

Attachment 2

Dwellingup Futures Roadmap 2021-2036



DWELLINGUP FUTURES ROADMAP **2021-2036** AND BEYOND

SUMMARY DOCUMENT



DWELLINGUP
where trails meet

WILD@HEART



FOREWORDS



The Peel Development Commission was pleased to partner with the Shire of Murray in the development of this document that explores the wealth and liveability of our region and greatly impacts the wealth and liveability of our entire state. Thriving and resilient regional towns mean a more prosperous and liveable state for all West Australians. The Commission acknowledges Dwellingup's traditional custodians, the Binjareb People of the Noongar Nation, and pay our respects to their Elders past, present and future.

Creating thriving regional towns is about diversifying our local economies, growing our local industries, protecting our natural environment and supporting our local communities. Thriving towns require collaboration across industry, community and wise use of our environment to ensure intergenerational benefits are realised. As Dwellingup's local economy experiences a period of change and growth in mining, construction, agriculture, recreation and tourism, Dwellingup Futures provides a road map to successfully plan for and manage this growth for a sustainable future.

Surrounded by forest, Dwellingup's place within the natural environment and connection with nature are what makes it so special. The local community strongly values its small-town charm and lifestyle and sees the natural environment and the town itself as its greatest assets and the primary attraction for residents and visitors alike.

With a history born on the back of forestry and mining, these industries have been integral to shaping what Dwellingup is today and will continue to be in the future. Dwellingup Futures is a plan for achieving self-sufficiency for the town and will help it to grow into the future by supporting varied job opportunities, quality housing and a better range of day-to-day services.

By looking at the way we work, the way we do business, and how we collaborate, we can develop a deeper understanding of what will build our region up. Support for our regional businesses and industries is paramount to our region's resilience — successful industries, jobs for the people of the region, the preservation of our indigenous history, natural environment, and a sense of community, connection, and place. The Dwellingup community welcomes managed and organic growth but is wary of rapid expansion as a tourist town. Hence, recognition of all Dwellingup has to offer and its rapid growth must not undermine its very purpose for being. Accommodating the varied and diverse land uses, industries and community desires mean that striking the right balance is essential.

Extensive stakeholder consultations, land-use reviews, land-use trend analysis, and a future desired state and vision to define the strategic challenges, underpin the Dwellingup Futures Roadmap and describe a vision for Greater Dwellingup's future.

The Roadmap explores how the development and interaction of local industries, tourism, mining and natural resource management can work together to achieve a shared vision with benefits and additional services for the local community. Through collaboration and a genuine commitment to a sustainable future for Dwellingup, we can support this town to truly prosper.

Paddi Creevey OAM, Former Chair
Peel Development Commission



For hundreds of thousands of Western Australians, the town of Dwellingup is a unique place to regularly retreat from the hustle of city living, a place they can enjoy nature inspired adventures surrounded by incredible landscapes, beautiful river trails, and towering forests. It is also home to a small but thriving community, local farms, small businesses and talented artists and artisans who live and draw inspiration from the spectacular and peaceful surroundings.

Since ancient times, the area has been home to the Bindjareb People of the Noongar Nation and is recognised as a sacred, spiritual dreaming place. The origins of the name Dwellingup come from an Aboriginal word meaning "place of nearby water". Over the last century many people have been drawn to the area to support industries such as timber and mining. In 1918 Dwellingup became part of the State Forest and consequently the town became a centre for forest management and research.

During the second world war a POW Internment camp was established at Marrinup partly due to its isolation. In 1961 devastating bushfires wiped out many of the small timber mill towns and settlements leaving just a few key buildings standing. Dwellingup was rebuilt and in recent years a growing economy based on ecotourism, trails, aboriginal cultural tours, heritage rail and hospitality has been established. With such a rich history the Community and Council are now looking forward to building on the existing foundations that will deliver a sustainable future for the town and surrounding region.

While located within the Local Government area of the Shire of Murray the area contains important assets for all Western Australians. Managing the often-overlapping sectors of water, mining, forestry, tourism and accommodation together with providing a safe and secure place to live for around 400 residents and their families, poses significant challenges, risks, and opportunities. Dwellingup Futures seeks to provide a clear set of thoughtful and considered plans and document a collective and shared vision with a clear implementation pathway forward, while carefully considering differing stakeholder views and aspirations.

I would like to thank all those involved over the past two years that have contributed their time, resources and ideas to this important document and encourage all stakeholders to use the information to inform and guide their current and future decision making. Working together we can ensure Dwellingup continues to have a long and prosperous future, a future where all Western Australians will continue to be able to share and benefit from its beauty and natural resources.

David Bolt

President, Shire of Murray



Cover, current image courtesy of Josh Cowling



1. DWELLINGUP FUTURES

Dwellingup Future's Roadmap is a strategic document that describes a vision for Dwellingup's future, and a proposed pathway to achieve the community's aspirations.

Greater Dwellingup¹ is experiencing a period of rapid change. Over the last 25 years it has evolved from a forestry and mining community that was a 'secret spot' for nature lovers, into a highly popular and accessible destination. This evolution has been driven by significant investment, growth, and transformation across Greater Dwellingup's key industries of mining, tourism, recreation, forestry, and natural resource management.

To plan and manage for anticipated change and growth, the Shire of Murray, with the support of the Peel Development Commission (PDC), established the Dwellingup Futures Group. The group's purpose is to support Greater Dwellingup's community and key stakeholders (including Government and industry) to work towards a shared vision where agreed priorities are recognised, understood, and acted upon and differing points of view can be dealt with constructively.

Dwellingup's resident and business community is characterised by a strong sense of identity and a shared passion for maintaining and growing the Town's charm, culture and natural amenity. Consistent across all consultation conducted throughout the Dwellingup Futures Project was a desire for Greater Dwellingup to become a self-sufficient place where people have access to services and families can live.

This will require an increase in a permanent residential population within Greater Dwellingup to drive sufficient demand for key services that were identified as important to the local community. This includes primary school education, childcare, health care and aged-related services.

The Roadmap (Part 1 and Part 2) explores how local population growth, and future changes in industry, tourism, mining and natural resource management will jointly influence the realisation of the community's aspirations, and the additional services required to support a sustainable local community.

“Future growth in Greater Dwellingup will emanate from making the most of our best assets – enhancing our natural resources, sharing our cultural heritage, supporting our people and maintaining our small-town charm.”

Supporting this vision are goals, strategic priorities and key success indicators. These have informed priority actions, and will track the progress of the Roadmap into the future.

¹ Greater Dwellingup is study area for the Roadmap. Further details about the study area can be found in Part 1 of the Roadmap. The area is also described as the “Greater Dwellingup Focus Area” in Map 1 of this document - see page 15.



2. CHALLENGES AND OPPORTUNITIES

The Dwellingup Futures Roadmap responds to a range of challenges and opportunities facing the Dwellingup community.

OPPORTUNITIES AND STRENGTHS

- Dwellingup has been the focus of significant public and private investment in tourism infrastructure, with a specific focus on the trails. Over time, this has the potential to position Dwellingup as an internationally-significant Trails Town with up to 120km of high quality trails and tailored support infrastructure on Perth's doorstep.
- There is an opportunity to grow and diversify the local economy around local and visitor services, including arts, accommodation, food, and beverages. This will bring more diverse jobs for locals and potential future residents, and result in a more resilient economy into the future.
- Dwellingup's location, assets, indigenous and western cultural heritage and history mean that there are potential education, natural resource management and research opportunities that may be attractive to government and private entities. This would help ensure the Town's assets are protected and capitalised on through education, creativity, cultural awareness and scientific approaches.
- Dwellingup's economy and local employment base continues to be underpinned by traditional forest-based industry including bauxite mining and forestry.

CHALLENGES AND THREATS

- Sustaining a resident population that can support local community and social services is a challenge in Dwellingup, where a range of factors including a lack of infrastructure (including education and healthcare), limited housing and accommodation supply, and a lack of local employment can lead to a loss of residents. With the current population, there is a risk that further services and infrastructure may be lost or unable to be attracted to the area. This will further impact how many residents and families can stay or choose to live in Dwellingup permanently.
- An ongoing challenge for the Dwellingup community is a lack of certainty around future mining activities in and around the townsite. In line with the current mining lease (ML1SA), there are currently no areas in Dwellingup that are indefinitely excluded from potential mining activity.
- Bushfire risk and the impacts of climate change pose significant challenges to Dwellingup's homes, businesses, community infrastructure and environment. The management of this risk will be an ongoing concern for the community and economy as the town continues to evolve and develop.



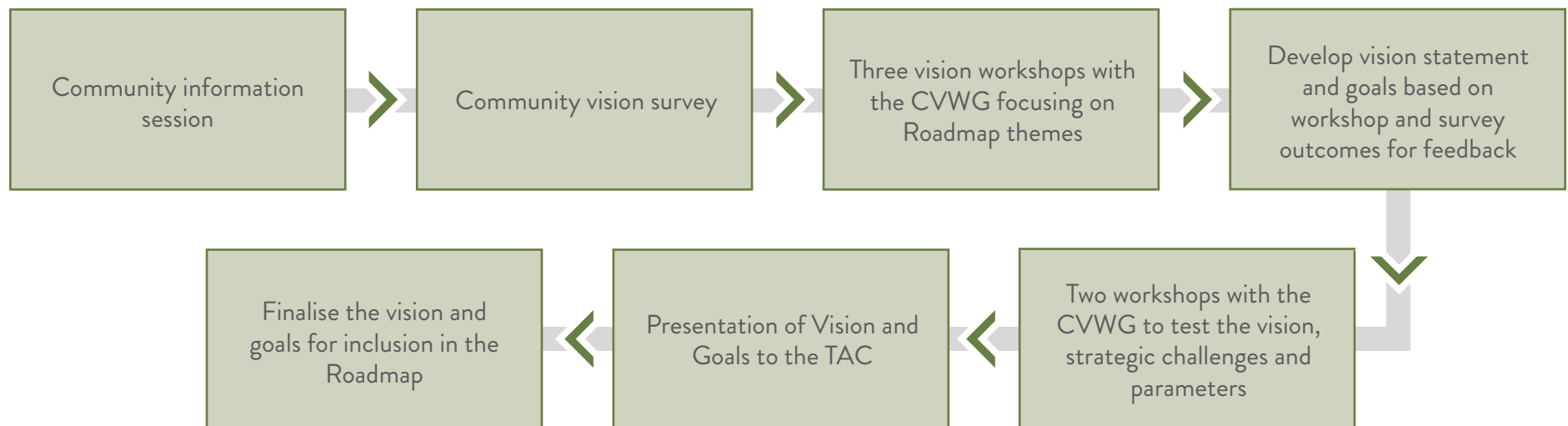
3. A VISION FOR DWELLINGUP'S FUTURE

THE VISIONING PROCESS

A comprehensive engagement program (outlined in figure 1 below) was used to capture the diverse range of perspectives essential in developing a robust vision that genuinely reflected community views. A 12 member Community Visioning Working Group (CVWG) was established to provide inputs into the Roadmap process. The result of this consultation was the vision, goals and strategic priorities outlined on the following pages.

Supporting the Roadmap process has been the Dwellingup Futures Stakeholder Working Group (SWG) and Technical Advisory Committee (TAC). Comprised of Government agencies, local interest groups and Alcoa Australia, the SWG and TAC convened over 12 times since the inception of the project to ensure outcomes reflected that of the community.

Figure 1 - Community visioning process



Further information about the membership of the CVWG, SWG and TAC can be found in Part 1 of the Roadmap.



Photo courtesy of Josh Cowling

VISION

Future growth in Greater Dwellingup will emanate from making the most of our best assets – enhancing our natural resources, sharing our cultural heritage, supporting our people, and maintaining our small-town charm.

GOALS

1. Maintain our small-town charm so Greater Dwellingup will be an attractive and interesting place that is self-sufficient and sustainable in the services it offers families.

2. Grow a diverse and resilient economy, offering more pathways for local jobs and career opportunities.

3. Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities (such as mining, forestry, tourism, agriculture and recreation).

4. Protect and capitalise on Greater Dwellingup's assets through education, creativity, cultural awareness and a scientific approach.

5. Community, Government and Industry cooperatively work together to achieve the objectives of the Dwellingup Futures Roadmap.

STRATEGIC PRIORITIES

Building a case for investment in community-oriented infrastructure that focuses on improving the quality of life of Greater Dwellingup residents.

Ensure small-town charm is retained whilst supporting growth required to deliver education, health, aged care, arts, creative and retail services within Greater Dwellingup.

Realise the capacity to grow population through housing supply, while enhancing and maintaining the charm and unique character of Greater Dwellingup.

Ensure economic activities complement Greater Dwellingup's small-town charm whilst providing local jobs and career opportunities to support population growth.

Proactively plan and manage economic activities that could impact each other (ie. mining, tourism, training, education and the knowledge economy and natural resource management).

Increase availability of land that can accommodate additional mixed-use business type activities.

Ensure local business is equipped to take advantage of and service increased tourism visitation.

Develop a shared understanding of environmental risks and priority assets for protection.

Build a wider recognition of the role the environment plays in Greater Dwellingup's economy, community, and culture.

Where possible, work on a negotiated outcome to proactively manage land-use conflicts.

Build an understanding of the roles natural resources and industry play in supporting the Greater Dwellingup community.

Develop a shared understanding of priority assets for protection and/or utilisation.

Build recognition of the role indigenous and non-indigenous cultural heritage will play in Greater Dwellingup's future.

Build the case for natural resource management, science, and research opportunities to attract interest/investment in infrastructure requirements from government and private entities.

Ensure that infrastructure, resources, training and economic activity are aligned to support natural resources management, science and research opportunities.

Foster a willingness to engage around areas where there is substantial disagreement between stakeholders.

Build the energy and focus required to realise outcomes where there is strong alignment amongst stakeholders.

Develop pathways for collaborative engagement and partnerships to discuss and resolve community issues.

Ensure all voices are heard, valued and able to contribute.

1. Maintain our small-town charm so Greater Dwellingup will be an attractive and interesting place that is self-sufficient and sustainable in the services it offers families.

2. Grow a diverse and resilient economy, offering more pathways for local jobs and career opportunities.

3. Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities (such as mining, forestry, tourism, agriculture and recreation).

4. Protect and capitalise on our assets through education, creativity, cultural awareness and a scientific approach.

5. Community, Government and Industry cooperatively work together to achieve the objectives of the Dwellingup Futures Roadmap.

KEY SUCCESS INDICATORS: BY 2036

1.1 Dwellingup's population has reached 1,306.

1.2 18 additional childcare places have been created for local families.

1.3 There will be sufficient demand for the provision of a primary school for 100 students.

1.4 The development of short stay accommodation infrastructure does not impact upon the supply rental and owner-occupier dwellings for residents.

1.5 Residents have access to a full time GP and remote nursing services.

1.6 Residents can access high quality aged care in Dwellingup.

2.1. There are an additional 130 FTE jobs within the Dwellingup economy (includes the additional 26 FTE in 4.1).

2.2. An additional 133m² of retail floorspace and 1,608m² of commercial floorspace* have been identified and activated through new enterprises.

2.3. Visitors are spending \$31.59m per annum in Dwellingup.

2.4 Indigenous enterprises have been established and supported.

2.5 Dwellingup is recognised as a cultural and arts hub with a minimum of 15 arts-based enterprises making up the Dwellingup Arts Trail.

*Commercial floorspace include Accommodation and Food Services, Arts and Recreation, Education and Training, and Professional, Scientific and Technical Services.

3.1. Support realisation of common objectives through the implementation of the Roadmap Action Plan.

3.2. There is a map that reflects a shared understanding and agreed aspiration put forward by the Dwellingup Community as to natural, heritage and community assets that they believe should be indefinitely protected from industry impacts within the Dwellingup Future Zone.

4.1. Natural resource management and nature-based tourism activities are contributing to the local economy through an additional 26 FTE direct jobs.



5.1. A fit-for-purpose implementation advisory committee, (chaired by the Shire of Murray) is actively consulted and informing decision making around land use for Dwellingup's key industries



4. EXPLORING DWELLINGUP'S FUTURE POTENTIAL

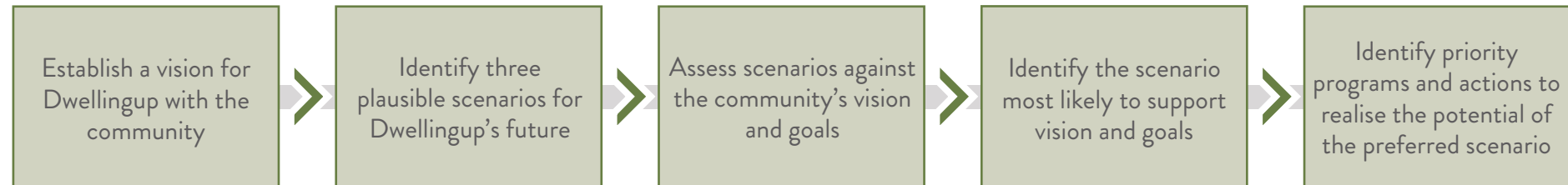
The Dwellingup Future's Roadmap utilised scenarios to explore the implications of a range of plausible futures the community might face, and identify opportunities and challenges that may need to be realised or addressed if the community's ultimate vision is to be supported. The three scenarios, described in table 1, focused on Greater Dwellingup across a 15-year period between 2021 and 2036.

Table 1 – Scenarios assessed against the Dwellingup community's vision and goals.

| | |
|---|---|
|  SCENARIO 1 – BASE CASE | Greater Dwellingup continues to be a small regional town, characterised by limited population growth and an ageing population. It is supported by traditional mining, forestry and a day trip visitor economy with limited expenditure within the Town. |
|  SCENARIO 2 – ADVENTURE TOURISM TOWN | Greater Dwellingup is recognised as an International Trails Town, fuelled by a high visitor growth trajectory and ongoing significant public and private sector investment into this sector. |
|  SCENARIO 3 – DIVERSE ECONOMY | Greater Dwellingup has experienced significant tourism growth, while also focusing on developing arts, education, natural resource management and research industries, leading to a more diverse and resilient local economy that is adaptable to change. |

The process that was utilised to undertake the scenario assessment align with the broader objectives of the Roadmap are outlined in Figure 2.

Figure 2 – Scenario assessment approach



Through analysis and consultation conducted, **Scenario Three (diverse economy)** was judged the most likely to meet the community's vision and objectives:

| | | |
|---|--|---|
|  <p>SCENARIO 3 - DIVERSE ECONOMY</p> | <p>Under Scenario Three (diverse economy):</p> <ul style="list-style-type: none"> • Population growth has enabled the community to attract and retain medical, education and aged-care services, enhancing the long term sustainability of the town. • Investment in agriculture and natural resources management activities and projects are strongly aligned with community vision. • Greater Dwellingup's tourism offer is diverse. It is geared towards nature, education, arts and Indigenous-based tourism experiences. • Sustainable and managed growth allows the community to mitigate the risks of the demand for short stay accommodation overwhelming local housing stocks and eroding community character. • A more diverse food, retail, arts, and hospitality offer has grown and is attracting different visitor segments. • Mining continues to be a key industry, providing significant local employment within Greater Dwellingup (35% of total employment). | <p>Key outcomes:</p> <p>Greater Dwellingup achieves a population sufficient to support additional local services.</p> <p>Moderate and sustainable economic growth and a proactive approach to housing development will support a growing population, while maintaining character, protecting natural assets, and creating jobs and business opportunities.</p> |
|---|--|---|

Scenario assessment also produced the following important key findings:

1. An Implementation Advisory Committee, chaired by the Shire of Murray and with a membership comprising of local community groups, local Traditional Owners, local business representatives, and local industry representatives, is required to foster collaboration, and inform and provide input into future project planning and development, and land use and environmental assessment statutory processes.
2. A clear understanding of the status and interaction of Greater Dwellingup's community, economic and environmental assets is essential for this. Map 1 has been developed in consultation with community, the Dwellingup Futures Technical Advisory Committee and Stakeholder Working Group. It provides an summary of current known existing and planned community and industry activities within Greater Dwellingup.

For further information, Part 1 of the Dwellingup Futures Roadmap contains detailed scenario analysis and key findings.

Map 1 and 2 describe the following two zones that reflect the aspirations of key Dwellingup Futures Stakeholders within Greater Dwellingup:

- Dwellingup Futures Strategic Area; and
- Dwellingup Futures Investigation Area

The Dwellingup Futures Strategic Area encompasses a broad area where the majority of existing and planned community, tourism, agricultural and recreation assets are located, as well as the major entrances to the Dwellingup Townsite. The continued development and enhancement of this area in alignment with the Dwellingup Futures vision and goals is considered essential if the Roadmap's vision is to be realised.

The Dwellingup Futures Investigation Area represents an area where stakeholders have identified opportunities for a range of alternative land uses including natural resource management research, education and ecotourism, as well as resource extraction, forestry and disease risk management. Clarity over the opportunities and challenges represented in this area will require further investigation, with oversight by the proposed Dwellingup Futures Implementation Advisory Committee.

Initiatives that support the enhancement of the Strategic Area, and investigation of the Investigation Areas have been identified within Part 2 - Dwellingup Futures Implementation Plan.

MAP 1: DWELLINGUP FUTURES FOCUS AREA: COMMUNITY, INDUSTRY AND ENVIRONMENT INTERACTIONS

LEGEND

- Dwellingup Futures Focus Area
- Dwellingup Futures Strategic Area
- Dwellingup Futures Investigation Area

REGION SCHEME RESERVES (PRS)

- Regional open space
- Rural
- Primary regional roads
- Industrial
- State Forests
- Urban
- Special Control Area No 1 - water catchments

AGRICULTURAL ASSETS

- Rural Zoning

TOURISM ASSETS

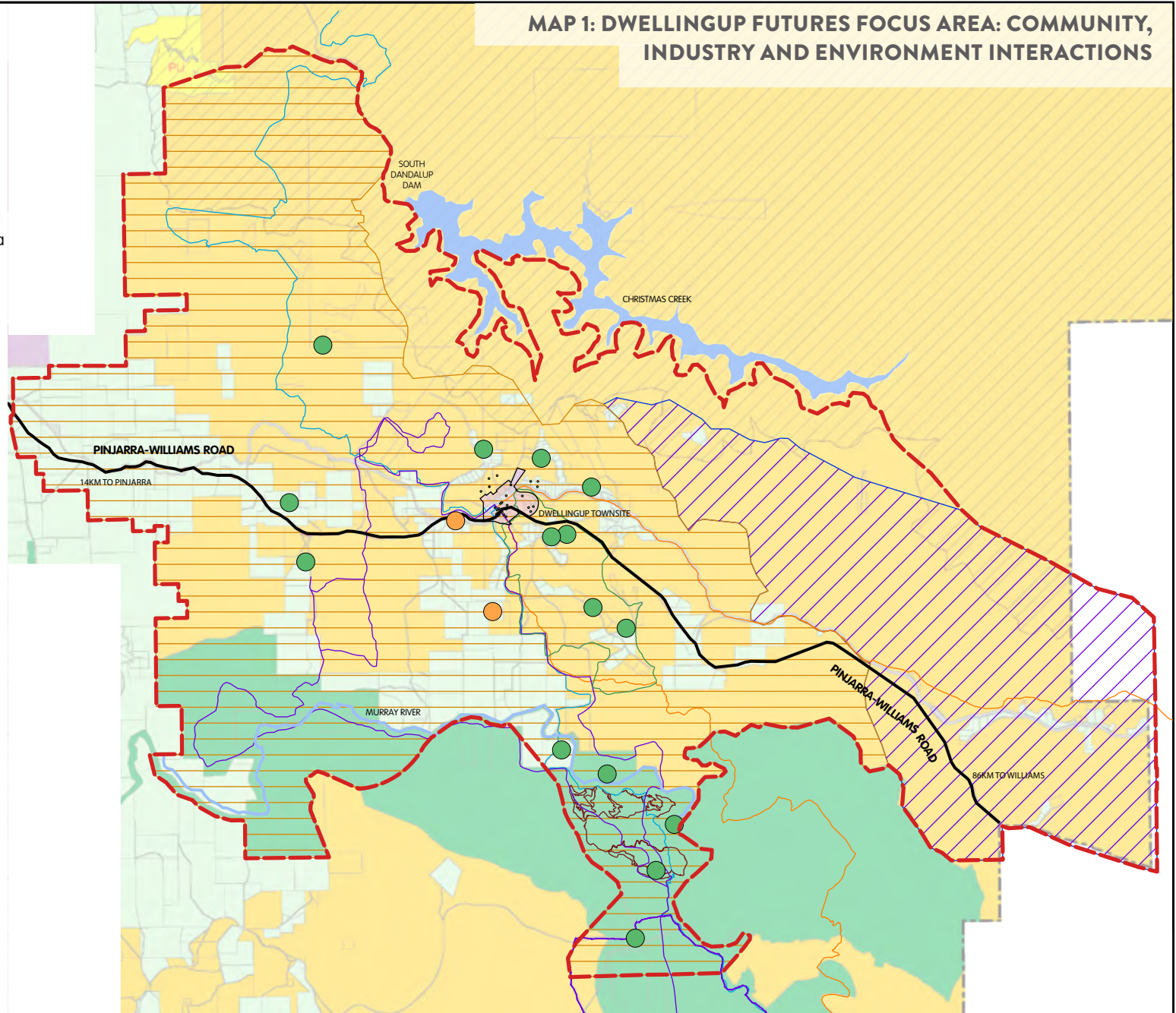
- Tourism activities and accommodation
- Food and Beverage

DPaW Managed Tracks and Trails

- Bibbulmun Track
- Munda Biddi Trail
- Walk Trail
- Mountain Bike Trails
- Les Couzens Bridle Trail

NOTES:

- ¹ Mining activities are not indefinitely precluded throughout the Dwellingup Futures Study Area, in line with MLISA
- ² Forestry activities are undertaken throughout the State Forest in the Focus Area as per existing statutory processes



JOB CODE:
MRYDRG

DRAW NO.
RD1004

REV.
A

HATCH

RobertsDay

MAP 2: DWELLINGUP FUTURES FOCUS AREA: COMMUNITY, INDUSTRY AND ENVIRONMENT INTERACTIONS - DWELLINGUP TOWNSITE

LEGEND

REGION SCHEME RESERVES (PRS)

| | |
|--|---|
|  Rural |  Industrial |
|  Primary regional roads |  State Forests |
|  Railways |  Urban |

AGRICULTURAL ASSETS

| |
|--|
|  Rural Zoning |
|--|




COMMUNITY AND INFRASTRUCTURE ASSETS



FOREST ASSETS





TOURISM ASSETS

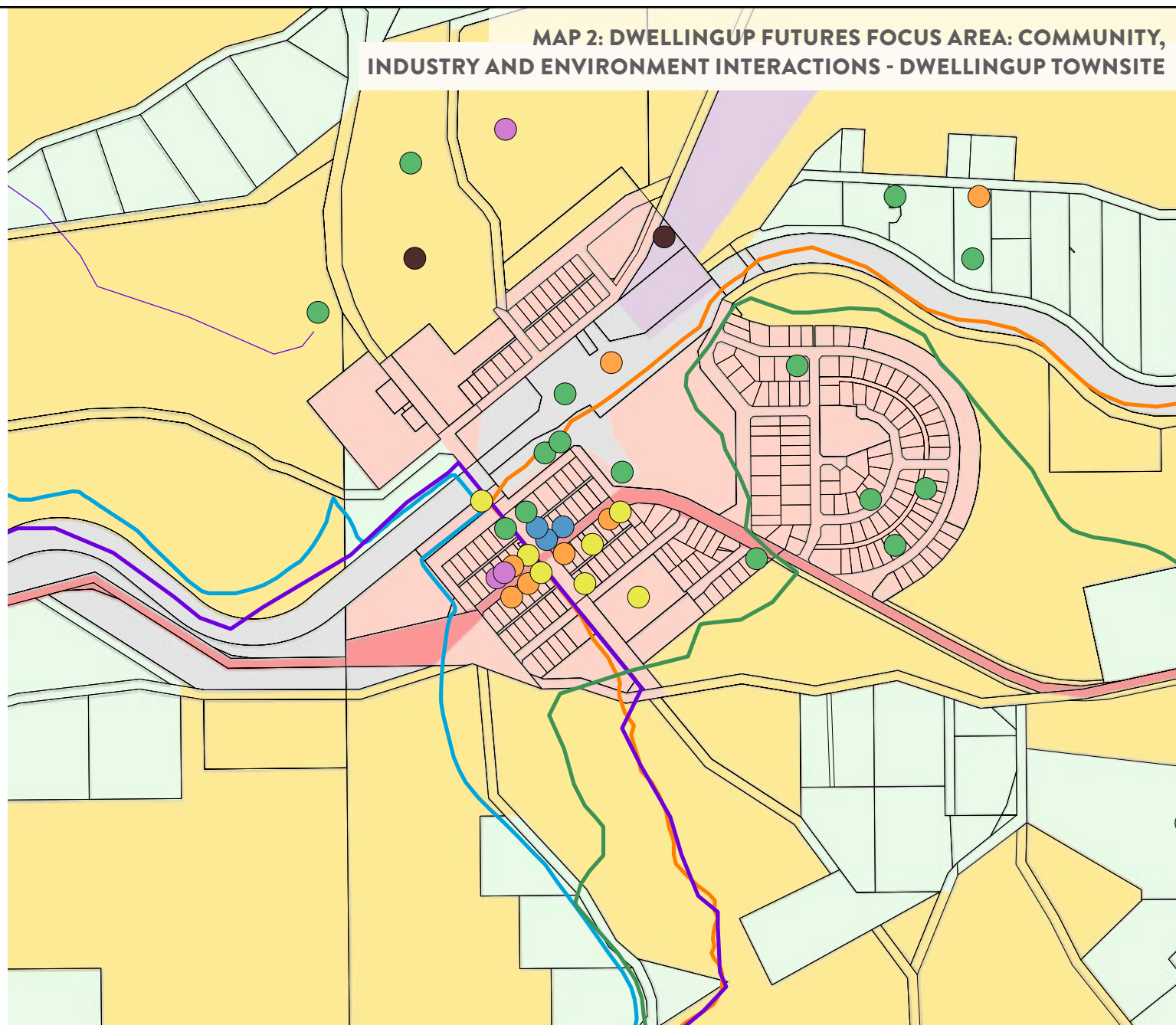
| |
|---|
|  Tourism activities and accomodation |
|  Food and Beverage |
|  Creative Arts |

TOWN CENTRE - COMMERCIAL ASSETS



DPaW Managed Tracks and Trails

| |
|--|
|  Bibbulmun Track |
|  Munda Biddi Trail |
|  Walk Trail |
|  Les Couzens Bridle Trail |



JOB CODE:
MRYDRG

DRAW NO.
RD1004

REV.
A

HATCH

RobertsDay

DISCLAIMER: ISSUED FOR DESIGN INTENT ONLY. ALL AREAS AND DIMENSIONS ARE SUBJECT TO DETAIL DESIGN AND SURVEY

5. DWELLINGUP'S PRIORITY PROGRAMS & IMPLEMENTATION PATHWAY

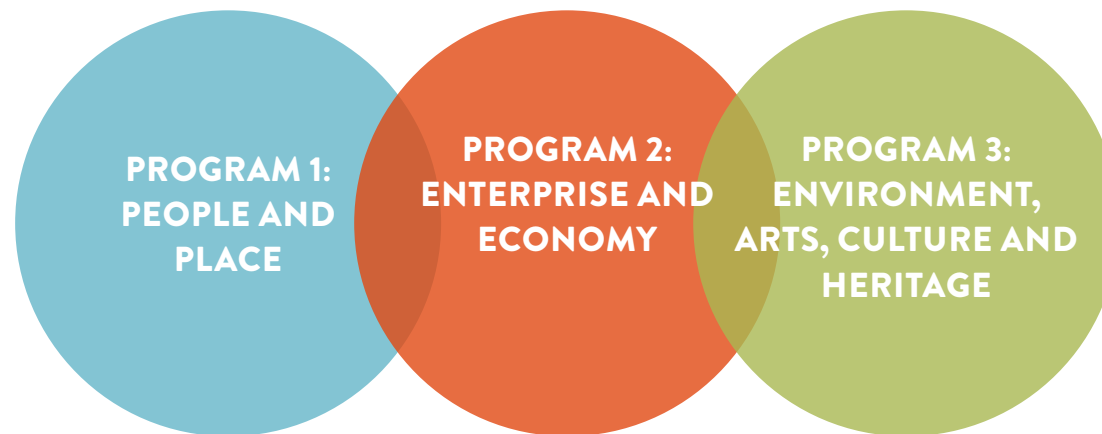


The following priority programs were identified as critical to addressing the key findings of the economic scenario analysis and the realisation of the aspirations identified in the Roadmap.

Program 1: People and place.

Program 2: Enterprise and economy.

Program 3: Environment, arts, culture, and heritage.



Aligned projects already underway, or short listed for action in the next 1 – 3 years are outlined on the following pages. Part II of the Roadmap outlines the more detailed descriptions of aligned actions and projects that are achievable over the short, medium and long term.

1. PEOPLE AND PLACE

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | TIMEFRAME |
|------------------------|--|--|--------------|
| MASTERPLANNING | Develop Dwellingup Precinct Structure Plan. | Review the Dwellingup Structure Plan and update as a Precinct Structure Plan to ensure the vision, goals, and recommendations of Dwellingup Futures are considered and addressed. | Underway |
| | Design guidelines supporting the retention of Dwellingup's small-town charm. | Develop design guidelines for future residential and commercial development, reflecting the Dwellingup community's stated desire for small-town charm to be retained. | Underway |
| SERVICING GROWTH | Understand and clarify bushfire parameters for future growth. | Utilise the Dwellingup Precinct Structure Plan review to consider the implications of the Roadmap, and identify potential solutions to contemporary bushfire rules/regulations that may limit Dwellingup's ability to accommodate target populations, visitors, and industries. | Underway |
| | Develop residential housing to service target population growth. | Utilise the Dwellingup Structure Plan review and Activity Centre Plan to identify opportunities for development of new residential housing supply appropriate for attraction of an additional 200 families to Dwellingup. | 4 - 10 years |
| | Build capacity for mixed-business industry. | Utilise the Dwellingup Precinct Structure Plan project to identify and de-risk development of a preferred location for a mixed business precinct that contains a minimum of 570m2 NLA of total additional mixed business floorspace. | Underway |
| | Marrinup Golf Course/Carriage Club Utilisation Plan | Work with the Dwellingup Carriage Club to support realisation of the old Dwellingup Golf Course as a dedicated events facility that may include dedicated events infrastructure, short-stay accommodation, and expanded trails infrastructure. Key issues to resolve include certainty of tenure for the Carriage Club, certainty over future mining impacts in proximity to the asset and adequacy of services such as power, water and wastewater. | 4-10 years |
| | Review requirements on casual short-stay accommodation. | Review the need / desirability of local planning, limiting the ability of residential housing rentals in Dwellingup to be utilised for casual short-stay accommodation. | 1 – 3 years |
| | Prioritise infrastructure planning, advocacy and business case development. | Utilise the Dwellingup Structure Plan, Activity Centre Plan and follow on activities to assess and quantify the required potable water, wastewater, energy, and telecommunications infrastructure required to service at least 242 additional dwellings for residents, at least 15 additional businesses and at least 42,000 additional annual overnight visitors. | Underway |
| WHOLE-OF-LIFE-SERVICES | Complete recreation precinct. | Complete the vision and delivery of a dedicated all-ages recreation precinct for Dwellingup residents and visitors. | Underway |

2. ENTERPRISE AND ECONOMY

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | TIMEFRAME |
|--|--|--|-------------|
| PROTECT AND ENHANCE KEY ECONOMIC ASSETS | Utilise the Dwellingup Futures Implementation Advisory Committee to negotiate an agreed management plan over key strategic economic assets. | Utilise the Dwellingup Futures Implementation Advisory Committee (DFIAC) to negotiate a management plan of key economic assets identified in the Roadmap that potentially warrant dedicated planning, investment and indefinite protection from future mining activities. These assets include but are not limited to: | 1 – 3 years |
| | | Major mountain biking and hiking trails; | |
| | | Major DBCA camping assets; | |
| | | High quality agricultural lands with strong potential for tourism and differentiated food-related development; | |
| | | Areas with potential for dedicated short-stay accommodation development; and Major education camps and assets. | |
| CELEBRATE THE TOWN CENTRE | Enhance commercial precinct in Dwellingup Town Centre. | Utilise way finding techniques and principles to provide visitors with a strong sense of arrival within the Dwellingup Town Centre (e.g. signage, painted/coloured asphalt). | 1 – 3 years |
| | Activate commercial precinct lane ways within the Dwellingup Town Centre. | Utilise Dwellingup Activity Centre plan to identify opportunities to activate lane ways within a designated commercial precinct. | 4-10 years |
| EXPANDING TOURISM SERVICES | Identify opportunities for dedicated short-stay accommodation developments in and around Dwellingup to deliver up to an estimated additional 115 overnight visitors. | Utilise the Dwellingup Activity Centre plan to identify and de-risk opportunities to develop short-stay accommodation that does not compete with housing/rental markets within Dwellingup. Considerations may include: | 1 – 3 years |
| | | Expansion of offer at the Forrest Discovery Centre; | |
| | | Provision of offer at Dwellingup Carriage Club; | |
| | | Provision of offer at Icy Creek; | |
| | | Repurposing of degraded rehabilitation areas; and Allowance of complementary accommodation offer on agricultural tourism assets. | |
| | Pinjarra/Mandurah/ Dwellingup tourist shuttle. | Promote and actively support the Pinjarra/Mandurah/Dwellingup shuttle currently being piloted by commercial operator. | Underway |
| | Dwellingup Gap Trails Project | Implement the Dwellingup Gap Trails Project, facilitating stronger linkages between major trail heads and Dwellingup Town. This will ensure the completion of visitor and community oriented recreation and tourism assets. Refer to WA Labour Plan for Murray . | 1 – 3 years |
| | Camping/campsite servicing. | Promote opportunities for enterprises to support existing and growing camping markets, with campsite services including gear hire, food delivery, etc. | 1 – 3 years |



| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | TIMEFRAME |
|--|---|--|-------------|
| CONTINUE TO BUILD DWELLINGUP'S TOURISM IDENTITY | Achieve accreditation of Dwellingup as an International Trails Town. | Leverage continued trail development (as advocated for in Gap Project), as the basis for recognition and promotion of Dwellingup as a recognised International Trail Town. | 4-10 years |
| | Support collective branding and promotion. | Support development of a local tourism industry collective that can take ownership of future branding, promotion and booking services. | 4-10 years |
| | Develop and contribute to a systemic approach to researching and planning for post-mine/forestry futures. | Seek to consult on mine closure plans with the State to utilise current investment in, and support for, the Cooperative Research Centre in post-mine futures (CRC-TIME) to develop a systemic approach to targeted data collection, benchmarking, analysis and planning for post mine/ Forestry futures. | 4-10 years |
| ENTERPRISE ATTRACTION DEVELOPMENT AND SUPPORT | Encourage dedicated 'pop-up' infrastructure in the town centre. | Support SMEs to trial new businesses during peak times through encouragement of 'pop up' offerings that do not detract from existing operations. | 4-10 years |
| | Support Indigenous businesses. | Work to support the development and growth of targeted Bindjareb Noongar enterprises operating in Dwellingup through targeted support and linkages into local, state, national and private entrepreneur support initiatives. | 1 – 3 years |
| | Support Hotham Valley Rail. | Work with Hotham Valley Rail to support the continued enhancement of branding, communications and products. Advocate for investment in key infrastructure, focusing on the linkage between Pinjarra/Dwellingup and platform realignment and upgrades. | 1 – 3 years |
| | WA Food Innovation Fund. | Utilise Regional food innovation support initiatives to provide local projects with opportunities to identify and de-risk high growth activities. | 4-10 years |
| INVESTMENT ATTRACTION | Develop Dwellingup-oriented investment pitches for State and Federal Government investment in projects that support the realisation of the Dwellingup Futures vision and goals. | Work to profile, prioritise and collectively advocate for investment key Dwellingup priority projects that may include but not be limited to: | 4-10 years |
| | | Utilisation of crown reserves for short stay accommodation solutions (potential to be investigated in Precinct Structure Plan); | |
| | | Upgrading of enabling service infrastructure to requirements as identified in the Precinct Structure Plan.; | |
| | | Investment in targeted social infrastructure and services to requirements as identified in the Precinct Structure Plan and other activities; | |
| | | Utilisation of under-utilised community assets (e.g. old visitors centre); and | |
| | | Development of key infrastructure that enhances the comparative value proposition of target industries. | |
| | Improve telecommunications | Identify ICT improvements across the Dwellingup area (eg, mobile phone coverage, Dwellingup townsite public wifi zone opened on days to coincide with events). Develop business case for upgrades, lock in funding pathways and delivery schedules. | 1 – 3 years |

3. ENVIRONMENT, ARTS, CULTURE AND HERITAGE

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | TIMEFRAME |
|---|---|---|-------------|
| PROTECT VULNERABLE NATURAL HERITAGE | Pursue determination of DPG's public nomination of Old Growth Forest. | Pursue efficient determination of the Dwellingup Protection Group's application for classification of Old Growth Forest within their nominated 'Murray Basin Protected Zone' and to provide further clarity on the potential ecological values of this parcel. | Underway |
| | Utilise the proposed fit-for-purpose Governance Structure to arrive at a shared position on the environmental heritage assets contained within and adjacent to DDF #4 and #5. | Utilise the proposed Governance Structure to capture insights and further research (from ongoing Alcoa, EPA and pre-approval processes, as well as Dwellingup Protection Group knowledge base/activities and DBCA knowledge/activities) to support Dwellingup Futures SWG to inform a shared understanding of the environmental heritage characteristics and potential trade-offs between mining and natural heritage retention in relation to: | 1 – 3 years |
| | | Dwellingup Protection Group's proposed Dwellingup Discovery Forest #4 (Drinking Water Protection Zone) and #5 (Murray Basin Wilderness Zone); and | |
| | | Potential impacts on adjacent areas including DDF # 3 (Wildfire Protection Zone), #6 (Timber Towns Heritage Zone), and private residences. | |
| | Monitor impacts of climate change on Forest. | Advocate for expanded resourcing to adequately monitor, evaluate, intervene and mitigate against impacts of climate change on northern Jarrah Forest ecosystems. | 4-10 years |
| CELEBRATE AND LEVERAGE DWELLINGUP'S HERITAGE | Expand Indigenous culture and heritage celebration and interpretation. | Work with local traditional owners and Indigenous owned enterprises to expand local interpretation services and products for tourism and education markets. Consideration may include but not be limited to: | 4-10 years |
| | | Support for development of a dedicated bush tucker trail; and | |
| | | Interpretation of the cultural significance of key sites and places. | |
| | Envisage future of mills and interpretation of sites. | Work with Forest Products Commission on community support programs to support the community's aspirations around preserving forest heritage. | 4-10 years |
| | Expand education programs through the Forest Discovery Centre. | Support the utilisation of existing assets at the Forest Discovery Centre to expand local experiential education offerings to students in relation to interpretation of the natural environment, Indigenous heritage, and Western heritage. | 4-10 years |
| FOSTER ARTS AND CULTURE | Leverage Icy Creek asset for environmental interpretation as a complement to adventure tourism offer. | Revamp the mothballed Icy Creek education asset to provide interpretation opportunities for student utilising private school camps, Nanga Bush Camp and potential campsite facilities at Icy Creek. | 4-10 years |
| | Dwellingup Arts Trail. | Support the development of a dedicated culture and arts trail through greater Dwellingup that celebrates the creativity and innovation of Dwellingup residents and enterprises. | 1-3 years |
| | Artist in residence program. | Provide continued support for artist in residence programs within local galleries to attract State, National and Internationally significant artists to celebrate the natural heritage of Dwellingup and engage with the Dwellingup creative community. | 4-10 years |





6. HAVE YOUR SAY

Now is the chance to have your say about the Dwellingup Futures Roadmap. You can answer the following questions via the Shire of Murray's Your Say Portal, which can be found at www.murray.wa.gov.au.

DWELLINGUP FUTURES VISION AND STRATEGIC PRIORITIES

- Q. What aspects of the Road Map's vision and strategic priorities resonate with you most and are they consistent with your aspirations for the future of Dwellingup?
- Q. Has anything been missed which should be captured in the vision or strategic priorities?

SCENARIOS

- Q. Considering the three growth scenarios, what stands out to you as key issues, challenges and opportunities for Dwellingup?

DWELLINGUP FUTURES PRIORITY PROGRAMS AND IMPLEMENTATION PATHWAY


- Q. Which actions and projects would you like to see prioritised to achieve your vision for Dwellingup?

GENERAL FEEDBACK




- Q. Do you have any other feedback or comments regarding the Dwellingup Futures Roadmap?

This document is a summary of two key, detailed reports which are available via the Shire of Murray's website, www.murray.wa.gov.au.

Part I – Economic Development Scenario Assessment

-  **Vision, goals and strategic priority areas** – An agreed vision and strategic intent for the future of Greater Dwellingup.
-  **Dwellingup Futures Scenarios** – Three future scenarios that identify and describe challenges and opportunities, while considering how different sectors, industries and land-uses in the Greater Dwellingup area can co-exist to the betterment of the town. Each scenario is supported by detailed social and economic modelling indicators relevant to the proposed vision and strategic intent for the future growth of Greater Dwellingup.
-  **Findings** – A set of key findings that explore the outcomes of the scenario analysis against the community's goals, informing recommendation actions outlined in Part II: Implementation Pathway Report.

Part II – Implementation Pathway Report

-  **Implementation structures and principles** – A strong governance structure to guide the implementation of the Roadmap.
-  **Priority programs** – Three core program areas within which key actions and projects are focussed.
-  **Detailed action plan** – An in-depth action-oriented document that steps out real world projects and initiatives, as well as the partnerships, resources and time frames required to realise them.

This report has been prepared by FAR Lane and Hatch Roberts Day in partnership with the Shire of Murray, Peel Development Commission, and the Dwellingup Futures Group.

The project team, Shire of Murray and Peel Development Commission acknowledges Dwellingup's traditional custodians, the Bindjareb People of the Noongar Nation, their continuing connection to the land, waters and community and pay our respects to their Elders both past and present.





DWELLINGUP FUTURES ROADMAP **2021-2036** AND BEYOND

**PART I – ECONOMIC DEVELOPMENT
SCENARIO ASSESSMENT**



DWELLINGUP
where trails meet

WILD@HEART



This report has been prepared by FAR Lane and Hatch Roberts Day on behalf of the Shire of Murray, Peel Development Commission and the Dwellingup Futures Group.

The Shire of Murray acknowledges Dwellingup's traditional custodians, the Bindjareb People of the Noongar Nation, their continuing connection to the land, waters and community and pay our respects to their Elders both past and present.

TABLE OF CONTENTS

| | |
|---|----|
| 1. INTRODUCTION | 4 |
| 2. DWELLINGUP FUTURES PROJECT | 6 |
| 3. DWELLINGUP 2021 | 10 |
| 4. A VISION FOR DWELLINGUP'S FUTURE | 14 |
| 5. DWELLINGUP'S FUTURE | 18 |
| 6. PREFERRED SCENARIO | 34 |
| 7. KEY FINDINGS..... | 46 |
| 8. GLOSSARY OF TERMS | 50 |
| 9. TECHNICAL APPENDICES LIST | 52 |





1. INTRODUCTION

A COMMUNITY EXPERIENCING CHANGE

Greater Dwellingup is a town experiencing a period of rapid change. Over the last 25 years it has evolved from a forestry and mining community that was a 'secret spot' to nature lovers, to a popular and accessible place that has a strong identity and value in the Western Australian community. This evolution has been driven significantly by investment, growth, and transformation across Greater Dwellingup's key industries of mining, tourism, recreation, forestry, and natural resource management.

The local demographic is also shifting, influenced by regional population growth, tree change retirement, and the types and level of employment availability. Significant planned eastern expansion of the Pinjarra town site and establishment of a major industrial precinct between Pinjarra and Greater Dwellingup (provided for in State and Local planning frameworks¹) presents potential regional employment and population implications that may impact upon the Greater Dwellingup community. A changing natural environment is bringing hotter weather and threatening the already fire-vulnerable Northern Jarrah Forest, a unique and sensitive ecosystem.

COVID-19 has brought significant demand for regional travel and short-stay accommodation to Greater Dwellingup. This, as well as the recently opened Dwellingup Trails and Visitor Centre, presents an exciting opportunity for local businesses and tourism development. Federal, State and Local Government jointly provided \$8.4million to helping the community realise its tourism potential through the Adventure Trails Project². Strong ongoing demand for regional experiences is also a challenge for this small community in ensuring the rental market continues to cater for long term residents, and Greater Dwellingup continues to be a place to live, not just to visit.

These changes are having a significant impact on the small but passionate community of 720 residents who live in Greater Dwellingup and its surrounds as they seek to realise a resilient and thriving community that can take advantage of opportunities and mitigate threats presented by change.

¹South Metropolitan Peel Subregional Framework

²<https://www.dbca.wa.gov.au/news/dwellingup-a-trailblazer-for-mountain-biking>

A ROADMAP FOR FUTURE GROWTH

To plan and manage for anticipated change and growth, the Shire of Murray, with the support of the Peel Development Commission (PDC), established the Dwellingup Futures Project and the Dwellingup Futures Group with the aim to develop a Roadmap outlining a vision and strategic intent for the future of Dwellingup. The goal of the Roadmap is to support Greater Dwellingup's community and key stakeholders, including Government and industry, to work towards a shared vision where convergent priorities are recognised, understood and acted upon and divergent points of view are able to be dealt with constructively. The Roadmap provides a critical resource, capturing the aspirations and priorities of the Dwellingup community. These will be used as a basis for community inputs into planning and statutory processes in the future. Importantly, the Roadmap itself is a strategic document that does not infer nor supersede any existing or future statutory rights or obligations.

The Roadmap is a two-part report that describes a vision for Greater Dwellingup's future and how the development of local key industries will influence to what extent that vision can be achieved. An implementation pathway that outlines the projects, partnerships and resources required to realise the community's goals is also included.

Part I – Economic Development Scenario Assessment

- **Vision, goals and strategic priority areas** – An agreed vision and strategic intent for the future of Greater Dwellingup.
- **Dwellingup Futures Scenarios** – Three future scenarios that identify and describe challenges and opportunities while considering how different sectors, industries and land-uses in the Greater Dwellingup area can co-exist to the betterment of the town. Each scenario (detailed appendix 1) is supported by detailed social and economic modelling indicators relevant to the proposed vision and strategic intent for the future growth of Greater Dwellingup.
- **Findings** – A set of key findings that explore the outcomes of the scenario analysis against the community's goals and informs recommendations actions outlined in Part II: Implementation Pathway Report.

Part II – Implementation Pathway Report

- **Implementation structures and principles** – A strong governance structure to guide the implementation of the Roadmap.
- **Priority programs** – Three core program areas within which key actions and projects are focused.
- **Detailed action plan** – An in-depth action-oriented document that steps out real world projects and initiatives and the partnerships, resources and time frames required to realise them.



2. DWELLINGUP FUTURES PROJECT

The Dwellingup Futures Project brings together the experience and expertise of a range of stakeholders and groups, ensuring the Roadmap captures a diverse range of perspectives and produces a robust vision that is genuinely reflective of community views. It is the culmination of extensive strategic, planning, engagement, and research activities, outlined in figure 1.

Figure 1 – Dwellingup Futures Project Timeline



Throughout the project, the stakeholders and groups outlined in figure 2 have been consulted with to understand their aspirations, develop and test assumptions and collect evidence. The Stakeholder Working Group (SWG - also known as Dwellingup Futures Group), supported by the Technical Advisory Committee (TAC) is the key group, chaired by the Peel Development Commission's Chairperson. They are responsible for driving the actions and outcomes of the Dwellingup Futures Roadmap. The Community Visioning Working Group (CVWG), comprising of 12 people, was heavily involved in a range of consultation activities, and were selected based on agreed criteria, via an Expression of Interest process.

Figure 2 – Dwellingup Futures Project Stakeholder Groups

| COLLABORATED | | CONSULTED | |
|------------------------------|--|-----------------------------------|---|
| STAKEHOLDER WORKING GROUP | <ul style="list-style-type: none"> Local groups and associations Government Agencies Alcoa of Australia | COMMUNITY VISIONING WORKING GROUP | <ul style="list-style-type: none"> Local interest groups Local businesses Local residents Local accommodation providers |
| TECHNICAL ADVISORY COMMITTEE | | | |

Stakeholder Working Group Members

Peel Development Commission Chairperson (Chair)
 Shire of Murray President (Deputy Chair)
 Department of Biodiversity, Conservation and Attractions
 Department of Primary Industry and Regional Development
 Peel Development Commission
 Department of Mines, Industry Regulation and Safety
 Department of Jobs, Tourism, Science and Innovation
 Department of Local Government, Sport and Cultural Industries
 Department of Premier and Cabinet
 Department of Planning, Lands and Heritage
 Department of Water and Environmental Regulation
 Forest Products Commission
 Alcoa Australia
 Dwellingup Community Compact
 Dwellingup Protection Group
 Peel Harvey Catchment Council

Technical Advisory Committee Members

Shire of Murray CEO (Chair)
 Peel Development Commission
 Alcoa Australia
 Department of Planning, Lands and Heritage
 Department of Water and Environmental Regulation
 Department of Primary Industry and Regional Development
 Department of Biosecurity, Conservation and Attractions
 Department of Local Government, Sport and Cultural Industries
 Department of Mines, Industry Regulation and Safety
 Department of Jobs, Tourism, Science and Innovation
 Peel-Harvey Catchment Council
 Forest Products Commission
 Scientist(s)

THE STUDY AREA

Throughout the development of the Roadmap and associated reports, several study areas were utilised when considering Greater Dwellingup's economic performance and future aspirations. These included:


- Greater Dwellingup – the area encompassing Dwellingup, and the activities and infrastructure in surrounding areas that may have a direct bearing on Dwellingup's economic development characteristics and/or the value proposition of the Dwellingup Town Centre. This is reflected by the study area boundaries in Map 1: Dwellingup Futures Focus Area;
- Dwellingup Town – the boundaries of the Dwellingup town site as defined by the Western Australian Planning Commission
- Shire of Murray – the municipal boundaries of the economy that services, and benefits from economic activities in Dwellingup and surrounds; and
- Statistical Study Area – boundaries for major ABS data sets that provide the most accurate snapshot of economic development activities, statistics and trends.

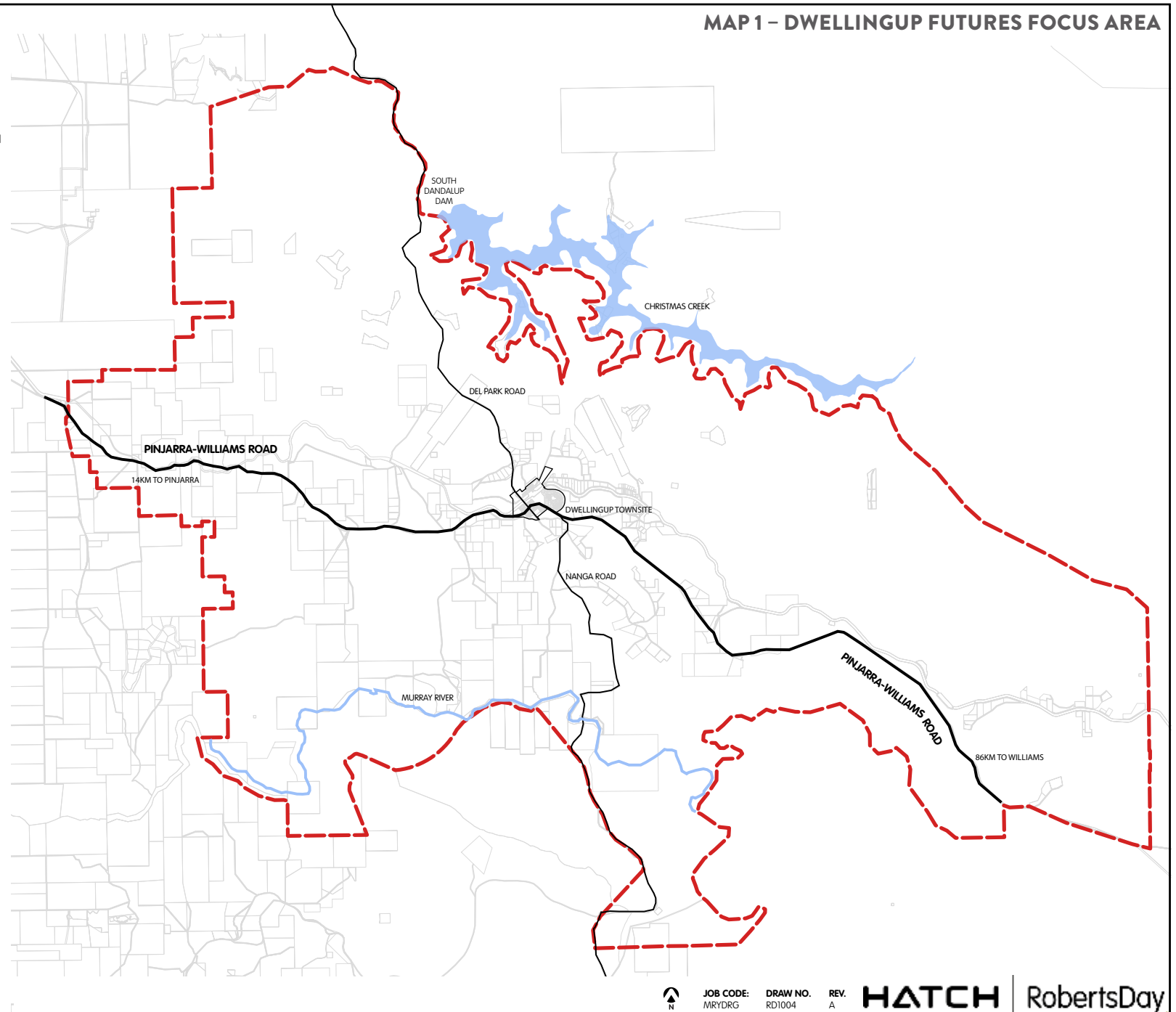
For the purposes of this Roadmap, “Dwellingup” will refer to the “Dwellingup Town” area as defined above. “Greater Dwellingup” will refer to the area encompassing Dwellingup, and the activities and infrastructure in surrounding areas that may have a direct bearing on Dwellingup's economic development characteristics and/or the value proposition of the Dwellingup Town Centre. In the mapping utilised throughout the document, this spatial area will be referred to as the Greater Dwellingup Focus Area. For further information and maps that describe the above study areas, please refer to Technical Appendix 6 – Study Areas and Maps.



MAP 1 – DWELLINGUP FUTURES FOCUS AREA

LEGEND

 Dwellingup Futures Focus Area



JOB CODE:
MRYDRG

DRAW NO.
RD1004

REV.
A

HATCH | RobertsDay

DISCLAIMER: ISSUED FOR DESIGN INTENT ONLY. ALL AREAS AND DIMENSIONS ARE SUBJECT TO DETAIL DESIGN AND SURVEY



3. DWELLINGUP 2021

Greater Dwellingup is located just over 1 hour south of Perth and situated in the natural beauty of the Darling Escarpment and is recognised as a sacred, spiritual dreaming place for the Bindjareb People of the Noongar Nation. Formally a major timber and milling centre of Western Australia, a forestry department was first established in Dwellingup in 1928 and was followed in 1952 by a Forestry Cadet School. A devastating bush fire in 1961 changed the profile the town. Greater Dwellingup has the charm of a historic country town but also attracts walkers and cyclists in large numbers as both the Munda Biddi and Bibbulmun Tracks pass through the community, while the surrounds are packed with hiking, mountain bike, 4-wheel drive and canoe trails.



COMMUNITY¹

- Total population of 721 (Greater Dwellingup).
- Town site population 354 .
- The population has remained approximately the same over recent years.
- The median age of residents is 46, two years older than the Shire of Murray and 10 years over the Greater Perth and Western Australia median age.
- The median weekly household income is \$1,200, approximately \$400, or 25% lower than Greater Perth and Western Australia.

¹ More detailed demographic analysis and evidence is available in technical appendix 1 Dwellingup Land Use Review, technical appendix 2 Dwellingup Futures Literature Review, and technical appendix 3 the Economic Trends and Land Use Analysis report.

AGE PROFILE²

- High proportion of adults aged between 40 and 70.
- Low proportion of young adults (aged) 15-30.
- High proportion of children (aged less than 15).

Young adults tend to move away from Greater Dwellingup for education and employment, whilst older adults and dependent children are more likely to reside in Greater Dwellingup.

THE NATURAL ENVIRONMENT³

- Greater Dwellingup is located within the Darling Escarpment and is home to a diverse range of flora and fauna.
- The Dwellingup town site is surrounded by State Forest in which fragmented areas of rural zoned farmland are present.
- The area is prone to drought and bushfires during dry seasons.
- The Northern Jarrah Forest is one of the most vulnerable ecosystems in Australia and requires careful management to ensure its survival.
- The balance between industry and environment has been relatively successful. However, negative impacts include dieback, the growth of non-native species and changes in soil quality in post-activity lands.



HOUSING AND LAND USE

- Median house sale price in August 2020 is \$340,000, a 3% decline from August 2016⁴.
- 24.8% of houses are rented, 37.6% are owned outright, and 33.2% are purchased⁵.
- In recent years there has been a general small to moderate decline in house prices⁶.
- In the year ending August 2020, 13 dwellings were sold, with all sales occurring between June and August.
- Sales per annum since 2017 has remained stable at over 10 Dwellings, with 2018 and 2019 having lower sales volumes of less than 10 Dwellings.
- There were 390 dwellings as of 2016⁷, 299 of these were reported to be occupied on Census night.
- Many properties have been recorded as currently being underdeveloped or underutilised⁸.

² More detailed demographic analysis and evidence is available in technical appendix 1 Dwellingup Land Use Review, technical appendix 2 Dwellingup Futures Literature Review, and technical appendix 3 the Economic Trends and Land Use Analysis report.

³ Dwellingup Protection Group Position Statement Technical Report

⁴ CoreLogic RP Data 2020

⁵ ABS Census 2016

⁶ Roberts Day – Land Use Review 2020

⁷ ABS Census 2016

⁸ Roberts Day – Land Use Review 2020

LOCAL POPULATION SERVICES

- St John Ambulance Volunteer Post.
- Dwellingup Primary School.
- Dwellingup Police Station.
- Australia Post Dwellingup.

ECONOMY

The majority of jobs based in Greater Dwellingup are in⁹:

- Mining - 35%, predominately in metal ore mining.
- Accommodation and food services – 14%, predominately in food and beverage service.
- Manufacturing, 11%.
- Tourism, 9%.

Greater Dwellingup's employed residents mostly work in¹⁰:

- Mining - 16%, predominantly metal ore mining.
- Accommodation and food services – 13% (predominately in food and beverage services).
- Manufacturing, 10%.

KEY INDUSTRIES

MINING ¹¹

Alcoa Australia has been operating as an integrated bauxite miner and alumina producer in the south-west of Western Australia since 1963 with bauxite mines (Huntly, Willowdale) and alumina refineries (Kwinana, Pinjarra, Wagerup). Alcoa Australia produce approximately 45% of Australia's alumina, the feedstock for aluminum. Alcoa's Huntly Bauxite Mine is the sole feedstock for the nearby Pinjarra Alumina Refinery as well as its Kwinana Refinery. As bauxite forms in shallow pods, a constantly moving mining footprint occurs followed by progressive rehabilitation. Huntly mining is currently located at Myara to the east of North Dandalup. The proposed next Huntly mining areas are Myara North and Holyoake. Studies are undertaken prior to mining to identify and (where appropriate) protect important environmental, cultural, and social values. Alcoa do not mine in gazette national parks, nature conservation reserves, Old Growth Forest, or other areas of high conservation value. Of the areas cleared, 77% have been rehabilitated and this work is ongoing. Historically bauxite mining has occurred near Dwellingup, both to the north and south, and is expected to do so in the future.

Future mining is subject to EPA assessment. Alcoa are currently seeking to modernise the environmental approvals for their Huntly Bauxite Mine and Pinjarra Alumina Refinery. In doing so they have submitted plans for environmental assessment by both the State and Commonwealth. Huntly currently mines about 27 Mtpa of bauxite with more than 90% supplied to the Pinjarra and Kwinana refineries.

⁹⁻¹⁰, ABS Census, 2016.

¹¹ Information provided by Alcoa Australia.

Pinjarra refinery currently produces about 4.7 Mtpa of alumina and has approval to produce up to 5 Mtpa. Production is expected to reach 5 Mtpa in coming years due to efficiency and operational improvements. Approval to produce up to 5.25 Mtpa will enable continued improvements over time. There are no plans for a major refinery upgrade.

● TOURISM

Tourism plays an important role within the Town, driven primarily by Greater Dwellingup's proximity to popular outdoor recreation sites that include hiking, mountain bike trails and water sports. Greater Dwellingup has a range of infrastructure that can support future tourism and visitation in the Town. This includes the development of the National Trails Centre and visitor centre, a 25km network of new mountain bike trails near Lane Poole reserve, the Dwellingup Gap Trails Project, the suspension bridge over the Murray River near Lane Poole, upgrading of key access roads, canoe launching and retrieval facilities at Lane Poole, 4wd trails and associated marketing and promotion.

Twenty-nine people were employed in arts and recreation services in Greater Dwellingup in 2016, reflecting 9% of the labour force¹². These figures also indicate significant growth from 2011. In 2011 approximately 8% (9 people) of the labour force were employed in arts and recreation, with 2% (14 jobs) of Greater Dwellingup and surrounding areas¹³.

This reflects growth in outdoor recreation more generally and the associated employment benefits of this. In 2016, 130 people were employed in Arts and Recreation in the Shire of Murray reflecting 2% of the population¹⁴.

^{12-15, 17-18} ABS Census 2011 & 2016

¹⁶ <http://www.swdc.wa.gov.au/our-region/statistical-data/timber.aspx>

In 2011, 113 people were employed in arts and recreation services in the Shire of Murray, representing 2% of the labour force¹⁵. This reflects a marginal decline in employment.

● FOREST PRODUCTS

Forestry was historically the primary industry of the area and maintains a significant level of activity within the Greater Dwellingup region. In Greater Dwellingup, timber is primarily harvested from state-managed forests and reserves as opposed to plantation timber that is often used in the forestry industry.

While there is no available forestry product data for Greater Dwellingup and Peel, as a broad indication South West Region log production has been relatively constant over the last decade. Marginal increases occurred between 2014 and 2017¹⁶. As a product of Greater Dwellingup's historical ties with forestry, there is a significant amount of land and infrastructure associated with historic mill activities which are now surplus to need.

Consultation with stakeholders identified that land could potentially be utilised for tourism experiences that interface with the Forest Discovery Centre and provide a foundation for Greater Dwellingup to re-establish woodwork education facilities.

The 2016 Census place of work data set identifies that approximately 19 people were employed in agriculture, forestry, and fishing within Greater Dwellingup and the surrounding areas, reflecting 6% of the labour force¹⁷. This is similar to 2011, where 17 people were employed, representing 3% of the labour force and does not suggest any significant changes in employment over this time period¹⁸.



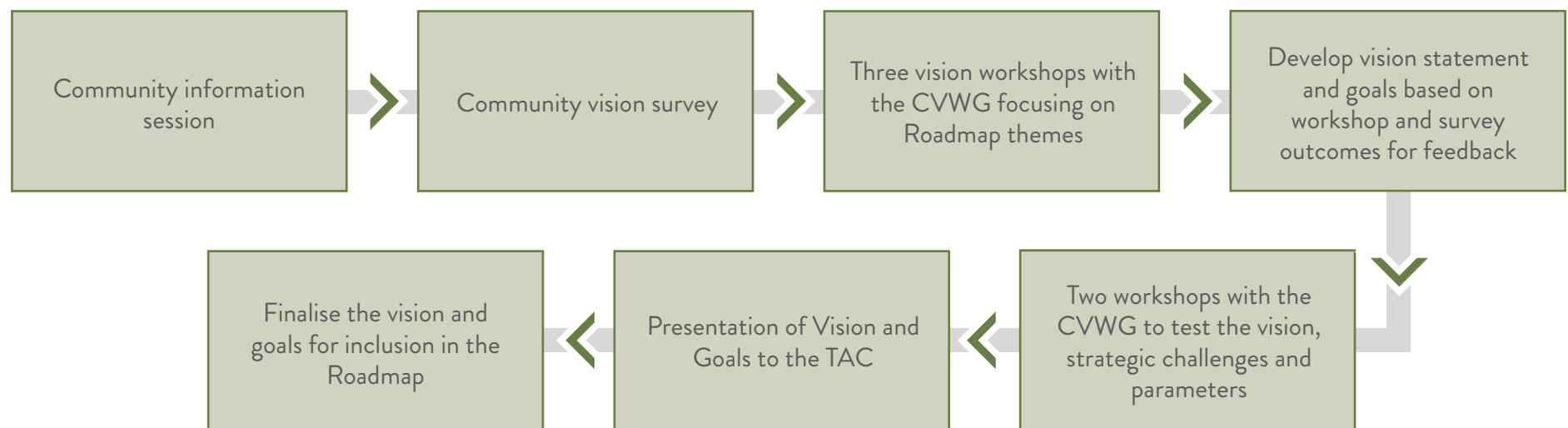
4. A VISION FOR DWELLINGUP'S FUTURE

THE VISIONING PROCESS

Capturing a diverse range of perspectives was essential in developing a robust vision that genuinely reflected community views. A comprehensive engagement program (outlined in figure 3) was conducted with community that included:

- Appointment of a 12-member Community Visioning Working Group (CVWG), comprising invited key stakeholders, Shire staff, as well as special interest groups, businesses and residents that were selected based on agreed criteria, via an Expression of Interest process; and
- A combination of community outreach activities, virtual focus groups and in-person meetings that involved interactive and structured questions and discussions to develop a vision and identify the goals and associated strategic challenges.

Figure 3 - The visioning process



Through this process, community members and stakeholders were able to discuss and explore what made Greater Dwellingup inherently unique, what changes were desirable or not, and how they wished for future change, growth, and development to impact the Town and surrounds. The process included some robust conversations where differences of opinion were heard, and assumptions were tested.

The group arrived at a consensus around the following three key elements of a vision for the future of Greater Dwellingup, which are explored further on the following pages.

- **Vision statement** – an over arching statement as to what will characterise future growth in Dwellingup.
- **Goals** – Broad aspirations that need to be achieved if the vision statement is to be realised.
- **Strategic Priorities** – Specific outcomes that need to be realised to support attainment of goals.

VISION

Future growth in Greater Dwellingup will emanate from making the most of our best assets – enhancing our natural resources, sharing our cultural heritage, supporting our people, and maintaining our small-town charm.

GOALS

1. Maintain our small-town charm so Greater Dwellingup will be an attractive, interesting place that is self-sufficient and sustainable in the services it offers families.

2. Grow a diverse and resilient economy, offering more pathways for local jobs and career opportunities.

3. Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities (such as mining, forestry, tourism, agriculture and recreation).

4. Protect and capitalise on our assets through education, creativity, cultural awareness and a scientific approach.

5. Community, Government and Industry cooperatively work together to achieve the objectives of the Dwellingup Futures Roadmap.

STRATEGIC PRIORITIES

Building a case for investment in community-oriented infrastructure, focusing on improving the quality of life of Greater Dwellingup residents.

Ensure small-town charm is retained whilst supporting growth required to support delivery of education, health, aged care, arts, creative and retail services within Greater Dwellingup.

Realise the capacity to grow population through housing supply that maintains and enhances the charm and unique character of Greater Dwellingup.

Ensure that economic activities complement Greater Dwellingup's small-town charm whilst providing local jobs and career opportunities to support population growth.

Proactively plan and manage economic activities that could impact each other (i.e. mining, tourism, training, education and the knowledge economy and natural resource management).

Increase availability of commercial land that might be required to accommodate additional mixed-use business type activities.

Ensure local business is equipped to take advantage of and service increased tourism visitation.

Develop a shared understanding of environmental risks and priority assets for protection.

Build a wider recognition of the role that the environment plays in Greater Dwellingup's economy, community, and culture.

Where possible, work on a negotiated outcome to proactively manage land-use conflicts.

Build an understanding of the roles that natural resources and industry play in supporting the Greater Dwellingup community.

Develop a shared understanding of priority assets for protection and/or utilisation.

Build recognition of the role that indigenous and non-indigenous cultural heritage will play in its future.

Build the case for natural resource management, science, and research opportunities to attract interest and investment in infrastructure requirements from both government and private entities.

Ensure that infrastructure, resources, training and economic activity are aligned to support natural resources management, science and research opportunities.

Foster willingness to engage around areas where there is substantial disagreement between stakeholders.

Build the energy and focus required to realise outcomes where there is strong alignment amongst stakeholders.

Develop pathways for collaborative engagements and partnerships to discuss and resolve community issues.

Ensure that all voices are heard, valued and able to contribute.

1. Maintain our small-town charm so that Greater Dwellingup will be an attractive, interesting place that is self-sufficient and sustainable in the services it offers families.

2. Grow a diverse and resilient economy to offer more pathways for local jobs and career opportunities.

3. Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities (such as mining, forestry, tourism, agriculture and recreation).

4. Protect and capitalise on our assets through education, creativity, cultural awareness and a scientific approach.

5. Community, Government and Industry cooperatively work together to achieve the objectives of the Dwellingup Futures Roadmap.

KEY SUCCESS INDICATORS: BY 2036

1.1 Dwellingup's population has reached 1,306.

1.2 18 additional childcare places have been created for local families.

1.3 There will be sufficient demand for the provision of a primary school for 100 students.

1.4 The development of short stay accommodation infrastructure does not impact upon the supply rental and owner-occupier dwellings for residents.

1.5 Residents have access to a full time GP and remote nursing services.

1.6 Residents can access high quality aged care in Dwellingup.

2.1. There are an additional 130 FTE jobs within the Dwellingup economy (includes the additional 26 FTE in 4.1).

2.2. An additional 133m² of retail floorspace and 1,608m² of commercial floorspace* has been identified and activated through new enterprises.

2.3. Visitors are spending \$31.59m per annum in Dwellingup.

2.4 Indigenous enterprises have been established and supported.

2.5 Dwellingup is recognised as a cultural and arts hub with a minimum of 15 arts-based enterprises making up the Dwellingup Arts Trail.

*Commercial floorspace include Accommodation and Food Services, Arts and Recreation, Education and Training, and Professional, Scientific and Technical Services.

3.1. Support realisation of common objectives through the implementation of the Roadmap Action Plan.

3.2. There is a map that reflects a shared understanding and agreed aspiration put forward by the Dwellingup Community as to natural, heritage and community assets that they believe should be indefinitely protected from industry impacts within the Dwellingup Future Zone.

4.1. Natural resource management and nature-based tourism activities are contributing to the local economy through an additional 26 FTE direct jobs.

5.1. A fit-for-purpose Implementation Advisory Committee, chaired by the Shire of Murray is actively consulted and informing decision making around land use for Dwellingup's key industries

5. DWELLINGUP'S FUTURE

APPROACH

Consistent in feedback across all visioning activities conducted throughout the Dwellingup Futures Project was the desire for Greater Dwellingup to be a self-sufficient place for families to live and where people have the access to the services they need (see Goal 1, page 16). The Dwellingup Futures Project required the consideration of a range of alternative future scenarios for Greater Dwellingup and development of an understanding of the extent to which each future scenario would position the community to realise their ultimate vision and goals.

Three plausible economic development scenarios were developed and tested, describing Greater Dwellingup across a 16-year period between 2021 and 2036. The purpose of these scenarios was not to predict the future, but to explore the implications of a range of plausible economic development outcomes, identifying opportunities and challenges that may need to be realised or addressed if the vision is to be supported. The implications of the scenarios will continue to have a bearing beyond the 2036 time frame considered in the modelling. However the variability in plausible outcomes beyond 2036 limits the value of analytic findings beyond this time frame.

Like many Western Australian regional communities, the future prosperity, vibrance, sustainability and resilience of Greater Dwellingup will be the result of its key industries performance, the characteristics of its community and how these two elements ultimately interact with each other. Therefore, consideration of Greater Dwellingup's future through three different plausible scenarios needs to account for the implications of both elements, as outlined in Figure 4.

Figure 4 – Community and industry impacts logic



SCENARIO DEVELOPMENT

Scenarios help us explore the future trajectories and characteristics of a place under a range of different circumstances by asking the question “How plausible is our vision if this future plays out?”.


For the purposes of the Dwellingup Futures Roadmap, Dwellingup’s future scenarios are based on the performance, interaction, and characteristics of its key industries:

- Bauxite mining;
- Tourism services (including recreation, hospitality, creative industries and retail); and
- Natural resource management, science and education.

Throughout consultation and research, these industries were identified as the most likely to have a significant influence on Greater Dwellingup and surrounds and impact the community’s articulated vision. Three unique scenarios, described in table 1, have been developed and tested to help us explore the potential influence of these industries.

Detailed scenario analysis (provided in appendix 1) was conducted to compare the three scenarios below. Analysis resulted in the identification of scenario three (diversified economy) as the scenario which provides the Dwellingup community with the best potential for achieving its vision, goals, and key performance indicators. As such, scenario three is the focus of the Roadmap and its recommendations.

Table 1 - Scenario summaries

| | |
|--|--|
|  SCENARIO 1 – BASE CASE | <p>Greater Dwellingup continues to be a small country regional town, characterised by limited population growth, an ageing population, supported by traditional mining and forestry and a day trip visitor economy with limited expenditure within the Town.</p> |
|  SCENARIO 2 – ADVENTURE TOURISM TOWN | <p>Greater Dwellingup is recognised as Western Australia’s adventure tourism town (focusing on trails) because of a high visitor growth trajectory and ongoing and significant public and private sector investment into this sector.</p> |
|  SCENARIO 3 - DIVERSE ECONOMY | <p>Greater Dwellingup has experienced significant tourism growth, while also focusing on developing arts, education, natural resource management and research industries, leading to a more diverse local economy.</p> |

SCENARIO ASSESSMENT

To assess the impact of industry trajectories against the vision and goals (page 16 and 17) our analysis takes into consideration:

People and place: Resident population characteristics, particularly the provision of population services and employment opportunities.

Enterprise and economy: Industry activity particularly Greater Dwellingup's and Peel's economic structure, infrastructure, land use, and workforce requirements.

Environment, culture and heritage: The natural environment, and its value as a driver of visitation and role as a general economic asset.

PEOPLE AND PLACE

Consideration of Greater Dwellingup's unique demographic structure and population characteristics is important for understanding the nature of impacts and changes the local population may experience across Greater Dwellingup's potential futures. Considerations include general demographic information, and the associated need for key services and amenities that support the wellbeing of Greater Dwellingup's resident population.

Greater Dwellingup's existing population characteristics were used in quantitative analysis to inform the nature of impacts that may arise from changes to future industries in the area. This includes:

- The ability for industry to provide employment for residents;
- The ability to retain existing Greater Dwellingup residents, and attract /accommodate new residents; and
- The ability to support sustainable population levels that drive the feasible provision of essential services.

The population projection analysis utilises the Shire of Murray's Forecast.id growth profile within the Rural South area as a baseline projection. Forecast.id's projection is based upon fertility rates and consultation with the Shire to determine the capacity for growth. To provide a more realistic representation of future population that accounts for likely growth resulting from industry, additional population derived from the estimated number of jobs driven by industry activity is included under each scenario (see technical appendix 4 for further details for how this is calculated).

A high-level target population was calculated to reflect estimated required population to support sustainable service delivery of the primary school. Based upon consultation outcomes, this is estimated to be 100 students. The model assumes 80% of primary school aged children in Greater Dwellingup would be enrolled in the primary school, therefore implying the population level needs to reflect 125 primary school aged children in Greater Dwellingup. Table 2 provides the estimated population and demographic characteristics in which outcomes from Greater Dwellingup's potential future scenarios are assessed.

Table 2 – Target demographic and population characteristics Greater Dwellingup 2020 - 2036

| INDICATOR | 2020 | 2026 | 2036 |
|-------------------------------------|--------|--------|--------|
| Total Population | 721 | 980 | 1,306 |
| Occupied Dwellings | 299 | 402 | 542 |
| Residents per occupied dwelling | 2.43 | 2.43 | 2.43 |
| 0-14 (School Aged) | 134 | 183 | 229 |
| 15-65 (Working Age) | 463 | 629 | 791 |
| 65+ | 124 | 168 | 212 |
| Aged Dependency Ratio | 27% | 27% | 27% |
| Labour Force (% of total residents) | 44.67% | 44.67% | 44.67% |

Source: Forecast.ID 2020, FAR lane 2020

Table 3 (page 22) outlines the key population characteristics considered throughout the scenario analysis. This includes information on population characteristics, its relevance to Greater Dwellingup's future, and the approach taken to evaluate and understand these characteristic within the context of Greater Dwellingup's future.

It should be noted that any future town site expansion required to accommodate population growth would need to be considered through formal statutory process (Region Scheme Amendment), or would need to be considered by the Western Australian Planning Commission. Such a proposal would need to address the State Planning Framework, including the Sub-regional Planning Frameworks, State Planning Policies, and advice provided by environmental agencies and servicing authorities.



Table 3. Treatment of resident population characteristics variables within the scenario impact assessment

| PEOPLE AND PLACE CONSIDERATIONS | RELEVANCE TO DWELLINGUP | IMPACT ASSESSMENT APPROACH |
|--|---|---|
| Future demographic and age profile | Understanding the age distribution and population size in Greater Dwellingup informs an understanding of the need for a range of population driven goods and services, as well as potential education, housing, and employment demands. | Shire of Murray population projections for Greater Dwellingup were used, and the number of individuals across key demographic groups were calculated. This acts to inform a range of subsequent analyses. |
| The need for and importance of childcare and primary schooling within Greater Dwellingup | Identified by the community and key stakeholders as a critical service to attract and retain local family-aged residents in Greater Dwellingup. | Estimates of demand for child care and primary education was based upon projected population scale and demographic profile of households. The development of a population target is based upon the population needed to sustain a vibrant local primary school with a sufficiently large school community. This acknowledges the key role it plays in both attracting and retaining families within Greater Dwellingup. |
| The provision of aged care and ageing in place services | Appropriate and accessible essential aged-related services are necessary to support and retain the growing aging population and maximise the wellbeing of the local population. | Estimates of demand for aged care and services was based upon projected population scale and demographic profile of target population. |
| Housing for current and future residents | Diverse owner-occupier and rental housing stock is important to attract and retain residents to Greater Dwellingup. | Estimates of demand for housing was based upon projected population scale and household characteristics. |
| Access to health services | Health services are important in ensuring the health and wellbeing of the resident population. Changing population characteristics into the future could potentially change the demand for local essential health services. | Estimates of demand for health services was based upon projected population scale and demographic profile. |
| Availability of local employment opportunities | The type and availability of local employment is essential in retaining and attracting a working-age population. | Estimates for local employment opportunities was based local jobs available across all industries compared to the number of local jobs assumed to be needed to support a target resident population. |
| The nature of local amenity | The scale, quality and type of local goods and services is a contributor to local amenity and influences the attractiveness of Greater Dwellingup as a place to live, work, visit and invest. | Estimates of potential demand and sustainability of local goods and services was estimated using projections of the total floorspace for local goods and services that could be sustained under each scenario. |



ENTERPRISE AND ECONOMY

Key industry trajectory (or activity) assumptions were developed via consultation with the project team and key stakeholders to inform the projected level of activity in each industry in terms of economic output and/or potential jobs.

The impact of differing industry trajectories is based upon:

- Profiling plausible variability and potential performance of key industries in terms of Greater Dwellingup and Peel regional employment (jobs) and regional output (\$m);
- Trends and characteristics that drive the industry activity, such as existing and planned projects, anticipated changes in technologies and supply chains, and external market trends; and
- Impact on Greater Dwellingup's economy in terms of workforce and infrastructure requirements, land use considerations and requirements, the industry's role and significance in the Regional economy, and the opportunities and constraints are likely to arise.

Table 4 - Treatment of enterprise and economic activity considerations within the scenario impact assessment

| ENTERPRISE AND ECONOMY CONSIDERATIONS | RELEVANCE TO DWELLINGUP | IMPACT ASSESSMENT APPROACH |
|--|---|--|
| Quantifying the economic impact of tourism | Greater Dwellingup's geography and natural assets support the local visitor economy and tourism. Changes in scale and the ability to harness opportunities and manage threats related to this industry will influence the future of Greater Dwellingup's economy. | Estimates of economic impacts of tourism on local and regional economies was calculated based upon Greater Dwellingup's future value proposition to visitors, and plausible market demand for services and products offered. Impacts include estimates of employment and economic output, and the variability that could occur under each scenario. |

| ENTERPRISE AND ECONOMY CONSIDERATIONS | RELEVANCE TO DWELLINGUP | IMPACT ASSESSMENT APPROACH |
|--|--|---|
| <p>Quantifying the economic impact of mining</p> | <p>Alcoa Australia has been operating as an integrated bauxite miner and alumina producer in the south-west of Western Australia since 1963 with bauxite mines (Huntly, Willowdale) and alumina refineries (Kwinana, Pinjarra, Wagerup). Alcoa Australia produce approximately 45% of Australia's alumina, the feedstock for aluminum. Alcoa's Huntly Bauxite Mine is the sole feedstock for the nearby Pinjarra Alumina Refinery as well as its Kwinana Refinery. As bauxite forms in shallow pods, a constantly moving mining footprint occurs followed by progressive rehabilitation. Huntly mining is currently located at Myara to the east of North Dandalup. The proposed next Huntly mining areas are Myara North and Holyoake. Studies are undertaken prior to mining to identify and (where appropriate) protect important environmental, cultural, and social values. Alcoa do not mine in gazette national parks, nature conservation reserves, Old Growth Forest, or other areas of high conservation value. Of the areas cleared, 77% have been rehabilitated and this work is ongoing. Historically bauxite mining has occurred near Dwellingup, both to the north and south, and is expected to do so in the future.</p> <p>Future mining is subject to EPA assessment. Alcoa are currently seeking to modernise the environmental approvals for their Huntly Bauxite Mine and Pinjarra Alumina Refinery. In doing so they have submitted plans for environmental assessment by both the State and Commonwealth. Huntly currently mines about 27 Mtpa of bauxite with more than 90% supplied to the Pinjarra and Kwinana refineries</p> <p>Pinjarra refinery currently produces about 4.7 Mtpa of alumina and has approval to produce up to 5 Mtpa. Production is expected to reach 5 Mtpa in coming years due to efficiency and operational improvements. Approval to produce 5 Mtpa will enable continued improvements over time. There are no plans for a major refinery upgrade.</p> | <p>Estimates of economic impacts of mining on local and regional economies was informed by future production plans outlined in Alcoa of Australia Limited's Environmental Assessment Fact sheet (March 2021) regarding its current Environmental Protection Authority application¹⁶ and consultation with industry. Input from Alcoa suggested that mining activity be considered constant across all scenarios:</p> <ul style="list-style-type: none"> • Mining in the Myara North region is planned for 2025 – 2030¹⁷; • Mining in Holyoake expected to commence 2030 (pending PER - Public Environmental Review) and involve the relocation of 450 mining jobs into the Study Area; • Alcoa's production is expected to reach that 5 Mtpa limit, with potential to produce up to 5.25Mtpa if major upgrades take place; • Operations at Holyoake are estimated to relocate 450 existing jobs into the Study Area. This equates to a total of \$717 million of mining output per annum. Under a base case scenario, this represents approximately 18% of the Dwellingup's economic output This is largely due to mining having the highest output per job ratio of \$1.291m per job¹⁸. • Almost 30% of all mining workers in the Shire of Murray were aged 50 years old in June 2016¹⁹. Assuming a similar demographic profile at Holyoake, potential 130 employees at Holyoake could retire by 2036. Assuming jobs remain available - this presents an opportunity for up to 130 new employees to work at Holyoake. Scenarios will consider how these jobs could potentially cater new families if there is additional available housing supply within Greater Dwellingup. <p>Plausible future economic impacts were estimated for local and regional employment, and economic output. Scenario assessment considers the interaction of mining with other industries.</p> |

¹⁶ Environmental Assessment Fact sheet Huntly Bauxite Mine & Pinjarra Alumina Refinery, Alcoa 2021

¹⁷Ibid, Alcoa of Australia Ltd.

¹⁸REMPAN 2020

¹⁹ABS 2016



| ENTERPRISE AND ECONOMY CONSIDERATIONS | RELEVANCE TO DWELLINGUP | IMPACT ASSESSMENT APPROACH |
|---|---|--|
| | <p>Alcoa of Australia operates under the Alumina Refinery Act 1961, Alumina Refinery (Pinjarra) Agreement Act 1969, and Alumina Refinery (Wagerup) Act and Acts Amendment Act 1978. Alcoa's Mineral Lease – Mineral Lease 1 State Agreement (ML1SA) is granted under the Alumina Refinery Act 1961. Alcoa's tenure and royalty rates are established in the State.</p> <p>The characteristics of Greater Dwellingup's interactions with mining is influenced by the types of activities, location and scale of exploration, extraction, logistics, processing and rehabilitation activities. Community support programs delivered by mining operators also acts as a significant input into local community and local economic development infrastructure.</p> <p>Map 2 provides an overview of Alcoa of Australia's planned activities in the Dwellingup Futures Zone.</p> | |
| Quantifying the economic impact of agriculture, forestry and fishing | <p>Important historic industries with current activities are still contributing to Greater Dwellingup's economy.</p> <p>Agriculture is a growing driver for day visitation, with Forestry operations and milling continuing in and around Greater Dwellingup.</p> | <p>Estimates of economic impacts of agriculture on local and regional economies were based on local production's role as a tourism and produce export asset.</p> <p>Estimates of economic impacts of forestry on local and regional economies were assumed to remain constant as suggested through consultation with the Forest Products Commission.</p> |
| Quantifying the economic impact of natural resource management activities | <p>Local assets, knowledge and products resulting from historic forestry, NRM, and rehabilitation activities was recognised by stakeholders as a significant opportunity to be leveraged.</p> | <p>Estimates of economic impacts of natural resource management activities on local and regional economies were based upon the leveraging of activities for relevant public administration and safety, scientific, tourism and education purposes.</p> |
| Changing workforce requirements and employment opportunities | <p>Under different futures for Greater Dwellingup, the type, scale and nature of the workforce is likely to vary. Understanding these potential impacts is important when considering Greater Dwellingup's future.</p> | <p>Estimates of future employment requirements to support a resident population are estimated under each scenario.</p> <p>Local employment requirements were disaggregated by industry to provide indications of industry specific employment impacts.</p> |
| Quantifying the economic impact of local goods and services within Greater Dwellingup | <p>The potential futures and changes that Greater Dwellingup may experience are likely to impact the scale of demand for local goods and services, and the type demanded. Understanding potential impacts in this area may support an appropriate response, maximising the performance of local businesses.</p> | <p>Estimates of economic impacts of natural resource management activities on local and regional economies were based upon the demand from goods and services resulting from projected local residents, visitors, workers and businesses.</p> |








Map 2 provides a spatial representation of the economic and industry assets within the Dwellingup Futures Focus Area.

MAP 2: DWELLINGUP FUTURES FOCUS AREA: ECONOMIC ASSETS


LEGEND

 Dwellingup Futures Focus Area



REGION SCHEME RESERVES (PRS)

- | | |
|--|---|
|  Regional open space |  Industrial |
|  Rural |  State Forests |
|  Primary regional roads |  Urban |
|  Special Control Area No 1 - water catchments | |



AGRICULTURAL ASSETS

-  Rural Zoning






MINING ASSETS

-  Holyoake Mine Study Area 2021 (Alcoa) ¹
-  Transport Study Area (Alcoa)

TOURISM ASSETS

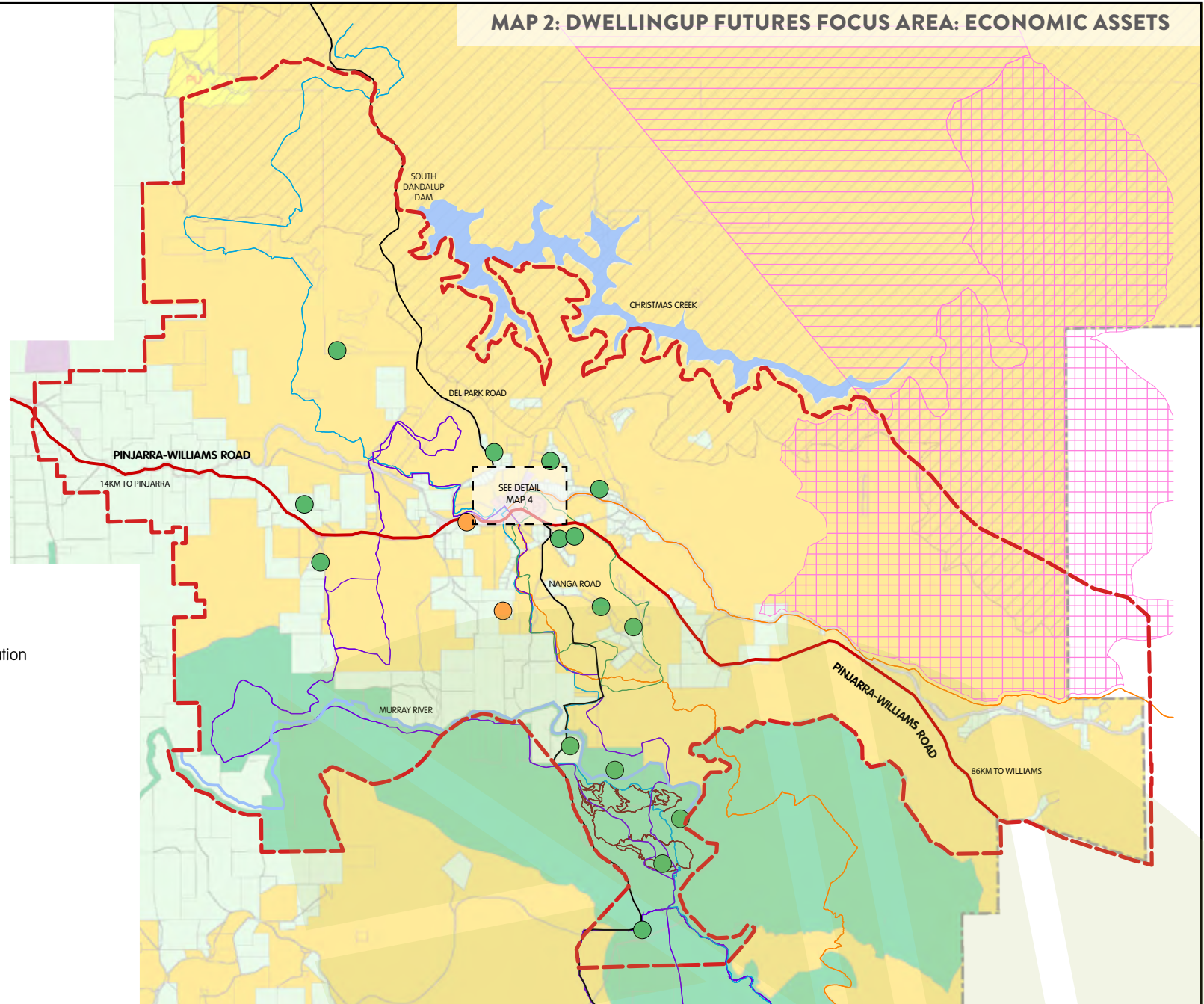
-  Tourism activities and accomodation
-  Food and Beverage

DPaW Managed Tracks and Trails

-  Bibbulmun Track
-  Munda Biddi Trail
-  Walk Trail
-  Mountain Bike Trails
-  Les Couzens Bridle Trail

NOTES:

¹ The Holyoake Mine Study Area 2021 does not consider other potential future mining as part of the broader MLISA



JOB CODE:
MRYDRG

DRAW NO.
RD1004

REV.
A

HATCH

RobertsDay

ENVIRONMENT, ARTS, CULTURE AND HERITAGE

Quantifying the socioeconomic value of the natural environment is inherently complex. Assessment of environmental impacts within the scope of this Roadmap primarily focused on real and perceived risks associated with changes resulting from scenario parameters.

Particular challenges in evaluating the local environment included a lack of agreed data about changes the natural environment may experience in the future under different growth scenarios. Furthermore, whilst there is multi-generational value in retention and enhancement of environmental assets, it is not yet clearly reflected in market prices. It is important to note the Environmental Protection Act (1986) continues to be the statutory mechanism through which issues concerning the value of the natural environment need to be addressed. Table 5 presents some key environmental considerations and their overall relevance for the future of Greater Dwellingup:

Table 5 - Treatment of natural environment considerations within the scenario impact assessment

| ENVIRONMENT, ARTS, CULTURE AND HERITAGE CONSIDERATIONS | RELEVANCE TO DWELLINGUP | IMPACT ASSESSMENT APPROACH |
|---|---|---|
| The value of Greater Dwellingup's natural environment for its contribution to brand and identity of Greater Dwellingup | <p>The natural environment has economic value in terms of attracting residents, visitors, and tourists.</p> <p>The natural environment also has value for consumers who choose to visit and 'use' Greater Dwellingup and surrounds.</p> | Judgement of the comparative risks of alternative scenarios associated with the natural value proposition of Greater Dwellingup to residents and visitors is considered in the impact assessment. |
| The cost and change in the inherent value of Greater Dwellingup's environment resulting from industry activities and future expansion | Degradation and changes to the local environment will present costs and impact the inherent value of the natural environment in Greater Dwellingup. | Assumption that this is considered via normal NRM, statutory planning and environment assessment processes (EPA 1986), as well as DBCA's Lane Poole Management Plan and Forest Management Plan, and therefore outside of the scope for assessment within the Roadmap. |
| The value of the natural environment for bushfire protection | Dwellingup is particularly vulnerable to bushfires. This presents risks and associated costs for Greater Dwellingup and its residents. | Assumption that this is considered via normal NRM, statutory planning and environment assessment processes (EPA 1986), as well as DBCA's Lane Poole Management Plan and Forestry Management Plan, and therefore outside of the scope for assessment within the Roadmap. |

| ENVIRONMENT, ARTS, CULTURE AND HERITAGE CONSIDERATIONS | RELEVANCE TO DWELLINGUP | IMPACT ASSESSMENT APPROACH |
|--|---|---|
| The value of the local environment on broader and existing ecological systems | The natural environment also holds value in relation to the broader ecosystem and habitats that it contributes to. The Greater Dwellingup environment cannot be considered in isolation from the broader ecosystem. | Assumption that this is considered via normal NRM, statutory planning and environment assessment processes (EPA 1986), as well as DBCA's Lane Poole Management Plan and Forestry Management Plan, and therefore outside of the scope for assessment within the Roadmap. |
| The value of Indigenous heritage and cultural assets located in Greater Dwellingup | There is long standing but not well understood Indigenous cultural heritage assets within Greater Dwellingup that should be properly profiled, recorded, protected, and celebrated. The South West Native Title Settlement and the soon to be formed Noongar Regional Corporation, 'Gnarla Karla Boodja' can help underpin this transformation. | Assumption that this is considered via normal NRM, statutory planning and environment assessment processes (EPA 1986), as well as DBCA's Lane Poole Management Plan and Forestry Management Plan, and therefore outside of the scope for assessment within the Roadmap. |

Map 3 provides a spatial representation of the Dwellingup Future's Focus Area's environmental and heritage assets. It should be noted that data relating to threatened flora and threatened fauna shape files are point data only and represent a location where a threatened species has been recorded. As this data is continually being updated and any future developments are likely to require a degree of threatened species survey prior to approval it is suggested by the Department of Biosecurity, Conservations and Attractions (DBCA) that this data is not displayed on the maps within the Roadmap.



MAP 3: DWELLINGUP FUTURES FOCUS AREA: ENVIRONMENT AND HERITAGE ASSETS

LEGEND

- Dwellingup Futures Focus Area
- Holyoake Mine Study Area 2021 (Alcoa) ¹
- Transport Study Area (Alcoa)

DBCA - Legislated Lands and Waters (DBCA-011)

- Gazetted
- Un-Official
- Un-Named

Forest Disease Risk Areas (DBCA-024)

H Places of Heritage Value (Shire of Murray TPS No. 4)

 Aboriginal Heritage Places (DPLH)

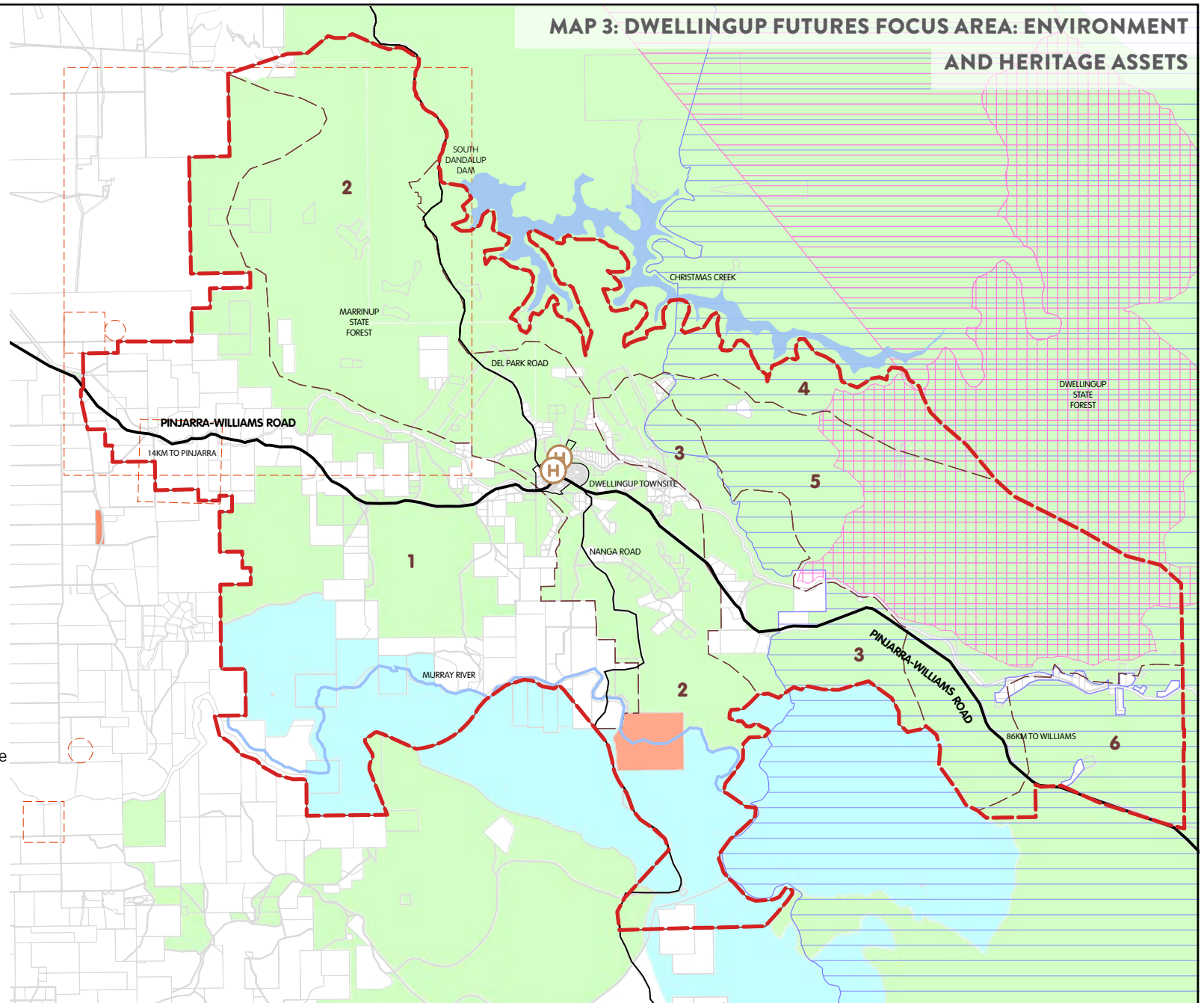
Dwellingup Protection Group's Proposed Dwellingup Discovery Forest Zones²

- 1 Water and Forest Conservation Zone
- 2 Recreation Zone
- 3 Wildlife Protection Zone
- 4 Drinking Water Protection Zone
- 5 Murray Basin Wilderness Zone
- 6 Timber Townsites Heritage Zone

NOTES:

¹ The Holyoake Mine Study Area 2021 does not consider other potential future mining as part of the broader ML15A

² DDF Zones do not have statutory recognition



JOB CODE:
MRYDRG

DRAW NO.
RD1004

REV.
A

HATCH

RobertsDay

DISCLAIMER: ISSUED FOR DESIGN INTENT ONLY. ALL AREAS AND DIMENSIONS ARE SUBJECT TO DETAIL DESIGN AND SURVEY




Photo courtesy of Josh Cowling

5.4 SCENARIO ANALYSIS OUTCOME SUMMARY

Table 6 provides a summary of the analysis conducted on all three scenarios based on the population, industry and environmental considerations described in this section. Detailed scenario analysis can be found in appendix 1 of this document.

Analysis resulted in the identification of scenario three (diversified economy) as the scenario which provides the Dwellingup community with the best potential for achieving its vision, goals, and key performance indicators. As such, scenario three is the focus of the Roadmap and its recommendations.

Table 6 - Scenario analysis outcome summary

| | DESCRIPTION | IMPLICATIONS FOR DWELLINGUP | OUTCOME |
|--|--|---|--|
|  <p>SCENARIO 1 – BASE CASE</p> | <p>In 2036, uncoordinated and sporadic investment, and unmanaged growth capacity constraints mean that Greater Dwellingup continues to be a community that is characterised by limited population growth, an ageing population, supported by traditional mining and forestry and a day trip visitor economy with limited interactions with the town.</p> | <p>Under this scenario:</p> <ul style="list-style-type: none"> • There is limited nor sustained public or private sector investment beyond current levels into local industry development, including tourism. • Greater Dwellingup is over reliant on a single industry (tourism) for growth, resulting in stagnant population growth that presents barriers to investment in social amenities and employment opportunities within Greater Dwellingup. • A lack of availability of housing stock constrains the number of new families that can be supported, limiting opportunities for population growth. • Increased visitation driven by high volume tourism offerings (i.e. trails and the Dwellingup Trails and Visitors Centre), are not translating into an increase in additional visitor expenditure capture that drives investment in the Town. • Mining continues to be a key industry providing significant local employment within Greater Dwellingup (32% of total employment). • Other key industries such as natural resources management, agriculture, forestry and arts and culture experience low or no growth due to limited investment and strategic focus. | <p>Greater Dwellingup retains its small- town charm but does not realise the population and economic growth required to support local services and self-sufficiency.</p> <p>Post COVID-19</p> <p>Except for tourism (which experiences moderate growth), local industries experience low growth or stagnation.</p> |

| | DESCRIPTION | IMPLICATIONS FOR DWELLINGUP | OUTCOME |
|---|--|--|--|
|  <p>SCENARIO 2 – ADVENTURE TOURISM TOWN</p> | <p>In 2036, Greater Dwellingup is recognised as an International Trails Town, driven by high visitor growth and ongoing and significant public and private sector investment into this sector.</p> | <p>Under this scenario:</p> <ul style="list-style-type: none"> • Small and medium sized enterprises are established in Dwellingup, capitalising on the thriving visitor economy. • There is sustained public and private sector investment into Dwellingup's tourism infrastructure and initiatives, including trails, accommodation and services. • Rapid and significant growth of adventure tourism (including land and water experiences) impacts Greater Dwellingup's ability to retain community oriented small-town charm and residents. • High demand for casual short-stay accommodation impacts availability of and owner-occupier housing for permanent residents (existing and future). • The scale of adventure tourism activity represents management challenges to mitigate negative impacts on the local natural environment (land and water). • Mining continues to be a key industry providing significant local employment within Greater Dwellingup (30% of total employment). • Other key industries such as natural resources management, agriculture, forestry and arts and culture experience low or no growth due to limited investment and strategic focus. | <p>Greater Dwellingup becomes a vibrant adventure destination for regional, state, national and international visitation.</p> <p>Limited housing stock prevents Greater Dwellingup from realising any population growth required to support additional local services and self-sufficiency and negatively impacts the Town's character.</p> <p>Over time, there is an increased potential for conflict between tourism and mining activities as the footprint of the two industries begins to overlap.</p> |
|  <p>SCENARIO 3 – DIVERSIFIED ECONOMY</p> | <p>In 2036, Greater Dwellingup is recognised as an International Trails Town, while also focusing on developing a range of nature and creativity-oriented industries, leading to a more diverse and resilient local economy.</p> | <p>Under this scenario:</p> <ul style="list-style-type: none"> • Small and medium sized enterprises are established in Dwellingup, capitalising on the thriving visitor economy. • There is sustained public and private sector investment into Dwellingup's tourism infrastructure and initiatives, including trails, accommodation and services. • Investment in agriculture and natural resources management activities and projects are strongly aligned with community vision. • Greater Dwellingup's tourism offer is diverse, and geared toward nature, education, arts and Indigenous-based tourism experiences. • Sustainable and managed growth allows the community to mitigate the risks of the demand for short stay accommodation overwhelming local housing stocks and eroding community character. • A more diverse food, retail, arts, and hospitality offer has grown and is attracting different visitor segments. • Mining continues to be a key industry providing significant local employment within Greater Dwellingup (28% of total employment). | <p>With a diverse tourism offer acting as an anchor for a diverse local economy, Greater Dwellingup achieves an employment level sufficient to support a population likely to attract and retain local services.</p> <p>Moderate and sustainable economic growth and a proactive approach to housing development supports a growing population, while maintaining character, protecting natural assets, and creating jobs and business opportunities.</p> |



6. PREFERRED SCENARIO



SCENARIO 3 - DIVERSIFIED ECONOMY

Based upon research, analysis and consultation undertaken, the Roadmap process has identified that Scenario 3 - Diverse Economy will most plausibly support the realisation of the Roadmap's vision. Economic diversification is key to reducing over-reliance on particular sectors and industries. The broader the economy, the more resilient it is to shocks. It is also key to driving productivity growth and remaining competitive, and is better at securing quality, high paying jobs through increased investment.

Under Scenario 3, Greater Dwellingup is a highly liveable community that is growing sustainably, managing to strike a balance between visitors and residents. Proactive planning and development have resulted in housing no longer being a constraint to residential population growth. Place making activities have been oriented towards creating vibrancy, amenity, and services for the local population – making it a great place for people to live. The population of Dwellingup has grown to a point where it comfortably sustains the required community-oriented services such as child-care, schooling, aged-care and health care.

The completion of the Adventure Trails Project and COVID-19 resulted in an initial spike in travel to Greater Dwellingup - this has been capitalised on through ongoing public and private sector investment, and Dwellingup is established as an International Trails Town that enjoys strong and stable visitation. Most people are coming to the

region for day trips, however 42,000 of new annual visitors are staying overnight. They typically camp at Lane Poole Reserve or utilises short stay accommodation in the town. A focus on providing more bookable experiences is increasing the capture of visitor spend within Greater Dwellingup, resulting in an increased contribution of tourism to the local economy. Connectivity with Pinjarra is enhanced through increased rail connections and Hotham Valley Steam Train services.

Tourism investment prioritises and celebrates Greater Dwellingup's natural resources, and creative culture, offering a unique combination of adventure, arts, science, education, and nature- based experiences. Visitors are coming to Greater Dwellingup for the day to experience Indigenous culture and history, as well as a booming arts scene which enhances the area's unique character and charm. A diverse tourism offer and increased visitation enables investment in new food and dining experiences that are putting the community on the map.

A strong focus on natural resource management has brought additional local research projects which are tied to the Bushfire Centre of Excellence, bush regeneration, post-mine futures and mine site rehabilitation. This has resulted in new jobs in professional, scientific, technical, public administration, safety, education and training sectors.

Greater Dwellingup's natural assets, Indigenous heritage and Western heritage are celebrated through experiential education products and services focused on school groups. These products also augment the outdoor education syllabus activities already undertaken in Greater Dwellingup.

Mining activities continue as described in table 4, page 25, and the local retail offer grows moderately based on increased visitor and permanent resident demand.

The key characteristics of scenario 3 are described in table 7. Assessment of the scenario against our three key analysis areas (resident population characteristics, industry activity and natural environment) is provided in tables 8, 9 and 10.



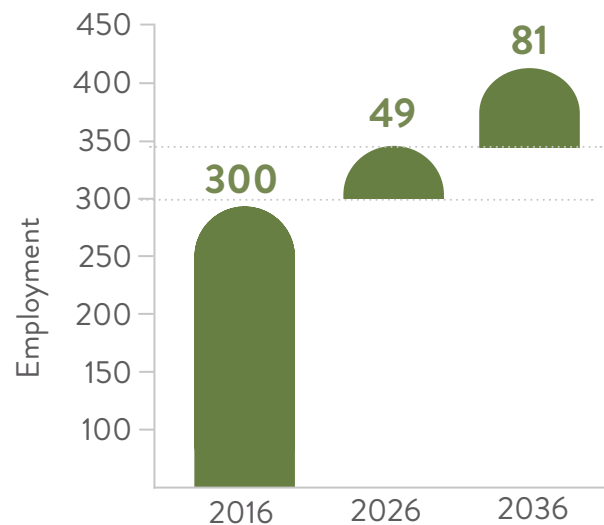
Table 7 - Shire of Murray 2036 snapshot: Diverse economy

| POPULATION | MINING | TOURISM (OVERNIGHT) | TOURISM (DAY) | AGRICULTURE | FORESTRY | NATURAL RESOURCE MANAGEMENT | ARTS AND CULTURE | RETAIL AND SERVICES | OTHER INDUSTRIES |
|---|--------------------------|---|--|---------------------------------------|---------------------------------------|---|---|--|--|
| High growth | Constant production | Moderate growth | High growth | Constant production | Constant production | High growth | High growth | Low growth | Constant production |
| 1306 (annual growth rate of 2.08% per annum). | As per table 4, page 25. | 42,000 overnight visits per annum. Increase of 30,000 overnight visitors per annum. Average overnight visitor spend \$101 (increase of \$12). | 243,000 day trips per annum (increase of 63,000 day visits per annum). Average day trip visitor spend \$63 (increase of \$9). | No additional jobs or output assumed. | No additional jobs or output assumed. | 22 direct professional, scientific & technical services jobs FTE. 8 direct public administration & safety jobs FTE. 16 education and training jobs FTE. Contributing a combined direct output of \$5.77m to the Shire of Murray. | 24 additional direct jobs providing an additional \$4.7m of direct output to the Shire of Murray. | No additional jobs or output assumed; low growth is a result of tourism expenditure within Dwellingup. | All other industries are expected to remain as constants to reflect the relatively static nature of these industries as out-lined in the Economic and Land Use Trends Analysis Report. |

Assumptions informing the descriptions of the diversified economy scenario (3) are based upon the trends and characteristics outlined in the Land Use Review, Literature Review, and Economic and Land Use Trends Analysis Report (Technical Appendix 2, 3 & 4).

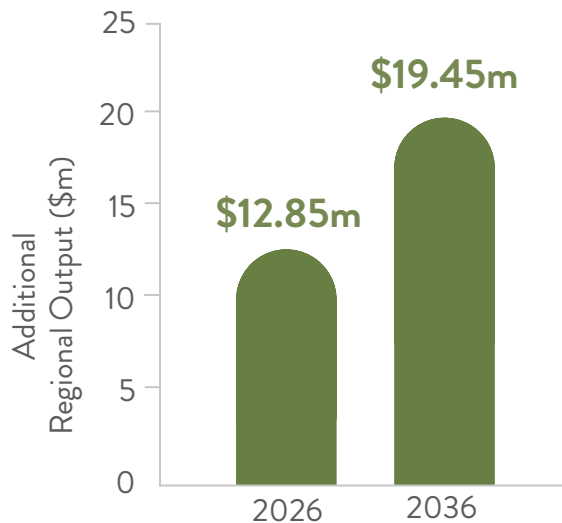
Figure 5 and Figure 6 illustrate that under a diversified economy scenario, the additional tourism activity may realise up to a further 130 jobs within Greater Dwellingup by 2036, and an extra \$19.45m of direct output to the Shire of Murray’s economy. This is largely driven by entrepreneurial activities that realise additional jobs in arts and recreation services, and accommodation and food services to cater for the additional 41,400 visitors per annum and additional jobs education, natural resource management and research activities.

Figure 5 – Additional local jobs driven by scenario 3



Source: FAR lane 2020, REMPLAN 2020

Figure 6 - Additional regional output under scenario 3



Source: FAR lane 2020, REMPLAN 2020

Table 8 - Assessment of Future Scenario 3 – Diverse economy- against vision and goals
People and place considerations

| PEOPLE AND PLACE CHARACTERISTICS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|--|
| Future demographic and age profile | Scenario 3 population projection of 1,306 residents estimates a high growth population characterised by an increased school and working age population, under which community-oriented infrastructure is likely to be feasible. | Baseline population projection presents opportunities for building a case for investment in community-oriented infrastructure. |
| Housing for current and future residents (1) | <p>Currently there is a total of 299 occupied dwellings within the study area, implying an average of 2.41 residents per household.</p> <p>Under a scenario 3 population projection, an estimated additional 242 dwellings would be required to support the population growth (assuming the residents per dwelling was to be consistent with the 2020 rate of 2.41).</p> <p>Consultation indicated the housing stock is ageing and not appealing to new families and residents. Furthermore, additional housing is subject to bushfire risks and limited service infrastructure capacity to bring new stock on to meet a gap of 242 dwellings to realise this population.</p> | <p>Under the required population projection 542 dwellings, representing a gap of 242 required to support a population of 1,306 residents by 2036.</p> <p>On this basis, an additional 242 houses would be required to realise the capacity to grow a diversified economy population through housing supply, while maintaining and enhancing the charm and character of Greater Dwellingup. Under scenario 3, there is insufficient housing supply and available land for additional residential development to support the population projection.</p> <p>Due to bushfire risk, water infrastructure and infrastructure constraints there are likely to be challenges in developing additional residential dwellings.</p> |
| Housing for current and future residents (2) | <p>Under scenario 3 there is a moderate risk in Greater Dwellingup's housing stock being utilised for accommodation and holiday house purposes. Current housing stocks in Greater Dwellingup (299 occupied dwellings) are already constrained, with limited available lands for future development.</p> <p>Demand modelling suggests potential for a total of 24 (4%) of the projected required 542 dwellings to be utilised exclusively for short stay accommodation. Assuming 2.41 residents per household, Greater Dwellingup would lose 57 residents, increasing the scenario 3 projected population in 2026 to 951 and 2036 to 1,249 residents.</p> | Under scenario 3, the growth of the tourism sector is moderately sustainable and provides the community with the opportunity to balance the demand for short stay accommodation with long term / permanent accommodation, minimising the constraints on population growth. As such, there is potential under this scenario for population growth to be accommodated locally to the extent that it underpins demand for local population services. |

| PEOPLE AND PLACE CHARACTERISTICS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|---|
| The need and importance of childcare and primary schooling within Greater Dwellingup (1) | Scenario 3 projections estimate that in Greater Dwellingup there will be 97 primary school aged children in 2026 and 168 in 2036. This implies 134 school enrolments could be realised. | <p>To support a local primary school of 100 students, a population base of 1,232 residents, or 134 children is required.</p> <p>The scenario 3 population projection suggests a population of 168 school aged children by 2036. Therefore, the population projection under a diversified economy is sufficient in supporting this service being provided locally with sufficient scale and community.</p> |
| The need and importance of childcare and primary schooling within Greater Dwellingup (2) | Scenario 3 projections estimate that in Greater Dwellingup there will be 58 children eligible for childcare in 2026, and 83 in 2036. This implies that 18 childcare placements could be demanded. | The scenario 3 population projection would therefore be sufficient to support this service being provided locally. |
| The provision of aged care and ageing in place services | <p>Scenario 3 population projection estimates Greater Dwellingup will have 104 residents over the age of 70 in 2026 and 119 over the age of 70 in 2036. This reflects an increase of 36 compared to 2020.</p> <p>Based on government aged care provision ratios, approximately 38 hours of home and community care and support should be made available per eligible recipient over the age of 70.</p> <p>Under scenario 3, approximately 4 full time direct carers would be required to service the ageing population.</p> | <p>The lack of existing aged care services does not currently enable the projected elderly population to age in place.</p> <p>To support the target population trajectory of 1,306, the demand for aged care would require up to 6 aged care workers in Dwellingup by 2036 to provide home and community care services. Despite the diversified scenario providing Greater Dwellingup with more residents than the target population, the age profile resulting from additional local induced population growth suggests the demand for aged care is likely to be 4 full time direct carers, similar to a base case scenario, where the population projection represents an ageing population profile.</p> <p>Considering Greater Dwellingup has a lack of aged care facilities and workers, significant investment would be required to support the population. A growing local workforce is likely to alleviate some of the risks to local operators.</p> |
| Access to health services | <p>There are very limited healthcare services within Greater Dwellingup.</p> <p>Under scenario 3, population estimates there could be demand for one GP for 3.59 days a week by 2026, and one GP for 4.8 days a week by 2036.</p> | <p>The projected population under scenario 3 is likely to demand one GP or remote nursing services to cater for a population of 1360.</p> <p>Under the scenario 3 there would be sufficient demand for a full time GP/remote nursing service within the Dwellingup town site.</p> |



| PEOPLE AND PLACE CHARACTERISTICS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|--|--|
| Availability of local employment opportunities | Scenario 3 estimates an additional 49 FTE jobs in Greater Dwellingup by 2026, and 81 by 2036. This provides a total of 96 jobs to the local economy by 2036. | <p>Approximately 95 local jobs need to be realised to support target residential population growth by 2036.</p> <p>Under scenario 3, there could be sufficient economic activity in supporting number of jobs required by the target population.</p> |
| The nature of local amenity (1) | <p>Greater Dwellingup's current retail floorspace is 860m².¹⁹</p> <p>Under scenario 3 population projections suggest at a high level an additional 133m² of population driven retail floorspace could be required to service a population of 1,360 residents in 2036. Therefore, the existing convenience retail offer may struggle to cater for the projected resident population.</p> | <p>It is unlikely there is sufficient vacant commercial floorspace to accommodate 133m² of additional retail within Town to accommodate the projected population^{20 & 21}.</p> |
| The nature of local amenity (2) | An additional 1,538m ² of commercial floorspace for mixed business such as hospitality, retail and healthcare services could be demanded under this scenario. | <p>The Land Use Employment Survey (technical appendix 3) suggests there is an estimated 2,350m² NLA of commercial floorspace within the study area as of 2017. Approximately 70m² (3%) is vacant.</p> <p>Under scenario 3, there is insufficient current commercial land availability to support additional activity to service projected levels of economic and population growth.</p> <p>Unlocking supply of additional commercial land will be vital in accommodating a range of business that provide amenity to a growing population. This may include development of new supply, and/or taking the opportunity to repurpose existing floorspace.</p> |

¹⁹DPLH Land Use Employment Survey 2017/18

²⁰DPLH Land Use Employment Survey 2017/18

²¹Dwellingup Structure Plan 2012

Table 9 - Assessment of Future Scenario 3 – Diverse economy- against vision and goals
Enterprise and economy considerations

| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|--|--|
| Quantifying the economic impact of tourism | <p>Under scenario 3, a diverse and sustainable tourism sector is leveraging a strong creative arts and natural resource management sector to create unique experiences for visitors. This results in an increased visitor spend in the Shire of Murray of \$31.59m per annum by 2036 and is estimated to support:</p> <ul style="list-style-type: none"> • Additional 30 FTE direct local employment. • Additional 40 FTE indirect local employment. • Additional 52 FTE jobs within the Shire of Murray • \$3.3m direct gross value added to local economy. • \$8.18m in direct output. | <p>Increased tourism visitation alone could almost provide a sufficient amount of jobs to support target population growth, providing a diverse range of bookable experiences and increasing the capture of additional visitor spend with Greater Dwellingup.</p> |
| Quantifying the economic impact of mining | <p>Under all scenarios, mining at Holyoake has the potential to continue to make significant contributions to the regional and local economy. This equates to \$717m in output, supporting approximately 4,000 jobs throughout the region by 2036.</p> <p>For Greater Dwellingup, this equates to mining potentially supporting approximately 555 jobs, or \$717m of output by 2036.</p> <p>Currently (2020) compared to mining; tourism, education and training and scientific services contribute 3.88% of Murray's regional output and 14.1% of employment compared with mining's 18.67% of output and 11.31% of employment. For these industries to have a comparable economic impact to mining in terms of regional output, they would need to generate 4,400 jobs within the region by 2036.</p> | <p>Almost 30% of all mining workers in the Shire of Murray were aged 50 years and old in June 2016. Assuming a similar demographic profile at Holyoake, 130 employees could retire by 2036. Assuming jobs remain available, this presents an opportunity for up to 130 new employees to work at Holyoake. These new employees will not necessarily become Greater Dwellingup residents, considering existing housing constraints and amenity.</p> <p>Potential conflicts with proposed Holyoake Study Area (2020-2022) will be identified and considered through a statutory assessment process that continues outside of Roadmap activities. Further information, maps and consultation will take place in due course. Alcoa will continue to work with DBCA and other stakeholders as plans develop to minimise the risk of potential land use conflicts, where practical.</p> |



| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|--|
| Quantifying the economic impact of mining (continued) | Perceived conflicts between mining and the potential for tourism, natural resource management and disease risk management need to be considered in context of the potential to provide sufficient land to realise economic activity and employment within the study area. | In relation to mining impact with other uses, Alcoa has a standard practice for ongoing community consultation. A consultation forum will likely be established in due course, with broad community engagement. At this time, previously mined areas pose the least risk for future trails. Alcoa has recently (11/6/21) responded directly to DBCA following a review of the proposed Dwellingup Town Trails Project and Dwellingup Gap Project. This review provided specific feedback on each component based on currently available bauxite knowledge. |
| Quantifying the economic impact of agriculture, forestry and fishing | <p>There is currently limited evidence of industry growth or substantial future investment focused on agriculture, forestry and fishing industries.</p> <p>Additional activity on agricultural land is likely to fall under visitor services such as accommodation and food to reflect the trend of producers providing a hospitality-based tourism attraction.</p> <p>Based on this, scenario 3 estimates the following levels of economic activity in these industries within Greater Dwellingup by 2036:</p> <ul style="list-style-type: none"> • 22 FTE direct local jobs. • \$1.89m in direct gross value added. • \$5.85m m in total output. | <p>Scenario 3 continues the trend of limited additional future investment focused on agriculture, forestry and fishing industries.</p> <p>As such, low growth in these industries may not be a significant contributor to job creation in Greater Dwellingup.</p> |
| Quantifying the economic impact of natural resource management activities | <p>Under scenario 3, a strong focus on natural resource management has brought additional local research projects tied to the Bushfire Centre of Excellence, bush regeneration, post-mine futures and mine site rehabilitation. This has resulted in new jobs in professional, scientific, technical, public administration, safety and education and training sectors. Positive flow on effects are also experienced within the visitor economy through the growth of nature, education, and Indigenous based experiences.</p> <p>Based on this, scenario 3 estimates the following high growth in these industries by 2036 that equates to:</p> <ul style="list-style-type: none"> • 26 additional direct jobs FTE. • \$3m of direct gross value added. • \$6m of additional output to the regional economy. | Natural resource management and nature-based tourism focus is likely to enhance the role that environment and culture plays in Greater Dwellingup's heritage characteristics and will be a significant contributor to population growth and job creation in Greater Dwellingup. |

Table 10 - Assessment of Future Scenario 3 – Diversified economy- against vision and goals
Environment, arts, culture and heritage considerations

| ENVIRONMENT, ARTS, CULTURE AND HERITAGE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|---|
| The value of Dwellingup's natural environment for visitation | <p>Under scenario 3, Greater Dwellingup's natural environment offer is not invested in beyond the current planned activities.</p> <p>Significant conflicts are likely to remain in multiple use State Forest areas that surround the town site, with competing demands between mining, tourism, and disease risk management areas.</p> <p>The proposed mine site at Holyoake could impact sites that could be utilised for natural resource management, including:</p> <ul style="list-style-type: none"> • Etmilyn • Plavins • Amphion Chadoora | <p>In scenario 3, Greater Dwellingup's ability to make most out of its best natural assets may potentially be compromised by a lack of investment (beyond what is currently planned) in industries and activities supporting the natural environment. This includes the potential to drive additional visitation through nature and education-based tourism experiences, as well as Indigenous tourism experiences.</p> |

It is important to note that the Environmental Protection Act (1986) continues to be the primary statutory mechanism through which issues concerning the environment will be addressed.



The diversified economy scenario represents a future where Greater Dwellingup is most likely to realise the vision set by the community, where small-town charm is maintained while self-sufficiency and sustainability are increased through the provision of community-oriented services (i.e. childcare, schooling, aged-care, health-care and dwellings for permanent residents).

This is largely due to growth in activities aligning with the vision statement, as well as a strong and diverse tourism sector that leverages opportunities to collaborate on creative arts, nature, education, and Indigenous based tourism experiences.

Growth experienced under scenario 3 provides an opportunity to mitigate the risks of the demand for short stay accommodation overwhelming local housing stocks. It also allows for more diverse food, retail, arts and hospitality offers to grow and attract different visitor segments. This suggests future projects need to be targeted towards ensuring Greater Dwellingup has the right tools to realise natural resource management and tourism could provide up to 130 additional jobs if 75% of the tourism expenditure is captured within the study area.



Photo courtesy of Josh Cowling

7. KEY FINDINGS

The following table outlines how and to what extent Scenario Three (the preferred scenario, diversified economy) aligns with the goals and key success indicators outlined on page 17 of this document. Map 4 which follows the key findings table, reflects a shared understanding between key community and industry stakeholders as to natural, heritage and community assets that will be indefinitely protected from industry impacts within the Dwellingup Future Zone.

Table 11 – Key scenario analysis findings – alignment against goals and key success indicators.

| GOAL | KEY SUCCESS INDICATOR | DIVERSE ECONOMY |
|---|---|--|
| 1. Maintain our small-town charm so that Greater Dwellingup will be an attractive, interesting place that is self-sufficient and sustainable the services it offers families. | 1.1 By 2036, Dwellingup's population has reached 1,306. | Under scenario three (diverse economy), this population growth is achievable by 2036. |
| | 1.2. By 2036, 18 additional childcare places have been created for local families. | Under scenario three (diverse economy) there will be 83 children eligible for childcare by 2036. |
| | 1.3. By 2036, there will be sufficient demand for the provision of a primary school for 100 students. | Under scenario three (diverse economy), there will be demand for a primary school to cater for Dwellingup's 168 primary school-aged children. |
| | 1.4. By 2036, the development of short stay accommodation infrastructure does not impact upon the supply rental and owner-occupier dwellings for residents. | Under scenario three (diverse economy), future planning will need to accommodate 242 new dwellings that cannot be utilised for short-stay accommodation. Bushfire risk, water infrastructure and general infrastructure constraints will need to be addressed to provide for this level of additional dwellings. |
| | 1.5. By 2036, residents have access to a full time GP and remote nursing services. | Under scenario three (diverse economy), the local population size will support a full time GP and remote nursing services for the local community. |
| | 1.6. By 2036, residents can access high quality aged care in-Dwellingup. | Under scenario three (diverse economy), six aged care workers will be required to service Dwellingup's ageing population in line with population projections, to allow people to stay and receive care in the community. |

| GOAL | KEY SUCCESS INDICATOR | DIVERSE ECONOMY |
|--|---|---|
| 2. Grow a diverse and resilient economy to offer more pathways for local jobs and career opportunities. | 2.1. By 2036, there are 130 FTE jobs within the Dwellingup economy. | Under scenario three (diverse economy), there will be sufficient economic activity across Dwellingup's industries to support the additional 96 FTE jobs required by the target population of 1,306. |
| | 2.2. By 2036, an additional 150m ² of retail floorspace and 219m ² of commercial floorspace has been identified and activated through new enterprises. | Under scenario three (diverse economy), Dwellingup will need to identify, plan for and activate commercial land availability to support additional commercial activity to service high levels of population growth which will demand an additional 150m ² retail and 219m ² commercial floor space. |
| | 2.3. By 2036, visitors are spending \$31.59m per annum in Dwellingup. | Under scenario three (diverse economy), the diversification and growth of the visitor economy allows for the potential capture of \$31.59m per annum of visitor spend in Dwellingup. |
| | 2.4 By 2036, support the creation of 5 Indigenous enterprises. | Under scenario three (diverse economy), increased visitation leads to opportunities to utilise, retain, and enhance natural assets for interpretation activities. |
| | 2.5 By 2036, Dwellingup is recognised as a cultural and arts hub with a minimum of 15 arts-based enterprises making up the Dwellingup Arts Trail. | Under scenario three (diverse economy), increased visitation, branding and place making initiatives, integrated with education activities oriented towards Dwellingup's natural and cultural heritage inspires and attracts artists through greater appreciation of Dwellingup's natural and cultural heritage. |
| 3. Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities (such as mining, forestry, tourism, agriculture and recreation). | 3.1. There is support realisation of common objectives through the implementation of the Roadmap Action Plan. | Under scenario three (diverse economy), a fit-for-purpose implementation advisory committee will be an important consultation source as industry projects are developed and implemented, and as new information on environmental assets and impacts becomes available. |
| | 3.2. There is a map that reflects a shared understanding and agreed aspiration put forward by the Dwellingup Community as to natural, heritage and community assets that they believe should be indefinitely protected from industry impacts within the Dwellingup Future Zone. | Under scenario three (diverse economy), this map will be an important consultation source as industry projects are developed and implemented, and as new information on environmental assets and impacts becomes available. |

| GOAL | KEY SUCCESS INDICATOR | DIVERSE ECONOMY |
|--|--|---|
| 4. Protect and capitalise on our assets through education, creativity, cultural awareness, and a scientific approach. | 4.1. By 2036, natural resource management and nature-based tourism activities are contributing to the local economy through an additional 26 FTE direct jobs. | Under scenario three (diverse economy) natural resource management and nature-based tourism focus is likely to enhance the role that environment and culture plays in Greater Dwellingup's heritage characteristics and will be a significant contributor to population growth and job creation in Greater Dwellingup. |
| 5. Community, Government and Industry cooperatively work together to achieve the objectives of the Dwellingup Futures Roadmap. | 5.1. A fit-for-purpose implementation advisory committee, chaired by the Shire of Murray is actively consulted and informing decision making around land use for Dwellingup's key industries | Under scenario three (diverse economy), Dwellingup will have access to a larger population and a broader range of perspectives, experience and expertise within its local community and regional stakeholders. These voices will be critical for carrying forth a vision for Dwellingup which evolves with the communities' priorities, advantages, and opportunities, whilst retaining a commitment to its values. |

Map 4 describes the following two zones that reflect the aspirations of key Dwellingup Futures Stakeholders within Greater Dwellingup:

- Dwellingup Futures Strategic Area; and
- Dwellingup Futures Investigation Area

The Dwellingup Futures Strategic Area encompasses a broad area where the majority of existing and planned community, tourism, agricultural and recreation assets are located, as well as the major entrances to the Dwellingup Townsite. The continued development and enhancement of this area in alignment with the Dwellingup Futures vision and goals is considered essential if the community's aspirations are to be realised.

The Dwellingup Futures Investigation Area represents an area where stakeholders have identified opportunities for a range of alternative land uses including natural resource management research, education and eco-tourism, as well as resource extraction, forestry and disease risk management. Clarity over the opportunities and challenges represented in this area will require further investigation, with oversight by the proposed Dwellingup Futures Implementation Advisory Committee. Initiatives that will support investigation of these areas have been identified within Part 2 - Dwellingup Futures Implementation Plan.

MAP 4: DWELLINGUP FUTURES FOCUS AREA: COMMUNITY, INDUSTRY AND ENVIRONMENT INTERACTIONS

LEGEND

- Dwellingup Futures Focus Area
- Dwellingup Futures Strategic Area
- Dwellingup Futures Investigation Area

REGION SCHEME RESERVES (PRS)

- | | |
|---|---|
| Regional open space | Industrial |
| Rural | State Forests |
| Primary regional roads | Urban |
| Special Control Area No 1 - water catchments | |

AGRICULTURAL ASSETS

- Rural Zoning

TOURISM ASSETS

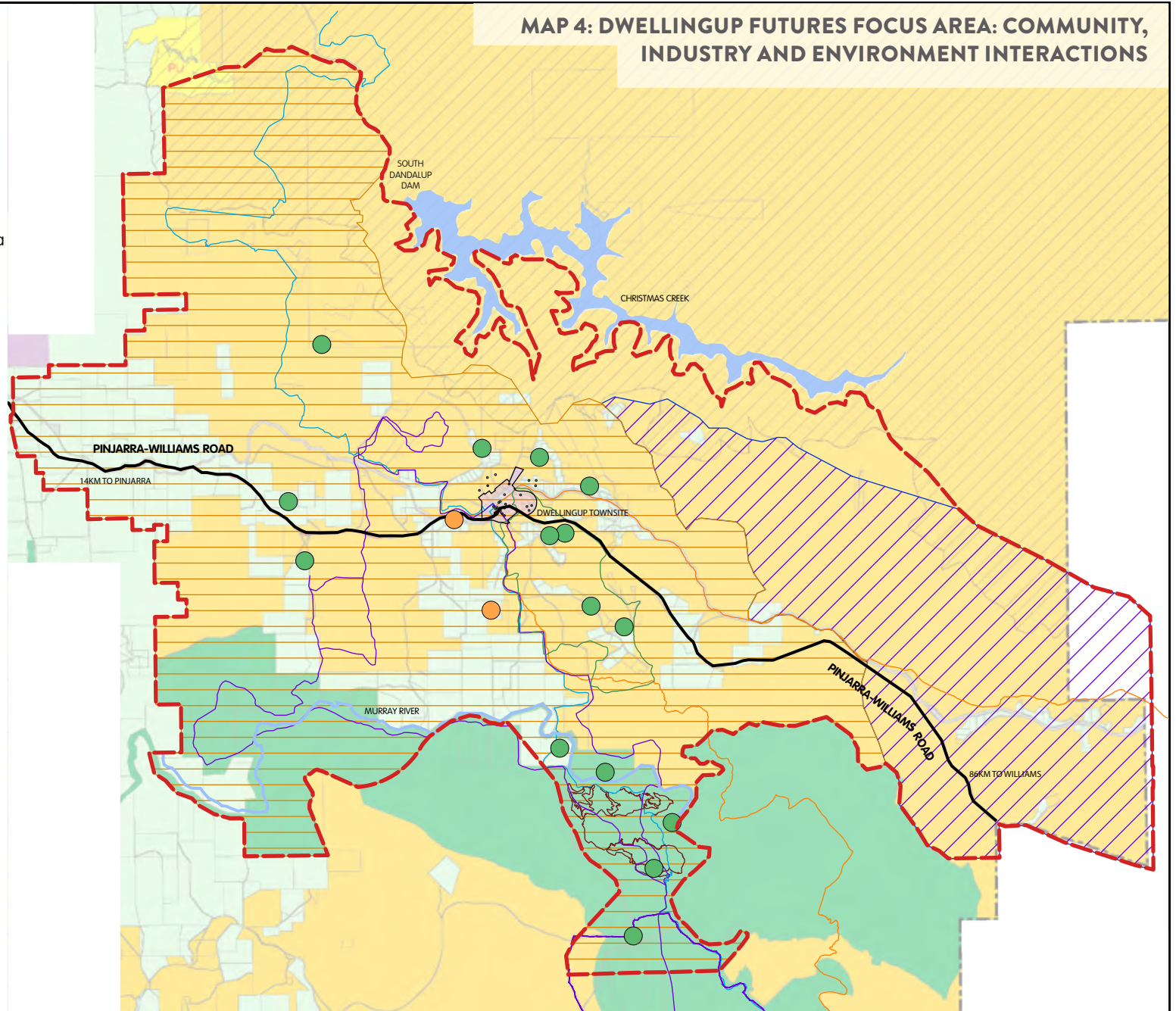
- Tourism activities and accommodation
- Food and Beverage

DPaW Managed Tracks and Trails

- Bibbulmun Track
- Munda Biddi Trail
- Walk Trail
- Mountain Bike Trails
- Les Couzens Bridle Trail

NOTES:

- ¹ Mining activities are not indefinitely precluded throughout the Dwellingup Futures Study Area, in line with MLISA
- ² Forestry activities are undertaken throughout the State Forest in the Focus Area as per existing statutory processes



JOB CODE:
MRYDRG

DRAW NO.
RD1004

REV.
A

HATCH

RobertsDay

8. GLOSSARY OF TERMS

| | |
|-----------------------------------|--|
| CVWG | Community Visioning Working Group. |
| DBCA | Department of Biodiversity, Conservation and Attractions. |
| Direct employment | Refers to the employment impacts that result directly from a particular industry or business |
| DPLH | Department of Planning Lands and Heritage. |
| Dwellingup | Dwellingup as mentioned throughout the report, refers to the ‘Greater Dwellingup’ – see technical appendix 5. |
| Dwellingup futures group | Comprised of the Stakeholder Working Group (SWG) and the Technical Advisory Committee (TAC). A full list of members of this group is available on page 7. |
| Dwellingup Town | The boundaries of the Dwellingup town site as defined by the Western Australian Planning Commission – see technical appendix 5. |
| Economic growth | Refers to the increase in the amount and value of goods and services produced. |
| Economic impact | Refers to the impact or change resulting from specific activities, that include but are not limited to economic, business, industry and environmental activities. |
| Economic Output | Is the total value of goods and services produced within a particular geographic area. |
| Employed residents | Refers to employment of residents who live within Dwellingup. |
| Employment self-containment | Refers to the proportion of employed residents who work within the area in which they live. |
| Environmental Protection Agency | The Western Australian Environmental Protection Authority (EPA) was established in 1971 as an independent Board providing advice to the Minister for Environment. |
| Environmental Protection Act 1986 | The Act provides for “the prevention, control and abatement of pollution and environmental harm, for the conservation, preservation, protection, enhancement and management of the environment and for matters incidental to or connected with the foregoing”. |
| FTE | Full time equivalent. Refers to the hours worked by an employee on a full time equivalent. |
| Goals | Broad aspirations that need to be achieved in order to meet Dwellingup’s Vision. |

| | |
|-------------------------|--|
| GP | General practitioner. |
| Greater Dwellingup | The area encompassing Dwellingup, and the activities and infrastructure in surrounding areas that may have a direct bearing on Dwellingup's economic development characteristics and/or the value proposition of the Dwellingup Town Centre. |
| Hedonic price impacts | Evaluates the benefits of non-market characteristics that may impact the market price of a particular asset. |
| Indirect employment | Refers to the employment impacts as a result of a particular industry or business that results in employment changes in other related industries. |
| Labour force | Those who are of working age (15-65), and are employed or actively seeking employment. |
| Local employment (jobs) | Refers to employment within Dwellingup, regardless of where to employee resides. |
| NRM | Natural resource management. The protection and improvement of natural resources, including land, water, plants, and animals. |
| NDIS | National Disability Insurance Scheme. |
| NLA | Net lettable area. |
| PDC | Peel Development Commission. |
| Scenario | Refers to a specific possibility, in reference to plausible futures for Dwellingup. |
| Shire of Murray | The municipal boundaries of the economy that services, and benefits from economic activities in Dwellingup and surrounds. |
| Social amenities | Refers to places, infrastructure and services that support the wellbeing of a particular community. |
| Statistical Study Area | Boundaries for major ABS data sets that provide the most accurate snapshot of economic development activities and trends. |
| Strategic Priorities | Specific outcomes that need to be realised to support attainment of goals. |
| SWG | Stakeholder Working Group related to the Dwellingup Futures Project. |
| TAC | Technical Advisory Committee related to the Dwellingup Futures Project. |
| Target population | Refers to population estimated to be necessary to support the sustainable provision of essential services in Dwellingup. |
| Value added | A quantitative measure of how productive or efficient and industry is at increasing the value of its inputs. |
| Vision Statement | An overarching statement as to what will characterise future growth in Dwellingup. |



9. TECHNICAL APPENDICES LIST

| NUMBER | TITLE | AUTHOR | DATE OF PUBLICATION |
|-----------------------|--|---|---------------------|
| Technical Appendix 1 | Detailed Scenario Analysis | FAR Lane | February 2020 |
| Technical Appendix 2 | Dwellingup Land Use Review | Hatch Roberts Day | February 2020 |
| Technical Appendix 3 | Literature Review – Dwellingup Futures Growth Management Roadmap | FAR Lane and Hatch Roberts Day | February 2020 |
| Technical Appendix 4 | Draft Dwellingup Futures Economic and Land Use Trends Analysis | FAR Lane and Hatch Roberts Day | July 2020 |
| Technical Appendix 5 | Scenario Impact Modelling Methodology | FAR Lane | November 2020 |
| Technical Appendix 6 | Study Areas and Maps | FAR Lane | November 2020 |
| Technical Appendix 7 | Alcoa of Australia Ltd Fact Sheet | Alcoa of Australia Ltd | June 2020 |
| Technical Appendix 8 | Dwellingup Discovery Forest – Zones and their key values. Map supplied by | Dwellingup Discovery Forest Working Group | August 2020 |
| Technical Appendix 9 | The Department of Planning Lands and Heritage Land Use Employment Survey Extract | Department of Planning, Lands and Heritage, extract formatted by FAR Lane | 2017 |
| Technical Appendix 10 | Map - Alcoa's Mineral Lease – Mineral Lease 1 State Agreement (ML1SA) | Hatch Roberts Day, Alcoa of Australia Ltd | June 2021 |

Appendices have been provided as a separate report, and can be accessed via the Shire of Murray's Your Say Portal on the Shire of Murray website www.murray.wa.gov.au.







DWELLINGUP FUTURES ROADMAP **2021-2036** AND BEYOND

PART II – IMPLEMENTATION PATHWAY



DWELLINGUP
where trails meet

WILD @ HEART



TABLE OF CONTENTS

| | |
|--|----|
| 1. INTRODUCTION | 3 |
| 2. IMPLEMENTATION PRINCIPLES..... | 4 |
| 3. DWELLINGUP'S PRIORITY PROGRAMS | 5 |
| 4. DWELLINGUP FUTURES IMPLEMENTATION ADVISORY COMMITTEE | 9 |
| 5. PROJECT RESOURCING | 10 |
| 6. ROADMAP ACTION PLAN | 11 |

Part II of the “Dwellingup Futures Roadmap 2021-2036 and beyond” has been prepared by FAR Lane and Hatch Roberts Day on behalf of the Shire of Murray, Peel Development Commission and the Dwellingup Futures Group. This report accompanies the “Dwellingup Futures Roadmap 2021- 2026 and beyond: Part I”.

The Shire of Murray acknowledges Dwellingup’s traditional custodians, the Bindjareb People of the Noongar Nation, their continuing connection to the land, waters and community and pay our respects to their Elders both past and present.



1. INTRODUCTION

The final (fifth) goal set by the Community Stakeholder Working Group as part of the Dwellingup Futures Roadmap visioning process is:

“The community, government and industry cooperatively work together to achieve the goals of the Dwellingup Futures Roadmap.”

The implementation pathway outlined in this report describes how this goal will be realised.

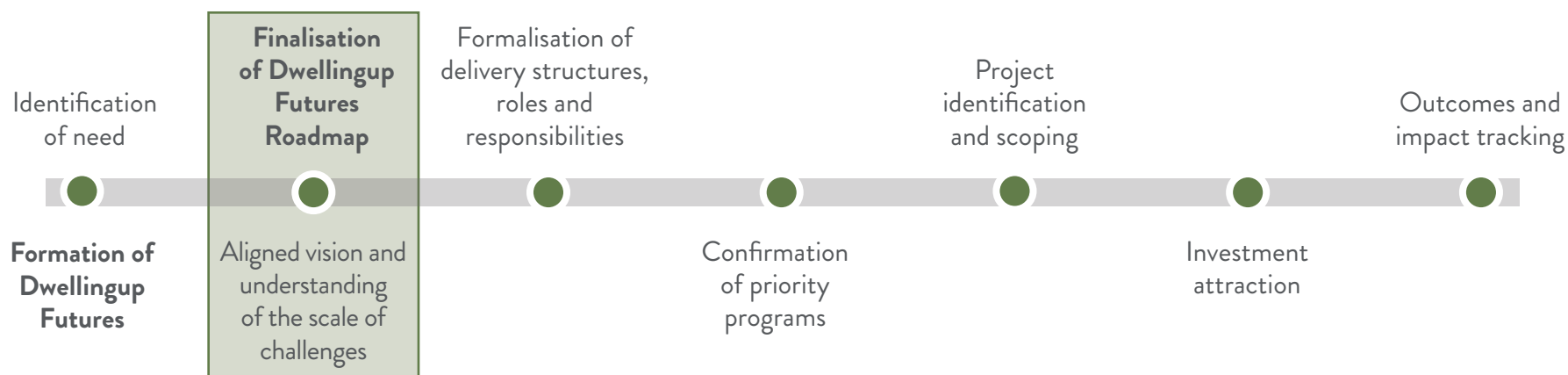
Figure 1 outlines the potential pathway that Part II of the Roadmap seeks to support, and describes a process that assumes:

- The Shire of Murray and Peel Development Commission will be the key coordinating bodies through which the programs identified through this pathway are delivered; and

- The Shire of Murray will be supported through the formalisation of Dwellingup Futures governance structures including:

- The establishment of a fit-for-purpose governance structure (chaired by the Shire of Murray) that advocates for and represents the community’s vision and strategic goals into the future; and
- Continuation engagement with Technical Advisory Committee (TAC) members on an as-needs basis to provide domain expertise that supports initiatives and provides linkages into networks required to address identified strategic challenges.





Figure 1 – Proposed Dwellingup Futures Roadmap Implementation Pathway Process





2. IMPLEMENTATION PRINCIPLES

The Dwellingup Futures Group will be guided in decision making and the assessment of any potential projects by the following four core principles, which seek to ensure maximum benefit for the Greater Dwellingup community and economy.

-  **Alignment** – Programs and projects will align with the aspirations of Dwellingup Futures, as expressed through the Roadmap’s vision and goals.
-  **Community priority** - Programs and projects will align with community priorities including identified the Roadmap’s vision, goals and strategic priorities.
-  **Deliverability** - Programs and projects will be practical, and achievable.
-  **Momentum** – Programs and projects will mutually support each other to support realisation of the Roadmap’s vision and goals.



3. DWELLINGUP'S PRIORITY PROGRAMS

The following key priority programs have been identified as critical to the realisation of the aspirations identified in the Roadmap.

Program 1: People and place.

Program 2: Enterprise and economy.

Program 3: Environment, arts, culture, and heritage.



**PROGRAM 1:
PEOPLE AND
PLACE**

**PROGRAM 2:
ENTERPRISE AND
ECONOMY**

**PROGRAM 3:
ENVIRONMENT,
ARTS, CULTURE AND
HERITAGE**

1. PEOPLE AND PLACE

Key action areas, goals and outcomes that will contribute to developing people and place.

| PROGRAM | ACTION AREA | INTENT |
|------------------|------------------------|---|
| PEOPLE AND PLACE | MASTERPLANNING | Develop a shared understanding of the spatial characteristics, opportunities, constraints of Dwellingup and surrounds to ensure that future growth and investment can be accommodated in a manner that aligns to the Roadmap's goals, and that protects and enhances the character of Greater Dwellingup. |
| | SERVICING GROWTH | Ensure that infrastructure services are fit-for purpose for the growth and evolution of Greater Dwellingup. |
| | WHOLE-OF-LIFE-SERVICES | Ensure that there are the required local services to retain and attract a diverse resident population to live a high- quality life in Greater Dwellingup. |

2. ENTERPRISE AND ECONOMY

Key action areas, goals and outcomes that will contribute to developing a resilient and prosperous economy.

| PROGRAM | ACTION AREA | INTENT |
|------------------------|---|---|
| ENTERPRISE AND ECONOMY | PROTECT AND ENHANCE KEY ECONOMIC ASSETS | Strengthen connections between activities happening in and around Greater Dwellingup, and local enterprises and employees. |
| | CELEBRATE THE TOWN CENTRE | Enhance the sense of place and commercial vibrance of Greater Dwellingup's commercial heart. |
| | EXPANDING TOURISM SERVICES | Strengthen the value proposition for tourism visitors to stay in Greater Dwellingup and invest in one more experience, one more meal, one more artwork and/or one more night. |
| | CONTINUE TO BUILD DWELLINGUP'S TOURISM IDENTITY | Leverage collective activities to build greater awareness of Dwellingup in local, regional, state, national and international tourism marketplaces. |
| | LEVERAGE NRM CAPABILITIES | Build stronger linkages between existing and emerging markets and the history, knowledge and assets of Greater Dwellingup's natural resource management capability. |
| | MANAGING INDUSTRY CONFLICTS | Proactively identify and resolve challenges associated with conflicting commercial activities that create negative externalities and/or risk to enterprise. |
| | ENTERPRISE ATTRACTION, DEVELOPMENT AND SUPPORT | Develop the value proposition of Greater Dwellingup as a place to establish and grow a business. |

3. ENVIRONMENT, ARTS, CULTURE AND HERITAGE

Key action areas, goals and outcomes that will contribute to fostering environment, arts, culture and heritage.

| PROGRAM | ACTION AREA | INTENT |
|---|--|---|
| ENVIRONMENT, HERITAGE AND CULTURE | PROTECT VULNERABLE NATURAL HERITAGE | Identify, understand, and protect vulnerable natural heritage from human impacts resulting from local activities, and broader human induced changes to the climate. |
| | CELEBRATE AND LEVERAGE DWELLINGUP'S HERITAGE | Foster a greater shared understanding of Greater Dwellingup's Indigenous and Western heritage. |
| | FOSTER ARTS AND CULTURE | Continue to develop Greater Dwellingup's burgeoning culture and arts sector as a key driver for local amenity, visitation, and local expenditure capture. |





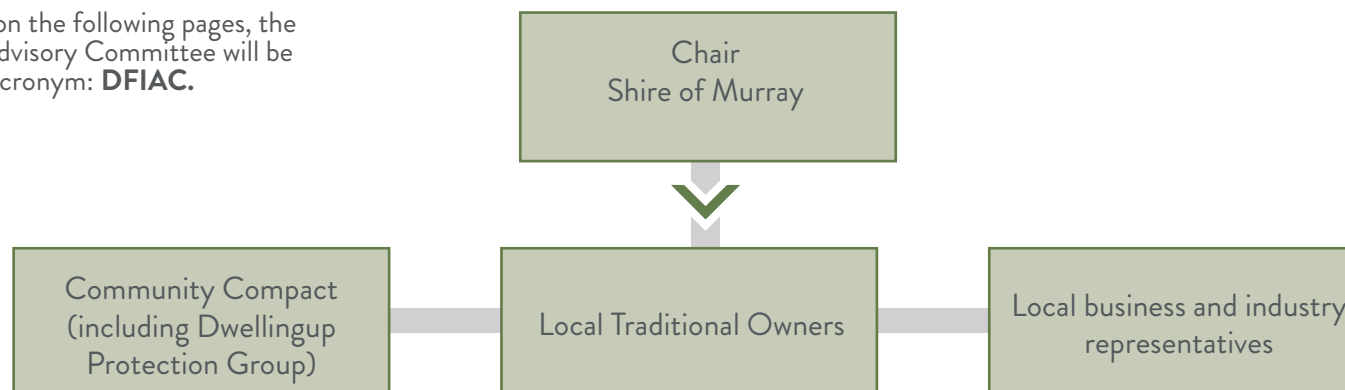
4. DWELLINGUP FUTURES IMPLEMENTATION ADVISORY COMMITTEE

A key outcome of the Dwellingup Futures Roadmap process is the establishment of the Dwellingup Futures Implementation Advisory Committee (DFIAC). This committee's mandate will be to:

- Advocate for and represent the community's vision and strategic goals into the future;
- Contribute to planning and statutory processes (for example, the EPA process), referencing the Roadmap as an indication of the community's aspirations and concerns; and
- Support the identification of opportunities between industry, the Dwellingup environment, and the Dwellingup community that align with the Dwellingup Futures vision.

The Implementation Advisory Committee will be chaired by the Shire of Murray with a membership comprising of local community groups, local Traditional Owners, local business representatives, and local industry representatives.

In the action plan on the following pages, the Implementation Advisory Committee will be referred to by its acronym: **DFIAC**.





5. PROJECT RESOURCING

Potential resourcing has been categorised for each program element considered in the Action Plan. Sources of the financial support required for each project have been classified into one of the following categories:

- Existing Shire of Murray activities;
- Existing State Government agency activities;
- Local business and community capital;¹
- Resource industry community development funds;
- State and federal government community development funds;²
- State and federal government industry development funds;³
- State and federal infrastructure funds; and
- Private capital markets.

Whilst elements of many of the proposed projects fall into the core business of the Shire of Murray and State agencies, the Dwellingup Futures Roadmap represents an opportunity to leverage these activities to attract substantial investment from other public and private capital markets.

¹ Lotterywest ongoing and COVID-19 relief grants.

² Federal Government Building Better Regions Funds.

³ Federal Entrepreneur Grants, State REDS and Regional New Innovation Fund, Innovation Vouchers, Federal Government Entrepreneurs Programme Growth Grants.





6. ROADMAP ACTION PLAN

1. PEOPLE AND PLACE – DETAILED ACTION PLAN

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | KEY PERFORMANCE INDICATOR | TIMEFRAME | POTENTIAL PARTNERS | RESOURCING |
|------------------------|--|--|-----------------------------------|--------------|---|---|
| MASTERPLANNING | Develop Dwellingup Precinct Structure Plan. | Review the Dwellingup Structure Plan and update as a Precinct Structure Plan to ensure the vision, goals, and recommendations of Dwellingup Futures are considered and addressed. | All | Underway | Shire of Murray, DPLH / WAPC, Dwellingup Futures Implementation Advisory Committee (DFIAC) | Existing Shire of Murray activities |
| | Design guidelines that support the retention of Dwellingup's small-town charm. | Develop design guidelines for future residential and commercial development, reflecting the Dwellingup community's stated desire for small-town charm to be retained. | 1.4, 2.2 | Underway | Shire of Murray, DPLH / WAPC | Existing Shire of Murray activities |
| SERVICING GROWTH | Understand and clarify bushfire parameters for future growth. | Utilise the Dwellingup Precinct Structure Plan review to consider the implications of the Roadmap, and identify potential solutions to contemporary bushfire rules/regulations that may limit Dwellingup's ability to accommodate target populations, visitors, and industries. | 1.1, 1.4, 2.2, 2.3, 3.1, 3.2, 5.1 | Underway | Shire of Murray, DPLH / WAPC, DBCA, DFIAC | Existing Shire of Murray activities |
| | Develop residential housing to service target population growth. | Utilise the Dwellingup Structure Plan review and Activity Centre Plan to identify opportunities for development of new residential housing supply appropriate for attraction of an additional 200 families to Dwellingup. | 1.1, 1.4 | 4 - 10 years | Shire of Murray, DPLH / WAPC | Existing Shire of Murray activities |
| | Build capacity for mixed-business industry. | Utilise the Dwellingup Precinct Structure Plan project to identify and de risk development of a preferred location for a mixed business precinct that contains a minimum of 570m ² NLA of total additional or re-zoned mixed business floorspace. | 2.2 | Underway | Shire of Murray, DPLH / WAPC | Existing Shire of Murray activities |
| | Marrinup Golf Course/Carriage Club Utilisation Plan | Work with the Dwellingup Carriage Club to support realisation of the old Dwellingup Golf Course as a dedicated events facility that may include dedicated events infrastructure, short-stay accommodation, and expanded trails infrastructure. Key issues to resolve include certainty of tenure for the Carriage Club, certainty over future mining impacts in proximity to the asset and adequacy of services such as power, water and wastewater. | 2.2, 2.3, 4.1 | 4-10 years | Dwellingup Carriage Club, DBCA, Shire of Murray, recreation stakeholders and event organisers | Resource industry community development funds |
| | Review requirements on casual short-stay accommodation. | Review the need / desirability of local planning, limiting the ability of residential housing rentals in Dwellingup to be utilised for casual short-stay accommodation. | 1.4 | 1 – 3 years | Shire of Murray | Existing Shire of Murray activities |
| | Prioritise infrastructure planning, advocacy and business case development. | Utilise the Dwellingup Structure Plan and Activity Centre Plan to assess and quantify the required potable water, wastewater, energy, and telecommunications infrastructure required to service 242 additional dwellings for residents, at least 15 additional businesses and at least 42,000 annual additional overnight visitors. | 1.1, 1.4, 3.3 | Underway | Shire of Murray, Infrastructure Agencies, InfrastructureWA, DFIAC | Existing Shire of Murray activities |
| WHOLE-OF-LIFE-SERVICES | Complete recreation precinct. | Complete the vision and delivery of a dedicated all-ages recreation precinct for Dwellingup residents and visitors. | 2.3, 3.1 | Underway | Shire of Murray | Existing Shire of Murray activities |

2. ENTERPRISE AND ECONOMY – DETAILED ACTION PLAN

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | KEY PERFORMANCE INDICATOR | TIMEFRAME | POTENTIAL PARTNERS | PRIMARY RESOURCING SOURCE |
|--|--|--|-----------------------------------|--------------|--|---|
| PROTECT AND ENHANCE KEY ECONOMIC ASSETS | Utilise the Dwellingup Futures Implementation Advisory Committee (DFIAC) to negotiate an agreed management plan over key strategic economic assets. | Utilise the DFIAC, to negotiate a management plan over key economic assets identified in the Roadmap that potentially warrant dedicated planning, investment and protection from future mining activities. These assets include but are not limited to: | 2.1, 2.2, 2.3, 3.1, 3.2, 4.1, 5.1 | 1 – 3 years | DFIAC | DFIAC activities |
| | | Major mountain biking and hiking trails; | | | | |
| | | Major DBCA camping assets; | | | | |
| | | High quality agricultural lands with strong potential for tourism and differentiated food-related development; | | | | |
| | | Areas with potential for dedicated short-stay accommodation development; and | | | | |
| | | Major education camps and assets. | | | | |
| CELEBRATE THE TOWN CENTRE | Enhance commercial precinct in Dwellingup Town Centre. | Utilise wayfinding techniques and principles to provide visitors with a strong sense of arrival within the Dwellingup Town Centre (e.g. signage, painted/ coloured asphalt). | 2.2, 2.3, 2.4, 2.5, 5.1 | 1 – 3 years | Shire of Murray, DFIAC | New Shire of Murray activities |
| | Activate commercial precinct lane ways within the Dwellingup Town Centre. | Utilise Dwellingup Activity Centre plan to identify opportunities to activate lane ways within a designated commercial precinct. | 2.2, 2.3, 2.4, 2.5, 5.1 | 4 – 10 years | Shire of Murray, Consultant planner | New Shire of Murray activities |
| EXPANDING TOURISM SERVICES | Identify opportunities for dedicated short-stay accommodation developments in and around Dwellingup to deliver up to an estimated additional 115 overnight visitors. | Utilise Dwellingup Activity Centre plan to identify and de-risk opportunities to develop dedicated short-stay accommodation that does not compete with housing/rental markets within Dwellingup. Consideration should include: | 2.3, 3.1, 4.1 | 1 – 3 years | Shire of Murray, DPLH / WAPC, DBCA, Consultant planner, DFIAC | New Shire of Murray activities |
| | | Expansion of offer at the Forrest Heritage Centre; | | | | |
| | | Provision of offer at Dwellingup Carriage Club; | | | | |
| | | Provision of offer at Icy Creek; | | | | |
| | | Re purposing of degraded rehabilitation areas; and | | | | |
| | | Allowance of complementary accommodation offer on agricultural tourism assets. | | | | |
| | Pinjarra/Mandurah/ Dwellingup tourist shuttle. | Promote and actively support the Pinjarra/ Mandurah/ Dwellingup shuttle currently being piloted by commercial operator. | 2.3 | Underway | Shire of Murray, Commercial operators | Local business and community investment |
| | Dwellingup Gap Trails Project | Implement the Dwellingup Gap Trails Project that facilitates stronger linkages between major trail heads and Dwellingup Town, and ensures the completion of a number of visitor and community oriented recreation and tourism assets. Refer to WA Labour Plan for Murray . | 2.3, 3.1, 4.1 | 1 – 3 years | Shire of Murray, Peel Development Commission, DBCA, DFIAC, DPIRD | DFIAC activities |
| | Camping/campsite servicing. | Promote opportunities for enterprises to support existing and growing camping markets with campsite services including gear hire, food delivery, etc. | 2.3, 3.1, 4.1 | 1 – 3 years | Shire of Murray, Peel Development Commission, DBCA, Local commercial operators | Local business and community investment |

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | KEY PERFORMANCE INDICATOR | TIMEFRAME | POTENTIAL PARTNERS | PRIMARY RESOURCING SOURCE |
|---|---|--|---------------------------|--------------|--|---|
| CONTINUE TO BUILD DWELLINGUP'S TOURISM IDENTITY | Achieve accreditation of Dwellingup as an International Trails Town. | Leverage continued trail development (as advocated for in Gap Project), as the basis for recognition and promotion of Dwellingup as a recognised International Trail Town. | 2.3, 2.4, 3.1, 3.2, 4.1 | 4 - 10 years | Shire of Murray, Peel Development Commission, DBCA, Tourism WA | Dwellingup Futures Group activities |
| | Support collective branding and promotion. | Support development of a local tourism industry collective that can take ownership of future branding, promotion and booking services. | 2.3, 2.4, 3.1, 3.2, 4.1 | 4 - 10 years | Shire of Murray, DBCA, DFIAC | Local business and community investment |
| | Develop and contribute to a systemic approach to researching and planning for post-mine/forestry futures. | Seek to consult on mine closure plans with the State to utilise current investment in, and support for, the Cooperative Research Centre in post-mine futures (CRC-TIME) to develop a systemic approach to targeted data collection, benchmarking, analysis and planning for post mine/ Forestry futures. | 3.1, 3.2, 5.1 | 4 - 10 years | DFIAC, Shire of Murray, Peel Development Commission, DBCA, JTSI | DFIAC activities |
| ENTERPRISE ATTRACTION, DEVELOPMENT AND SUPPORT | Encourage dedicated 'pop-up' infrastructure in the town centre. | Support SMEs to trial new businesses during peak times through encouragement of 'pop up' offerings that do not detract from existing operations. | 2.2, 2.3, 4.1 | 4 - 10 years | Shire of Murray, DFIAC | New Shire of Murray activities |
| | Support Indigenous businesses. | Work to support the development and growth of targeted Bindjareb Noongar enterprises operating in Dwellingup through targeted enterprise support and linkages into local, state, national and private entrepreneur support initiatives. | 2.3, 4.1 | 1 - 3 years | Shire of Murray, Peel Development Commission, Alcoa Australia | Existing Shire of Murray activities |
| | Support Hotham Valley Rail. | Work with Hotham Valley Rail to support continuation of the enhancement of branding, communications and products, and to advocate for investment in key infrastructure focusing on the linkage between Pinjarra and Dwellingup and platform realignment and upgrades. | 2.3, 4.1 | 1 - 3 years | Shire of Murray, Peel Development Commission | Existing Shire of Murray activities |
| | WA Food Innovation Fund. | Utilise Regional food innovation support initiatives to provide local projects with opportunities to identify and de-risk high growth activities. | 2.1, 2.2, 2.3, 4.1, | 4 - 10 years | Shire of Murray, Peel Development Commission, DPIRD, local producers | Existing Shire of Murray activities |
| INVESTMENT ATTRACTION | Develop Dwellingup-oriented investment pitches for State and Federal Government investment in projects that support the realisation of the Dwellingup Futures vision and goals. | Work to profile, prioritise and collectively advocate for investment key Dwellingup priority projects that may include but not be limited to: | All | 4 - 10 years | DFIAC, Shire of Murray, Peel Development Commission | DFIAC activities |
| | | Utilisation of crown reserves for short stay accommodation solutions (potential to be investigated in Precinct Structure Plan); | | | | |
| | | Upgrading of enabling service infrastructure to requirements as identified in the Precinct Structure Plan.; | | | | |
| | | Investment in targeted social infrastructure and services to requirements as identified in the Precinct Structure Plan and other activities; | | | | |
| | | Utilisation of under-utilised community assets (e.g. old visitors centre); and | | | | |
| | | Development of key infrastructure that enhances the comparative value proposition of target industries. | | | | |
| | Improve telecommunications | Identify ICT improvements across the Dwellingup area (eg, mobile phone coverage, Dwellingup townsite public wifi zone opened on days to coincide with events), develop business case for upgrades, lock in funding pathways and delivery schedules. | 1.1, 2.3, 4.1 | 1 - 3 years | Shire of Murray, Peel Development Commission | Shire of Murray activities |

3. ENVIRONMENT, ARTS, CULTURE AND HERITAGE – DETAILED ACTION PLAN

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS | KEY PERFORMANCE INDICATOR | TIMEFRAME | POTENTIAL PARTNERS | PRIMARY RESOURCING SOURCE |
|--|---|---|---------------------------|--------------|--|---|
| PROTECT VULNERABLE NATURAL HERITAGE | Pursue determination of DPG's public nomination of Old Growth Forest. | Pursue efficient determination of the Dwellingup Protection Group's application for classification of old growth Forest within their nominated 'Murray Basin Protected Zone' to provide further clarity on the potential ecological values of this parcel. | 3.1, 3.2, 4.1, 5.1 | Underway | DFIAC | DFIAC activities |
| | Utilise the proposed fit-for-purpose Governance Structure to arrive at a shared position on the environmental heritage assets contained within and adjacent to DDF #4 and #5. | Utilise the proposed Governance Structure to capture insights from ongoing Alcoa EPA and pre-approval processes, Dwellingup Protection Group knowledge base and activities, DBCA knowledge and activities, and further research to support Dwellingup Futures SWG to inform a shared understanding of the environmental heritage characteristics and potential trade-offs between mining and natural heritage retention in relation to: Dwellingup Protection Group's proposed Dwellingup Discovery Forest #4 (Drinking Water Protection Zone) and #5 (Murray Basin Wilderness Zone);and Potential impacts on adjacent areas including DDF # 3 (Wildfire Protection Zone), #6 (Timber Towns Heritage Zone), and private residences. | 3.1, 3.2, 4.1, 5.1 | 1 – 3 years | DFIAC | DFIAC activities |
| | Monitor impacts of climate change on Forest. | Advocate for expanded resourcing to adequately monitor, evaluate, intervene and mitigate against impacts of climate change on northern Jarrah Forest ecosystems. | 4.1, 5.1 | 4 - 10 years | DFIAC | Existing State Government agency activities |
| | Expand Indigenous culture and heritage celebration and interpretation. | Work with local traditional owners and Indigenous owned enterprises to expand local interpretation services and products for tourism and education markets. Consideration may include but not be limited to: Support for development of a dedicated bush tucker trail; and Interpretation of the cultural significance of key sites and places. | 2.3, 2.4, 2.5, 4.1 | 4 - 10 years | Traditional Owners, local Indigenous entrepreneurs, DBCA, Shire of Murray | Local business and community investment |
| CELEBRATE AND LEVERAGE DWELLINGUP'S HERITAGE | Envisage future of mills and interpretation of sites. | Work with Forest Products Commission on community support programs to support the community's aspirations around preserving forest heritage. | 2.3, 2.4, 2.5, 4.1 | 4 - 10 years | Forest Products Commission, Shire of Murray, DFIAC | New State Government agency activities |
| | Expand education programs through the Forest Discovery Centre. | Support the utilisation of existing assets at the Forest Discovery Centre to expand local experiential education offerings to students in relation to interpretation of the natural environment, Indigenous heritage, and Western heritage. | 1.3, 4.1 | 4 – 10 years | Forest Discovery Centre, Shire of Murray DBCA, Local service providers, Traditional Owners | Local business and community investment |
| | Leverage Icy Creek asset for environmental interpretation as a complement to adventure tourism offer. | Revamp the mothballed Icy Creek education asset to provide interpretation opportunities for student utilising private school camps, Nanga Bush Camp and potential campsite facilities at Icy Creek. | 2.3, 4.1 | 4 – 10 years | DBCA, potential commercial/ community operators | Local business and community investment |
| | Dwellingup Arts Trail. | Support the development of a dedicated culture and arts trail through greater Dwellingup that celebrates the creativity and innovation of Dwellingup residents and enterprises. | 2.3, 2.4, 2.5, 4.1 | 1 - 3 years | Shire of Murray, Local creative enter-prises, DFIAC | New Shire of Murray activities |
| FOSTER ARTS AND CULTURE | Artist in residence program. | Provide continued support for artist in residence programs within local galleries to attract State, National and Internationally significant artists to celebrate the natural heritage of Dwellingup and engage with the Dwellingup creative community. | 2.3, 2.4, 2.5, 4.1 | 4 - 10 years | Shire of Murray, Local creative enter-prises, DFIAC | New Shire of Murray activities |



FUTURE FOCUS: POTENTIAL ACTIONS

| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS |
|--|---|---|
| FOSTER ARTS AND CULTURE | Dwellingup Arts Hub. | Build on existing and developing arts projects and collectives to establish a Dwellingup Arts Hub that supports and connects local and regional artists and provides space for art creation, showcasing and events. |
| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS |
| EXPANDING TOURISM SERVICES | Trail rider/hiker shuttles. | Facilitate local development and expansion of trail shuttle services between Dwellingup and trail heads. |
| CONTINUE TO BUILD DWELLINGUP'S IDENTITY | Advocate for regional NRM R&D infrastructure. | Advocate for regional NRM R&D infrastructure. Work collectively to build the case for Dwellingup to be a centre of excellence in the management of vulnerable ecosystems in a changing climate, bushfire management and threat mitigation, and mine site rehabilitation. |
| | Consideration of alternative uses for degraded rehabilitation areas. | In line with Alcoa Australia's rehabilitation standards and obligations, advocate for highest and best uses for degraded rehabilitation areas with consideration for uses in line with Dwellingup Future's vision including but not limited to corrective rehabilitation, active recreation, short stay accommodation, and production of bush foods / bush tucker products and experiences. |
| ENTERPRISE ATTRACTION, DEVELOPMENT AND SUPPORT | Business capability support. | Provide ongoing support to new SMEs to undertake the strategic and operational planning required to be successful in Dwellingup. |
| | E-commerce. | Work to support existing Dwellingup SMEs to build a professional and effective online presence that facilitates e-commerce and promotes Dwellingup. |
| | Identify and support new entrepreneurs. | Actively identify, encourage, inspire and support new entrepreneurs seeking to realise their ambitions in Dwellingup. This must include recognition of the failure rate of first-time enterprises and encouragement to persist and iterate with business ideas. |
| | Implement local procurement strategy - industry and government. | Promote, educate and encourage the utilisation of the local and regional procurement policies of the Shire of Murray, Western Australian State Government and Alcoa to local Dwellingup enterprises. |
| | Business capability support. | Provide ongoing support to new SMEs to undertake the strategic and operational planning required to be successful in Dwellingup. |
| | Provide support for public liability insurance for enterprises impacted by changes in bushfire risk assessment. | Actively engage with key SME's and community organisations to understand their changing insurance risk profiles, and availability of key insurances (including public liability insurance). Where issues exist, work with parties such as DBCA (who may act as landlords for assets) to identify potential solutions. |
| INVESTMENT ATTRACTION | Support the "Invest Peel" chaperone service. | Actively identify and promote linkages between active investors or capital providers and Dwellingup investment opportunities. |
| | De-risk development of boutique agriculture products. | Ensure that statutory processes do not unduly hinder development of tourism/ produce/ value added products that utilise and enhance existing agriculture assets. |
| KEY ELEMENT | PROJECT | DESCRIPTION/ELEMENTS |
| SERVICING GROWTH | Dwellingup Airport Utilisation Plan. | Engage with regional activities, in particular those based out of Peel Business Park, Murrayfield Airpark and Bushfire Centre of Excellence to capture local opportunities for Dwellingup airfield. Promote day-trip services to Dwellingup via light plane/helicopter services to service operators, including upgrading of Banksiadale Road for improved access into town. Liaise with emergency services to ensure sufficient infrastructure is in place to enable medevac/evacuations under a range of plausible emergency scenarios. Note: DBCA asset maintained by DCBA for it's fire management and aerial baiting requirements, it's currently only maintained to a standard suitable for these operations and not public use. Maintenance and liability are the key issues that require resolution before broader use of the airstrip. |
| | Marrinup Nursery Utilisation Plan. | Alcoa and potential proponents to develop a utilisation plan for Marrinup that supports the vision and goals of the Roadmap. This may include light-industrial services, BRM extraction for local and regional development, and/or short-stay accommodation services. Alcoa Australia note that any use of the Nursery is currently subject to short term use. |
| WHOLE-OF-LIFE-SERVICES | Facilitate ageing in place services. | Actively track the availability of home and community care services available to the growing cohort of ageing residents in Dwellingup. With estimated demand for Home and Community Care (HACC) services to support up to 6 households by 2036, plan for advocacy for the provision of suitable aged care provision models. |
| | Develop healthcare precinct (GP and allied health). | Utilise the Dwellingup Activity Centre Plan to identify a preferred location to accommodate a current need for 1 health care service consulting room to accommodate, with the capacity to grow to 2 health care service consulting rooms in the future. |





DWELLINGUP FUTURES ROADMAP **2021-2036** AND BEYOND

**PART I – ECONOMIC DEVELOPMENT
SCENARIO ASSESSMENT**

APPENDICES (DRAFT 3.0)



DWELLINGUP

where trails meet

WILD@HEART



TECHNICAL APPENDICES LIST

| NUMBER | TITLE | AUTHOR | DATE OF PUBLICATION |
|-----------------------|--|---|---------------------|
| Technical Appendix 1 | Detailed Scenario Analysis | FAR Lane | February 2020 |
| Technical Appendix 2 | Dwellingup Land Use Review | Roberts Day | February 2020 |
| Technical Appendix 3 | Literature Review – Dwellingup Futures Growth Management Roadmap | FAR Lane and Roberts Day | February 2020 |
| Technical Appendix 4 | Draft Dwellingup Futures Economic and Land Use Trends Analysis | FAR Lane and Roberts Day | July 2020 |
| Technical Appendix 5 | Scenario Impact Modelling Methodology | FAR Lane | November 2020 |
| Technical Appendix 6 | Study Areas and Maps | FAR Lane | November 2020 |
| Technical Appendix 7 | Alcoa of Australia Fact Sheet | Alcoa of Australia Ltd | June 2020 |
| Technical Appendix 8 | Dwellingup Discovery Forest – Zones and their key values. Map supplied by | Dwellingup Discovery Forest Working Group | August 2020 |
| Technical Appendix 9 | The Department of Planning Lands and Heritage Land Use Employment Survey Extract | Department of Planning, Lands and Heritage, extract formatted by FAR Lane | 2017 |
| Technical Appendix 10 | Map - Alcoa's Mineral Lease – Mineral Lease 1 State Agreement (ML1SA) | Hatch Roberts Day, Alcoa of Australia Ltd | June 2021 |
| Technical Appendix 11 | Large scale maps (Maps 1 - 4) as provided in the Roadmap. | Hatch Roberts Day | June 2021 |

TECHNICAL APPENDIX 1 - DETAILED SCENARIO ANALYSIS



SCENARIO 1 - DWELLINGUP FUTURE 1 BASE CASE

Greater Dwellingup continues to be a small community, characterised by limited population growth and an ageing population. It is supported by traditional mining and forestry, and a day trip visitor economy with limited expenditure within the Town. After an initial surge in visitation to the region following COVID-19 and the finalisation of the Adventure Trails Project, tourism growth and investment has plateaued. New trails are driving many of the additional visitors, and the following attractions are driving tourism in general:

- The recently constructed Trails and Visitor centre;
- Camping and adventure activities;
- Agri-tourism;
- Greater connectivity via rail experiences; and
- Locally produced art and products.

A generally high-volume tourism offer is resulting in limited opportunities to capture additional visitor spend. Annual visitation is expected to increase by 61,150¹.

Most visitors come to the region for day trips, however 24,460 (40%) of the new annual visitors in 2036 are overnight visitors that stay in parks, camping grounds or in casual short- stay accommodation in the town.

Mining activities continue as per Alcoa's EPA application and the local retail offer is growing moderately to reflect increased visitor demand.

This scenario assumes that industry trajectories reflect current (2020) trends and planned economic activity and provides a baseline against which other scenarios can be compared.

The key characteristics of scenario 1 are described in table 1. Assessment of the scenario against the three key analysis areas (resident population characteristics, industry activity and natural environment) is provided in tables 2, 3 and 4.

This scenario assumes there the total housing stock increases by 19 dwellings, as reflected by the baseline Forecast.id projection.

¹ Source: Shire of Murray, 2021.

Table 1 - Greater Dwellingup 2036 snapshot: Base case scenario

| POPULATION | MINING | TOURISM (OVERNIGHT) | TOURISM (DAY) | AGRICULTURE | FORESTRY | NATURAL RESOURCE MANAGEMENT | ARTS AND CULTURE | RETAIL AND SERVICES | OTHER INDUSTRIES |
|---|---|---|--|---|---|---|--|--|--|
| Low growth | Constant production | Moderate growth | Moderate growth | Constant production | Constant production | Constant activity | Moderate growth | Low growth | Constant production |
| Resident population of 817 (annual growth rate of 0.78% per annum). | As per table 4, page 25 of Part 1 of the Roadmap. | 145,440 overnight trips per annum (increase of 25,440). Average overnight visitor spend of \$101 per night (increase of \$11 per night). | 219,090 day trips per annum (increase of 38,160). Average day trip visitor spend of \$63 per day (increase of \$7 per day). | No additional growth in jobs or output. | No additional growth in jobs or output. | No additional growth in jobs or output. | Increase of 9.32 FTE jobs regionally providing an additional \$1.84 million in direct regional output. | Increase of 17 FTE direct jobs within the Shire of Murray providing an additional \$4.25m in direct regional output. | All other industries are expected to remain as constants. This is intended to reflect the relatively unchanged nature of these industries as outlined in the Economic and Land Use Trends Analysis Report. |

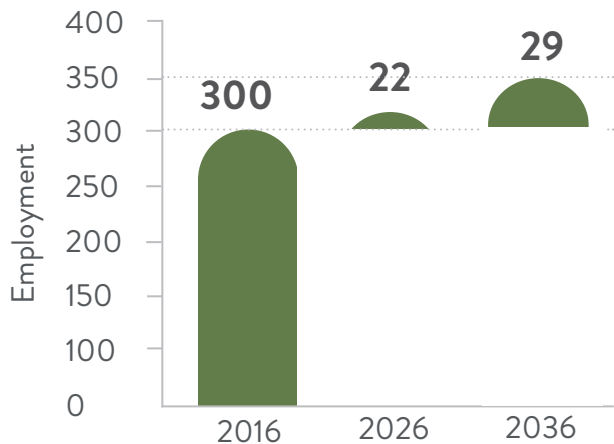
¹ DBCA Adventure Trails FAQ Sheet.

Assumptions informing the descriptions of the base case scenario (scenario 1) are based upon the trends and characteristics outlined in the Land Use Review, Literature Review, and Economic and Land Use Trends Analysis Report (Technical Appendix 2, 3 & 4).

Assumptions used to inform the descriptions of the business-as-usual scenario are based upon the trends and characteristics outlined in the Land Use Review, Literature Review, and Economic and Land Use Trends Analysis Report (Technical Appendix 2, 3 & 4).

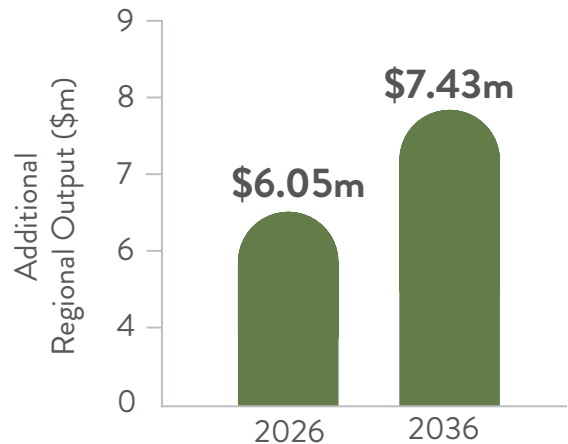
Figure 1 and Figure 2 illustrate that under a business-as-usual scenario, the additional tourism activity is likely to provide an additional 51 jobs within Greater Dwellingup by 2036 and an additional \$7.43m of direct output to Murray’s regional economy. This is largely driven by additional jobs in arts and recreation, and accommodation and food services to cater for the additional 65,150 visitors per annum.

Figure 1 – Additional local jobs under scenario 1



Source: FAR lane 2020, REMPLAN 2020

Figure 2 – Additional regional direct output under scenario 1



Source: FAR lane 2020, REMPLAN 2020

Table 2 - Assessment of Future Scenario 1 – Base case – Resident population characteristics considerations

| PEOPLE AND PLACE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|--|--|
| Future demographic and age profile | Scenario 1 represents an estimated population projection of 817 residents. This represents a low growth ageing population, under which community-oriented infrastructure may not be feasible. | The base case scenario projection presents challenges in building a case for investment in community-oriented infrastructure due to a lack of local catchment population. |
| Housing for current and future residents (1) | <p>Currently there is a total of 299 occupied dwellings within the study area, implying an average of 2.41 residents per household.</p> <p>Under the scenario 1 population projection, an estimated additional 37 dwellings would be required to support population growth (assuming the residents per dwelling was remain the same as the 2020 rate of 2.41). Considering approximately 98 unoccupied dwellings, a proportion of these could be counted towards the additional dwellings for this population (assuming they are fit for purpose)</p> <p>Consultation indicated the housing stock is ageing and not appealing or suitable for new families.</p> <p>Additional housing is subject to bushfire risks and limited capacity of existing infrastructure required to service increase housing stock.</p> | <p>An additional 280 dwellings would be required to realise the capacity to reach the target required population.</p> <p>There is insufficient housing supply and available land for additional residential development to support the required population.</p> <p>Due to bushfire risk, water infrastructure and constraints there are ongoing limitations in developing additional residential dwellings.</p> |
| Housing for current and future residents (2) | <p>Under scenario 1, there is a risk that Greater Dwellingup's housing stock may be utilised for accommodation and holiday house purposes to cater for an additional 25,440 overnight visitors. Current housing stocks in Greater Dwellingup (299) are already constrained, with limited available lands for future development.</p> <p>If 15 dwellings (5.1%) of the current occupied dwellings in Greater Dwellingup were to be utilised exclusively for short stay accommodation (assuming 2.41 residents per occupied dwelling), Greater Dwellingup would lose approximately 21 residents. This would reduce the population in 2026 to 705 and 2036 to 684 residents.</p> | <p>Greater Dwellingup requires an additional 15 (total of 314) dwellings for residential purposes if the same number of dwellings were to be utilised for short stay accommodation, whilst maintaining a stable residential population.</p> <p>There is a moderate risk in Greater Dwellingup's housing stock being utilised for accommodation and holiday house purposes. This could result in a reduction of the residential population which will impact the feasibility of social amenities such as the school and health care services.</p> |

| PEOPLE AND PLACE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|---|
| The need and importance of childcare and primary schooling within Greater Dwellingup (1) | Scenario 1 projections estimates Greater Dwellingup will have 67 primary school aged children in 2026, and 75 in 2036. This implies approximately 60 school enrolments could be realised. | To support a local primary school of 100 students, a population base of 1,232 residents, or 124 school aged children is required. The scenario 1 population projection would be insufficient to ensure that this service being provided locally at a desirable scale. |
| The need and importance of childcare and primary schooling within Greater Dwellingup (2) | Scenario 1 projections estimate Greater Dwellingup will have a total of 30 children eligible for childcare in 2026, and 34 in 2036. Based on this a total, 7.43 childcare places could be demanded in Greater Dwellingup. | To support the provision of local childcare services, a population base of 1,232 residents and implied 47 eligible children would be required. The scenario 1 population projection would therefore be insufficient to support this service being provided locally. |
| The provision of aged care and ageing in place services | <p>The scenario 1 population projection estimates Greater Dwellingup will have 102 residents over the age of 70 in 2026 and 116 over the age of 70 in 2036. This reflects an increase of 33 residents over the age of 70 (40% increase) compared to 2020.</p> <p>Based on government aged care provision ratios, approximately 38 hours of home and community care support should be made available per eligible recipient over the age of 70. Under scenario 1 approximately 4 full time direct carers would be required to service the ageing population.</p> | <p>The lack of existing supply of aged care services does not currently enable the projected elderly population to age in place. If the target population trajectory of 1,232 was to be met, the demand for aged care would require up to 6 aged care workers in Greater Dwellingup in 2036 to provide home and community care services.</p> <p>Considering Greater Dwellingup has a lack of aged care and workers, significant investment would be required to support the population.</p> |
| Access to health services | <p>There are limited healthcare services within Greater Dwellingup.</p> <p>Under scenario 1 population estimates, there could be demand for one GP for 2.8 days a week by 2026, and one GP for 3 days a week by 2036.</p> | <p>To justify the provision of additional one GP or remote nursing services in Greater Dwellingup, an estimated additional 415 residents would be required.</p> <p>Under scenario 1 there would be insufficient demand for a full time GP/ remote nursing service within the Greater Dwellingup town site. It is assumed that the demand for medical services would be met in Pinjarra.</p> |
| Availability of local employment opportunities | Scenario 1 estimates an additional 51 direct jobs within Greater Dwellingup driven by additional tourism activity. 22 of these jobs would be required by 2026, and further 29 by 2036. | <p>An estimated additional 87 local jobs need to be realised to support target residential population growth by and maintain employment self-containment in 2036.</p> <p>Under scenario 1 there would be a gap of 36 jobs. This means that there is insufficient additional economic activity to support the number of jobs required for a population of 1,232 residents by 2036.</p> |

| PEOPLE AND PLACE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---------------------------------|---|---|
| The nature of local amenity | <p>Greater Dwellingup's current retail floorspace is 860m² according to the most recent Department of Planning, Lands and Heritage Land Use Employment Survey (see technical appendix 9).</p> <p>The current convenience retail offering is likely to be sufficient for the projected population.</p> <p>An additional 81m² of additional retail floorspace is likely to be driven by overnight tourism visitation and possibly additional expenditure from additional workers in the region. Greater levels of employment intensity (per sqm) could also service this increased demand, without necessitating an increase in total floorspace.</p> | <p>The current convenience retailing offering is likely to be sufficient for the projected population in 2026 and 2036.</p> <p>It is unlikely that there is currently enough vacant commercial floorspace to accommodate additional retail within Town that would be demanded if the target population were to be reached² & ³.</p> |

² DPLH Land Use Employment Survey 2017/18

³ Dwellingup Structure Plan 2012

Table 3 - Assessment of Future Scenario 1 – Base case – Enterprise and economy considerations

| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|--|--|
| Quantifying the economic impact of tourism | <p>Under scenario 1, increased visitor spend in Greater Dwellingup of \$4.961m per annum by 2036 is estimated to support an:</p> <ul style="list-style-type: none"> • Additional 18 FTE direct local jobs. • Additional 23 FTE indirect jobs within Greater Dwellingup and the Murray region. • Additional 32 FTE induced jobs within Greater Dwellingup and the Murray region. • \$1.9 million direct gross value added to local economy. • \$4.96 million direct output added to the local economy. | <p>Increased tourism visitation alone would not provide a sufficient amount of jobs to support target population growth. An additional \$8,283m per annum in visitor spending alone would be required for tourism to support 87 new local jobs.</p> <p>The lack of potential tourism expenditure capture (through predominantly non-bookable nature-based experiences) and unmet demand for casual short-stay accommodation within the town are likely contributors to tourism not being able to support the required job growth.</p> |
| Quantifying the economic impact of mining | <p>Under all scenarios, the proposed mining activity at Holyoake will enable mining to continue to significantly contribute to the regional and local economy in the order of \$717m in output, supporting approximately 450 direct mining jobs within the Murray region and 4,000 jobs throughout the peel region by 2036.</p> <p>For Greater Dwellingup, this equates to mining potentially supporting a total of 555 jobs, or \$717m of output by 2036.</p> | <p>Almost 30% of all mining workers in the Shire of Murray were aged 50 years and old in June 2016. Assuming a similar demographic profile at Holyoake, 130 employees at Holyoake could retire by 2036. Assuming jobs remain available - this presents an opportunity for up to 130 new employees to work at Holyoake.</p> <p>These new employees will not necessarily become Greater Dwellingup residents, especially considering housing supply constraints and availability of local services.</p> <p>Perceived conflicts between mining, tourism, natural resource management and disease risk management activities will need to be proactively managed to optimise economic activity and employment within the Study area.</p> |
| Quantifying the economic impact of agriculture, forestry and fishing | <p>There is currently limited evidence of a growth trend for additional investment focussed on agriculture, forestry and fishing industries.</p> <p>Additional activity on agricultural land is likely to fall under visitor services such as accommodation and food services. Based on this, the scenario 1 estimates the following constant activity in these industries by 2036:</p> <ul style="list-style-type: none"> • 0.1 FTE direct local employment. • \$0.03m in gross value added. • \$0.05m in direct local output. | <p>The base case scenario continues the trend of limited additional future investment focussed on agriculture, forestry and fishing industries.</p> <p>Under this scenario, activity in these industries will not be a significant contributor to additional economic activity and job creation in Greater Dwellingup from traditional agricultural produce.</p> <p>However, local agricultural assets will continue to act as a driver for tourism visitation.</p> |

| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|---|
| Quantifying the economic impact of natural resource management activities | <p>There is currently limited economic activity focussed on natural resources management (outside of mining) science and research opportunities within Greater Dwellingup. Based on this, the scenario 1 estimates the following constant activity in these industries by 2036:</p> <ul style="list-style-type: none"> • 1 FTE direct local employment. • \$0.06m in direct gross value added. • \$0.08m in direct local output. | <p>Scenario 1 continues the trend of limited infrastructure and resources, training and economic activity alignment to support natural resources management, science and research opportunities.</p> <p>As such, constant activity in these industries will not be a significant contributor to job creation in Greater Dwellingup.</p> |

Table 4 - Assessment of Future Scenario 1 – Base case – Environment, culture, and heritage

| ENVIRONMENT, ARTS, CULTURE AND HERITAGE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|--|--|
| <p>The value of the Greater Dwellingup's natural environment for its contribution to brand and identity of Dwellingup</p> | <p>Under scenario 1, Greater Dwellingup's natural environmental offer is not invested in beyond the current planned activities. Significant conflicts are likely to remain in multiple use State Forest areas that surround the town site, with competing demands between mining, tourism.</p> <p>The proposed mine site at Holyoake could impact recreation and conservation sites that could be utilised for natural resource management, including:</p> <ul style="list-style-type: none"> • Etmilyn • Plavins • Inglehope • Amphion Chadoora | <p>Scenario 1 represents a potential lost opportunity to drive additional visitation through nature and education-based tourism experiences, as well as Indigenous tourism experiences. On this basis, Scenario 1 does not align with the vision statement where its natural resources are enhanced and ability to make most out of the best assets is compromised by a lack of investment in industries that support the natural environment.</p> |

It is important to note that the Environmental Protection Act (1986) continues to be the statutory mechanism through which issues concerning the environment will be addressed.



Scenario 1 represents a future where Greater Dwellingup is unlikely to realise the vision set by the community, or the target population required to support the provision of the desired services. This is largely driven by reliance on a single industry (tourism) for growth, resulting in relatively stagnant population growth that present barriers to investment in social amenities and employment opportunities.

In addition, whilst there is an abundance of tourism infrastructure within Greater Dwellingup, under the base case scenario, no further investment in the tourism offer will result in missed opportunities to maximise additional expenditure and realise the industry's full time job creating potential. This is because the predominant types of attractions on offer are non-bookable (i.e. trails and hikes), and many visitors continue to access visitor services and amenities elsewhere in the region (i.e. Pinjarra and Mandurah) where there is a larger offer.





SCENARIO 2 - DWELLINGUP FUTURE 2 ADVENTURE TOURISM TOWN

Greater Dwellingup is a significant WA tourism destination and an International National Trails Town, built predominantly on trails and adventure-based experiences. Tourism in Greater Dwellingup has leveraged the initial burst of demand for regional tourism post COVID-19 and success of Adventure Trails Project, and continues to grow its offer, creating more activity and adventure-based attractions for visitors to explore. Greater Dwellingup is supported by broader ongoing investments in tourism in the Peel region, as well as continued public and private sector investment in attractions, short stay accommodation and hospitality. The additional 105,000 visitors per annum are primarily driven by the significant and ongoing investment in adventure-based tourism experiences including:

- A large and growing network of bike and hiking trails;
- Strong calendar of sports and adventure-based events and competitions;
- Family friendly activities;
- Water (i.e. rivers and dams) based activities;
- Camping and adventure activities; and
- Greater connectivity via rail experiences.

Most visitors are coming to the region for day trips, however 55,000 (60%) of the additional annual visitors are staying overnight and are increasingly choosing the growing supply of casual short-stay accommodation within the town.

In response, landowners are choosing to shift from residential rental markets to the provision of casual short- stay accommodation via platforms such as Airbnb. Buyers of property also tend to shift from owner-occupier families to non-resident owners, instead utilising housing as a holiday home.

Greater Dwellingup experiences long shoulder periods and capacity peaks that extend throughout summer, autumn and spring school holidays. Not only are significantly more people visiting Greater Dwellingup for adventure, but the region is also capturing more transactions per visitor and increased spend per transaction. This is driving tourism related investment in and around the town.

Natural resource management plays a small but significant role in servicing the visitor economy. Mining activities continue as per Alcoa's EPA application and the local retail offer grows on the basis of increased visitor demand.

The impact of rapid tourism growth in the region is being felt by Greater Dwellingup's residential population. As people buy up housing stock for holiday homes and to rent out as casual short-stay accommodation, there is less stock available for long term renters and owner occupiers. With a smaller residential population, there is a flow on impact on local demand for provision of population services.

The capacity of infrastructure to service tourism development opportunities is constantly being challenged. Bushfire risk management remains a significant challenge, especially during peak visitor periods. and limits the ability of the community to bring on more land for residential housing development.

In addition, there are environmental impacts (land and water) associated with a significant increase in tourism infrastructure and attractions as infrastructure and management struggles to mitigate the impacts of behaviours during peak periods.

The key characteristics of scenario 2 are described in table 5. Assessment of the scenario against our three key analysis areas (resident population characteristics, industry activity and natural environment) is provided in tables 6, 7 and 8.

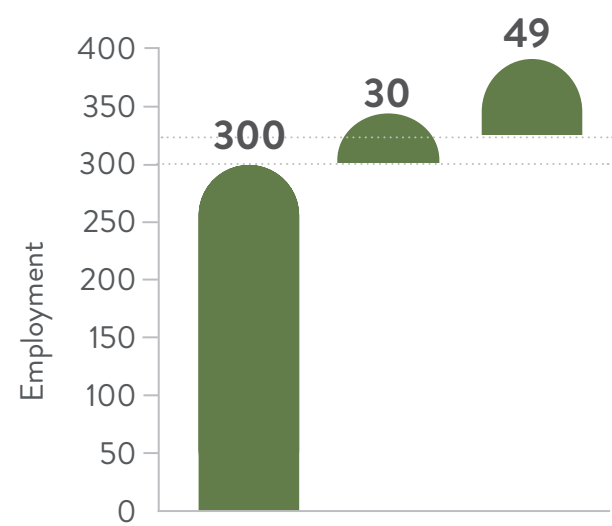
Table 5 - Greater Dwellingup 2036 snapshot: Adventure tourism town

| POPULATION | MINING | TOURISM (OVERNIGHT) | TOURISM (DAY) | AGRICULTURE | FORESTRY | NATURAL RESOURCE MANAGEMENT | ARTS AND CULTURE | RETAIL AND SERVICES | OTHER INDUSTRIES |
|--|---|--|--|---|---|---|-------------------------------|--|--|
| Moderate contraction | Constant production | High growth | High growth | Constant production | Constant production | Constant activity | Moderate growth | High growth | Constant production |
| Residential population of 543 (annual contraction rate of -1.59% per annum) as the result of increased demand and limited supply short stay accommodation. | As per table 4, page 25 of Part 1 of the Roadmap. | 181,300 overnight visits per annum (Increase of 42,000 visits per annum). Average overnight visitor spend \$101 (increase of \$12 per night). | 223,700 day trips per annum (increase of 43,700 visits per annum). Average day trip visitor spend \$63 per day visit (increase of \$9 per day visit). | No additional growth in jobs or output. | No additional growth in jobs or output. | No additional growth in jobs or output. | 14 additional jobs FTE added. | Estimated increase of 50 FTE direct jobs as a result of increased tourism expenditure. | All other industries is expected to remain as constants to reflect the relatively stagnant nature of these industries as outlined in the Economic and Land Use Trends Analysis Report. |

Assumptions informing the descriptions of the adventure tourism town scenario 2 are based upon the trends and characteristics outlined in the Land Use review Literature Review, and Economic and Land Use Trends Analysis Report (Technical Appendix 2, 3, & 4).

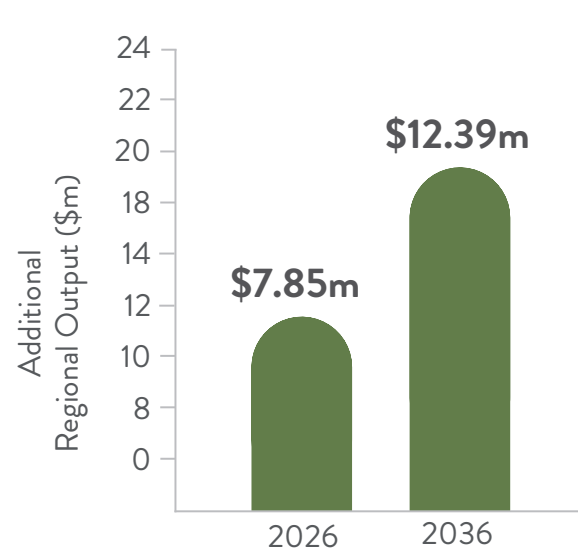
Figure 3 and Figure 4 illustrate that under an Adventure Tourism Town, the additional tourism activity is likely to provide an additional 79 jobs within Greater Dwellingup by 2036 and an additional \$12.39m of output to Murray’s regional economy. This is largely driven by additional jobs in arts and recreation services, and accommodation and food services to cater for the additional 105,000 visitors per annum.

Figure 3 – Additional local jobs under scenario 2



Source: FAR lane 2020, REMPLAN 2020

Figure 4 - Additional direct regional output under scenario 2



Source: FAR lane 2020, REMPLAN 2020

Table 6 - Assessment of Future Scenario 2 – Adventure tourism town – People and place considerations

| PEOPLE AND PLACE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|---|
| Future demographic and age profile | Scenario 2 population of 543 residents equates to a significant contraction in resident population. This is driven by shift from residential rental markets to the provision of casual short-stay accommodation via platforms such as AirBnB and purchase of existing housing stock as holiday homes. | The declining resident population under scenario 2 presents challenges in building cases for investment in community-oriented infrastructure due to the decline in residential population. |
| Housing for current and future residents (1) | <p>Currently there is a total of 299 occupied dwellings within the study area, implying an average of 2.41 residents per household.</p> <p>Consultation indicated that current housing stock is ageing and not appealing to new families and residents. Additional housing is also subject to bushfire risks and capacity constraints on infrastructure required to service additional housing stock.</p> | <p>Under scenario 2, there is insufficient housing supply and available land for additional residential development to support the required population.</p> <p>The rapid tourism growth will erode the existing character and small-town charm as the residential community transitions into a tourism-oriented town.</p> <p>Due to bushfire risk, water infrastructure and constraints there are challenges in developing additional residential dwellings.</p> |
| Housing for current and future residents (2) | <p>Under scenario 2, there is a significant risk in Greater Dwellingup's housing stock being utilised for accommodation and holiday house purposes. Current housing stocks in Greater Dwellingup (397) are already constrained, with limited available lands for future development.</p> <p>Demand modelling suggests potential for a total of 74 (24.7%) of currently occupied dwellings in Greater Dwellingup to be utilised exclusively for accommodation. Assuming 2.41 residents per occupied dwelling, Greater Dwellingup would lose approximately 185 residents, reducing the population in 2026 to 635 and 2036 to 542 residents.</p> | <p>There is significant risk in Greater Dwellingup's housing stock being utilised for accommodation and holiday house purposes. The consequence is a declining residential population which will impact the feasibility of social amenities such as the school and health care services.</p> <p>An additional 352 dwellings would be required to provide capacity to achieve a residential population of 1,232 and cater for an additional 50,000 overnight visits.</p> |
| The need and importance of childcare and primary schooling within Greater Dwellingup (1) | <p>Scenario 2 projection estimates that in Greater Dwellingup there will be 54 primary school aged children in 2026, and 48 in 2036, implying 38 school enrolments would be realised when taking into consideration the declining resident population.</p> <p>To support a local primary school of 100 students, an additional 689 residents would be required.</p> | <p>The potential impacts of Greater Dwellingup rapidly growing as a tourist/holiday-home town suggests a residential population is likely contract rather than grow to 1,232 residents.</p> <p>Scenario 2 projections imply the population would potentially be insufficient to ensure that this service being provided locally at a desirable scale.</p> |

| RESIDENT POPULATION CHARACTERISTIC CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|--|
| The need and importance of childcare and primary schooling within Greater Dwellingup (2) | Scenario 2 projections estimate that in Greater Dwellingup there will be 23 children eligible for childcare in 2026, and 20 in 2036. This implies that 4.37 childcare places could be supported by this population. | To support the provision of local childcare services, A population base of 1,232 residents (additional 689 residents), or 47 eligible children is required. The scenario 2 population projection would therefore be insufficient support this service being provided locally. |
| The provision of aged care and ageing in place services | Scenario 2 population projections estimate Greater Dwellingup will have 88 residents over the age of 70 in 2026 and 81 over the age of 70 in 2036. This reflects a decrease of 1 resident over the age of 70 compared to 2020. Based on government aged care provision ratios, approximately 38 hours per week of home and community care and support should be made available per eligible recipient over the age of 70. Under scenario 2, approximately 3 full time direct carers would be required to service the ageing population. | The lack of existing supply of aged care services does not currently enable the projected elderly population to age in place. If the target population of 1,232 were to be reached, the demand for aged care would require up to 6 aged care workers in Greater Dwellingup in 2036 to provide home and community care services. Considering Greater Dwellingup's existing lack of aged care and workers, significant investment would be required to support the population. |
| Access to health services | There are limited healthcare services within Greater Dwellingup. Under scenario 2 population estimates, there could be demand for one GP for 2.37 days a week by 2026, and one GP for 2 days a week by 2036. | To justify the provision of GP / remote nursing services in Greater Dwellingup, an estimated additional 689, residents would be required. Under the scenario 2 there would be insufficient demand for a full time GP/remote nursing service within the Dwellingup town site. A contracting population suggests the demand for healthcare is likely to continue to be realised in Pinjarra. |
| Availability of local employment opportunities | Scenario 2 estimates an additional 30 jobs in Greater Dwellingup by 2026, and 49 by 2036 for a total of 79 additional jobs driven by a high growth tourism visitation. Due to the contracting available workforce as a consequence of population decline, it is likely that these additional jobs that stem from a high growth tourism industry would be filled by the regional workforce outside of Greater Dwellingup in 2036. | Approximately 124 additional local jobs need to be realised to support target residential population growth by 2036. Scenario 2 suggests that 64% of the required additional jobs could be met to support the target population of 1,232. Under scenario 2, there would be insufficient additional economic activity to support the number of jobs required. It is also unlikely the resident population could provide a sufficient local workforce; therefore a majority of these jobs are likely to be met by the regional workforce outside of Greater Dwellingup. |



| RESIDENT POPULATION CHARACTERISTIC CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|--|
| The nature of local amenity (1) | <p>Greater Dwellingup's current retail floorspace is 860m².⁴</p> <p>Under scenario 2 population projections, no additional population driven retail floorspace would be demanded in 2036. Therefore, the existing convenience retail offer is likely to be sufficient for the resident population under scenario 2 projections.</p> <p>An additional 145m² of additional retail floorspace is likely to be viable to service overnight and day-trip tourism visitation.</p> | <p>The current convenience retailing offering is likely to be sufficient for the projected residential population over 2026 and 2036.</p> <p>It is unlikely to be there is enough vacant commercial floorspace to accommodate 145m² of additional retail within the Town to accommodate the target population^{5 & 6}.</p> <p>Additional floorspace would have to be identified through re-purposing existing floorspace or by creating new floorspace.</p> |
| The nature of local amenity (2) | <p>The Department of Planning Lands and Heritage Land Use Employment Survey (technical appendix 8) suggests there is an estimated 2,350m² NLA of commercial floorspace within the Study Area as of 2017. Approximately 70m² (3%) is vacant.</p> <p>Additional commercial land will be vital in enduring there is capacity for Greater Dwellingup to fully realise the increased visitation expenditure from a high growth tourism industry.</p> <p>An additional 1,042m² of commercial floorspace for mixed business such as hospitality, retail and healthcare services could be demanded. This is based upon the additional 50 jobs in hospitality and retail driven industries resulting from increased tourism levels.</p> | <p>On this basis, there is insufficient vacant commercial land to fully capture the additional expenditure from a high growth tourism industry.</p> <p>The structure and location of this commercial land is likely to be realised both in the Town itself, and near key tourism assets including Lane Pool and popular mountain bike trails.</p> |

⁴DPLH Land Use Employment Survey 2017/18

⁵ DPLH Land Use Employment Survey 2017/18

⁶ Dwellingup Structure Plan 2012

Table 7 - Assessment of Future Scenario 2 – Adventure tourism town – Enterprise and economy considerations

| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|--|--|
| Quantifying the economic impact of tourism | <p>Under scenario 2, increased visitor spend in Greater Dwellingup of \$8.9m per annum by 2036 is estimated to support:</p> <ul style="list-style-type: none"> • Additional 33 FTE direct jobs. • Additional 44 FTE indirect jobs. • Additional 58 FTE jobs within Greater Dwellingup. • \$3.6m direct gross value added to the Shire of Murray's Regional economy. • \$14m of additional output to the Murray Regional economy. | <p>The estimated contraction in the resident population results in no change to the Greater Dwellingup resident workforce. On this basis, almost all additional jobs are likely to be met by regional workforce outside of Greater Dwellingup.</p> |
| Quantifying the economic impact of mining | <p>Under all scenarios, mining at Holyoake has the potential to continue to significantly contribute to the regional and local economy. This equates to \$717m in output, supporting approximately 4,000 jobs throughout the region by 2036.</p> <p>For Greater Dwellingup, this equates to mining potentially supporting approximately 555 jobs, or \$717m of output by 2036.</p> <p>Currently (2020) compared to mining; tourism, education and training and scientific services contribute to 3.88% of Murray's regional output and 14.1% of employment compared with mining's 18.67% of output and 11.31% of employment. For these industries to have a comparable economic impact to mining in terms of regional output, they would need to generate 4,400 jobs within the region by 2036.</p> <p>Conflicts between mining and the potential for tourism as well as disease risk management areas should be considered in context of the potential to provide economic activity and employment within the Study area.</p> | <p>Almost 30% of all mining workers in the Shire of Murray were aged 50 years and old in June 2016. Assuming a similar demographic profile at Holyoake, potential 130 employees at Holyoake could retire by 2036. Assuming jobs remain available - this presents an opportunity for up to 130 new employees to work at Holyoake. Given the average salary for a mine operator is reported to be \$140,000 per annum, mining employment could provide not only high paying jobs, but additional wages and salaries that could be captured within Dwellingup.</p> <p>These new employees will not necessarily become Greater Dwellingup residents however, considering existing housing constraints and amenity.</p> <p>Under the scenario 2 population projection, the additional jobs would likely be met by the regional workforce outside of Greater Dwellingup.</p> <p>Perceived conflicts between mining and the potential impacts on available tourism land will need to be actively managed as the footprint of both activities has the potential to increasingly overlap.</p> |



| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|---|
| Quantifying the economic impact of agriculture, forestry and fishing | <p>There is currently limited evidence of a growth trend for additional future investment focussed on agriculture, forestry, and fishing industries.</p> <p>Additional activity on agricultural land is likely to fall under visitor services such as accommodation and food services to reflect the trend of producers providing a hospitality-based tourism attraction.</p> <p>Based on this, scenario 2 estimates the following constant activity in these industries within Dwellingup by 2036:</p> <ul style="list-style-type: none"> • 0.18 FTE direct local employment. • \$0.05m in gross value added. • \$0.1m in direct regional output. | Scenario 2 continues the trend of limited additional future investment focussed on agriculture, forestry, and fishing industries, as the focus is instead focused on catering for a high growth tourism economy. |
| Quantifying the economic impact of natural resource management activities | <p>There is currently limited economic activity focussed on natural resources management (outside of mining) science and research opportunities within Greater Dwellingup. Based on this, the scenario 2 estimates the following constant activity in these industries by 2036:</p> <ul style="list-style-type: none"> • 1 FTE direct local employment. • \$0.10m in new direct gross value added. • \$0.14m in direct Regional output. | <p>Scenario 2 continues the trend of limited infrastructure and resources, training and economic activity alignment to support natural resources management, science and research opportunities.</p> <p>As such, constant activity in these industries will not be a significant contributor to job creation in Greater Dwellingup.</p> |

Table 8 - Assessment of Future Scenario 2 – Adventure tourism town – Environment, arts, culture and heritage considerations

| ENVIRONMENT, ARTSCULTURE AND HERITAGE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|--|---|
| The value of Dwellingup's natural environment for visitation | <p>Under scenario 2, Greater Dwellingup's natural environment offer is not invested in beyond the current planned activities. Significant conflicts are likely to remain in multiple use State Forest areas that surround the town site, with competing demands between mining, tourism and natural resource management activities. The proposed mine site at Holyoake could impact recreation and conservation sites that could be utilised for natural resource management, including:</p> <ul style="list-style-type: none"> • Etmilyn • Plavins • Inglehope • Amphion Chadoora | <p>Scenario 2 represents a potential lost opportunity to drive additional visitation through nature and education-based tourism experiences, as well as Indigenous tourism experiences.</p> <p>On this basis, Scenario 2 does not align with the vision statement where its natural resources are enhanced and ability to make most out of the best assets is compromised by a lack of investment in industries that support the natural environment.</p> |

It is important to note that the Environmental Protection Act (1986) continues to be the statutory mechanism through which issues concerning the environment will be addressed.



Scenario 2 represents a future where Greater Dwellingup is unlikely to realise the vision set by the community. The rapid expansion of the tourism industry generates a significant demand for the provision of short stay accommodation, leading to a reduction in housing stock available for permanent residents (both current and future). The impact of this is a contraction in the local population which in turn is unable to support the provision of additional population services.

Ongoing and considerable investment in transforming Greater Dwellingup into a high-profile adventure tourism destination has impacts for the natural environment and incrementally erodes the Town's character and charm, both of which are assets with high value to the community. This suggests future projects need to consider the management of growth to avoid the visions concern for Greater Dwellingup rapidly expanding as a tourist town.

Visitor expenditure can however realise by 2036 an additional 79 direct jobs and 1,742m² of additional tourism and retail floorspace within Greater Dwellingup. This suggests future projects be geared towards ensuring Greater Dwellingup has the right tools to manage tourism growth, particularly around in town accommodation to encourage population growth and commercial opportunities.





SCENARIO 3 - DWELLINGUP FUTURE 3 DIVERSIFIED ECONOMY

Under Scenario 3, Greater Dwellingup is a highly liveable community that is growing sustainably, managing to strike a balance between visitors and residents. Proactive planning and development have resulted in housing no longer being a constraint to residential population growth. Place making activities have been oriented towards creating vibrancy, amenity, and services for the local population – making it a great place for people to live. The population of Dwellingup has grown to a point where it comfortably sustains the required community-oriented services such as child-care, schooling, aged-care and health care.

The completion of the Adventure Trails Project and COVID-19 resulted in an initial spike in travel to Greater Dwellingup - this has been capitalised on through ongoing public and private sector investment, and Dwellingup is established as an International Trails Town that enjoys strong and stable visitation. Most people are coming to the region for day trips, however 42,000 of new annual visitors are staying overnight. They typically camp at Lane Poole Reserve or utilise short stay accommodation in the town. A focus on providing more bookable experiences is increasing the capture of visitor

Tourism investment prioritises and celebrates Greater Dwellingup's natural resources and creates unique science, education, and nature-based experiences. Visitors are coming to Greater Dwellingup for the day to experience Indigenous culture and history, and a booming arts scene is helping the community to enhance Greater Dwellingup's unique character and charm. A diverse tourism offer and increased visitation enables investment in new food and dining experiences that are also

putting the community on the map.

A strong focus on natural resource management has brought additional local research projects which are tied to the Bushfire Centre of Excellence, bush regeneration, post-mine futures and mine site rehabilitation, resulting in new jobs in professional, scientific, technical, public administration, safety and education and training sectors.

Greater Dwellingup's natural assets, Indigenous heritage and Western heritage are celebrated through experiential education products and services focussed on school groups. These products also augment the outdoor education syllabus activities already undertaken in Greater Dwellingup.

Mining activities continue as described in table 4, page 25 (of Part 1 of the Roadmap), and the local retail offer grows moderately on the basis of increased visitor and permanent resident demand.

The key characteristics of scenario 3 are described in table 9. Assessment of the scenario against our three key analysis areas (resident population characteristics, industry activity and natural environment) is provided in tables 10, 11 and 12.

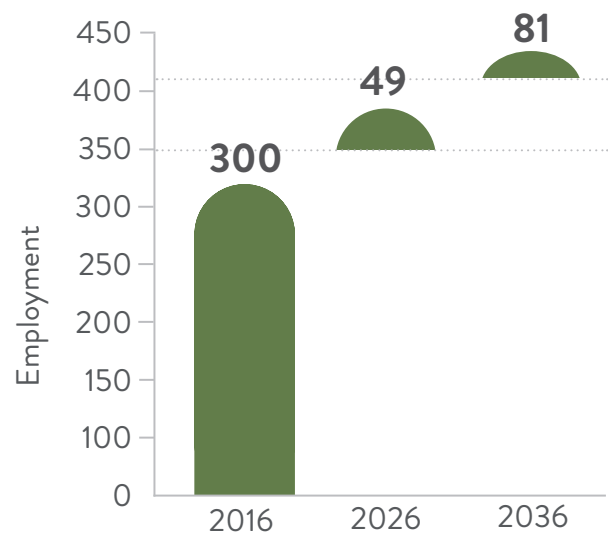
Table 9 - Greater Dwellingup 2036 snapshot: Adventure tourism town

| POPULATION | MINING | TOURISM (OVERNIGHT) | TOURISM (DAY) | AGRICULTURE | FORESTRY | NATURAL RESOURCE MANAGEMENT | ARTS AND CULTURE | RETAIL AND SERVICES | OTHER INDUSTRIES |
|---|--------------------------|--|---|---------------------------------------|---------------------------------------|--|--|--|---|
| High growth | Constant production | Moderate growth | High growth | Constant production | Constant production | High growth | High growth | Low growth | Constant production |
| 1306 (annual growth rate of 2.08% per annum). | As per table 4, page 25. | 162,000 overnight visits per annum (increase of 42,000 overnight visitors per annum). Average overnight visitor spend \$101 (increase of \$12). | 204,000 day trips per annum (increase of 24,000 day visits per annum). Average day trip visitor spend \$63 (increase of \$9) . | No additional jobs or output assumed. | No additional jobs or output assumed. | 22 additional professional, scientific & technical services jobs FTE. 8 additional public administration & safety jobs FTE. 16 additional education and training jobs FTE. Contributing a combined direct output of \$5.69 of output to the regional economy. | 24 additional direct jobs providing an additional \$4.7m of direct output to the regional economy. | No additional jobs or output assumed; low growth is a result of tourism expenditure within Dwellingup. | All other industries is expected to remain as constants to reflect the relatively stagnant nature of these industries as out-lined in the Economic and Land Use Trends Analysis Report. |

Assumptions informing the descriptions of the diversified economy scenario (3) are based upon the trends and characteristics outlined in the Land Use Review, Literature Review, and Economic and Land Use Trends Analysis Report (Technical Appendix 2, 3 & 4).

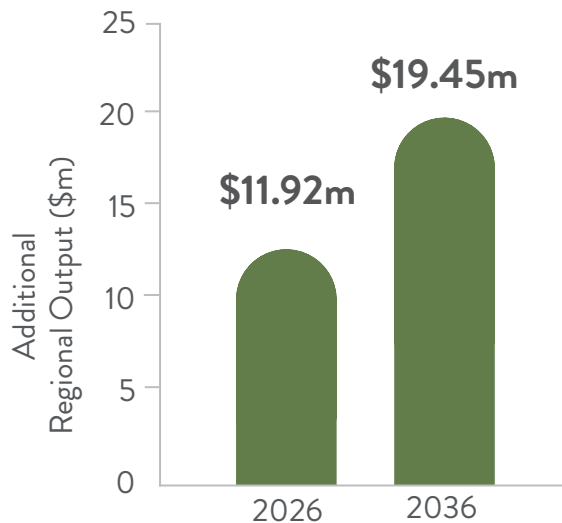
Figure 5 and Figure 6 illustrate that under a diversified economy scenario, the additional tourism activity is likely to provide a further 130 jobs within Greater Dwellingup by 2036 and an extra \$19.11m of output to Murray’s regional economy. This is largely driven by additional jobs in arts and recreation services, and accommodation and food services to cater for the additional 40,000 visitors per annum and additional jobs in natural resource management industries.

Figure 5– Additional local jobs driven by scenario 3



Source: FAR lane 2020, REMPLAN 2020

Figure 6 - Additional regional output under scenario 3



Source: FAR lane 2020, REMPLAN 2020

Table 10 - Assessment of Future Scenario 3 – Diversified economy- against vision and goals
People and place considerations

| PEOPLE AND PLACE CHARACTERISTICS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|--|
| Future demographic and age profile | Scenario 3 population projection of 1,306 residents estimates a high growth population characterised by an increased school and working age population, under which community-oriented infrastructure is likely to be feasible. | Baseline population projection presents opportunities for building a case for investment in community-oriented infrastructure. |
| Housing for current and future residents (1) | <p>Currently there is a total of 299 occupied dwellings within the study area, implying an average of 2.41 residents per household.</p> <p>Under a scenario 3 population projection, an estimated additional 242 dwellings would be required to support the population growth (assuming the residents per dwelling was to be consistent with the 2020 rate of 2.41).</p> <p>Consultation indicated the housing stock is ageing and not appealing to new families and residents. Furthermore, additional housing is subject to bushfire risks and limited service infrastructure capacity to bring new stock on to meet a gap of 242 dwellings to realise this population.</p> | <p>Under the required population projection 542 dwellings, representing a gap of 242 required to support a population of 1,306 residents by 2036.</p> <p>On this basis, an additional 242 houses would be required to realise the capacity to grow a diversified economy population through housing supply, while maintaining and enhancing the charm and character of Greater Dwellingup. Under scenario 3, there is insufficient housing supply and available land for additional residential development to support the population projection.</p> <p>Due to bushfire risk, water infrastructure and infrastructure constraints there are likely to be challenges in developing additional residential dwellings.</p> |
| Housing for current and future residents (2) | <p>Under scenario 3 there is a moderate risk in Greater Dwellingup's housing stock being utilised for accommodation and holiday house purposes. Current housing stocks in Greater Dwellingup (299 occupied dwellings) are already constrained, with limited available lands for future development.</p> <p>Demand modelling suggests potential for a total of 24 (4%) of the projected required 542 dwellings to be utilised exclusively for short stay accommodation. Assuming 2.41 residents per household, Greater Dwellingup would lose 57 residents, increasing the scenario 3 projected population in 2026 to 951 and 2036 to 1,249 residents.</p> | Under scenario 3, the growth of the tourism sector is moderately sustainable and provides the community with the opportunity to balance the demand for short stay accommodation with long term / permanent accommodation, minimising the constraints on population growth. As such, there is potential under this scenario for population growth to be accommodated locally to the extent that it underpins demand for local population services. |

| PEOPLE AND PLACE CHARACTERISTICS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|---|---|
| The need and importance of childcare and primary schooling within Greater Dwellingup (1) | Scenario 3 projections estimate that in Greater Dwellingup there will be 97 primary school aged children in 2026, and 168 in 2036. This implies 134 school enrolments could be realised. | <p>To support a local primary school of 100 students, a population base of 1,232 residents, or 134 children is required.</p> <p>The scenario 3 population projection suggests a population of 168 school aged children by 2036. Therefore, the population projection under a diversified economy is sufficient in supporting this service being provided locally with sufficient scale and community.</p> |
| The need and importance of childcare and primary schooling within Greater Dwellingup (2) | Scenario 3 projections estimate that in Greater Dwellingup there will be 58 children eligible for childcare in 2026, and 83 in 2036. This implies that 18 childcare placements could be demanded. | The scenario 3 population projection would therefore be sufficient to support this service being provided locally. |
| The provision of aged care and ageing in place services | <p>Scenario 3 population projection estimates Greater Dwellingup will have 104 residents over the age of 70 in 2026 and 119 over the age of 70 in 2036. This reflects an increase of 36 compared to 2020.</p> <p>Based on government aged care provision ratios, approximately 38 hours of home and community care and support should be made available per eligible recipient over the age of 70.</p> <p>Under scenario 3, approximately 4 full time direct carers would be required to service the ageing population.</p> | <p>The lack of existing aged care services does not currently enable the projected elderly population to age in place.</p> <p>To support the target population trajectory of 1,306, the demand for aged care would require up to 6 aged care workers in Dwellingup by 2036 to provide home and community care services. Despite the diversified scenario providing Greater Dwellingup with more residents than the target population, the age profile resulting from additional local induced population growth suggests the demand for aged care is likely to be 4 full time direct carers, similar to a base case scenario, where the population projection represents an ageing population profile.</p> <p>Considering Greater Dwellingup has a lack of aged care facilities and workers, significant investment would be required to support the population. A growing local workforce is likely to alleviate some of the risks to local operators.</p> |
| Access to health services | <p>There are very limited healthcare services within Greater Dwellingup.</p> <p>Under scenario 3, population estimates there could be demand for one GP for 3.59 days a week by 2026, and one GP for 4.8 days a week by 2036.</p> | <p>The projected population under scenario 3 is likely to demand one GP or remote nursing services to cater for a population of 1360.</p> <p>Under the scenario 3 there would be sufficient demand for a full time GP/remote nursing service within the Dwellingup town site.</p> |



| PEOPLE AND PLACE CHARACTERISTICS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|--|--|--|
| Availability of local employment opportunities | Scenario 3 estimates an additional 49 jobs in Greater Dwellingup by 2026, and 81 by 2036. This provides a total of 130 jobs to the local economy by 2036. | <p>Approximately 95 local jobs need to be realised to support target residential population growth by 2036.</p> <p>Under scenario 3, there could be sufficient economic activity in supporting number of jobs required by the target population.</p> |
| The nature of local amenity (1) | <p>Greater Dwellingup's current retail floorspace is 860m².⁷</p> <p>Under scenario 3 population projections suggest at a high level an additional 1,33m² of population driven retail floorspace could be required to service a population of 1,360 residents in 2036. Therefore, the existing convenience retail offer may struggle to cater for the projected resident population.</p> | <p>It is unlikely there is sufficient vacant floorspace to accommodate 133m² of additional retail within Town to accommodate the projected population^{8&9}.</p> <p>Additional floorspace would have to be identified through re-purposing existing floorspace or by creating new floorspace.</p> |
| The nature of local amenity (2) | <p>The Land Use Employment Survey (technical appendix 3) suggests there is an estimated 2,350m² NLA of commercial floorspace within the study area as of 2017. Approximately 70m² (3%) is vacant.</p> <p>Additional commercial land will be vital in accommodating a range of business that provide amenity to a growing population.</p> | <p>An additional 1,538m² of commercial floorspace for mixed business such as hospitality, retail and healthcare services could be demanded under this scenario.</p> <p>Under scenario 3, there is insufficient commercial land availability to support additional commercial activity to service high levels of population growth.</p> <p>Additional floorspace would have to be identified through re-purposing existing floorspace or by creating new floorspace.</p> |

⁷DPLH Land Use Employment Survey 2017/18

⁸DPLH Land Use Employment Survey 2017/18

⁹Dwellingup Structure Plan 2012

Table 11 - Assessment of Future Scenario 3 – Diversified economy- against vision and goals
Enterprise and economy considerations

| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|--|--|
| Quantifying the economic impact of tourism | <p>Under scenario 3, a diverse and sustainable tourism sector is leveraging a strong creative arts and natural resource management sector to create unique experiences for visitors. This results in an increased visitor spend in Greater Dwellingup of \$31.20m per annum by 2036 and is estimated to support:</p> <ul style="list-style-type: none"> • Additional 27 FTE direct local employment. • Additional 35 FTE indirect local employment. • Additional 79 FTE jobs within Greater Dwellingup. • \$7.75m gross value added to local economy. • \$19.28m output. | <p>Increased tourism visitation alone could almost provide a sufficient amount of jobs to support target population growth, providing a diverse range of bookable experiences and increasing the capture of additional visitor spend with Greater Dwellingup.</p> |
| Quantifying the economic impact of mining | <p>Under all scenarios, mining at Holyoake has the potential to continue to make significant contributions the regional and local economy. This equates to \$717m in output, supporting approximately 4,000 jobs throughout the region by 2036.</p> <p>For Greater Dwellingup, this equates to mining potentially supporting approximately 555 jobs, or \$717m of output by 2036.</p> <p>Currently (2020) compared to mining; tourism, education and training and scientific services contribute 3.88% of Murray’s regional output and 14.1% of employment compared with mining’s 18.67% of output and 11.31% of employment. For these industries to have a comparable economic impact to mining in terms of regional output, they would need to generate 4,400 jobs within the region by 2036.</p> <p>Conflicts between mining and the potential for tourism, natural resource management and disease risk management need to be considered in context of the potential to provide sufficient land to realise economic activity and employment within the study area.</p> | <p>Almost 30% of all mining workers in the Shire of Murray were aged 50 years and old in June 2016. Assuming a similar demographic profile at Holyoake, 130 employees could retire by 2036. Assuming jobs remain available, this presents an opportunity for up to 130 new employees to work at Holyoake.</p> <p>These new employees will not necessarily become Greater Dwellingup residents, considering existing housing constraints and amenity.</p> <p>Perceived conflicts between mining and the potential for tourism and natural resource management will need to be managed as more natural assets become an integral part of Greater Dwellingup’s tourism offer.</p> |



| ENTERPRISE AND ECONOMY CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|--|
| Quantifying the economic impact of agriculture, forestry and fishing | <p>There is currently limited evidence of industry growth or substantial future investment focused on agriculture, forestry and fishing industries.</p> <p>Additional activity on agricultural land is likely to fall under visitor services such as accommodation and food to reflect the trend of producers providing a hospitality-based tourism attraction.</p> <p>Based on this, scenario 3 estimates the following levels of economic activity in these industries within Greater Dwellingup by 2036:</p> <ul style="list-style-type: none"> • 0.17 FTE direct local jobs. • \$0.04m in direct gross value added. • \$0.17m in new direct regional output. | <p>Scenario 3 continues the trend of limited additional future investment focused on agriculture, forestry and fishing industries.</p> <p>As such, low growth in these industries will not be a significant contributor to job creation in Greater Dwellingup.</p> |
| Quantifying the economic impact of natural resource management activities | <p>Under scenario 3, a strong focus on natural resource management has brought additional local research projects tied to the Bushfire Centre of Excellence, bush regeneration, post-mine futures and mine site rehabilitation. This has resulted in new jobs in professional, scientific, technical, public administration, safety and education and training sectors. Positive flow on effects are also experienced within the visitor economy through the growth of nature, education, and Indigenous based experiences.</p> <p>Based on this, scenario 3 estimates the following high growth in these industries by 2036 that equates to:</p> <ul style="list-style-type: none"> • 26 additional direct jobs FTE. • \$3.3m of additional gross value added. • \$5.8m of additional output to the regional economy. | <p>Natural resource management and nature-based tourism focus is likely to enhance the role that environment and culture plays in Greater Dwellingup's heritage characteristics and will be a significant contributor to population growth and job creation in Greater Dwellingup.</p> |

Table 12 - Assessment of Future Scenario 3 – Diversified economy- against vision and goals
Environment, arts, culture and heritage considerations

| ENVIRONMENT, ARTS, CULTURE AND HERITAGE CONSIDERATIONS | FINDINGS | IMPLICATIONS FOR VISION AND GOALS |
|---|---|--|
| <p>The value of Dwellingup's natural environment for visitation</p> | <p>Under scenario 3, Greater Dwellingup's natural environment offer is not invested in beyond the current planned activities.</p> <p>Significant conflicts are likely to remain in multiple use State Forest areas that surround the town site, with competing demands between mining, tourism.</p> <p>The proposed mine site at Holyoake could impact recreation and conservation sites that could be utilised for natural resource management, including:</p> <ul style="list-style-type: none"> • Etmilyn • Plavins • Inglehope • Amphion Chadoora | <p>In scenario 3, Greater Dwellingup's ability to make most out of its best natural assets may potentially be compromised by a lack of investment (beyond what is currently planned) in industries supporting the natural environment. This includes the potential to drive additional visitation through nature and education-based tourism experiences, as well as Indigenous tourism experiences.</p> |

It is important to note that the Environmental Protection Act (1986) continues to be the statutory mechanism through which issues concerning the environment will be addressed.



The diversified economy scenario represents a future where Greater Dwellingup is most likely to realise the vision set by the community, which is, one where small-town charm is maintained while self-sufficiency and sustainability are increased through the provision of community-oriented services (i.e. childcare, schooling, aged-care, health-care and dwellings for permanent residents).

This is largely due to growth in activities aligning with the vision statement, as well as a strong and diverse tourism sector that leverages opportunities to collaborate on creative arts, nature, education, and Indigenous based tourism experiences.

Growth experienced under scenario 3 provides an opportunity to mitigate the risks of the demand for short stay accommodation overwhelming local housing stocks. It also allows for more diverse food, retail, arts and hospitality offers to grow and attract different visitor segments. This suggests future projects need to be targeted towards ensuring Greater Dwellingup has the right tools to realise natural resource management and tourism could provide up to 130 additional jobs if 75% of the tourism expenditure is captured within the study area.



Image courtesy of Josh Cowling



11. KEY FINDINGS

The key findings section tests the implications of the overall findings from the scenario analysis undertaken against the Roadmap's goals (also outlined on page 16, Part 1). A high-level assessment of each scenario against the community's goals is provided in tables 13–16 and is accompanied by key findings of the Roadmap.

Goal 1: Maintain our small-town charm so that Greater Dwellingup will be an attractive, interesting place that is self-sufficient in the services it offers families.

Table 13 – Scenario evaluation

| GOAL | BUSINESS AS USUAL | ADVENTURE TOURISM TOWN | DIVERSIFIED ECONOMY |
|---|--|---|---|
| Maintain our small-town charm so that Greater Dwellingup will be an attractive, interesting place that is self-sufficient in the services it offers families. | High risk of not being achieved. Sufficient population growth in families not supported by sufficient local employment opportunities. | High risk of not being achieved. Short stay accommodation demand presents a better return on investment than rentals for permanent residents offsetting potential increases in housing supply. | Risk of not being achieved. Lack of new residential housing supply limits population growth ability. |

KEY FINDINGS

1. The provision of services in regional communities is critical to sustaining a permanent residential population in Greater Dwellingup. Communities that lose or do not attract services are exposed to a decline in residential population, which in turn leads to more services being vulnerable to being shut down.

Greater Dwellingup is potentially exposed to this, in particular through the potential for investors to realise returns on investment in local housing as short-stay holiday accommodation, resulting in Greater Dwellingup housing stock being bought and used for these purposes, and therefore less stock being available for existing or future residents.

2. Greater Dwellingup's permanent residential population will need to grow to support the sustainable provision of services required to ensure Greater Dwellingup remains a self-sufficient place for residents to live at all stages of life. Analysis undertaken suggests that this growth should target a residential population of 980 by 2026, and 1,232 by 2036.
3. Attraction and retention of the above residential population in Greater Dwellingup to support the preservation and growth in services will rely on a combination of local economic development and growth in employment opportunities in greater Peel. Of course, local jobs (in Greater Dwellingup) are considered more desirable as they are more likely to have greater flow on impacts on the economy, and support residents to have greater opportunities to be involved in their community. On this basis, scenario analysis estimates that approximately 95 local jobs would need to be realised to support target residential population, assuming that the existing employment self-containment remains at 40.7% of the total workforce.
4. Residential population growth will only be possible if two key issues are resolved:
 - Provision of new residential accommodation to house approximately 280 households. This supply needs to include both rental and owner/occupier supply to support choice; and
 - Mitigation of the impacts of casual short-stay accommodation crowding out the residential population, in particular those relying on the supply of rentals.
5. Normal market knowledge or behaviours in the attraction of population amenities such as childcare and NDIS services can be different in regional communities such as Dwellingup compared to metropolitan areas of Perth. Operators will seek best impact against investment (whether that is mission or profit based) for a given risk profile. Risk can be a big issue, in particular the availability of skilled workers to deliver services.

As such, there is potentially a significant role for Dwellingup Futures to play in supporting the realisation of service delivery that addresses the following needs:

- Provision of 12 childcare places to 2026 and 18 places to 2036. This equates to local employment opportunities for 2.5 childcare workers to 2026 and 3.75 to 2036;
 - Provision of an average of 250 hours of home and community care support per week for 160 ageing Greater Dwellingup residents by 2026, and 315 hours of home and community care support for 205 ageing Greater Dwellingup residents by 2036; and
 - Provision of 3.71 days per week for GP/remote nursing services in Greater Dwellingup by 2026, with an additional 4.66 days per week by 2036.
6. Significant population growth within and around Greater Dwellingup will need to be undertaken deliberately, with critical consideration for retention of Greater Dwellingup's character. The community have been clear that some residents would prioritise character over population growth, meaning that attention needs to be given to provide assurance over amenity impacts prior to formal planning reforms being put in place.
 7. Bushfire remains and will always represent an existential threat to Greater Dwellingup and its surrounds. The implementation of findings from the Ferguson Review of the 2016 Yarloop Fire, and national implications of the 2019-20 bushfire season in Australia's eastern states has resulted in an increased focus on the management of bushfire risks in existing and new developments and settlements. This now means that any new development will be subject to stringent assessment, after which there may be no option to proceed. Engagement with decision-makers to understand implications of evolving bushfire management practices and statutory processes will be critical if the vision and goals for Greater Dwellingup are to be realised.

Goal 2. Grow a diverse and resilient economy to offer more pathways for local jobs and career opportunities

Table 14 – Scenario evaluation

| GOAL | BUSINESS AS USUAL | ADVENTURE TOURISM TOWN | DIVERSIFIED ECONOMY |
|---|---|--|--|
| Grow a diverse and resilient economy to offer more pathways for local jobs and career opportunities | Moderate – some opportunities to achieve this goal. | High – significant opportunity to achieve this goal. | High – significant opportunity to achieve this goal. |

KEY FINDINGS

1. Growth in net new local employment opportunities will largely be focussed on servicing the growing tourism sector. The scale and configuration of this employment will depend on the characteristics of the tourism offer (e.g. adventure, arts, food etc.), and the proportion of visitors who are day visitors and/or overnight visitors. Scenarios 2 and 3 suggest that, based upon visitation assumptions, there would be between 79 and 130 additional direct, indirect, and induced jobs resulting from new tourism activities. This includes estimates of additional retail employment that, despite being supported by residential population growth, would be underpinned by demand from the expanded visitor expenditure.
2. Mining has been considered as a constant across all scenarios with no net new Peel employment assumed, but with jobs moving into the study area via Alcoa's Holyoake expansion in 2030. Mining continues to represent a significant employment source for new Greater Dwellingup residents.
3. With the mining workforce's ageing population (with 33% over 55 years of age) there is an opportunity for a new generation of

workers to take up employment as older workers retire. This is especially the case as bauxite mining's operational model means that impacts from automation are likely to be lower than in open cut mines operating in other parts of Western Australia.

4. Overall, the scenario analysis suggests that it would be possible for scenario 3 to provide the additional 95 jobs required to maintain additional jobs required to support the target residential population (including potential NRM and arts-related employment discussed under Goal 3). Given that some residents will work outside of the study area, for the target population to be realised, 225 additional Greater Dwellingup residents would be expected to find employment outside of the study area. In a post-COVID context this may mean that residents still potentially work part or full-time in Greater Dwellingup with virtual connectivity to their main place of employment.
5. This means that Greater Dwellingup's employment self-containment would shift from 40.7% to 36%.

Goal 3. Protect and capitalise on our assets through education, creativity, cultural awareness and a scientific approach

Table 15 – Scenario evaluation

| GOAL | BUSINESS AS USUAL | ADVENTURE TOURISM TOWN | DIVERSIFIED ECONOMY |
|--|---|---|--|
| Protect and capitalise on our assets through education, creativity, cultural awareness and a scientific approach | Neutral – Negligible opportunities to reach this goal | Moderately high – Some opportunities to reach this goal | High – Significant opportunities reach this goal |

KEY FINDINGS

1. Natural resource management represents a small but unique opportunity for Greater Dwellingup, leveraging natural assets and an extensive local knowledge base. Future local job growth in this sector is possible but will be dependent upon:
 - Decision of key research and NRM agencies including DBCA, research universities etc to support and invest in Greater Dwellingup; and
 - Local entrepreneurial ability to capitalise on assets to develop products for the education and tourism markets.
2. Scenario analysis highlighted an opportunity for Greater Dwellingup's burgeoning arts and recreation sector with its already nationally recognised artisans living, producing and displaying high quality art in Greater Dwellingup. Scenario analysis identified a significant opportunity to grow this sector, in particular under scenarios where growth was in day-visitation and based upon a diverse visitor segments and interests. Scenarios estimated the potential growth in this sector of being between an additional 2 and 13 direct jobs by 2026, and 9 to 24 jobs by 2036.

3. Target population will require future work to investigate place-based initiatives to activate the Dwellingup town site and to create an active and vibrant place that is attractive to creative producers and its consumers.



Goal 4. Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities

Table 6 – Scenario evaluation

| GOAL | BUSINESS AS USUAL | ADVENTURE TOURISM TOWN | DIVERSIFIED ECONOMY |
|---|--------------------------------------|--------------------------------------|---------------------------------|
| Protect and enhance Greater Dwellingup's environment by sensitively managing diverse land-use activities (such as mining, forestry, tourism, agriculture and recreation). | High Risk of goal not being achieved | High Risk of goal not being achieved | Risk of goal not being achieved |

KEY FINDINGS

- Land use conflicts with industry are highly likely in all scenarios as Holyoake has assumed to become operational by approximately 2030, with mining potentially impacting upon areas identified by communities and assessed through instruments of government as having high conservation value, as well as adjacent private landholdings. Impacts will likely be related to approximately 4,000ha of land in the Study Area's North-East where the Holyoake investigation area interacts directly with the Dwellingup Protection Group's proposed Dwellingup Discovery Forest Management Zones 4 and 5 and the adjacent Management Zones 3 and 6.
- Impacts of rapid expansion in adventure tourism activities will need to be acknowledged and managed proactively, with the impacts of an additional 63,000 overnight visitors, and 42,000 day visitors on Greater Dwellingup's hiking and mountain biking trails, campsites, and natural environment. These impacts are particularly likely to be felt in and around Lane Poole Reserve, Turner Hill and the town trail infrastructure.
- The scale and degree of impact of both mining and expanded tourism on the natural environment and Greater Dwellingup's amenity are not agreed amongst stakeholders and are uncertain at this point due to a number of factors including:
 - Uncertainty over the ultimate utilisation of areas identified by Alcoa for investigation;
 - Time required by Alcoa and decision makers to investigate, collate and report on environmental assets and impacts;
 - Informal nature of adventure-based visitation, in particular day visitors; and
 - Changes in the risk profile of activities as the environment adapts to a warming and drying climate.
- If mining were to cease to exist approximately 3,200 and 4,400 additional jobs in tourism and NRM within the region would be required to maintain a comparable level of economic activity. This suggests that an additional tourism spend of approximately \$650m or an additional 7.73m annual visitors would be required to replace mining within the Murray region.

5. The Dwellingup Futures group has a significant role to play in supporting industry and community in dealing with the challenges associated with uncertain impacts and frustrations related to the incongruent nature of the planning being undertaken and communicating and understanding key impacts. This role may include elements such as:

- Coordinated communications that contribute to statutory processes and timeframes;
- Development of agreed approaches to impact monitoring and management; and
- Development of an aligned view on priority areas for retention, protection and/or utilisation by industry.

Dwellingup Futures Roadmap Part II: Implementation Pathway sets out a plan for how Greater Dwellingup and its partners can work together realise the vision and goals described in Part 1 of the Roadmap. Part II addresses the fifth goal of the Roadmap “The community, government and industry cooperatively work together to achieve the goals of the Dwellingup Futures Roadmap.”

