

FREMANTLE

as a re-connected city

a FACTBase Special Report



THE UNIVERSITY OF
**WESTERN
AUSTRALIA**

ABOUT FACTBase

FACTBase is a collaborative research project between the Committee for Perth and The University of Western Australia to benchmark the liveability of Perth and its global connectedness through an examination of Perth's economic, social, demographic and political character.

The FACTBase team of academics and researchers condense a plethora of existing information and databases on the major themes, map what is happening in Perth in pictures as well as words, and examine how Perth compares with, and connects to, other cities around the world.

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FOREWORD



Marion Fulker
Chief Executive Officer
Committee for Perth
Project Director, Future Freo

This report is a result of our Future Freo project and examines Greater Fremantle's evolving role in the Perth metropolitan region. It identifies the characteristics and unique competitive advantages that Fremantle can build upon to develop a distinctive and inventive future that connects with its extraordinary past.

The report is the fourth of our FACTBase Special Reports and focuses on the Greater Fremantle region. It amalgamates quantitative and qualitative data with historical, social and economic research to track Fremantle's evolution from before settlement to today. It provides an evidence base from which genuine and strategic opportunities have been identified to ensure the Fremantle region has a bright future.

The report identifies Greater Fremantle as Western Australia's undervalued treasure. While its strategic location at the mouth of the Swan River has attracted people and facilitated trade for thousands of years, in its recent history Fremantle's story is one of an area bypassed.

Yet for Fremantle, this bypass has a considerable silver lining. While investment and development has been focused elsewhere in the Perth region, Fremantle has been able to retain much of its architectural and social heritage, developed a distinctive character and charm, and established itself as a small yet vibrant hub of knowledge.

The result is that today Fremantle sits on the precipice of significant opportunity, and we hope that this report will herald a new and exciting era for Fremantle as Perth region's second city.

The Future Freo Steering Committee has overseen the development of this report. It is comprised of a cross-sectoral group of Fremantle's leaders from academia, business, local and State governments. As the Future Freo project draws to a close, it is now over to this group to engage with the region's stakeholders to ensure that Fremantle maximises all of its opportunities to realise a bright and prosperous future.



Adrian Fini, OAM
Director, FJM Property
Chair, Future Freo Steering
Committee

Chairing the Future Freo Steering Committee has been an interesting and enjoyable process. What this report reveals is that Greater Fremantle's future, lies in its past. The Port city has a history that stretches back tens of thousands of years and while most of us might have a much more recent connection to it, the ties are strong.

The thinking behind the Future Freo project was that while Fremantle has a rich history, we also wanted to ensure that it has a vibrant and sustainable future. That's why the researchers have focused on gaining an understanding of the economic prosperity, liveability and lifestyle of the Greater Fremantle region.

Over the past year, four separate reports have been produced that study Greater Fremantle's economic, social, demographic and political character. A review of community perceptions has also been undertaken and each prevailing perspective has been checked against what the evidence tells us. All of this work has uncovered interesting facts about the region and highlighted its strengths and weaknesses as well as its opportunities and challenges.

This report offers strategies for the future so that Greater Fremantle can prosper as Perth's pre-eminent second city and be re-connected in our hearts and minds.

I would like to thank all of the companies and local governments that helped to fund the Future Freo project and their leaders who contributed their time and intellect as members of the Steering Committee.

As a substantive piece of independent and objective research, I hope that this FACTBase Special Report: *Fremantle as a re-connected city* is a beacon for all. Not just for the policy and decision makers in State Government and local governments but for the community too. While many challenges may lie ahead for Greater Fremantle, there is no doubt that the opportunities are abundant.

EXECUTIVE SUMMARY



This special report provides an assessment of the economic, social and cultural transformation of Greater Fremantle. It considers the change that has occurred in Fremantle in the context of change in the wider Perth metropolitan and Peel region. In doing so, it identifies Fremantle's most distinctive advantages and the critical strategic issues, options and challenges for the future.

The report does not intend to provide prescriptive guidance for Fremantle's strategic direction. Rather it outlines genuine, evidence-based strategic options for consideration by the local and regional community and local and State governments.

It identifies Greater Fremantle as an undervalued regional and State asset – a unique regional centre whose economic, social, and cultural development and character has been strongly influenced by its strategic location at the junction of the Indian Ocean and the Swan River.

The report finds that, while Greater Fremantle continues to fulfil a critical strategic transportation and economic function for the State, the regional influence

of the area has diminished over recent decades as new urban centres emerged and Fremantle faced greater competition for retail trade, investment and political attention.

It is also apparent that Greater Fremantle did not share in the growth experienced in the Perth metropolitan and Peel region as a result of the most recent resources boom. The population increased only marginally and, while there were high numbers of in-migrants, this was largely countered by out-migration.

The region is, of course, recognised as a place of considerable ethnic diversity and for its multicultural identity. This is linked in part to the Port's key role as a point of arrival for many new migrants, but also the rich history of ethnic settlement in Fremantle. This has shaped local cultures, key social institutions and the economy.

The report also shows that, from a socio-economic perspective, there is a relatively high degree of spatial equality across the Greater Fremantle region when compared to the Perth metropolitan and Peel region. However, the relatively high cost of housing is a source of economic stress.

Indeed, one of the key challenges for Fremantle is the level of diversity and affordability of housing.

In terms of the economy, it is clear that Greater Fremantle has a dynamic economy with particular strengths in transport and related industries, the arts and recreational services, accommodation and food and health care. Yet it is also clear that major investment has been difficult to attract. The result is that the most significant period of investment in Fremantle's city centre over the past half century was not precipitated by regional population and economic growth, but by Fremantle's role as host city for Australia's 1987 America's Cup defence and the establishment of Notre Dame University in the historic West End.

It would appear that part of the challenge directly relates to aspects of local competitiveness. While Fremantle has industries that are performing well in broad terms, the analysis undertaken here suggests that success is constrained by local factors. The exact nature of these needs further investigation and detailed attention by policy-makers and the private sector if Fremantle is to reach its full potential.

One of the most critical industries for Fremantle remains its Port. It is essential

in linking the global economy with Western Australia, and is an important creator of jobs and new economic opportunities. Long-term planning to ensure the efficiency and competitiveness of the Port are essential for the prosperity of Fremantle. Importantly, the Port is critical to the character and heritage of Fremantle, and helps to create a unique identity.

Indeed, the character and identity built on heritage is central to the future of Fremantle. There is significant potential to heighten awareness and attract residents, businesses and visitors through Fremantle's diverse and unique heritage stories; historic-built heritage form and street patterns; and pivotal role in regional Indigenous history as well as the migration and military heritage of modern Australia.

Furthermore, the report indicates that, while some traditional sectors including tourism and entertainment face increased regional competition, Greater Fremantle's profile, heritage strengths and character provide considerable potential for appropriate policy intervention to facilitate future growth and revitalisation. The city is globally recognised as a 'must see' destination,

which presents an opportunity to capitalise on this profile. Recent growth of the cruise ship industry is also identified as a substantial opportunity for Fremantle's tourism and hospitality sector.

One of the other areas of strength is in knowledge and creativity. Globally, these sectors are seen as being critical to urban regeneration and growth, and Fremantle is extremely well-positioned to capitalise on these sectors. Notre Dame University provides intellectual capital and is a major attractor to Fremantle for young people, while a number of creative industries are also present, such as media and the arts. Collectively, these provide the 'buzz' that promotes innovation, growth and a vibrant urban experience.

There is also strength in the health services and related sectors. This is important not only to broader notions of liveability, but to employment and innovation. While the health sector is facing challenges associated with the diminished role of Fremantle Hospital, it is clear that this is a sector that is still important to the future of the city.

A summary of the key findings about opportunities for the future is then outlined.

FREMANTLE AS A RE-CONNECTED CITY



INTRODUCTION

Fremantle is one of Australia's iconic urban centres. The combination of its diverse and changing economy, port history, built environment and cultural diversity have created a place with a unique identity and set of natural advantages. Indeed, in late 2015, the *Lonely Planet* travel guide identified Fremantle as one of the top 10 cities to visit in the world, pointing to its harbour and heritage architecture, food culture, and vibrant entertainment and nightlife (Acott, 2015).

Fremantle is home to one of Australia's most important ports, acting as a key articulation point between Western Australia's metropolitan and regional economies. The Port is critical to the State's economy and is central to Fremantle's identity.

Yet Fremantle is not without its challenges. Within the context of a rapidly growing metropolitan region, investors, potential new residents and visitors often bypass Fremantle.

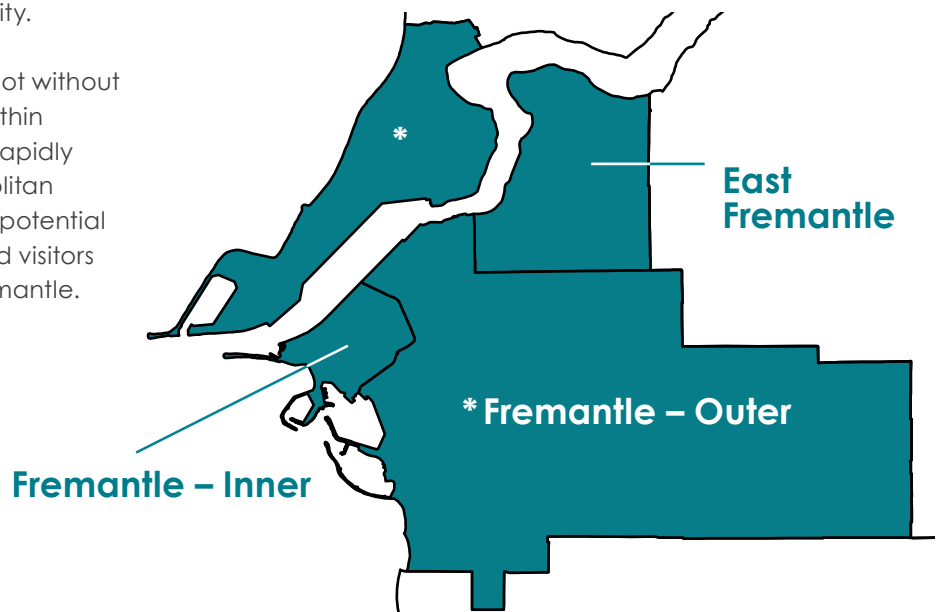
In large part, this is because of the growing complexity and number of competitor locations that Fremantle contends with as well as challenges with transport connectivity and efficiency.

Against this background, it is important that Fremantle is able to interpret its position within the urban mosaic and is able to capitalise on its diverse potential.

This report traces the dynamics of change in Fremantle, starting with the changing strategic role and influence of Fremantle within a polycentric city, before moving on to examine its shifting demography, socio-economic characteristics, and employment and economic structures.

It then turns to a discussion about the future, focusing on Fremantle's unique strengths and opportunities. These are numerous, and include heritage and culture, tourism and entertainment, education, knowledge and creativity, and the broader sense of urban vitality and liveability.

In terms of spatial coverage, our focus is the Greater Fremantle region, comprised of East Fremantle, Fremantle – Inner and Fremantle – Outer statistical local areas. Importantly, the document aims not to offer a prescriptive roadmap or set of recommendations, but rather stimulate discussion and debate, and catalyse action towards a strategic direction for Fremantle's future.



FREMANTLE IN A POLYCENTRIC CITY

DEVELOPMENT AND STRATEGIC INFLUENCE



Fremantle has long been critical to the Western Australian economy through its role as a strategic transport hub. While its capabilities were less than optimal prior to start of the 20th century, the discovery of gold near Kalgoorlie in the 1890s transformed the State's economic landscape and led to the deepening of Fremantle Harbour and major investments in the Port facilities. The opening of Fremantle's Inner Harbour in

1897 signalled that the State was 'ready for business' and able to connect with the world economy.

The rapid expansion of the Western Australian economy between the 1890s and 1930s saw the Port play a critical role in the State's international trade relations. Not only did it act as the key arrival point for imports, it had a critical export function. This was particularly important for the expanding agricultural

industry, which had long struggled with an inefficient and expensive transport system. Key commodities exported through Fremantle included wool, wheat, barley and even sandalwood.

The Second World War emphasised Fremantle's international maritime significance with the harbour providing berth to Australian and allied vessels on active duty in the Indian Ocean region. The War also gave further impetus to Fremantle's shipbuilding industry, which had begun to develop as an industry of some scale in North Fremantle from about 1910. The War effort saw this up-scaled, with the establishment of the State Shipbuilding Yard in North Fremantle in 1943. The primary purpose of this enterprise was the construction of steel barges that were used as fenders for naval vessels.

The shipbuilding industry was just one part of a vibrant manufacturing economy that concentrated around the confluence of port, road and rail

infrastructure in Fremantle. The largest concentration of manufacturing firms prior to the mid 1950s were in the North Fremantle and Mosman Park area, and included the State Implement and Engineering Works, Colonial Sugar Refinery, and assembly plants for Ford and General Motors vehicles. These industrial activities emerged prior to the First World War and peaked during the 1950s and early 1960s.

Fremantle's historical economic significance was not simply linked to its role as a transport hub for commodities and manufactured goods. It was one of the most important gateways for the flow of people, and played a critical role in Australia's migration history. From the start of the 20th century, it was the key port of arrival for most migrants, and while the source of arrivals was initially the United Kingdom, by the 1950s, arrivals were a diverse range of settlers from across Europe.

The late 1960s and early 1970s was a period of turmoil for the Fremantle region. The contraction of manufacturing in the face of global competition and restructuring resulted in the loss of jobs across the sector. Its role as a transport hub for passengers also diminished as increasingly affordable air travel saw its 1960s peak of 200,000 persons per

year gradually dwindle. Even more significant were the decreasing labour requirements in the Port as more efficient cargo handling technologies emerged and workplace practices were reformed. At the wider regional scale, the impacts of this were countered to some degree by significant industrial development further south, with the establishment of the BP refinery in Kwinana in the mid-1950s and the extension of Fremantle Ports Outer Harbour into Cockburn Sound. The expanded Port became a critical hub in the trade of crude oil and refined petroleum products. It also enhanced competitiveness across a range of other sectors and acted as a catalyst for other key industries, notably alumina, nickel, bulk grain and defence facilities.

The 1980s saw Fremantle's longstanding connection with the boat and shipbuilding industry help contribute to a major period of revitalisation. The local construction of Australia II that went on to win the America's Cup formed the basis for a major economic transformation across two key sectors. First, the hosting of the America's Cup in 1986/87 saw Fremantle reinvigorate its skill base in shipbuilding that led to the formation of a number of new firms, including Austal – now based at



Henderson, and one of the biggest ship builders in the world. Second, it allowed Fremantle to reimagine itself as a vibrant tourism and entertainment port city, sparking mass public and private regeneration investment in its marine facilities and city centre. A more recent resurgence in the cruise ship tourism industry has created further economic opportunities as a destination for international and domestic luxury liners.

Yet it is also clear that shifting economic, social and demographic dynamics are again posing challenges for Fremantle. It retains an important strategic economic role within the State, but new technologies, shifting consumption behaviours, and increasing competition from other urban localities all mean that Fremantle needs to again reimagine its future direction within the context of the wider metropolitan environment.

CHANGING ROLE WITHIN THE URBAN MOSAIC

Fremantle's role within Perth's wider urban system has changed quite dramatically over its history. The metropolitan region has shifted from a tightly-formed conurban structure linking Fremantle, Perth and Midland in the 19th century, to having a more defined north-south orientation with numerous competing regional employment and retail centres. This is evident in the evolution of the metropolitan region's planning strategies from the 1950s.

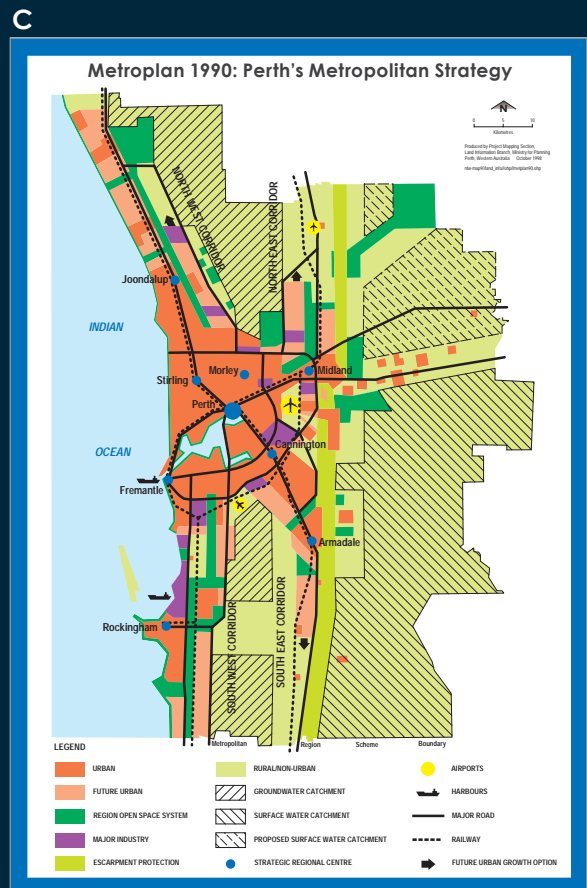
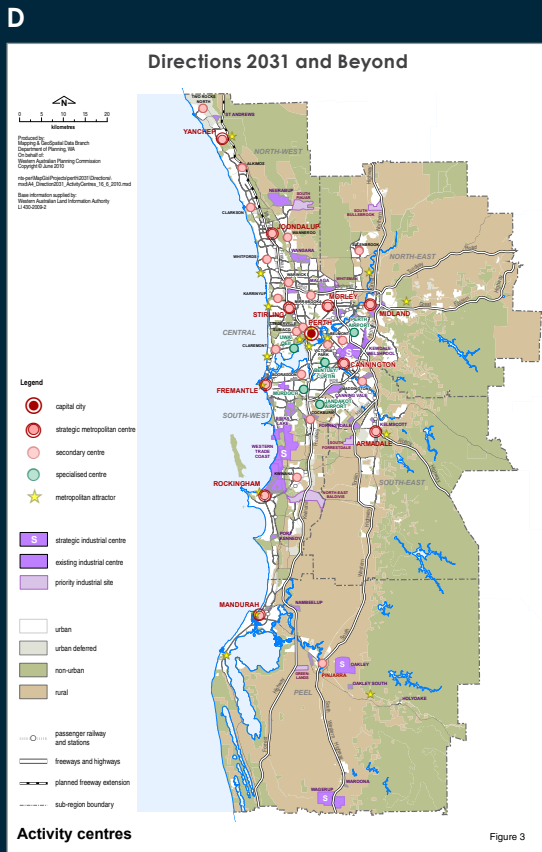
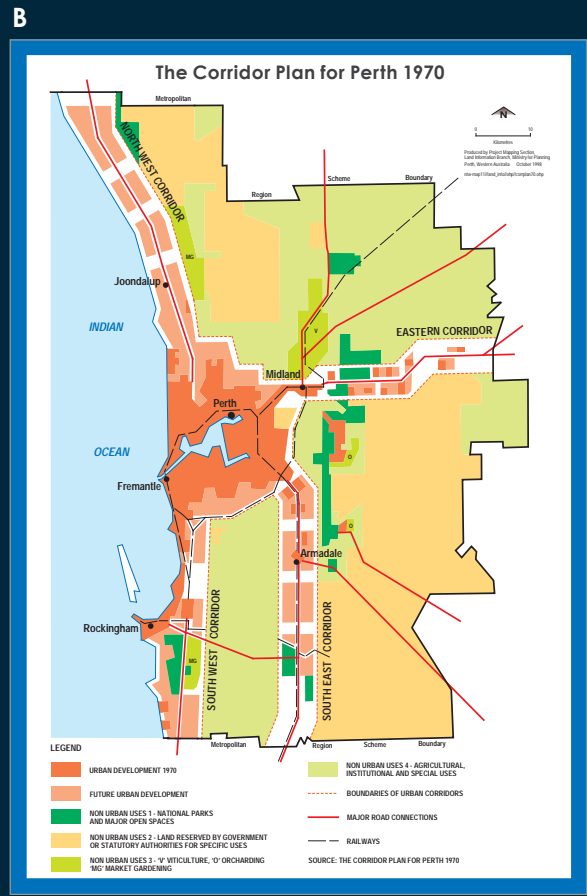
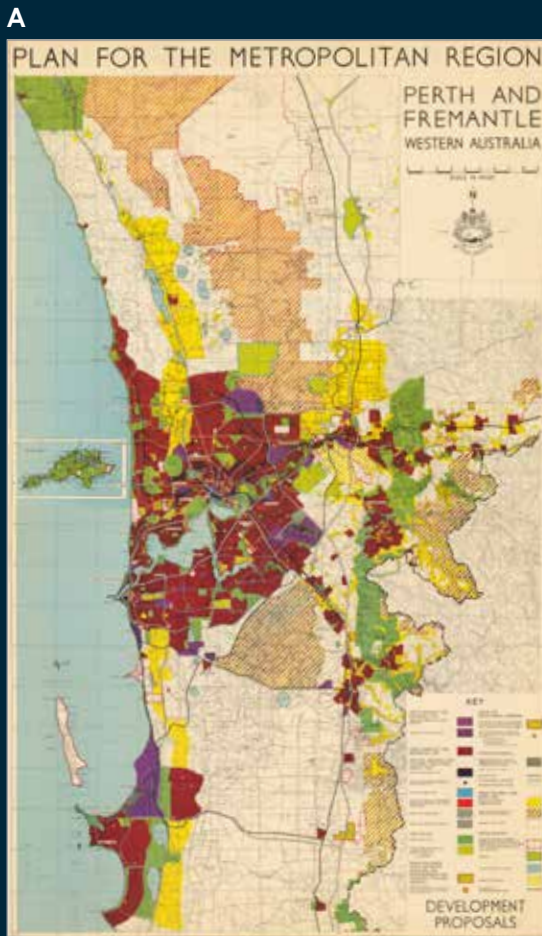
In 1955, Perth's population reached approximately 400,000 people, and in response to steady growth and the need for a more coherent approach to spatial development, the Stephenson-Hepburn metropolitan structure plan (A) was implemented. The plan envisioned that 1.4 million people would tightly cluster around a Fremantle-Perth corridor. However, a strong desire to fulfil the 'Australian dream' of a house on a suburban block, along with an increasing number of households with cars, created pressure for expansion. The 1970s Corridor Plan (B) helped reshape the geography of Perth through four strategic urban growth corridors.

This effectively placed Perth City at the core of the metropolitan area. Critical to this was the development or expansion of a number of new or existing suburban nodes, including Joondalup, Armadale and Rockingham. Fremantle was still a key component of this urban system, but it was clear that new centres would emerge as alternatives and possible competitors.

In 1990, Metroplan (C) was implemented for a projected two million population base, by widening out the corridors and strengthening north-south routes with the addition of a north-east corridor. This was in part in response to the lower development cost-per-hectare along the sandy coastal plain compared to the granite and clay of the scarp. Eight strategic employment centres were planned to alleviate commuting pressure to Perth and provide functionality to the corridor structure. This further expanded the number of urban nodes and, in relative terms at least, diminished Fremantle's regional significance.

The most recent 2010 plan, Directions 2031 and Beyond (D), with ten strategic metropolitan centres, aims to accommodate 2.2 million and later 3.5 million. Its inclusion of the Peel Region reinforced the geographic shift of the metropolitan north-south axis. While Fremantle is still an important urban node within the context of the most recent plans, it is now one of many regional centres within the urban mosaic, competing for investment, political focus, regional trade and tourism.

It is also clear that there are other significant policy challenges facing Fremantle within the context of a dynamic urban mosaic. One of the key issues relates to transport, where the development of an effective mass transit network that integrates Fremantle into the wider urban system in a sustainable way is an ongoing source of policy dialogue. This has the potential not only to improve economic efficiency, but also liveability and sustainability within the region.



Images courtesy of Western Australian Planning Commission

FREMANTLE AS A RE-CONNECTED CITY



SHIFTING REGIONAL ROLE

DEMOGRAPHIC CHANGE

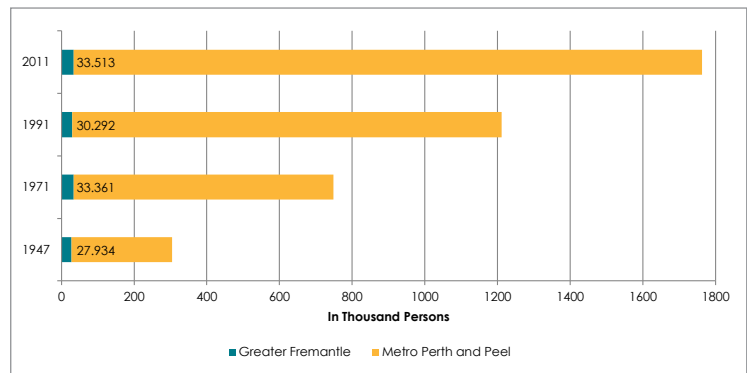
Given the changing structure and role of Fremantle within the wider Perth metropolitan region, it is important to get a sense of population dynamics over a substantive part of its history. Indeed, using the 1947 census as a starting point, what is revealed is a place that has undergone periods of quite gradual change, as well as some periods that were clearly tumultuous and transformative.

Population Change

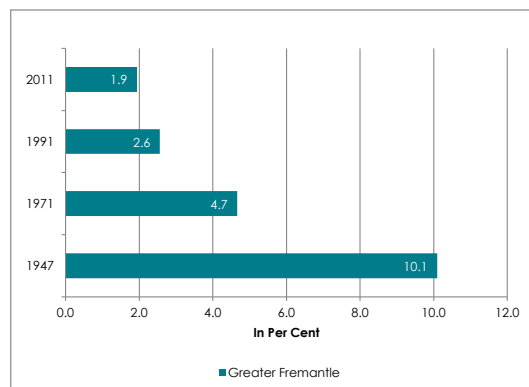
In 1947, the three statistical local areas that comprise the Greater Fremantle Region had a total population of 27,934 (Figure 1A). By 2011, this had increased by just 5,579 people to 33,513 (Figure 1A). This suggests a relative degree of stability, but closer inspection of data for the 1971 and 1991 censuses reveals considerable change across the period. The population increased between 1947 and 1971, when it stood at 33,361, but fell between 1971 and 1991 to 30,292. The decline was in large part linked to the decreasing labour requirements in the Port as well as the loss of some manufacturing and other activities from the area.

FIGURES 1A AND 1B: TOTAL POPULATION, GREATER FREMANTLE AND METRO PERTH AND PEEL, 1947, 1971, 1991 AND 2011

1A



1B



The 1991-2011 period saw a turnaround, with growth of 10.6 per cent growth over 20 years, 0.5 per cent per annum.

Intriguingly, the resource boom of the past decade had only a modest effect on Fremantle. The population in Greater Fremantle increased from 30,965 in

2001 to 33,513 in 2011; a rise of 8.2 per cent. In overall terms, this was much slower than for the Perth metropolitan area over the same period, which increased from 1.34 million to 1.73 million; an increase of 29.4 per cent.

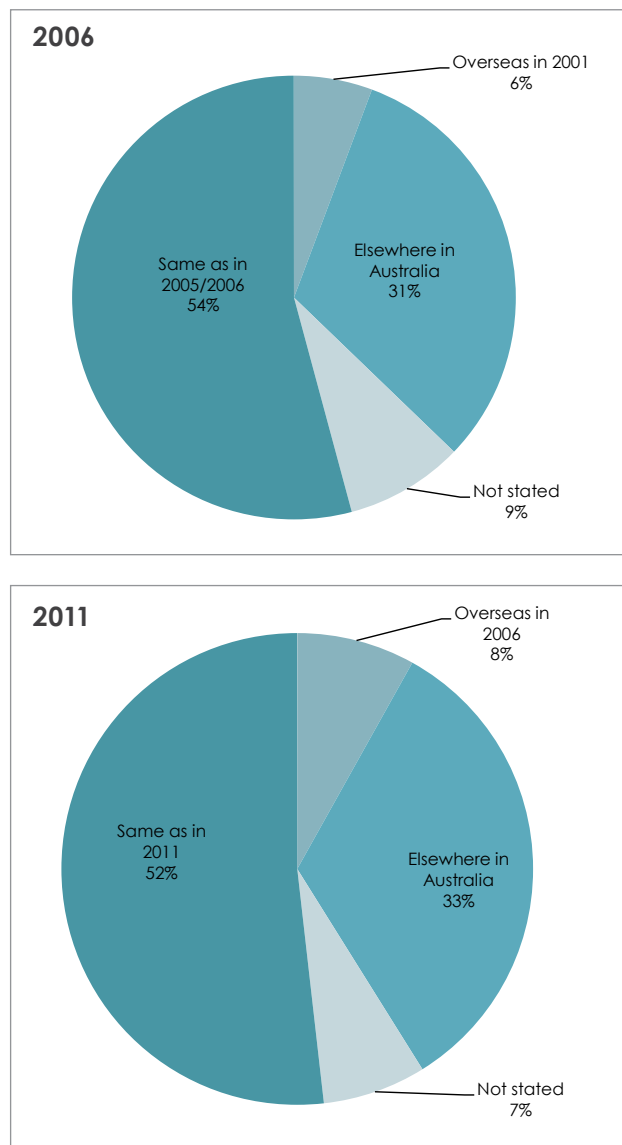
The modest rates of population growth in Fremantle compared to the Perth metropolitan region as a whole is also reflected in Figures 1A and 1B. This picks up a theme in the previous section and shows that Greater Fremantle accounted for only 1.9 per cent of Metro Perth and Peel's total population in 2011; a far cry from 1947 when it accounted for 10.1 per cent of the total metropolitan population.

Migration

While the population appears to be very stable, the reality is that there is a relatively high degree of turnover. Figure 2 shows that nearly half of all residents in Fremantle lived at a different address in the five years prior to both the 2006 and 2011 censuses. It also shows the former location of those who have moved to Fremantle, showing a slight increase in the number settling from overseas and elsewhere in Australia.

In terms of socio-demographic characteristics (see Figure 3), the majority of those who lived in Greater Fremantle five years ago and those who lived elsewhere or were overseas in 2006 were of working age. There is, however, a higher proportion of the working age population in these groups, 81 per cent and 90 per cent, respectively. The 25-39

FIGURE 2: USUAL ADDRESS FIVE YEARS AGO, GREATER FREMANTLE, 2006 AND 2011



year old cohorts were also predominant among those who lived in other areas five years ago while those who lived in the same address were mostly in the 50-64 age cohorts. The Greater Fremantle region was attractive to more highly-educated migrants, both internal and overseas, and those who were married.

All of this helps to emphasise the continued attractiveness of Fremantle as a residential location. However, with nearly half of all residents arriving and departing during any given five-year period, it also suggests that ensuring Fremantle remains a 'destination of choice' is critical.

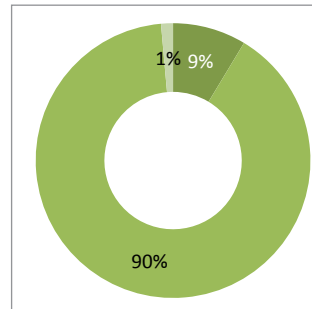
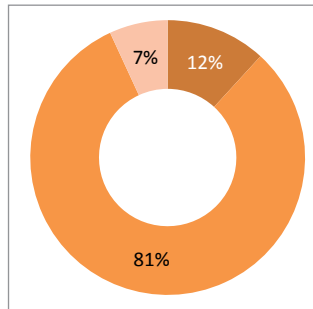
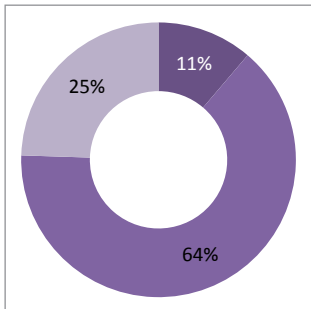
FIGURE 3: SOCIO-DEMOGRAPHIC CHARACTERISTICS OF GREATER FREMANTLE RESIDENTS, 2011

Same address as in 2011

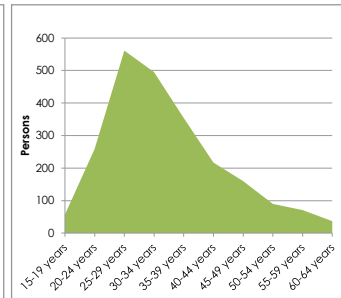
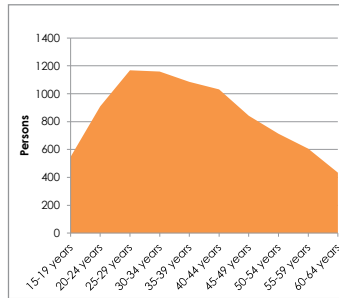
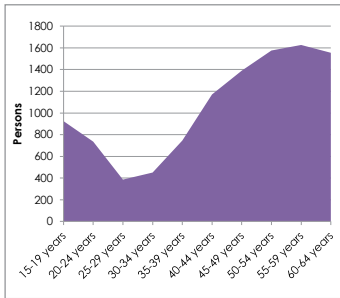
Elsewhere in Australia in 2006

Overseas in 2006

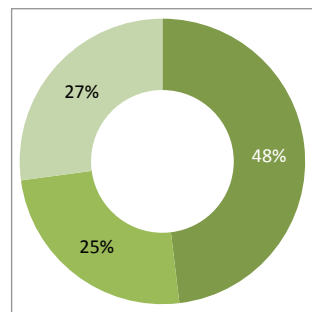
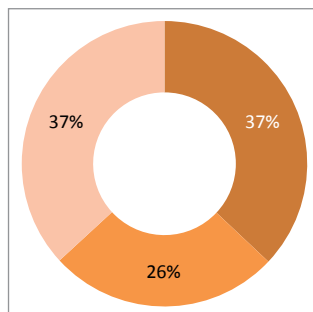
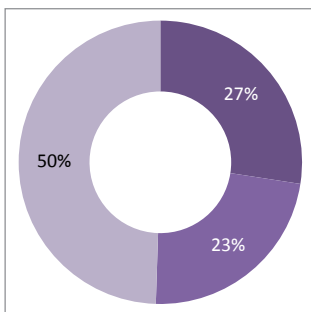
By Age



0-14 Years
15-64 Years
65 Years and Over

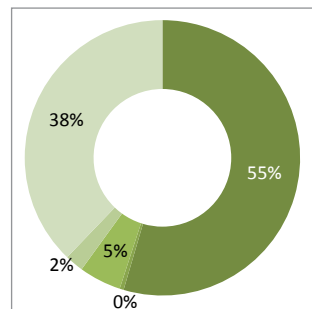
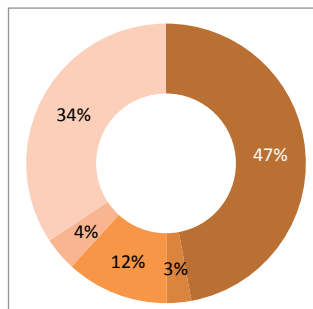
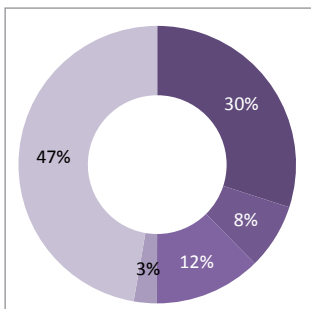


By Education



0-14 Years
15-64 Years
65 Years and Over

By Marital Status



Never Married
Widowed
Divorced
Separated
Married

Figure 4 suggests that Fremantle is a highly attractive destination of choice for migrants from a range of different localities. Most population flows into Fremantle between 2006 and 2011 were over relatively short distances and involved the neighbouring local government areas of Cockburn, Melville and Cottesloe/Claremont. There were, however, numerous groups migrating from across the country, with most interstate residents arriving from Victoria,

Queensland and New South Wales, as well as rural and regional Western Australia.

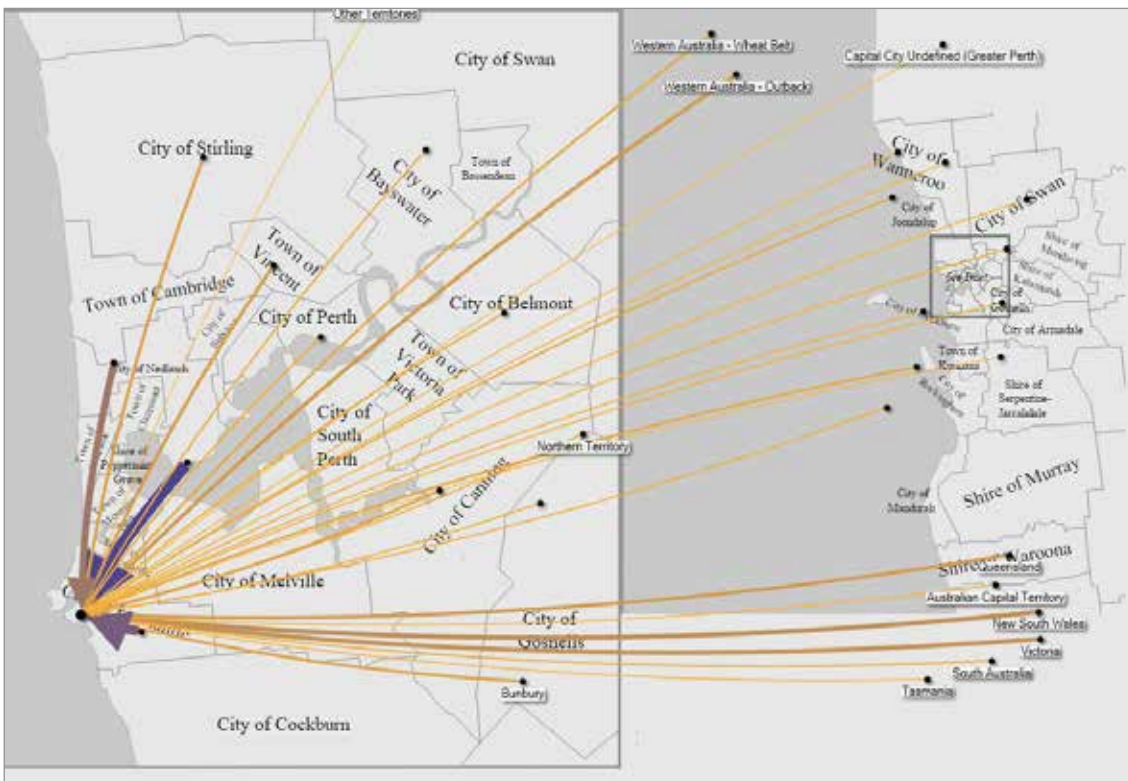
Ethnicity

One of the characteristics most widely celebrated by residents and visitors to Fremantle is its ethnic diversity. This is often viewed as a product of its economic and migrant history, multicultural social institutions and as a geographic reference point for the many migrants who arrived through the Port. Figure 5 emphasises the level of ethnic diversity in

Fremantle, with a notable concentration on European groups. Yet the overall level of diversity is relatively recent, and indeed prior to the 1950s a quite different ethnic structure existed. At the 1947 census, 82.5 per cent of the population was Australian-born. Of the remaining population, the most common countries of birth were the British Isles (77.6%), Italy (8.8%), Yugoslavia (4.1%) and New Zealand (2.2%). By 2011, the structure had changed somewhat. While the United Kingdom and

FIGURE 4: LOCATION OF GREATER FREMANTLE RESIDENTS FIVE YEARS AGO

(Darkness and thickness of lines indicating greater movement)



Source: Adapted from ABS (2011).

Italy continued to be the dominant countries of birth (Table 1), the Australian-born population fell to 63.9 per cent. More recently, Fremantle has become attractive not only to those born in Europe but also to those from North America and Asia.

That Fremantle's ethnic characteristics and history is embraced and celebrated both locally and recognised more widely is an important attribute for the city. Across much of the world, ethnic diversity contributes to vibrant and liveable urban settings. This not only has intrinsic social and cultural value, but also underpins the attractiveness of places in economic terms. The various enterprises, festivals and social institutions that celebrate ethnicity typically help to attract visitors, residents and investment. For Fremantle, ethnicity and multicultural values have the potential to be a source of both social and economic value.

FIGURE 5: ANCESTRY BY BIRTHPLACE OF PARENTS, SOURCE COUNTRIES WITH OVER 1% OF GREATER FREMANTLE POPULATION, 2011

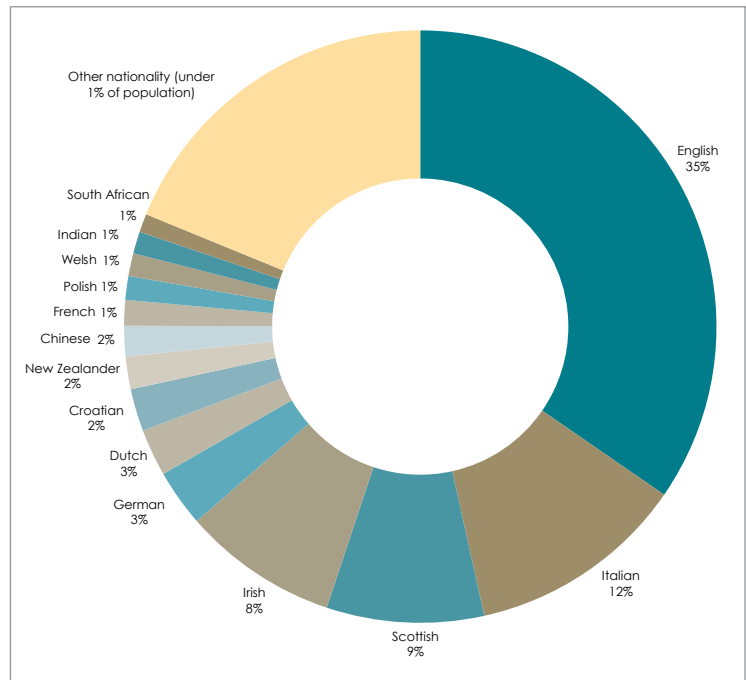


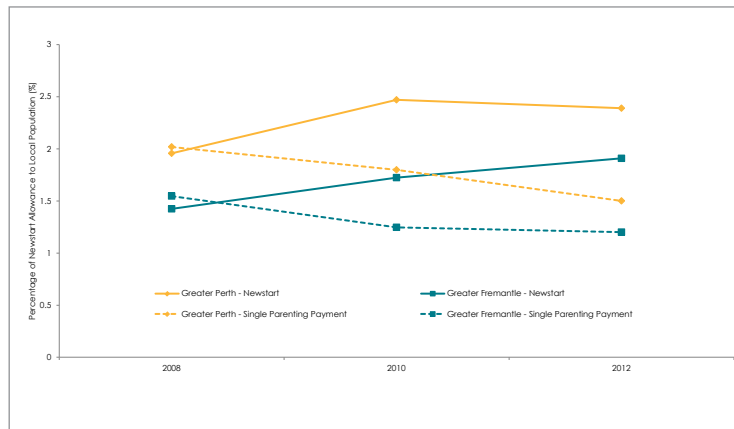
TABLE 1: TOP TWELVE COUNTRIES OF BIRTH OF OVERSEAS-BORN POPULATION, GREATER FREMANTLE, 1947 AND 2011

1947	2011
British Isles	United Kingdom, Channel Islands and Isle of Man
Italy	Italy
Yugoslavia	New Zealand
New Zealand	Ireland
Greece	South Africa
British India and Ceylon	United States of America
Sweden	Germany
Germany	Croatia
United States of America	India
South Africa	Canada
Canada	Netherlands
Denmark	Philippines

SOCIO-ECONOMIC WELLBEING AND HOUSING

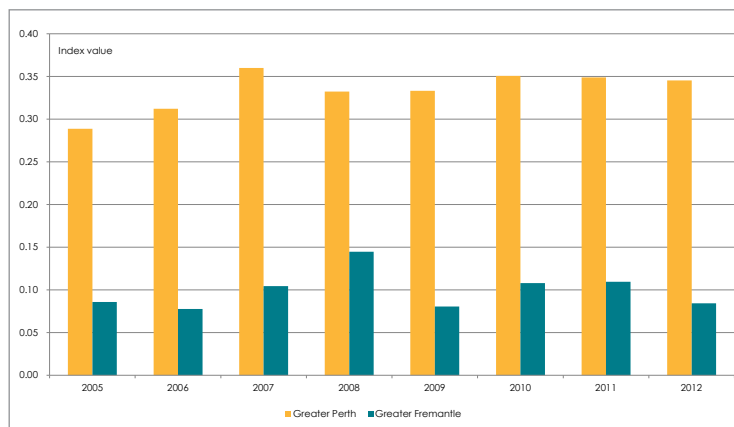
According to 2011 ABS statistics, Fremantle residents have a relatively high level of socio-economic wellbeing. Previous research found Greater Fremantle to have only a small proportion of residents receiving welfare benefits (see Figure 6), relatively even spatial distribution of income (see Figure 7), high average income and a very high mean housing price compared to the Perth and Peel metropolitan region (Martinus and Maginn, 2015). Driven up by East Fremantle's wealth, Greater Fremantle's high cost of housing and high median wage masks affordability issues in Fremantle – Outer and Inner, where the average income is below the Perth average.

FIGURE 6: PERCENTAGE OF ALLOWANCE TYPE PER TOTAL LOCAL POPULATION, 2008-2012



Source: Adapted from Australian Government Department of Human Services (years 2007/08 – 2011/12).

FIGURE 7: VALUE OF SPATIAL INEQUALITY INDEX, GREATER FREMANTLE AND METROPOLITAN PERTH AND PEEL (Lower is more equal wealth distribution)



Source: Adapted from Australian Taxation Office (years 2004/05 – 2011/12).



TABLE 2: MEAN REAL INDIVIDUAL INCOME 2004/05 AND 2011/12, FREMANTLE SLAs COMPARED TO PERTH AND PEEL LOWEST AND HIGHEST INCOME EARNERS

2004-05 Mean Real Individual Income (\$)			2011-12 Mean Real Individual Income (\$)			Percent Change
1	Peppermint Grove	105,705	1	Peppermint Grove	179,248	69.6
2	Cottesloe	105,215	2	Cottesloe	177,979	69.2
3	Nedlands	96,724	3	Nedlands	141,768	46.6
4	Claremont	86,310	4	Mosman Park	140,989	63.4
5	Mosman Park	83,810	5	Claremont	128,679	53.5
9	East Fremantle	65,865	8	East Fremantle	95,760	45.4
15	Fremantle – Outer	57,199	15	Fremantle – Outer	83,900	46.7
16	Fremantle – Inner	56,709	18	Fremantle – Inner	82,302	45.1
36	Kwinana	45,190	36	Armadale	64,652	43.1
37	Bassendean	45,042	37	Kwinana	64,018	42.1
38	Armadale	44,922	38	Bassendean	63,722	41.9
39	Gosnells	44,666	39	Gosnells	62,363	39.6
40	Wanneroo – South	41,793	40	Wanneroo – South	60,509	44.8
Greater Perth/Peel average		58,444.10			86,016.74	47.2
Greater Fremantle average		59,924.33			87,320.67	45.7
Gap between Highest Perth SLA and Gtr Fremantle Ave		45,780.67			91,927.33	
Gap between Lowest Perth SLA and Gtr Fremantle Ave		18,131.33			26,811.67	

Source: Australian Taxation Office (years 2004/05 – 2011/12).

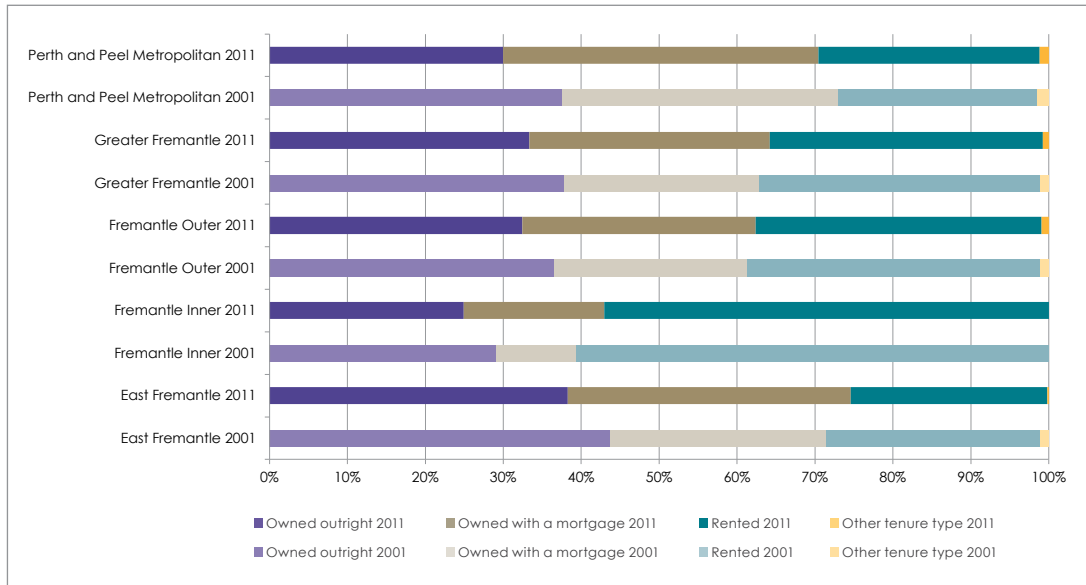


Fremantle's general trend of high housing prices and increased densification may be driven by its relative accessibility and high amenity levels. However, despite having a greater housing diversity compared to Perth and Peel, Fremantle was still dominated by free-standing houses. The trend of declining home ownership and an increasing proportion of mortgages and rental contracts was greater in Fremantle than in metropolitan Perth and Peel (Figure 8). The larger portion of rental properties in Greater Fremantle – particularly Fremantle Inner – is most likely the result of the unaffordability of its higher median housing prices. In 2011, the median house price in Perth was \$490,000. Fremantle's median house price was 1.7 to 2.2 times higher, with Inner Fremantle at \$830,000, North Fremantle at \$905,000, South Fremantle at \$949,000 and East Fremantle at \$1,100,000. Disaggregated by household type, single income groups appeared most affected, with the proportion of double income earners rising

across most housing types (Figure 9). Couples and families increased in most dwelling types, but most notably in apartments. The decrease in single parents and single persons across all housing types is again perhaps linked to housing affordability.

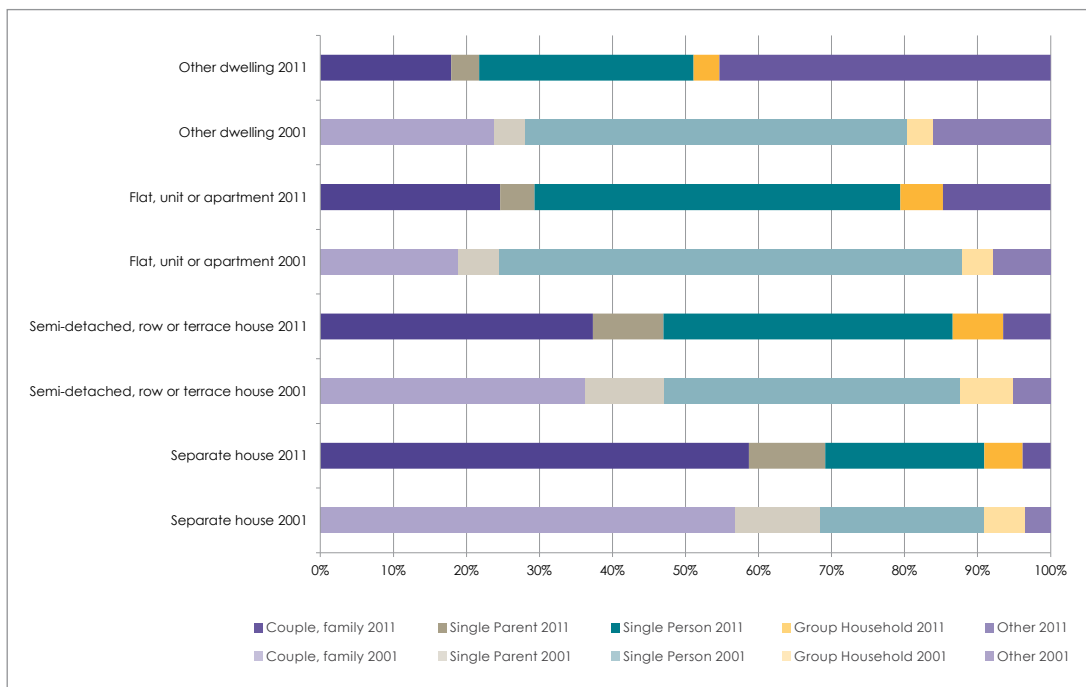
Whilst income may be more evenly distributed than in the rest of the Perth metropolitan region, Greater Fremantle still demonstrates a degree of social disadvantage. Indeed, Fremantle's range of employment opportunities and amenities may not be equally accessible by all members of the community. Whilst this disadvantage is hidden by Greater Fremantle's high performance in measures of wealth, it manifests in particular groups, such as single parents, or within specific urban pockets in more disadvantaged SLAs. Increasing trends to trade home ownership for a mortgage or rent presents a scenario of residents living beyond their means, which places them at risk of financial hardship in times of an economic downturn.

FIGURE 8: DWELLING OWNERSHIP BY SPATIAL UNIT (% OF TOTAL), 2001 AND 2011



Source: ABS (2011).

FIGURE 9: DISTRIBUTION OF HOUSEHOLD TYPE BY DWELLING IN GREATER FREMANTLE, 2001 AND 2011



Source: ABS (2011).

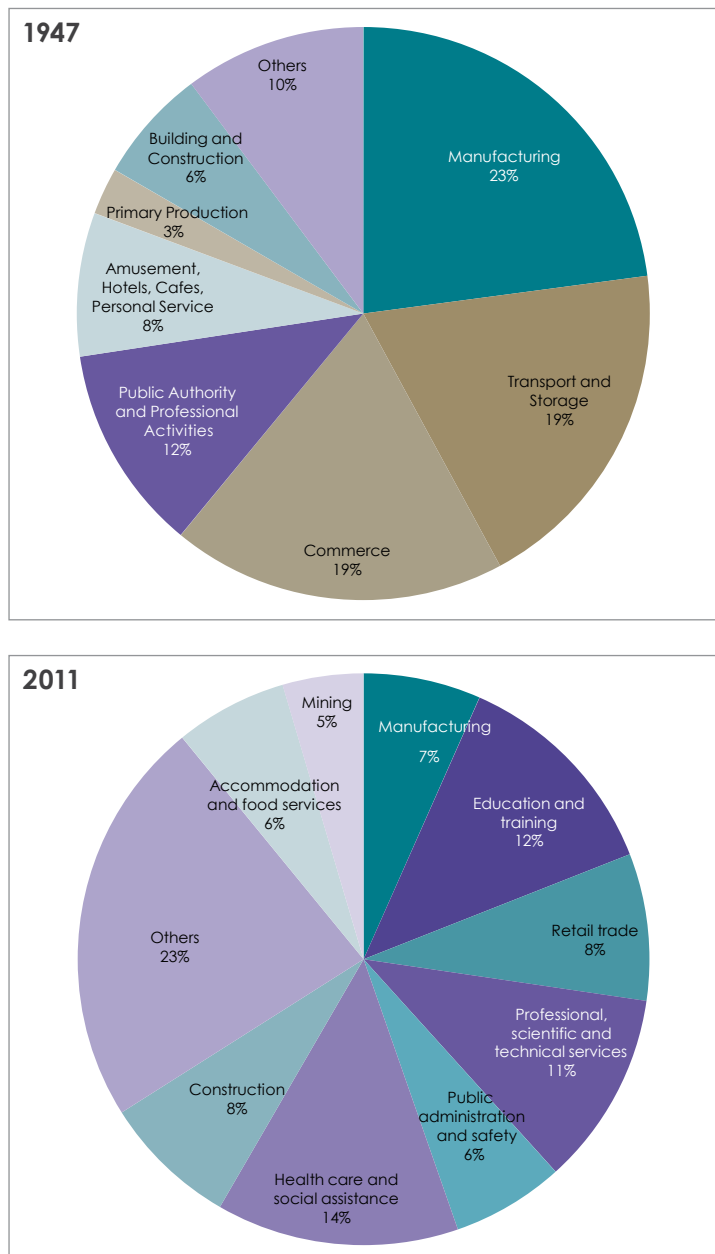
CHANGING ECONOMIC PERFORMANCE AND PROSPERITY

EMPLOYMENT AND THE ECONOMY

Employment

One of the most important changes experienced in Fremantle has been in the nature of employment. Taking a longer view of employment change is helpful in the case of Fremantle, as it helps demonstrate how extensive the transformation has been. As Figure 10 shows, people in Fremantle in 1947, were typically engaged in manufacturing, transport and storage, and commerce (retailing and wholesaling). Other critical industries included agriculture and fishing and public sector employment. By 2011, the Greater Fremantle area had changed quite remarkably with the leading areas of employment including health care and social assistance, education and training, and professional, scientific and technical services industries.

FIGURE 10: INDUSTRY OF EMPLOYMENT, 1947 AND 2011



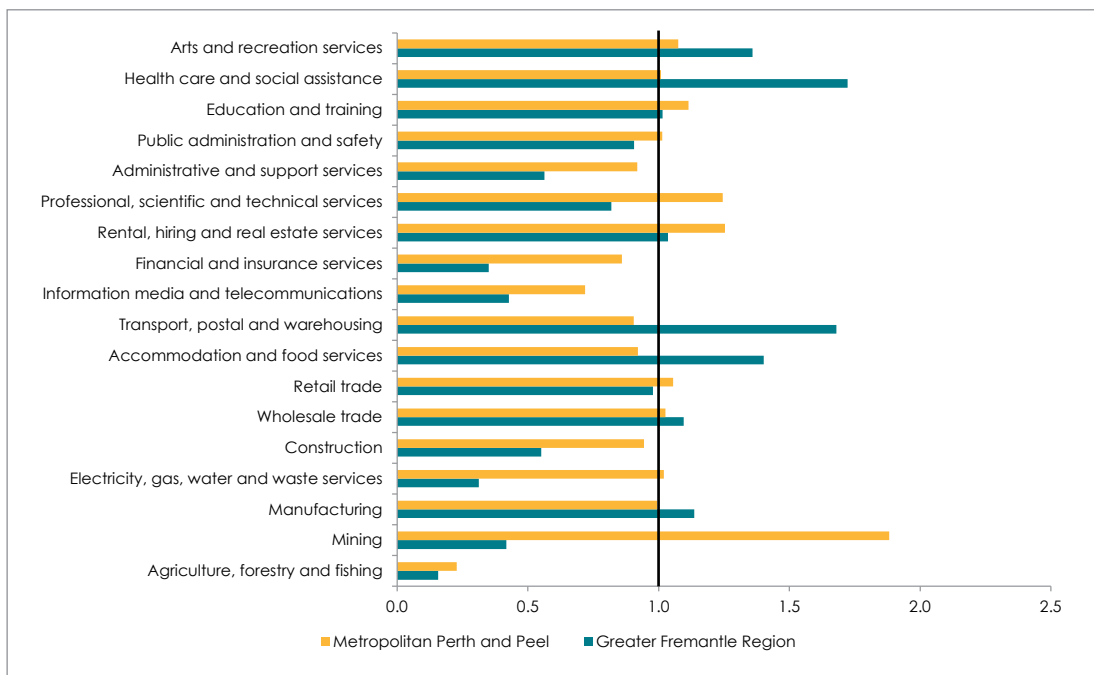
Economic Development

The employment characteristics of Fremantle are largely linked to the general economic structure of the region. In broad terms, the economic growth and development of a region is associated with industry agglomerations, based on regional competitive advantages such as specialised labour pools, similar or complementary firms, access to transport or resource inputs, and so on. Industries of specialisation provide products or services that can be exported or provided to other regions.

It is measured through location quotients (LQ), which are used to calculate the regional employment concentration of each industry sector in Greater Fremantle and metropolitan Perth and Peel, relative to concentrations of industry across the rest of Australia (see Figure 11). LQs greater than 1 denote industries of specialisation or export, equal to 1 denote industries with equal concentration as is found in the rest of Australia, and less than 1 denote industries which are under-represented against the national economy.

The industry specialisation of Greater Fremantle was quite distinctive when compared to metropolitan Perth and Peel (see Figure 12). Where Perth and Peel were particularly strong in mining, professional, scientific and technical services, and rental, hiring and real estate services, Greater Fremantle was not. Greater Fremantle's specialisations were in arts and recreation services, health care and social assistance, transport postal and warehousing, accommodation and food services, and then, to a lesser extent in manufacturing and wholesale trade.

FIGURE 11: INDUSTRY OF EMPLOYMENT IN GREATER FREMANTLE AND PERTH AND PEEL METROPOLITAN LOCATION QUOTIENTS, BY PLACE OF WORK, 2011



An additional aspect of economic growth and development is the spatial and demographic change in business. In 2013, there were a total of 167,063 businesses in metropolitan Perth and Peel, of which 4,635 (or 3%) were situated in Greater Fremantle. By region, there were a total of 2,567 businesses in Fremantle, 1,269 in Fremantle South and 820 in Fremantle East. Overall, Greater Fremantle had a high proportion of its business in the industries of accommodation and food services, retail trade, financial and insurance services, and transport, postal and warehousing.

Figure 13A disaggregates this by turnover size. The majority of businesses across all spatial units are businesses with very low turnover. Fremantle is comprised of a larger proportion of higher turnover businesses compared to Perth and Peel, whilst Fremantle East and South tend to have a concentration of low turnover businesses. This may reflect rental price differentials between the urban core of Fremantle and its surrounding areas, with a large number of low turnover businesses locating in areas where rent is relatively lower.

Figure 13B portrays businesses by the number of employees. The majority of businesses at each spatial level are either non-employing small businesses or have one to four employees. Given the minimal number of large businesses employing over 200 workers within each region (between 0.1 and 0.2%), the 5 per cent found in Fremantle South is significant and most likely related to the hospital given that the main employing industry is health care and social assistance (13.5%). This represents an area of strength that has the potential to be capitalised upon.

FIGURE 12: PROPORTION OF BUSINESS IN EACH REGION BY INDUSTRY OF EMPLOYMENT INCLUDING ENTRIES AND EXITS BETWEEN JUNE 2009-2013

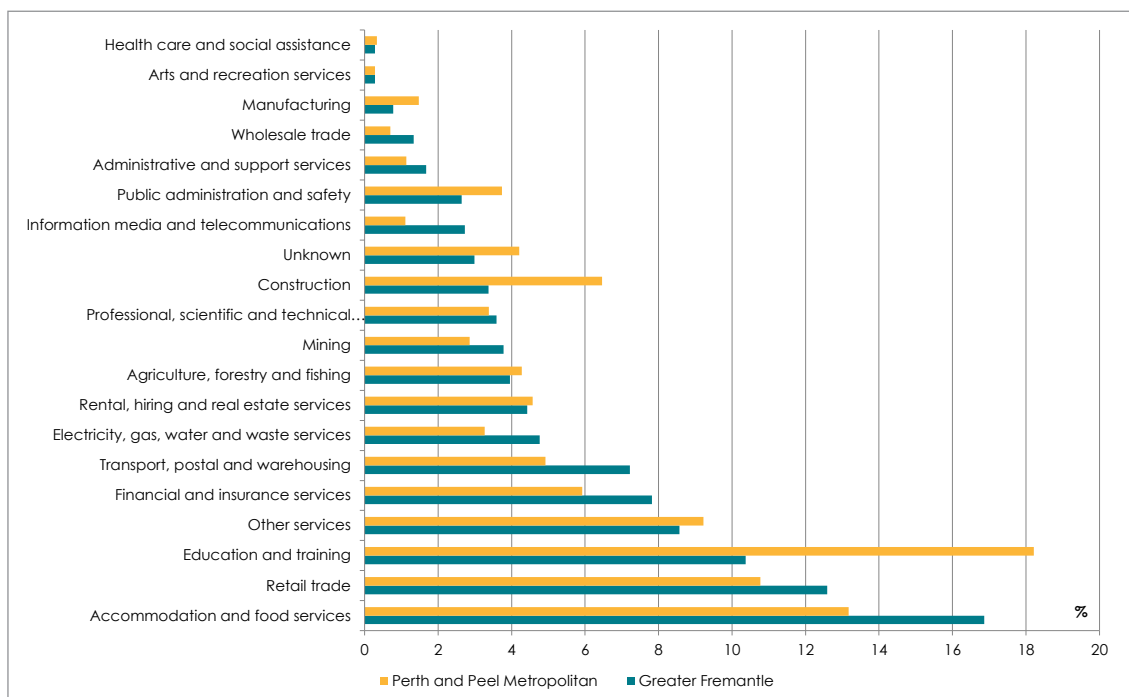
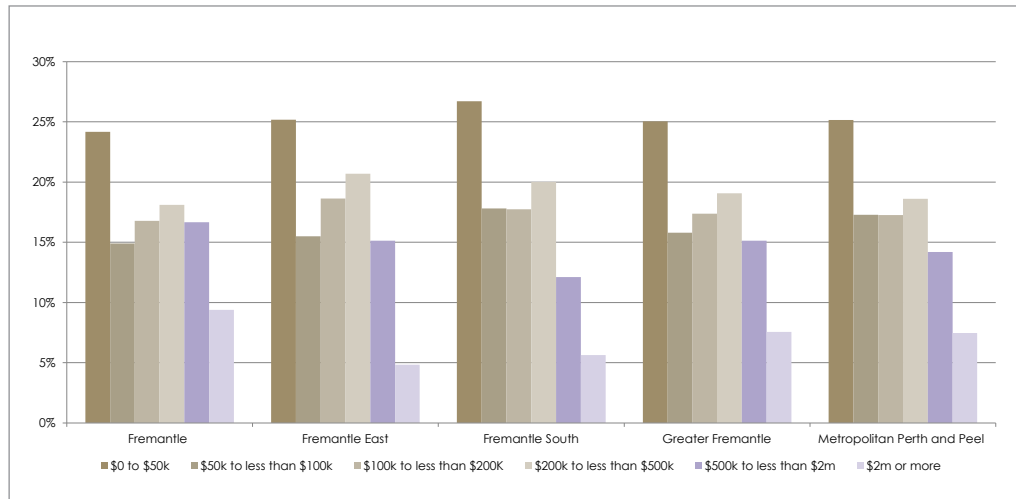
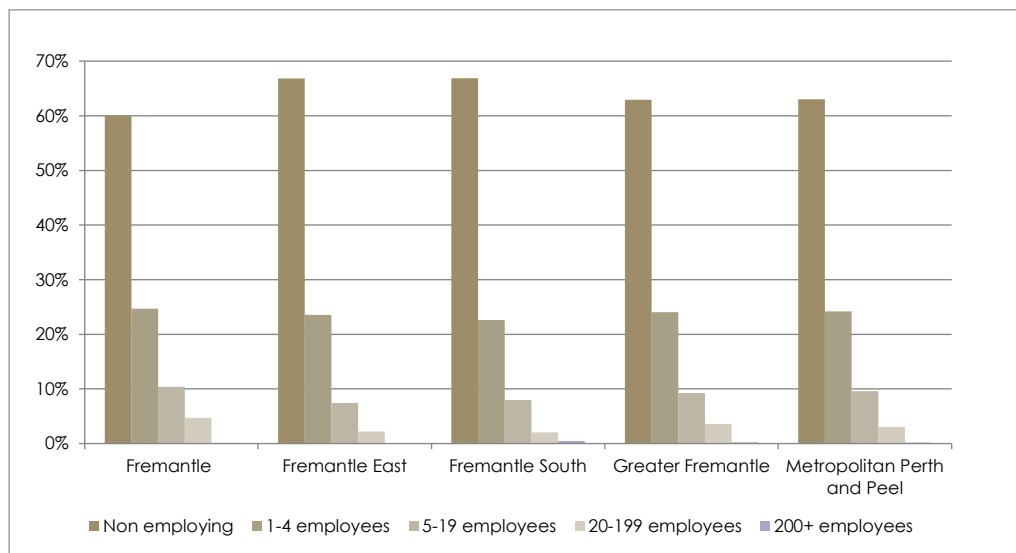


FIGURE 13A AND 13B: PROPORTION OF BUSINESSES IN EACH REGION BY TURNOVER SIZE, AND BY NUMBER OF EMPLOYEES, INCLUDING ENTRIES AND EXITS BETWEEN JUNE 2009-2013

13A



13B



ECONOMIC COMPETITIVENESS

Economic competitiveness is an important yardstick in assessing the overall health of a region, such as Fremantle, relative to its broader operating environment of metropolitan Perth. A shift-share analysis provides a means of evaluating economic competitiveness, disaggregating job

changes by sector and into three growth components associated with national, industry or regional/local growth rates (see Table 3). Overall, Greater Fremantle experienced an increase of 1,077 jobs between 2006 and 2011, the majority being in construction, professional, scientific and technical services, as

well as the entertainment, health and education-related industries. While all jobs increased as a result of national trends up 4,131 jobs, the share of jobs to increase from Fremantle's industry mix was insignificant, contributing only 48 jobs overall, with a key area being health care and social services.

TABLE 3: SHIFT-SHARE BREAKDOWN OF JOBS BY INDUSTRY OF EMPLOYMENT, GREATER FREMANTLE 2006-2011, PLACE OF WORK

	National Share		Industry Mix		Regional Shift		Total	
	Absolute no. jobs	% change	Absolute no. jobs	% change	Absolute no. jobs	% change	Absolute no. jobs	% change
Agriculture, forestry and fishing	27.4	0.2	-40.2	-0.2	-53.2	-31.3	-66.0	-38.8
Mining	20.6	0.2	73.8	0.6	-26.4	-20.7	68.0	53.1
Manufacturing	501.6	0.2	-536.8	-0.2	-352.7	-11.3	-388.0	-12.5
Electricity, gas, water and waste services	7.7	0.2	8.0	0.2	32.3	67.3	48.0	100.0
Construction	144.8	0.2	82.0	0.1	88.1	9.8	315.0	35.0
Wholesale trade	230.6	0.2	-161.0	-0.1	-324.5	-22.7	-255.0	-17.8
Retail trade	477.4	0.2	-299.5	-0.1	-394.9	-13.3	-217.0	-7.3
Accommodation and food services	366.6	0.2	59.9	0.0	-279.4	-12.3	147.0	6.5
Transport, postal and warehousing	346.4	0.2	40.0	0.0	-398.4	-18.5	-12.0	-0.6
Information media and telecommunications	30.6	0.2	-24.7	-0.1	6.1	3.2	12.0	6.3
Financial and insurance services	54.9	0.2	-20.1	-0.1	-24.9	-7.3	10.0	2.9
Rental, hiring and real estate services	65.9	0.2	-44.6	-0.1	6.7	1.6	28.0	6.8
Professional, scientific and technical services	190.6	0.2	88.3	0.1	127.1	10.7	406.0	34.3
Administrative and support services	83.8	0.2	13.4	0.0	-133.2	-25.6	-36.0	-6.9
Public administration and safety	306.0	0.2	-1.8	0.0	-543.2	-28.6	-239.0	-12.6
Education and training	309.8	0.2	34.2	0.0	-97.0	-5.0	247.0	12.8
Health care and social assistance	708.9	0.2	436.4	0.1	-202.4	-4.6	943.0	21.4
Arts and recreation services	79.1	0.2	35.5	0.1	-58.6	-11.9	56.0	11.4
Other services	129.1	0.2	-8.9	0.0	-96.2	-12.0	24.0	3.0
Inadequately described/Not stated	49.6	0.2	314.4	1.0	-378.1	-122.7	-14.0	-4.5
Total	4131.5	16.1	48.3	0.0	-3102.8	-12.1	1077.0	4.2

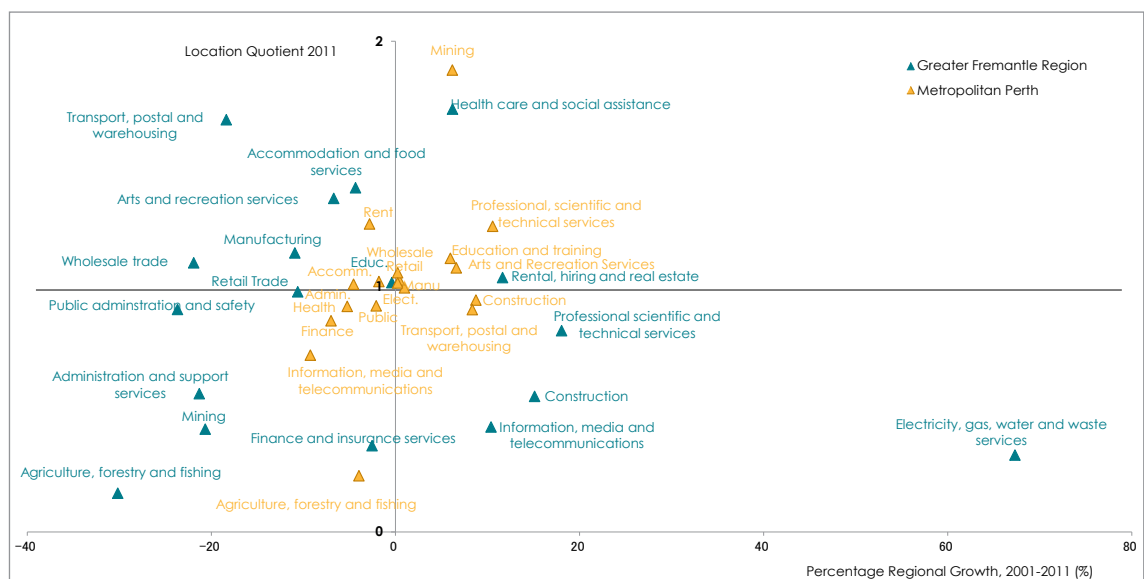
The impact of regional or local growth rates (the 'regional shift' in Table 3) is important in understanding local competitiveness. In essence, this shows the degree to which local factors influence competitiveness. These factors can include social capital, governance, infrastructure quality and land costs. This regional 'competitive effect' is of particular significance in identifying areas that might be performing well overall, or that are important to an economy, but are hindered by shortcomings in the local environment. In broad terms, Fremantle performed poorly in the regional shift, down 3,103 jobs. This signals the need

to focus on enhancing the local operating environment for key sectors. Key industries where Fremantle is performing well in terms of local competitiveness are health care and social assistance, professional, scientific and technical services and construction. Whilst other sectors performed less well, this does not mean they are unimportant. It stresses the need to pay greater attention to these sectors during policy formulation in order to help them fulfil their potential.

Figure 14 shows sectors of high specialisation and local competitiveness in the upper right quadrant, notably health care and

social assistance. Those sectors of high specialisation that are hindered by local competitive constraints are in the top left quadrant (e.g. transport and storage-related industries, accommodation and food services, arts and recreation services, retail trade and manufacturing). The bottom right quadrant identifies industries where Fremantle is under-represented, but has grown strongly indicating a potential for further local development. These industries are professional, technical and scientific services, construction, electricity, gas, water and waste services, and information, media and telecommunications.

FIGURE 14: REGIONAL SHIFT AND LOCATION QUOTIENT OF JOBS BY INDUSTRY OF EMPLOYMENT, 2006-2011 GREATER FREMANTLE AND PERTH METROPOLITAN AREA, PLACE OF WORK



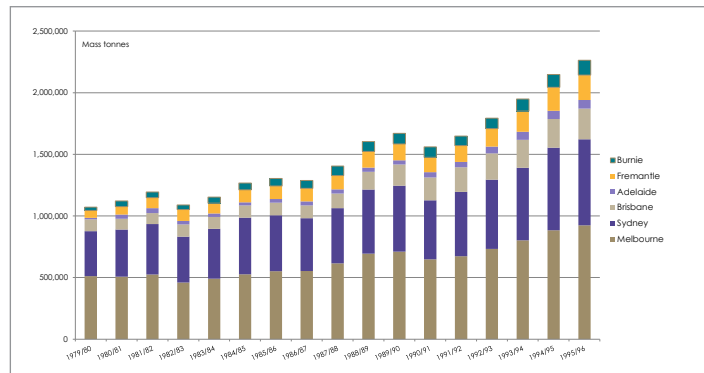


FREMANTLE'S PORT

Fremantle Port is one of the State's most significant transport and logistics hubs. Its Inner Harbour handles the majority of the State's container trade, and the Outer Harbour is one of Australia's largest bulk cargo ports. In 2012/13, its 32 million mass tonnes of total trade was valued at \$30 billion, and each ship to berth in Fremantle is estimated to create 3.3 full-time jobs annually. This makes the Fremantle Port one of the most important drivers of economic growth in the State, and emphasises how critical it is to the Greater Fremantle region.

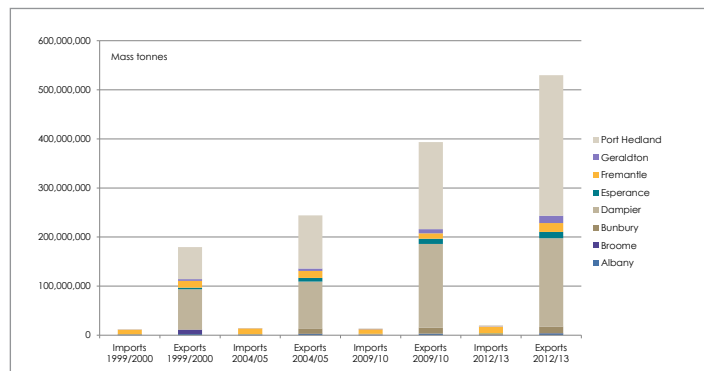
The increase in container movements through the Port provides an indication of its economic importance both nationally and within Western Australia. Between 1979 and 1996, Fremantle's container throughput increased from 5.7 per cent to 9 per cent of all major national major ports (see Figure 15). As Western Australia's resource economy expanded over the past decade or so, the volume of trade through other ports has increased rapidly, diminishing Fremantle's proportion of port exports from 7.7 per cent to 3.4 per cent between 1999 and 2013 (see Figure 16). Nonetheless, it still remains WA's largest import port, although

FIGURE 15: CONTAINER THROUGHPUT, MAJOR AUSTRALIAN PORTS 1979-1996



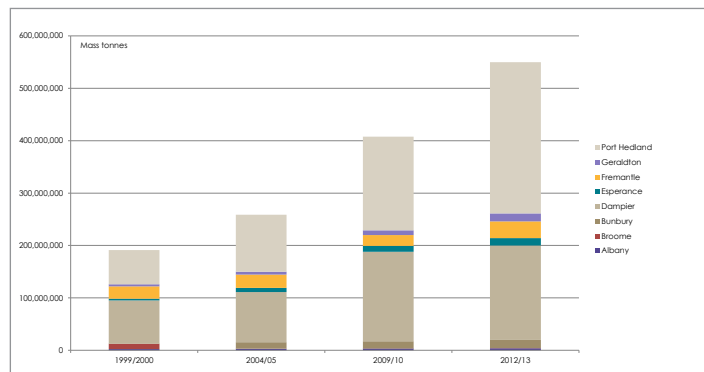
Source: Adapted from Ports Australia (2015).

FIGURE 16: CONTAINER EXPORT AND IMPORT THROUGHPUT, MAJOR WESTERN AUSTRALIAN PORTS 1999-2013



Source: Adapted from Ports Australia (2015).

FIGURE 17: CONTAINER TOTAL THROUGHPUT, MAJOR WESTERN AUSTRALIAN PORTS 1999-2013



Source: Adapted from Ports Australia (2015).



its percentage of total imports fell from 79.4 per cent to 70.1 per cent over this period (see Figure 17). Overall, it continues to be of significant importance to the State's economy, being a key articulation point of global economic activity.

Examining total import and export flows between major trade nations reveals the strong Asian focus for Fremantle, and more broadly, Western Australia (Figure 18). Total shipping trade, both import and export totals of full and empty containers, to and from Fremantle Port rose by 247,306 containers between 2005/06 and 2013/14. This reflected increases in trade with the United States, up 8,545 containers, and Asia-Pacific neighbours of China up 103,310, Singapore up 34,649, Malaysia up 32,778, as well as Vietnam, Thailand, India and Indonesia each up between 5,500 and 9,300 containers. The largest declines were with historically strong trading partners Japan, down 9,362 and New Zealand, down 6,546.

It is also noteworthy that the 703,327 containers moving through Fremantle Port in 2013/14 reveal an interesting dimension to the State's trade balance in manufactured goods. That is, while 94 per cent of the 363,917 (52% of total trade) container imports were

full, only 61 per cent of the 339,410 (48% of total trade) container exports were full.

Fremantle's global trade links articulate into the State's urban and regional economies (see Figure 19). Across the 2005/06 to 2013/14 period, the most significant unpack and pack locations for containers of Kewdale/Forrestfield/Welshpool correspond to metropolitan Perth's strong light manufacturing, logistics and distribution centre, adjacent to its international and domestic airports. This is closely followed by O'Connor/Spearwood/Bibra Lake industrial areas, as well as Kwinana/Rockingham/Naval Base/Henderson, emphasising their role in the State's export economy. Declines in trade between Fremantle and regional Western Australia may reflect some diversion of some trade to other ports and WA's weakening resource sector.

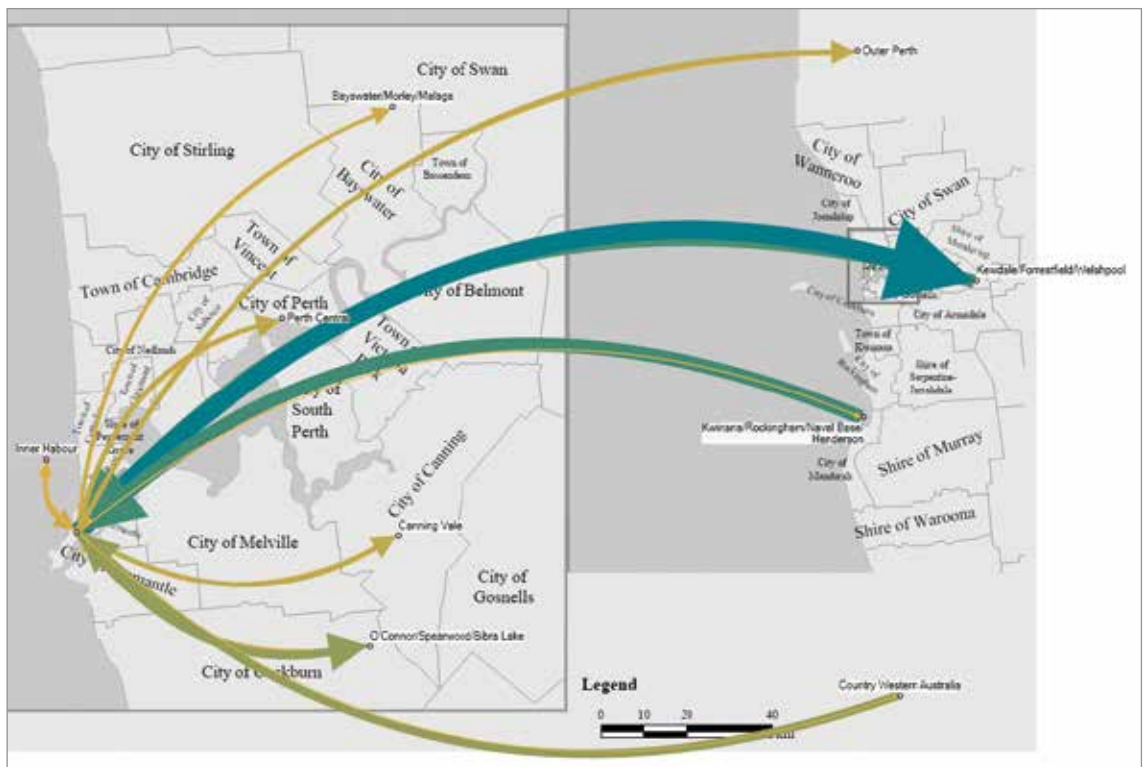
FIGURE 18: FLOW OF IMPORTS AND EXPORTS BETWEEN FREMANTLE AND MAJOR TRADING PARTNERS

(Width and darkness of yellow to green lines indicate container numbers)



Source: Adapted from Fremantle Ports (2012).

FIGURE 19: MAJOR UNPACK AND PACK LOCATIONS, BY 2011 VOLUMES



Source: Adapted from Fremantle Ports (2014b).



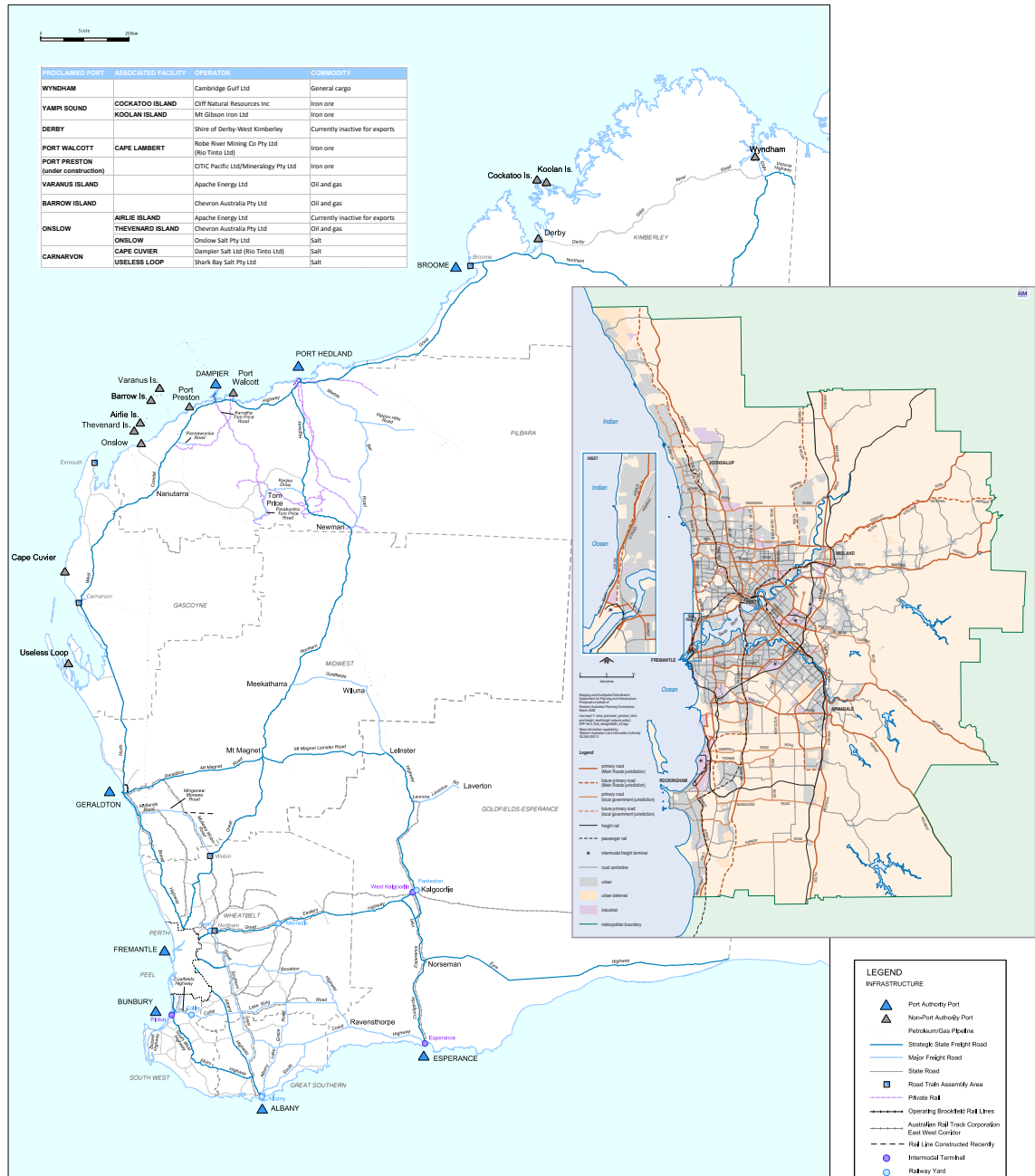
While Fremantle's Port is central to the State's economy, it is not without challenges. Despite poor east-west links, road transport is used for around 85 per cent of the containers through the Port. This road network then articulates into the wider Perth metropolitan region and across Western Australia (see Figure 20), with the associated issues of congestion and transport efficiency becoming increasing important areas of policy debate and action. This is particularly evident in the current debates about the Perth Freight Link and the wider objective of better connecting Fremantle Port, the Perth Airport, strategic industrial centres and the major State transport corridor to Muchea.

There is also debate about the conflicts between a major working port and the surrounding urban environment. These debates centre on issues associated with noise, odours, traffic and other forms of land use conflict. There is long-standing interest in developing an inter-modal cargo facility in the Cockburn/Kwinana area, though the reality is that Fremantle will remain the State's major cargo Port for the foreseeable future.

While Fremantle Port and some of the associated challenges have been a source of debate, the overwhelming evidence is that it is a source of economic advantage and strength for the region. Aside from its critical function in facilitating

trade, the Port presents a unique resource in the development of the Greater Fremantle region. The success of ports throughout the world in leveraging their assets to promote broader community and economic development objectives provides valuable lessons into the importance of a collaborative approach. The diversity of port experiences presents new ways of reimagining heritage and history, community and business, with many places successfully incorporating tourism, entertainment and education into their strategic planning frameworks (see pages 34-35).

FIGURE 20: ROAD AND RAIL FREIGHT TRANSPORT ROUTES BETWEEN FREMANTLE, PERTH AIRPORT AND REGIONAL WESTERN AUSTRALIA



Images courtesy of Department of Transport and Western Australian Planning Commission.

KEY FEATURES OF SELECTED PORTS AND PORT CITIES



The Port of Montreal is a diversified port that handles all types of cargo – containerised cargo, liquid bulk and dry bulk, including grain.



In 2012, the Port of Rotterdam adopted Port Vision 2030 which was much less focused on targeting future throughputs, but more focused on how the port of the future could look, based on the assessment of the varying trends that could change the role of ports.



Port Metro Vancouver is Canada's largest, and North America's most diversified port. In addition to ensuring the safe and efficient movement of cargo and passengers, the Port also collaborates with stakeholders, responding to community interests and issues and preserving the environment.



Cartagena, Spain is a historic port city which is pedestrian-friendly, with ramps and lifts at most tourist sites. With the tourist sites concentrated in a relatively small area, the city is ideal for self-guided tours.



In addition to being Japan's largest and busiest trading port, the Port of Nagoya's Public Aquarium is also a main attraction. Festivals such as Marine Day in the summer and Christmas Eve features fireworks launched from the waters of the port.

The OECD report (2013:7-8) on the competitiveness of global port cities identified three main avenues by which cities can increase the benefits from their ports:

- Maritime services clusters focused on attracting high value-added services such as maritime finance, consulting, law and engineering services;
- Industrial development focused on industries interested in being close to imported resources and consumer markets; and
- Waterfront development capitalising on port and maritime heritage.

The report (OECD, 2013:114) further stresses the importance of pursuing economic diversification that is not port-dependent.

What is important is to ensure that the main stakeholders are engaged in the process, links with clients are strengthened, and local goodwill is created.

There are lessons to be learnt from the experience and initiatives of other ports, which the Port of Fremantle can consider as it navigates its way towards a strategic future. The potential to deliver a successful port waterfront redevelopment, incorporating a mix of recreation, tourism, maritime and heritage features that include a passenger terminal is definitely something that could be explored.



The Port of Melbourne introduced special port education centres for children and students, which propose guided tours to operating ports, visits to cargo-handling, ship-repairing companies, and training seminars.



UNIQUE OPPORTUNITIES

HERITAGE AND CULTURE

Greater Fremantle has a rich and unique heritage, predicated on its location at the junction of the Indian Ocean and the Swan River, which has attracted people and facilitated trade for thousands of years. Today, this geography, and the rich and diverse heritage, places, stories, and character it has founded is arguably Fremantle's strongest and most distinctive competitive advantage.

Indigenous Heritage

For thousands of years, Fremantle has been a meeting place and area of cultural and ceremonial significance to the Indigenous Whadjuk people, who gave the area its Noongar name, Walyalup (City of Fremantle, 2015a).

Natural features, particularly Fremantle's location at the confluence of the Swan River estuary and Indian Ocean were the foundation of the area's significance. Historically, a rocky bar sheltered the Swan River estuary from the sea, providing good fishing grounds; a natural river crossing; and making it the place where tracks from north and south of the river converged (City of

Fremantle, 2015; Donaldson + Warn Architects *et al.*, 1997).

As a result, an area on the south bank of the river near the river mouth and the headland, known to the Whadjuk people as Manjaree, became an important meeting and trading place (Donaldson + Warn Architects *et al.*, 1997).

The area maintained this role for thousands of years until the arrival of British settlers in 1829. This radically disturbed Noongar life, culture and customs and precipitated a period of conflict between Noongar people and the settlers, which heralded the beginning of nearly 200 years of marginalisation and oppression (SWALSC, 2015).

But the 21st century is witnessing significant attitudinal change and there is positive momentum for the acknowledgement of Indigenous heritage and culture in Fremantle and the wider Perth region (City of Fremantle, 2014).

Early European Heritage of Fremantle and the Port

From 1616 to 1800 the coast of Western Australia was visited by European

navigators of various nationalities, culminating in the arrival of British settlers in Albany and Fremantle in the early 1800s (see pages 40-41 for the timeline of key events in 19th and post-war 20th century Fremantle).

The landing of the first British settlers in Fremantle is well documented, with the area's first settlers arriving on-board the *Parmelia* in June 1829, captained by James Stirling. In its early days, Fremantle was little more than a camp site, described by an early settler George Fletcher Moore as: "... a bare, barren-looking district of sandy coast; the shrubs cut down for firewood, the herbage trodden bare, a few wooden houses, many ragged looking tents..." (Barnard, 2012:58).

The population of Fremantle and the Swan River Colony grew slowly. By the 1840s, agricultural industries had been established and produce such as sandalwood and wool were exported via Fremantle's Long Jetty (Dowson, 2011). However, the first significant economic boost did not arrive until 1850, with the transportation of convicts to the colony.

Fremantle's 19th century heritage assets are significant local attractions today. Fremantle Prison is rated as the 'thing to do' in Fremantle on the website *Tripadvisor*, followed by The Shipwreck Galleries, the Western Australian Maritime Museum and the Duyfken Replica.

However, while Fremantle's early European history is well-documented, the area is lacking a cultural/historical focal point (City of Fremantle, 2014). Fremantle's cultural and heritage assets are also operated independently and there is potential to link its Indigenous, European and maritime heritage stories and assets to deliver a coherent visitor experience. There may also be potential to consolidate access to existing attractions and encourage longer visitor stays and increased spending.

Fremantle's Gold Rush Heritage

With the 1885 discovery of gold, Fremantle became the gateway to Western Australia's booming Eastern Goldfields and consequently, the town grew rapidly. Between 1881 and 1901, Fremantle's population expanded from 3,641 to 20,444 people (Jones, 2007:171) and between 1898 to 1925 Western Australia welcomed 430,000 arrivals from overseas and other

Australian ports, many of whom entered via Fremantle Port (State Records Office WA, 2015).

The gold rush transformed the physical landscape and established Fremantle as Western Australia's premier port city. It also delivered a rich legacy of Victorian and Edwardian style architecture; and a "tight knit, walkable" street pattern (City of Fremantle, 2015b).

Gold rush immigration also influenced Fremantle's demographic character. In 1891, there were 36 Italian residents living in the colony, but by 1898, 150 Italians were recorded, some of whom became pioneers of Fremantle's fishing industry (Dowson, 2011).

The fishing industry became important to Fremantle's economy and by 1947, fishermen sold their produce through a co-operative fish market. Although greatly altered, the building in which the fish market was housed is still standing near Bather's Beach (Dowson, 2011).

Fremantle's gold rush architecture has become central to the area's identity and character, but the story of gold rush immigration and the journeys of immigrants and their connections to Western Australia people and industries today remain

largely untold. However, interest in Australian history and family history is increasing. Recent decades have also seen interest in food and fresh produce increase substantially, presenting a number of possible opportunities for Fremantle.

Military Heritage of Fremantle and Fremantle Port

Fremantle played a vital role in Australian and allied war efforts as a submarine base. During war times Fremantle Port was the point of departure and return for thousands of troops deployed overseas. The harbour also served as a temporary home for scores of Australian and allied naval vessels, including battleships, troop transports, hospital ships and support vessels. Until recently, this period of Fremantle's history was largely forgotten and today it is a story that remains largely untold (Dowson, 2011).

There is, however, considerable evidence indicating that interest in Australia's military history and the potential to expand Fremantle's role in communicating Fremantle Port's WWII story, the story of Western Australia at war and more broadly, the story of WWII in Australia and the Asia Pacific Region.



Post-War 20th Century Fremantle

Post WWII, Fremantle continued to be strongly influenced by the shifting role of Fremantle Port. In particular, the character of Fremantle, its people and businesses were influenced by the area's role as the first port of call for new immigrants to Australia.

Post-war immigration was of critical importance to contemporary Western Australia and Australian history and Fremantle was at its epicentre. The result was that Fremantle became an enclave for new migrants and by the middle of the twentieth century it had developed a distinctly European character. In fact, *"Dozens of Italian shops lined the streets, including Paino's Fish Shop and Luisini's Drapery. There was a network of boarding houses for the single men who had moved to this strange country to start a new life for their families..."*

(Capri Restaurant, 2015). This influence of migration from Italy and southern Europe is still evident in Fremantle's demographic and commercial character (Huddleston, 2015b).

Yet while Fremantle's 20th century immigration prominence influenced the area's character, it did not raise its economic fortunes. Despite a second mineral boom (iron ore and nickel) in Western Australia between 1960 and 1970, Fremantle's economy remained relatively dormant (Jones, 2007).

This was the result of a combination of influences, including a strategic regional shift towards outward growth patterns of heavy industrial land uses and associated port facilities in Kwinana and the increasing mechanisation of port operations (Jones, 2007).

Yet time has proven this decline to be fortuitous. In 1960s Perth, priority was given to economic development over heritage protection, resulting in the demolition of many of Perth's most important heritage assets (Jones, 2007). The acknowledgment of the value of Greater Fremantle's architectural heritage led to the preservation of its unique form and distinctive character in the 1960s and 1970s.

America's Cup

By the early 1970s, there was a growing movement for the preservation of Fremantle's heritage assets. Fremantle's America's Cup redevelopment raised Fremantle's profile; resulted in significant gentrification; and increased its regional role as a premier visitor and recreation destination (Jones, 2007). But when Australia failed to retain the America's Cup, investment in Fremantle stagnated.

Fremantle's final America's Cup legacy was the development of the Fremantle Waterfront Masterplan, which proposed the development of the Western Australian Maritime Museum and revitalisation of the under-utilised western end of Victoria Quay. The primary motivation for the development of the Maritime Museum was to provide a home for the America's Cup winning yacht Australia II (Donaldson + Warn Architects *et al.*, 1997).

Completed in 2002, the Maritime Museum is an iconic structure which communicates aspects of Fremantle's maritime, gold rush, naval and immigration history but retains a strong focus on America's Cup sporting heritage.

In 2015, nearly thirty years after the America's Cup defence, Fremantle has

not experienced another significant period of economic growth. Over this period, it has become apparent that while heritage is a competitive advantage, Fremantle's focus on heritage preservation has resulted in the area being perceived as a difficult place to invest (Urbis *et al.*, 2011). It has also become evident that, while Fremantle's community value the retention of a working port, there are inherent conflicts between port expansion, infrastructure provision and the retention of urban amenity (City of Fremantle, 2014; Jones, 2007).

Capitalising on Fremantle's Distinct Heritage

Fremantle's unique heritage story and assets deliver a distinct competitive advantage and a range of possibilities for the future. These include establishing Fremantle as a focal point for communicating, celebrating and educating people about WA's Indigenous, immigration, naval and military heritage; further developing and adding to Fremantle's existing heritage and cultural assets; and initiating genuine urban renewal and revitalisation which reflect Fremantle's historical roles and strengths.



KEY EVENTS IN 19TH AND POST-WAR 20TH CENTURY FREMANTLE

1829 (May 2)

The first British settlers landed in Fremantle, heralded by Captain Charles Fremantle, to claim the west coast of New Holland for the British Crown (James, 2015).

1844 – 1849

A sandalwood boom grips the Swan River colony and Fremantle harbour becomes the focus for sandalwood exports (Dowson, 2011).

1859

Population growth as a result of convict transportation sees Fremantle's population swell to 2,392 (Donaldson + Warn Architects *et al.*, 1997).

1897

The completion of the Inner Harbour precipitated a period of rapid construction and the relocation of shipping companies and warehouses to Fremantle's West End (Donaldson + Warn Architects *et al.*, 1997).

1880 – 1897

Civic infrastructure, including the Fremantle-Guildford Railway line and the Fremantle Town Hall, were completed and Fremantle markets were established as a wholesale food and produce market (Donaldson + Warn Architects *et al.*, 1997; Fremantle Markets 2015).

1830

1831

Western Australia's first public building The Round House was completed atop Arthur Head.

1860

1850 – 1868

Convict transportation to Fremantle results in local limestone being used by convict labour to construct notable buildings including the UNESCO world heritage listed Fremantle Prison – one of only 12 Australian convict sites appointed world heritage status – as well as a Lunatic Asylum and Warders Quarters (now Fremantle Arts Centre) (Jones, 2007; Australian Government, 2015).

1890

1892 – 1897

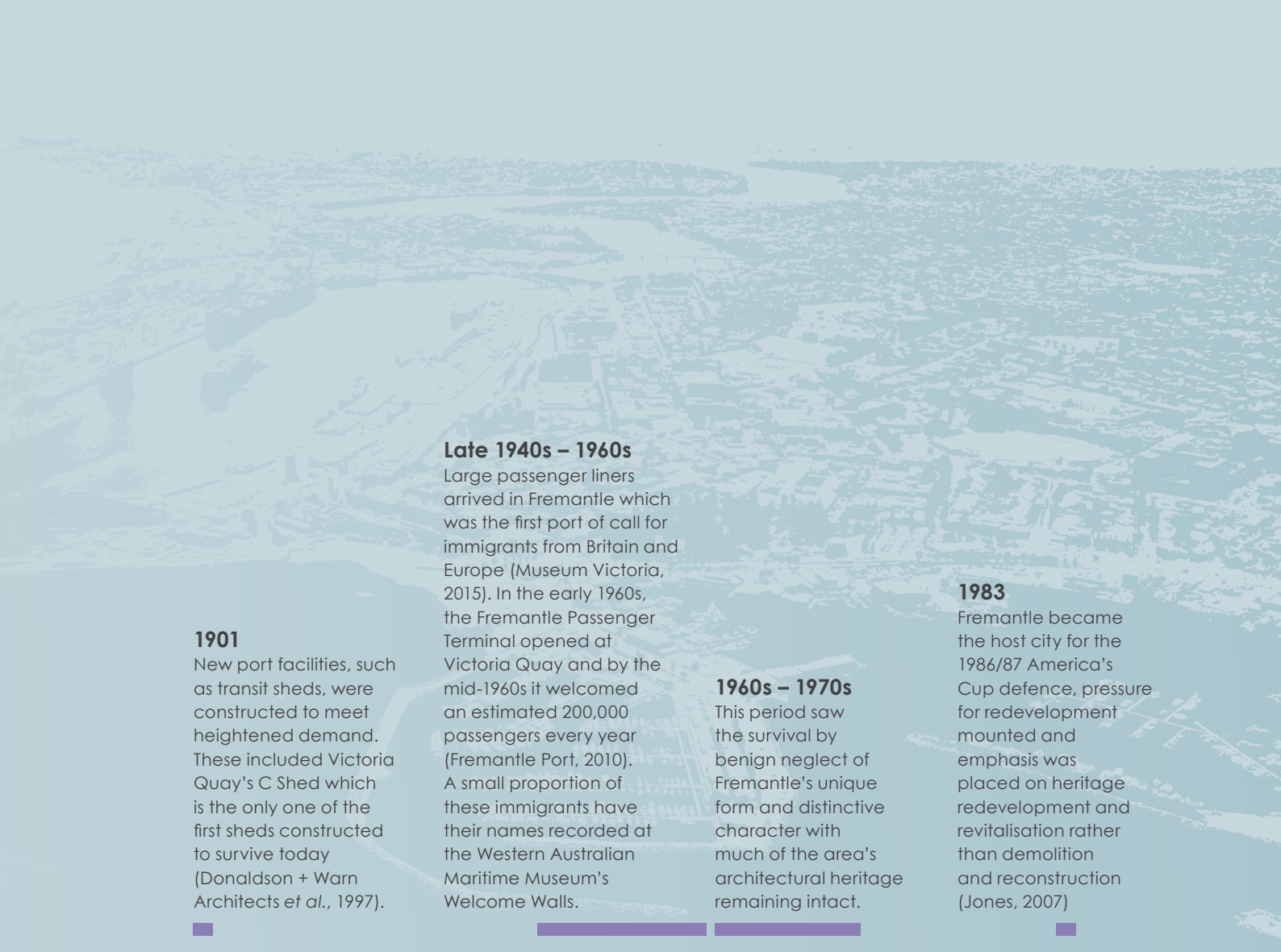
Fremantle's inner harbour and North and South Mole were constructed following the removal of the limestone bar and sand shoals at the river mouth by engineer-in-chief CY O'Connor. As a result, by 1900 Fremantle had supplanted Albany as the western port of call for Royal Mail (Donaldson + Warn Architects *et al.*, 1997).

1848

Fremantle's population reaches 426 people (Jones, 2007).

1870 – 1880

An economic downturn grips the colony following the end of convict transportation, but Fremantle's Long Jetty continues to be expanded to cater for timber and agricultural exports (Donaldson + Warn Architects *et al.*, 1997).



1901

New port facilities, such as transit sheds, were constructed to meet heightened demand. These included Victoria Quay's C Shed which is the only one of the first sheds constructed to survive today (Donaldson + Warn Architects *et al.*, 1997).

Late 1940s – 1960s

Large passenger liners arrived in Fremantle which was the first port of call for immigrants from Britain and Europe (Museum Victoria, 2015). In the early 1960s, the Fremantle Passenger Terminal opened at Victoria Quay and by the mid-1960s it welcomed an estimated 200,000 passengers every year (Fremantle Port, 2010). A small proportion of these immigrants have their names recorded at the Western Australian Maritime Museum's Welcome Walls.

1960s – 1970s

This period saw the survival by benign neglect of Fremantle's unique form and distinctive character with much of the area's architectural heritage remaining intact.

1983

Fremantle became the host city for the 1986/87 America's Cup defence, pressure for redevelopment mounted and emphasis was placed on heritage redevelopment and revitalisation rather than demolition and reconstruction (Jones, 2007)

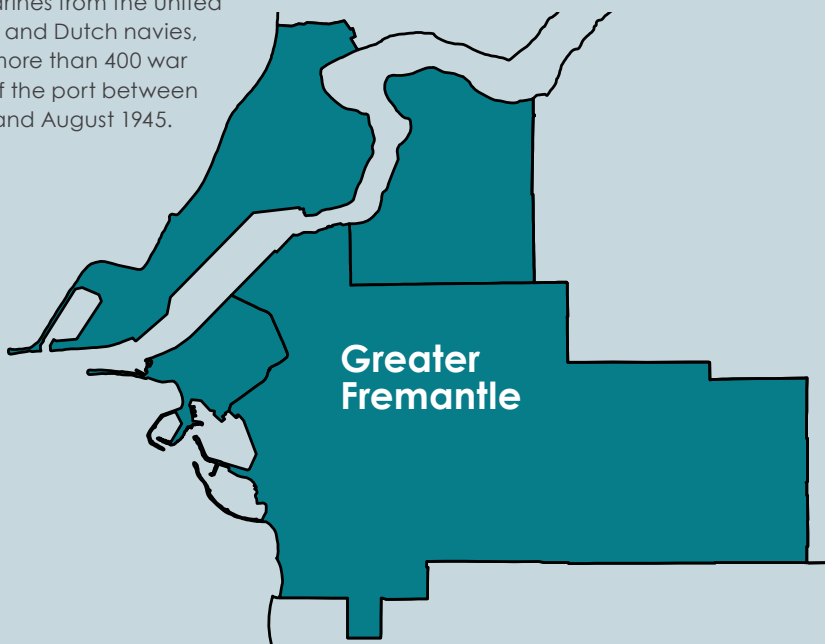
1930

1960

1990

1942 – 1945

Fremantle Port was transformed into the largest WWII allied submarine base in the Southern Hemisphere, with more than 170 Allied submarines from the United States, British and Dutch navies, who made more than 400 war patrols out of the port between March 1942 and August 1945.



TOURISM AND HOSPITALITY

Fremantle is among the most visited tourist destinations in the Perth metropolitan region outside the Central Business District. Indeed, a recent *Lonely Planet* guide ranked Fremantle as one of the top 10 'must see' destinations globally, describing it as "a raffish harbour town with sea-salty soul to burn" (Acott, 2015). It went on to comment that "Fremantle thrums with live music rooms, hipster bars, boutique hotels, left-field bookshops, craft beer breweries, Indian Ocean seafood shacks, buskers, beaches and students on the run from the books".

Fremantle attracts an estimated 238,100 overnight

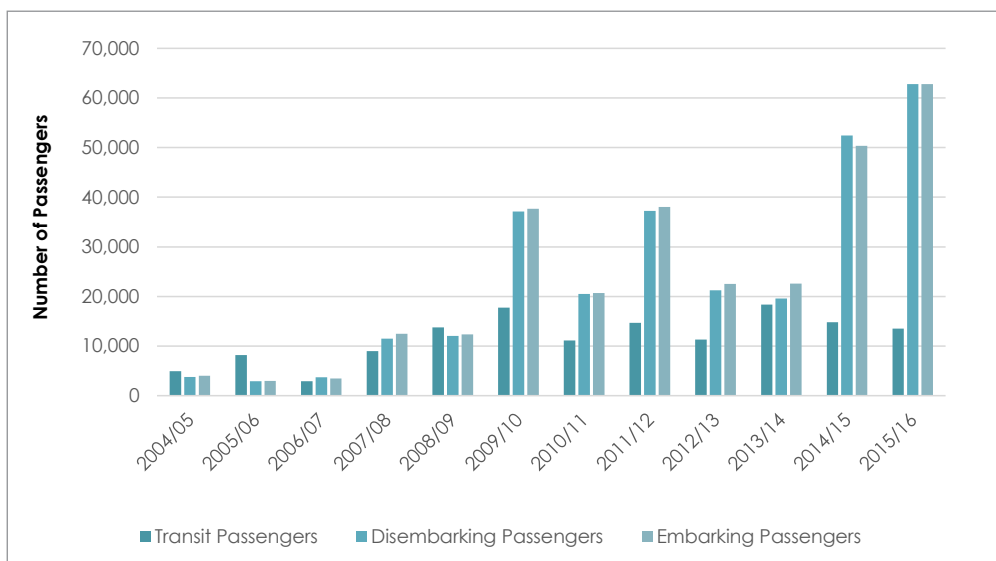
visitors per annum who spend a total of 1,556,100 nights in the local area (Table 4). According to Tourism WA (2014), it is estimated that 6 per cent of intrastate visitors; 8 per cent of interstate visitors; and 6 per cent of international visitors to the Perth region visit Fremantle. Tourists who choose to stay for one or more nights in Fremantle are predominately intrastate or interstate visitors, and primarily stay in Fremantle for holiday or leisure purposes. Visiting friends or relatives is the second most common reason stated for overnight visits to Fremantle.

Fremantle is also an increasingly popular cruise destination. In 2012/13,

55,000 cruise passengers travelled through Fremantle Port (Figure 21). In 2014/15, the Port of Fremantle welcomed 43 cruise ships and 117,000 cruise passengers embarked, disembarked or transited through the Port. Fifty-six cruise ships are also scheduled to visit Fremantle Port in 2015/16 (Fremantle Ports, 2015:33).

Compared to inner Perth, it is evident that Fremantle's share of the overnight visitor market is significant but relatively small. By contrast, comparisons with other areas in the Perth region including Mandurah, Stirling and Swan show that Fremantle is more attractive to interstate and

FIGURE 21: NUMBER OF PASSENGERS THROUGH FREMANTLE PORT, 2004/05 TO 2015/16



Source: Fremantle Ports (2015).

TABLE 4: NUMBER AND PURPOSE OF OVERNIGHT VISITS, SELECTED DESTINATIONS, 2013/14

Destination	Number of Overnight Visitors	Number of Visitor Nights	Visitor Origin	Purpose*	Demographic profile*	Accommodation*
Fremantle	238,100	1,556,100	Intrastate: 44%	Domestic: Holiday/leisure	Domestic: Family groups & adult couples (45-64 years)	Hotel, resort, motel, motor inn
			Interstate: 36%	International: Holiday/leisure	International: Travelling alone (25-44 years)	
			International: 20%			
Perth inner	1,669,400	12,140,500	Intrastate: 38%	Domestic: Business	Domestic: Travelling alone & adult couple (25-44 years)	Hotel, resort, motel, motor inn
			Interstate: 38%	International: Holiday/leisure	International: Travelling alone (25-44 years)	
			International: 24%			
Mandurah	338,800	1,321,000	Intrastate: 85%	Domestic: Holiday/leisure	Domestic: Adult couple (25-44 years & 45-64 years)	Friends and relatives
			Interstate: 9%	International: Visiting friends or relatives	International: Travelling alone (44-65 years)	
			International: 7%			
Swan	112,300	701,000	Domestic: 88%	Domestic: Visiting friends or relatives	Domestic: Travelling alone (25-44 years)	Friends and relatives
			International: 12%	International: Visiting friends or relatives	International: Travelling alone (44-65 years)	
Stirling	159,800	1,936,900	Intrastate: 50%	Domestic: Visiting friends or relatives	Domestic: Travelling alone (25-44 years)	Friends and relatives
			Interstate: 25%	International: Visiting friends or relatives	International: Travelling alone (44-65 years)	
			International: 26%			

* Most common response only.

Source: Tourism Western Australia (2013).

international visitors and holiday/leisure travellers than other areas in the region (outside the CBD). This is likely to reflect Fremantle's relatively high national and international profile and regional role as a tourist destination.

A survey of local, regional and intrastate, interstate and overseas visitors identified the following as top reasons for visiting Fremantle: (i) dine out at a restaurant (70%); (ii) visit Fremantle Markets (50%); (iii) shop for leisure (43%); (iv) go to a pub or club (35%); and (v) shop for necessity (34%). Visitors also indicated that they are attracted to Fremantle because they perceive it as: quirky and off-beat; laid-back and welcoming; providing a unique variety of entertainment options and because they enjoy the heritage atmosphere (Metrix Consulting, 2013 pp 5). This then tends to confirm the view that one of Fremantle's unique strengths is its heritage and culture.

With 'dining at restaurants' as one of the main reason people visit Fremantle, developing a strong hospitality sector is thus central to Fremantle's economic future. Fremantle has been at the forefront of Western Australia's café and restaurant culture since the middle of last century. As a result, the character of Fremantle's food and

beverage retailers has been strongly influenced by the area's industrial and demographic heritage. Recently however, its regional influence has arguably declined as the number, quality and variety of hospitality venues in the metropolitan region has increased. As a result, characteristics that once defined Fremantle's hospitality sector, such as outdoor dining, have become commonplace.

Yet a feature that continues to distinguish hospitality in Fremantle is the area's European and fishing industry heritage, with a higher proportion of Italian, southern European and seafood restaurants listed in Fremantle compared to other regional entertainment centres. This provides a potential point of difference for Fremantle's hospitality industry but is currently perceived as a weakness by some local residents who have expressed concern regarding a lack of restaurant diversity (City of Fremantle, 2014). There is also potential for specialisation, and the development of a high-quality niche industry could assist in building a genuine local identity or brand to assist in facilitating urban resurgence.

While Fremantle is highly regarded as a visitor destination, it is evident that

there are issues that need to be addressed to further enhance its profile amidst perceptions that the area has become rundown; lacks entertainment options, particularly the city centre and west end; has high retail vacancy rates; provides insufficient retail choices; is unsafe and marred by antisocial behaviour; and is inaccessible due to a lack of parking (Metrix Consulting, 2013). These issues are consistent with those commonly identified in City of Fremantle resident surveys (Catalyse, 2015; 2012).

Key matters to address include lowering vacancy rates; delivering unique retail, hospitality and sightseeing experiences; activating and designing Fremantle's streets and visitor precincts to improve perceptions of safety; and addressing access and parking issues. It is also apparent that, despite Fremantle's significant heritage and cultural assets, these are not the major attractors to Fremantle for any visitor group and visitor experiences at strategic heritage locations including the West End and Victoria Quay, currently rate poorly. There is therefore an opportunity for initiatives to develop Fremantle's role as a vibrant centre of heritage tourism and possibly, as an Italian and European Hospitality Hub.

KNOWLEDGE, EDUCATION AND CREATIVITY

There is now a considerable body of evidence that suggests that knowledge intensive and creative industries are important drivers of urban economic growth (Kratke, 2011). Moreover, it is these industries that also help to provide the 'buzz' that contributes to vibrant and exciting urban settings (Storper and Venebles). In the case of Fremantle, one of the important stimulants in creating this 'buzz' was the establishment of the University of Notre Dame Australia in 1989. With over 6,000 students and academic programmes spanning the sciences, social sciences, humanities and health disciplines, the University has helped Fremantle to develop an identity that is focused around knowledge and innovation. Alongside this, Fremantle is also home to the Challenger Institute of Technology, which adds to the sense of a vibrant higher education sector with potential for further growth. It is not surprising that the sector is highly valued by the local community (City of Fremantle, 2014).

The education and training industry sector is a major local employer in the Greater Fremantle Region, with around 10-12 per cent

of the total Fremantle workforce between 1991 and 2011 employed in the sector. Fremantle has enjoyed a steady increase in the number of persons employed in

education and training, rising from 1,210 in 1991 to 2,077 in 2011 (Figure 22). In terms of occupational grouping, the bulk of those employed in the sector are professionals (Figure 23).

FIGURE 22: EMPLOYMENT IN EDUCATION AND TRAINING, GREATER FREMANTLE, 1991-2011

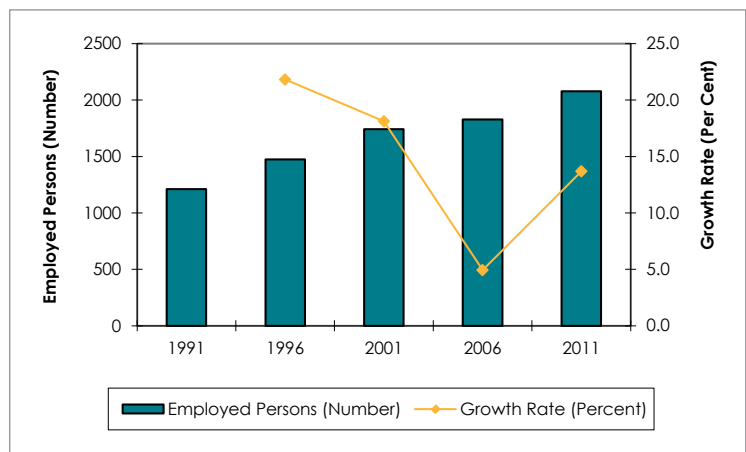
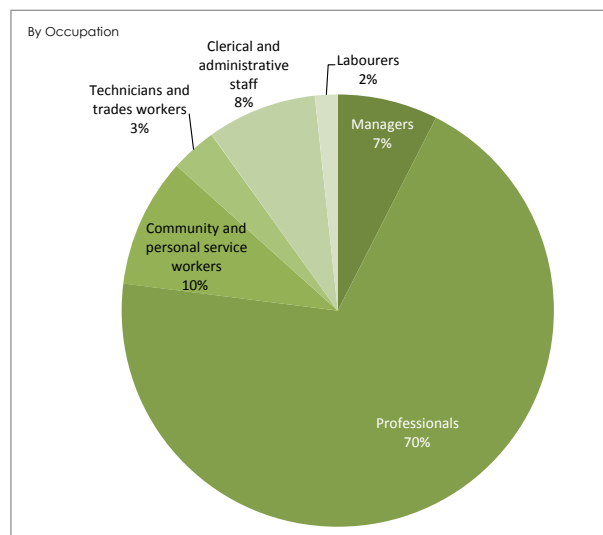
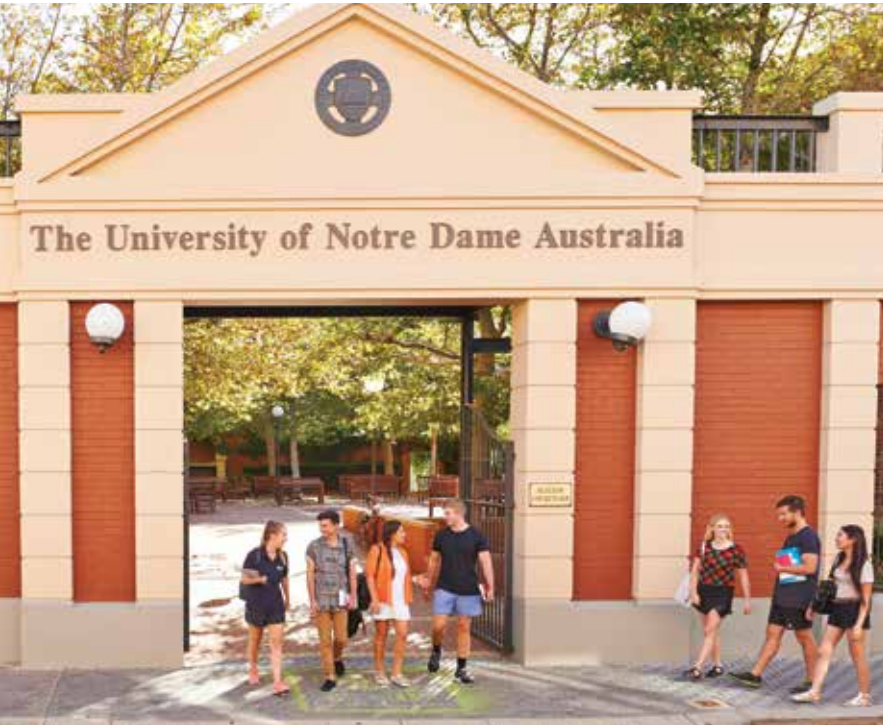


FIGURE 23: PERSONS EMPLOYED IN EDUCATION AND TRAINING BY OCCUPATION, 2011





A study of human capital across the 40 statistical local areas that make up the Perth and Peel metropolitan region found that this attribute was somewhat uneven across the Greater Fremantle region (Huddleston, 2015a).¹ In overall terms though, Fremantle has a more creative workforce than the Perth and Peel metropolitan region with greater proportions of its 2011 residents qualified in fields related to society and culture (12.9% compared to 9.7%), creative arts

¹ East Fremantle ranked 12th out of the 40 SLAs of Metro Perth and Peel in terms of the index of human capital while Fremantle – Inner and Fremantle – Outer ranked 21st and 34th, respectively. The index was constructed using qualifications, education participation and English language proficiency as indicators.

(5.6% compared to 3.1%), and natural and physical sciences (4.7% compared to 3.4%). When placed against the earlier findings on industries of economic strength and competitiveness, it is clear that the creative and knowledge industries have the potential to play a critical role in Fremantle's future. This potential is heightened by central Fremantle's walkable street pattern and heritage architecture, which has significant appeal to start-up businesses and creative industry sectors.

Fremantle's potential as a knowledge and innovation centre is heightened by other local advantages often associated with creative and knowledge

sectors, including a walkable street pattern in the downtown area; a diverse built environment with significant heritage values; an existing identity as an arts and cultural hub; a local university; health infrastructure and services; and the proximity of Fremantle Port, with capacity to develop education programs and attract innovative industries related to these sectors. As Florida (cited in Sick, 2014:72) indicated, "Start-up cities are dense and diverse. They have great neighbourhoods that are walkable and filled with the energy that smart, creative people generate when they come together."

Fremantle can capitalise on these existing strengths by: (i) Expanding the capacity of existing education providers; (ii) Maximising the role of students and inner city student housing in developing a vibrant city centre; (iii) Establishing Fremantle as a centre for education and research in the fields of history and heritage; arts and culture; health; education; media; and maritime-related sectors; and (iv) Identifying strategies to attract creative industries and foster collaboration and innovation.

SERVING THE COMMUNITY

Universities play a pivotal role in energising innovation, entrepreneurship, and business development activities on a regional, national, and even global level (Miller, 2013:135). The University of Notre Dame Australia is no exception in its endeavours to contribute to the community in a meaningful and significant way through outreach projects, community partnerships and internship links to business and industry.

The University's focus is the education and training of young people for entry to the major professions: medicine, law, teaching, nursing, accounting and finance, physiotherapy, counselling and health sciences. The University is

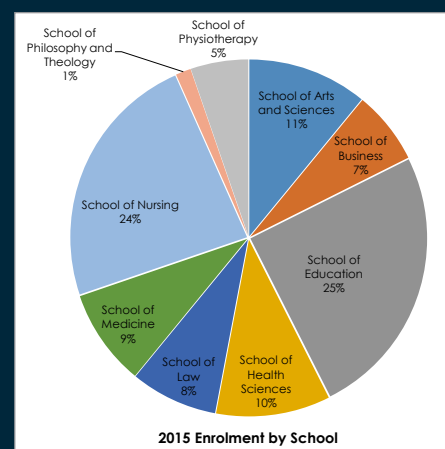
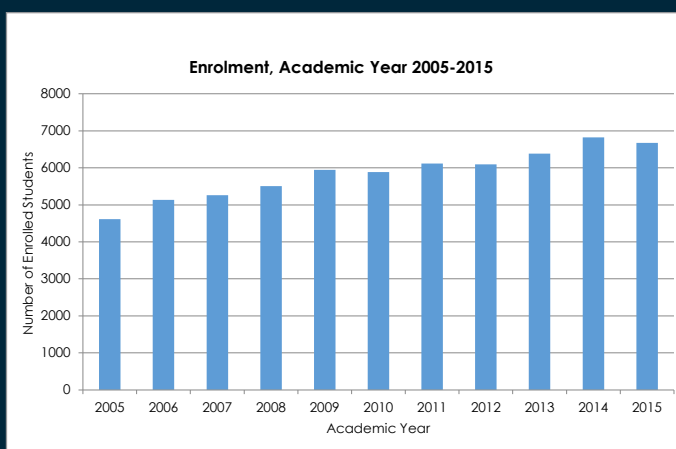
especially noteworthy for its role as a leader in the traditional professional disciplines of health and education, both of which have long associations with the mission of the Church in Australia.

Enrolment levels in the Fremantle campus in the past decade has increased steadily at a rate of 4.8 per cent per annum. From an enrolment level of 4,615 students in 2005, the total number of students in 2015 stood at 6,674.* Almost half of students currently enrolled are in the School of Education and School of Nursing. The University has a wide-ranging research and education agenda related to Indigenous Australia, which is also reflected in its involvement

in community research and vocational education in the Kimberley region.

This commitment to knowledge and Notre Dame's wider role in the community was emphasised in the August 2008 statement of its Vice-Chancellor, Celia Hammond:

"At Notre Dame we are not simply transmitters of information or creators of knowledge. Our mission will always be to teach and to educate in an environment that encourages people to seek understanding, to seek wisdom, to seek to serve, to seek to live in a way that fulfils everyone's higher purpose."



* With the decision of the State Government 14 years ago to change the starting age for school, the drop in enrolment was due to the 'half-cohort' effect impacting all universities in the State in 2015.

LIVEABILITY, HEALTH AND WELLBEING

One of the major areas of focus amongst planners, policymakers and residents in Fremantle is ensuring that it is a place that is vibrant and liveable. While 'liveability' is not a simple term to define, it is typically concerned with the range of factors that influence the quality of life within a community. This includes aspects of environmental quality, socio-economic wellbeing, social cohesion, economic prosperity and access to services. A number of these themes have been covered in earlier sections of this report, but it is important to emphasise that liveability is an integrative concept.

One of the most common community perceptions about Fremantle is the extent to which this broad notion of liveability is central to the region's character. Accordingly, it is a set of values and perceptions in need of further exploration to better determine precisely how Fremantle can capitalise on this attribute. The Greater Fremantle region is widely viewed as offering one of Perth's most liveable environments on the basis of social cohesion, diversity, quality of built environment, natural amenities and community facilities and infrastructure. It also has a strong sense of identity

and place. While there are numerous indicators of this, it is perhaps most evident in the strong sense of sporting cultures in the region. The identities forged around the America's Cup,

the Fremantle Dockers football club and even the local Western Australian Football League clubs East and South Fremantle are indicative of this.

FIGURE 24: EMPLOYMENT IN HEALTH CARE AND SOCIAL SERVICES, GREATER FREMANTLE, 1991-2011

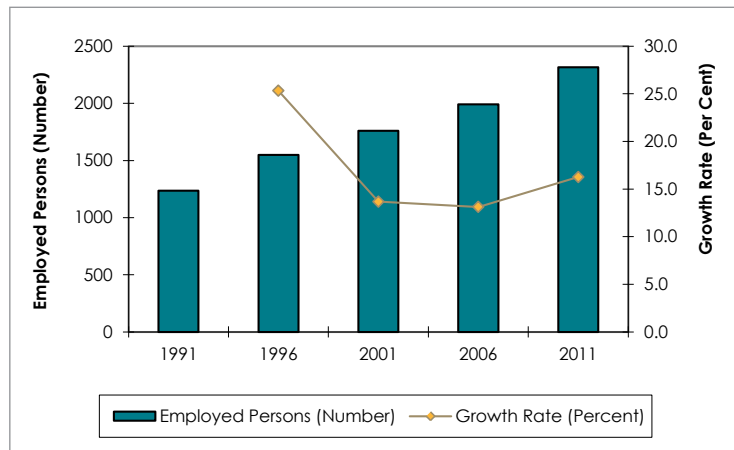
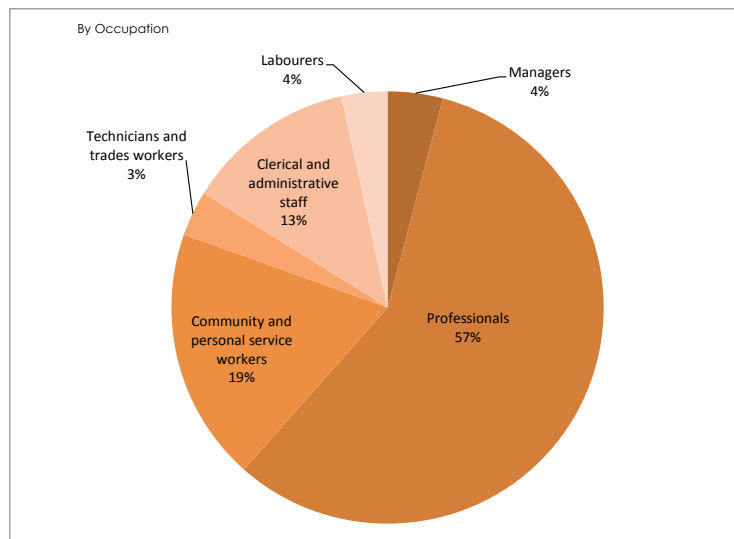


FIGURE 25: PERSONS EMPLOYED IN HEALTH CARE AND SOCIAL SERVICES BY OCCUPATION, 2011



Other domains of liveability are also critical to Fremantle. Indeed, a review of the domains considered to be important components of liveability stressed the role of health and social services which include health care, childcare and youth services, maternal services, senior citizens organisations, community centres, and public amenities (Badland *et al.*, 2014:66). This augurs well for Fremantle, given that its role as a health service centre has been widely identified as one of the city's strengths, particularly by older people living in the city. Fremantle has had a long-term role as a regional health service centre and home to major health infrastructure including Fremantle Hospital. It has also long been a significant cluster of specialist health care providers across a range of areas of practice. This means not only is the availability and quality of the health and social service sector an important contributor to liveability, but it has traditionally been a significant area of employment and competitive advantage.

The importance of health care and social assistance sector is evident in data on employment. In 1991, the health and community services sector employed a total of 1,236 persons in Greater Fremantle,

accounting for 10.5 per cent of total employment. This proportion had increased to almost 14 per cent of total employment in 2011, with employment in the health care and social services rising to 2,316 in 2011 (Figure 24). More than half of those employed in the sector in 2011 were professionals, while almost twenty per cent were community and personal service workers (Figure 25).

There are however, emerging challenges to Fremantle's strategic advantage in the health sector. The opening of Fiona Stanley Hospital in February 2015 saw Fremantle Hospital become a specialist facility and its emergency department closed. While this will possibly result in a significant reduction in health sector jobs in the area, it is evident that the delivery of high quality health services is a key priority for Fremantle's future. This increasing demand for high-quality health services is likely to ensure that Fremantle maintains a key role as a health sector hub into the future with "ongoing upgrades to the existing building scheduled until 2020 to ensure the right facilities are in place to enable Fremantle Hospital to concentrate on meeting growing demand for elective surgery and services important to the local community"



(Fremantle Hospital and Health Service, 2015). This includes aged care/ subacute care, secondary rehabilitation, mental health, elective surgery and general medical services. As such, strategic opportunities include: (i) Establishing Fremantle as a regional centre for aged care; and (ii) Building Fremantle's role as a centre for health (including allied health) education.



KEY FINDINGS

This report has highlighted the extent to which Fremantle has experienced a number of dynamic changes over the recent decades that has reshaped its economy, demography, socio-economic structure and built environment. It has also focused on some of the key strengths and opportunities that Fremantle has, and that have the potential to lead to a vibrant, prosperous and sustainable future. This section draws together 14 high level findings that help to underpin dialogues about the region's future.

These findings do not aim to offer recommendations or solutions for Fremantle, but should serve as a basis for discussion and debate about the future of the region. Addressing the findings requires leadership from across the community, business, non-governmental institutions and all tiers of governments. The experience of other cities suggests a coordinated, cross-sectoral leadership is required if key issues are to be addressed.

Key Finding 1: Fremantle's Regional Role

Over the past 60 years, Fremantle's position within the metropolitan urban hierarchy has diminished considerably as a result of the emergence of new regional centres, new transport regimes, the changing geography of urban investment, and shifting consumer tastes and behaviours. In this more competitive mosaic, Fremantle needs to understand and promote its unique locational advantages and enhance local assets.

Key Finding 2: A Boom Bypassed?

The population dynamics of the past decade suggest Fremantle did not share in the growth experienced in the Perth and Peel metropolitan region as a result of the recent resources boom. The population increased only marginally, and while there were quite high numbers of in-migrants, this was countered by relatively high out-migration. There is also a trend towards an ageing population that is consistent with that occurring across metropolitan Perth and Peel.

Key Finding 3: The Value of Ethnic Diversity

One of Fremantle's most widely recognised characteristics is its level of ethnic diversity. This is in part linked to the Port's rich migration history as a key entry point for many new arrivals prior to the late 1960s. More important however, is the diverse residential population that has shaped local cultures, institutions and industries. Indeed, this ethnic diversity is critical in terms of Fremantle's identity and locational advantage.

Key Finding 4: Socio-economic Wellbeing and Stress

In broad terms, levels of wealth are more evenly distributed across Fremantle than for Perth and Peel as a whole, though this does not mean that there are no significant gaps between wealthier and poorer areas. Importantly, the relatively high cost of housing is a source of economic stress for some households and is likely to be a barrier to higher rates of in-migration.



**Key Finding 5:
The Need for
Housing Diversity**

While the Greater Fremantle region has levels of housing diversity that tend to be higher than much of the metropolitan Perth and Peel region, it is nevertheless still oriented towards the detached house on a suburban block. There appears to be a critical gap in the housing market for higher density dwellings. This gap is an active contributor to the housing affordability issues identified in Fremantle.

**Key Finding 6:
A Dynamic
Economic Base**

The Fremantle labour market and economy is dynamic and performs well in a number of areas. It has areas of strength that are not necessarily replicated in other parts of the Perth metropolitan and Peel region, and this provides an opportunity to capitalise on these high performing areas of specialisation. Notable here are transport and related activities, arts and recreation, health care, and accommodation and food services.

**Key Finding 7:
Local (Un)
competitiveness?**

The results of an analysis of local economic competitiveness suggest that this is a major barrier to economic growth and development. While Greater

Fremantle has a number of strongly performing sectors, the analysis suggests these are not reaching their full potential because of particular local factors. While the analysis did not pinpoint these, they can include issues related to infrastructure, land costs and availability, governance and regulation, and human capital. More research is needed to identify the specific competitive constraints, but it is clear that this is an area that requires considerable attention from policymakers and the private sector.

**Key Finding 8:
The Future of Retailing**

Closely related to Key Finding 7, the report found that retail trade was a sector in serious decline. Yet, this sector is still the third largest employer in the Greater Fremantle region. Local competitive constraints, growing competition from other retail centres, and changing consumer tastes all help explain the decline in this sector. Further decline in the sector will have significant impacts not only on the vibrancy of Fremantle, but also its economic performance.

**Key Finding 9:
Transport**

A consistent set of themes emerged around transport. Indeed, transport is a source of considerable public debate ranging across issues related to freight

logistics, congestion, inter-modal connectivity, public transport, and sustainable transport. It is clear that these issues are not only divisive, but that they have implications for economic development, liveability and accessibility.

Key Finding 10:

A Port City

Much is often made of Fremantle's historic connection with maritime industries and trade. Yet, it is clear that Fremantle Port is one of the most critical parts of both the Fremantle and Perth metropolitan economies. It is a vital articulation point between the global economy and Western Australia, and underpins economic activity and employment across a range of sectors. Yet it is clear that the Port faces challenges associated with cross-modal transport linkages and other constraints. Long-term planning around the future of the Port to ensure its continued success is critical to the future of Fremantle. It is also apparent that the Port is part of Fremantle's essential character and critical to its identity and heritage.

Key Finding 11:

Heritage and Culture

One of Fremantle's most significant assets is its heritage and culture. While Fremantle has an outstanding architectural heritage, less is generally

made of its Aboriginal and ethnic heritage. There is also a strong tradition in the arts and creative industries that offers Fremantle a unique competitive advantage. While the ethnic diversity of Fremantle has been critical to the development of its restaurant and café culture, it is typically underplayed as a 'selling point' for visitors and local residents. A set of active strategies around heritage and culture has the potential to yield considerable value in terms of both economic development and vibrancy and liveability.

Key Finding 12:

A Tourism Icon

Fremantle is globally recognised as a place that is highly attractive to tourists and local visitors. Its combination of architectural heritage, restaurants and cafés, galleries and nightlife are seen as key attractions, as is the fact that being a port city creates a unique character.

Key Finding 13:

Knowledge and Creativity

Across the developing world, one of the prime drivers of urban regeneration and growth is the combination of the knowledge economy and creative industries. Fremantle is extremely well positioned in this regard, with Notre Dame University contributing to employment

and community life. Importantly, it attracts thousands of students to central Fremantle every week. Alongside this is an emerging set of creative industries that generate employment and contribute to a vibrant urban experience. Collectively, these locational attributes have the potential to provide Fremantle with the so-called urban 'buzz' that is now seen as an important ingredient in promoting innovation and growth.

Key Finding 14:

Liveability, Health and Wellbeing

One of the important components of ensuring liveable cities is the provision of high quality services. Both the economic analysis undertaken for Fremantle and a more qualitative assessment pointed to the critical role of the health care sector. While this is experiencing challenges associated with changes to Fremantle Hospital, it is still clear that this is a sector that is important not only in terms of being a service provider, but also as a generator of employment and economic activity.

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ACKNOWLEDGMENTS

The authors acknowledge the contribution, including photos and images*, provided by the following individuals in the preparation of this report:

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Economic Development
and Marketing, City of
Fremantle

Neil Foley, Professor, School
of Earth and Environment,
The University of Western
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Michael Gregg, Curator,
Maritime History
Department Image
Collection, WA Museum
– Maritime

Graham Harvey, UniPrint,
The University of Western
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Tonts, M., Huddleston, V., Martinus, K. and Davis, G. (2015)
Fremantle as a re-connected city, a FACTBase Special Report,
The University of Western Australia and Committee for Perth, Perth.



Future Freo is a project of the Committee for Perth and funded by the following organisations:



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