as part of this study – 25% awareness within the 400 people surveyed, or 1 in 4. The addition of the Aboriginal Enterprise and Interpretive Centre and the Whitewater Park will further enhance the tourism appeal of this facility. A strong program of events will also create further community awareness of Champion Lakes and these could incorporate a wide variety of activities based not only on the waterway systems, but utilising the large land areas e.g. Caravan and Camping Show.

There is, however, a need to develop strategies to ensure that Champion Lakes does not become isolated from the larger Armadale region and that visitors to this facility are aware of, and are encouraged to visit, the many other attractions that are available.

- Araluen Golf Course

A picturesque hills golf course that offers appeal to the special interest golfing market segment. A proposal to add short term accommodation to the complex will strengthen the ability of the course to attract more visitors. Similarly packaging the golf course with other metropolitan golf courses should add to the visitor appeal, particularly for out-of-State visitors

Attraction assessment sheets have been completed for key attractions. These sheets are designed to give an indication to how the attractions fare against key criteria.

ATTRACTION : Champion Lakes

- 1 Road Access:
- 2 Closeness to Accommodation:
- 3 Signposting:
- 4 Unique Selling Feature:
- 5 Interpretive Material:
- 6 Current Appeal:
- 7 Potential Appeal:
- 8 Management Arrangement:
- 9 Local Support for Tourism:
- 10 Shire exec. Support:

GOOD	AVERAGE	POOR
X		
		X
		X
X		
		X
	X	
X		
X		
	X	
	X	

ATTRACTION : Araluen Botanic Park

- 1 Road Access:
- 2 Closeness to Accommodation:
- 3 Signposting:
- 4 Unique Selling Feature:
- 5 Interpretive Material:
- 6 Current Appeal:
- 7 Potential Appeal:
- 8 Management Arrangement:
- 9 Local Support for Tourism:
- 10 Shire exec. Support:

GOOD	AVERAGE	POOR
		X
		X
		X
X		
X		
X		
X		
	X	
X		
		X

ATTRACTION : Araluen Golf Course

- 1 Road Access:
- 2 Closeness to Accommodation:
- 3 Signposting:
- 4 Unique Selling Feature:
- 5 Interpretive Material:
- 6 Current Appeal:
- 7 Potential Appeal:
- 8 Management Arrangement:
- 9 Local Support for Tourism:
- 10 Shire exec. Support:

GOOD	AVERAGE	POOR
		X
		X
		X
X		
		X
		X
X		
		X
		X
	X	

ATTRACTION : Picnic Areas and Dams

	GOOD	AVERAGE	POOR
1 Road Access:	X		
2 Closeness to Accommodation:		X	
3 Signposting:			X
4 Unique Selling Feature:	X		
5 Interpretive Material:			X
6 Current Appeal:		X	
7 Potential Appeal:	X		
8 Management Arrangement:		X	
9 Local Support for Tourism:			X
10 Shire exec. Support:		X	

ATTRACTION : Historic Collections & Heritage Buildings

	GOOD	AVERAGE	POOR
1 Road Access:	X		
2 Closeness to Accommodation:		X	
3 Signposting:			X
4 Unique Selling Feature:	X		
5 Interpretive Material:	X		
6 Current Appeal:	X		
7 Potential Appeal:	X		
8 Management Arrangement:		X	
9 Local Support for Tourism:		X	
10 Shire exec. Support:		X	

Accommodation

While the Armadale region cannot boast a wide range of short term accommodation at the hotel/motel level, there is a very strong base of bed & breakfast operators. There is scope for these operators to work more closely together in presenting Armadale collectively as a centre for B&B.

The development of hotel/motel style accommodation will to a large degree be market driven, however, the identification of a suitable site or sites by the City will facilitate investor needs and potentially encourage earlier development. Discussions with the investment section of Tourism WA indicate that if a suitable site was identified then market demand will follow.

The City should prepare a tourism plan that incorporates opportunities for future accommodation development.

Access

Armadale is literally at the crossroads of major transport links, placing the region in an ideal position to capitalise on the visitation and economic benefits offered by destination and passing traffic.

Albany Highway, South Western Highway, Armadale Road, Forrest Road and to a lesser degree Brookton Highway and Thomas Road are all major feeder roads that pass through the Armadale region and make the region easily accessible to the broader metropolitan area market.

The challenge is to create the awareness in the Perth market to encourage people to use the road networks for a visit to the region and to also introduce means/incentives that attract traffic passing through, to stop. These are marketing (and signage) issues addressed elsewhere in this report.

The urban rail network also provides a valuable transport link through the Armadale Railway Station, an access option that is presently under-utilised by tourists through lack of public awareness as to the efficiency and benefits of this mode of transport – Transperth provide a family rider fare for up to 2 adults and 5 children for \$8.00 for all day travel. Again, a marketing issue.

Activities

The Armadale region offers a wide range of activities and experiences to the visitor, as listed earlier in this section of the report. Many of these activities are passive and family oriented and strengthen the appeal of the region as a day visitor destination for the Perth market.

The events listed earlier provide an important focus and these add to the range of activities that will attract visitors to the region. There is considerable scope to expand the annual calendar of events, with Champion Lakes being an ideal venue for a range of new activities.

Opportunities also exist to introduce a range of activities in the Jull Street Mall to support the retail sector e.g. buskers, art exhibitions, local gallery displays, children's handy-crafts (particularly during school holiday periods), etc.

Amenities

With the exception of hotel/motel style accommodation, the Armadale region has all of the necessary amenities to meet the requirements of visitors. The main issue is the lack of awareness within the market as to what is on offer to the potential visitor.

With the introduction of extended trading hours for the retail sector, the CBD of Armadale can take on a greater prominence as a tourist destination, however, there are some glaring issues in relation to the presentation of the Jull Street Mall that need to be addressed to attract shoppers from outside the immediate region.

There are a number of buildings/businesses within the mall that are, by their nature of operation, not contributing to the retail "feel" of the precinct. The old post office building and the building occupied by the Armadale Redevelopment Authority are two examples of where the vibrancy of the retail precinct is diminished.

The approach to the mall from the railway station could be greatly enhanced by relocating the taxi rank and therefore removing the clutter of shopping trolleys that are scattered in this area.



The use of the wide mall corridor for regular events/activities would also add to the vibrancy and be a further attraction to encourage visitors to enjoy the Armadale shopping experience.

Pedestrian Malls are a concept which originated in Europe where population levels are such that they create activity and movement within the Mall which is essential to create a vibrant place. Jull Street Mall is typical of an Australian suburban Mall where the number of users is never going to be enough to create a sense of place the majority of the time. It is therefore strongly recommended that consideration is given to reintroducing vehicular traffic through Jull Street Mall.

7. Customer analysis and expectations

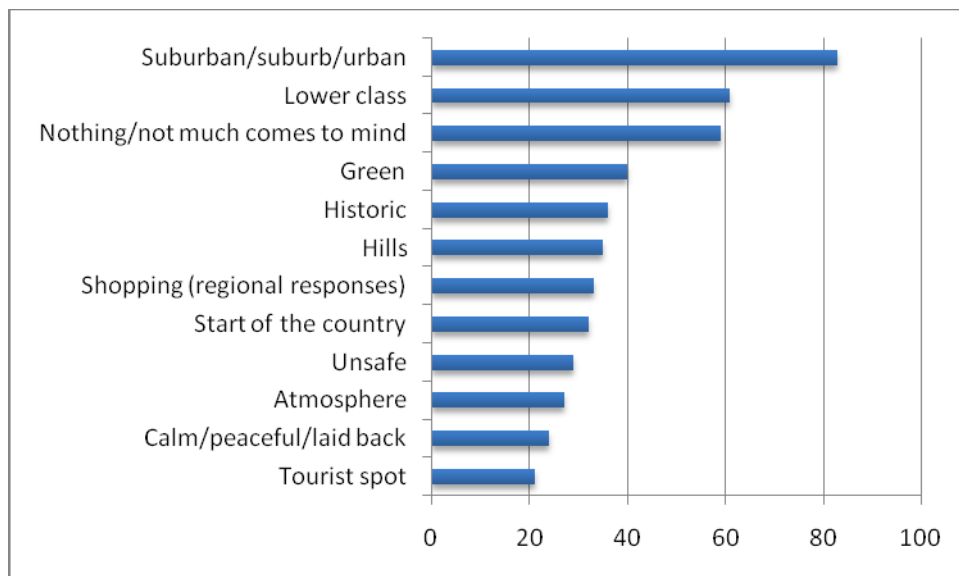
In order to analyse in depth customer expectations Asset Research was engaged to conduct market research among the broader Perth and neighboring communities. The research was to determine preferences for day trips and weekend escapes within the Perth metropolitan area, as well as perceptions of the Armadale area from a tourism perspective.

The results of the survey are given as Appendix A to this report and have been covered in section 4.

8. Perceptions and image

The research has shown that Armadale suffers from preconceived ideas on what to expect when visiting the area with many of these ideas being based on old experiences or influenced by unrelated events. For example there is no doubt that having the railway line referred to as the Armadale line can have negative implications especially when an offence happens at say Victoria Park station it is reported to have happened on the 'Armadale Line' and the place Armadale is what

registers with the listener or viewer. The graph below gives the responses in relation to perceptions of Armadale.



There is no doubt that negative perceptions of a place can be changed over time with a prime example being New York which suffered greatly for many years but with leadership and direction changed perceptions.

The central area of Armadale has changed dramatically in recent years for the better but image can be more about what appears in the media rather than what happens on the ground and therefore one of the recommended strategies is to be proactive in use of the media to promote positive coverage of Armadale.

Armadale is also generally seen in isolation and not a part of the overall "hills" tourism product. Centres like Kalamunda and Mundaring have positioned tourism very much as a hills experience, while Midland and Guildford have been well packaged as part of the Swan Valley experience.

The chart above clearly shows that the perception is more about "urban" than "hills" or "tourism", evidencing a need to re-brand the region for tourism purposes. This re-branding would be strengthened by positioning the region with the wider hills area and being a part of the total "hills" experience rather than just the Armadale sector.

It is also significant that the research did not recognise the dams (Canning, Churchman's Brook and Serpentine) as being associated with Armadale.

Whilst these indifferent or negative perceptions are reflective of the lack of adequate branding or marketing, planning issues or restrictions also play their part in creating the image that Armadale is not a main tourism destination.

The banning of road-side parking for events at Araluen Botanic Park has had a major effect on tourism in the region, both in the sense of a loss in visitor numbers and in the general impression created as to the City's commitment to develop its tourism industry.

Protracted debate on signage issues, particularly relating to the Champion Lakes complex, also creates the impression that Armadale is not serious about tourism development.

Certainly the move to establish the Visitor Centre has produced a positive outcome for tourism in the region, however, this initiative now needs to be supported by planning and development actions, a number of which have been set out in the strategies put forward in this report.

It is recognised that there has been a diminution in Council's planning and development role as a consequence of some of these responsibilities being vested in the Armadale Redevelopment Authority, however, this structure is more likely to influence the longer term strategic planning than the current daily tourism issues that need to be addressed to effect an immediate turn-around in the region's tourism profile.

9. Marketing

(a) Branding

Destination branding has attained greater importance since worldwide travel exploded 20 years ago. It is now the norm for smaller non iconic destinations to attempt to brand their product. Branding is about capturing the essence of the destination and can include:

- History
- Geographical location
- Ease of travelling to the destination
- Interesting tourist sites
- Culture
- Events
- People Infrastructure

In the past the Armadale tourist brand has been 'Heritage Country' which was developed a number of years ago by local industry operators who formed the now defunct Heritage Country Tourist Association. It is questionable that Heritage Country captures what Armadale has become or what it wishes to portray itself as.

The City of Armadale has developed an organisational and place brand to reflect its current thinking and this revolves around the slogan *Armadale Alive*. Other slogans have been used by individuals and organisations and these include:

- So close so unexpected
- Armadale the natural place to grow

The City's corporate *Armadale Alive* brand is not inconsistent with the tourist market although it was primarily developed as an organisational brand. The slogan *Armadale Alive* is a positive and vibrant message and should continue to be used as a primary message but adapted into a tourism context by using a sub message. For example *Armadale Alive* with festivals & events or *Armadale Alive* with trails.

To create a new brand for tourism in Armadale would be expensive and would probably have limited impact in the short to medium term.

(b) Signage

Effective signage is a key component of any successful tourist destination. Signage should be in a visible location, giving concise relevant information which can be used by the visitor in locating or interpreting places of interest. Unfortunately signage in Armadale is of poor quality and of limited value to the visitor. An example is that the brown Heritage Country signage is still in place for directional purposes at many junctions. These signs are about the only place that Heritage Country is still used so will only act to confuse the visitor who has no concept of what Heritage Country is. Directional signage is also located on many occasions in the wrong position when the visitor has actually at the turnoff or is obscured by trees or shrubs.

While there are a number of trails promoted through the Visitor Centre such as the Scenic Drive there is very little in the way of signage either directional or interpretive to direct visitors.

Even Champion Lakes has inadequate signage directing visitors to the entrance although it would be expected that as the facility grows in stature so does the number of directional signs.

Therefore one of the key recommendations is for the City to develop a Signage Strategy as a matter of urgency which can be implemented over a period of time allowing for budget constraints. The signage strategy should be aligned with the *Armadale Alive* brand.



(c) Promotional /product opportunities

The promotion of existing product has improved in recent years through the Visitor Centre and the coordination of input from private operators. Invariably this is a time consuming exercise although well worthwhile. The research reinforces the increasing use of the Internet to access information which is then used to determine day/overnight destination. In this section we list new product which can be used to complement the existing attractions and the promotional opportunities that should be taken advantage of.

There are a number of opportunities which present themselves in the short to medium term.

Product

Investigate the feasibility of operating seasonal tours departing from Armadale train station and linking the station – Araluen – Kelmscott – Champion Lakes.

Develop a series of visitors guides based on special interest which should be produced in a low cost “tear-off” pad format and as PDF downloads through the Visitor Centre website to cover:

- Picnic areas
- Arts and crafts
- Key attractions – already covered by the current Armadale Tourism Guide
- Restaurants/dining

Link the guides to an interactive webpage which should also include a limited number of walk trails.

Develop a series of short break packages aims at specific target markets

Communication/Promotion

Ensure annual advertising in the Experience Perth Holiday Planner (private and public input)

Ensure advertising in the Perth & Fremantle Tour Guide books that are widely distributed at Perth Airport and at accommodation houses and attractions.

Ensure the www.visitarmadale.com.au website is maintained and contains relevant information. Maintenance should include search engine optimisation to ensure maximum exposure.

Introduce Twitter and Facebook on to the Visit Armadale website.

All communication should drive people to the website

Develop an e-newsletter which should be used as a tool for informing stakeholders of up and coming opportunities

Develop a series of editorials aimed at raising the profile locally for use in daily and community press

Gather e-mail addresses and develop a 'what's on' electronic newsletter for general public consumption

(d)Public Relations

In public relations terms the key to success is to make full use of media contacts in gaining positive publicity. Changing negative or ill informed perceptions is twofold. Firstly actions have to be taken to address problems if they do actually exist which may be the physical aspects of the City and to a certain extent much has changed for the better in recent years. The second is to use public relations to improve community spirit and visitor experience which in turn improves overall perceptions.

Success in public relations can be measured in a number of ways over a period of time and go beyond tourism. For example over a five year period success could be measured against the unemployment rate, the level of tourism activity, changes in house prices and expressions of community pride. The key is to undertake regular surveys of particular groups which in time will build up a picture of whether perceptions and attitudes are being changed.

It is also important that a program of familiarisation trips for media and travel personnel be developed and implemented. Local media should also be targeted by countering negative publicity and supplying positive news stories. Specific tourism related articles should be targeted at travel publications. Media kits should be developed and distributed.

10. Organisation, Structure & Industry

In relation to tourism the main focus for the City of Armadale is currently the funding and operation of the Visitor Centre. While the Visitor Centre is a focal point for visitors it is not and never will be the reason for visitors to come to Armadale. The Visitor Centre is there to provide information to visitors as well as ancillary services such as accommodation reservations and ticketing. The current Visitor Centre Manager goes beyond the traditional role of Centre Manager and is involved in many marketing and development aspects of tourism.

The City should reclassify the role of Visitor Centre Manager to be just that, with a position description that reflects the traditional role and create a new tourism development position which involves the coordination of marketing within the area as well as assisting in the development of tourism product by providing advice and assistance to operators. Visitor Centre funding should be for operational expenses while marketing funding should be allocated with the aim being of maximising leverage from the private sector. Funding should be allocated to the maintenance of the www.visitarmadale.com.au website which is an extremely important communications tool.

Under the current structure, responsibility for the Visitor Centre and therefore all things tourism lies with the Executive Director Community Services. While this may be acceptable in the short term the City should look to having tourism sit within an economic development unit in the medium to long term.

For an area to be successful in destination marketing it has to be industry driven. Without the involvement and financial commitment from the tourism operators the City will struggle to gain

and maintain momentum and with limited resources will make little impact. The problem with tourism groups or associations is that they are usually driven by a small number of people and should key people leave then the whole arrangement usually loses momentum and eventually fails. It is also expensive and time consuming to try and establish a new organisation.

The Armadale Regional Business Association (ARBA) was formed following discontent with the previous Chamber of Commerce. While this organisation does not currently have a tourism focus there are a small number of tourist related members. It is recommended that from within its ranks the ARBA form a tourism division which can work with the City on tourism marketing and tourism development related projects.

11. Strategies

The strategies that have been developed address the challenges facing Armadale in becoming a recognised tourism destination within the Perth Metropolitan Region. It is recognised that there are significant image and perception issues to be overcome as a matter of urgency before Armadale is considered by many as a destination of choice.

Accommodation is limited in number and variety and it is not considered that this is a major problem where it is accepted that the day visitor market is predominant. The attraction of new tourist accommodation will be determined by market forces and to a certain extent will be influenced and led by strong economic development and demand from business and commerce for local accommodation.

Strategies

1. Manage and give direction to tourism within an economic development strategy

Tourism is only one of the local economic drivers and in the Armadale context it is never going to be the biggest creator of employment or investment for the local area. The development of this strategy is an important step in reinforcing the City's commitment to tourism but it should be part of an overarching economic development strategy.

The Armadale Redevelopment Authority (ARA) have in recent years taken the lead in tackling many economic development issues and projects and has achieved success including the development of the Champion Lakes facility. However the ARA will cease to exist from 30th June 2011 and while it may be superseded by a new Metropolitan Redevelopment Authority, Armadale would only be part of the responsibility of the new body.

It would therefore seem appropriate that the City of Armadale revisits its role in local economic development through the development of a local Economic Development Strategy. The strategy would obviously incorporate tourism.

Visitor Centres play an important role in disseminating information to visitors and to locals. The majority in Western Australia are either funded entirely or subsidised by the local government who view them as a valuable asset which when operated correctly will encourage longer visitation and benefits to the local economy.

Responsibility for the Armadale Visitor Centre was taken on by the City of Armadale in 2006 from the now defunct Heritage Country Tourism Association. The City now funds the operations of the Visitor Centre including staffing and promotions. The Visitor Centre has grown in status since the appointment of the current manager and of particular relevance is the support from local tourism businesses by becoming members and participating in joint promotional exercises.

The current Visitor Centre manager is involved in many aspects of tourism which are not directly the role of the traditional manager. For example she is President of the Visitor Centre Association and is on the Board of Experience Perth, both roles having positive spin offs for the profile of tourism in Armadale.

Therefore there are a number of questions which arise from the current situation.

- Would the current Visitor Centre Manager be better utilised in a more active tourism development role to improve the quality of the Armadale tourism product.
- Could the current Visitor Centre manager play a more active role in coordination of tourism in Armadale?
- What does the City want to achieve by operating a Visitor Centre and could that be achieved by employing a part time manager.

With the demise of the Heritage Country Tourism Association in 2006 the local tourism businesses lost a vehicle through which to cooperatively further their interests. Over the past four years the number of members of the Visitor Centre has grown substantially with their being a number of benefits to members including the ability to participate in cooperative marketing. However the traditional role of the Visitor Centre is very much about the dissemination of information and not tourism development or packaging. It is also the case that since the Visitor Centre is funded by the local government the membership is limited in its capacity to lobby local government on tourism issues. It is therefore suggested that the relatively new Armadale Regional Business Association (ARBA) be encouraged to form a tourism division which can be the vehicle through which the local tourism industry can raise and pursue relevant issues. Having a tourism subcommittee of a Chamber of Commerce type organisation has worked elsewhere in Western Australia.

With regards to the management and coordination of tourism activities within the City of Armadale it is considered that the duties involved would be included in the role of Economic Development Officer should that role be developed. It is not considered that tourism is of such importance to Armadale that a full time Tourism Officer position could be created. Should the City not recruit an Economic Development Officer then it would be appropriate for some of the manager of the Visitor Centre's time to be devoted to tourism development issues.

In other areas tourism initiatives have been funded through a differential or special area rate however the introduction of an additional rate, at this stage, is not considered to be a viable option. Due to the relatively small size of the tourism sector funding for tourism initiatives will be required to be funded out of general revenue however there may be scope to investigate introducing a differential or special area rate as part of the economic development strategy development.

2. Work with others to cooperatively develop and promote the Armadale tourism industry.

The City's role is to act as a catalyst and coordinator to develop and promote the Armadale tourism industry. There are a number of key organisation which can be used to maximise coverage of Armadale, these organisations include:

- Tourism Western Australia
- Experience Perth
- Local businesses
- Surrounding local governments (Serpentine Jarrahdale, Kalamunda)

By working in conjunction with others this can maximise exposure and maximise promotional spend while making limited resources stretch further.

3. Maximise visitation by promoting Armadale as the place to shop.

There are two major factors which will influence shopping habits in Armadale in the near future. These are the pending change to Sunday shopping hours which will allow all shops to open on a Sunday and the realisation that Armadale has changed in recent years and that it now has an attractive range of shops to match other metropolitan regional shopping centres.

The other more long term factor will be the development of the Wungong Urban Water Project which will provide a living environment for an additional 40,000 people and significant retail development including several big box retailers unique to Perth.

Initially the target market will be very localised although it would be expected that the VFR and travellers from down south would also be potential Armadale shoppers.

4. Encourage the local tourism industry to develop packages and target specific markets.

There are specific target groups that use packages due to time or language constraints. There are two particular groups to which the Armadale product or location is particularly suited

These target groups are:

- Singaporean tourists with tours of orchards

- Cruise ship passengers – day trips to include wildlife and rural settings

The Singapore market is particularly strong for Western Australia due to the ease of access and product available. Singaporean tourists are particularly keen to visit orchards and areas of natural beauty of which Armadale has many. The Perth Singaporean market is dominated by a small number of inbound operators who if targeted can direct tours to particular areas.

The number of cruise ship visits to Fremantle has increased dramatically in recent years as has the size of the cruise ships in terms of passengers carried. Typically cruise ships arrive early in the morning and sail at around 6pm giving passengers time for excursions and then overnight at sea. The majority of passengers purchase tours onboard the vessel prior to arriving in port.

The typical tour would leave the vessel at 8am and return around 4 pm which means that there is a limit on distance to be travelled with the Armadale / Jarrahdale region being an idea distance with a number of places to visit.

5. Prepare a revitalisation program for the Armadale Railway Station/CBD precinct.

The Armadale railway station is an important first point of contact for many visitors and the actual railway station has been improved in recent times as part of the Armadale Redevelopment Authorities work. The majority of visitors using the station will then proceed up Jull Street Mall towards the shops. The Mall does not work as a pedestrian mall due to lack of people and activity while the mix of shops does nothing to attract visitors. It is therefore important that consideration should be given to reintroducing vehicular traffic from Commerce Avenue through to Third Road.

It is also important at the same time to address the retail mix in the area and the use of public space.

6. Develop and implement a signage strategy.

Signage in Armadale from a tourism perspective is fragmented and ineffective in being informative and directional. Urgent attention needs to be given to standardising the brand (see strategy 11). Effective signage is crucial to any successful tourism centre and should be interpretive or directional or a combination of both.

7. Support Champion Lakes to attract national and international events which will raise the profile of Armadale.

Champion Lakes is a world class facility and while it currently comes under the control of the Armadale Redevelopment Authority it will at some point probably be transferred to the control of Venues West. The City should encourage and support bids by the operator to host major events and should use influence with the likes of Eventscorp to actively seek new events.

If the proposed white water facility is built at Champion Lakes this will be a major attractor to the area as the proposal is not just about attracting elite athletes but would be for use by the general public. This is the type of adventure tourism that would have a significant impact on visitors to the Armadale region.

The key for the City of Armadale is to attract people from the events at Champion Lakes to visit the wider Armadale region.

In the longer term the attraction of short term accommodation to Champion Lakes will be crucial to attracting major events and retaining spend within the Armadale region. Ideally the accommodation will have conference facilities which will attract the business market during the week.

8. Build a suite of year round events to attract visitors.

The City currently supports a range of cultural events throughout the year which includes the Highland Gathering, Carols in Minnowarra, Australia Day Fireworks and the Minnowarra Festival. In addition a number of events are organised by external organisations.

Unfortunately in the past year Araluen Botanic Park has ceased to run the Chilli and Tulip festivals due to concerns re parking and access. The operators should be encouraged to identify additional events which can be appropriately held at the park.

Research has shown that events are an effective way of raising the profile of an area and attracting day and overnight visits. While much work has been undertaken by the City's Community Development unit in ensuring that current events meet the Council's objectives there is scope to promote Armadale as the main location for events in the southern metropolitan region through the development of an events calendar.

9. Develop a tourism brand for Armadale building on the City's corporate brand.

As outlined previously, branding is an important aspect of destination marketing, however to develop a brand from nothing can be an expensive and lengthy process. The City of Armadale has a brand which has been developed primarily for the organisation but can be adapted to encompass tourism.

10. Position Armadale as the first stop in the Metropolitan region for travellers from the south.

Armadale is in a unique position in that it is the first point of contact for travellers coming up the South West Highway, Albany Highway and to a lesser extent the Brookton Highway. Therefore it is ideally placed to attract not only tourists but residents of southern towns who may not wish to venture all the way into the metropolitan area for shopping etc. Many of these people will come to the metropolitan area on a regular basis and but will not have stopped at Armadale and are unaware of the changes that have occurred over the past few years particularly in relation to shopping in the city centre.

11. Maximise the economic impact from the Visiting Friends and Relatives market.

The VFR market is identified in all research as currently being the most important market for Armadale and steps should be taken to build this market substantially. The research has shown that over 50% of the people visiting the Visitor Centre come from the suburbs of Armadale Kelmscott and Gosnells and that the suburbs to the south and west also supply a substantial number of visitors. Therefore promotional activities for this target market should be directed at these nearby

suburbs and at the householder since as the host they will be the decision maker on where to take the visitors. Community press offers a good medium to encourage locals to attract the VFR market and to make them aware of what the Armadale region has to offer as a visitor destination.

Appropriate itineraries should be developed which could be used as the cornerstone for this market. These itineraries could be made into tear off maps available through a number of outlets in Armadale and through the visitor centre.

12. Maximise positive media coverage of Armadale.

Armadale needs to be in the news for all the right reasons. Media outlets, particularly those that cover travel, arts and entertainment need to be targeted as they offer regular exposure. Lifestyle articles are both popular and relatively easy to get exposure. Increased media coverage will, over time, lead to an increased awareness of Armadale as a daytrip destination.

Media that should be targeted should include:

Local, state and interstate newspapers with particular sections being:

- Lifestyle
- Food
- Travel
- Sports
- Shopping
- Columnists

Lifestyle and travel magazines

Local broadcasting media

13. Action Plan

The following tables have been broken down into actions relevant to each strategy. It is important to priorities these actions which have been done giving them priorities from A to D which are as follows:

Priority A	Complete by March 2011
Priority B	Complete by September 2011
Priority C	Complete by June 2012
Priority D	Ongoing no completion date

Strategy1 - Manage and give direction to tourism within an economic development framework

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Development of Economic Development Strategy	Develop brief Contract consultant Strategy development Adoption by Council	\$40,000	Adoption by Council	City of Armadale (in conjunction with key stakeholders)	B
Implementation of Economic Development Strategy	Allocate resources Employ staff Implement Strategy over fixed period	Determined by strategy	Individual components will have their own measurements of success	City of Armadale. Other organisations as identified in strategy	D
Conduct review of Visitor Centre	Review Position Descriptions Review services Determine Tourism Officer role	Not Known	Roles determined	City of Armadale	A
Armadale Regional Business Organisation Tourism Division.	Discuss with ARBA the formation of an ARBA Tourism Division and determine the role of that division and relationship with the City of Armadale.	NIL	Establishment of Tourism Division	City of Armadale	A
Develop an e-newsletter which should be used as a tool for communicating with stakeholders and promoting joint opportunities.	This newsletter should be produced at least bi-monthly and should act as a catalyst for industry initiatives	Staff time	Stakeholder involvement	City of Armadale	B

Strategy 2 - Work with others to cooperatively develop and promote the Armadale tourism industry.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Development of an interactive website for Armadale trails.	A coordinated approach to the promotion of trails to attract additional visitors needs a dedicated website	\$20,000	Number of hits on website	City of Armadale	B
Investigate feasibility of forming a 'Hills' tourism group of Councils and businesses	Armadale the start of the hills experience could be used to position the 'hills' as a destination.	Not Known	Formation of group	City of Armadale Shire of Kalamunda Shire of Mundaring Shire of Serpentine Jarrahdale	A
Establish an Armadale tourism industry body	An industry group will establish greater co-operation and an expanded budget for tourism marketing	Determined by strategy Will facilitate co-operative marketing campaigns that will attract industry funding and extend the marketing reach	Extent of industry funding level	City of Armadale	A
Invite the Tourism WA Board of Commissioners to hold a Commission Meeting in Armadale	Bringing the Commissioners and senior executives to Armadale will provide important exposure of the many tourism experiences on offer in the region. A regional tour would be part of the itinerary	The provision of a meeting room, plus hosting lunch and/or cocktails, plus coach hire for the tour. \$1,000	Acceptance of invitation	City of Armadale	B

Strategy 3 - Maximise visitation by promoting Armadale as the place to shop

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Develop a promotional campaign in conjunction with retailers	Form steering group to drive development of a campaign aimed specifically at increasing retail spend. This could be focused on a particular event such as Christmas or Valentines Day.	Should be cost neutral	Feedback from retailers on increased spend.	City of Armadale possibly in conjunction with ARBA	A
Develop a shopping in Armadale guide aimed at residents.	Should have a listing of Armadale's retail stores Should reflect Armadale's branding Could include special offers which could offset cost Gather e-mail addresses	Staff time Cost neutral	Distribution of brochure Feedback from retailers on people using special offers	City of Armadale Retailers ARBA	B
Develop an entertainment program to support the retail precinct	Arrange a program of buskers, exhibitions (local artists), local product stalls and theme events to be conducted in the Jull Street mall.	Should be cost neutral	Feedback from retailers on increased spend.	City of Armadale possibly in conjunction with ARBA	B

Strategy 4 - Encourage the local tourism industry to develop packages and target specific markets.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Develop a package aimed at the cruise ship market	Develop specific one day package designed to start in Fremantle at 8.30 am and return to Fremantle at 4pm	Staff time	Packages available on cruise ships and purchased by passengers	City of Armadale in conjunction with inbound tour operator	B
Develop an orchards tour package	Package aimed specifically at Asian market	Staff time	Package available and purchased.	City of Armadale in conjunction with inbound tour operator	B
Investigate joint promotional opportunities with the Serpentine/Jarrahdale Visitor Centre	SJ VC encouraged to sell Armadale and vice versa. Organise famil for SJ VC staff.	Staff time	Cooperation happening	Armadale Visitor Centre/ SJ Visitor Centre	C
Develop event and stay packages	In conjunction with the B&Bs develop packages which make it easy for people to attend an Armadale event and stay the night. This could include transport between event and accommodation	Staff time	Number of visitors staying overnight for events	City of Armadale Bed & Breakfast providers	B
Develop a series of visitors guides based on special interest which should be produced in a low cost "tear-off" pad format and as PDF downloads through the Visitor Centre website.	<p>Guides to include:</p> <ul style="list-style-type: none"> • Picnic areas • Arts and • Key attractions – already covered by the current Armadale Tourist Guide • Restaurants/dining <p>Distribute though retailers and tourist operators.</p>	Maps distributed to outlets throughout Armadale.	Increasing demand for maps from retailers, tourist operators etc.	City of Armadale	B

Strategy 5 - Prepare a revitalisation program for the Armadale Railway Station/CBD precinct

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Conduct a feasibility study on opening up the Jull Street Mall to traffic	Investigate the various aspects involved in opening up Jull Street Mall to vehicular traffic.	Not known	Study completed	City of Armadale in conjunction with Armadale Redevelopment Authority	C
Develop a plan for the more effective use of the Jull Street Mall area	Engage a placemaker to advise on usage of space	\$10,000	Plan developed and ready for implementation	City of Armadale in conjunction with Armadale Redevelopment Authority	B
Determine desired retail mix and develop a plan for achieving that mix	Undertake an audit of current retail usage and determine preferred retail mix.	\$10,000	Adoption of plan	City of Armadale in conjunction with Armadale Redevelopment Authority	B
Provide an information sign at the railway station	To provide information at the railway station that allows visitors to find directions around the retail precinct and through to the visitor centre	\$2,500	Observation of use and by survey of visitors at the visitor centre	City of Armadale Public Transport Authority Armadale Visitor centre	A

Strategy 6 - Develop and implement a signage strategy.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Undertake a signage audit	Using external expertise undertake a signage audit to determine current directional and interpretive signage in the City of Armadale.	\$15,000	Audit completed	City of Armadale	A
Develop a signage strategy	Using the signage audit as a basis develop a strategy and action plan for effective use of signage throughout the region.	\$15,000	Strategy completed	City of Armadale Tourism WA	B
Implement Signage Strategy	Over a predetermined period of time implement the signage strategy	Determined by strategy	Implementation complete	City of Armadale	C

Strategy 7 - Support Champion Lakes to attract national and international events which will raise the profile of Armadale.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Support ARA in its attempts to attract new events to Champion Lakes	Use internal events expertise to identify possible new events which could be held at Champion Lakes and proactively seek to make those events happen	Staff Time	New events held	Armadale Redevelopment Authority	D
Promote the Aboriginal Heritage Centre as an Armadale tourist destination	Work with the operators to raise awareness of the Aboriginal Heritage Centre at Champion Lakes	Not known	Visitor numbers	City of Armadale	D
Support the attraction of short term accommodation to Champion Lakes	Work with ARA and Tourism WA to identify a hotel operator to develop short term accommodation.	Staff time	Development of accommodation	Armadale Redevelopment Authority	C
Support the attraction of the White Water Park to Champion Lakes	Endeavour to encourage the development of the white water facility	Staff time	Establishment of facility	Armadale Redevelopment Authority	C

Strategy 8 - Build a suite of year round events to attract visitors.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Develop an annual events calendar	Annual events calendar should be on City's website, VC website	Staff time	Completion of Calendar	City of Armadale	B
Develop and implement a plan to have entertainment in Jull Street Mall	Create a sense of place by creating activity in an area that currently is unattractive and has no atmosphere	Staff time	Number of activities	City of Armadale	B
Work with Araluen Botanic Park to encourage the staging of appropriate events	Given the parking and safety constraints Araluen should stage appropriate sized events	Nil	Number of successful events	Araluen Botanic Park	D

Strategy 9 - Develop a tourism brand for Armadale building on the City's corporate brand.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Use the Organisational brand ' <i>Armadale Alive</i> ' as a basis for developing a sub brand for tourism use	Engage a graphic design company to develop concepts for using the organisational brand for tourism	\$10,000	New sub brand adopted and utilised	City of Armadale	A
Implement the brand at all opportunities	Include brand in: <ul style="list-style-type: none"> • Website • Media packs • All advertising • All publications 	Not known	Brand recognition increases in surveys	City of Armadale	B

Strategy 10 - Position Armadale as the first stop in the Metropolitan region for travellers from the south.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Develop an advertising campaign aimed at communities on the Brookton Highway, South West Highway and Armadale Highway	Target residents of south and east communities positioning Armadale as the first stop in the metropolitan area. Could have slogan "Armadale why go further". Could include various incentives Gather e-mail addresses	\$20,000	Responses to incentives	City of Armadale	B
Having completed the above action repeat bi-annually if successful	Could vary campaign to build up a picture of what is most effective	\$20,000	Responses to incentives	City of Armadale	D

Strategy 11 - Maximise the economic impact from the Visiting Friends and Relatives market.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Develop a series of visitors guides based on special interest which should be produced in a low cost "tear-off" pad format and as PDF downloads through the Visitor Centre website.	<p>Guides to include:</p> <ul style="list-style-type: none"> • Picnic areas • Arts and • Key attractions – already covered by the current Armadale Tourist Guide • Restaurants/dining <p>Distribute through retailers and tourist operators.</p>	Maps distributed to outlets throughout Armadale.	Increasing demand for maps from retailers, tourist operators etc.	City of Armadale	A
Adopt an annual advertising plan utilising specific publications which target the VFR market.	<p>Advertising to include:</p> <ul style="list-style-type: none"> • Experience Perth Holiday Planner • Perth & Fremantle Guide 	\$6,000	Publication of advert	City of Armadale in conjunction with the industry	B
Undertake an analysis of the social atlas to determine the ethnic mix of local residents born overseas	Identifying the overseas linkages of residents will enable specific campaigns to be developed to attract the VFR Market	Staff time	Response to campaigns	City of Armadale	B
	Maintenance should include search engine optimisation to	Staff time	Hits on website	City of Armadale Visitor Centre	A

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Ensure the www.visitarmadale.com.au website is maintained and contains relevant information.	ensure maximum exposure. Introduce Twitter and Facebook on to the Visit Armadale website. All communication should drive people to the website Website should include a section 'what's happening this week'				
Develop a 'what's on' electronic newsletter for general public consumption	Should be distributed on a regular basis to e-mail addresses that have been gathered using various methods.	Staff time	Number of e-mails addresses Responses to what's on & any special offers.	City of Armadale	B
Develop a 'Restaurant Guide' for Armadale.	Should have a listing and description of Armadale's Restaurants Should reflect the branding Should have offers from restaurants to offset costs	Staff time	Visitation at restaurants	City of Armadale Restaurants	C

Strategy 12 - Maximise positive media coverage of Armadale.

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Working with Tourism WA/Experience Perth to ensure a share of interstate and international media writers planning trips to WA include Armadale in their itineraries.	Develop itineraries prior to visits to maximise product knowledge	Staff time	Number of media visits	City of Armadale	B
Develop a plan targeting specific travel publications with press trips being organised for writers from those travel publications.	Need to determine industry partners and their commitment	Staff time Industry input	Number of visits	City of Armadale	B
Develop a press kit which can be distributed in hard copy and online and have a targeted distribution list for it to be sent to	Kits to include relevant material which will need to be updated on regular basis	Staff time	Number kits distributed	City of Armadale	B
Ensure there is an up to date media section on the Visit Armadale website	Information needs to be kept up to date on a regular basis	Staff time	Number of hits on website	City of Armadale	A
Work with local tourism operators to ensure a regular supply of story ideas are developed and circulated to local and state media	Identify operators and work to extract information.	Staff time	Number of story ideas circulated	City of Armadale	D

Action	Description	Estimated Cost	Measurement of success	Lead organisation	Priority
Give support to local operators to enable them to maximise coverage of their product/service	Offer information sessions for local operators	Staff time	Number of session run	City of Armadale	D
Develop a series of editorials aimed at raising the profile locally	Aim to do these on a regular basis	Staff time	Number of editorials run	City of Armadale	D
Use media monitors or similar agency to track media coverage.	Supply key words which highlight tourist activity ion Armadale	Not known	Number of articles published	City of Armadale.	D

Top five priority actions

1. Conduct review of Visitor Centre
2. Armadale Regional Business Organisation Tourism Division.
3. Development of Economic development strategy
4. Undertake a signage audit
5. Develop a series of visitors guides based on special interest which should be produced in a low cost "tear-off" pad format and as PDF downloads through the Visitor Centre website.

Appendix “A”



Asset Research
—▲—
Information for Success

Report on the City of Armadale Tourism Survey – August 2010

(August 2010)

Prepared by

Asset Research
103 Solomon St
FREMANTLE WA 6160
Phone: (08) 9386 6608
Email: asset_research@optusnet.com.au

Report on the City of Armadale
Tourism Survey - August 2010

TABLE OF CONTENTS

1.0 METHODOLOGY.....	3
2.0 EXECUTIVE SUMMARY.....	4
3.0 RESULTS OF THE SURVEY	
3.1 Tourist Information	
3.1.1 Day Trips	8
3.1.2 Origin of Visitors	11
3.1.3 Information Sources	13
3.2 Perception of Armadale	14
3.3 Likelihood of Trips to Armadale	
3.3.1 Day Trips	16
3.3.2 Weekend Escapes	18
3.3.3 Armadale as a Place to Visit	20
3.4 Visits to Armadale	
3.4.1 Incidence of Visits	21
3.4.2 Most Recent Visit	22
3.5 Awareness/Perception of Armadale Facilities	
3.5.1 Unprompted Awareness	24
3.5.2 Prompted Awareness	25
3.5.3 Desirable facilities/Activities	27
3.6 Shopping in Armadale	
3.6.1 Awareness of Future Shopping Hours	29
3.6.2 Influence of Shopping Habits	30
3.7 Demographics	
3.7.1 Gender	31
3.7.2 Age group	32
3.7.1 Employment Status	33
3.7.2 Type of Work	34
APPENDIX 1 Questionnaire	

1.0 METHODOLOGY

The City of Armadale is currently in the process of developing and implementing a tourism strategy for the Armadale area to ensure the continued development of this important area for the community. In order to effectively develop a strategy it is important to develop an understanding of the key factors influencing customers within this market.

Asset Research was engaged to conduct market research among the broader Perth and neighbouring communities. The research was to determine their preferences for day trips and weekend escapes within the Perth metropolitan area, as well as their perceptions of the Armadale area from a tourism perspective.

Potential respondents were drawn at random from the Electronic White Pages based on a random stratified sampling process.

- 300 completed surveys were sought at random from respondents living in areas within postcodes of 6000 to 6112 and 6145 to 6210. Completed surveys from these areas were classified as from the Perth metropolitan area.
- A further 100 completed surveys were obtained at random from postcodes between 6112 and 6145, or within an approximate 100km radius (east and south) of Armadale (excluding those classified as metropolitan).

Potential respondents were asked to participate in a 10 minute telephone survey comprising a series of demographic and attitudinal questions. A total of 400 completed surveys were obtained from residents in these areas during July and August 2010. The responses have provided a sampling error of +/- 5% at the 95% confidence level for all overall results.

The results quoted in this report are considered to be satisfactory in terms of survey and reporting accuracy and reliability to meet required standards.

The resultant data was collated using Asset's statistical analysis software and used to form the basis of this report.

2.0 EXECUTIVE SUMMARY

This research is designed to determine the preferences of the general community for day trips and weekend escapes within the Perth metropolitan area, as well as their perceptions of the Armadale area from a tourism perspective.

A total of 400 completed surveys were obtained from respondents randomly interviewed by telephone during July and August 2010. 300 of these were from the Perth metropolitan area and a further 100 were obtained from respondents within neighbouring regional areas. The number of responses was sufficient to be able to report on all overall results within a sampling error of +/- 5.0% at the 95% confidence level.

- **Day Trips**

The largest proportion of respondents takes day trips on a monthly basis (22.5%). This was followed by those who take trips bi monthly (16.5%), fortnightly (12.7%), three monthly (12.0%) and six monthly (11.3%). Overall, this order was mostly reproduced when comparing the responses from Perth metropolitan area respondents and regional respondents.

The key issue for respondents is the distance of their residence from the place to be visited. Also of key importance was the interest factor in things to do for those on the day trip as well as things to see. Whilst not as important as the other issues, cost became a factor for many respondents. Also important was the difference of the things to be done/seen compared to the normal routine. Availability of food/drink/refreshments was also of importance.

- **Weekend Escapes**

The majority of respondents take weekend escapes infrequently (54.7%). Despite efforts to obtain a more exact classification for this response most respondents advised that their frequency in undertaking trips was erratic. This was followed by those who never take weekend escapes (18.7%), annually (14.5%), six monthly (9.3%) and three monthly (5.7%). All other responses formed less than 5% of the sample.

The key issue for respondents is cost. Another key issue is the distance of their residence from the place to be visited as well as the need for Perth respondents to feel separated from the Perth metropolitan area. Also of key importance was the interest factor in things to do and things to see. Whilst not as important as the other issues, availability of childcare became a factor for many respondents. Also important was the venue should be child friendly. The length of time needed to get to the area and availability of food/drink/refreshments was also of importance.

- **Information Sources**

The internet represented the key source of information for most respondents (33.3%). In most instances they conducted a Google search of keywords to obtain their results. This was followed by the newspaper (23.3%), specific tourism websites (21.0%) and word of mouth (14.3%) as key information sources. Other information sources were visitor centres (20.9%), local newspapers (11.5%), TV reports (7.7%), TV advertising (2.7%) and radio (2.7%).

- **Perception of Armadale**

The largest group of respondents described Armadale as suburban or urban, followed by those who felt it was lower class. This was followed by respondents who felt that little came to mind when thinking about it.

Descriptors of Armadale were fairly polarised, as were people's opinions. It was often seen as both an urban landscape as well as one that encompassed the hills (green) and other natural and historic features. Whilst it was seen as having shopping it was also seen as the start of the country. While some respondents considered it to be unsafe, many also described it as having atmosphere or being calm/peaceful/laid back.

- **Likelihood of Armadale Day Trip**

A total of 18.5% of respondents indicated that they were 'at least' likely to consider a day trip to Armadale. A larger proportion of regional respondents were likely to consider this compared to metropolitan area respondents.

33.2% of respondents considered themselves to be at most unlikely to consider a day trip. The remaining respondents were either unsure (26.3%) or considered themselves neither likely nor unlikely to do so (21.7%).

- **Likelihood of Armadale Weekend Escape**

A total of 7.5% of respondents indicated that they were 'at least' likely to consider a weekend escape to Armadale. A larger proportion of regional respondents were likely to consider this compared to metropolitan area respondents.

44.3% of respondents considered themselves to be at most unlikely to consider a weekend escape. The remaining respondents were either unsure (24.7%) or considered themselves neither likely nor unlikely to do so (23.5%).

- **Impression as a Place to Visit**

The largest proportion of respondents have a favourable impression of Armadale as a place to visit on a day trip or a weekend escape (43.5%). 22.5% of respondents have an unfavourable impression, with a further 34.0% being unsure of their opinion of Armadale

- **Visits to Armadale**

The largest proportion of respondents has not taken a day trip or weekend escape to Armadale (59.7%). 40.3% of respondents **have taken a day trip or weekend escape to Armadale**.

The largest proportion of respondents last visited Armadale between 1 to 2 years ago (22.4%). This was followed by those who visited 6 months to 1 year ago (19.3%), 3 to 6 months ago (16.8%), 1 to 3 months ago (14.3%) and 5+ years ago (9.9%). 5.6% of respondents visited within the last month.

- **Awareness/perception of Armadale Facilities**

Only 7.5% of respondents advised that they were aware of events or attractions that would encourage them to make a trip to the Armadale area. 79.3% advised that they were unaware and 13.2% were unsure.

Of the 7.5% who were aware of attractions/events (30 respondents), most were aware of Araluen Botanic Park (17 respondents) or the Elizabethan Village (14 respondents). 7 respondents recalled Champion Lakes.

When prompted, the majority of respondents were able to recall Araluen Botanic Park (55.7%). This was followed by those who recalled Champion Lakes (25.0%), the Elizabethan Village (22.3%) and the Wineries of the Hills region (8.3%). While 3.7% of respondents recalled the Armadale Reptile Centre less than 2% of respondents recalled any other facility.

- **Desirable Facilities/Activities**

The largest proportion of respondents would be most encouraged to visit the Armadale area by major events (28.7%). This was followed by shopping promotions (22.3%), accommodation/tours packages (14.8%), wineries packages (11.7%) and organised trips/weekend escapes/day trips (10.7%). 6.8% of respondents would be encouraged by historic walk rails/conducted tours and 5% by bushwalking tours.

- **Shopping in Armadale**

38.3% of respondents advised that they were aware that all shops in Armadale will be able to open on Sundays in the near future. 61.7% advised that they were unaware.

13.8% of respondents advised that the opening on Sundays of all Armadale shops in the near future would affect their shopping habits. 61.7% advised that it would not affect their shopping habits.

- **Demographics**

- 42.5% of all respondents were male compared to 57.5% who were female.
- 21.5% of respondents were between 35 – 44, 20.7% were between 45 – 54 and 18.0% were between 25 – 34. 16.7% were 65+, 14.8% between 55 – 64 and 7.5% between 18 – 24. 0.8% of respondents refused to provide their age.
- 41.7% of respondents were employed full-time, 14.3% were part-time employees and 5.0% employed on a casual basis. 8.3% of respondents were students, 4.3% not employed, and 15.7% were retired. 4.7% of respondents were self-employed.
- Of the respondents who were employed 28.5% advised that they worked in a clerical capacity, 20.5% were employed in a professional capacity and a further 9.9% were managers. 17.1% of respondents were tradespeople, 11.8% were technicians or associated professionals. A further 12.2% advised that they were blue-collar workers.

3.0 RESULTS OF THE SURVEY

This section summarises the results of the survey. The results are presented in broad category headings representing the general topic areas included in the questionnaire.

Demographic results are only mentioned in the body of the report if they demonstrate significant variance across the different groupings.

3.1 Tourist Information

3.1.1 Day Trips

All survey respondents were asked:

“How frequently would you take day trips to areas within and immediately surrounding the Perth metropolitan area?”

Graph 1 shows that the largest proportion of respondents take day trips on a monthly basis (22.5%). This was followed by those who take trips bi monthly (16.5%), fortnightly (12.7%), three monthly (12.0%) and six monthly (11.3%). Overall, this order was mostly reproduced when comparing the responses from Perth metropolitan area respondents and regional respondents.

Graph 1 Frequency of Day Trips

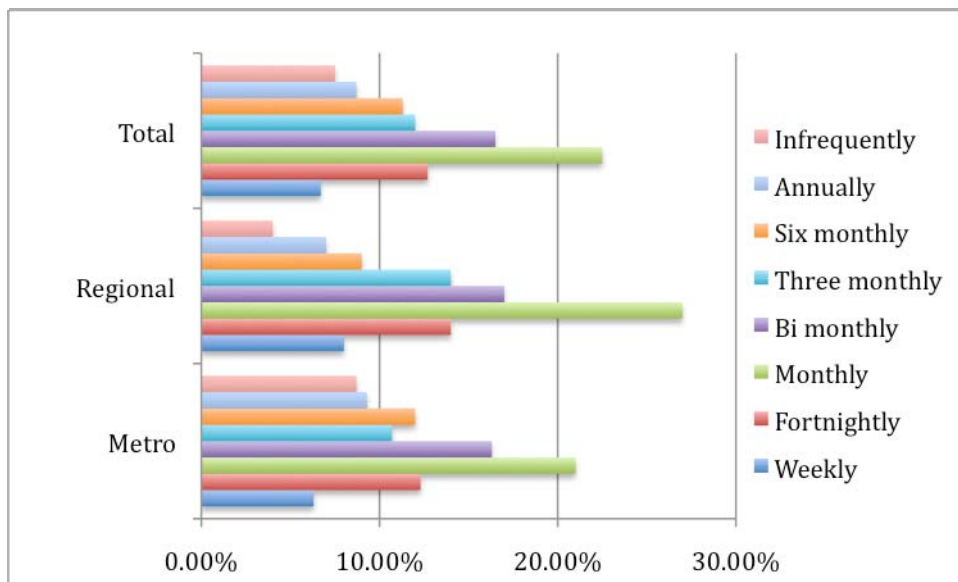


Table 1 (shown overleaf) provides the specific percentages for each response group.

Table 1 Frequency of Day Trips

	Metro	Regional	Total
Weekly	6.3%	8.0%	6.7%
Fortnightly	12.3%	14.0%	12.7%
Monthly	21.0%	27.0%	22.5%
Bi monthly	16.3%	17.0%	16.5%
Three monthly	10.7%	14.0%	12.0%
Six monthly	12.0%	9.0%	11.3%
Annually	9.3%	7.0%	8.7%
Infrequently	8.7%	4.0%	7.5%

All survey respondents were then asked:

“What factors do you look for when planning a day trip?”

This question was asked through the use of an open-ended format eliciting a ‘top of mind’ response. Respondents were not prompted with a list of response options, indicating that the most important responses are listed rather than a complete list. Respondents were able to provide multiple responses if they intended to undertake a range of activities, therefore results will tally to greater than the 400 respondents.

Table 2 shows that the key issue for respondents is the distance of their residence from the place to be visited. Also of key importance was the interest factor in things to do for those on the day trip as well as things to see. Whilst not as important as the other issues, cost became a factor for many respondents. Also important was the difference of the things to be done/seen compared to the normal routine. Availability of food/drink/refreshments was also of importance.

Table 2 Factors Desired for Day Trips

Factor	Response numbers (out of 400)
Distance/proximity	193
Things to do for family/friends, etc.	159
Things to see (sightseeing)	104
Cost	86
Is it different/interest value	61
Availability of food/drink/refreshments	47
Facilities available	39
Atmosphere	37

Factor	Response numbers (out of 400)
Ease of parking	24
Child friendly	23
Support facilities	19
Safety of area	17
Available shopping	16
Weather	14
Public transport access	13
Condition of roads	12
Number of people likely to be there (not too crowded)	12
Access for elderly	11
Proximity to other errands	10
Petrol	10
Other	56

3.1.2 Weekend Escapes

All survey respondents were asked:

“How frequently would you take weekend escapes within WA?”

Graph 2 shows that the majority of respondents take weekend escapes infrequently (54.7%). Despite efforts to obtain a more exact classification for this response most respondents advised that their frequency in undertaking trips was erratic. This was followed by those who never take weekend escapes (18.7%), annually (14.5%), six monthly (9.3%) and three monthly (5.7%). All other responses formed less than 5% of the sample. Overall, this order was mostly reproduced when comparing the responses from Perth metropolitan area respondents and regional respondents, although regional respondents took weekend escapes with greater frequency than Perth metropolitan area respondents.

Graph 2 Frequency of Weekend Escapes

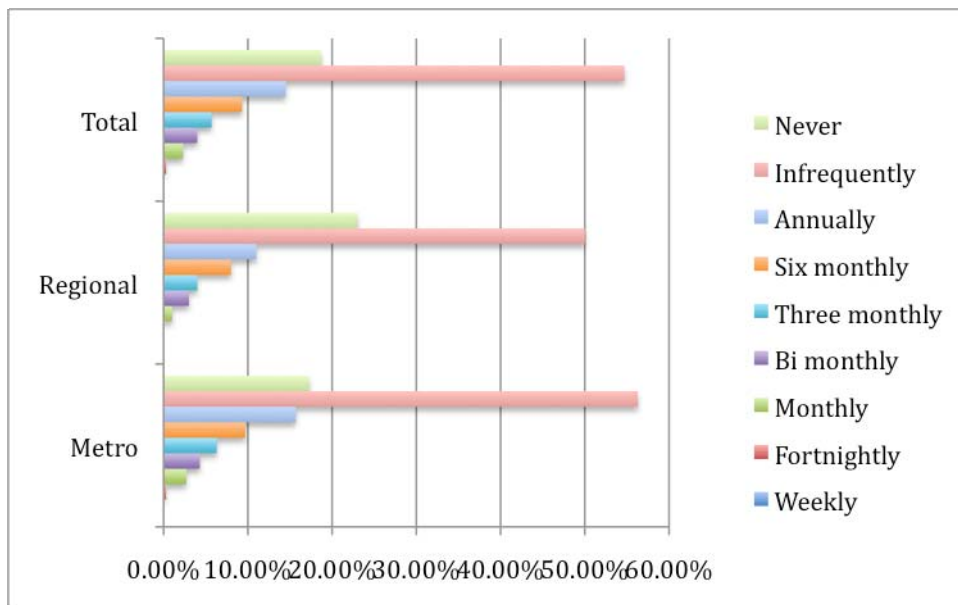


Table 3 provides the specific percentages for each response group.

Table 3 Frequency of Weekend Escapes

	Metro	Regional	Total
Weekly	0.0%	0.0%	0.0%
Fortnightly	0.3%	0.0%	0.3%
Monthly	2.7%	1.0%	2.3%
Bi monthly	4.3%	3.0%	4.0%
Three monthly	6.3%	4.0%	5.7%
Six monthly	9.7%	8.0%	9.3%
Annually	15.7%	11.0%	14.5%
Infrequently	56.3%	50.0%	54.7%
Never	17.3%	23.0%	18.7%

All survey respondents were then asked:

“What factors do you look for when planning a weekend escape?”

This question was asked through the use of an open-ended format eliciting a ‘top of mind’ response. Respondents were not prompted with a list of response options, indicating that the most important responses are listed rather than a complete list. Respondents were able to provide multiple responses if they intended to undertake a range of activities, therefore results will tally to greater than the 400 respondents.

Table 4 shows that the key issue for respondents is cost. Another key issue is the distance of their residence from the place to be visited as well as the need for Perth respondents to feel separated from the Perth metropolitan area. Also of key importance was the interest factor in things to do and things to see. Whilst not as important as the other issues, availability of childcare became a factor for many respondents. Also important was the venue should be child friendly. The length of time needed to get to the area and availability of food/drink/refreshments was also of importance.

Table 4 Factors Desired for Weekend Escapes

Factor	Response numbers (out of 400)
Cost	187
Distance to travel	124
Separation from Perth metro area	93
Things to do/see	71
Availability of child care	65
Child friendly	52
How long it takes to get there	38
Availability of food/restaurants	35
Local activities/facilities	20
Sightseeing available	18
Type of accommodation	17
Atmosphere	14
Child care	13
Calm/peace	11
Weather	11
How busy it is (i.e. long weekends)	10
Number of people around	10
Other	41

3.1.3 Information Sources

All survey respondents were asked:

“Where do you look for information on day trips/weekend escapes?”

The internet represented the key source of information for most respondents (33.3%). In most instances they conducted a Google search of keywords to obtain their results. This was followed by the newspaper (23.3%), specific tourism websites (21.0%) and word of mouth (14.3%) as key information sources. Other information sources were visitor centres (20.9%), local newspapers (11.5%), TV reports (7.7%), TV advertising (2.7%) and radio (2.7%).

Graph 3 Information Sources

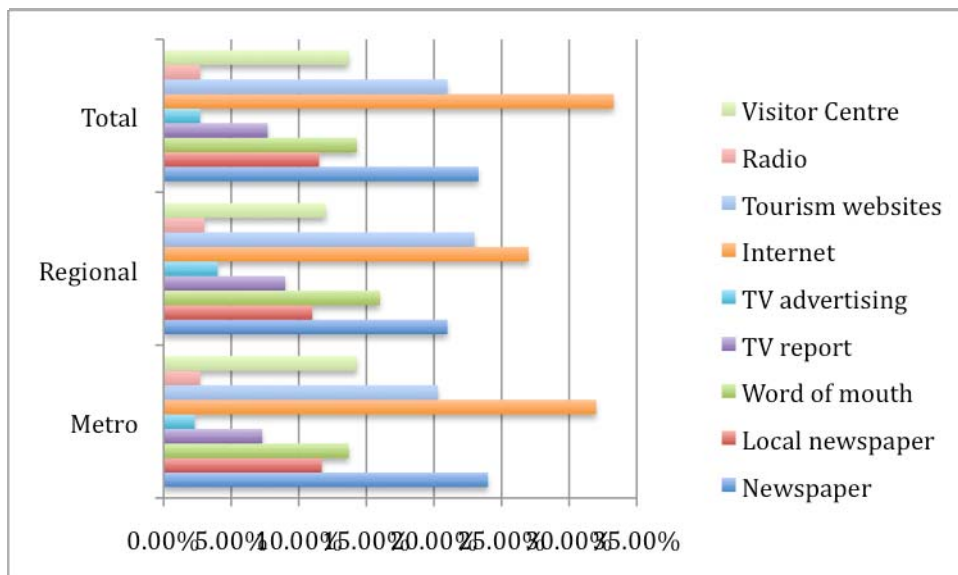


Table 5 provides the specific percentages for each response group.

Table 5 Information Sources

	Metro	Regional	Total
Newspaper	24.0%	21.0%	23.3%
Local newspaper	11.7%	11.0%	11.5%
Word of mouth	13.7%	16.0%	14.3%
TV report	7.3%	9.0%	7.7%
TV advertising	2.3%	4.0%	2.7%
Internet	32.0%	27.0%	33.3%
Tourism websites	20.3%	23.0%	21.0%
Radio	2.7%	3.0%	2.7%
Visitor Centre	14.3%	12.0%	13.7%

3.2 Perception of Armadale

All survey respondents were asked:

“When you think about the area of Armadale what words come to mind?”

This question was asked through the use of an open-ended format eliciting a ‘top of mind’ response. Respondents were not prompted with a list of response options, indicating that the most important responses are listed rather than a complete list. Respondents were able to provide multiple responses if they intended to undertake a range of activities, therefore results will tally to greater than the 400 respondents.

Graph 4 shows that the largest group of respondents described Armadale as suburban or urban, followed by those who felt it was lower class. This was followed by respondents who felt that little came to mind when thinking about it.

Descriptors of Armadale were fairly polarised, as were people’s opinions. It was often seen as both an urban landscape as well as one, which encompassed the hills (green) and other natural and historic features. Whilst it was seen as having shopping it was also seen as the start of the country. While some respondents considered it to be unsafe, many also described it as having atmosphere or being calm/peaceful/laid back.

Many respondents provided descriptors that included each side of the polarised view, recognising that Armadale represented each side to them.

Graph 4 Armadale Descriptors

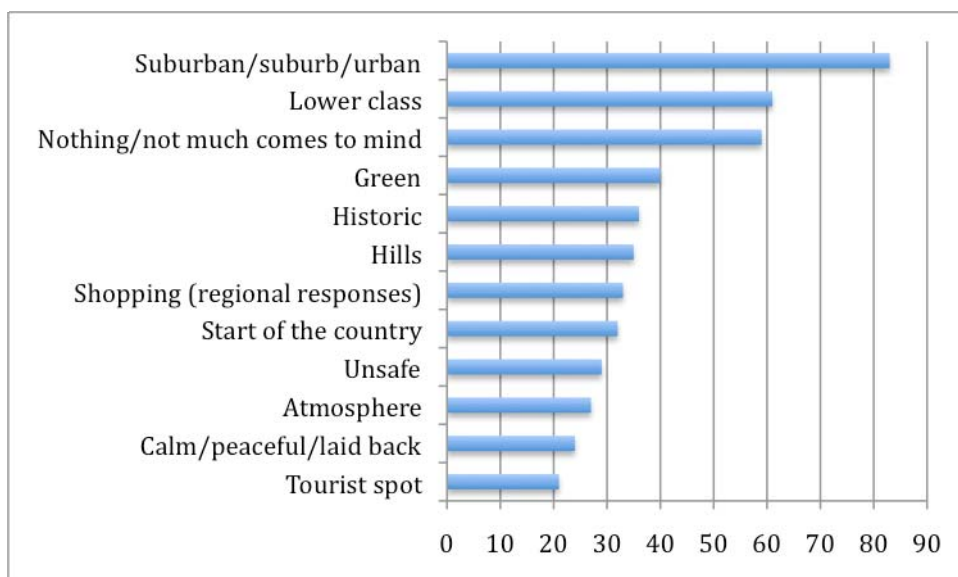


Table 6 provides the specific percentages for each response group.

Table 6 **Armadale Descriptors**

Armadale Descriptors	Response numbers (out of 400)
Suburban/suburb/urban	83
Lower class	61
Nothing/not much comes to mind	59
Green	40
Historic	36
Hills	35
Shopping (regional responses)	33
Start of the country	32
Unsafe	29
Atmosphere	27
Calm/peaceful/laid back	24
Tourist spot	21
Ethnic descriptors (adverse)	17
Village/community	16
Vandalism	15
Semi rural	15
Damp	13
Craft/art	12
Bush	12
Parks	11
Local produce	10
Other	37

3.3 Likelihood of Trips to Armadale

3.3.1 Likelihood of Armadale Day Trip

All survey respondents were asked:

“How likely would you be to consider a day trip to the Armadale area?”

A total of 18.5% of respondents indicated that they were ‘at least’ likely to consider a day trip to Armadale. A larger proportion of regional respondents were likely to consider this compared to metropolitan area respondents.

33.2% of respondents considered themselves to be at most unlikely to consider a day trip. The remaining respondents were either unsure (26.3%) or considered themselves neither likely nor unlikely to do so (21.7%).

Graph 5 Likelihood of Armadale Day Trip

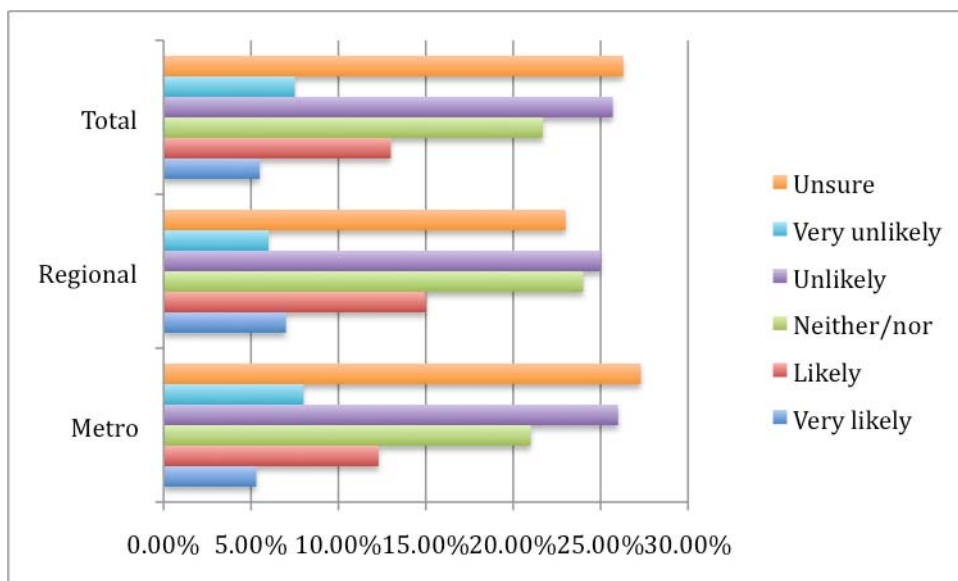


Table 7 provides the specific percentages for each response group.

Table 7 Likelihood of Armadale Day Trip

	Metro	Regional	Total
Very likely	5.3%	7.0%	5.5%
Likely	12.3%	15%	13.0%
Neither/nor	21.0%	24%	21.7%
Unlikely	26.0%	25%	25.7%
Very unlikely	8.0%	6.0%	7.5%
Unsure	27.3%	23.0%	26.3%

Survey respondents who indicated that they were unlikely to consider a day trip to the Armadale area were then asked:

“Why is that?”

This question was asked through the use of an open-ended format eliciting a ‘top of mind’ response. Respondents were not prompted with a list of response options, indicating that the most important responses are listed rather than a complete list. Respondents were able to provide multiple responses if they intended to undertake a range of activities, therefore results will tally to greater than the 133 respondents.

Table 8 Reason for not Going on a Day Trip to Armadale

Reason	Response numbers (out of 133)
Too far to go	28
Not enough time	23
Not enough to see to warrant a visit	18
Unsafe	16
Can do/see similar things closer to home	13
Shopping there the same as elsewhere	12
Would prefer to go further away/too close	10
Too suburban	9
Don't know enough about what there is	7
Other	16

3.3.2 Likelihood of Armadale Weekend Escape

All survey respondents were asked:

“How likely would you be to consider a weekend escape to the Armadale area?”

A total of 7.5% of respondents indicated that they were ‘at least’ likely to consider a weekend escape to Armadale. A larger proportion of regional respondents were likely to consider this compared to metropolitan area respondents.

44.3% of respondents considered themselves to be at most unlikely to consider a weekend escape. The remaining respondents were either unsure (24.7%) or considered themselves neither likely nor unlikely to do so (23.5%).

Graph 6 Likelihood of Armadale Weekend Escape

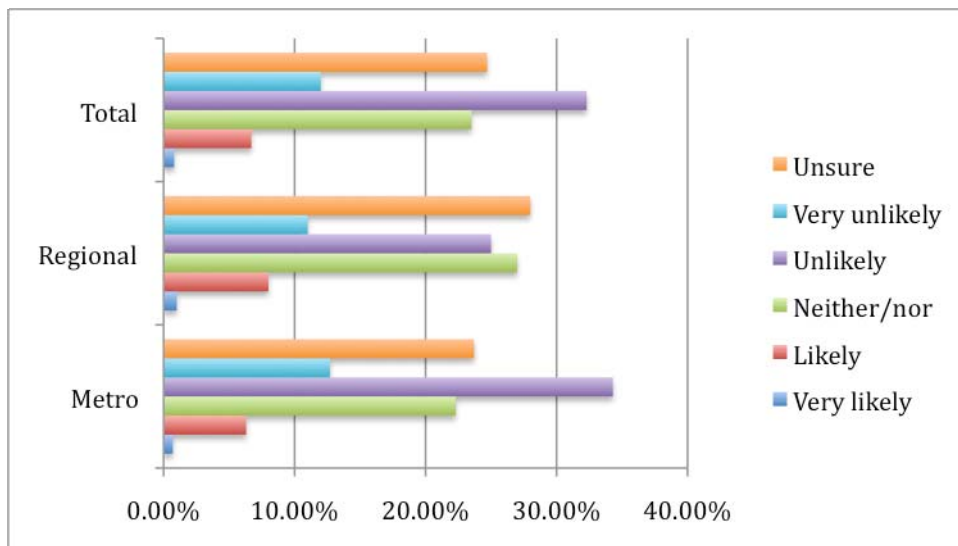


Table 9 provides the specific percentages for each response group.

Table 9 Likelihood of Armadale Weekend Escape

	Metro	Regional	Total
Very likely	0.7%	1.0%	0.8%
Likely	6.3%	8.0%	6.7%
Neither/nor	22.3%	27.0%	23.5%
Unlikely	34.3%	25.0%	32.3%
Very unlikely	12.7%	11.0%	12.0%
Unsure	23.7%	28.0%	24.7%

Survey respondents who indicated that they were unlikely to consider a weekend escape to the Armadale area were then asked:

“Why is that?”

This question was asked through the use of an open-ended format eliciting a ‘top of mind’ response. Respondents were not prompted with a list of response options, indicating that the most important responses are listed rather than a complete list. Respondents were able to provide multiple responses if they intended to undertake a range of activities, therefore results will tally to greater than the 177 respondents.

Table 10 Reason for not Going on a Weekend Escape to Armadale

Reason	Response numbers (out of 177)
Too close to Perth/no separation/too urban	41
Armadale unsafe	27
Too expensive/cannot afford weekend escapes	24
Prefer the beach	21
Not enough to see/do	17
Don't know enough about what is available	14
Cannot arrange for child minding	13
Would prefer to go to country	11
Not enough good restaurants	9
Need good accommodation	8
Other	23

3.3.3 Impression of Armadale as a Place to Visit

All survey respondents were asked:

“Overall, would you say that you have a favourable or unfavourable impression of Armadale as a place to visit on a day trip or weekend escape?”

Graph 7 shows that the largest proportion of respondents have a favourable impression of Armadale as a place to visit on a day trip or a weekend escape (43.5%). 22.5% of respondents have an unfavourable impression, with a further 34.0% being unsure of their opinion of Armadale.

Regional respondents are more likely to have a favourable impression of Armadale than those in the Perth metropolitan area.

Graph 7 Impression of Armadale as a Place to Visit

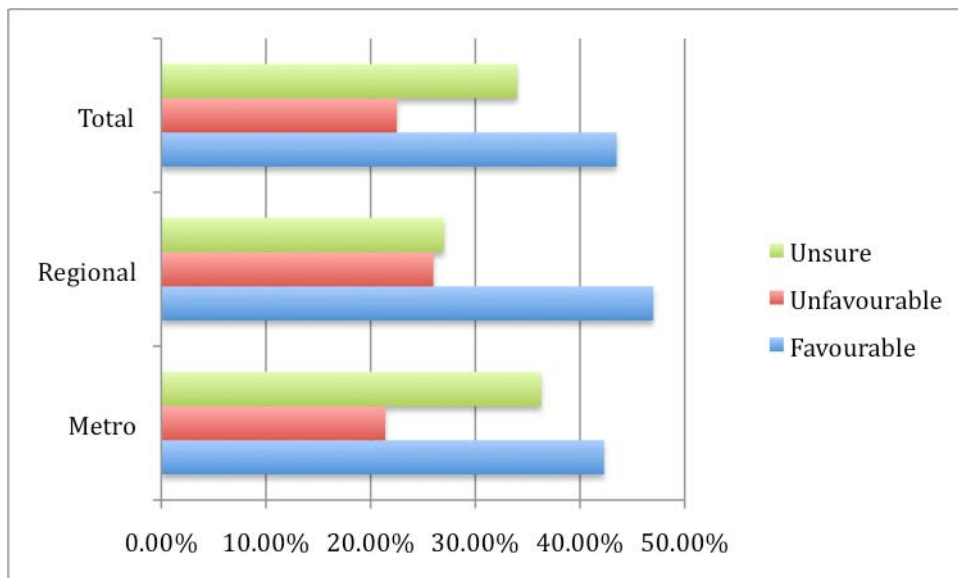


Table 11 provides the specific percentages for each response group.

Table 11 Impression of Armadale as a Place to Visit

	Metro	Regional	Total
Favourable	42.3%	47.0%	43.5%
Unfavourable	21.4%	26.0%	22.5%
Unsure	36.3%	27.0%	34.0%

3.4 Visits to Armadale

3.4.1 Armadale Day Trip/Weekend Escape Incidence

All survey respondents were asked:

“Have you ever taken a day trip/weekend escape to the Armadale area?”

Graph 8 shows that the largest proportion of respondents have not taken a day trip or weekend escape to Armadale (59.7%). 40.3% of respondents **have taken a day trip or weekend escape to Armadale**.

Regional respondents are more likely to have taken a day trip or weekend escape to Armadale than those in the Perth metropolitan area.

Graph 8 Incidence of Armadale Day Trip/Weekend Escape

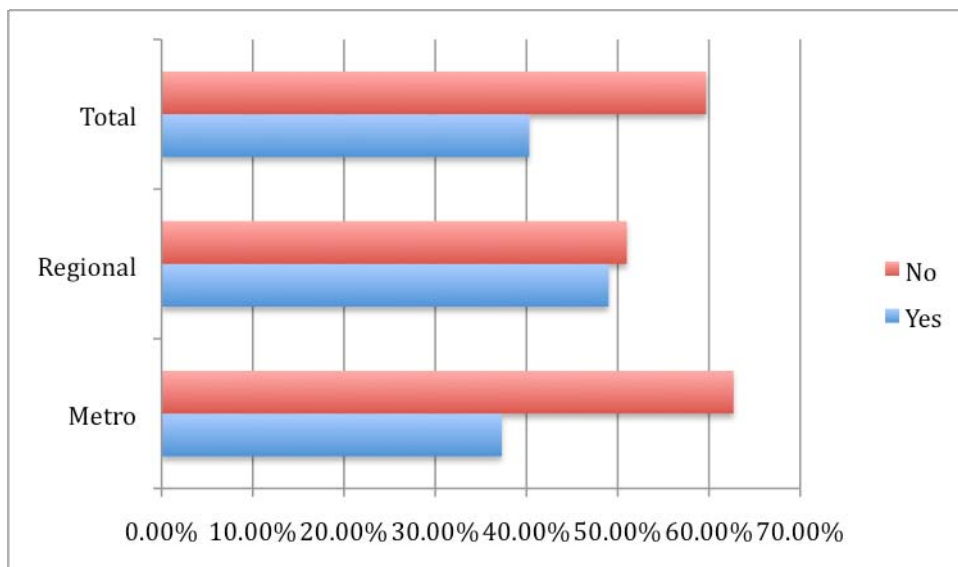


Table 12 provides the specific percentages for each response group.

Table 12 Incidence of Armadale Day Trip/Weekend Escape

	Metro	Regional	Total
Yes	37.3%	49.0%	40.3%
No	62.7%	51.0%	59.7%

3.4.2 Most Recent Visit

All survey respondents were asked:

“When was your last visit to Armadale?”

Graph 9 shows that the largest proportion of respondents last visited Armadale between 1 to 2 years ago (22.4%). This was followed by those who visited 6 months to 1 year ago (19.3%), 3 to 6 months ago (16.8%), 1 to 3 months ago (14.3%) and 5+ years ago (9.9%). 5.6% of respondents visited within the last month.

Regional respondents were far more likely to have visited more recently than respondents from the Perth metropolitan area.

Graph 9 Last Visit to Armadale

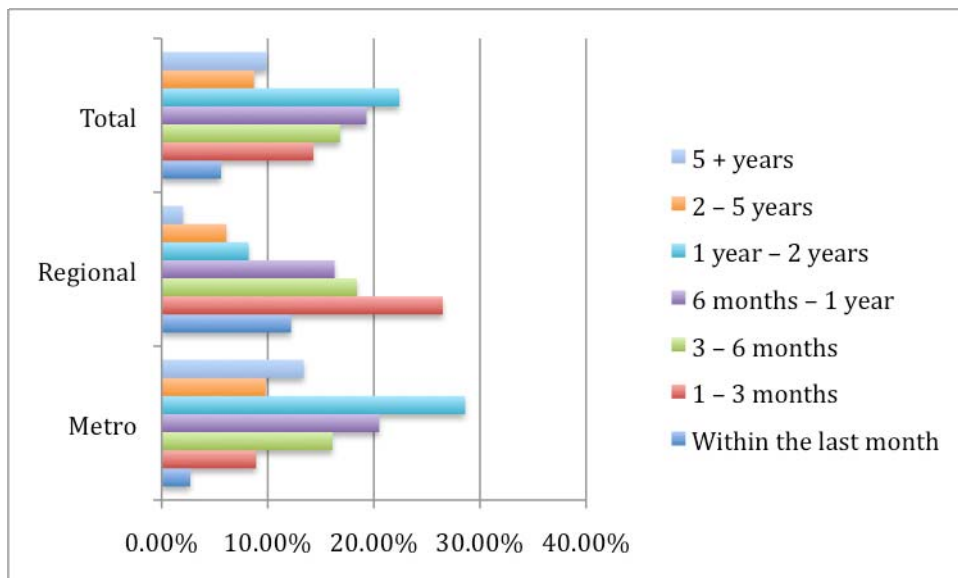


Table 13 provides the specific percentages for each response group.

Table 13 Last Visit to Armadale

	Metro	Regional	Total
Within the last month	2.7%	12.2%	5.6%
1 - 3 months	8.9%	26.5%	14.3%
3 - 6 months	16.1%	18.4%	16.8%
6 months - 1 year	20.5%	16.3%	19.3%
1 year - 2 years	28.6%	8.2%	22.4%
2 - 5 years	9.8%	6.1%	8.7%
5 + years	13.4%	2.0%	9.9%

Survey respondents had been to Armadale were then asked:

“When visiting, what type of group were you a part of?”

Graph 10 shows that the majority of respondents last visited Armadale as part of a family group (50.3%). This was followed by those who visited as a couple (18.0%), as a group of friends (16.8%), by themselves (13.7%) and on a tour (1.2%).

Regional respondents were far more likely to have visited as part of a family group than respondents from the Perth metropolitan area.

Graph 10 **Groups Visiting**

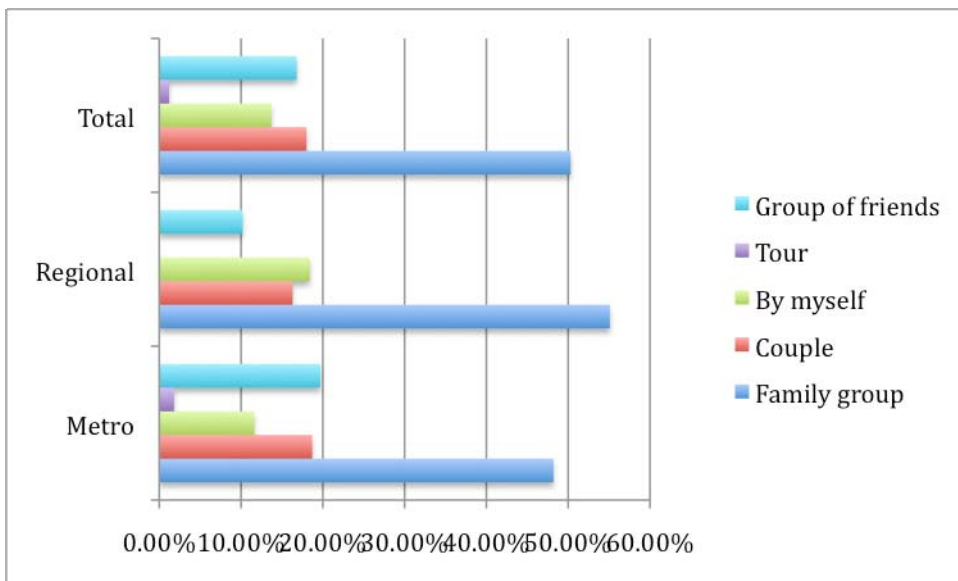


Table 14 provides the specific percentages for each response group.

Table 14 **Groups Visiting**

	Metro	Regional	Total
Family group	48.2%	55.1%	50.3%
Couple	18.7%	16.3%	18.0%
By myself	11.6%	18.4%	13.7%
Tour	1.8%	0.0%	1.2%
Group of friends	19.7%	10.2%	16.8%

3.5 Awareness/Perception of Armadale Facilities

3.5.1 Unprompted Awareness

All survey respondents were asked:

“Are you aware of any events or attractions that would encourage you to make a trip to the Armadale area?”

Only 7.5% of respondents advised that they were aware of events or attractions that would encourage them to make a trip to the Armadale area. 79.3% advised that they were unaware and 13.2% were unsure.

Regional respondents were more likely to be aware of events or attractions than respondents from the Perth metropolitan area.

Graph 11 Unprompted Awareness of Attracting Armadale Facilities/Events

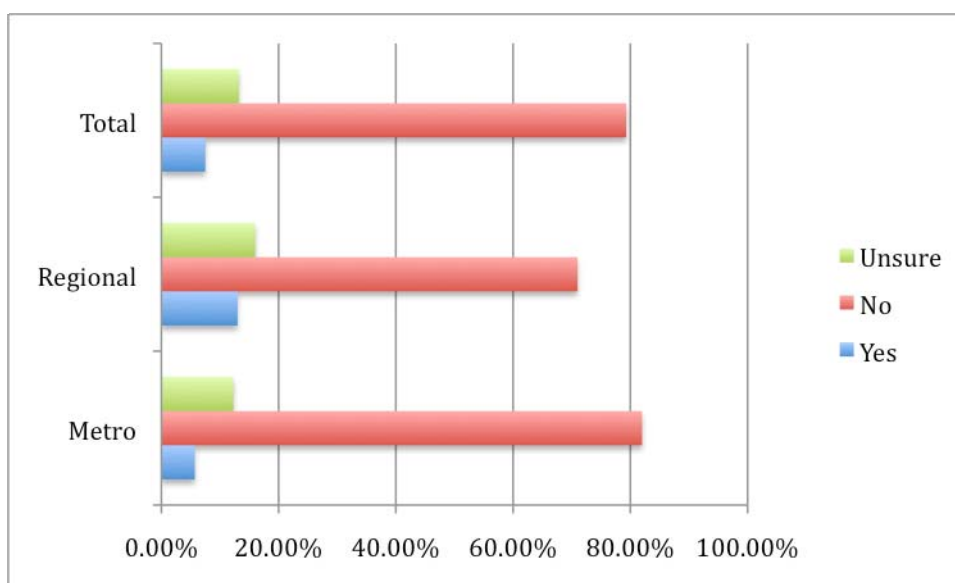


Table 15 Unprompted Awareness of Attracting Armadale Facilities/Events

	Metro	Regional	Total
Yes	5.7%	13.0%	7.5%
No	82.0%	71.0%	79.3%
Unsure	12.3%	16.0%	13.2%

Of the 7.5% who were aware of attractions/events (30 respondents), most were aware of Araluen Botanic Park (17 respondents) or the Elizabethan Village (14 respondents). 7 respondents recalled Champion Lakes.

3.5.2 Prompted Awareness

All survey respondents were asked:

“Have you heard of any of the following?”

Respondents were read out a list of the facilities listed below:

- Araluen Botanic Park
- Elizabethan Village
- Armadale Reptile centre
- Wineries of the Hills Region
- Mundella or Borrello Cheese
- Raeburn Orchards
- Minnowarra Park Historic Precinct
- Champion Lakes

Graph 12 shows that, when prompted, the majority of respondents were able to recall Araluen Botanic Park (55.7%). This was followed by those who recalled Champion Lakes (25.0%), the Elizabethan Village (22.3%) and the Wineries of the Hills region (8.3%). While 3.7% of respondents recalled the Armadale Reptile Centre less than 2% of respondents recalled any other facility.

Regional respondents were far more likely to recall facilities than respondents from the Perth metropolitan area, with the exception of the Elizabethan Village.

Graph 12 – Prompted Awareness of Armadale Facilities

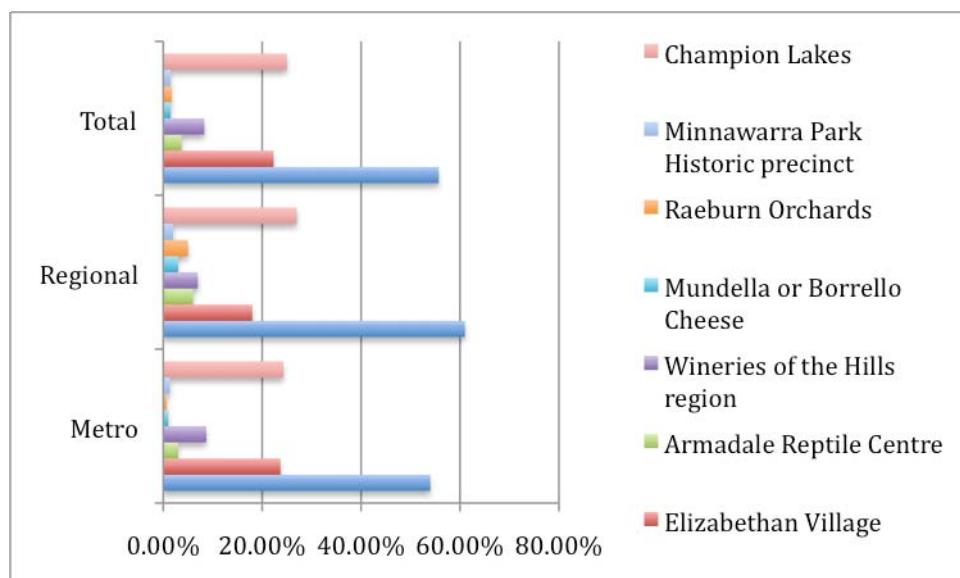


Table 16, shown overleaf) provides the specific percentages for each response group.

Table 16 – Prompted Awareness of Armadale Facilities

	Metro	Regional	Total
Araluen Botanic Park	54.0%	61.0%	55.7%
Elizabethan Village	23.7%	18.0%	22.3%
Armadale Reptile Centre	3.0%	6.0%	3.7%
Wineries of the Hills region	8.7%	7.0%	8.3%
Mundella or Borrello Cheese	1.0%	3.0%	1.5%
Raeburn Orchards	0.7%	5.0%	1.7%
Minnawarra Park Historic precinct	1.3%	2.0%	1.5%
Champion Lakes	24.3%	27.0%	25.0%

3.5.3 Desirable Facilities/Activities

All survey respondents were asked:

“Which of the following facilities or activities would be most likely to encourage you to visit Armadale in the future?”

Respondents were read out a list of the facilities listed below:

- Organised trips/weekend escapes/day trips
- Bushwalking tours
- Winery packages
- Accommodation/tours packages
- Historical walk trails/conducted tours
- Shopping promotions
- Major events

Graph 13 shows that the largest proportion of respondents would be most encouraged to visit the Armadale area by major events (28.7%). This was followed by shopping promotions (22.3%), accommodation/tours packages (14.8%), wineries packages (11.7%) and organised trips/weekend escapes/day trips (10.7%). 6.8% of respondents would be encouraged by historic walk rails/conducted tours and 5% by bushwalking tours.

Graph 13 – Desirable Facilities/Activities

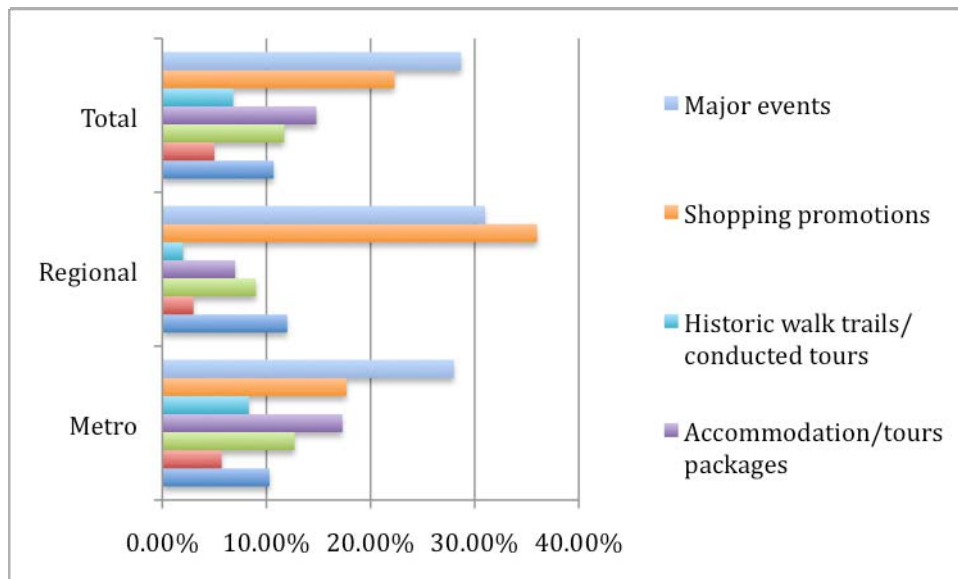


Table 17, shown overleaf, provides the specific percentages for each response group.

Table 17 – Desirable Facilities/Activities

	Metro	Regional	Total
Organised trips/weekend escapes/day trips	10.3%	12.0%	10.7%
Bushwalking tours	5.7%	3.0%	5.0%
Winery packages	12.7%	9.0%	11.7%
Accommodation/tours packages	17.3%	7.0%	14.8%
Historic walk trails/conducted tours	8.3%	2.0%	6.8%
Shopping promotions	17.7%	36.0%	22.3%
Major events	28.0%	31.0%	28.7%

3.6 Shopping in Armadale

3.6.1 Awareness of Future Shopping Hours

All survey respondents were asked:

“Are you aware that all shops in Armadale will be able to open on Sundays in the near future?”

38.3% of respondents advised that they were aware that all shops in Armadale will be able to open on Sundays in the near future. 61.7% advised that they were unaware.

Regional respondents were less likely to be aware of this than respondents from the Perth metropolitan area.

Graph 14 – Awareness of Armadale Shopping

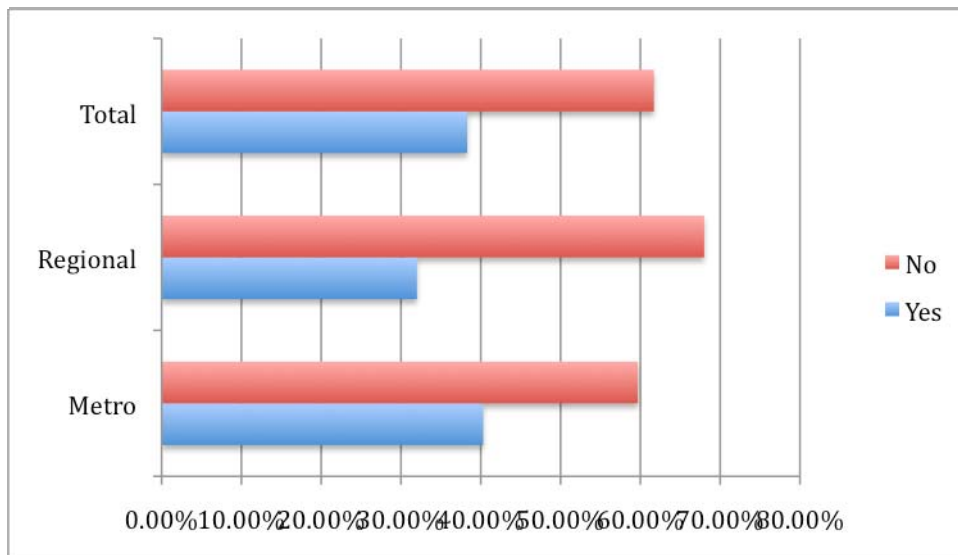


Table 18 provides the specific percentages for each response group.

Table 18 – Awareness of Armadale Shopping

	Metro	Regional	Total
Yes	40.3%	32.0%	38.3%
No	59.7%	68.0%	61.7%

3.6.2 Influence of Shopping Habits

All survey respondents were asked:

“Will this influence your shopping habits?”

13.8% of respondents advised that the opening on Sundays of all Armadale shops in the near future would affect their shopping habits. 61.7% advised that it would not affect their shopping habits.

Regional respondents were more likely to have their shopping habits influenced by this than respondents from the Perth metropolitan area.

Graph 15 – Influence of Shopping Habits

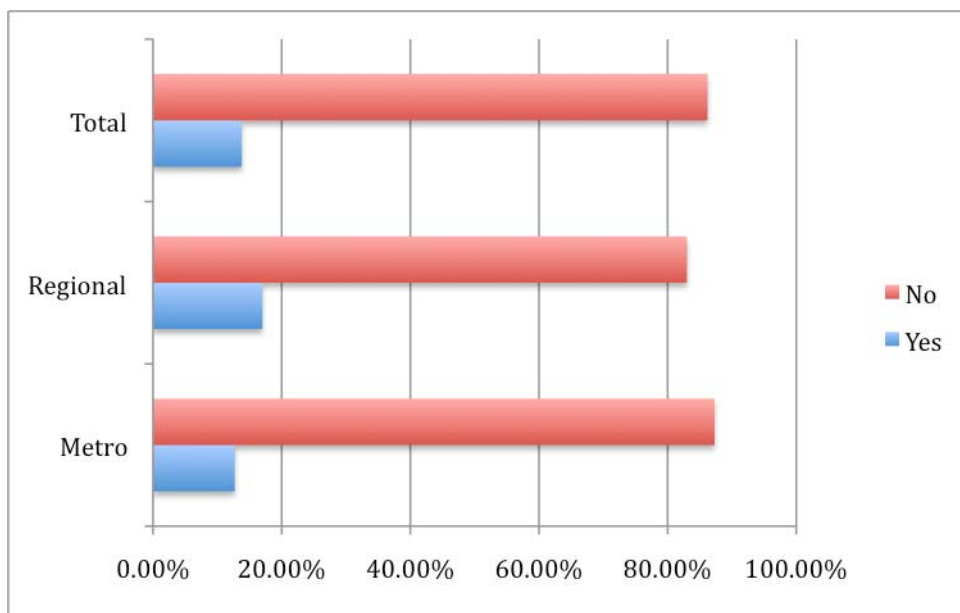


Table 19 provides the specific percentages for each response group.

Table 19 – Influence of Shopping Habits

	Metro	Regional	Total
Yes	12.7%	17.0%	13.8%
No	87.3%	83.0%	86.2%

3.7 Demographics

3.7.1 All respondents were asked to note their gender.

Graph 16 shows 42.5% of all respondents were male compared to 57.5% who were female.

Graph 16 Gender

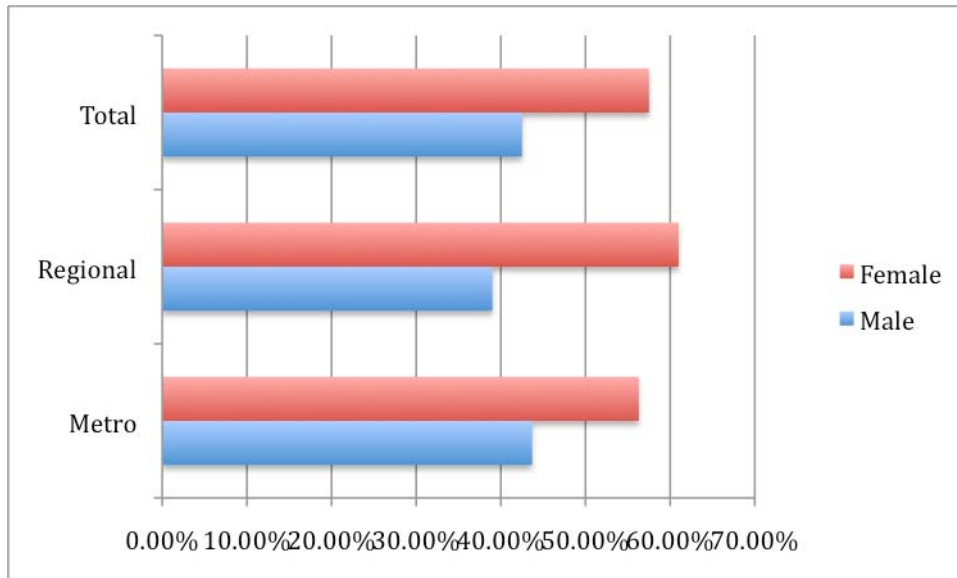


Table 20 provides the specific percentages for each response group.

Table 20 – Gender

	Metro	Regional	Total
Male	43.7%	39.0%	42.5%
Female	56.3%	61.0%	57.5%

3.7.2 All survey respondents were asked:

“What is your age?”

Graph 17 shows age ranges for all respondents were broadly spread, as would be expected from the general population distribution, although with a greater proportion of respondents representing the older age ranges.

21.5% of respondents were between 35 – 44, 20.7% were between 45 – 54 and 18.0% were between 25 – 34. 16.7% were 65+, 14.8% between 55 – 64 and 7.5% between 18 – 24. 0.8% of respondents refused to provide their age.

Graph 17 **Age Group**

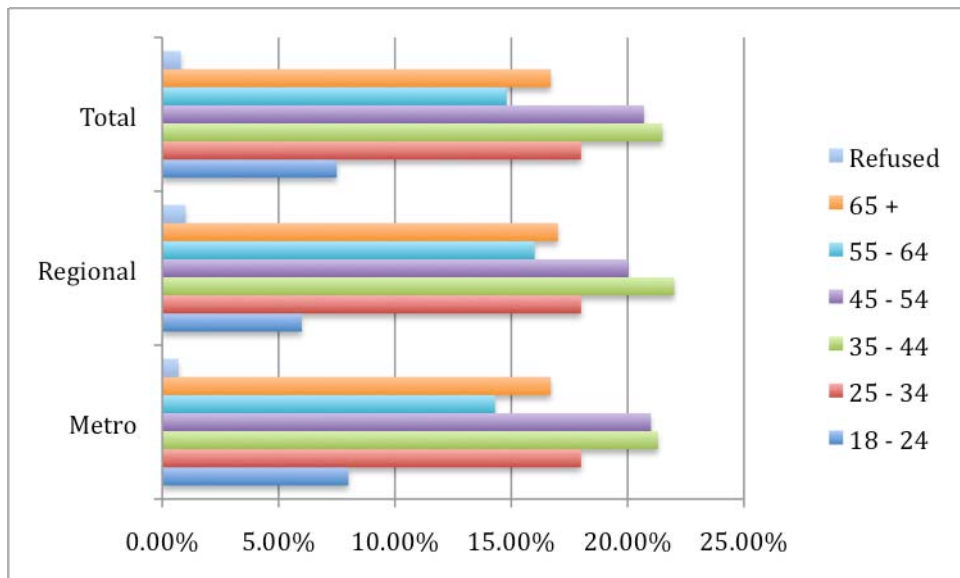


Table 21 provides the specific percentages for each response group.

Table 21 – Age Group

	Metro	Regional	Total
18 - 24	8.0%	6.0%	7.5%
25 - 34	18.0%	18.0%	18.0%
35 - 44	21.3%	22.0%	21.5%
45 - 54	21.0%	20.0%	20.7%
55 - 64	14.3%	16.0%	14.8%
65 +	16.7%	17.0%	16.7%
Refused	0.7%	1.0%	0.8%

3.7.3 All survey respondents were asked:

“Which of the following best describes your current employment status?”

Graph 18 shows that 41.7% of respondents were employed full-time, 14.3% were part-time employees and 5.0% employed on a casual basis. 8.3% of respondents were students, 4.3% not employed, and 15.7% were retired. 4.7% of respondents were self-employed.

Graph 18 Employment Status

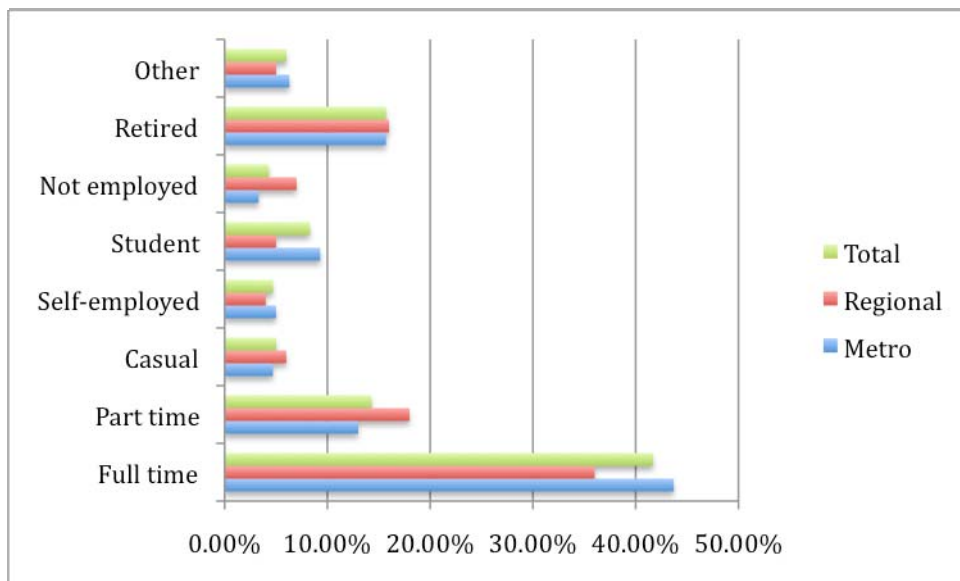


Table 22 provides the specific percentages for each response group.

Table 22 – Employment Status

	Metro	Regional	Total
Full time	43.7%	36.0%	41.7%
Part time	13.0%	18.0%	14.3%
Casual	4.7%	6.0%	5.0%
Self-employed	5.0%	4.0%	4.7%
Student	9.3%	5.0%	8.3%
Not employed	3.3%	7.0%	4.3%
Retired	15.7%	16.0%	15.7%
Other	6.3%	5.0%	6.0%

3.7.4 All survey respondents were asked:

“Which of the following best represents the type of work you do?”

Graph 19 shows that of the respondents who were employed 28.5% advised that they worked in a clerical capacity, 20.5% were employed in a professional capacity and a further 9.9% were managers. 17.1% of respondents were tradespeople, 11.8% were technicians or associated professionals. A further 12.2% advised that they were blue-collar workers.

Graph 19 Type of Work

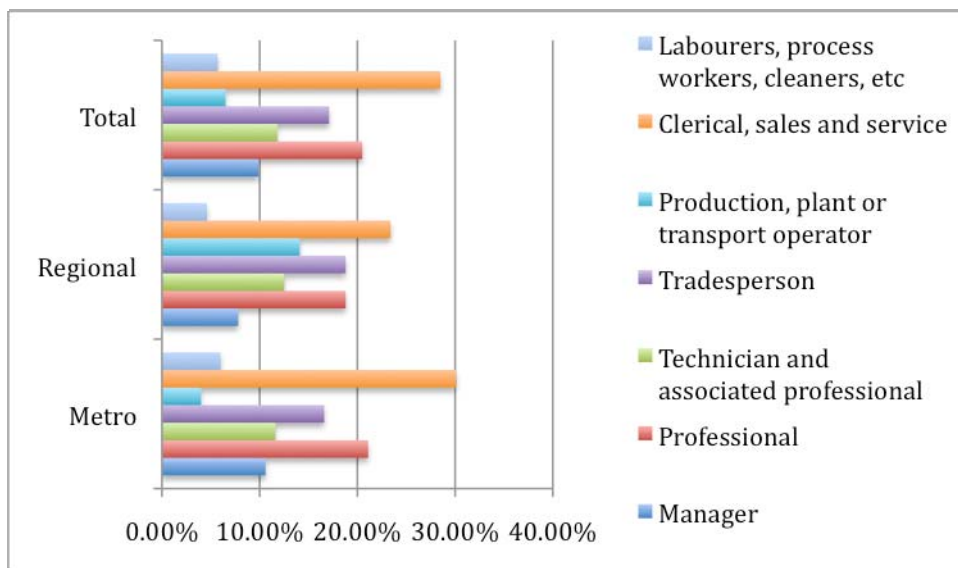


Table 23 provides the specific percentages for each response group.

Table 23 – Type of Work

	Metro	Regional	Total
Manager	10.6%	7.8%	9.9%
Professional	21.1%	18.8%	20.5%
Technician and associated professional	11.6%	12.5%	11.8%
Tradesperson	16.6%	18.8%	17.1%
Production, plant or transport operator	4.0%	14.1%	6.5%
Clerical, sales and service	30.1%	23.4%	28.5%
Labourers, process workers, cleaners, etc	6.0%	4.6%	5.7%

Appendix 1

Questionnaire

Appendix 1. Questionnaire

Date	Time	Interviewer	Respondent's Name	Contact No.	Postcode

**City of Armadale
Tourism Awareness Survey 2010**

Good evening, my name is from Asset Research, a local market research firm. We are conducting a survey on behalf of the City of Armadale to try to determine people's awareness of and attitudes to the Armadale region. The information gathered will be used for future planning.

Any information you provide will remain completely confidential. We will not be releasing any names of those surveyed to the City, so any responses can be made in complete privacy. May I ask...?

(Standard qualifier questions – exclude City of Armadale employees and research/advertising employees)

Question 1. How frequently would you take day trips to areas within and immediately surrounding the Perth metropolitan area?

- Weekly
1
- Fortnightly
2
- Monthly
3
- Bi monthly
4
- Three monthly
5
- Six monthly
6
- Annually
7
- Other (specify) _____
-

Question 2. What factors do you look for when planning a day trip?

Question 3. How frequently would you take weekend escapes within WA?

- Weekly 1
- Fortnightly 2
- Monthly 3
- Bi monthly 4
- Three monthly 5
- Six monthly 6
- Annually 7
- Other (specify) _____

Question 4. What factors do you look for when planning a weekend escape?

Question 5. Where do you look for information on day trips/weekend escapes? (accept multiples – do not prompt)

- Newspaper 1
- Local newspaper 2
- Word of mouth 3
- TV report 4
- TV advertising 5
- Internet 6
- Tourism websites 7
- Radio 8
- Visitor Centre 9
- Other (please specify) _____

If the respondents visit local tourism websites ask 'which ones'?

Question 6. When you think about the area of Armadale what words come to mind? (probe fully)

Question 7. How likely would you be to consider a day trip to the Armadale area?

- Very likely
1
- Likely
2
- Neither/nor
3
- Unlikely
4
- Very unlikely
5
- Unsure
6

(If unlikely) Why is that?

Question 8. How likely would you be to consider a weekend escape to the Armadale area?

- Very likely
1
- Likely
2
- Neither/nor
3
- Unlikely
4
- Very unlikely
5
- Unsure
6

(If unlikely) Why is that?

Question 9. Have you ever taken a day trip/weekend escape to Armadale?

- Yes
1
- No
2

(If yes) Where did you go?

Question 10. When was your last visit to Armadale?

- Within the last month 1
- 1 month to 3 months 2
- 3 months to 6 months 3
- 6 months to 1 year 4
- 1 year to 2 years 5
- 2 years to 5 years 6
- More than 5 years 7
- Never 8 (Go to Q11)

(If they have visited) What was the reason for your visit?

When visiting, did you visit as part of a?

- Family group number: _____ 1
- Couple 2
- By myself 3
- Tour Number: _____ 4
- Group of friends Number: _____ 5
- Other (please specify)

Question 11. Are you aware of any events or attractions that would encourage you to make a trip to the Armadale area?

- Yes 1
- No 2
- Unsure 3

If yes, what are they?

Question 12. Have you heard of any of the following? (please circle as many as apply)

- Araluen Botanic Park 1
- Elizabethan Village

- Armadale Reptile centre 2
- Wineries of the Hills 3
- Region 4
- Mundella or Borrello 5
- Cheese 6
- Raeburn Orchards 7
- Minnowarra Park Historic 8
- Precinct 7
- Champ[ion Lakes 8

Question 13. Which of the following facilities or activities would be most likely to encourage you to visit Armadale in the future? (select one)

- Organised trips/weekend 1
- escapes/day trips 2
- Bushwalking tours 3
- Winery packages 4
- Accommodation/tours packages 5
- Historical walk trails/conducted 6
- tours 6
- Shopping promotions 6
- Major events 6

Question 14a. Are you aware that all shops in Armadale will be able to open on Sundays in the near future?

- Yes 1
- No 2

Question 14b. Will this influence your shopping habits?

- Yes 1
- No 2

(If yes) In what way?

Question 15. Overall, would you say that you have a favourable or unfavourable impression of Armadale as a place to visit on a day trip or weekend escape?

- Favourable 1
- Unfavourable

Appendix “B”

Appendix B

Armadale Visitor Centre Survey

This survey was conducted between 1st July 2010 and 20th August 2010. Visitors to the Armadale Visitor Centre were asked to complete a two page questionnaire and leave it in an entry box at the Visitor Centre. As an incentive to complete the survey one entry will be drawn to win a weekend escape in Armadale. A total of 35 responses were received.

How did you travel to Armadale today?

Car	30
Bus	1
Train	2
Other	2 (walked)

Postcode and place of residence of visitor

	Postcode	No	Suburb
	6054	1	Bassendean
	6104	1	Belmont
	6109	4	Maddington
	6111	8	Kelmsco
	6112	14	Armadale
	6121	1	Oakford
	6122	1	Byford
	6147	1	Lynwood
	6164	1	Cockburn
	6173	1	Secret Harbour

Reason for visit

Rest & relaxation	8
Visit friends & relatives	3
Bringing friends & relatives	7
Picnic	4
Natural attractions/Dams	5
Visiting a tourist attraction	11
Passing through	1
Overseas visitor – recently arrived	1
Ticketmaster	1

How long are you planning to stay in the area ?

Just passing thru	2
A refreshment stop	1
Half a day	5
One day	2
Overnight	
A number of nights	5
Resident	20

Do you plan to visit any of the following destinations ?

Botanic Park	17
One of our Dams	20
Orchards	9
History House Museum	15
Elizabethian Village	18
Vintage Machinery Museum	14
Armadale Repl e Centre	10
The Gemstone Factory	7
Millbrook Winery	10
Cohunu Koala Park	11
History Walk	1

How much do you estimate you will spend during your visit to Armadale?

Less than \$10	4
\$10 - \$50	10
\$50 - \$100	6
Over \$100	8

Gender

Male	9
Female	19
Family Group	7

Age

16 - 24	
25 - 33	5
34 - 42	4
43 - 51	4
52 - 60	9
Over 60	14