

NINGALOO REGION

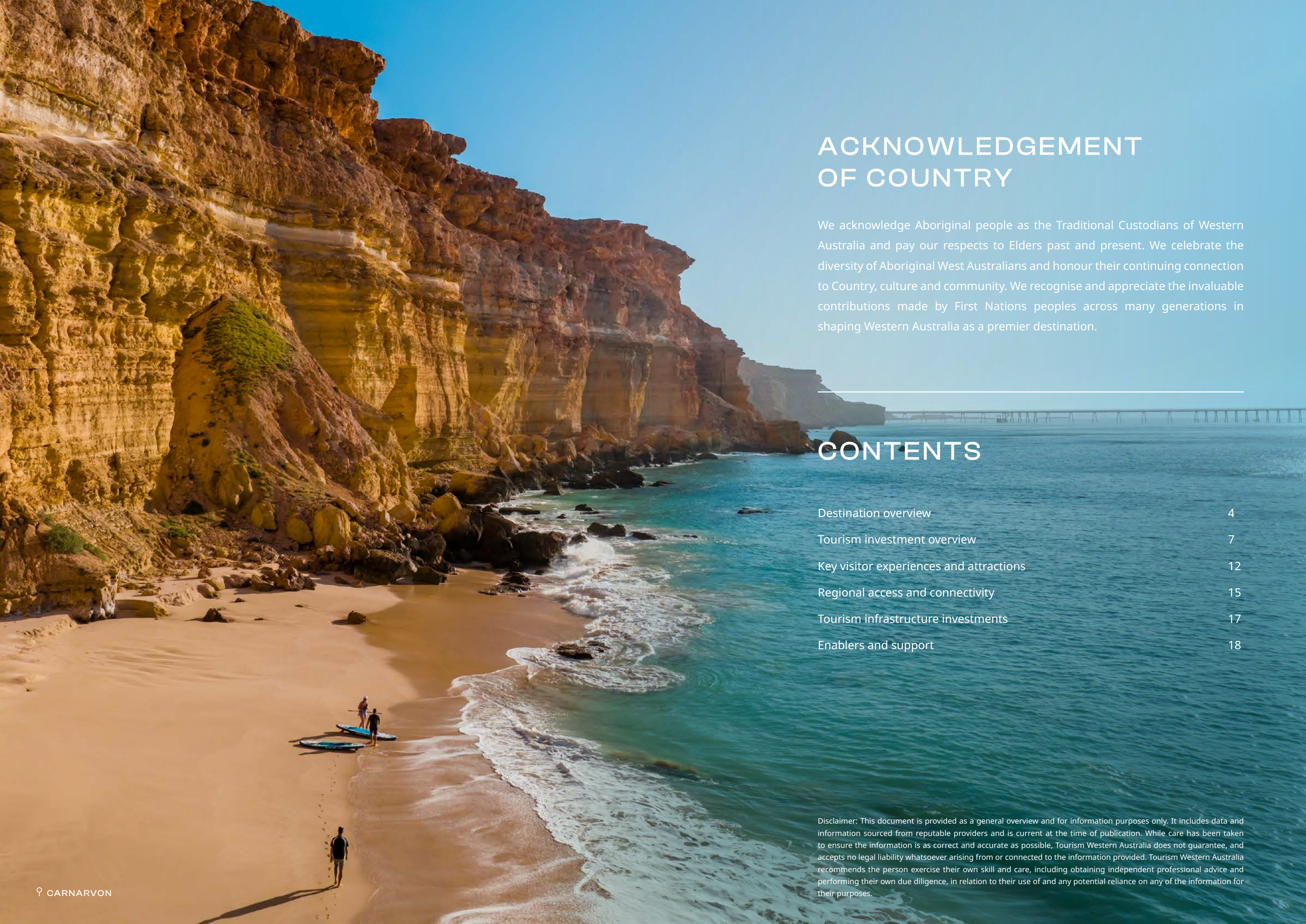
TOURISM INVESTMENT PROFILE



Tourism
WESTERN AUSTRALIA

WESTERN
AUSTRALIA
WALKING ON A DREAM

♀ NINGALOO REEF | NYINGGULU



ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Aboriginal people as the Traditional Custodians of Western Australia and pay our respects to Elders past and present. We celebrate the diversity of Aboriginal West Australians and honour their continuing connection to Country, culture and community. We recognise and appreciate the invaluable contributions made by First Nations peoples across many generations in shaping Western Australia as a premier destination.

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Disclaimer: This document is provided as a general overview and for information purposes only. It includes data and information sourced from reputable providers and is current at the time of publication. While care has been taken to ensure the information is as correct and accurate as possible, Tourism Western Australia does not guarantee, and accepts no legal liability whatsoever arising from or connected to the information provided. Tourism Western Australia recommends the person exercise their own skill and care, including obtaining independent professional advice and performing their own due diligence, in relation to their use of and any potential reliance on any of the information for their purposes.

DESTINATION OVERVIEW

The Ningaloo region is home to the World Heritage-listed Ningaloo Reef — the world’s largest fringing reef — and a spectacular convergence of marine and outback landscapes. The region offers visitors a rare opportunity to step directly off the beach and into a thriving underwater ecosystem.

Exmouth serves as the region’s northern gateway, with Cape Range National Park offering pristine beaches, rugged limestone ranges, and access to experiences like swimming with whale sharks, manta rays, and humpback whales. South of Exmouth, Coral Bay offers a laid-back, coastal atmosphere, where the reef lies just metres from shore and can be accessed from the beach year-round.

Further south, Carnarvon provides a hub of adventure and relaxation, with its fertile Gascoyne food bowl, cultural and heritage sites, and launch point for exploring inland gorges and authentic station stay experiences.

The Ningaloo region appeals to eco-travellers, marine enthusiasts, and nature seekers who are drawn to its beauty, environmental significance, and relaxed, small-town feel. It is one of the few places in the world where world-class reef, desert, and coastline exist in proximity and remain so accessible.



♀ CORAL BAY



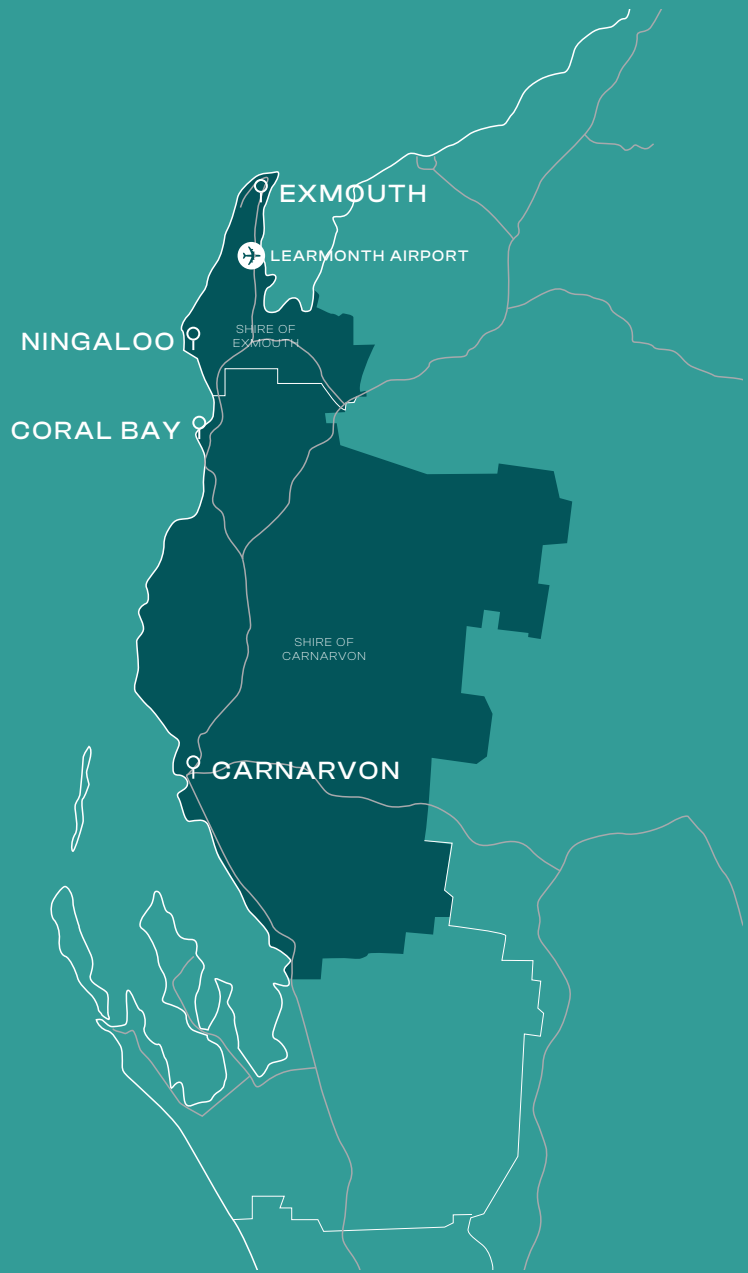
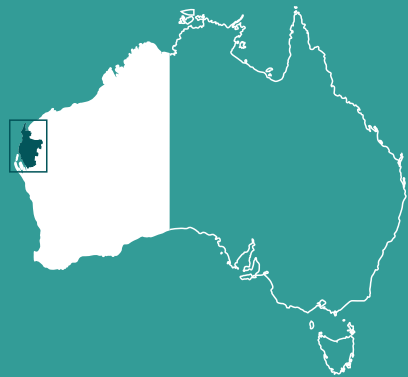
A spectacular **600 km** stretch of coast line



Almost **1 million** hectares of pristine national parks




One of few places in the world to **swim with whale sharks** in the wild



2024

VISITORS & NIGHTS¹

 **46,000**
day trip visitors

 **267,000**
overnight visitors

 **2.2 MILLION**
visitor nights


SOURCE: TRA (2025)

VISITOR SPENDING²

 **\$286 MILLION**
visitor spending

SOURCE: TRA (2025)

MAJOR DRAWCARDS

 **NINGALOO REEF**
218,000 visitors per year

SOURCE: TRA (2025)

 **CAPE RANGE NATIONAL PARK**
517,000 visitors per year

SOURCE: TRA (2025)

 **CORAL BAY**
110,000 visitors per year

SOURCE: TRA (2025)



TOURISM INVESTMENT OVERVIEW

The Ningaloo region attracts nature-driven, experience-seeking travellers who value close encounters with iconic marine life, dramatic landscapes, and low-impact tourism. It's home to some of the world's most accessible fringing reef, offering rare opportunities to swim with whale sharks, manta rays and humpback whales in the wild.

Accommodation in Exmouth and Coral Bay continues to perform strongly, but supply is under growing pressure. Planned upgrades will improve quality, but shortfalls remain in overall capacity and in the availability of premium product. Opportunities exist to develop new

short-stay accommodation offerings to meet identified market gaps and align with the needs of high-yield travellers.

Demand for environmentally conscious, experience-led product is growing, and Ningaloo is well placed to deliver. The region is uniquely positioned to capitalise on global trends toward authenticity, nature connection and regenerative travel, with significant potential to grow premium, low-impact visitor experiences and accommodation offerings that protect and celebrate its natural and cultural assets.



📍 TURQUOISE BAY, EXMOUTH

ACCOMMODATION INVESTMENT OPPORTUNITIES



PREMIUM COASTAL & BOUTIQUE VILLAS

There is market demand for more high-end villas and boutique retreats targeting luxury travellers across the region. These offerings help relieve peak-season pressure while aligning with the high-yield traveller seeking unique coastal and marine-based experiences.



OFF-GRID & SUSTAINABLE ACCOMMODATION

The region is well positioned to support low-impact, off grid accommodation aligned with reef conservation and sustainability goals. This appeals to nature-focused travellers and enables investment that supports both demand growth and environmental stewardship.



RESORT EXPANSION & UPGRADES

The Ningaloo region offers a strong case for reinvestment in existing resort properties to boost capacity, enhance guest experience, and target high-yield segments. Modelling points to a growing shortfall in hotel rooms in Exmouth — 426 by 2035, increasing to 825 by 2045¹ — strengthening the case for repositioning and expansion. Notably, 35 per cent of the projected gap is in premium resorts and hotels.

For a snapshot of tourism investment opportunities on offer in the Ningaloo region and in broader Western Australia, visit [here](#).



IMMERSIVE ECO STAYS

Opportunity exists to create new eco-resorts, glamping, and safari-style accommodation near Cape Range and Exmouth. These models also present partnership opportunities with Traditional Owners to embed cultural interpretation and deliver shared benefits.



DELUXE CARAVAN PARKS & CAMPGROUNDS

The Ningaloo region presents strong potential for development or expansion of premium caravan parks with upgraded amenities (e.g. glamping pods, eco-cabins, resort-style features). These offerings can better serve seasonal and self-drive markets and align with priorities identified in the Exmouth Accommodation Study.



STATION STAYS

There is strong potential to expand station stay accommodation offerings in the Ningaloo region, building on growing demand for authentic pastoral experiences that blend comfort with character. These offerings appeal to the self-drive and adventure market and represent a proven draw card, with further investment and activation expected in the short to medium term.

OTHER TOURISM OPPORTUNITIES



CRUISE & COASTAL EXCURSIONS

Capitalise on growing cruise and leisure travel markets through premium shore excursions and tailored marine-based experiences.

- Expanding the offering of day tours, wildlife encounters (e.g. whale sharks, manta rays, turtles)
- Premium charters and guided experiences
- Cultural storytelling and interpretation integrated into tours by Aboriginal guides



REEF-BASED & MARINE ECO-TOURISM

Create immersive, low-impact experiences that connect visitors to the Ningaloo Reef while supporting marine conservation.

- Underwater observatories and snorkel trails
- Semi-submersible and glass-bottom boat tours
- Coral restoration and “tourism for conservation” products
- Visitor-funded reef regeneration or conservation initiatives



SEASONAL & NICHE EXPERIENCE DEVELOPMENT

Attract off-peak visitation through targeted experiences that align with nature’s rhythms and cultural calendars.

- Inland day tours, wellness retreats, and photographic safaris, including marine photography experiences
- Events and retreats during shoulder periods
- Seasonal marine activities (e.g. turtle nesting, manta rays)
- Cultural and Aboriginal events and festivals that extend visitation beyond peak times



HOSPITALITY & RETAIL

Unlock opportunities in high-yield hospitality and curated retail that elevate the visitor experience and extend local spend.

- Higher-end cafes, seafood restaurants, and outdoor dining
- Eco-inspired and Aboriginal-owned retail (e.g. art, bushfoods, fashion)
- Pop-ups at seasonal hotspots and festivals



SCIENCE, LEARNING & EDUCATION-BASED TOURISM

Leverage Ningaloo’s global reef status to develop compelling “stay and learn” experiences focused on marine science, education, and storytelling.

- Experiences tied to marine science and reef research (e.g. citizen science)
- Partnerships with universities, schools or conservation groups for “stay and learn” models
- Reef-themed education centres operated privately or via concession
- Aboriginal storytelling and cultural knowledge within education offerings



SUSTAINABLE & REGENERATIVE TOURISM

Partner in ventures that align with reef protection and sustainability goals, appealing to the values of eco-conscious travellers.

- Businesses aligned with not-for-profit or conservation entities
- Aboriginal-led bush tucker tours and sustainable ventures

¹ | Study of Short Stay Accommodation in Exmouth, ACIL Allen (2024)

VISITATION & ACCOMMODATION INSIGHTS



VISITORS
(000)

	2020	2021	2022	2023	2024
DOMESTIC DAY TRIP	35	45	26	72	46
DOMESTIC OVERNIGHT	257	394	250	272	233
INTERNATIONAL OVERNIGHT	12	np	21	35	34
TOTAL	304	np	297	379	313



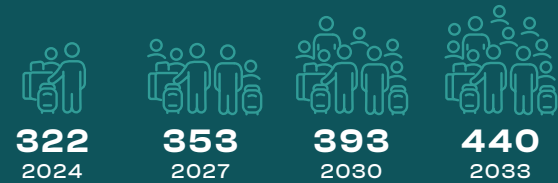
NIGHTS
(000)

	2020	2021	2022	2023	2024
DOMESTIC OVERNIGHT	1,600	2,500	1,600	2,000	1,800
INTERNATIONAL OVERNIGHT	np	np	np	405	439
TOTAL	np	np	np	2,400	2,200

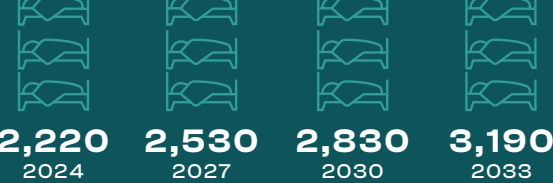
SOURCE: NVS AND IVS, TRA (2025)
np = not publishable due to small sample size

BY 2033, THE REGION COULD EXPECT 440,000 VISITORS & 3.2 MILLION VISITOR NIGHTS.

VISITORS
(000)



VISITOR NIGHTS
(000)



SOURCE: NVS AND IVS, TRA (2025) & TOURISM FORECASTS FOR AUSTRALIA 2024 TO 2029, TRA



\$287 million in total
visitor spending
YE December 2024



+17% growth in
visitor spending
from 2019



90% of spending
generated by
overnight visitors

PROPERTIES REGULARLY REACH OVER 90% OCCUPANCY IN PEAK PERIODS.

2024		GROWTH FROM 2020
	83% Occupancy	 7.1 pts per year
	\$281 Average Daily Rate	 8% per year (average)
	\$232 Revenue per Available Room	 20% per year (average)

	OCCUPANCY	ADR	RevPAR
2020	54%	\$203	\$111
2021	75%	\$223	\$167
2022	73%	\$233	\$170
2023	68%	\$259	\$176
2024	83%	\$281	\$232

SOURCE: STAFFORD (2025) AND STR GLOBAL (2025)

A GROWING SHORTFALL IN EXMOUTH SIGNALS WIDER REGIONAL OPPORTUNITY

Exmouth — the Ningaloo region’s northern gateway — is forecast to require an additional 825 rooms across all accommodation types by 2045 to meet projected demand². This includes a mix of hotel and motel rooms, cabins, and sites within holiday parks and other short-term rental options.

Scenario modelling and benchmarking against comparable tourism destinations highlights the most significant shortfall in the mid-range to premium accommodation segments.

Gaps exist in high-quality beachfront resorts, boutique lodges, and integrated nature-based stays that meet visitor expectations for comfort, amenity, and proximity to key attractions.

This projected undersupply is driven by:

- High seasonal occupancy, with existing stock often operating at or near capacity during peak periods.
- Steady growth in domestic and international visitation, supported by aviation links, self-drive tourism, and world-class nature-based experiences.
- Increasing demand for experiential, sustainable, and higher-end product, particularly from high-yield travellers engaging in whale shark swims, diving, and guided eco-touring.

As the Ningaloo region continues to strengthen its global profile, Exmouth’s accommodation constraints highlight a broader investment opportunity — not only within the town, but also in complementary locations such as Coral Bay, Carnarvon and surrounds.

2 | Study of Short Stay Accommodation in Exmouth, ACIL Allen (2024)

KEY VISITOR EXPERIENCES AND ATTRACTIONS



WILDLIFE AND MARINE ENCOUNTERS

The Ningaloo region is internationally recognised for accessible marine life interactions and diverse wildlife experiences.

- **Whale Shark Swimming** – Ningaloo Reef is one of the only places on earth where visitors can swim with whale sharks in clear, warm waters (peak March to August, with sightings continuing to October).
- **Manta Ray Encounters** – Year-round opportunities to snorkel with manta rays.
- **Humpback Whale Swimming** – Seasonal tours allow visitors to swim with migrating humpbacks (July to October).
- **Dugong Spotting** – Dugongs can be found year-round at Ningaloo Reef as they are drawn to its abundant seagrass beds. Dugongs may be seen on marine interaction tours or from glass-bottom boats and kayaks — adding a rare highlight to the Ningaloo experience.

- **Snorkelling from Shore** – World-class snorkelling directly accessible from beaches such as Turquoise Bay, Coral Bay, and Lakeside.
- **Sea Kayaking and Paddleboarding** – Sheltered lagoons and bays provide ideal conditions for both guided and self-guided water adventures.

These experiences underpin nature-based tourism, attract international markets, and support sustainable wildlife interpretation ventures.



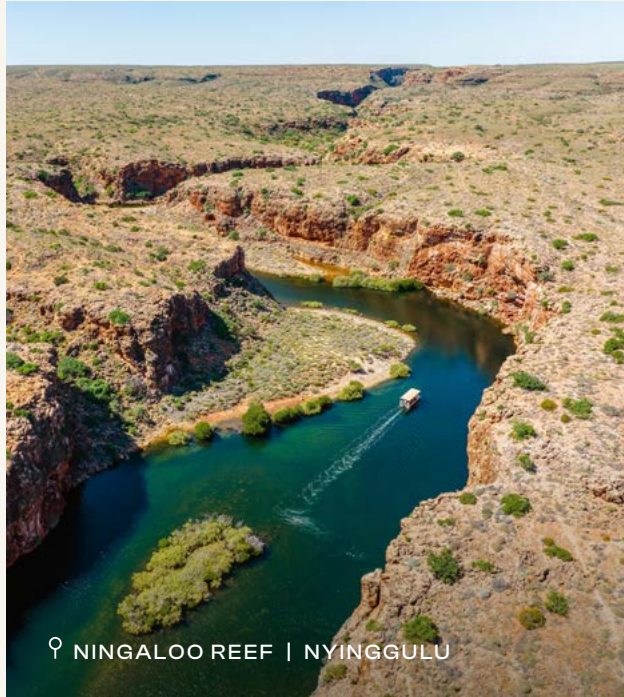
NATURE & ADVENTURE

The Ningaloo region features striking land and seascapes that showcase the diversity of Western Australia's natural beauty.

- **UNESCO World Heritage-listed Ningaloo Reef** – One of the world's longest fringing coral reefs, home to vibrant coral gardens, sea turtles, manta rays, and the iconic whale shark swim experience.
- **National Parks** – The spectacular Cape Range National Park is known for its rugged gorges and coastline. The region also provides access to the Kennedy Range National Park, offering remote hiking and striking sandstone formations.
- **Guided Nature and Adventure Tours** – A wide range of tour options are available across the region, including guided hikes, star gazing, scenic flights, quad bike adventures, 4WD safaris, and canyon explorations — providing immersive ways to experience Ningaloo's diverse landscapes.

- **Fishing** – a major draw card, attracting high-value visitors, particularly during off- and shoulder-seasons. The Exmouth Gulf is internationally recognised for its fly fishing (bonefish and permit), a catch-and-release activity that delivers strong visitor yield. Blue marlin fishing further enhances the region's reputation as a world-class nature-based destination.

These natural icons attract high-yield visitors, drive road-trip traffic, and provide a canvas for guided adventure, nature photography, and immersive storytelling experiences.



♀ NINGALOO REEF | NYINGGULU



♀ BULLARA STATION STAY, EXMOUTH

CRUISES AND ROAD TRIPS

The Ningaloo region is a premier self-drive destination, with an iconic coastal highway linking gateway towns and natural attractions.

- **The Coral Coast Highway** – Spanning 1,100 km from Perth to Exmouth, the route connects key tourism towns including Carnarvon, Coral Bay, Geraldton and Kalbarri.
- **Scenic Lookouts and Trails** – Highlights include the Mandu Mandu Gorge and Yardie Creek trails in Cape Range National Park, as well as coastal walks and lookouts around Coral Bay and the Kennedy Range.
- **Cruising and Boating** – Marine tours and small expedition cruises operate from Coral Bay and Exmouth on a year-round and seasonal basis depending on the tour type.

This touring route provides an ideal platform for developing new accommodation, guided touring, and stopover experiences.

ECO-LUXURY & IMMERSIVE STAYS

The Ningaloo region hosts a growing range of immersive and low-impact accommodation aligned with its natural values.

- **Eco-luxury stays** – provide reef-at-your-doorstep experiences with a strong focus on sustainability and comfort.
- **Station stays** – offer rustic, off-grid escapes that immerse visitors in the region's coastal wilderness and pastoral heritage.

There is clear opportunity to deliver eco-sensitive, design-led accommodation that complements the region's premium natural experiences and aligns to the expectations of high-yield travellers.



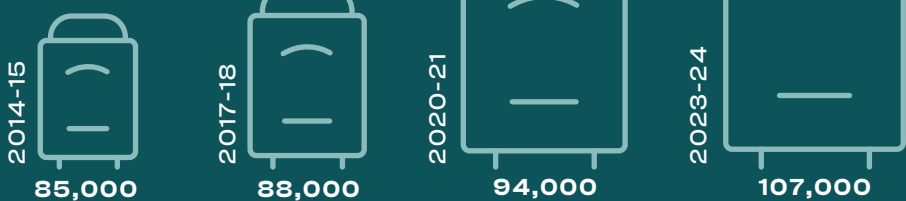
♀ WARROORA

REGIONAL ACCESS AND CONNECTIVITY

LEARMONTH (EXMOUTH) AIRPORT

TOTAL PASSENGER NUMBERS

Almost 8% average annual growth in passengers since 2015



Learmonth Airport serves as the principal aviation gateway for Exmouth and the broader Ningaloo region. Located approximately 37 kilometres south of Exmouth, the airport is owned by the Department of Defence and operated by the Shire of Exmouth under a civil lease agreement.³

The facility supports regular scheduled services to Perth, operated by both QantasLink and Network Aviation (a Qantas subsidiary), positioning Exmouth as directly connected to WA's capital and integrated into the Oneworld alliance's domestic network.

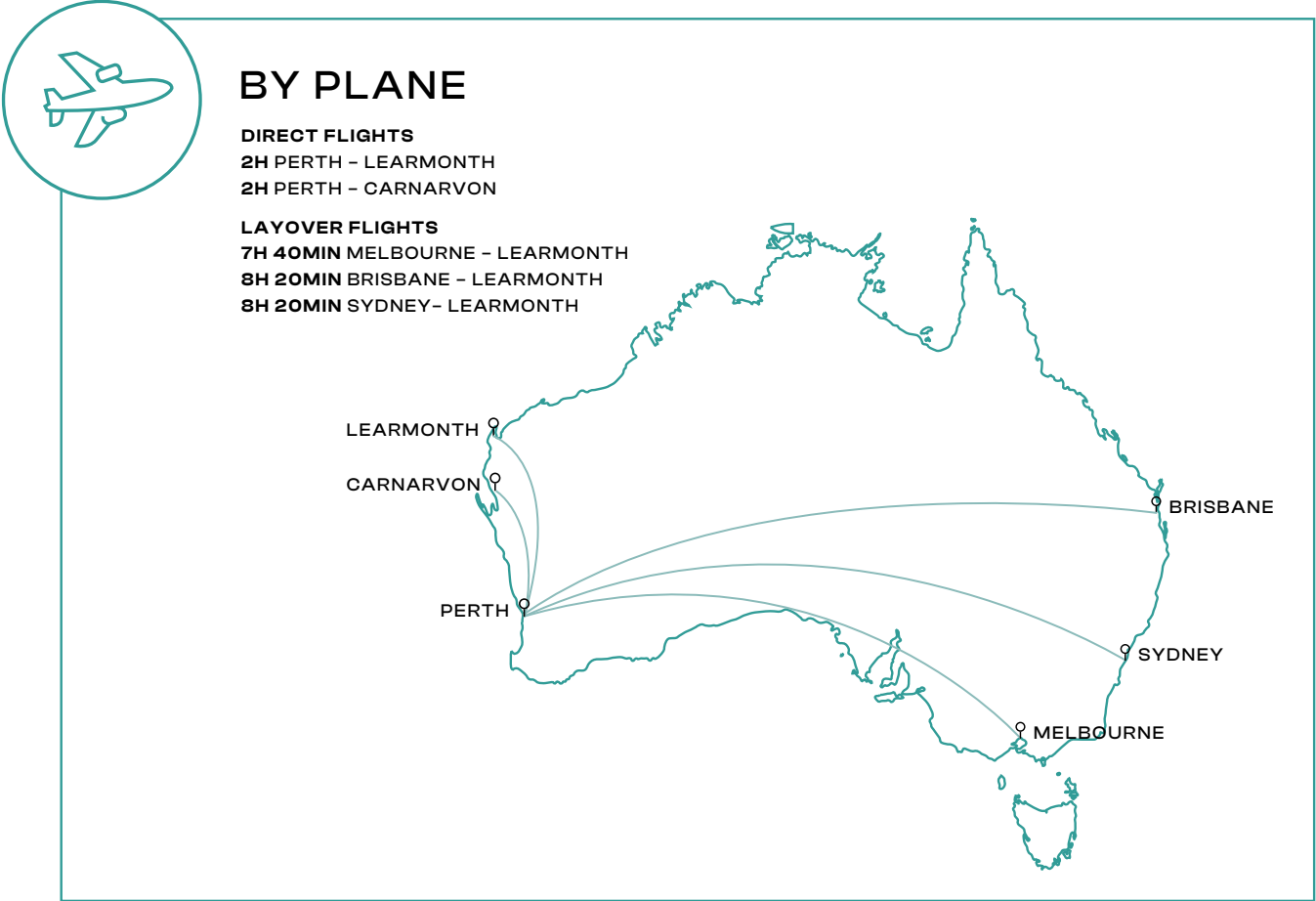
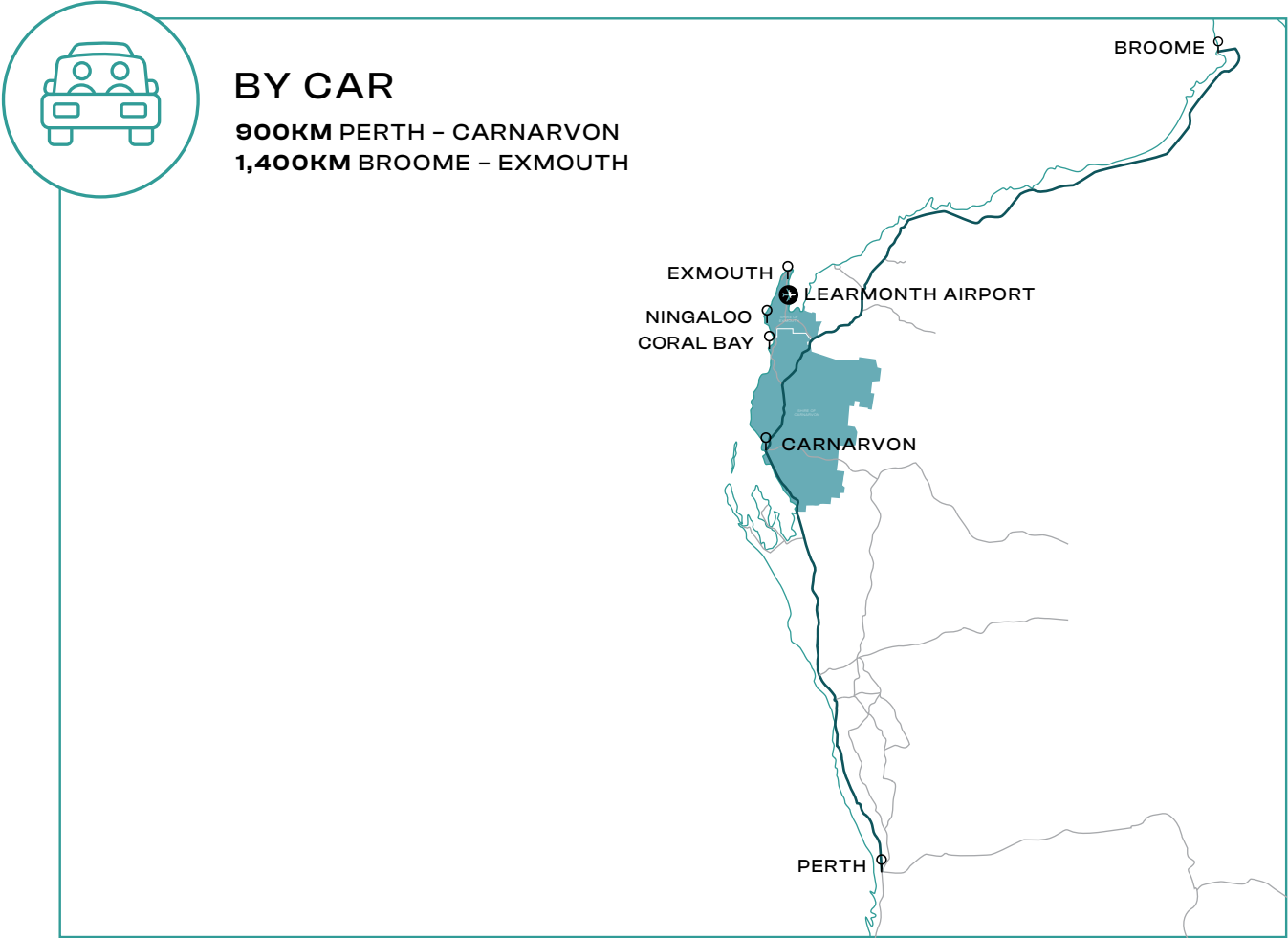
Learmonth also accommodates offshore helicopter transfers, charter flights, and microlight joy flights, supporting tourism operators offering Ningaloo Reef experiences and scenic flights. These services facilitate both visitor access and operational logistics for regional aviation providers.

Looking ahead, the airport is the focal point of a major airfield upgrade program underway at RAAF Base Learmonth. This upgrade is designed to modernise the airfield to benefit civilian passengers and operators. Construction is expected to occur between 2024 and 2028, subject to parliamentary approval and coordination with civilian aviation schedules.⁴

These developments aim to enhance Learmonth's operational capacity, support rising passenger demand, and pave the way for expanded tourism connectivity across the region.

Cruise tourism in Exmouth also continues to grow, attracting premium expedition ships as well as larger vessels, further enhancing access and strengthening the region's high-yield visitor market.

³ | Exmouth Aerodrome Master Plan (2020)
⁴ | RAAF Base Learmonth Redevelopment, Australian Department of Defence



TOURISM INFRASTRUCTURE INVESTMENTS

PUBLIC INVESTMENT PAVING THE WAY FOR PRIVATE OPPORTUNITY

In recent years, the Ningaloo region has seen a wave of transformational public and private investment in tourism infrastructure. From upgraded airports to utility upgrades, these investments are unlocking access, elevating the visitor experience, and laying the groundwork for a new era of private sector growth.

While not exhaustive, this summary highlights a range of recent investments by state and federal governments to enhance access, amenity, and tourism assets across the Ningaloo region.

OVER THE LAST TEN YEARS, MAJOR **PUBLIC INVESTMENT IN TOURISM RELATED OR SUPPORTING INFRASTRUCTURE** HAS TOTALLED ALMOST **\$915 MILLION.**

Significant private investment has also taken place, including a \$70 million resort redevelopment at Coral Bay, alongside several other tourism-related projects.

PROJECT	INVESTMENT (\$M)
LEARMONTH AIRPORT UPGRADES	\$662
TANTABIDDI BOATING FACILITY	\$116
CARNARVON AIRPORT UPGRADES	\$76
NINGALOO CENTRE (RESEARCH & VISITOR FACILITY)	\$29
EXMOUTH BOAT HARBOUR UPGRADE	\$23
CARNARVON FASCINE ENTRYWAY AND BOAT HARBOUR PEN PROJECT	\$7.0
TOTAL	\$913



📍 CORAL BAY

ENABLERS AND SUPPORT

There are considerable local efforts to market and grow the destination to drive future demand while supporting existing businesses. Investors can be confident that their ventures will be well supported through initiatives that are designed to foster a thriving environment for new and existing operators.

TOURISM WESTERN AUSTRALIA

As the State Tourism Organisation, Tourism WA plays a crucial role in marketing Western Australia as a premier travel destination by developing and implementing strategic marketing campaigns to attract both domestic and international visitors. Tourism WA also supports a range of vibrant events throughout the state and has established a vision for Perth and Western Australia to be the fastest growing events destination in the South East Asia Region.

Tourism WA is part of the Department of Creative Industries, Tourism and Sport (CITS), and works with industry to support operators, improve access to Western Australia, and attract private investment to increase the density and diversity of tourism experiences, attractions and high-quality accommodation throughout the state.

The Western Australia Visitor Economy Strategy 2033 has identified a goal to increase short-stay visitor accommodation, particularly premium accommodation, and the need to attract private sector investment into new tourism offerings throughout the state.

TOURISM INVESTMENT DELIVERY DIVISION

The Tourism Investment Delivery Division of CITS provides strategic guidance for major tourism attractions and infrastructure proposals, seeking to remove barriers to tourism investment and strengthening coordination across Government. The establishment of this unit, which also supports the Tourism Investment Committee of Cabinet, further emphasises the State Government's focus on driving tourism investment in Western Australia.



♀ CAPE RANGE NATIONAL PARK, EXMOUTH

AUSTRALIA'S CORAL COAST

Australia's Coral Coast (ACC) is the regional tourism organisation responsible for promoting the range of destinations, attractions and experiences between Cervantes and Exmouth. Through targeted campaigns, ACC markets the region's world-renowned marine life, striking natural landscapes, and road trip experiences to intrastate, interstate, and international audiences.

The Australia's Coral Coast Tourism Destination Management Plan has identified critical investment priorities including the development of new accommodation, improved aviation and cruise infrastructure, enhanced touring product, and support for experience-led attractions aligned to high-yield visitor segments.

THE NINGALOO REGION: A DREAM INVESTMENT DESTINATION



**A STUNNING AND DIVERSE COASTAL
AND MARINE LANDSCAPE BLENDING
REEF, RANGE AND COASTLINE IN ONE
ACCESSIBLE DESTINATION.**



**IMMERSIVE TOURISM EXPERIENCES
INGRAINED IN ADVENTURE AND PLACE —
ONE OF THE FEW PLACES IN THE WORLD TO
SWIM WITH WHALE SHARKS IN THE WILD.**

A GROWING TOURISM MARKET....



**3.2 MILLION
VISITOR NIGHTS**

estimated forecast by 2033 —
an increase of 45% from 2024



**NEARLY \$915 MILLION IN
GOVERNMENT INVESTMENT IN
TOURISM RELATED INFRASTRUCTURE.**

Including upgraded airports, marine facilities,
water and energy infrastructure – paving the
way for scalable private sector growth.



**A HIGH-PERFORMING
ACCOMMODATION MARKET WITH
IDENTIFIED ROOM TO GROW**

For more information, please contact invest@westernaustralia.com

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#WAtheDreamState



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