

MID WEST TOURISM ACCOMMODATION STUDY GERALDTON & KALBARRI

STAGE 1 RESEARCH

An analysis of the demand, constraints and
feasibility for visitor and tourism worker
accommodation in Geraldton and Kalbarri, WA

ACKNOWLEDGEMENT OF COUNTRY

Urbis acknowledges the Traditional Custodians of the lands we operate on.

We recognise that First Nations sovereignty was never ceded and respect First Nations peoples continuing connection to these lands, waterways and ecosystems for over 60,000 years.

We pay our respects to First Nations Elders, past and present.

The river is the symbol of the Dreaming and the journey of life. The circles and lines represent people meeting and connections across time and space. When we are working in different places, we can still be connected and work towards the same goal.

Title: Sacred River Dreaming
Artist: Hayley Pigram
Darug Nation
Sydney, NSW



01

MID WEST TOURISM OVERVIEW

KEY INSIGHTS

1

The Mid West Region has **experienced fluctuations in total visitor nights over the past decade, peaking at 3.5 million visitor nights in 2014 and again in 2019**. Notably, the region attracts a **very small number of international visitors** (less than 15% in 2023) and was less impacted by Covid-19 compared to other WA and Australian tourism markets.

2

Over the past decade, most visitors to Mid West stayed in **non-commercial accommodations, such as with family and friends or in their own homes**, followed by commercial caravan parks. However, the reasons for visiting the region paint a different picture. Based on a 5 year average, there is **a large proportion of visitors coming for business and other purposes or transit**.

3

Domestic visitors, primarily aged 50-64 and often traveling alone (most of whom are business travellers), contribute to a higher average daily spend to international visitors in 2023. **International visitors tend to be younger (20 – 34) and more likely to travel as couples**. Nonetheless, despite a lower average daily spend, their longer stays result in a higher total trip spend compared to domestic visitors.

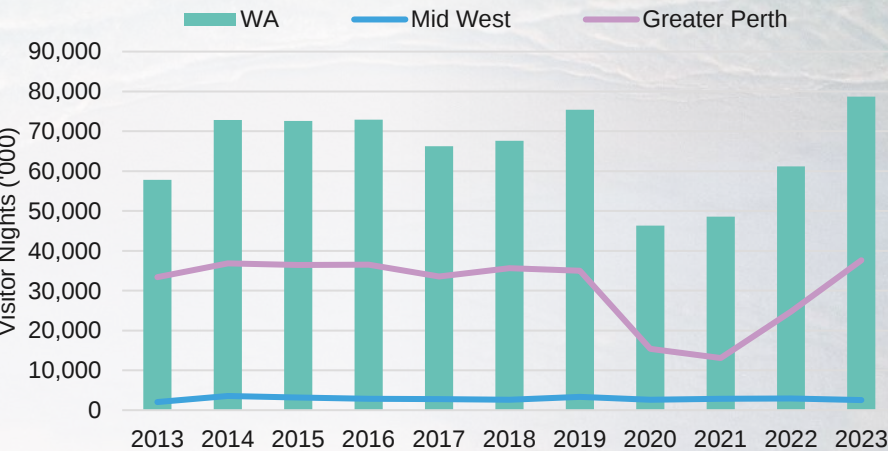
TOURISM SECTOR OVERVIEW | INTRODUCTION AND CONTEXT

The Mid West region is an emerging tourism destination in Western Australia (WA). On a five year average basis*, the Mid West region averaged 2,805,000 visitor nights annually, contributing approximately 4% to Western Australia's total. As explored in this Mid West Tourism Study, the Mid West region has potential to benefit from the strong tourism growth outlook for Western Australia and grow its share of state level visitation.

This document presents initial findings and is focused on the current and potential market for short stay accommodation in the Mid West region. It does this by assessing the future opportunities and challenges for accommodation in the Mid West, along with how growth opportunities could impact demand for accommodation. Additionally, the study reviews regional and local strategies, maps the variety of tourism experiences available and evaluates the accommodation needs of tourism workers.

**Five year average of 2016-2019 and 2023. The years 2020, 2021 and 2022 are excluded due to Covid-10 period data reliability*

Visitation to Mid West Region vs WA and Greater Perth



Source: Tourism Research Australia, Infrastructure Western Australia, Urbis
Note: There are zero international visitor numbers recorded for years 2020, 2021 and 2022 due to Covid-19 period data reliability

TOURISM SECTOR OVERVIEW | WA AND AUSTRALIA VISITOR TRENDS

Strong rebound in WA's Tourism Sector post-Covid-19

WA's tourism sector has rebounded strongly post-Covid-19, with visitor night growth at around 29% from 2022 to 2023, and is stronger than the national growth rate. Notably, WA experienced the smallest decline from 2019 to 2020 and remained the most stable from 2020 to 2022, driven largely by a robust intrastate market.

Visitor Origins to WA are diversified

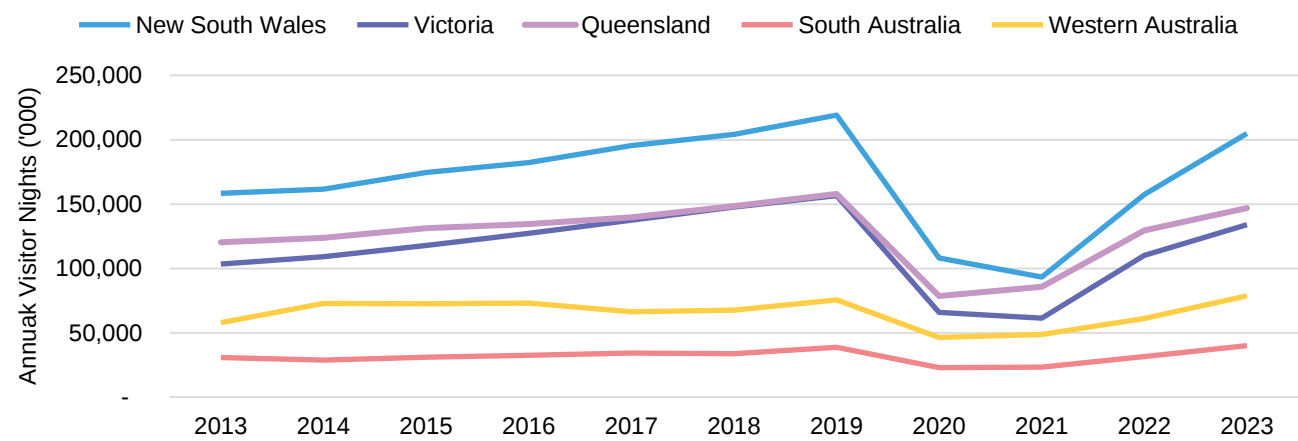
Excluding the Covid-19 period, international visitors have remained relatively stable, averaging 37% of total visitor nights over five years. WA attracts diverse visitors mainly from Western Europe, Southeast Asia and East Asia. Generally, Europeans typically seek scenic and immersive experiences, while Southeast Asians prefer relaxing stays with appealing prices.

Interstate travellers contribute the least to total visitor nights, averaging 17% over five years. Travelers from QLD, NT, and TAS have increased, adding an average of 543,000 nights per year from 2015-2019 to 2023. In contrast, travellers from ACT, VIC, SA, and NSW have all declined since the 2015-2019 average.

Visitation to WA provides a strong foundation for the Mid West and opportunities to further drive growth

Overall, the broader trends in WA highlight the region's strength and resilience as a tourism destination, providing a solid foundation for further growth in the Mid West region. Additionally, the diversity of traveler origins underscores the need for subregions to cater to varying preferences, including in terms of accommodation options. Whilst the Mid West is primarily a domestic tourism destination, an upside potential for capturing a greater share of the state's existing international visitor market must also be considered for future investment in short-stay and visitor experience infrastructure.

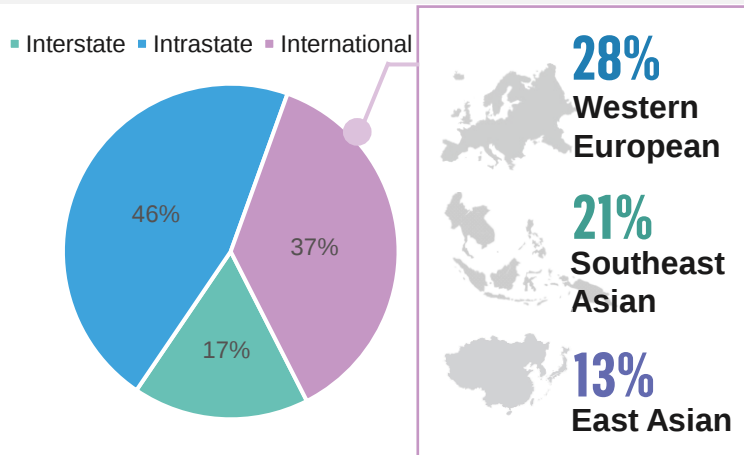
Annual Visitor Nights, Domestic and International, Australian States ('000), 2013-2023



Source: Tourism Research Australia, Urbis

Note: There are zero international visitor numbers recorded for years 2020, 2021 and 2022 due to Covid-19 period data reliability

WA Visitor Nights by Origin, 5 Year Average



Source: Tourism Research Australia, Urbis

Note: 5 Yr. Average comprises 2016 to 2019 (inclusive) and 2023 to exclude the impact of Covid-19 pandemic (2020 – 2022)

Domestic Growth Markets to WA, 2015-19 to 2023

	GROWTH FROM 5YR AVERAGE ('000)	GROWTH FROM 5YR AVERAGE (%)
QUEENSLAND	294	10%
NORTHERN TERRITORY	186	30%
TASMANIA	63	10%
AUSTRALIAN CENTRAL TERRITORY	-80	-42%
VICTORIA	-88	-2%
SOUTH AUSTRALIA	-358	-34%
NEW SOUTH WALES	-409	-13%

Source: Tourism Research Australia, Urbis

Note: Growth measured as change in visitor nights from a 5-year average of 2015-2019 to 2023

TOURISM SECTOR OVERVIEW | MID WEST VISITOR TRENDS

Variable visitation, currently 1 million nights below 2014 peak

The Mid West Region has experienced fluctuations in total visitor nights over the past decade, peaking at 3.5 million visitor nights in 2014 and again in 2019. Post the Covid-19 Pandemic, visitor nights has slowly recovered to 2.5 million nights in 2023, still a million visitors less than the peak.

Notably, the region attracts a very small number of international visitors (less than 15% in 2023), which meant it is less impacted by Covid-19 compared to the broader WA (36% in 2023) and Australian tourism markets (38% in 2023).

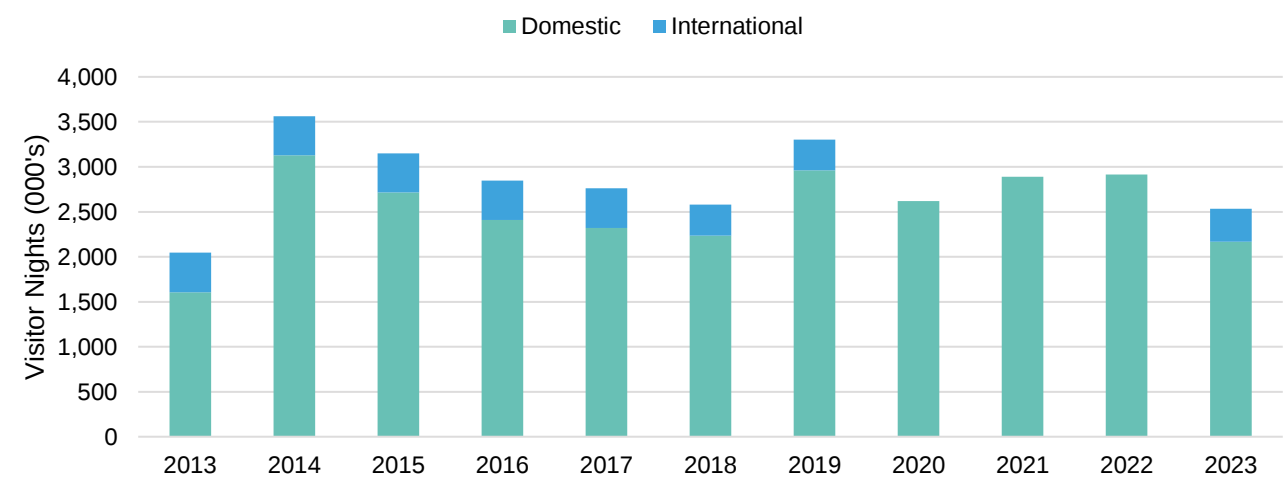
Transient workers numbers in decline

Working Holiday Visas are an indicator of longer-term international travellers in the region. They also provide an important source of casual workers in the tourism industry.

Even prior to Covid-19, working holiday visitors were in decline, dropping from around 150,000 per annum in 2016 to almost 70,000 in 2019. This decline is consistent to national trends in working holiday makers in response to broader macroeconomic conditions (i.e. exchange rate, tax-free income thresholds etc).

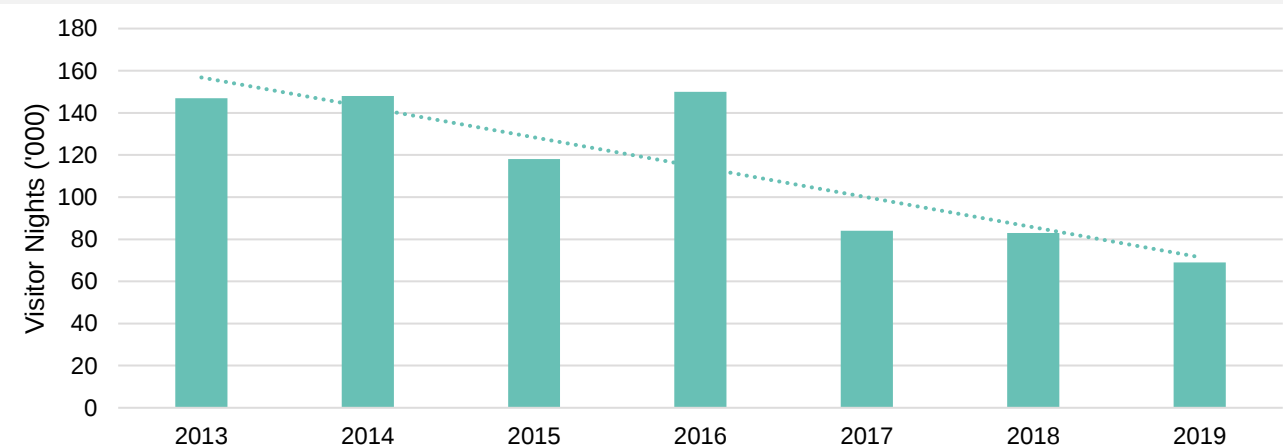
A 2024-25 federal review of regional migration may also lead to further policy changes that could remove regional and remote work requirements for working holiday maker visas. Should such policy changes eventuate, there may be even more substantial declines in the level of transient workers living and working in the Mid West region. This could result in labour shortages for local industries that rely heavily on transient workers, including the tourism sector and leading to a shift in the demand levels for tourism worker accommodation.

Visitor Nights, Mid West Region, 2013 - 2023



Source: Tourism Research Australia, Urbis
Note: There are zero international visitor numbers recorded for years 2020, 2021 and 2022 due to Covid-19 period data reliability

Working Holiday Visas (International Visitors), Mid West Region, 2013 - 2019



Source: Tourism Research Australia

TOURISM SECTOR OVERVIEW | MID WEST VISITOR TRENDS (CONT.)

Strong preference for non-commercial accommodation, particularly for caravan or camping accommodation

Over the past decade, most visitors have opted to stay in non-commercial accommodations, such as with family and friends, in their own homes and in non commercial caravan or camping accommodation. Based on a five-year average of total visitor nights for non-commercial accommodation from 2016-19 to 2023 (excluding the impact of the COVID-19 pandemic), a majority of the proportion, at 62%, were in non-commercial caravan or camping sites, while 38% were in properties owned by friends or relatives. This indicates a market gap that could be addressed with commercial caravan park accommodation.

The next most popular choice has been commercial caravan parks, while the use of unserviced rentals and hotels, resorts and motels has varied throughout the years. In 2023, these two accommodation options accounted for the lowest proportion of choices seen since 2013.

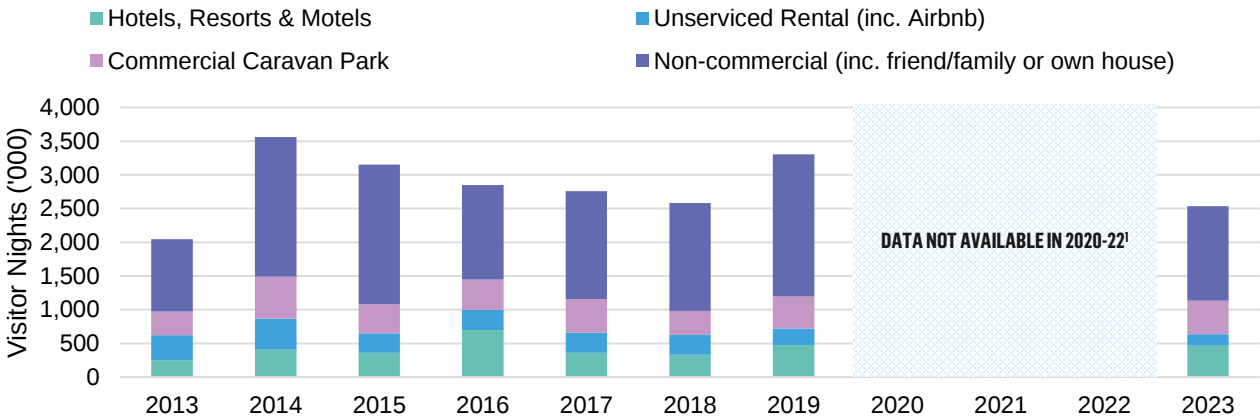
Travellers visit for business or holidays

However, the reasons for visiting the region paint a different picture. Based on a 5 year average, there is a large proportion of visitors coming for business at 41%, just slightly under holidaymakers at 43%. The smallest group, at 16%, consists of those visiting friends and family.

Spring time peak season

Whilst there are noticeable seasonal fluctuations in visitor nights these are relatively moderate, with an average 145,000 bump in September quarter nights. The Mid West region is renowned for its wildflowers, which bloom annually from autumn to spring. Whilst this does put an upwards pressure on labour demand in these months for the region, it does not face large-scale low-season closures.

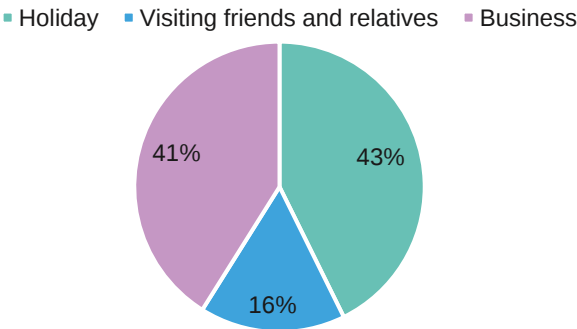
Accommodation Choice, Mid West Region, 2013-23



Source: Tourism Research Australia, Urbis

¹There are no international visitor numbers recorded for at a local-level in years 2020, 2021 and 2022 due to the Covid-19 pandemic.

Reason, 5 Yr. Average, 2016-19 to 2023



Mid West Region, Source: Tourism WA, Tourism Research Australia, Urbis

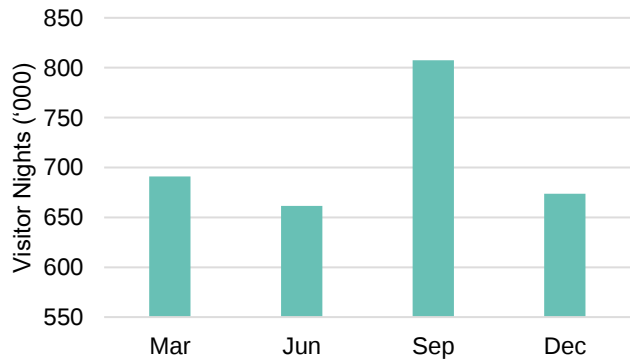
Note: 5 Yr. Average comprises 2016 to 2019 (inclusive) and 2023 to exclude the impact of Covid-19 pandemic (2020 – 2022)

¹There are no international visitor numbers recorded for at a local-level in years 2020, 2021 and 2022 due to the Covid-19 pandemic

Note: Treat visiting friends and relatives figure for 2023 with caution due to a low sample size in the TRA NVS and IVS survey.

Business includes education and employment purposes. Quarterly visitor nights figure excludes quarters from June 2020 to Dec 2022 inclusive due to unavailability of local data during the Covid-19 pandemic.

Average Quarterly Visitor Nights, 2013-23



VISITOR DEMOGRAPHICS

Notable differences exist between domestic and international visitation to the Mid West. Understanding these variations can inform short-stay preferences and guide future development segmentations to appeal to appropriate markets in the region.

Domestic visitors, primarily aged 50-64 and often traveling alone, contribute to a higher average daily spend

The 2022-2023 average shows that the predominant age group for domestic visitors was 50-64, comprising 30% of total visitation. The second largest age group was 20-34, making up 21% of overall visitors. Regarding travel parties, visitors traveling alone has also seen one of the most notable growth at 4%.

These travel demographics indicate a higher proportion of domestic spending capacity, which aligns with the higher average daily spend of \$198 noted for 2023. In contrast, the international average daily spend is significantly lower at \$87 per day.

Given that domestic visitors accounted for approximately 85% of total visitation in 2023, and there has been a decrease in international visitors, the finding indicates there is an opportunity to further assess premium and upscale offerings in the market.

International visitors tend to be younger and predominantly travel as couples

The demographic profile of international visitors contrasts with domestic trends. International visitors are predominantly younger (20-34) and more likely to travel as couples, though many still travel alone (33% to total visitation in 2023). Despite a lower average daily spend, their longer stays result in a higher total trip spend compared to domestic visitors.

MID WEST DOMESTIC VISITOR DETAILS



28%
DOMESTIC
VISITORS TRAVEL
ALONE

Predominating lifecycle group, 2022+2023 average
For comparison, lifecycle group registering the highest domestic trips in WA as of 2023 is couples with children



50-64
DOMESTIC AGE GROUP
WITH HIGHEST TRIPS

2022+2023 average (30% of visitors)
For comparison, domestic age group registering the highest trips in WA as of 2023 is 55+ (at 35%)



+4 PTS
GROWTH IN VISITORS
TRAVELLING ALONE

Percentage points growth from 2018+2019 average to 2022+2023 average.

MID WEST INTERNATIONAL VISITOR DETAILS



41%
INTERNATIONAL
VISITORS TRAVEL AS A
COUPLE

Predominating lifecycle group, 2023
For comparison, lifecycle group registering the highest international trips in WA as of 2023 is couples with children



20-34
INTERNATIONAL AGE
GROUP WITH HIGHEST
TRIPS

2023 (35% of visitors)
For comparison, international age group registering the highest trips in WA as of 2023 is 55+ (at 39%)



-5 PTS
DECLINE IN VISITORS
AGED 20-34

Percentage points decline from 2018+2019 average to 2023.

OVERNIGHT VISITOR METRICS - 2023

	AVERAGE TRIP LENGTH	AVERAGE TRIP SPEND	AVERAGE DAILY SPEND
DOMESTIC	3.6 days	\$717	\$198
INTERNATIONAL	9.0 days	\$780	\$87
TOTAL	4.0 days	\$721	\$182

Source: Tourism Research Australia, Urbis

TOURISM SECTOR OVERVIEW | GOALS & INVESTMENT

While state-level campaigns and strategies emphasise international visitors, the **Mid West Regional Tourism Development Strategy and Australia's Coral Coast Tourism Destination Management Plan** focuses on domestic visitors.

The WAVES 2023 strategy sets a 10-year plan to advance WA's visitor economy by attracting high-yield international travellers and enhancing the state's tourism infrastructure and experiences. The strategy aims to leverage post-pandemic recovery, technological advancements, and sustainable tourism trends to position Western Australia as a premier global destination. Targeted strategies have been provided for the Mid West region including the Mid West Regional Tourism Development Strategy which outlines key priorities and actions for tourism development in the region. While WA tourism campaigns emphasise attracting international visitors, the Mid West strategy focuses on domestic visitors as their priority market. Although international visitors currently make up only about 15% of total visitation to Mid West in 2023, understanding stakeholders' perspectives on this market is essential for guiding future short-stay development and potential growth. The Australia's Coral Coast Tourism Destination Management Plan outlines a 10-year vision and strategic priorities for regional tourism growth, based on product development trends, stakeholder insights, and comprehensive analysis of the visitor economy.

Key Tourism Campaigns and Strategies

WA VISITOR ECONOMY STRATEGY (WAVES) – 2033

The strategy aims to position the state as a world-class destination and grow the visitor economy to \$25 billion by 2033. Key focus areas include aviation, accommodation, events, Aboriginal tourism, and destination branding to make tourism a high-performing industry.

AUSTRALIA'S CORAL COAST TOURISM DESTINATION MANAGEMENT PLAN – 2023

The Australia's Coral Coast (ACC) Tourism Destination Management Plan (TDMP) outlines a 10-year vision to enhance tourism through strategic goals and priorities. Supported by Regional Tourism Development Strategies (RTDS), it addresses supply, demand, and capability gaps to sustainably grow the region's visitor economy.

MID WEST REGIONAL TOURISM DEVELOPMENT STRATEGY – 2023 - 2033

This 10-year strategy outlines key priorities and actions for tourism development in the Mid West region. Many of the priorities identified in the document are aspirational. They provide industry and government with the strategic direction to seek resourcing, if required, to deliver initiatives within their areas of responsibility. The strategy recognises that the Mid West includes the Australia's Coral Coast (ACC) and Australia's Golden Outback (AGO) tourism regions, which have very different tourism profiles and visions.



TOURISM SECTOR OVERVIEW | TOURISM CAMPAIGNS

This overview highlights key tourism campaigns for the Mid West region, each offering unique experiences and leveraging the area's natural attractions accessible by road. Other tourism campaigns of note include the Coral Coast Highway scenic drive campaign by the Australia's Coral Coast, which also includes several stopovers in Mid West, including Geraldton, Kalbarri, Greenough and Dongara – Port Denison. There is also the second phase of the Drive the Dream campaign just released as of the third quarter last year targeted especially for the international market and positioned to highlight WA as a premier destination for road trips.

Launched Tourism Campaigns Relevant for the Mid West



MURCHISON GEOREGION

The Murchison GeoRegion project, introduced in 2020, is Western Australia's inaugural major GeoRegion tourism initiative specifically focused on the Mid West, and developed through a partnership between the Murchison local governments and the Mid West Development Commission and RDA Mid West – Gascoyne.

Its goal is to enrich the region's tourism experience by emphasising the links between geology, landscapes, ecology, astronomical observations, and their importance to local Aboriginal culture.

Involved LGAs in the Mid West include Shires of Cue, Meekatharra, Mount Magnet, Murchison, Sandstone, Wiluna, Yalgoo

Recommended travel period: August – September

Source: Murchison GeoRegion, WA Parks Foundation

WA'S WILDFLOWER COUNTRY

Western Australia's Wildflower Country, consisting of eleven local government areas north of Perth, is promoted by Wildflower Country Incorporated. The organisation's goal is to market this picturesque region as a unique and captivating tourism destination, benefiting the entire area. It supports collaborative marketing efforts, enhances visitor experiences, and aids in developing the local tourism industry.

Involved LGAs in the Mid West include City of Greater Geraldton, Shires of Carnamah, Coorow, Mullewa, Morowa, Mingenew, Perenjori and Three Springs

Recommended travel period: August – October

Source: Australian's Coral Coast

ASTROTOURISM WA

Launched in 2018, AstroTourism WA is a campaign aimed at developing and promoting tourism opportunities around stargazing, encouraging both locals and tourists to explore the night skies.

Their initiatives also include organising and supporting events such as stargazing nights, astronomy festivals, and educational workshops, with the purpose of both driving tourism, and also raise awareness about the importance of preserving dark skies.

It is also noted that a Square Kilometre Array telescope, known as SKA-Low, is under construction in the Murchison region, primarily for various scientific purposes.

Involved LGAs in the Mid West include Shires of Coorow, Mingenew, Morawa, Murchison, Perenjori and Three Springs

Recommended travel period: March – October

Source: AstroTourism WA

WEST AUSTRALIAN STATION STAYS

The Station Stays network is a collection of a total of 14 unique accommodation experiences offered on working cattle and sheep stations across WA

Guests can enjoy a range of activities such as guided tours, bushwalking, birdwatching, and learning about the day-to-day operations of the station.

These stays not only provide a memorable experience for visitors but also support the local economy and help sustain the operations of these working stations.

Station Stay Properties in the Mid West include: Murchison House Station Stay in the Shire of Northampton, Wooleen Station Stay in the Shire of Murchison, Melangata Station Stay in the Shire of Yalgoo and Nallan Station Stay in the Shire of Cue.

Recommended travel period: April – October

Source: West Australian Station Stays

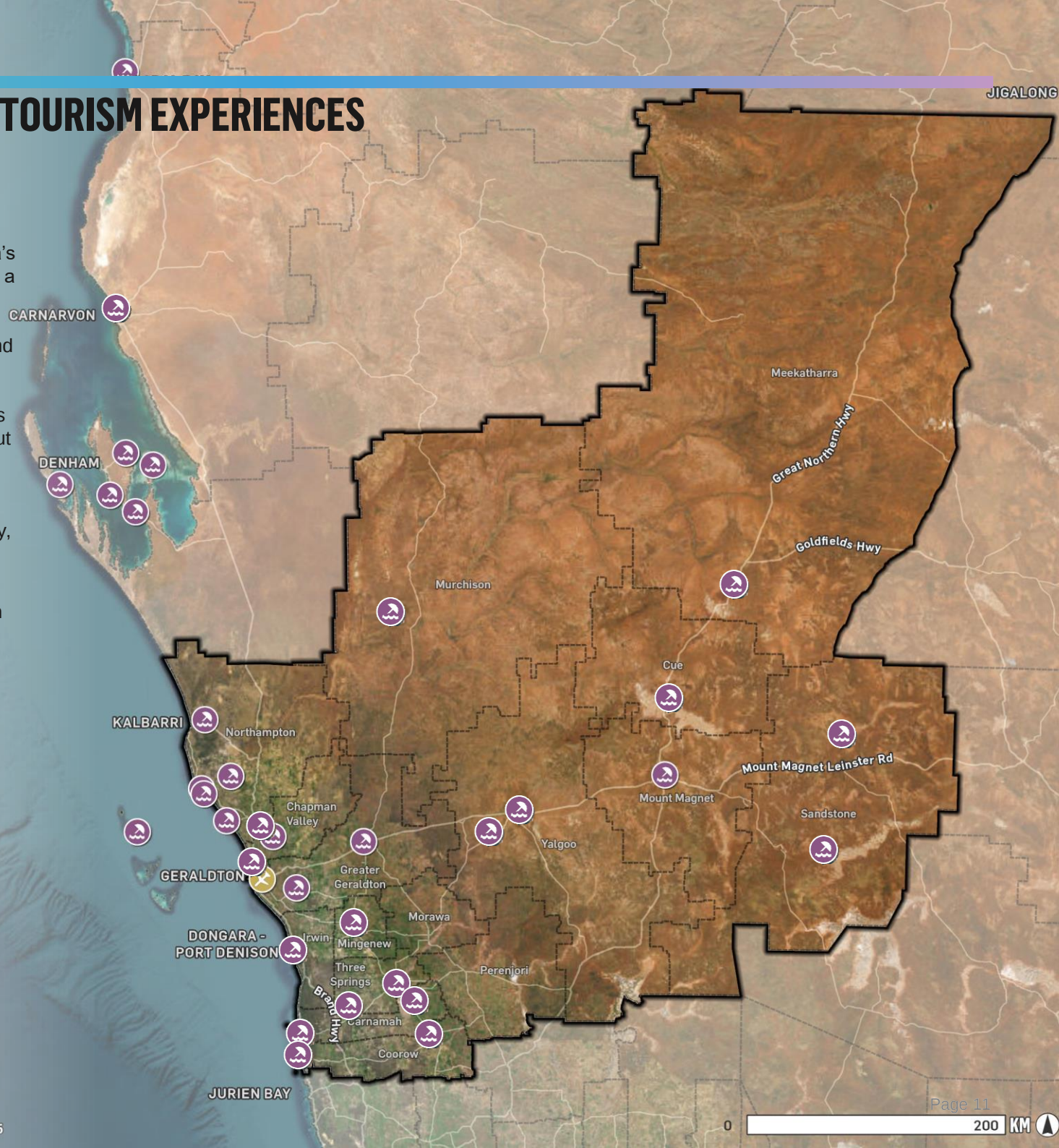
TOURISM SECTOR OVERVIEW | TOURISM EXPERIENCES

Tourism visitation in the Mid West is greatest along the coastline.

The Mid West region, spanning approximately 285,000 sq.km, has two regional tourism organisations: Australia's Coral Coast and Australia's Golden Outback. It features a coastal stretch of about 340 km. Tourism attractions are primarily concentrated along the coast, including destinations like Kalbarri National Park, Hutt Lagoon, and the Abrolhos Island. Geraldton and Kalbarri are popular stopovers for travellers heading north from Perth to destinations like Exmouth. The central and eastern parts of the region have fewer recognised tourism products but growing markets. Visitation in these areas is predominated by the self-drive market, supported by campaigns like Drive the Dream, the Coral Coast Highway, the Murchison GeoRegion, Wildflower Country, Astrotourism Towns, and Stations Stays.

Geographical constraints make it easier to access certain tourism destinations outside the region than those further east in the Mid West.

Notable tourism destinations outside Mid West include Dirk Hartog Island, Eagle Bluff, Monkey Mia, and Shell Beach in Shark Bay. These destinations are about a 4-hour drive from Geraldton Airport (closer to the airport than some other towns in the Mid West such as Meekatharra and Sandstone) and are easily accessible via the North West Coastal Highway, which connects Perth to Northern WA. This underscores Mid West's current role as a stopover destination en route to other attractions.

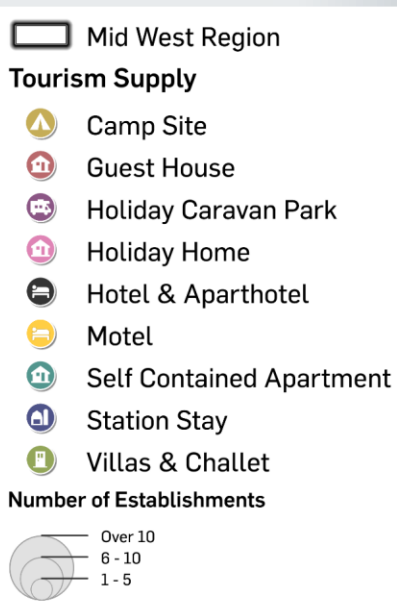


TOURISM SECTOR OVERVIEW | SHORT STAY VISITOR ACCOMMODATION LOCATIONS

Like tourism destinations, short-stay accommodations are primarily concentrated along the coast, with significantly greater diversification compared to those in the central and eastern areas.

The Mid West region has approximately 100 commercial short-stay accommodations (excluding guest houses and B&Bs). Holiday parks and caravan parks dominate the short-stay supply, followed closely by motels (budget hotels).

Similar to the distribution of key tourism attractions, short-stay accommodations are concentrated along the coastal region, particularly from Kalbarri to Dongara – Port Denison. This area also features a diverse mix of accommodation types. In contrast, the central to eastern parts of the region have limited and less diverse short-stay options.



TOURISM SECTOR OVERVIEW | LOCATION AND ATTRACTION ANALYSIS

Attraction and Connectivity Assessment, Mid West Region

	KEY ATTRACTIONS	CONNECTIVITY (FROM PERTH)	CONNECTIVITY (WITHIN THE SUBREGION)
GREATER GERALDTON	- Abrolhos Islands; - Wildflower country, Mullewa; - Greenough; - HMAS Sydney II Memorial; - Museum of Geraldton	- By land (via Brand Highway), 4 hr 25 min; - By air (via flights to Geraldton Airport), 1 hr	The drive from West End to Mullewa takes approximately 1 hr 10 min. From Mullewa, it's an additional 40-min drive to reach the eastern end of the Greater Geraldton LGA.
SHIRE OF NORTHAMPTON	- Kalbarri Skywalk; - Kalbarri National Park; - Blue Holes Beach; - Jacques Point ; - Murchison River; - Pink Lake / Hutt Lagoon	- By land (via Indian Ocean Drive), 6 hr 10 min; - By air (via flights to Geraldton Airport) 1 hr, and an additional 45 min drive to reach Northampton / 2 hr to reach Kalbarri	The drive from Northampton to Hutt Lagoon (Pink Lake) takes about 30-min. From Hutt Lagoon, it's another 45-min to Kalbarri, drawing visitors through Kalbarri National Park attractions to the south of town. From the Kalbarri townsite, a further 30-min drive northeast gives visitors the choice of other National Park attractions such as Z Bend, Nature's Window and the Kalbarri Skywalk.
REST OF MID WEST	- Dongara - Port Denison; - Mingenew (incl. Coalseam Conservation Park); - Green Head / Leeman - Murchison GeoRegion Towns - Wildflower Country, North Midlands Station Stays - Astrotourism Towns	- Dongara - Port Denison: By land (via Indian Ocean Drive), 3 hr 40 min; - Paynes Find (southernmost site part of the Murchison GeoRegion network), 4 hr 30 min - Enneabba (part of WA's Wildflower Country), 3 hr - Coorow (part of WA's Wildflower Country & Astrotourism WA), 3 hr - Melangata Station Stay (part of the Station Stay network), 6 hr 30 min	The drive from Dongara - Port Denison to other towns in the Mid West can take up to 10 hours due to the region's large geographical area. Several tourism campaigns recommend a stay of a few days, such as the suggested 7-day visit for Wildflower Country WA.

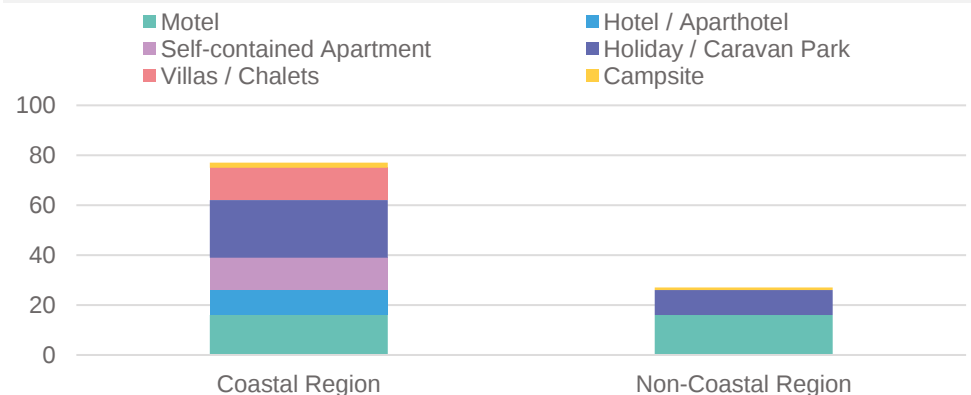
Source: Various, Urbis

Connectivity and the location of key tourism attractions influence the distribution of short-stay accommodations in the Mid West

The table above summarises the key attractions and connectivity of sub-regions within the Mid West, including those outside it. Greater Geraldton stands out as the most accessible area, thanks to its airport with frequent flights to Perth, Broome, and Albany. However, there are significant opportunities to capitalise on inland attractions, as evidenced by key tourism campaigns like Murchison GeoRegion, Wildflower Country, and AstroTourism WA.

As previously mentioned, the number of attractions, and therefore visitors, correlates with the distribution of short-stay accommodations across the region. Despite the large geographical coverage of Mid West, 74% of the total commercial short-stay properties are located along the coastal region.

Number of Short Stay Properties Based on Type, Mid West Region



Source: Various, Urbis

Mid West's coastal region includes the LGAs of: Shire of Northampton, Shire of Chapman Valley, City of Greater Geraldton, Shire of Irwin, Shire of Carnamah, Shire of Coorow

TOURISM SECTOR OVERVIEW | LOCATION AND ATTRACTION ANALYSIS (CONT.)

To better understand Mid West's positioning as a tourism destination in WA, it is essential to highlight its unique offerings and assess them to neighboring regions as the variety and quality of attractions in a region can significantly influence the demographic profile and the length of stay for visitors, thereby impacting the short stay market.

Mid West offers a diverse range of tourism activities, spanning from hiking, fishing, surfing and whale watching. The region is also known for its wildflowers, driving a notable increase of visitation over in spring seasons.

Additionally, several towns in the Mid West, including Geraldton and Kalbarri, are strategically located along the route for travellers driving from Perth to popular northern tourism destinations such as Exmouth and Coral Bay. These destinations, renowned for their snorkelling and diving opportunities, tend to attract visitors for extended stays. Although Geraldton and Kalbarri are often considered stopovers, there is significant potential to enhance the visitor experience in these towns, encouraging longer stays and potentially increasing local spending.

KEY ATTRACTIONS LOCATED IN THE MID WEST



CORAL COAST HIGHWAY

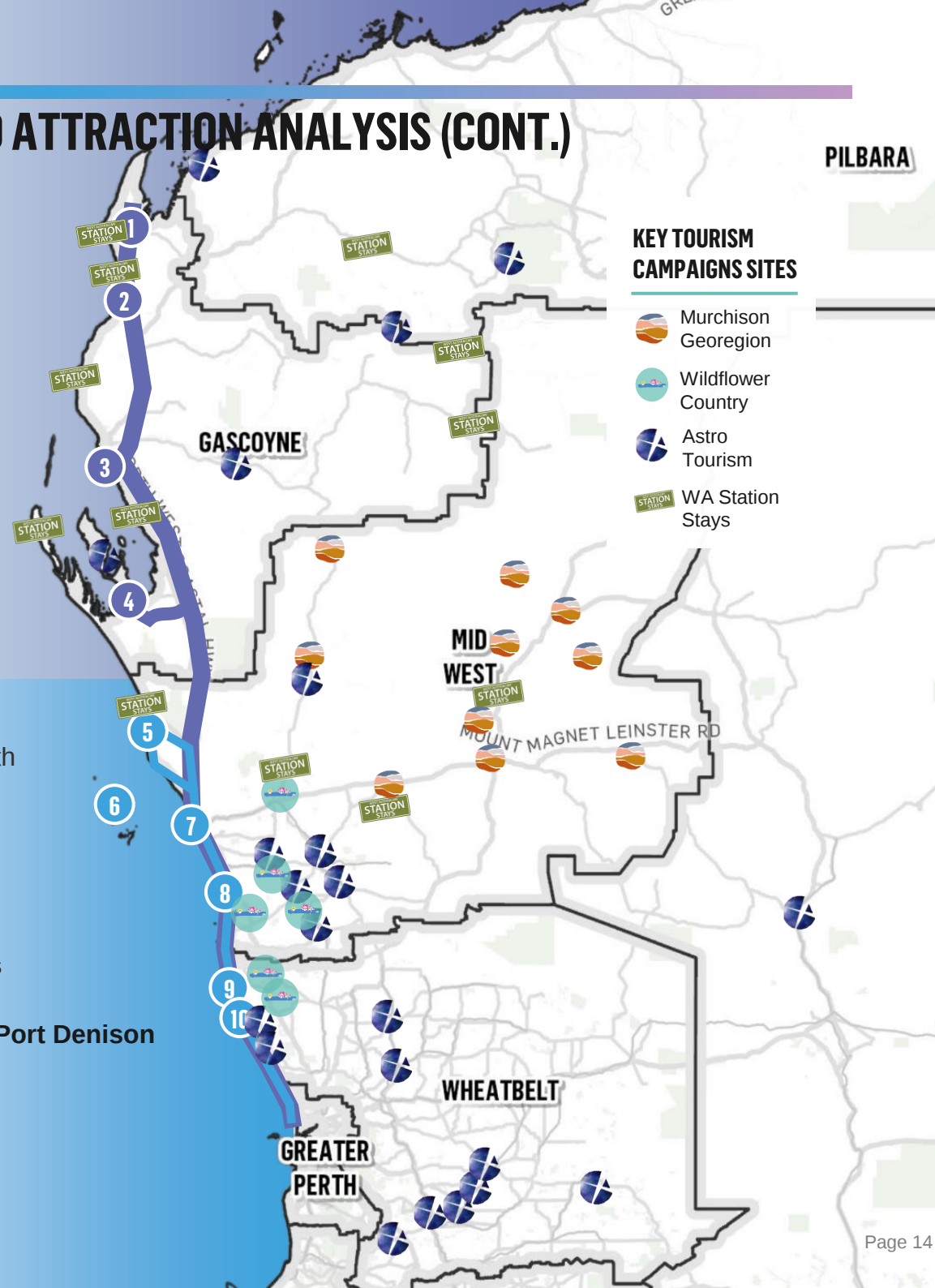
One of Australia's Great Scenic Drives*, connecting Perth and Exmouth | 1,250 km

- 1 Exmouth and Surrounds
- 2 Coral Bay
- 3 Carnarvon
- 4 Shark Bay

INDIAN OCEAN DRIVE

Coastal highway connecting Perth and Geraldton | 268 km

- 5 Kalbarri and Surrounds
- 6 Albrohlos Islands
- 7 Geraldton and Surrounds
- 8 Greenough & Dongara – Port Denison
- 9 Jurien Bay
- 10 Cervantes



TOURISM SECTOR OVERVIEW | LOCATION & ATTRACTION ANALYSIS (CONT.)

TOP 3 TRIP ACTIVITIES ACROSS REGIONS, BASED ON DOMESTIC VISITOR NIGHTS, YEAR END 2023

	MID WEST	GREATER GERALDTON	SHIRE OF NORTHAMPTON	GOLDEN OUTBACK	CORAL COAST
#1	 Eat out / dine at a restaurant and / or café (48%)	 Eat out / dine at a restaurant and / or café (47%)	 Eat out / dine at a restaurant and / or café (41%)	 Eat out / dine at a restaurant and / or café (43%)	 Eat out / dine at a restaurant and / or café (38%)
#2	 Go to the beach (24%)	 Go to the beach (30%)	 Go to the beach (31%)	 Pubs, clubs, discos, etc (33%)	 Go to the beach (38%)
#3	 Pubs, clubs, discos etc (28%)	 Visit Friends & Relatives (23%)	 Visit National Parks / State Parks (28%)	 Sightseeing / looking around (24%)	 Pubs, clubs, discos etc (24%)

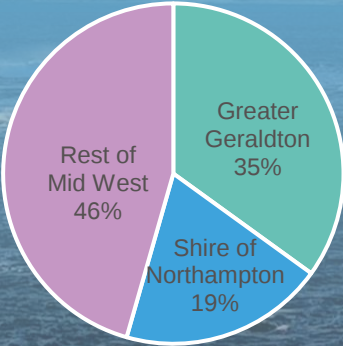
Source: Tourism Research Australia
Percentage proportions are based on visitor nights relative to the total visitor nights for the top three activities. Some data, particularly for the Shire of Northampton and the Mid West, are based on small sample sizes and should be used with caution.

While the top trip activities in Mid West are relatively generic, the Shire of Northampton uniquely emphasises "Visiting National Parks" as a key activity. This highlights its distinct tourism offering and potential for future alignment with short-stay accommodations.

The LGAs of Greater Geraldton and the Shire of Northampton align closely with the broader Mid West region, with "eating out" and "going to the beach" being the top two visitor activities. The Shire of Northampton also highlights "visiting national parks," showcasing its unique appeal and the potential to improve short-stay options with better connectivity to this attraction. In contrast, Greater Geraldton and the Mid West list more general third activities, such as "pubs, clubs, discos" and "visiting friends and relatives," despite the tourism attractions outlined in the previous slide.

In terms of proportion to total visitor domestic nights however, the Shire of Northampton contributes less to total visitor nights compared to Greater Geraldton and the rest of the Mid West, averaging 422,000 visitor nights over the past five years.

PROPORTION OF TOTAL DOMESTIC VISITOR NIGHTS BASED ON LGAS, 5 YEAR AVERAGE



Source: Tourism Research Australia, Urbis
Note: 5 Yr. Average comprises 2016 to 2019 (inclusive) and 2023 to exclude the impact of Covid-19 pandemic (2020 – 2022)

TOURISM SECTOR OVERVIEW | AVIATION CONNECTIONS AND CAPACITY

The introduction of new routes between Perth and Geraldton is anticipated to positively impact the Mid West region

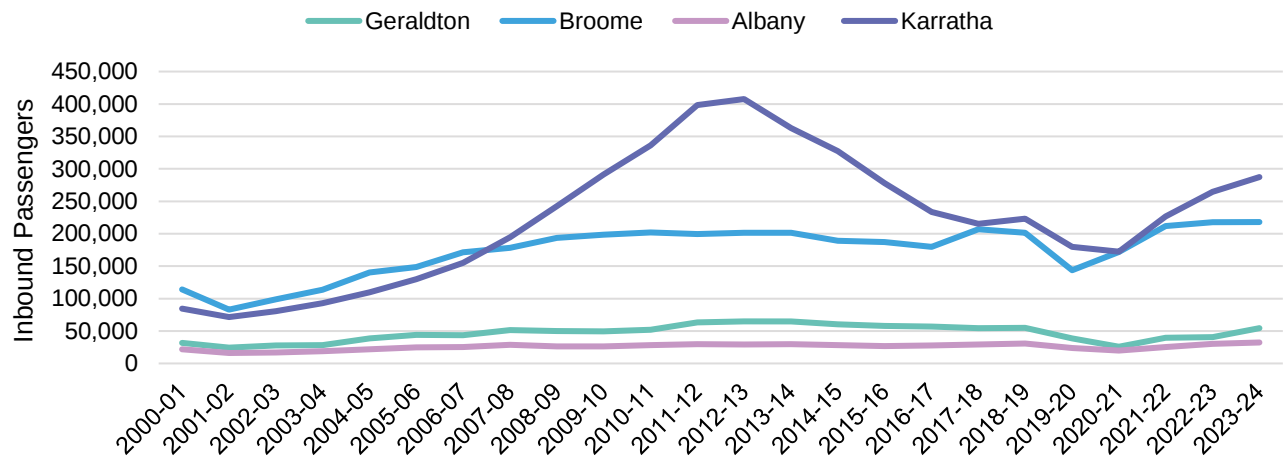
There are a total of 5 airports in the Mid West region, with Geraldton Airport being the largest, and four smaller ones of Kalbarri Airport, Mount Magnet Airport, Cue Airport and Meekatharra Airport. Geraldton Airport (GET) is located approximately 10 km east of the Geraldton city centre in the suburb of Moonyoonooka, Western Australia (13 minutes drive).

Over the past 23 years, annual FY inbound passengers to Geraldton has grown at an average 2.39% per annum, with the most recent data recorded at 2023-24 was at 54,241 passengers. Just recently in mid-2023, new routes were introduced by Nexus Airlines, operated by Aviair, including services from Perth to Geraldton. Additionally, the newly expanded IRFN (Inter Regional Flight Network) route was introduced, which now operates between Geraldton, Karratha, Port Hedland, and Broome, with return services.

Growing aviation connections and capacity is also a key initiative outlined in the Mid West Regional Tourism Development Strategy, with key points to highlight the importance of Geraldton airport for regional and interregional connections and investigate the feasibility of other interregional connections.

The airport also service charter flights, including those connecting Grealhton and Albrohlos Islands, as well as Pink Lake, Shark Bay Heritage Area, Monkey Mia and Mullewa.

Passengers to Geraldton Airport vs Other Regional Airports, FY 20/21 – 23/24



Source: Bureau of Infrastructure and Transport Research Economics Australia

Aviation Connections to Geraldton Airport

DEPARTING FROM	FREQUENCY	CARRIER	CAPACITY PER AIRCRAFT
Perth	Daily (~30x / week)	QantasLink, Nexus Airlines, Virgin Australia*	80 – 150
Broome	3x / week	Nexus Airline	~80
Albany	1x / week	Virgin Australia	~100
Karratha	3x / week	Nexus Airline	~80
Port Hedland	3x / week	Nexus Airline	~80

Note: Virgin Australia only operates FIFO services are not publicly open for tourists

Source: City of Greater Geraldton, Geraldton Airport

TOURISM SECTOR OVERVIEW | REGION CONNECTIVITY

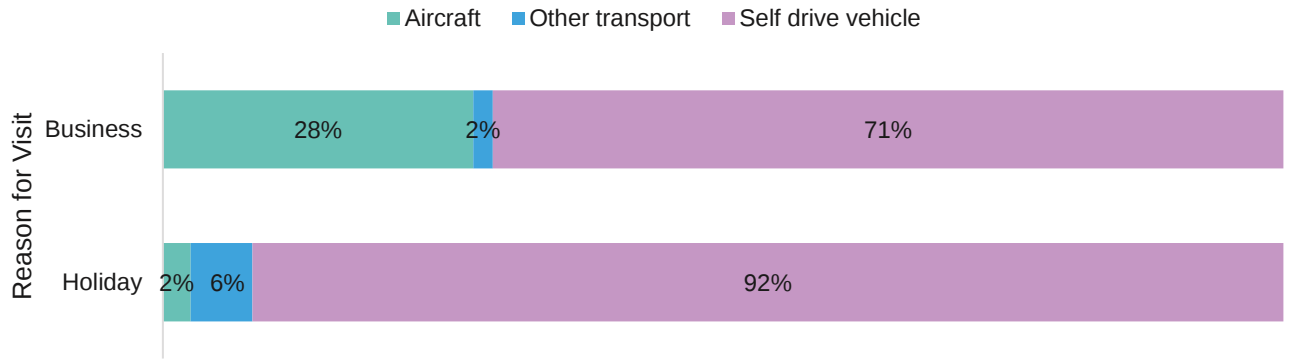
Business visitors are more likely to fly to Geraldton than holiday visitors

Over a 10-year average, about 28% of overnight business visitors to Greater Geraldton arrived by air, although the self-drive market remains dominant, accounting for 69% of total visitation.

Historical data for business visitors shows notable fluctuations in the method of transport. While the proportion of visitors driving to the region has generally been higher than those flying, this trend shifted in 2017 when a larger proportion of visitors flew in, driven by FIFO workers during the mining boom. However, the number of visitors driving in picked up notably in 2018 and continued through to the early COVID-19 period in 2020 when travel restrictions were in place.

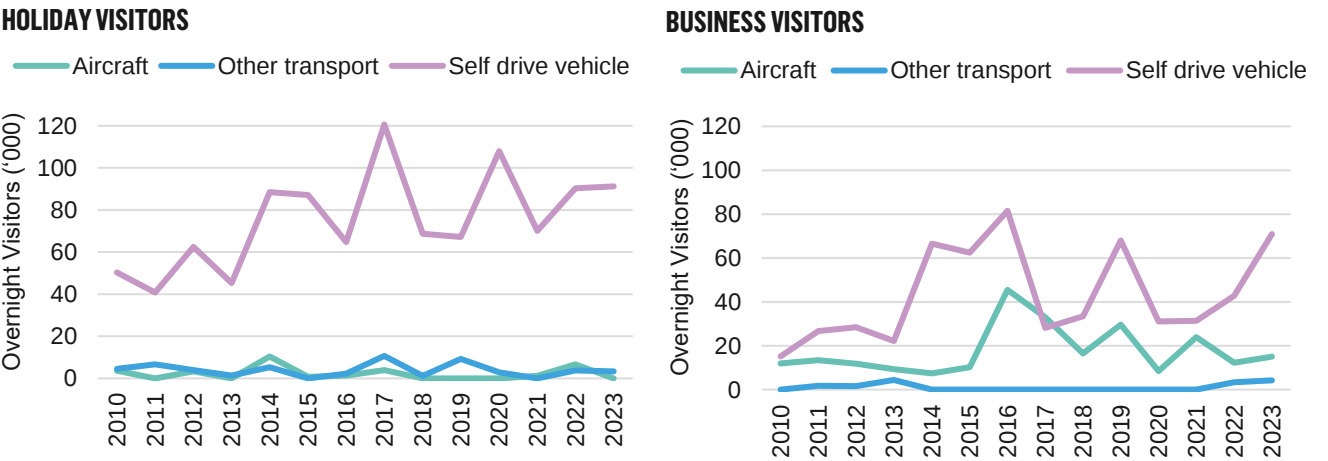
For holiday visitors, the self-drive market has remained more consistent over the years, followed by 'other transport' options. Visitors flying into the region make up a significantly smaller proportion, at just 2%. Supported by targeted tourism campaigns such as Drive the Dream, the Coral Coast Highway, Murchison GeoRegion, Wildflower Country, Astrotourism Towns, and Station Stays (outlined on page 10), there is an opportunity to further leverage on the region's prominent self-drive market.

Method of Transport to Greater Geraldton, Overnight Domestic Visitors, 10 Years Average



Note: 10 Yr. Average comprises 2011 to 2019 (inclusive) and 2023 to exclude the impact of Covid-19 pandemic (2020 – 2022)
Source: Tourism Research Australia

Method of Transport to Greater Geraldton, Domestic Overnight Holiday vs Business Visitors, 2010 – 2023



Other transport includes 'long distance transport'; such as the combination of air and long road and combination of sea and long road, 'other land transport' such as railway, bus/coach and "water transport" such as passenger lines and ferries, cruise, private vessel)
Source: Tourism Research Australia

TOURISM SECTOR OVERVIEW | INDUSTRY OVERVIEW

The tourism sector in the Mid West contributes to the region's economic activity and represents 6% of local jobs.

Contributing \$160 million to state economy and comprising 6.1% of the region's 26,361 jobs, the Mid West's tourism sector is a major player in the region's economic activity.

Much of the Mid West's tourism workforce is in the accommodation and food and beverage services industries, with some also providing land and marine tours operating in the transport industry. Housekeepers, receptionists and cleaners are top occupations in the accommodation industry with 169 workers, with accommodation managers numbering 92 workers. As the largest city north of Perth and a key regional gateway to WA's northern destinations, Greater Geraldton employs over 60% of the region's tourism workforce. Only 27% of the Mid West's tourism jobs are outside of Greater Geraldton and Kalbarri, the region's two largest tourism centres.

Tourism Economy Overview, Mid West Region



Source: REMPLAN, ABS 2021 Census Place of Work Employment (Scaled), ABS 2021 / 2022 National Input Output Tables, ABS June 2023 Gross State Product, and ABS 2022 / 2023 Tourism Satellite Account.

Top 10 Occupations in Tourism-Aligned Industries, Mid West Region

 ACCOMMODATION	NO. WORKERS	 FOOD & BEVERAGE SERVICES	NO. WORKERS
Housekeepers	88	Kitchenhands	231
Receptionists	41	Sales Assistants (General)	156
Commercial Cleaners	40	Bar Attendants and Baristas	129
Caravan Park & Camping Ground Managers	36	Cafe Workers	106
Hotel and Motel Managers	28	Chefs	105
Bar Attendants & Baristas	25	Waiters	105
Real Estate Sales Agents	25	Fast Food Cooks	78
Chefs	22	Cafe and Restaurant Managers	77
Other Accommodation & Hospitality Managers	19	Cooks	53
Kitchenhands	15	Retail Managers	49

Source: ABS 2021 Census Place of Work
Note: Comprises all workers in the Mid West SA3 geography as defined by the ABS

TOURISM SECTOR OVERVIEW | MAJOR PROJECTS

Major projects across the Mid West are expected to play an important role in shaping the demand for both workers accommodation as well as short-stay accommodation in the region. Larger (\$100m+) projects are likely to require construction teams from outside the region, with resource projects often increasing the volume and frequency of workforce business travel. Specifically, a significant number of new projects are forecasted to commence in 2026, which is expected to further increase accommodation demand.

This is expected to have a dual-impact on the provision of short-stay in the region. Whilst business travel would see a boost in demand from these projects proceeding, this would likely see many existing establishments being utilised at a greater

level for project workforces. In the medium-to-long term, greater levels of investment in designated worker accommodation would likely have a crowding-out effect on future tourism-focused accommodation construction.

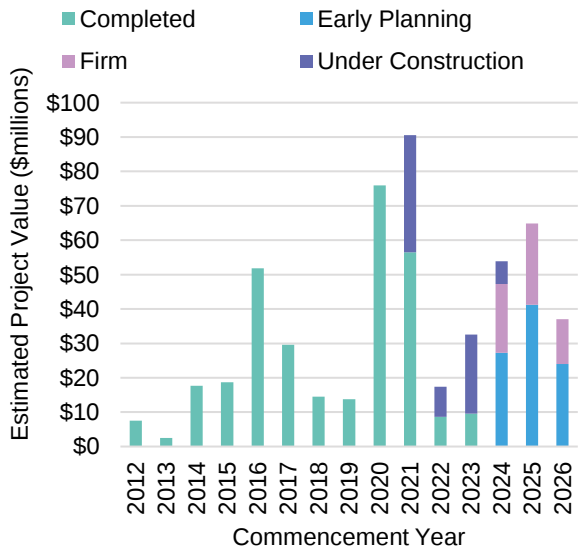
Broadly the planned investment in the region is centred around:

- **Renewable Energy** – plans for major projects to establish the Mid West as a leading renewable energy hub
- **Infrastructure and Industrial** – railway line and Geraldton port upgrades to meet increasing demand
- **Health** – to service the region’s growing population

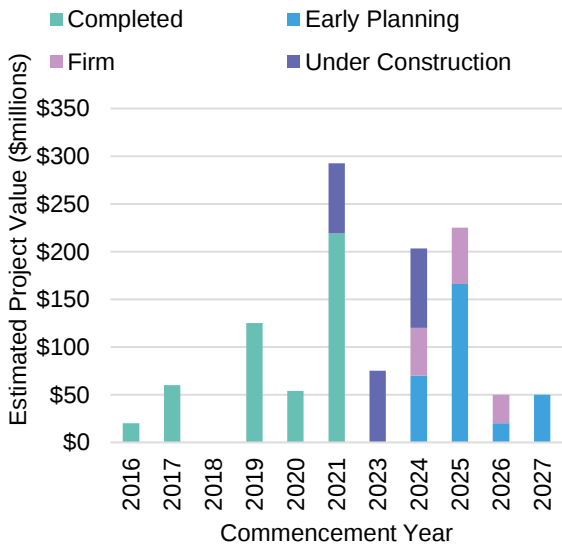
While making up a more minor proportion in terms of value, tourism projects are still noted for the region, with an estimated \$195 million earmarked for future tourism development. This includes potential projects such as a caravan park in Geraldton, development of visitor infrastructure in the Albrohlos Islands and a foreshore revitalisation in Kalbarri.

Recent projects in the region include the \$24 million Kalbarri National Park Enhanced Infrastructure project, featuring the Kalbarri Skywalk, which opened in 2020.

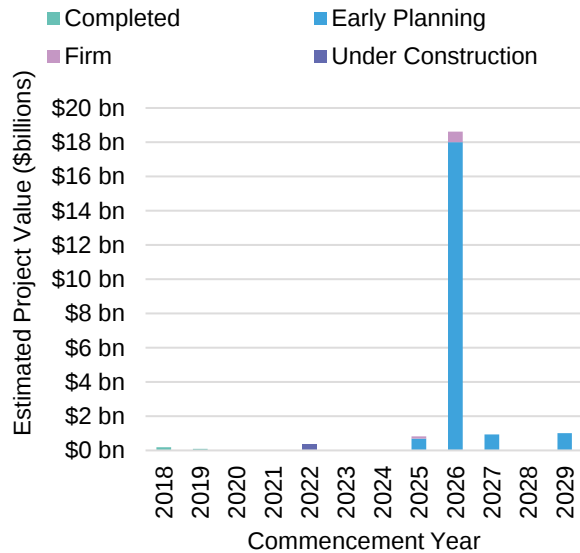
Small Projects (under \$20million) Pipeline, Mid West



Medium Projects (\$20million-\$99million) Pipeline, Mid West



Large Projects (over \$100million) Pipeline, Mid West



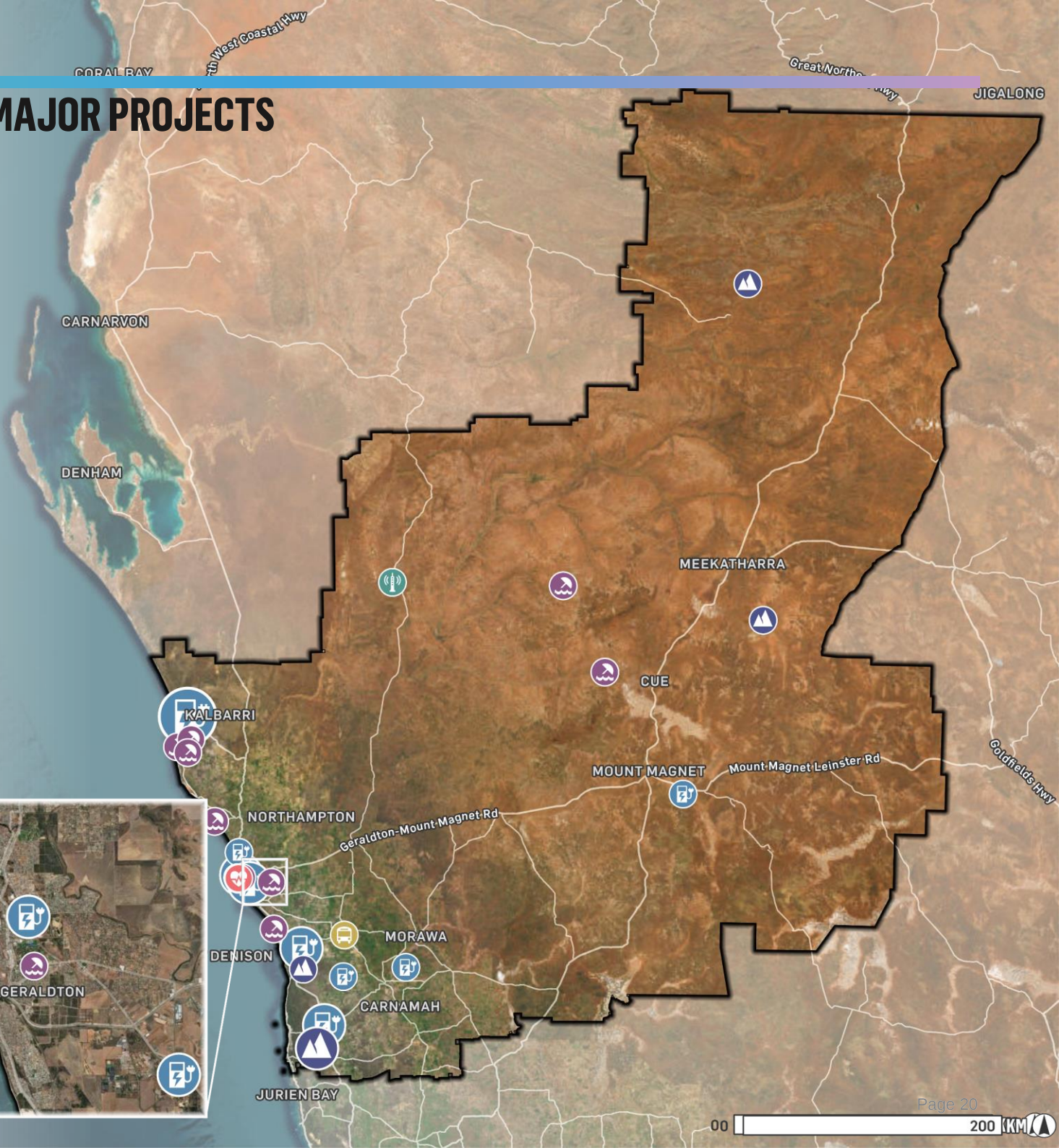
Source: Cordell, DPLH, MWDC, Urbis, WA State Budget 2024-25

TOURISM SECTOR OVERVIEW | MAJOR PROJECTS

Tourism projects are generally planned for the coast-line, whilst most planned energy projects also within two hours of the coast.

As listed on the following slide, energy and resource/mining projects dominate the prospective project pipeline in the Mid West region. Notable projects include the Eneabba Rare Earths Processing Plant, Murchison Hydrogen Renewables Project and the Australian Vanadium Project.

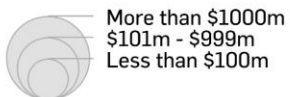
Future tourism projects, whilst generally on a much smaller scale to their energy and mining counterparts, are primarily planned along the Coral Coast region of the Mid West, highlighting that without significant intervention, tourism activity is likely to remain concentrated in this area. Plans for investment the central or eastern parts of the region that is not in the energy, minerals/resources sectors is limited.



Project Category

-  Health
-  Tourism
-  Minerals
-  Transport
-  Telcom & Space
-  Energy

Estimated Project Value



TOURISM SECTOR OVERVIEW | MAJOR PROJECT PIPELINE

Mid West Major Project Pipeline, 2024-25 onwards

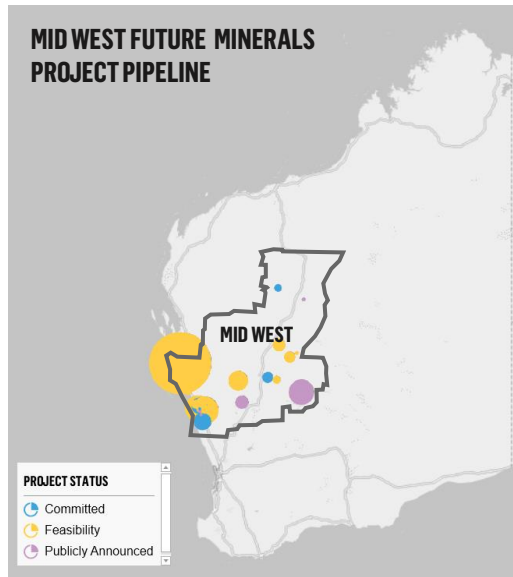
PROJECT NAME	PROJECT NAME	ESTIMATED PROJECT VALUE	INDUSTRY	ESTIMATED YEAR OF COMPLETION	LOCATION	STAGE
MAJOR PROJECTS	Murchison Hydrogen Renewables Project	\$15,000m	Energy	2028	Kalbarri	Early Planning
	Mid West Green Hydrogen / Ammonia	\$3,000m	Energy	2029	Geraldton	Early Planning
	Mid West Green Iron	\$3,000m	Energy	2029	-	Early Planning
	Geraldton Export-Scale Renewable Investment	\$1,000m	Energy	2033	Geraldton	Early Planning
	Vestas - Mid West Wind Farm	\$1,000m	Energy	2030	North Midlands	Feasibility
	Twin Hills Wind Farm	\$930m	Energy	2030	Eneabba	Early Planning
	Solar Energy Farm	\$440m	Energy	-	Womarden	Approved
	SKA-Low Radio Telescope	\$387m	Telcom & Space	2027	Murchison	Under Construction
	Geraldton Port Maximisation Project	\$350m	Transport	2035	Geraldton	Early Planning
	Mid West Rail Upgrades (Carnamah to Mingenew)	\$267m	Transport	2027	Mingenew	Early Planning
	Geraldton Health Campus Redevelopment	\$123m	Health	2027	Geraldton	Firm
	Mid West Hydrogen Hub	TBD	Energy	2029	Oakajee	Early Planning
FIRM MINING-SECTOR PROJECTS	Eneabba Rare Earths Processing Plant	\$1,600m	Minerals	2025	Eneabba	Firm
	Waitsia (Stage 2)	\$1,075m	Energy	-	Milo	Firm
	Min Res Lockyer Deep Project	\$800m	Energy	-	-	Potential
	Australian Vanadium Ltd	\$604m	Minerals	2025	Meekatharra	Firm
	Northern Goldfields Interconnect	\$460m	Energy	-	Ambania - Goldfields Pipeline	Firm
	Abra Lead-Silver Project	\$231m	Minerals	-	Peak Hill	Firm
	Beharra Springs	\$39m	Minerals	-	Arrowsmith	Firm
FUTURE TOURISM PROJECTS	Abrolhos Seascape and Hot Springs Eco Resort	\$70m	Tourism	2027	Bookara	Early Planning
	Moresby Ranges Conservation Park	\$22m	Tourism	-	Chapman Valley	Early Planning
	Murchison Vast Sky (accommodation)	\$16m	Tourism	-	Murchison	Early Planning
	West End Precinct (Stage 1)	\$16.1m	Tourism & Mixed Use	2027	Geraldton	Development Approval
	West End Precinct (Stage 2)	\$70m	Tourism & Mixed Use	-	Geraldton	Early Planning
	Visitor Infrastructure at the Abrolhos Islands	\$8m	Tourism	-	Abrolhos Islands	Funded
	Kalbarri Foreshore Revitalisation Phase 1	\$8m	Tourism	2026	Kalbarri	Funded
	Pink Lake Cultural Tourism	\$7m	Tourism	2027	Northampton	Funded
	Plan for our Parks (incl. Walga Rock)	\$24m	Tourism	2026	Cue	Funded
	Lucky Bay Cultural Tourism	\$5m	Tourism	-	Northampton	Funded
	Horrocks Beach Caravan Park	\$4m	Tourism	-	Horrocks	Development Approval

Source: Cordell, DPLH, MWDC, Urbis, WA State Budget 2024-25

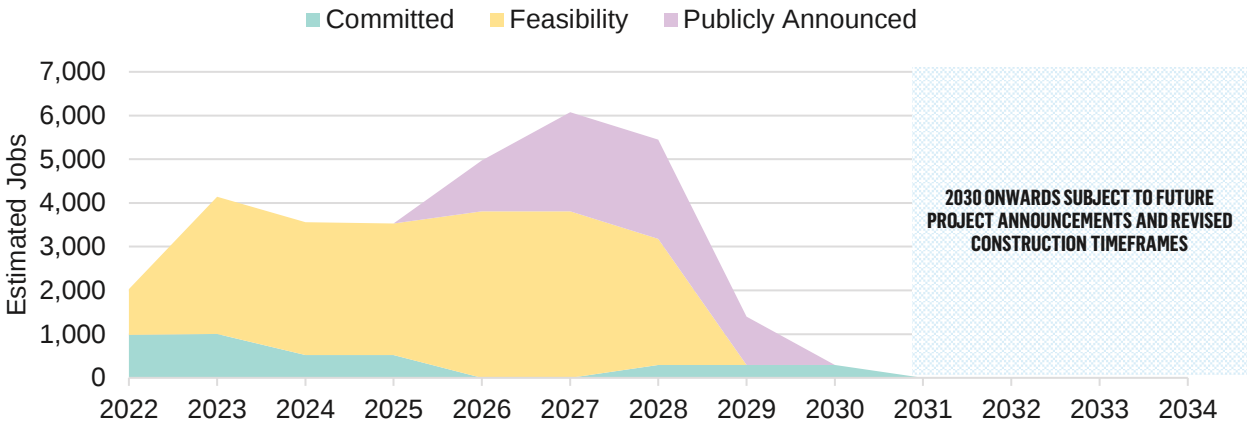
TOURISM SECTOR OVERVIEW | MINERALS INVESTMENT PIPELINE

Future projects in the region could create a total 9,000 jobs, potentially increasing demand for both worker and short stay accommodation.

The minerals sector plays a highly significant role in the Mid West economy, and a small number of committed projects and a much larger number of tentative future projects are expected to require up to 6,100 construction and 4,850 operational workers in their peak impact years. The additional workforce in the Mid West will not only require significant investment in workers accommodation, but will also put upwards pressure on demand for short-stay, as project teams increase work and business trips to the region. Projected construction-phase and operational workforces are highly variable, with the largest projects (particularly the \$10-15bn Murchison Hydrogen Renewables Project) tied to future investment decisions, and hence needs to be frequently revisited.

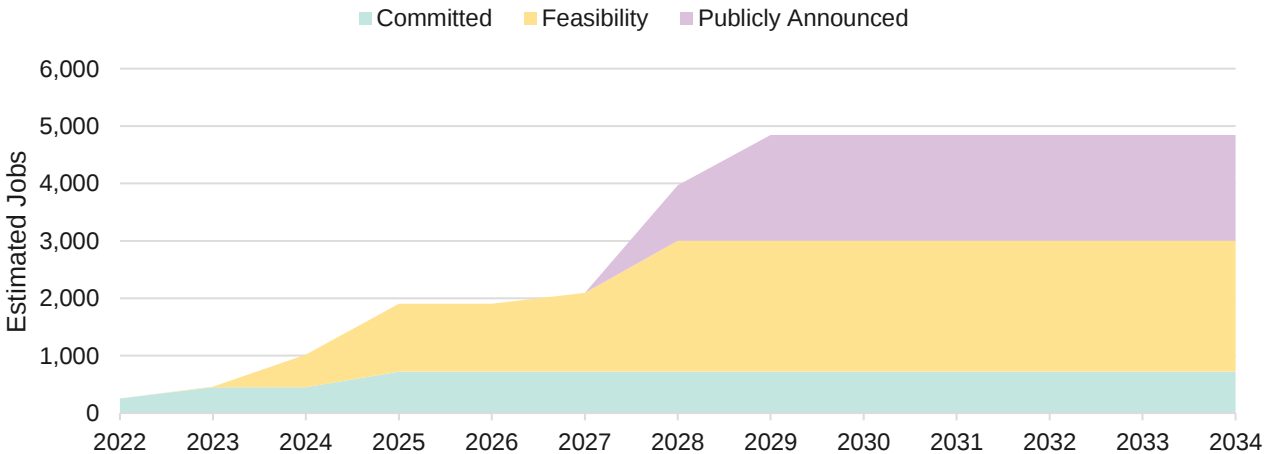


Mid West Major Resource/Mineral Project Construction-phase Worker Projection¹



Source: Urbis, Office of the Chief Economist, REMPLAN, Mid West Development Commission, business.gov.au

Mid West Major Resource/Mineral Project Operational-phase Worker Projection¹



Source: Urbis, Office of the Chief Economist, REMPLAN, Mid West Development Commission, business.gov.au
¹Note: These are high-level projects for indicative purposes only. Numbers are subject to be revised closer to project commencement. Only projects with an expected investment values of at least \$100m were considered 'Major Projects'. Timeframes are estimates only and subject to revision.

TOURISM SECTOR OVERVIEW | VISITOR NIGHT GROWTH SCENARIOS

To understand the potential growth outlook for the Mid West Region, we have modelled a series of potential visitor night scenarios through to 2044.

Base and elevated forecast scenarios see the Mid West Region return its share of domestic visitor nights in WA from 4.3% in 2023 to 5.8% by 2030 and its international nights from 1.3% to 1.45% of WA levels by 2027, both in-line with historic levels.

The modelling illustrates:

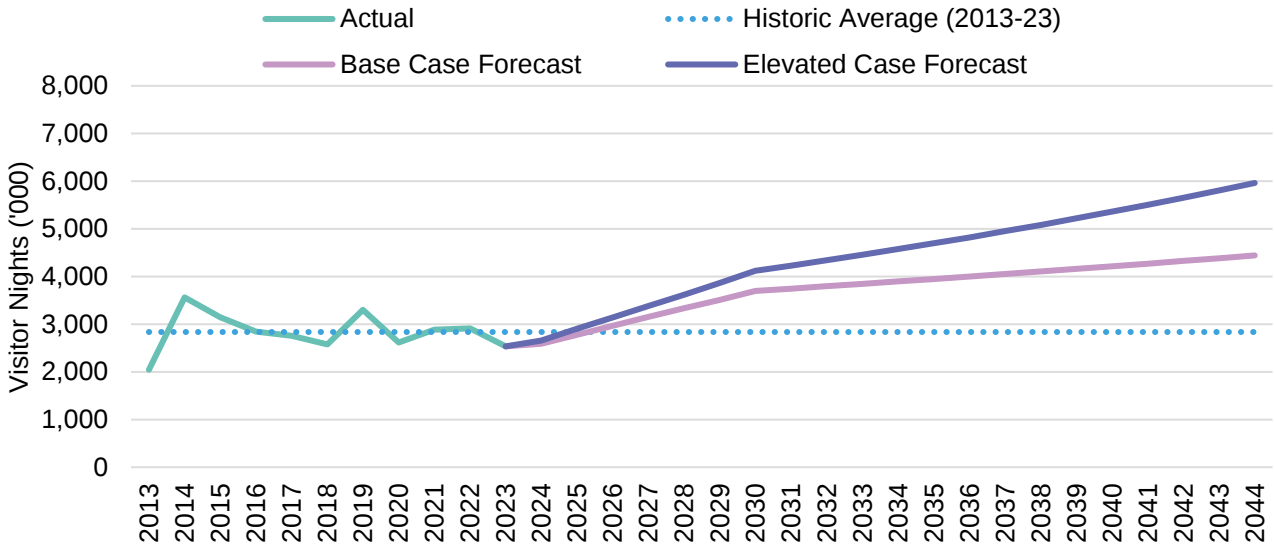
Actual growth: Recorded visitor nights between 2013-2023, grew by 490,000 or 24%, although with cycles of upswings and downturns.

Historic average: A constrained scenario in which the Mid West cannot fulfill capacity expansions, investment pipelines don't materialise and national and global economic growth is heavily curtailed, with visitor nights stagnating at historical levels of 2.8m per year.

Base case forecast: Assumes that future visitor growth in WA will be 50% slower than what is forecast by TRA (Tourism Research Australia) as a conservative contingency that increases scenario likelihood. In this case Mid West visitor nights will grow by an average of **91,000 each year** over the next 20 years and will be 75% (or 1.9m nights) higher than 2023 levels in 2044.

Elevated case forecast: Assumes that WA will achieve ambitious TRA growth forecasts that will continue at the medium-term growth forecast in the long-run. In this case visitor nights in the Mid West will grow by an average of **163,000 each year** over the next 20 years and will more than double in volume, growing 135% to nearly 6 million nights in 2044. This scenario relies on a strong national economy, strong global economic growth, positive resource and major project investment decisions and a dynamic construction market that is able to expand supply alongside pent-up demand.

Historic and Forecast Visitor Nights in Mid West Region, 2013 - 2044



Source: Urbis, Tourism Research Australia

METHODOLOGY

Elevated Case Forecast

- Growth meets the TRA-derived visitor night growth forecast with the Mid West converging at its historic share of total WA's visitor nights in the medium and long term.
- Domestic visitor nights are forecast to grow at the TRA-forecasted rate from 2023-28 and stabilise at the rate of the final year.
- International visitor nights for WA are projected to meet TRA's national visitor arrivals forecast and stabilise at the final year, one year earlier than the national rate, due to the state's expedited post-covid recovery
- Scenario may be adopted should tentative minerals-sector projects proceed at a higher level.

Base Case Forecast

- Assumes growth will be 50% of the levels at the elevated growth scenario.
- This visitor growth scenario is used in the Base Room Demand forecasts that follow.

TOURISM SECTOR OVERVIEW | MODELLING SHORT STAY ACCOMMODATION DEMAND

Two scenarios were developed to test the levels of growth required in the number of hotel, resort and motel rooms if base and elevated visitation growth are to materialise. This allowed a range of variables to be considered, such as propensity to choose accommodation typologies, occupancy levels and expected guests per booked room with sensitivity testing at various levels of demand growth.

The base room demand scenario assumes that base-case visitor night growth be achieved, whereas the elevated-case demand scenario assumes the elevated level of visitor night growth will materialise.

The elevated scenario presumes that the ambitious TRA forecasts will be achieved and maintained over the long term. Conversely, the lower-growth base case is deemed more probable, as it encounters fewer constraints and presents a more feasible pathway for attaining this level of visitors and guests.

Demand Modelling Assumptions		
PARAMETER	NO. (%)	NOTE
Sustainable Occupancy Rate	80%	Review of maintainable STR occupancy rates that hotels can sustainably operate under before inducing new supply requirement.
Average Number Guests per room	1.8	Assumed to fluctuate between 1.5 to 2.1 guests per room, stabilising at 1.8 guests in line with historic ABS STA range.
Visitor Night Hotel, Motel & Resort Propensity	14.25%	Proportion hotel and similar accommodation of domestic visitor nights in the Mid West region of WA.

Source: Urbis, Tourism Research Australia; STR Global; ABS

Sensitivity Testing Scenarios as Proportion of Visitor Nights Growth Forecast	
Base Demand Scenario as % of Growth Forecast	50%
Elevated Demand Scenario as % of Growth Forecast	100%

TOURISM SECTOR OVERVIEW | SHORT STAY ACCOMMODATION POTENTIAL

Visitation growth in the Mid West would induce demand for approximately 500 to 900 rooms over the next two decades.

Over the next 10 years to 2034, demand modelling indicates that an additional 350 to 520 hotel, resort and motel rooms will likely be required to facilitate the growth in visitors to the Mid West. A further 150 to 375 rooms will be required in the following decade from 2034 to 2044.

Based on an average of 1.8 visitors per room, it is estimated that the total catchment room demand (for hotels, resorts and motels) in the Mid West region was approximately 560 to 580 rooms in 2024. To service this level of demand, it should be noted that commercial hotels typically operate at maximum circa 80% occupancy in the medium term, hence there would be 700 to 720 rooms needed to sustainably support the level of demand today.

Another important consideration is that the modelling here only considers demand-side metrics. The forecast levels of accommodation expansion can only be realised should a suitable development environment emerge that facilities viable short-stay development with regard to construction costs, attracting and accommodating a sufficiently-sized tourism and hospitality workforce and other feasibility factors that will be reviewed in later sections of this study. In the scenario that these supply-side bottlenecks persist, there will be significant challenges for the Mid West to the support this level of tourism and visitor growth.

Base Room Demand (Hotels, Resorts & Motels), Mid West, 2024 - 2044

ROOM DEMAND	2024	2029	2034	2039	2044	10-YEAR GROWTH	20-YEAR GROWTH
Domestic Room Demand	478	656	727	772	819	+250	+342
International Room Demand	83	106	117	130	144	+34	+60
Total Mid West Room Demand	561	761	844	902	963	+283	+402
Total Rooms to Support Demand ¹	701	952	1,055	1,127	1,204	+354	+503

Source: Urbis; Tourism Research Australia; ABS

¹Note: Assumes a maximum sustainable occupancy rate of 80% for serviced short-stay properties. The total number of rooms will hence need to be 25% higher than the level of demand to support sustainable operation for the forecast number of guests.

Elevated Room Demand (Hotels, Resorts & Motels), Mid West, 2024 - 2044

ROOM DEMAND	2024	2029	2034	2039	2044	10-YEAR GROWTH	20-YEAR GROWTH
Domestic Room Demand	488	712	838	943	1,061	+350	+573
International Room Demand	88	125	154	188	231	+66	+143
Total Mid West Room Demand	576	838	991	1,131	1,292	+416	+717
Total Rooms to Support Demand ¹	719	1,047	1,239	1,414	1,616	+520	+896

Source: Urbis; Tourism Research Australia; ABS

¹Note: Assumes a maximum sustainable occupancy rate of 80% for serviced short-stay properties. The total number of rooms will hence need to be 25% higher than the level of demand to support sustainable operation for the forecast number of guests.

TOURISM SECTOR OVERVIEW | INITIAL GAP ANALYSIS

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	CHALLENGES
 STATE-WIDE TOURISM MARKET	- WA's tourism sector has rebounded strongly post-Covid-19, with visitor nights peaking at 66% from 2022 to 2023; - WA benefits from a strong intrastate market, which helped stabilised the market during Covid-19.	Despite a strong rebound since Covid-19, WA's total visitor nights remain lower than those of NSW, VIC, and QLD.	- Several strategies and campaigns have been introduced to position WA as a world-class destination, including the WAVES 2023 strategy and the Walking on a Dream campaign. Additionally, there is also the ACC Tourism Destination Management Plan (TDMP) which outlines a 10-year vision to enhance tourism through strategic goals and priorities. - Targeted tourism campaigns such as the Drive the Dream, Coral Coast Highway, Murchison GeoRegion, Wildflower Country, Astrotourism Towns, and Station Stays also offers an opportunity to further leverage on the region's prominent self-drive market.	The continuous shift in the tourism market, coupled with the rise of emerging tourism destinations outside of WA that cater to budget-conscious visitors, presents a challenge. Local visitors may become more inclined to travel overseas rather than interstate.
 ACCESSIBILITY	- There are multiple tourism access routes connecting Perth to the Mid West Region, including via road (Indian Ocean Drive), air (Geraldton Airport) and sea (cruise ship to Geraldton); - Recently, new routes connecting Perth to Geraldton were introduced by Nexus Airlines, increasing flight frequency to ~30 flights/week. In addition, Geraldton is part of the IRFN route which also connects Karratha, Port Hedland, and Broome	- Geographical constraints make it easier to access certain tourism destinations outside the region than those further east in the Mid West; - The rest of the Mid West Region captures only 1.4% of WA's international nights, highlighting a weakness in accessibility for international visitors compared to its 3.8% share of domestic nights.	- Geraldton airport has the capacity to take larger aircrafts. As per the Mid West Regional Tourism Development Strategy, growing aviation connections and capacity is regarded as a key initiative. - Regions along the coast are strategically located along the route for travellers driving from Perth to popular northern tourism destinations such as Exmouth and Coral Bay, offering extended stopover opportunities aimed at encouraging longer stays and potentially increasing local spending.	The availability and readiness of supporting infrastructure, such as water and electricity, are crucial, especially in areas further east of the region, where the challenge and cost of building can be significantly higher.

TOURISM SECTOR OVERVIEW | INITIAL GAP ANALYSIS

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	CHALLENGES
 TOURISM ATTRACTIONS	The Mid West boasts a diverse array of tourism attractions, offering activities such as hiking, fishing, surfing, and whale watching. The region is also renowned for its wildflowers, which significantly boost visitation during the spring season.	Except for the Shire of Northampton, the region's tourism attractions have not yet uniquely translated into the top three recorded trip activities	- There is current engagement with TOs to lead cultural walks in National Parks, bush tucker tours and potentially adding cultural value to existing tours. - A large proportion of visitors, especially of those on holiday are contributed from the self drive market. This presents an opportunity to further rely on local tourism campaigns such as the Murchison Georegion, Wildflower Country, Astrotourism Towns and Station Stays	Despite a strong pipeline of non-tourism projects, there is a relatively small proportional focus on tourism projects in the Mid West, creating crowding-out challenges for investment/construction viability. This is also present in other regions of the WA, apart from the South West.
 SHORT STAY ACCOMMODATION	There is a good cross section of accommodation types in the region, including caravan parks, backpacker hostels, motels, hotels and apartments.	There are noticeable seasonal fluctuations in visitor nights, while still being relatively moderate, this could lead to inconsistent revenue streams for certain submarkets, impacting overall profitability	- Subject to further analysis and stakeholder engagement, an additional global branded accommodation property would appeal to international markets. Additionally, eco-resorts could be explored to offer a more immersive nature experience. - A lack of recognised resorts offering with a full range of expected amenities as well as upscale and luxury properties present opportunities that could be further tested.	- There is a general shortage of worker accommodation. As a result, in certain areas of the Mid West, such as Geraldton, major project workforces has led to workers also occupying short-stay accommodation. - More visitors opted for non-commercial accommodations, with commercial caravan parks being the next popular choice.
 TOURISM WORKFORCE	1,618 tourism jobs in Mid West, 60% in Greater Geraldton, 13% in Kalbarri; - Visitor Economy seasonal but no significant variation. 145k bump in September quarter nights (no low-season).	Inability to compete with higher-earning roles in the dominant Mid West mining-sector increases turnover and sector-leakage of otherwise suitable workers.	Greater levels of specialised tourism and hospitality training throughout WA could enhance long-term recruitment prospects for employees.	Severe shortages in worker housing is a major and difficult-to-overcome constraint for transient worker recruitment in the Mid West.

MID WEST TOURISM ACCOMMODATION STUDY GERALDTON & KALBARRI

STAGE 2 AND 3 RESEARCH

An analysis of the demand, constraints and
feasibility for visitor and tourism worker
accommodation in Geraldton and Kalbarri, WA

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Geraldton Accommodation Analysis	5
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Opportunity and Demand Analysis	27

PRELIMINARY FINDINGS

Visitor Market Segments and Suitable Short Stay Accommodation Options

SEGMENT	SUB-SEGMENT	VISITATION TO GERALDTON	VISITATION TO KALBARRI	YIELD	GEOGRAPHIC	ACCOMMODATION CATEGORY
Corporate/Business		High	Low	High	Intrastate, Interstate	Resort, Hotel (mid-range and above), Serviced Apartment
Couple/Honeymooners		Low	High	Medium-High	Intrastate, Interstate	Resort, Hotel (mid-range and above), Caravan Park
Families		Moderate	High	Medium-High	Interstate, Intrastate, International	Resort, Hotel (mid-range and above), Caravan Park, Serviced Apartments, Short Term Rental
VFR*		High	Low	Medium	Interstate, Intrastate	Serviced Apartments, Short Term Rental
Over 55's		High	High	Medium	Interstate, Intrastate	Resort, Hotel (mid-range and above), Caravan Park, Short Term Rental
Solo travellers		Moderate	Moderate	Medium	Interstate, Intrastate	Hotel (budget and above), Commercial Worker Accommodation
Self-drive		High	High	Medium	Interstate, International	Resort, Hotel (budget and above), Caravan Park, Serviced Apartment, Short Term Rental
Leisure	FIT*	Moderate	High	Medium-High	Interstate, Intrastate, International	Resort, Hotel (mid-range and above), Caravan Park, Serviced Apartment, Short Term Rental
	HVT*	Moderate	Moderate	High	Intrastate	Resort, Hotel (upscale and above)
	GIT*	High	High	Medium-High	International	Resort, Hotel (mid-scale and above)

*VFR stands for Visiting Friends and Families, FIT stands for Free Independent Travellers, HVT stands for High Value Travellers and GIT stands for Group Inclusive Travellers

Source: Tourism Research Australia, Urbis

PRELIMINARY FINDINGS

Our analysis of visitor data, accommodation audits, stakeholder discussions, supported by further assessment of case studies indicates that Geraldton would benefit from a branded upscale hotel or a serviced apartment whereas Kalbarri shows potential for a larger scale resort or caravan park with family-friendly facilities.

By 2034, the accommodation sector in Geraldton is projected to require an additional 130 to 191 rooms in hotels and similar establishments compared to 2024 levels. Similarly, Kalbarri is forecasted to necessitate an increase of 83 to 122 rooms in hotels and similar establishments by 2034.

There is significant upsides in introducing a national or internationally operated short stay accommodation in town. Economically, it stimulates investment and development, boosts local businesses through visitor spending, increases property values and council rates, and attracts more government and corporate events, enhancing the town's capacity.

In the realm of tourism and hospitality, such an establishment has the potential to heighten the town's appeal, garner international and domestic recognition, improve tourism infrastructure, offer luxury and higher standards, and set higher accommodation rates, which may help support the viability of future short-stay developments.

Proposed Short Stay Accommodation Offering for Geraldton and Kalbarri				
REGION	SHORT STAY CONCEPT	OPERATOR	SCALE	FACILITIES
Geraldton	Upscale hotel / serviced apartment	Branded international/ national operator	100 – 150 rooms	Restaurant and a concept bar, with potential to add meeting and event facilities, a gym and/or a swimming pool
Kalbarri	Resort / Caravan Park	Branded national operator	20 – 30 cabins / chalets / rooms 150 – 250 caravan / camping sites	Family friendly facilities, which may include a resort style pool, playground, recreation room and BBQ Facilities

Source: Urbis

01

GERALDTON ACCOMMODATION ANALYSIS

KEY INSIGHTS

1

Ages 50-64 have increased to now make up over 37% of domestic tourists. This trend is consistent with the overall patterns in the Mid West region.

2

Geraldton's short-stay market is mostly independently branded and operated, with no deluxe to luxury options. The audit identified 26 establishments with over 1,300 units / sites.

3

Short-term rentals play a crucial role with healthy year-round occupancy levels and increasing average daily rates. The current market shows a notable demand for luxury options, indicating a potential sizeable market that is yet to be serviced by sufficient levels of hotel-style establishments.



ACCOMMODATION ANALYSIS | VISITOR TRENDS

The City of Geraldton has seen a significant shift in its visitor demographics, with a notable increase in domestic visitors aged 50-64, who are staying an average of 3 days per trip.

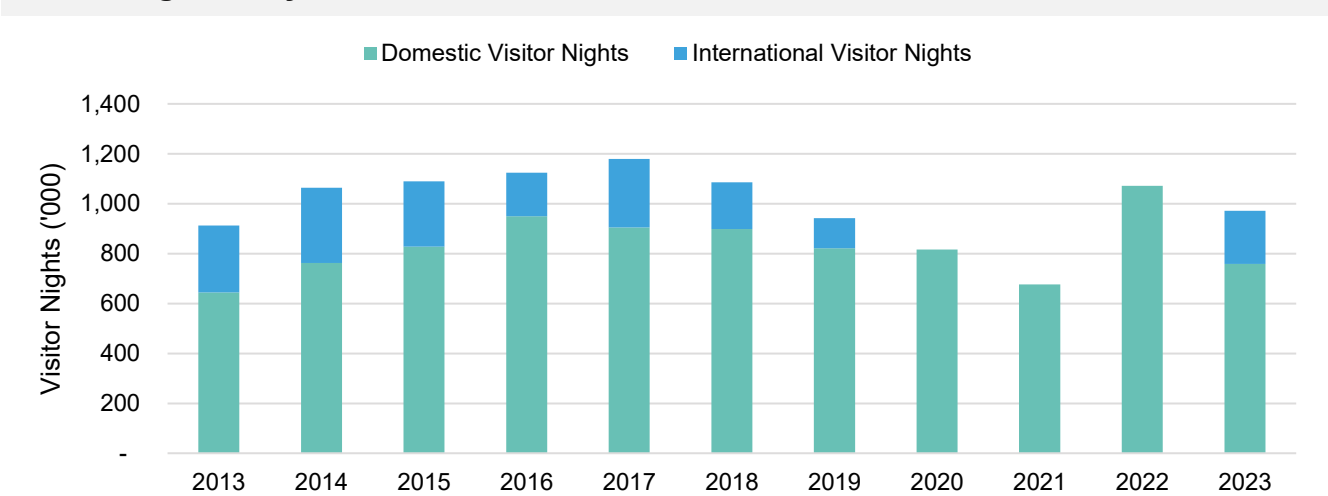
In 2022 and 2023, this age group made up over 37% of domestic visitors, a significant rise from 25% in 2018 and 2019. This trend is consistent with the overall pattern in the Mid West region, where older age groups continue to dominate domestic tourism. Over the same period, approximately 38% of visitors came for holidays, with the top trip activities include eating out and going to the beach. This visitation figure also include those coming into the region to participate in sports activities such as windsurfing or fishing. In contrast to Kalbarri, business visitors in Geraldton form a more notable cohort, accounting for 26% of total visitation.

International visitors, although only making up 8% in 2023, have shown distinct travel preferences.

In 2023, 44% of international tourists chose to travel in pairs. Despite the shorter average trip length for domestic visitors, the average length trip for international tourists averaged at 8.2 days. Geraldton experienced its lowest visitor numbers in the past decade in 2021, but has since seen a strong recovery, returning to pre-COVID visitation rates, reflecting trends seen in Western Australia and Australia as a whole.

Top 3 Trip Activities for Visitors*	
#1	Eat out / dine at a restaurant and / or café (47%)
#2	Go to the beach (30%)
#3	Visit Friends & Relatives (23%)

Visitor Nights, City of Greater Geraldton, 2013 - 2023



Source: Tourism Research Australia, Urbis
Note: There are zero international visitor numbers recorded for years 2020, 2021 and 2022 due to Covid-19 period data reliability

Overnight Visitor Metrics*			
CITY OF GREATER GERALDTON	AVERAGE TRIP LENGTH	AVERAGE TRIP SPEND	AVERAGE DAILY SPEND
DOMESTIC	3 days	\$864	\$327
INTERNATIONAL	8.2 days	\$654	\$79
TOTAL	3.1 days	\$847	\$273

*Note: 2023
Source: Tourism Research Australia

Visitor Demographics, City of Greater Geraldton*

50-64
Domestic age group with highest trips
In 2022+23 (37% of travellers)

38%
Domestic visitors reason for travel is holiday
In 2022+23

20-34
International age group with highest trips
In 2023 (38% of travellers)

44%
International visitors travel as a couple
In 2023

ACCOMMODATION ANALYSIS | VISITOR TRENDS (CONT.)

Visitor accommodation preferences in the City of Geraldton have shifted towards non-commercial and unserviced rental options over the past 10 years.

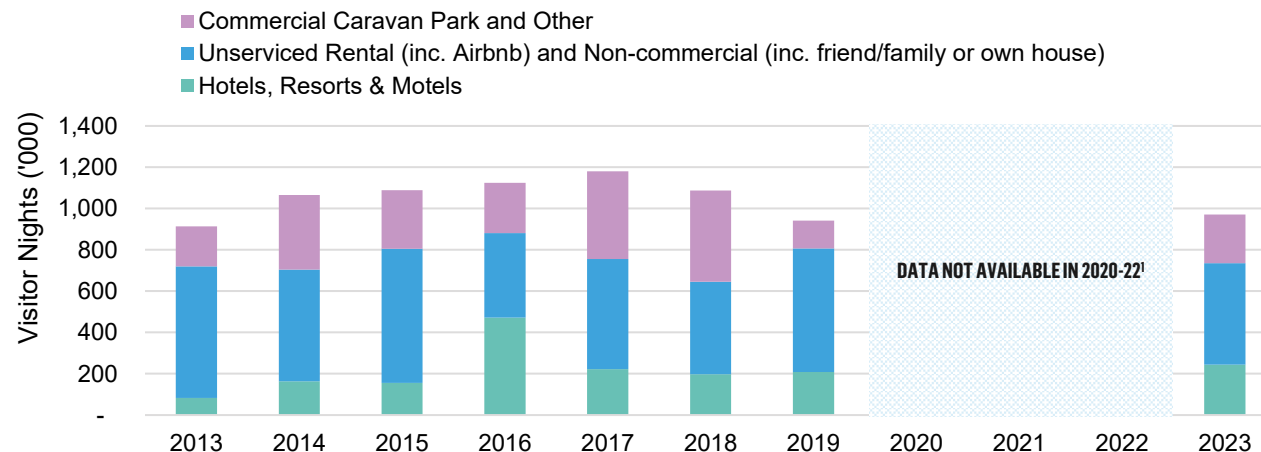
Over the past decade, most visitors have opted to stay in non-commercial accommodation (which includes with family and friends, in their own homes, and in non-commercial caravan or camping accommodation) and unserviced rental accommodation (including Airbnb). The next most popular choice has been commercial caravan parks, while the use of hotels, resorts and motels has varied throughout the years.

In 2016, there was a notable rise in visitor nights spent in hotels, resorts, and motels, with over 42% of visitors opting for these accommodations, a significant jump from the 10-year average of 15%. This surge is likely caused by a substantial increase in business visitors, who were 52% of visitors in 2016.

Prior to the COVID-19 pandemic, the region experienced a significant drop in the number of working holidays visas. From 2013 to 2019, there was an 84% decrease in working holiday makers, with the majority of this decline occurring between 2015 to 2019. This trend is consistent with the broader pattern in WA and nationally in Australia, influenced by factors such as changes in visa regulations, economic conditions, and competition from other working holiday destinations.

In 2023, visitor nights exceeded 900,000, with the majority of guests opting for unserviced rentals and non-commercial accommodations. Despite this preference, commercial caravan parks and other accommodations saw a remarkable 73% increase from 2019 to 2023.

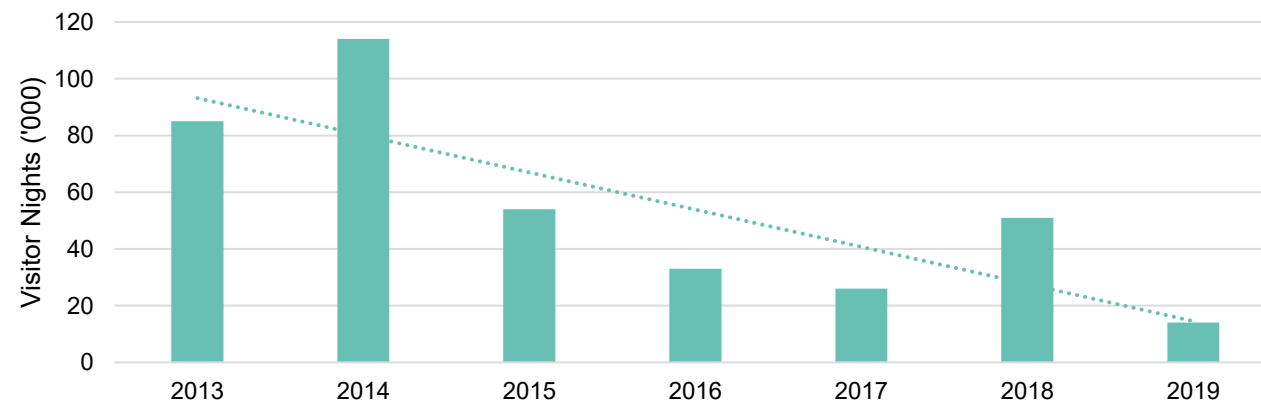
Accommodation Choice, City of Greater Geraldton, 2013 - 2023



Source: Tourism Research Australia, Urbis

¹There are no international visitor numbers recorded for at a local-level in years 2020, 2021 and 2022 due to the Covid-19 pandemic.

Working Holiday Visas (International Visitors), City of Greater Geraldton, 2013 - 2019



Source: Tourism Research Australia

Note: 2017 data was a small sample size and should be used with caution. Data post 2019 is not available due to small sample size.

ACCOMMODATION ANALYSIS | SHORT STAY VISITOR ACCOMMODATION

In Q1 2025, an audit of short-term accommodation was conducted to capture the majority of short stay visitor accommodation in the Geraldton Urban Centre and its surrounding areas within a 15-minute drive from the town centre.

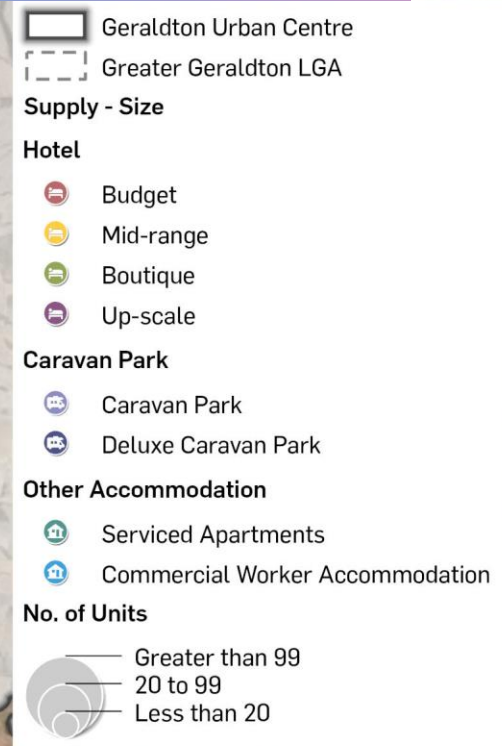
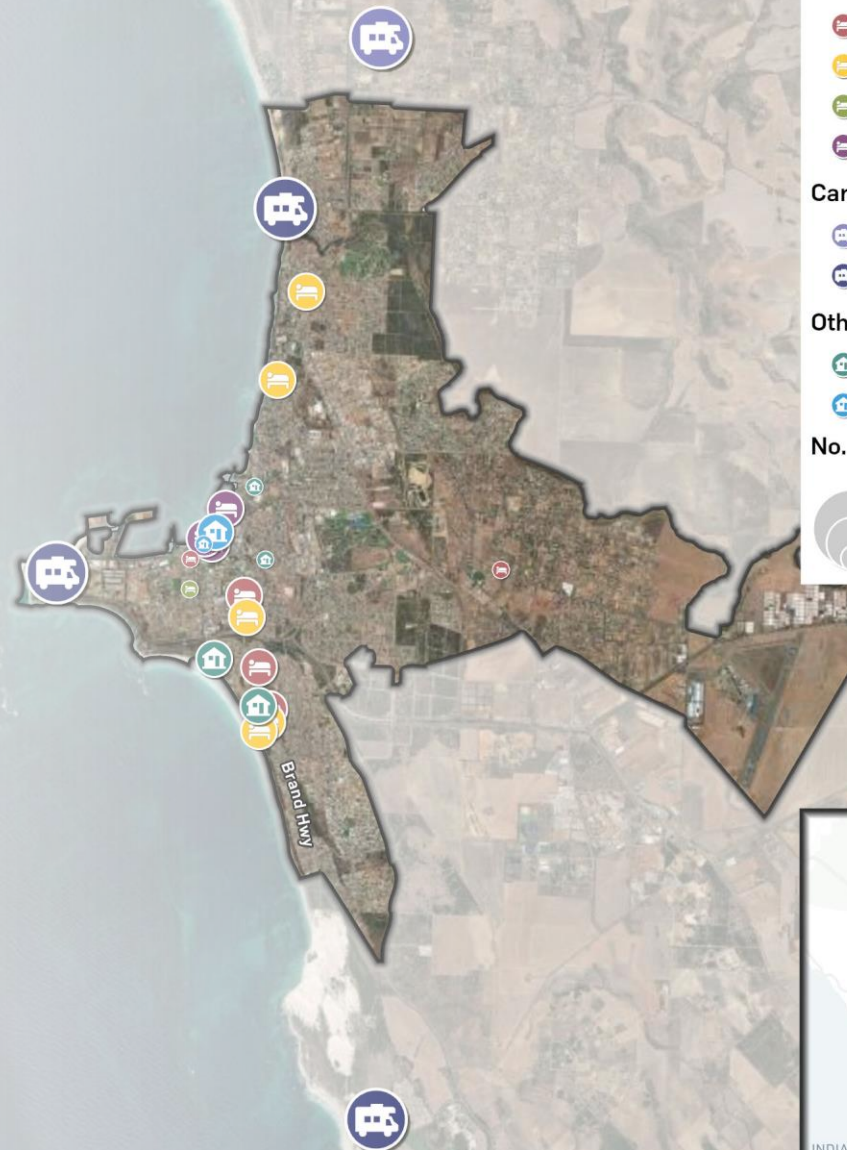
The audit classified accommodation into the following categories, based on Tourism WA's tourist accommodation classifications.

- Resorts
- Hotels: Boutique, Budget, Mid-Range, Up-Scale, Deluxe, Luxury
- Caravan Park: Caravan Park, Deluxe Caravan Park
- Campgrounds
- Serviced Apartments
- Short-Stay Rentals¹
- Commercial Worker Accommodation

This study additionally identified several key characteristics of the short stay accommodation market.

- There are very few accommodation options outside the main city centre of Geraldton, with the main concentration being along Brand Highway, Cathedral Avenue, and in and around Foreshore Drive and Marine Terrace.
- There are no resorts, deluxe, or luxury hotel accommodations offered in Geraldton.
- 70% of the accommodations establishments in the catchment are independently branded and operated, with 15% branded under a domestic brand and 15% under an international brand.
- Few developments on the coast that truly capitalise on the location, views, and access, presenting a missed opportunity and a potential point of difference for new projects.

¹The spatial distribution and analysis of short-stay rentals are presented separately on pages 13 and 14.



ACCOMMODATION ANALYSIS | SHORT STAY VISITOR ACCOMMODATION (CONT.)

The audit of short-stay accommodation in and around Geraldton Urban Centre area estimated a total of 26 establishments (excluding short term rentals) and over 1,300 units / sites.

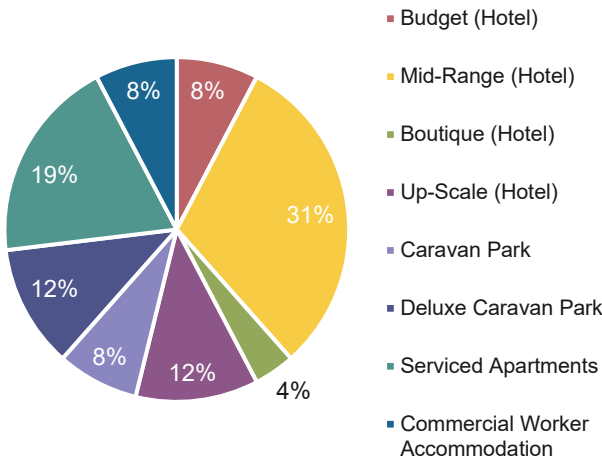
The audit was undertaken in Q1 2025 and included hotels, motels, resorts, caravan parks and serviced / self-contained apartments, but excluded private rentals such as rooms bookable on sites such as AirBnB.

Most hotels fall within the 20 to 100 rooms category, with 10 smaller hotels having fewer than 20 rooms. Apart from holiday and caravan parks, there are no establishments with more than 100 rooms, indicating a potential shortfall in large-scale accommodations for groups such as tours and sports teams.

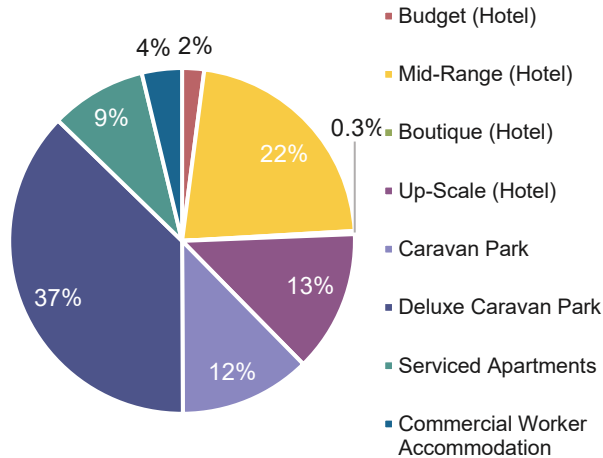
While there are internationally branded establishments such as Ibis Styles, Mantra, and Nesuto, their scale is smaller compared to their international counterparts. The Ocean Centre Hotel, with 94 rooms, is currently the largest establishment in Geraldton outside of caravan parks.

Compared to other regions in WA, such as the South West, it is apparent that Geraldton currently has fewer higher-end accommodation options, such as upscale and deluxe.

Supply by Proportion of Establishments



Supply by Proportion of Units/Sites



Source: Urbis

Short Stay Accommodation Supply Breakdown

ACCOMMODATION TYPE	NO. OF ESTABLISHMENTS	NO. OF UNITS/SITES*	MEAN NO. OF UNITS/SITES*
Budget (Hotel)	2	28	14
Mid-Range (Hotel)	8	299	37
Boutique (Hotel)	1	4	4
Up-Scale (Hotel)	3	180	60
Caravan Park	3	391	118
Deluxe Caravan Park	2	283	97
Serviced Apartments	5	122	24
Commercial Worker Accommodation	2	51	26
Total	26	1,358	52

Source: Urbis

*Note: The total number of units/sites also includes caravan and camping sites provided in holiday and caravan parks. Mean and median figures refer to mean and median number of rooms per establishment of the corresponding category. Please see appendix for accommodation type definitions

ACCOMMODATION ANALYSIS | SHORT STAY VISITOR ACCOMMODATION (CONT.)

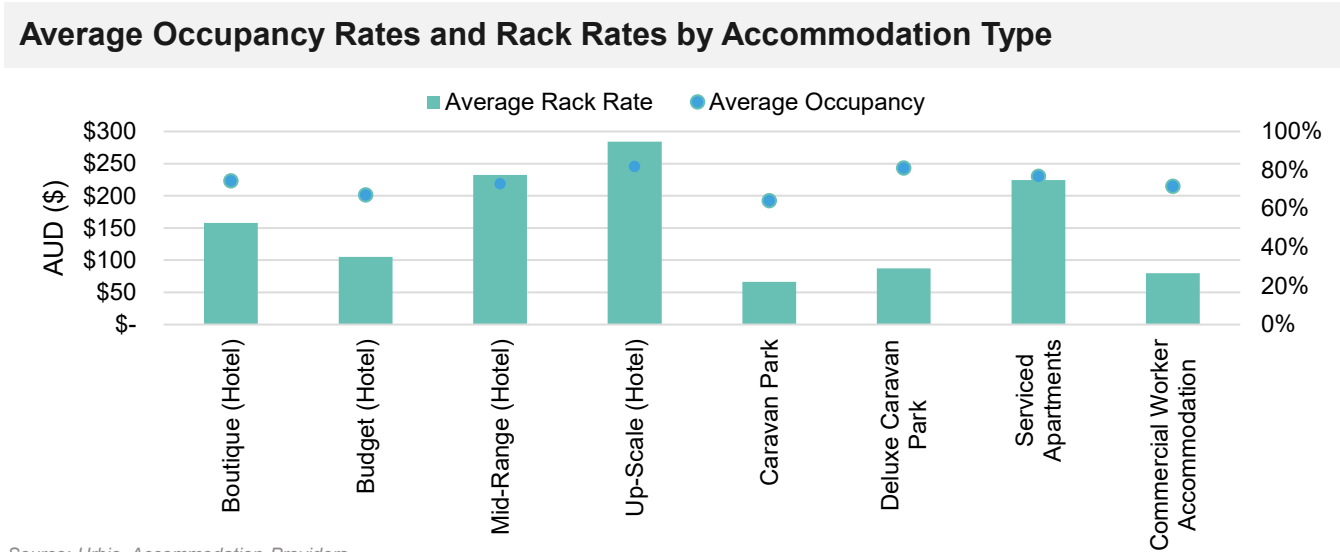
Higher occupancy rates were estimated for mid-range and upscale hotels, indicating a strong preference for quality accommodations with self contained amenities.

Occupancy rates (informed by engagement with providers) show moderate to high variability depending on the season, with low season from June to July while the high season runs from September to February, especially during wildflower season. This variation also depends on the type and scale of the establishment.

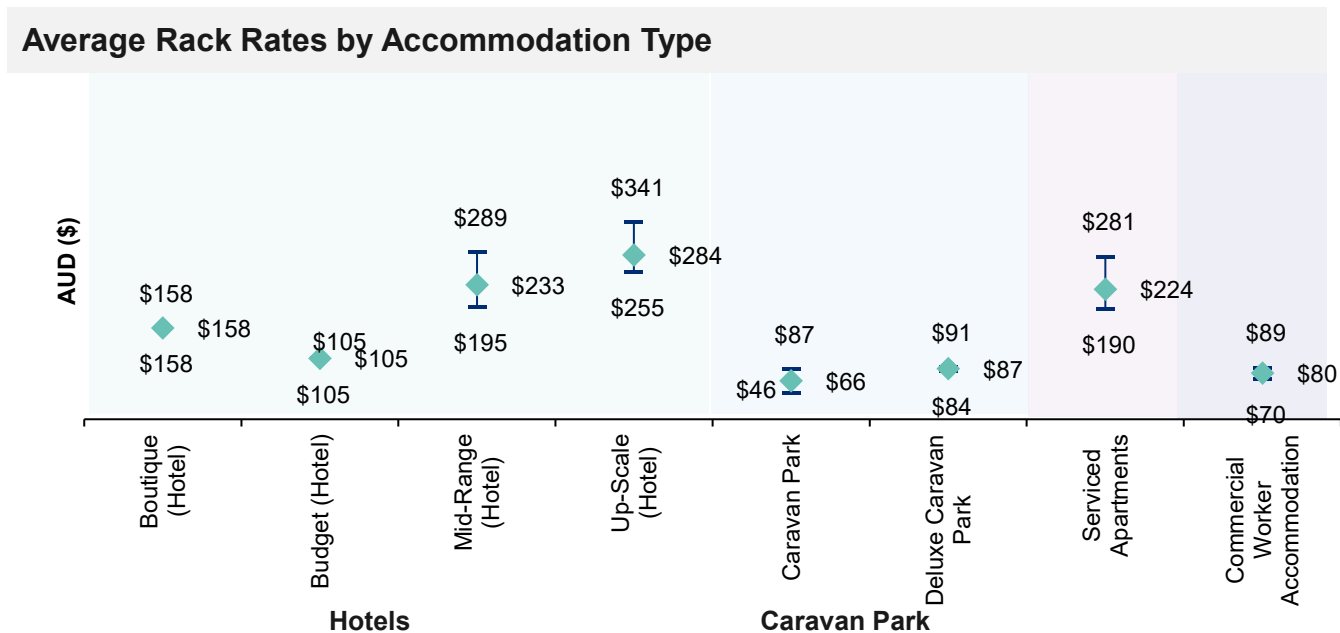
Mid-range and up-scale hotel accommodations with diverse room types maintain higher and steadier occupancy rates, attracting longer-stay corporate and business visitors. Larger mid-range establishments also appeal to tour groups due to their standardised amenities and offerings.

Preference for quality accommodation is also reflected in caravan parks, with deluxe caravan parks demonstrating higher occupancy rates than standard ones.

Compared to Kalbarri, Geraldton generally has higher average daily rates for up-scale hotels due to branded options, but lower rates for caravan parks. Annually, Geraldton records higher average occupancy rates, driven by a more diversified demand base and less variation between peak and off-peak periods.



Source: Urbis, Accommodation Providers



Source: Urbis, Accommodation Providers

ACCOMMODATION ANALYSIS | CARAVAN AND HOLIDAY PARKS

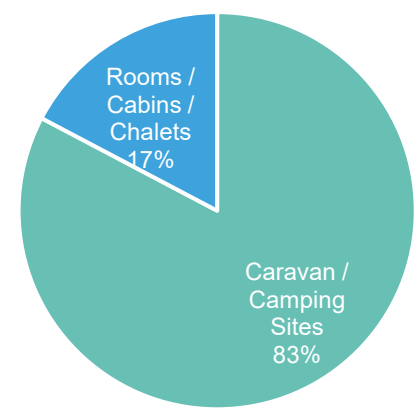
Rack rates for caravan and holiday parks in Geraldton show only a slight drop from peak to off-peak periods.

The audit identified five parks within a 15-minute drive of Geraldton's town centre: Sunset Beach Holiday Park, Geraldton Caravan Park, Geraldton Belair Gardens Caravan Park, Drummond Cove Holiday Park, and Double Beach Caravan Park. As illustrated on page 8, these properties are typically located along or near the coastline, to leverage convenient beach access and / or scenic views. It has been noted that Drummond Cove Holiday Park is set to close indefinitely by Q3 this year for major headworks and site renovations, before adding new infrastructure which may include a caravan park or key worker accommodation.

Caravan and camping sites make up 83% of the accommodation types offered, with the remaining 17% being a mix of motel rooms, cabins, and chalets. Peak season rack rates are approximately 6% higher for caravan/camping sites and 3% higher for rooms/cabins/chalets compared to off-peak rates. Some properties maintain consistent rates year-round, with no dynamic pricing.

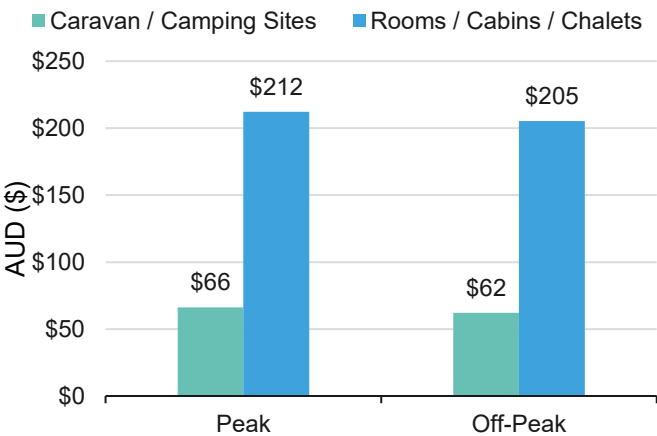
Most parks offer similar facilities, including swimming pools, playgrounds, BBQ areas, and camp kitchens, with some providing additional amenities like games rooms and tennis courts.

Proportion of Supply by Type

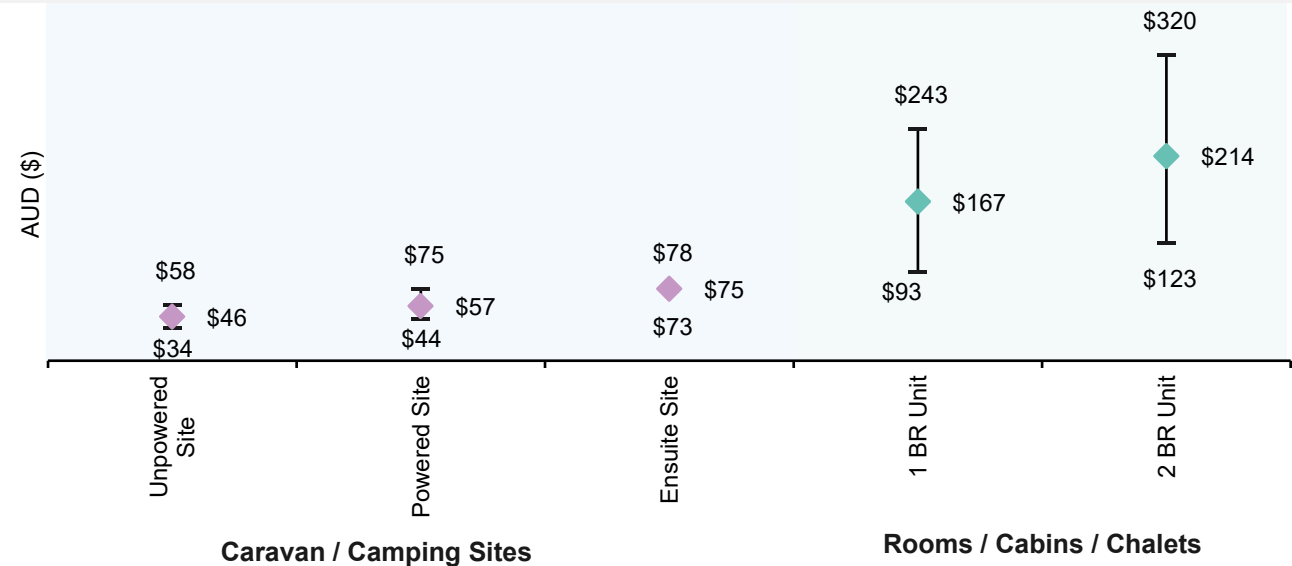


Source: Urbis, Accommodation Providers

Average Rack Rates by Seasonality



Average Rack Rates by Accommodation Type



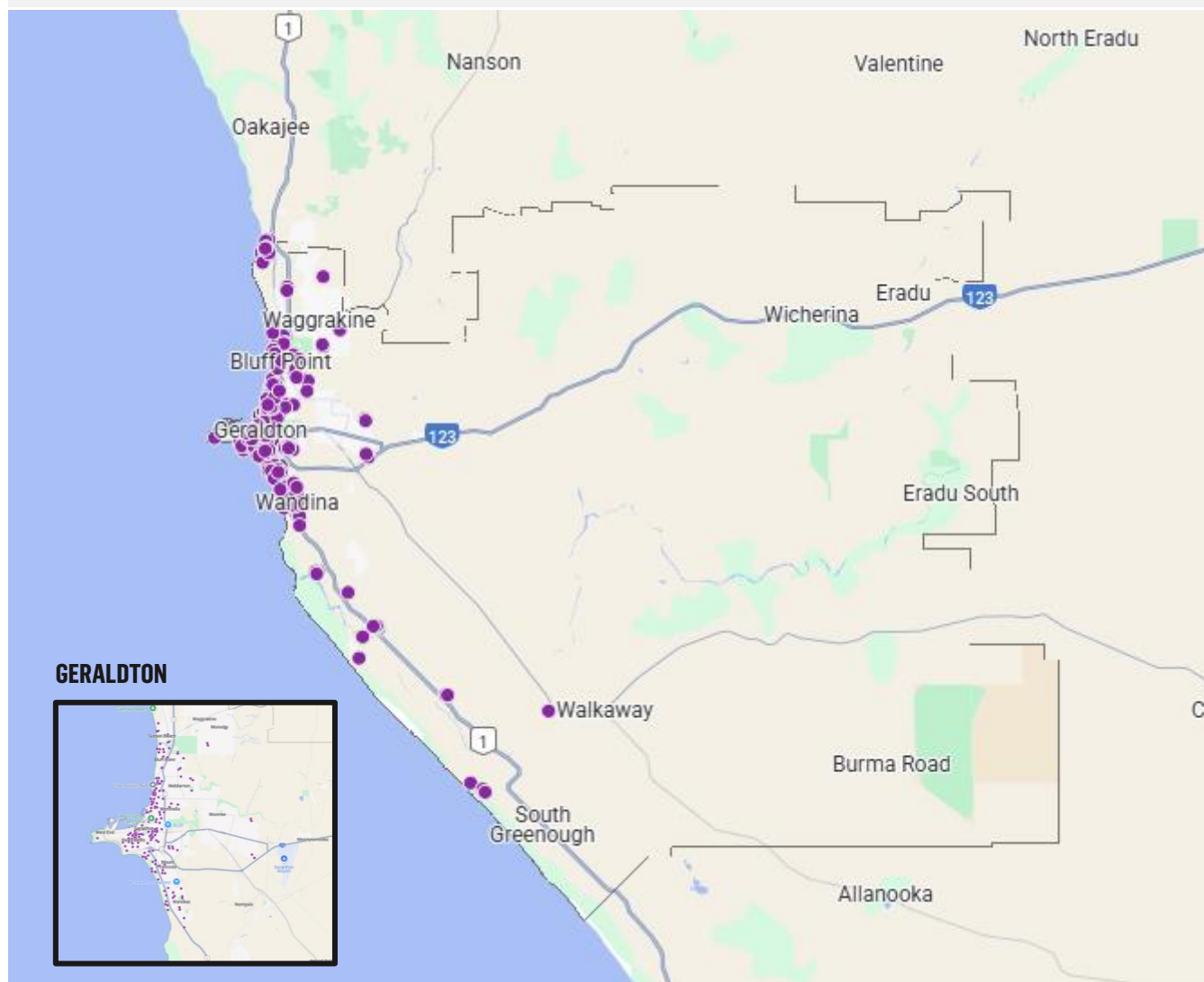
ACCOMMODATION ANALYSIS | SHORT TERM RENTALS

Short term rentals currently play an important role in the Geraldton market, with approximately 140 to 170 listings booked each month in 2024.

A review of AirDNA research identified the following key attributes and trends.

- **Listing Seasonality:** Across the short-term rental market in Geraldton, booked listings are relatively consistent, averaging 162 per month, with only the months of November and February falling below 160 listings.
- **Healthy Year-round Occupancy Levels:** Occupancy rates in the Geraldton market have little variability in most months. September has the highest levels of 85%, June had the lowest levels of 57%, all other months ranged 62-77% helping support year-round operation for most properties (2024).
- **Increasing Average Daily Rates:** The latter months of the year, particularly October to December typically achieve higher average daily rates for rented rooms and properties, at circa 9% higher than the rest of the year (2024).
- **Changing Future Landscape:** New statewide STRA legislation requiring registration and development approval decision-making by local councils for un-hosted short term rental accommodation properties will likely dampen future growth in this sector, as prospective providers must deal with additional legal hurdles and approvals before commencing operation, in addition to modest annual registration fees.

Short Term Rental Properties, Geraldton Region



Source: AirDNA

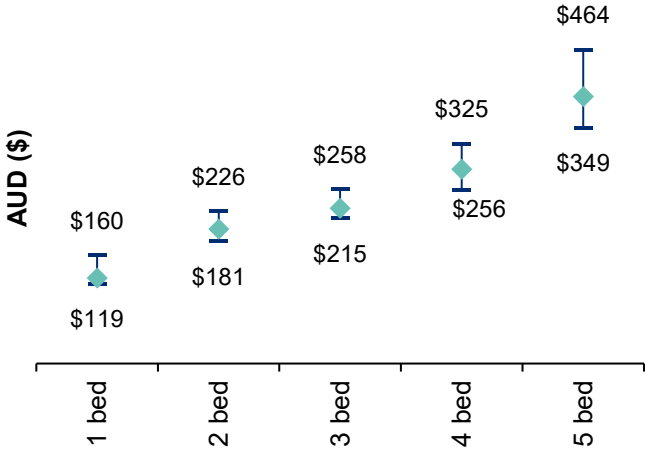
Note: Geraldton Region as defined by AirDNA includes all of Geraldton's urban centre, and surrounding areas including Drummond Cove and Greenough

ACCOMMODATION ANALYSIS | SHORT-TERM RENTAL MARKET

The apparent demand for listings classified as luxury indicates a potential sizeable market for more hotel-style establishments.

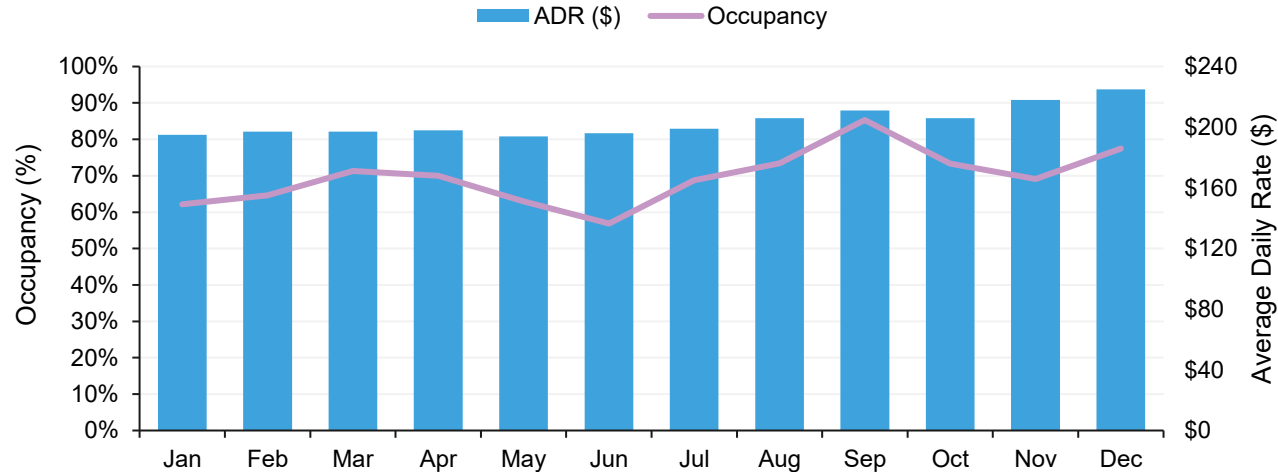
Short-term rental listings have a relatively even distribution of one, two and three bed listings, at circa 28-30% each, the remaining 14% of listing comprise four- and five-bedroom listings, suitable for families or groups. Price premiums were greatest when moving from one to two bedroom bookings, at 57% higher median daily rate, whereas three bedrooms are just 15% higher than their two bedroom counterparts. Larger price ranges were present for the higher four and particularly five bedroom listings, as the size and quality gap widens, approximately 21% of listings classed as luxury. The notable level of luxury listings indicates a potential sizeable market that is yet to be serviced by sufficient levels of hotel-style establishments, that is being partially serviced by short-term rental properties.

Monthly Median ADR Range by Room Type



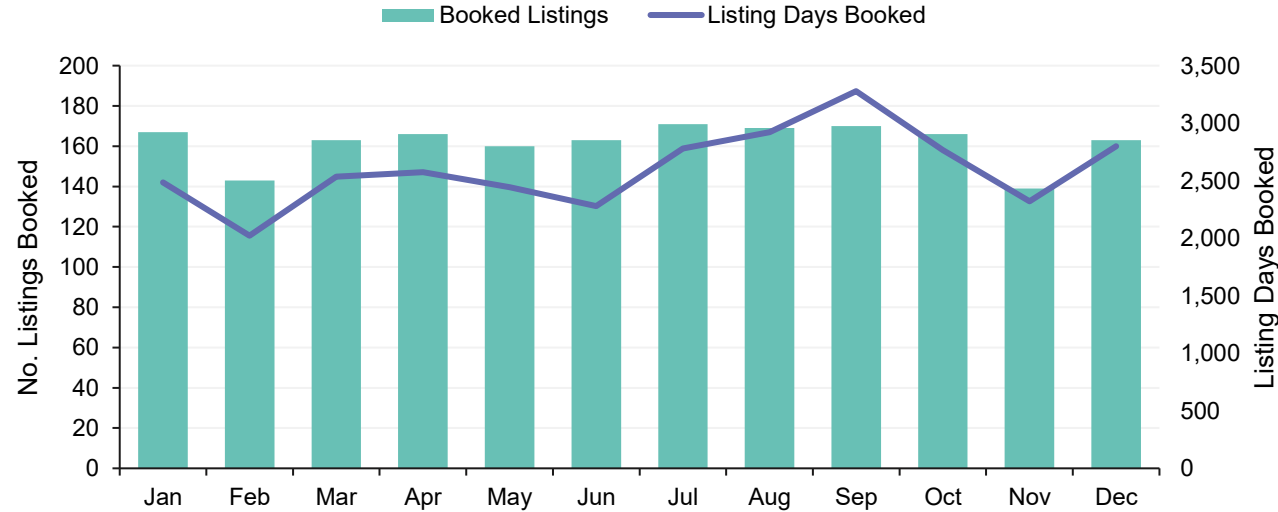
Source: AirDNA
Note: 12 months to Nov 2024. Geraldton region as defined by AirDNA
Mid West Tourism Accommodation Study

Short-term Rentals, Occupancy & Advertised Rate, 2024



Source: AirDNA

Short-term Rentals, Listings & Listing Days Booked, 2024



Source: AirDNA

02

KALBARRI ACCOMMODATION ANALYSIS

KEY INSIGHTS

1

Older visitors (65+) now make up over 33% of domestic visitors, doubling in the last 5 years.

2

The current market shows a notable preference for Commercial Caravan Parks, with overall rack rates higher than those in Geraldton.

3

Kalbarri's short term rental market, like the rest of the short stay market, is highly seasonal. There is a clear premium on larger family accommodations, reflecting strong family holiday demand.

ACCOMMODATION ANALYSIS | VISITOR TRENDS

The visitor market of Northampton is predominantly a tourist market with minimal business visitors and those visiting family / friends, with an average trip length of 3.6 days.

In 2023, the Shire of Northampton's visitor market, primarily tourists with few business or family / friend visitors, saw individuals aged 65+ become the largest domestic visitor group, comprising over 33% of domestic visitors. This is a significant increase from 2018 and 2019, when they represented only 17% of visitors. This trend aligns with the overall pattern in the Mid West region, where older age groups collectively continued to constitute the majority of domestic visitors.

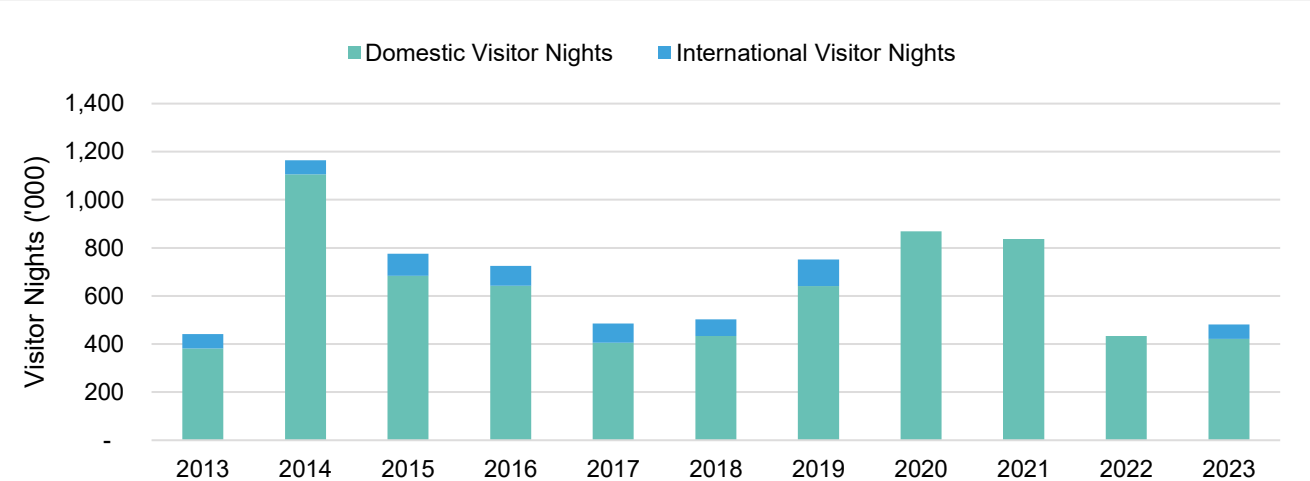
In 2022 and 2023, families and groups of friends or relatives accounted for 42% of domestic visitors, which has helped to support demand for establishments with larger units.

Over the past decade, the Shire has experienced fluctuating numbers of total visitor nights, reaching a peak of over 1.1 million in 2014. However, there has been a slight decline in visitors over the past five years, with visitor nights in 2022 being the lowest in the past decade (influenced by Cyclone Seroja in 2021).

The international market is notable, albeit small (16% in 2023).

The largest group of international tourists in 2023 chose to travel in pairs, with 43% preferring this arrangement. Solo travelers made up 26% of travelers, whilst 17% of visitors were families and 13% were friends/relatives in 2023. While international visitors to Geraldton tend to have longer average trip lengths, those travelling to Northampton opt for shorter stays, averaging just 2.7 days. Both of these visitor trends are in line with the visitor trends of the Mid West region as a whole.

Visitor Nights, Shire of Northampton, 2013 - 2023



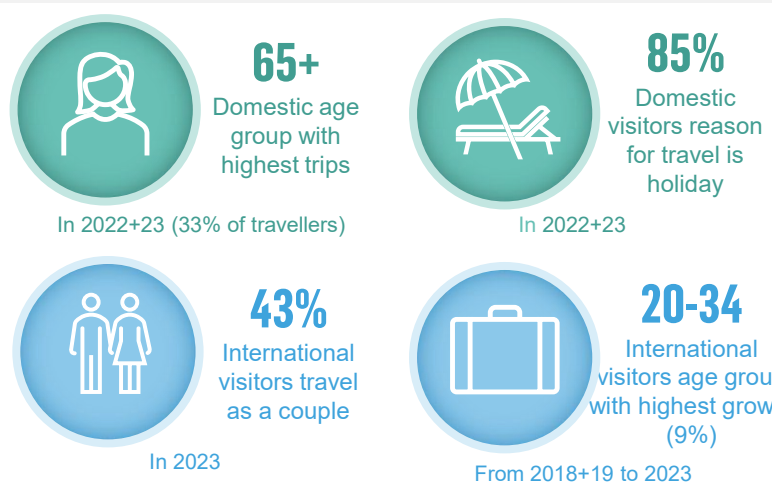
Source: Tourism Research Australia, Urbis
Note: There are zero international visitor numbers recorded for years 2020, 2021 and 2022 due to Covid-19 period data reliability
2023 domestic data was a small sample size and should be used with caution

Overnight Visitor Metrics¹

SHIRE OF NORTHAMPTON	AVERAGE TRIP LENGTH	AVERAGE TRIP SPEND	AVERAGE DAILY SPEND
DOMESTIC	3.6 days	\$586	\$163
INTERNATIONAL	2.7 days	\$435	\$161
TOTAL	3.5 days	\$573	\$163

¹Note: 2023
Source: Tourism Research Australia

Visitor Demographics, Shire of Northampton



ACCOMMODATION ANALYSIS | VISITOR TRENDS (CONT.)

Over the past ten years, the majority of visitors to the Shire have opted to stay in **Commercial Caravan Parks and other similar accommodations**.

The popularity of Unserviced Rentals and Non-commercial, and Hotels, Resorts & Motels options has fluctuated over this period. In 2023, these latter two categories represented the smallest share of accommodation choices since 2014.

The preference for Commercial Caravan Parks and Other accommodations aligns with the primary reason for visiting the Shire, as over 84% of visitors in 2023 were holidaymakers.

There was a decline in working holiday visas in the years leading up to the Covid-19 pandemic. Although there has been an increase in working holiday visitors since 2019, the numbers have continued to decrease from a peak of over 23,000 visitor nights in 2017.

Top 3 Trip Activities for Visitors*

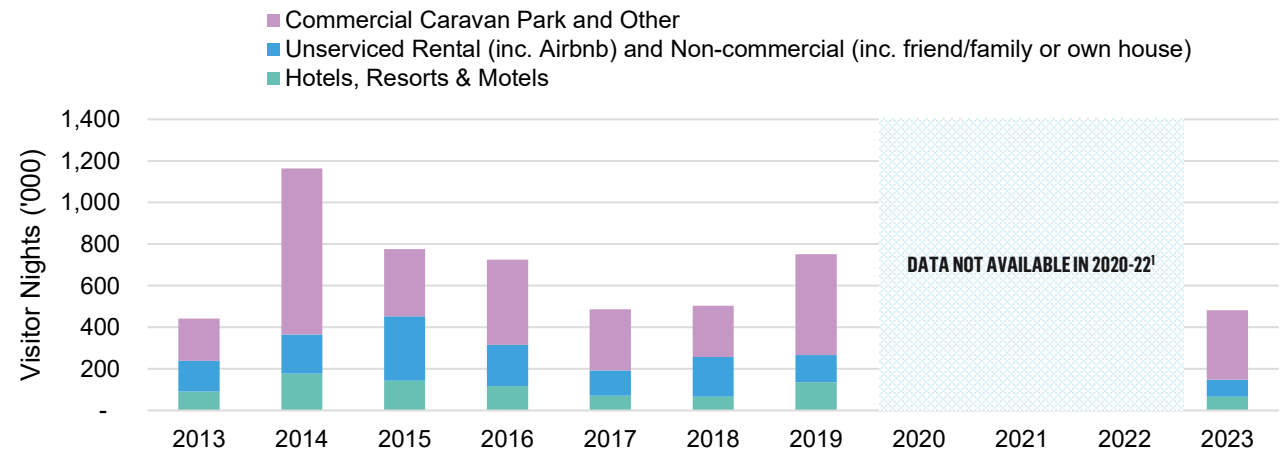
SHIRE OF NORTHAMPTON

#1	Eat out / dine at a restaurant and / or café (41%)
#2	Go to the beach (31%)
#3	Visit National Parks / State Parks (28%)

*Note: 2023. Based on domestic visitor nights

Source: Tourism Research Australia

Visitor Nights by Accommodation Type, Shire of Northampton, 2013 - 2023

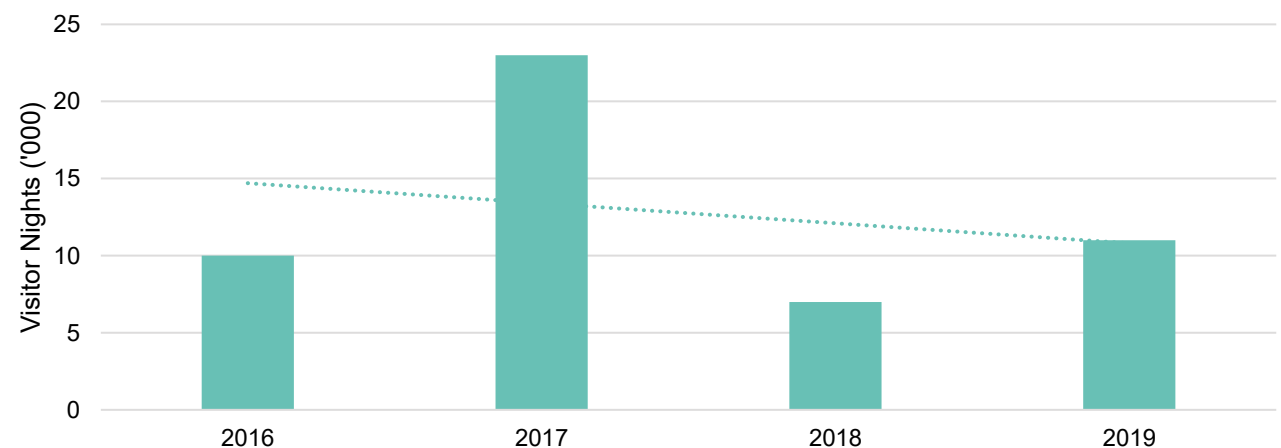


Source: Tourism Research Australia, Urbis

¹There are no international visitor numbers recorded for at a local-level in years 2020, 2021 and 2022 due to the Covid-19 pandemic.

Note: 2023 data was a small sample size and should be used with caution

Working Holiday Makers, Shire of Northampton, 2013 - 2023



Source: Tourism Research Australia

Note: Data post 2019 is not available due to small sample size.

ACCOMMODATION ANALYSIS | SHORT STAY VISITOR ACCOMMODATION

In Q1 2025, an audit of short-term accommodation was conducted to capture the majority of short stay visitor accommodation in the Kalbarri Urban Centre and its surrounding areas within a 15-minute drive from the town centre.

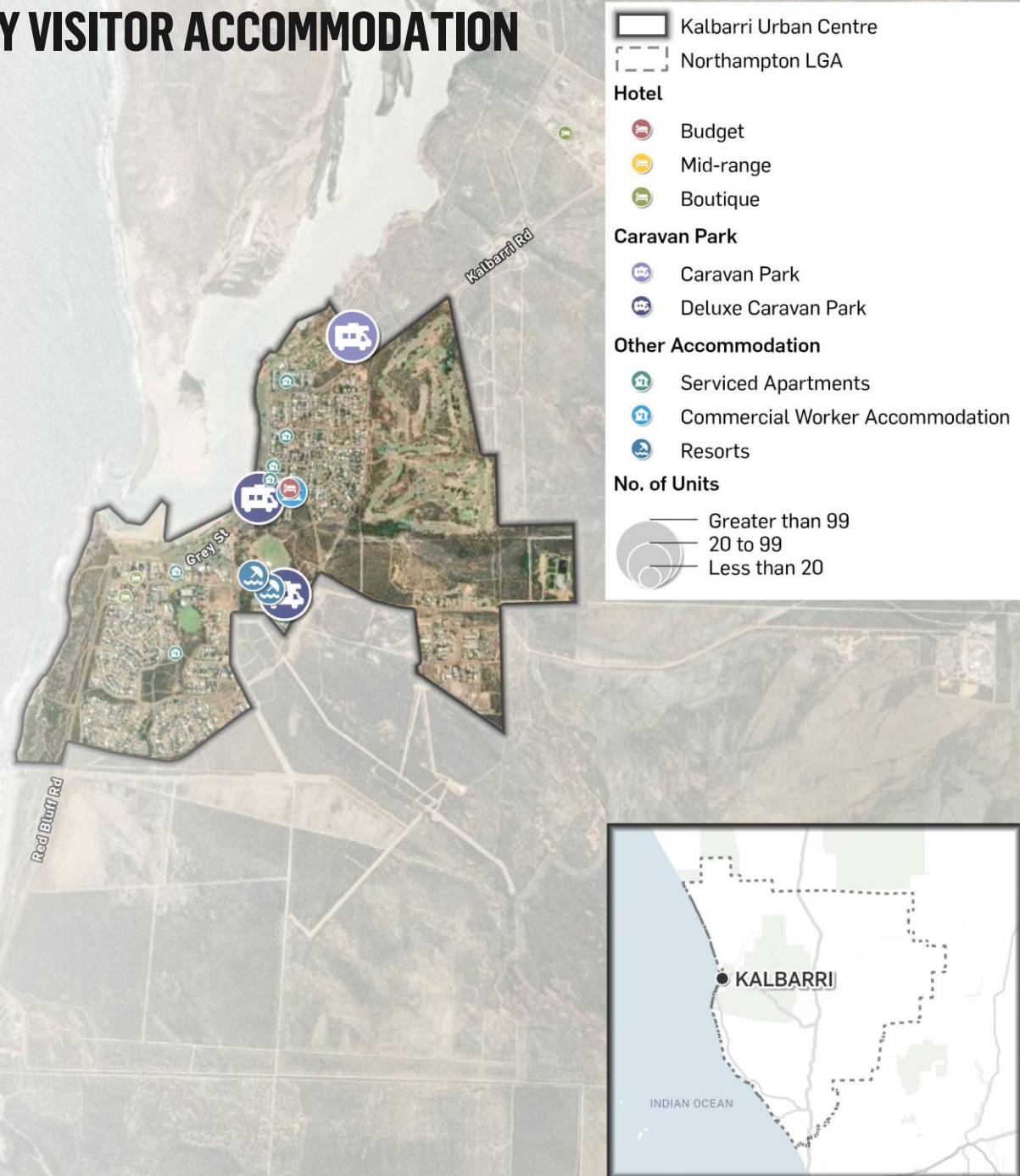
The audit classified accommodation into the following categories.

- Resorts
- Hotels: Boutique, Budget, Mid-Range, Up-Scale, Deluxe, Luxury
- Caravan Park: Caravan Park, Deluxe Caravan Park
- Campgrounds
- Serviced Apartments
- Short-Stay Rentals¹
- Commercial Worker Accommodation

This study additionally identified several key characteristics of the short stay accommodation market

- Majority of the accommodation options are in the Kalbarri town center.
- There are a large number of smaller-sized and family-owned establishments.
- There have been several accommodation facilities that have completed upgrades in the last couple of years (after Cyclone Seroja).
- 80% of accommodations options in the area are independently branded and operated, with the remaining under domestic operators and no presence of international operators

¹The spatial distribution and analysis of short-stay rentals are presented separately on pages 22 and 23.



ACCOMMODATION ANALYSIS | SHORT STAY VISITOR ACCOMMODATION (CONT.)

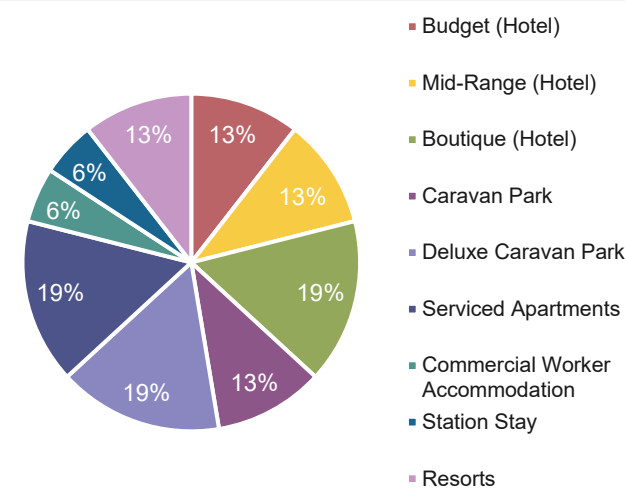
The audit of short-stay accommodation in the Kalbarri Urban Centre estimated a total of 18 establishments (excluding short term rentals) and about 880 units / sites.

The audit done in Q1 of 2025, encompassed hotels, motels, resorts, caravan parks, and serviced or self-contained apartments. It did not include private rentals, such as rooms available on platforms like AirBnB and Vrbo.

The vast majority of hotels have fewer than 100 rooms, with 9 establishments having fewer than 20 rooms. There are only 3 accommodation establishments with over 100 units or sites, all of which are caravan parks. This indicates a potential shortfall in large-scale establishments that can accommodate larger groups, such as tours.

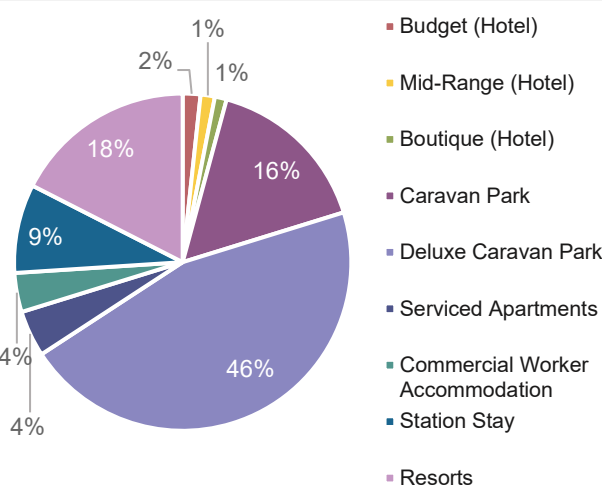
Occupancy rates show significant variation based on the season, with the low season occurring from November to March given occasional closures of the National Park caused by extreme weather, and the high season running from June to September.

Supply by Proportion of Establishments



Source: Urbis

Supply by Proportion of Units / Sites



Short Stay Accommodation Supply Breakdown

ACCOMMODATION TYPE	NO. ESTABLISHMENTS	NO. OF UNITS/SITES ¹	MEAN NO. OF UNITS/SITES ¹
Budget (Hotel)	2	15	8
Mid-Range (Hotel)	2	12	12
Boutique (Hotel)	3	10	3
Caravan Park	1	141	141
Deluxe Caravan Park	3	401	134
Serviced Apartments	3	39	13
Commercial Worker Accommodation	1	33	33
Station Stay	1	75	75
Resorts	2	154	77
Total	18	880	496

Source: Urbis, Accommodation Providers

Note: The total number of units/sites also includes caravan and camping sites provided in holiday and caravan parks.
Mean and median figures refer to mean and median number of rooms per establishment of the corresponding category
Please see appendix for accommodation type definitions

ACCOMMODATION ANALYSIS | SHORT STAY VISITOR ACCOMMODATION (CONT.)

In Kalbarri, there is a notable demand for deluxe caravan parks, as supported by the higher proportion of holiday visitors coming into the region.

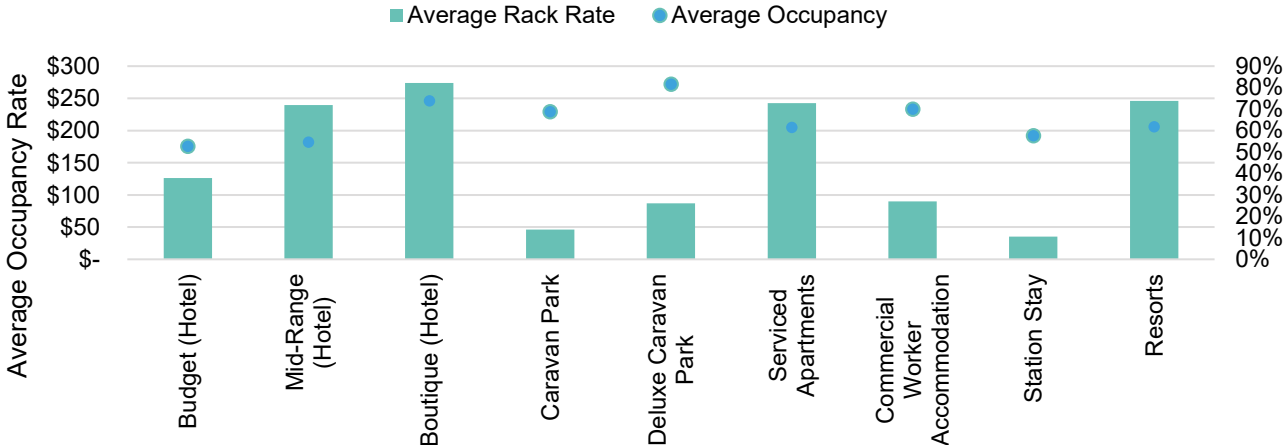
Higher occupancy rates are also recorded for caravan park, commercial worker accommodation (which includes hostels for backpackers) and boutique hotels.

In terms of rack rates, mid-range and boutique hotels, as well as resorts, are all recording similar levels of \$240 - \$270 per night. Since the cyclone, some establishments, such as Kalbarri Motor Inn and Kalbarri Palm Resort, have undergone refurbishments, which helps to justify these higher rates.

When compared to Geraldton, average rack rates in Kalbarri are higher for budget hotels, mid-range hotels, and serviced apartments, due to increased demand of the accommodation options in the region. Both types of caravan parks in Kalbarri have registered higher rates than those in Geraldton.

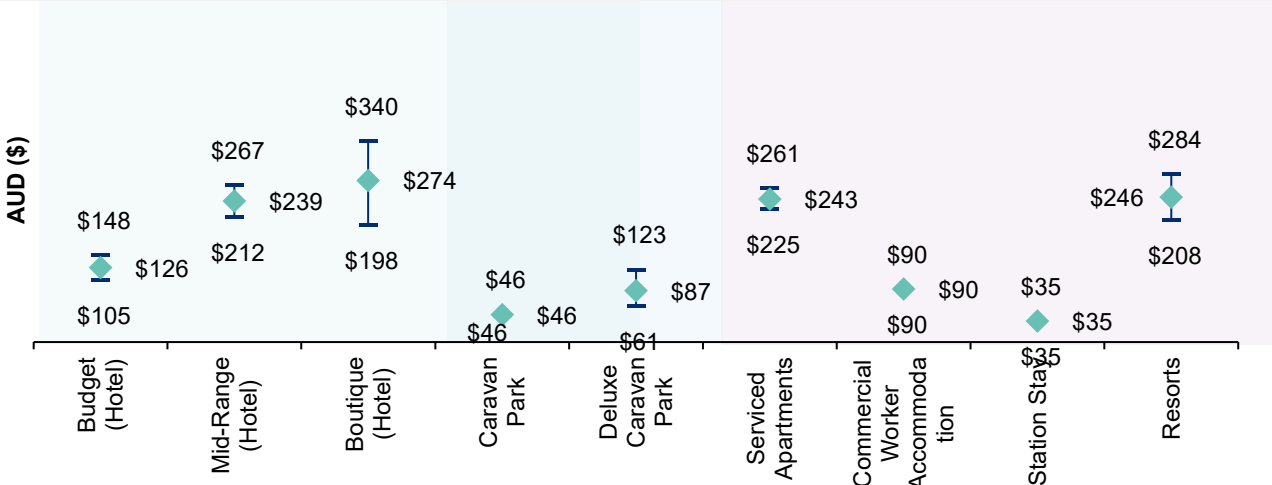
All establishments are generally open throughout the year, with one boutique hotel occasionally closing when the managers take holidays or decide on a temporary shutdown.

Average Occupancy Rates and Rack Rates by Short Stay Categories



Source: Urbis, Accommodation Providers

Average Rack Rates by Short Stay Categories



Source: Urbis, Accommodation Providers

ACCOMMODATION ANALYSIS | CARAVAN AND HOLIDAY PARKS

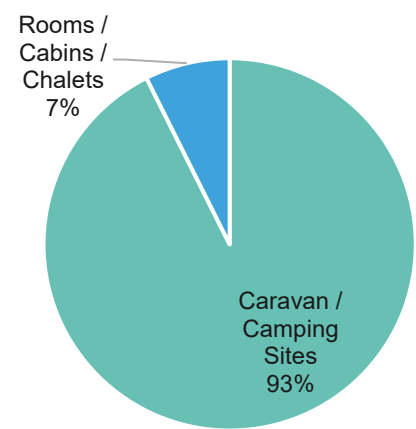
Kalbarri's caravan and holiday parks have higher average rack rates compared to Geraldton, with more significant variation between peak and off-peak seasons.

The audit of four properties in Kalbarri's Urban Centre—Kalbarri Tudor Holiday Park, Tasman Holiday Park – Kalbarri, Kalbarri Anchorage Holiday Park, and Red Bluff Tourist Park—notes a higher proportion of caravan and camping sites relative to rooms, cabins, and chalets, with about a 93% provision for caravan / camping sites, and the remaining 7% as rooms / cabins / chalets.

Across all accommodation types, Kalbarri's rates surpass those of Geraldton, with more pronounced disparities during different seasons, likely reflecting varying occupancy rates. This trend is consistent across both caravan/camping sites and rooms/cabins/chalets. Notably, Red Bluff Tourist Park, the newest addition to the region, opened in 2019 just before the Covid-19 pandemic, offering modern holiday units and ensuite sites.

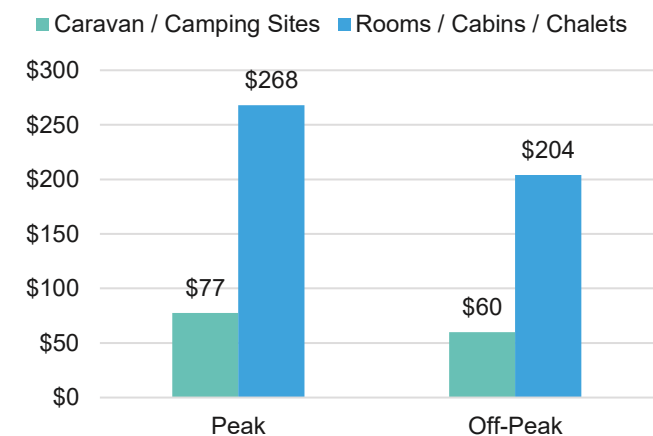
Facilities at these properties typically include swimming pools, playgrounds, and camp kitchens, with Red Bluff Tourist Park also featuring heated spa baths in some of its two-bedroom units.

Proportion of Supply by Type

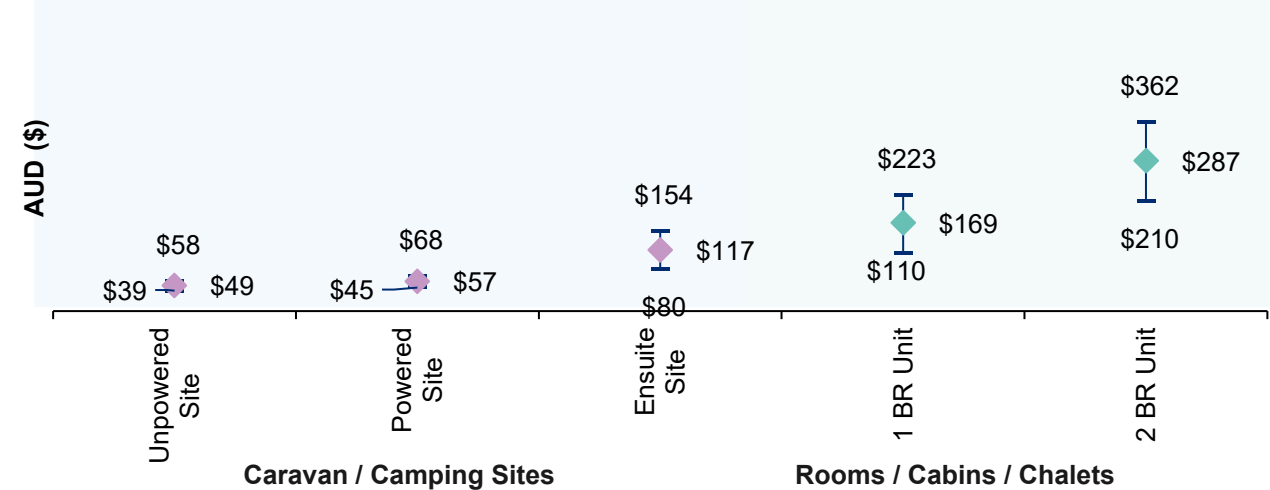


Source: Urbis, Accommodation Providers

Average Rack Rates by Seasonality



Average Rack Rates by Accommodation Type



Source: Urbis, Accommodation Providers

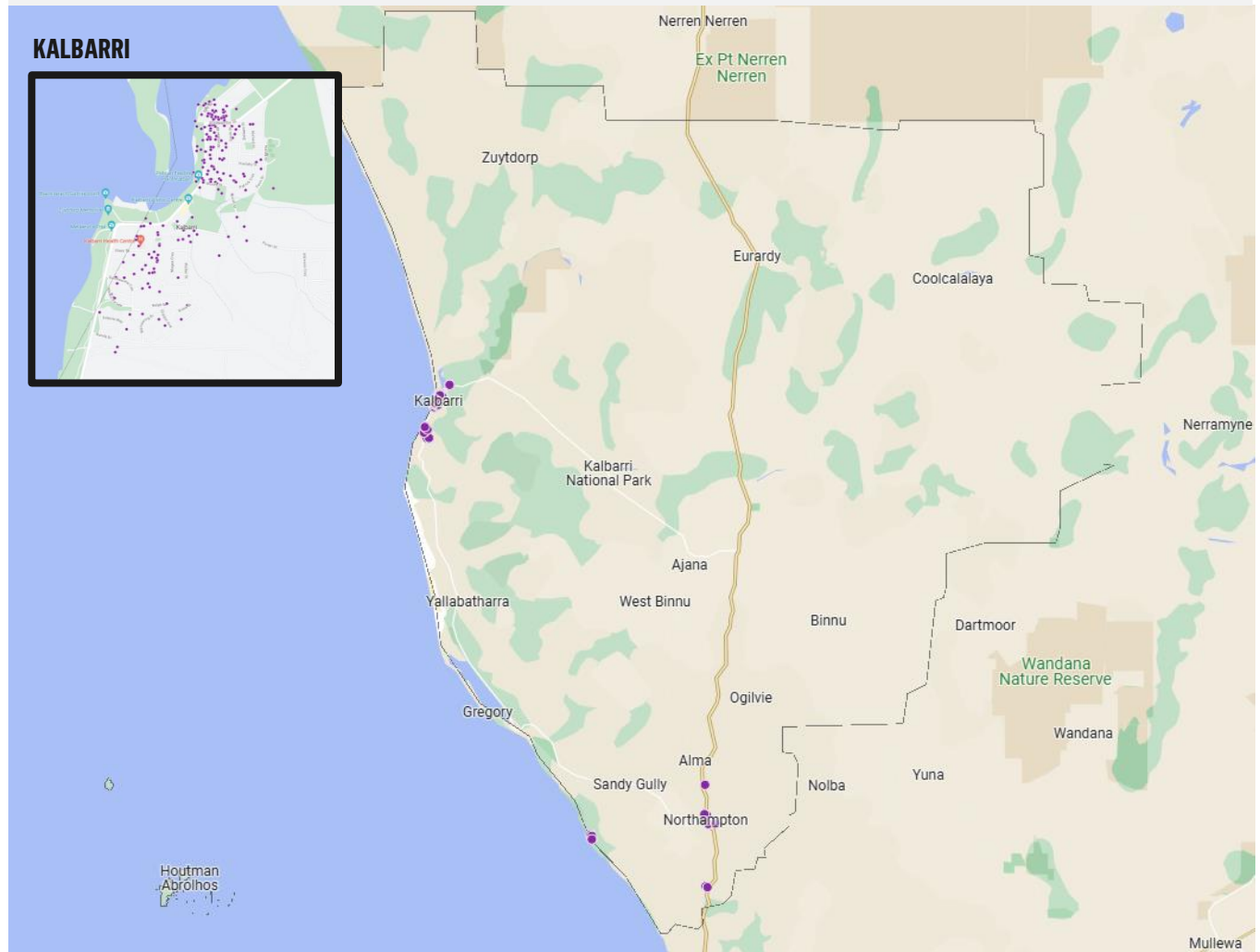
ACCOMMODATION ANALYSIS | SHORT TERM RENTALS

The Northampton region's short term rental market is distributed in clusters, with centre of Kalbarri capturing the majority of listings.

A review of AirDNA research identified the following key attributes and trends.

- **Listing Seasonality:** Across the Kalbarri/Northampton short-stay market, there was a relatively high level of short-term rental listings (ranging 160-197 booked listings in each month of 2024). This provides an important share of the area's short-stay supply.
- **Highly Variable Occupancy Levels:** Occupancy rates in this market are highly seasonal with a third of the year have occupancy levels of under 50%. This is symptomatic of the town's nature as a holiday destination, which makes the WA school holiday months of April, July, September/October and December/January particularly important for demand for holiday rentals in Kalbarri.
- **Cooling Average Daily Rates:** Following a period of elevated rates, particularly during statewide border closures, average daily rates in Kalbarri have begun to cool. This cooling is accompanied by greater variation, characterised by lower rates during off-peak months. The increased elasticity in demand can be attributed to affordable international destinations once again becoming competitive for domestic visitors.

Short Term Rental Properties, Shire of Northampton



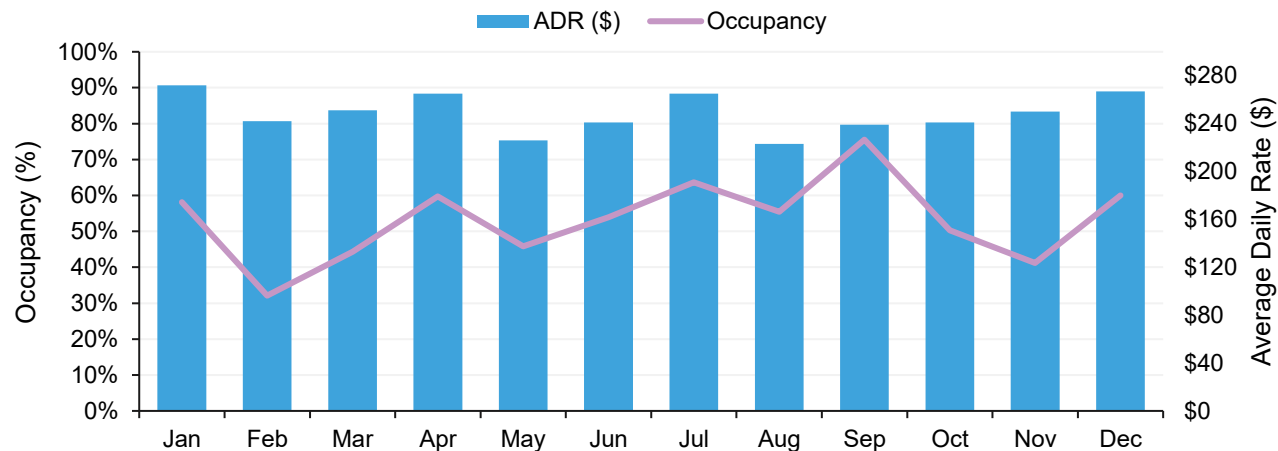
Source: AirDNA

ACCOMMODATION ANALYSIS | KALBARRI-NORTHAMPTON SHORT-TERM RENTAL MARKET

Being a particularly strong family destination, there is a large premium associated with four and five bedroom rentals, when compared to other regions such as Geraldton.

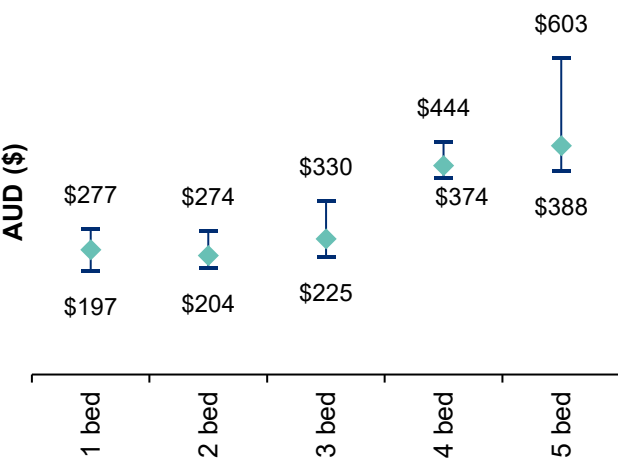
With strong demand from family holidaymakers and limited levels of market supply, this points to a key demographic that should have future supply catered to. Whether it be in the form of low-rise serviced apartments, or holiday parks with villas and chalets – the higher-yielding four and five bedroom market should be considered in these types of developments.

Short-term Rentals, Occupancy & ADR, 2024



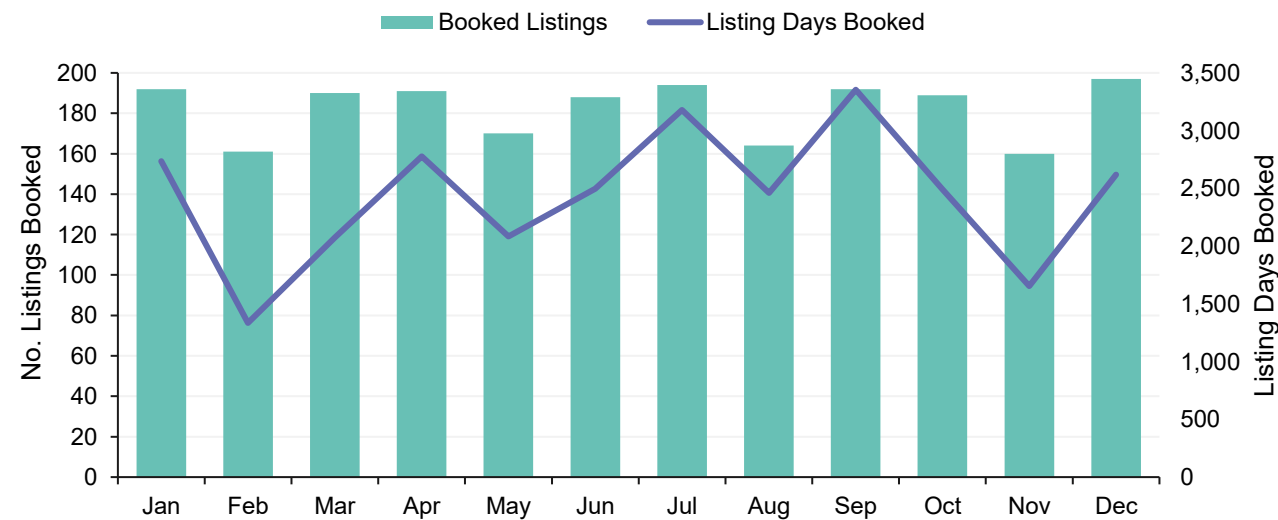
Source: AirDNA
Note: Northampton region as defined by AirDNA (including town of Kalbarri)

Monthly Median ADR Range by Room Type



Source: AirDNA
Note: Northampton region as defined by AirDNA (including town of Kalbarri), 2024
Mid West Tourism Accommodation Study

Short-term Rentals, Listings & Listing Days Booked, 12 Months to November 2024



Source: AirDNA
Note: Northampton region as defined by AirDNA (including town of Kalbarri)

WORKER ACCOMMODATION ANALYSIS

KEY INSIGHTS

1

A tight labour market as elevated vacancy levels in the wider Pilbara, Kimberley and Mid West regions of WA are beginning to stabilise after covid-related peaks.

2

Geraldton's labour force exceeds 20,000, with tourism workers making up 6.7%. High wages in competing sectors create challenges for retaining the 1,074 estimated tourism sector workers.

3

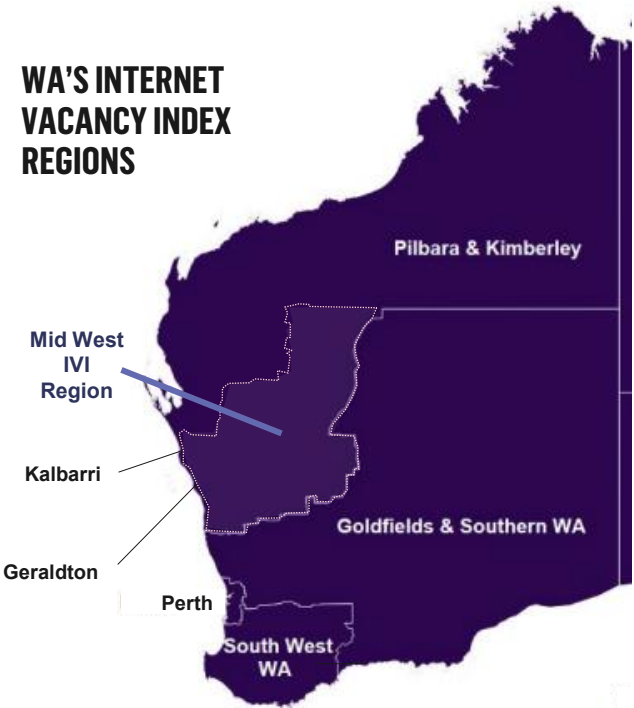
Kalbarri's workforce (1,600-1,800) is heavily tourism-driven. The tourism sector supports approximately 217 workers, with on-site housing crucial for attracting skilled staff.

WORKER ACCOMMODATION ANALYSIS | JOB VACANCIES IN THE WIDER REGION

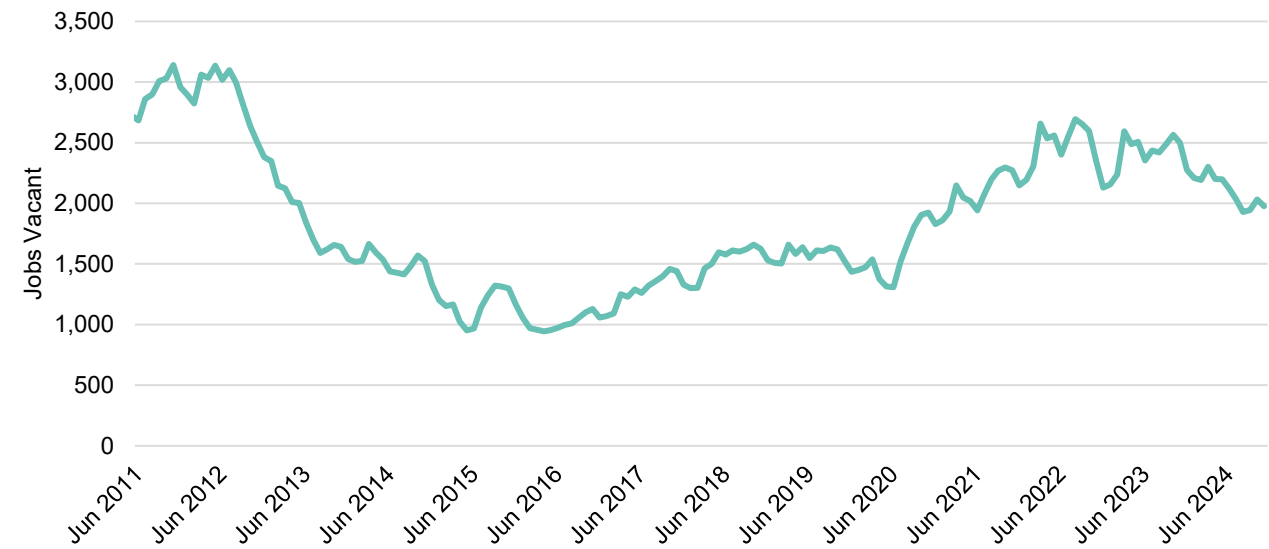
Job vacancies across the Pilbara & Kimberley IVI Region, which also includes the Mid West region, remain high at around 2,000 vacancies in late 2024, despite some moderation.

Vacancies across WA increased during border closures and there were lower levels of permanent and temporary migration through the Covid-19 pandemic. However, record post-pandemic migration has helped reduce vacancies across the region, dipping below 2,000 for the first time since 2021. Downward pressure on inflation and a stabilising economy following the pandemic recovery are likely to see vacancies return to longer-term, non-mining-boom levels of 1,000-2,000 in the medium to long term.

WA'S INTERNET VACANCY INDEX REGIONS



Internet Vacancy Index, Pilbara & Kimberley IVI Region, June 2011 – June 2024



Source: Jobs and Skills Australia

WORKER ACCOMMODATION ANALYSIS | GERALDTON LABOUR MARKET

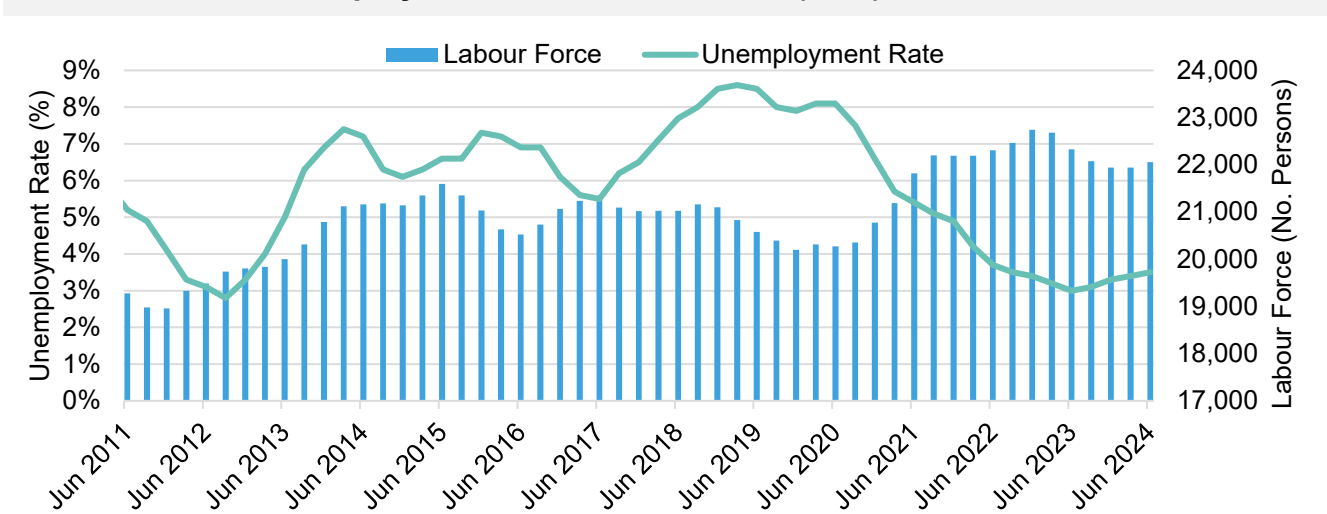
The Geraldton labour force numbers over 20,000 workers as of mid 2020, with tourism-sector workers comprising a relatively minor share of its workforce at approximately 6% of all jobs, as it competes with the city’s more dominant sectors for capital and human resource growth.

Geraldton’s estimated 1,074 tourism jobs however is substantial for the region and represents approximately 61% of all tourism jobs in the Mid West.

This translates into a particularly strong crowding out effect, with the 1,074 tourism workers subject to higher competing wages in the resources sector, creating challenges for employee turnover for accommodation facilities in Geraldton. This underscores the need for developing and operating purpose-built worker accommodation facilities in Geraldton to attract more skilled workers, a strategy that is also relevant for Kalbarri.

Accommodation and Food Services employ 66% of Geraldton’s tourism-supported workforce (711 workers), followed by retail at 16% (172 workers) and transport, postal and warehousing at 5% (55 workers), which comprises scenic and adventurous land, vehicle and boat tours. In contrast, the transport, postal, and warehousing category specifically for the tourism-supported industry in the Shire of Northampton accounts for only 5 workers.

Labour Force & Unemployment, Greater Geraldton (LGA), June 2011 – June 2024



Source: ABS

Top 10 Occupations in Tourism-Aligned Industries, Greater Geraldton (LGA)

 ACCOMMODATION	NO. WORKERS
Housekeepers	55
Receptionists	24
Real Estate Sales Agents	22
Bar Attendants and Baristas	13
Chefs	12
Hotel and Motel Managers	10
Kitchenhands	9
Sales Assistants (General)	9
Caravan Park and Camping Ground Managers	7
Commercial Cleaners	6

 FOOD & BEVERAGE SERVICES	NO. WORKERS
Kitchenhands	187
Sales Assistants (General)	146
Waiters	89
Bar Attendants and Baristas	88
Cafe Workers	81
Fast Food Cooks	65
Chefs	61
Cafe and Restaurant Managers	54
Cooks	43
Retail Managers	38

Source: ABS 2021 Census Place of Work

WORKER ACCOMMODATION ANALYSIS | KALBARRI LABOUR MARKET

Shire of Northampton’s workforce, fluctuating between 1,600 and 1,800, has been elevated for the past four years.

Approximately 217 jobs in the Shire of Northampton are tourism-supported, with an estimated 192 (or 88%) of these jobs in the Accommodation and Food Services and the remainder largely in Retail (3.7%) and transport, postal and warehousing (2.3%), which employs five people locally who work as scenic boat tour operators, national park tour guides and land tour operators.

The Accommodation sector comprised 99 workers as of the 2021 census, with the most prevalent roles as follows:

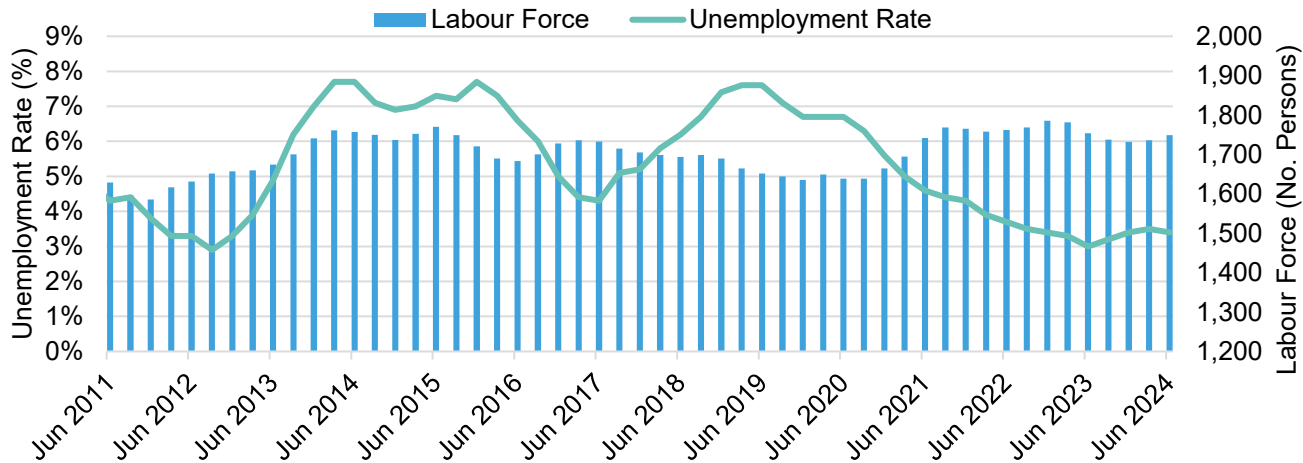
- Caravan Park and Camping Ground Managers (19 employees)
- Housekeepers (17 employees)
- Receptionists (15 employees)

These three occupations comprise 52% of the total accommodation workforce, highlighting the particular importance of caravan park and camp-ground staff in this market. F&B staff are also of notable important in accommodation operation, with 83 workers in this sector.

The need for on-site accommodation is of particular importance for attracting chefs and restaurant managers, where competition to attract new experienced and trained workers from outside the Shire is toughest. The Woods Street key worker accommodation site, offering up to 30 one- and two-bedroom houses, will provide a critical supply boost. Additionally, a temporary overflow caravan site with 15 bays is set to ease pressures in Kalbarri, making it easier to attract and retain skilled professionals in the region.

Source: ABS Census (2021), REMPLAN (2024), Government of Western Australia, Shire of Northampton
Mid West Tourism Accommodation Study

Labour Force & Unemployment, Northampton (LGA), June 2011 – June 2024



Source: ABS

Top 10 Occupations in Tourism-Aligned Industries, Northampton (LGA)

ACCOMMODATION	NO. WORKERS	FOOD & BEVERAGE SERVICES	NO. WORKERS
Caravan Park and Camping Ground Managers	19	Chefs	13
Housekeepers	17	Cafe and Restaurant Managers	13
Receptionists	15	Bar Attendants and Baristas	12
Commercial Cleaners	8	Kitchenhands	10
Other Accommodation and Hospitality Managers	7	Waiters	7
Waiters	4	Hotel and Motel Managers	6
Inadequately described	4	Retail Managers	6
Chefs	3	Cafe Workers	4
Handypersons	3	Receptionists	3
Caretakers	3	Fast Food Cooks	3

Source: ABS 2021 Census Place of Work

04

OPPORTUNITY AND DEMAND ANALYSIS

KEY INSIGHTS

1

A common challenge in both Geraldton and Kalbarri is **securing and retaining permanent staff**, which is compounded by the lack of accommodation for tourism workers.

2

Geraldton has the potential to further **enhance its tourism identity**, while Kalbarri could benefit from introducing **a new major attraction to extend its peak periods**.

3

Our analysis of visitor data, accommodation audits, stakeholder discussions, and case studies indicates that **Geraldton would benefit from a branded upscale hotel or serviced apartment**. In contrast, Kalbarri shows **potential for a larger scale resort or caravan park with family-friendly facilities**.

4

Accommodation demand is uplifting in both regions. By 2034, Geraldton is forecast to need an extra 130 to 191 hotel rooms compared to 2024 levels. Kalbarri is expected to require 83 to 122 more hotel rooms and 74 to 108 additional caravan park sites.

OPPORTUNITY AND DEMAND ANALYSIS | STAKEHOLDER ENGAGEMENT SUMMARY

APPROACH

A range of tourism market stakeholders were engaged to better understand the nuances of the Geraldton and Kalbarri tourism market. This includes the following groups.

- Local Governments
- Aboriginal Corporations
- Tour operators; and
- Accommodation providers.

Key commentary for both regions are summarised to the right. Details of the stakeholder engagement meetings are appended to this report.

KEY FINDINGS

- Geraldton and Kalbarri are often seen as stopover destinations on the way to major destinations like Monkey Mia, Exmouth and Coral Bay. However, they are increasingly benefiting from international bus tours, particularly driven by the Chinese market eager to visit the Pink Lake, thanks to social media exposure.
- The short-stay accommodation market presents a contrasting picture between Geraldton and Kalbarri. In Geraldton, worker and corporate stays have boosted short-stay demand, leading to a higher overall average occupancy rate despite its transient tourism market. Conversely, Kalbarri is more tourism-focused, experiencing pronounced peak and off-peak seasons, leading to a lower overall average occupancy rate. Despite these differences, both markets have successfully maintained relatively stable room rates, even during off-peak periods.
- A common challenge in both regions is securing permanent staff, compounded by the lack of accommodation for tourism workers. While casual staff are available, they often result in higher turnover costs, which add to the already significant expenses of operating and maintaining the property.



	INSIGHTS AND MARKET UNDERSTANDING	CHALLENGES AND CONSTRAINTS
TOURISM ATTRACTIONS	The largest international market currently consists of Chinese visitors Kalbarri offers unique experiences not found elsewhere in WA	Geraldton lacks a stronger tourism identity Despite unique experiences, Kalbarri lacks enough attractions to encourage longer stay
SHORT STAY OFFERING & COMPETITION	Some short-stay offerings are outdated and below standard Providers maintain a tight supply-demand balance in Geraldton, driven by worker demand, keeping overall occupancy stable Despite occupancy swings, room rates in Kalbarri remain largely stable, even during off-peak periods	High construction costs hinder upgrades Long wait times for tradespeople delay renovations The large Airbnb market, especially in Kalbarri, poses significant competition
SHORT STAY DEMAND	High numbers of workers boost demand in Geraldton's short-stay market, while tourism is largely transient Kalbarri is more tourism-focused with more pronounced peak and off-peak seasons, affecting overall occupancy	Inadequate accommodation supply or standards likely cause economic leakage, diverting tours out of the region There is a need for more products that are better catered for the international market (e.g branding, bedding provision)
SHORT STAY OPERATIONS & STAFFING	One or two staff members, usually the general manager, receive on-site accommodation Some casual staff stay in caravan parks The 88-day regional visa creates high turnover	Attracting and retaining quality staff is difficult Lack of accommodation for staff contributes to staffing shortages Prevalent antisocial behaviour in Geraldton may deter workers from moving to the area.

OPPORTUNITY AND DEMAND ANALYSIS | GERALDTON STAKEHOLDER ENGAGEMENT SUMMARY

One-on-one meetings and focus group meetings with accommodation providers, tour operators, Yamatji Southern Regional Corporation, DevelopmentWA, and the City of Greater Geraldton were held from January to March 2025. Below are the most common themes heard across the meetings.

OCCUPANCY AND VISITATION TRENDS

- **High Occupancy Rates:** Properties report occupancy rates between 70% and 100%, driven by corporate stays, mining workers, and seasonal leisure visitors.
- **Seasonal Variations:** Occupancy peaks during the wildflower season and Christmas, with quieter periods from January to March
- **Visitor Demographics:** A mix of corporate clients, contractors, and leisure tourists, with a noticeable demand for longer stays (4-5 nights) and a significant presence of Chinese visitors.

MARKET DRIVERS AND CHALLENGES

- **Corporate and Mining Influence:** Corporate travel and the mining industry are significant market drivers, currently helping to maintain a tight supply and demand balance. However, this also results in a boom-and-bust cycle for the accommodation market, which reached a peak last year.
- **Tourism Identity:** Geraldton lacks a strong tourism identity, often serving as a stopover rather than a standalone destination, and therefore the tourism market is a lot more transient.

STAFFING AND OPERATIONAL ISSUES

- **Staffing Challenges:** High turnover and difficulty in attracting and retaining quality staff, especially chefs and permanent employees, lead to reliance on casual backpackers for quick staffing solutions.
- **Accommodation Shortages:** Limited staff accommodation availability makes it difficult to house new employees. The use of housing for Airbnb properties has also exacerbated this issue
- **Operational Costs:** High operational and running costs, with annual renovations required for older properties. Construction costs and long wait times for work commencement are also challenges.
- **Antisocial Behaviours:** Instances of antisocial and violent behaviour in the area have made potential staff hesitant to work and stay. Nonetheless, the Geraldton Police's increased and ongoing patrols have been acknowledged in reducing these incidents.

MARKETING AND TRADE SHOWS

- **Trade Show Participation:** Continuous participation in numerous trade shows, including international events would help, with an identified need for increased government spending and regional representation to boost the region's tourism identity.
- **Local Support:** Enhanced collaboration between local councils and statutory authorities, with increased state government investment in trade shows could provide necessary support to grow Geraldton's tourism branding within the broader Coral Coast region.

TOURISM AND ECONOMIC IMPACT

- **Events and Activities:** Seasonal events and activities significantly impact the local economy by attracting visitors. However, the availability of accommodation affects the ability to host large events and retain visitors, impacting local businesses and services.
- **Economic Leakage:** The lack of adequate accommodation can lead to economic leakage, where potential visitors choose other destinations, resulting in lost revenue for the region.

COMMUNITY AND GOVERNANCE

- **Local Government Initiatives:** The City of Greater Geraldton is prioritising housing development. There is also proactive outreach to developers to remove barriers to development.
- **Regulatory Framework:** There is an ongoing review of local planning policies to reduce red tape.
- **Infrastructure Challenges:** Ageing infrastructure and the cost of headworks are significant barriers to development. It is known that the City is however exploring funding opportunities to support infrastructure development.

COLLABORATION AND COORDINATION

- **Improved Coordination:** There is a need for better coordination among tourism groups, organisations, and visitor centres to address accommodation issues, streamline efforts and improve the overall visitor experience.
- **Shared Goals:** Workshops and collaborative meetings demonstrate a shared goal among stakeholders to improve the tourism sector, highlighting the importance of continued engagement and cooperation.

OPPORTUNITY AND DEMAND ANALYSIS | MODELLING SHORT STAY ACCOMMODATION ANALYSIS

Two scenarios were developed to test the levels of growth required in the number of hotel, resort and motel rooms if base and elevated visitation growth are to materialise. This allowed a range of variables to be considered, such as propensity to choose accommodation typologies, occupancy levels and expected guests per booked room with sensitivity testing at various levels of demand growth.

The base room demand scenario assumes that base-case visitor night growth be achieved, whereas the elevated-case demand scenario assumes the elevated level of visitor night growth will materialise.

The elevated scenario presumes that the ambitious TRA forecasts will be achieved and maintained over the long term. Conversely, the lower-growth base case is deemed more probable, as it encounters fewer constraints and presents a more feasible pathway for attaining this level of visitors and guests.

These forecasts should be viewed as potential scenarios given that there are a number of factors that will influence these outcomes, including destination marketing, tourism services quality and expansion, amenities and – ultimately – more accommodation choice.

Demand Modelling Assumptions		
PARAMETER	NO. (%)	NOTE
Sustainable Occupancy Rate	80%	Review of maintainable STR occupancy rates that hotels can sustainably operate under before inducing new supply requirement.
Average Number Guests per room	1.8	Assumed to fluctuate between 1.5 to 2.1 guests per room, stabilising at 1.8 guests in line with historic ABS STA range.
Visitor Night Hotel, Motel & Resort Propensity	14.25%	Proportion hotel and similar accommodation of total visitor nights in the Mid West region of WA.

Source: Urbis, Tourism Research Australia; STR Global; ABS

Sensitivity Testing Scenarios as Proportion of Visitor Nights Growth Forecast	
Base Demand Scenario as % of Growth Forecast	50%
Elevated Demand Scenario as % of Growth Forecast	100%

OPPORTUNITY AND DEMAND ANALYSIS | GERALDTON DEMAND FORECAST

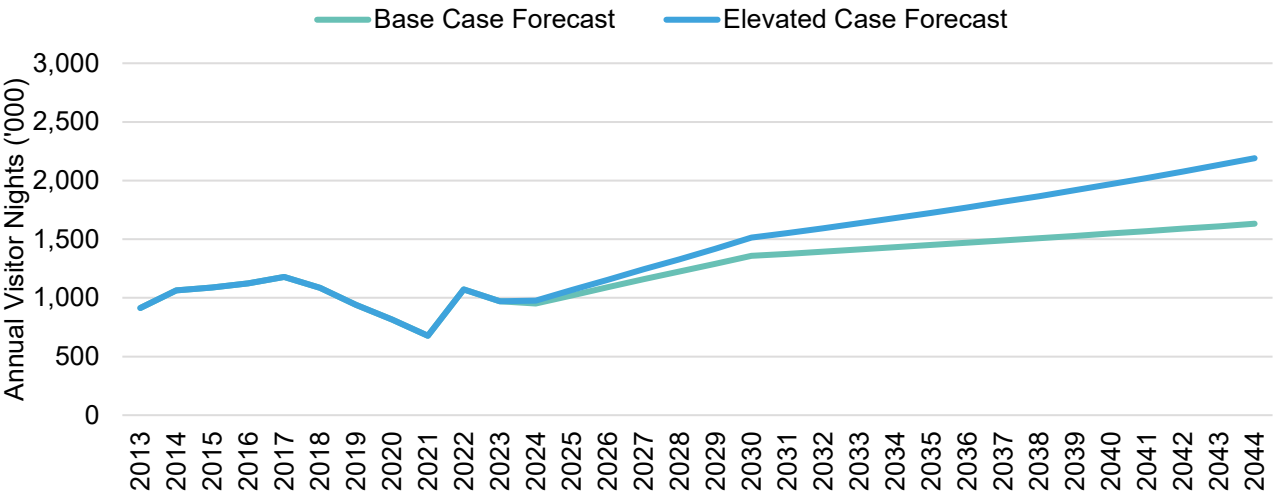
To support this level of visitor demand, there will be a requirement of an additional 130 to 191 rooms in hotel, resort and motels in 2034 on top of 2024 levels.

Geraldton is forecast to grow its annual visitor nights from 971,000 in 2023 to 1,431,000 to 1,680,000 by 2034.

A strong pipeline of energy and minerals projects in the wider region is expected to boost business and employment-related travel, driving future growth in visitor nights in Geraldton.

It should also be noted that the forecasted growth is dependent on preceding expansions in short-stay supply to unlock the required additional capacity critical to supporting visitor night growth in Geraldton. Failing to achieve development feasibility for new and expanded hotel developments will result in weaker growth than demand-side indicators would otherwise forecast.

Historic and Forecast Visitor Nights in Geraldton, 2013 - 2044



Source: Urbis, Tourism Research Australia
Note: Geraldton refers to City of Greater Geraldton region. Base Case Forecast has visitor growth at 50% of derived visitor night growth forecast. Elevated Case Forecast has visitor growth at 100% of derived visitor night growth forecast.

Room Demand in Geraldton for Hotels, Resorts & Motels, 2013 - 2044

ROOM DEMAND	2024	2029	2034	2039	2044
Base Case Room Demand	206	280	310	331	354
Elevated Case Room Demand	211	308	364	416	475
Rooms required to support demand at Base Demand Level	258	350	388	414	442
Rooms required to support demand at Elevated Demand Level	264	385	455	520	594

Source: Urbis; Tourism Research Australia; ABS
1Note: Geraldton refers to City of Greater Geraldton region. Assumes a maximum sustainable occupancy rate of 80% for serviced short-stay properties. The total number of rooms will hence need to be 25% higher than the level of demand to support sustainable operation for the forecast number of guests.



BUNDABERG
BRISBANE

BUNDABERG QUEENSLAND

As the tenth largest city in Queensland, Bundaberg has a comparable backdrop to Geraldton, however despite its strong agrarian character with an economy largely focused on sugar cane and fruit exports has also managed to nurture a thriving tourism sector concurrently. The iconic Bundaberg Rum distillery serves as a major visitor drawcard, which is an attraction that Geraldton lacks, creating challenges in substantially drawing in larger non-business visitor growth.

2023 SNAPSHOT	BUNDABERG (BUNDABERG REGIONAL COUNCIL)	GERALDTON (CITY OF GREATER GERALDTON)
Population	104,166 ↑ 11% from 2013	41,194 ↑ 5.2% from 2013
Total Annual Visitor Nights	2.92m	0.97m
Domestic Visitor Nights	78% of overall nights are domestic	71% of overall nights are domestic
Domestic Spending	\$353	\$265

Source: ABS, TRA



BUNDABERG RUM DISTILLERY

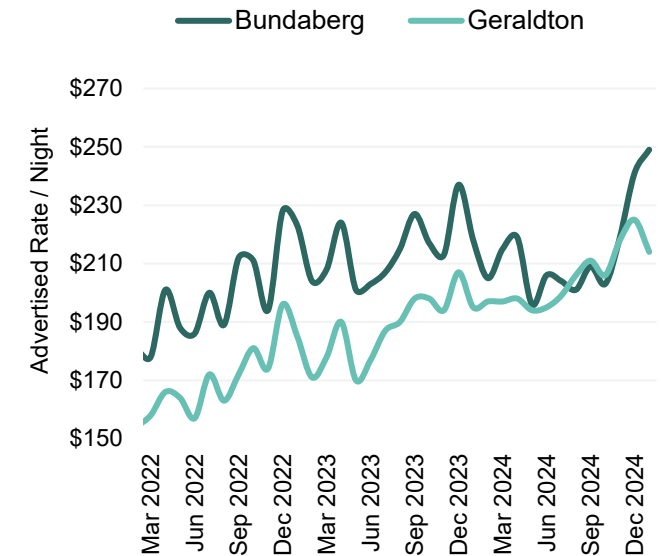


BUNDABERG CITY HERITAGE TREASURES



LADY ELLIOT ISLAND

AVERAGE DAILY RATE, SHORT STAY RENTALS



Source: AirDNA

SUCCESS FACTORS



Nationally recognised 'brand name': Bundaberg has a distinct tourism identity, with its name closely linked to renowned liquor products, additionally supported by the presence of the Bundaberg Rum Distillery as a key drawcard.



Rich and ever-present historical character: Bundaberg's rich history, from its Indigenous heritage to its colonial past, is well-preserved and celebrated through historical trails, heritage buildings and events.



Gateway to Natural Attractions: Day trips and tours to the nearby islands in the Great Barrier Reef are well-promoted, encouraging longer stays and adding diversity to the tourism attractions.



PULLMAN RESORT BUNKER BAY BUSSELTON



150 luxury one-, two- and three-bedroom villas



Pullman re-branded property in September 2012



The Pullman brand has 145 hotels around the world, owned by one of the world's largest hotel operators, Accor. When the Quay West Resort Bunker Bay was rebranded to the Pullman in late September 2012, it became the first in Western Australia to carry the premium five-star brand. The additional recognition gained by the Busselton-Margaret River region, coinciding with both domestic and international visitor night growth for the area, signals strong up-side potential for regions such as Geraldton, that are missing widely-known hotel and resort brands.

HILTON GARDEN INN BUSSELTON



110 rooms, opened in December 2023

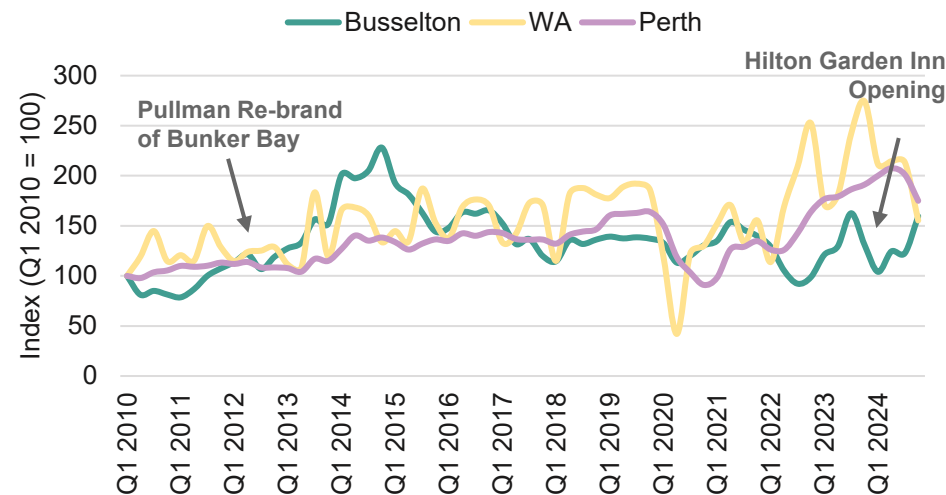


WA's second Hilton Garden Inn branded hotel



The 110-room Hilton Garden Inn opened at the end of December 2023, bringing a widely known hotel brand to the centre of Busselton's tourism offer, parallel the jetty, foreshore and visitor centre. Three months later, in March 2024, Jetstar added an additional direct flight between Sydney and Busselton bringing the total direct weekly flights between it and Sydney to three, expanding transport capacity from pent-up demand that was now at least partially serviceable by the new world-class short-stay supply. International visitor nights in the 12 months to September 2024 increased 91% (or 41,000) from the prior 12-month period, assisted by this growth in high-quality internationally recognised supply.

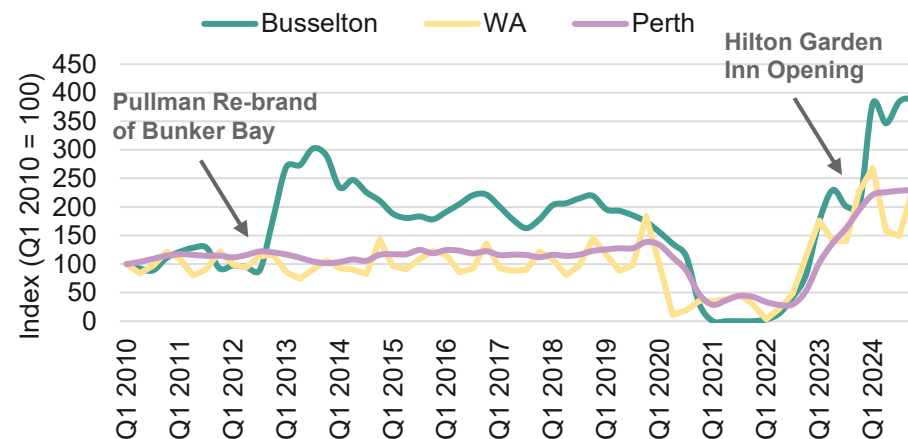
DOMESTIC VISITOR NIGHT INDEX, HOTELS & SIMILAR ACCOMMODATION, 12-MONTHS TO QTR.



Source: TRA

Comprised of Busselton - East, Busselton - West and Busselton Surrounds SA2s

INTERNATIONAL VISITOR NIGHT INDEX, HOTELS & SIMILAR ACCOMMODATION, 12-MONTHS TO QTR.



Source: TRA Note: International data collection during 2020-22 was impacted by covid-19 and should be disregarded.

Comprised of Busselton - East, Busselton - West and Busselton Surrounds SA2s

OPPORTUNITY AND DEMAND ANALYSIS | GERALDTON DEVELOPMENT OPPORTUNITIES

Key success factors and short-stay accommodation barriers in Geraldton are summarised below. This summary informs the accommodation opportunities listed on the next page and guides site options and future concept designs for preferred locations.

KEY SUCCESS FACTORS FOR FUTURE ACCOMMODATION PROVIDERS TO LEVERAGE

-  Features an airport, serving as a key gateway and regional centre for the Mid West
-  Attracts a diverse visitor base, including corporate travelers
-  Close to popular tourist destinations for the International market like the Hutt Lagoon Pink Lake
-  International hotel brands have already established an initial presence

KEY BARRIERS / ISSUES AND MITIGATING MEASURES

BARRIER / ISSUE	CAUSE	MITIGATING MEASURES
Geraldton's 'stopover' identity	Lack of destinational identity for Geraldton	- Greater Investment in tourism infrastructure and offerings, including in events and gourmet experiences - Enhance branding and marketing efforts to highlight Geraldton's diverse offerings
Cost of development	- Inflation - Labour constraints	- De-risk sites for potential developers prior to going to market - Offer tax and/or development incentives and streamline regulatory processes. This may require further assessment, but potential measures could include fee waivers for new developments, rate exemptions, and differential rates for specific organisations. Other arrangements explored by other councils include capital contributions from Treasury Corporation and peppercorn lease deals.
Stagnation in potential revenue growth	An unwritten rule keeps room rates largely unchanged over the year, fostering complacency.	- Focus on quality and ensure more accommodation options meet international standards - Educate providers on revenue management for more dynamic room pricing. By adjusting pricing in real time based on current market conditions, demand fluctuations, and competitor pricing, this allows that prices reflect the true value of services, and also helping to maximise revenue. In essence, dynamic room pricing could be adopted as a strategic tool that aligns supply with demand, ensuring businesses remain agile and responsive in a constantly changing market.
Attracting and retaining staff	Lack and cost of housing	- Provide worker accommodation within the development for staff - Explore temporary housing solutions for workers and affordable housing options

OPPORTUNITY AND DEMAND ANALYSIS | GERALDTON DEVELOPMENT OPPORTUNITIES (CONT.)

Synthesising accommodation analysis for Geraldton and stakeholder engagement findings reveal that the highest accommodation opportunities lie in upscale hotels and serviced apartments. Currently, there is no provision for luxury and deluxe hotels in Geraldton, supported by a generally lower market capacity due to a visitation market primarily composed of workers. While a caravan park is a moderate priority given limited gaps presented in existing supply, there is a preference for quality offerings, indicating potential for deluxe caravan parks rather than standard ones.

Assessment of Accommodation Opportunities



Traffic light assessment: green indicates high opportunity, yellow indicates moderate opportunity, and red indicates low opportunity.

Alignment of Accommodation Opportunities

1

ACCOMMODATION TYPES

- Upscale hotel – high priority
- Serviced apartments – high priority
- Mid level hotel – moderate priority
- Deluxe holiday – moderate priority
- Budget – low priority
- Include on-site worker accommodation

2

ACCOMMODATION LOCATION

- Town centre locations for upscale and serviced apartments, in front or near to the foreshore for views and / or proximity to the beach
- Proximity to attractions like the HMAS Sydney II Memorial and the Museum of Geraldton, along with diverse food options, enhance competitiveness and provide flexibility to increase room rates.

3

ACCOMMODATION ATTRIBUTES

- National and international branded accommodation can act as a 'rate setter' and support higher rack rates for the overall region.
- Facilities, such as a swimming pool, for a larger development
- Conference, function and restaurant facilities to accommodate corporate events / weddings, noting the lack of large conference / function facilities in Geraldton.

4

ACCOMMODATION SCALE

- Ability to accommodate large tour groups – 30+ people
- At least 75 – 100 rooms to achieve economies of scale amid high construction costs environment
- Respond to the unique characteristics of each site and the landscape to determine appropriate scale and height

OPPORTUNITY AND DEMAND ANALYSIS | KALBARRI STAKEHOLDER ENGAGEMENT SUMMARY

One-on-one meetings and focus group meetings with accommodation providers, tour operators, and the Shire of Northampton were held from January to March 2025. Below are the most common themes heard across the meetings.

OCCUPANCY AND VISITATION TRENDS

- **Peak Seasons:** Kalbarri experiences a high influx of visitors during Christmas, Easter, and from July to October, driven by favourable weather and holiday periods, with occupancy rates reaching 70% to 80%. Demand mostly driven from multi-generational families and grey nomads.
- **Off-Peak Challenges:** During the off-peak seasons (November to February), visitor numbers significantly decline, reducing average occupancy to around 30%. Discounts on room rates have limited impact, so most providers prefer to maintain their rates rather than significantly lowering them. There is a need for more events and attractions to draw visitors year-round and potentially extend the peak season.



ACCOMMODATION AND INFRASTRUCTURE

- **Options:** Kalbarri offers a range of accommodation options, including caravan parks, but faces significant seasonal swings in occupancy.
- **Quality and Standard:** The quality of short stay accommodation is often poor and outdated, especially compared to international standards valued by visitors from the Chinese market. In addition, strata-titled ownership within the same complex often results in inconsistent amenities from one unit to another.
- **Reliability:** There have been several recorded instances where guests booked short-stay rentals that were found to be non-operational upon arrival, which may lead to inconvenience and disappointment.
- **Staff Accommodation:** Similar to the situation in Geraldton, the lack of dedicated staff accommodation in Kalbarri contributes to staffing shortages and high turnover.



COLLABORATION AND COORDINATION

- **Improved Coordination:** Better coordination among tourism groups, organisations, and visitor centres is needed to address accommodation issues and improve the overall visitor experience.
- **Shared Goals:** Continued engagement and collaboration among stakeholders are essential for addressing challenges and ensuring aligned and effective efforts.



VISITATION DRAWCARDS

- **Attractions:** Kalbarri National Park, Z Bend, Kalbarri Skywalk are key tourist draws, offering unique experiences not found elsewhere in WA.
- **The Need for More:** There are opportunities to develop gourmet experiences, luxury accommodation, and larger attractions to enhance the visitor experience. Currently, limited activities outside of tours may deter longer stays. Without further investment, Kalbarri risks stagnation.
- **Major Projects:** The major hydrogen project could boost infrastructure, support the town's growth, and enhance its socioeconomic status. These improvements can make Kalbarri more attractive to tourists, strengthening its tourism identity through strategic planning while ensuring the project complements rather than overshadows the town's identity.



IMPACT OF NATURAL DISASTERS AND COVID-19

- **Cyclone Impact:** Cyclone Seroja caused substantial damage to tourism properties and infrastructure, including stormwater issues, hindering recovery and affecting visitor confidence. However, significant efforts have been made since to revitalise the area.
- **COVID-19:** The pandemic, although at a more minimal level due to the predominance of domestic visitors to the area, also highlighted the vulnerability of the local tourism industry.
- **Tourism Dependency:** The natural disasters highlighted that the local economy heavily relies on tourism and hospitality, necessitating growth in these sectors to sustain local businesses and provide job opportunities.



COMMUNITY AND GOVERNANCE

- **Community Reliance:** The community is tightly knit and heavily reliant on each other, particularly in the hospitality sector.
- **Potential Community Resistance:** There may be potential community resistance to new tourism businesses, particularly among the older population. However, there is a recognition that Kalbarri cannot solely be a retirement town. To thrive, it must attract a younger, productive population.
- **Local Government Support:** There is a need for more cohesive efforts and a unified vision for development, which could be achieved through the Local Government continuing to provide leadership in worker accommodation and site developments.



OPPORTUNITY AND DEMAND ANALYSIS | SHORT STAY ACCOMMODATION MODELLING

Two scenarios were developed to test the levels of growth required in the number of hotel, resort and motel rooms as well as caravan park sites/units if base and elevated visitation growth are to materialise. This allowed a range of variables to be considered, such as propensity to choose accommodation typologies, occupancy levels and expected guests per booked room with sensitivity testing at various levels of demand growth.

The base room demand scenario assumes that base-case visitor night growth be achieved, whereas the elevated-case demand scenario assumes the elevated level of visitor night growth will materialise.

The elevated scenario presumes that the ambitious TRA forecasts will be achieved and maintained over the long term. Conversely, the lower-growth base case is deemed more probable, as it encounters fewer constraints and presents a more feasible pathway for attaining this level of visitors and guests.

As noted above, these forecasts should be viewed as potential scenarios.

Demand Modelling Assumptions		
PARAMETER	NO. (%)	NOTE
Sustainable Occupancy Rate	80%	Review of maintainable STR occupancy rates that hotels can sustainably operate under before inducing new supply requirement.
Average Guests per Room (Hotels and Similar)	1.8	Assumed to fluctuate between 1.5 to 2.1 guests per room, stabilising at 1.8 guests in line with historic ABS STA range.
Average Guests per Site (Caravan Parks)	2.24	In-line with estimated average guests per caravan and commercial camping ground site in WA for the 10-years-to-2024
Visitor Night Hotel, Motel & Resort Propensity	14.25%	Proportion hotel and similar accommodation of total visitor nights in the Mid West region of WA.
Visitor Night Caravan Parks & Commercial Camping Propensity	15.77%	Proportion Caravan Parks & Commercial Camping of total visitor nights in the Mid West region of WA.

Source: Urbis, Tourism Research Australia; STR Global; ABS

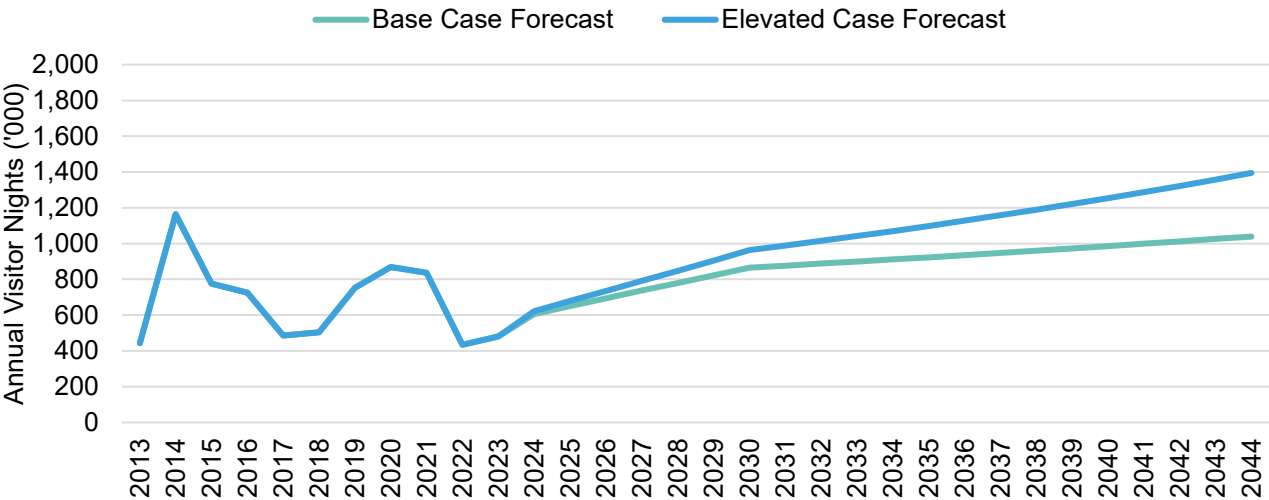
Sensitivity Testing Scenarios as Proportion of Visitor Nights Growth Forecast	
Base Demand Scenario as % of Growth Forecast	50%
Elevated Demand Scenario as % of Growth Forecast	100%

OPPORTUNITY AND DEMAND ANALYSIS | KALBARRI DEMAND FORECAST

Kalbarri is forecast to grow its annual visitor nights from 481,000 in 2023 to 911,000 to 1,070,000 by 2034.

To support this level of visitor demand, there will be a requirement of an additional 83 to 122 rooms in hotel, resort and motels in 2034 from 2024 levels as well as an additional 74 to 108 caravan park sites.

Historic and Forecast Visitor Nights in the Shire of Northampton, 2013 - 2044



Source: Urbis, Tourism Research Australia
Note: Base Case Forecast has visitor growth at 50% of derived visitor night growth forecast. Elevated Case Forecast has visitor growth at 100% of derived visitor night growth forecast.

Room Demand in the Shire of Northampton 2014 - 2044

ROOM DEMAND	HOTELS, MOTELS & RESORTS					CARAVAN PARKS & COMMERCIAL CAMPING				
	2024	2029	2034	2039	2044	2024	2029	2034	2039	2044
Base Case Room Demand	131	178	198	211	225	117	158	176	188	200
Elevated Case Room Demand	135	196	232	265	302	120	174	206	235	269
Rooms required to support demand at Base Demand Level	164	223	247	264	282	146	198	220	234	250
Rooms required to support demand at Elevated Demand Level	168	245	290	331	378	150	218	258	294	336

Source: Urbis; Tourism Research Australia; ABS
Note: Assumes a maximum sustainable occupancy rate of 80% for serviced short-stay properties. The total number of rooms will hence need to be 25% higher than the level of demand to support sustainable operation for the forecast number of guests.



YEPPOON QUEENSLAND

Queensland’s small tropical destination of Yeppoon, like Kalbarri, is a relatively small town over six hours north of its state capital, known for its natural beauty. Yeppoon is under two hours from Gladstone and less than an hour from Rockhampton, two larger industrial cities that, like Geraldton, serve as gateways to their northern visitor getaway. Recent investment into a high-end resort-style pool open to the public has become a new drawcard for visitors, taking advantage of the area’s climate.

2023 SNAPSHOT	YEPPOON (YEPPOON SA2, CAPRICORN COAST)	KALBARRI (SHIRE OF NORTHAMPTON)
Population	7,485 ¹ ↑ 9.8% from 2018	3,369 ↑ 2.8% from 2018
Total Annual Visitor Nights	644,000	489,000
Domestic Visitor Nights	89% of overall nights are domestic	88% of overall nights are domestic
Holiday Reason for Visitation	55% of overall nights are for holidays	84% of overall nights are for holidays

Source: TRA

¹Population of Yeppoon (Suburb and Locality) geography



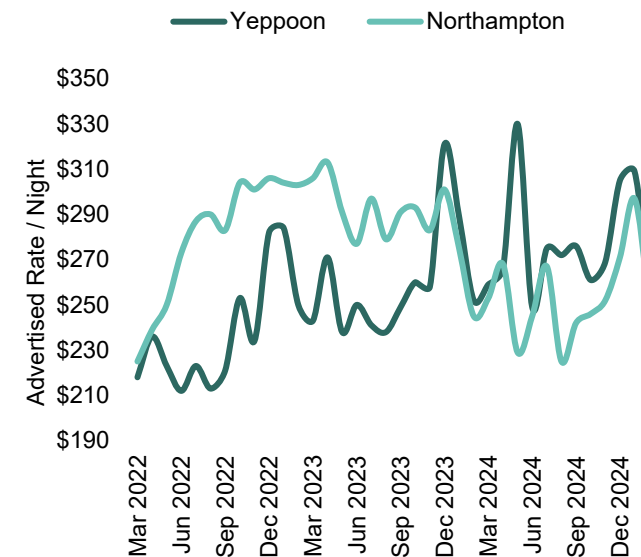
YEPPOON LAGOON



YEPPOON LAGOON



AVERAGE DAILY RATE, SHORT STAY RENTALS



Source: AirDNA

SUCCESS FACTORS



Unique experience: The distinct offerings of Yeppoon, including its coastal scenery and local culture, play a key role in attracting tourists to the region.



Leverages proximity to larger residential city: The proximity to Gladstone is a key success factor for tourism in Yeppoon, as it provides easy access for visitors from the city center, enhancing its appeal as a convenient and attractive getaway.



Recent investment in a high-end resort-style pool: A new public resort-style pool in Yeppoon is attracting more visitors by taking advantage of the area's pleasant climate.



RAC CERVANTES HOLIDAY PARK CERVANTES



**187 villas, studios,
powered / unpowered
sites**



**Underwent a
redevelopment and
expansion in 2016**

RAC expanded the Cervantes Holiday Park in response to feedback from members and guests seeking newer, family-friendly facilities. Completed in December 2016, the redevelopment focused on improving common facilities, included a new 80-person camp kitchen, a recreation and reading room, a resort-style pool with disabled access, and 11 new tourist cabins. Located two hours north of Perth, near the beach and Pinnacles Desert, the park offers various accommodation options such as villas, studios, and powered sites. Additional amenities include a heated swimming pool, BBQs, a kids' activity area, and Seashells Café, with pet-friendly sites available. This expansion enhances the region by attracting more visitors and supporting local businesses.

RAC MONKEY MIA DOLPHIN RESORT MONKEY MIA



**310 villas, studios,
powered / unpowered
sites**



**Underwent a
redevelopment and
expansion in 2018**

The RAC Monkey Mia Dolphin Resort expanded substantially to meet the growing demand for tourism in the region. The redevelopment has expanded the previously small property from four hectares to nine, added 12 new family beach villas, 117 more powered campsites, an additional 14 powered sites with ensuites and 80 unpowered camping sites. Other improvements included new camp kitchens, a recreation room, and updated facilities. Alongside these upgrades, the resort's expansion was supported by enhancements to Shark Bay Airport, making the area more accessible. These changes aim to provide more accommodation options and improve the overall visitor experience in the region.

FACILITIES OFFERED



**Swimming
Pool
(with a Heated
option)**



**Camp
Kitchen**



**Recreation
Room**



**Kayak
Hire**



**Children's
Playground**



**Mini
Golf**



**Airport
Shuttle**



OPPORTUNITY AND DEMAND ANALYSIS | KALBARRI DEVELOPMENT OPPORTUNITIES

Key success factors and short-stay accommodation barriers in Kalbarri are summarised below. This summary informs the accommodation opportunities listed on the next page and guides site options and future concept designs for preferred locations.

KEY SUCCESS FACTORS FOR FUTURE ACCOMMODATION PROVIDERS TO LEVERAGE



Kalbarri offers unique natural landscapes and experiences unique to WA.



Its tourism-driven economy is supported by new infrastructure like the Kalbarri Skywalk



Presents rare first-mover opportunities with limited competition as an emerging tourism town



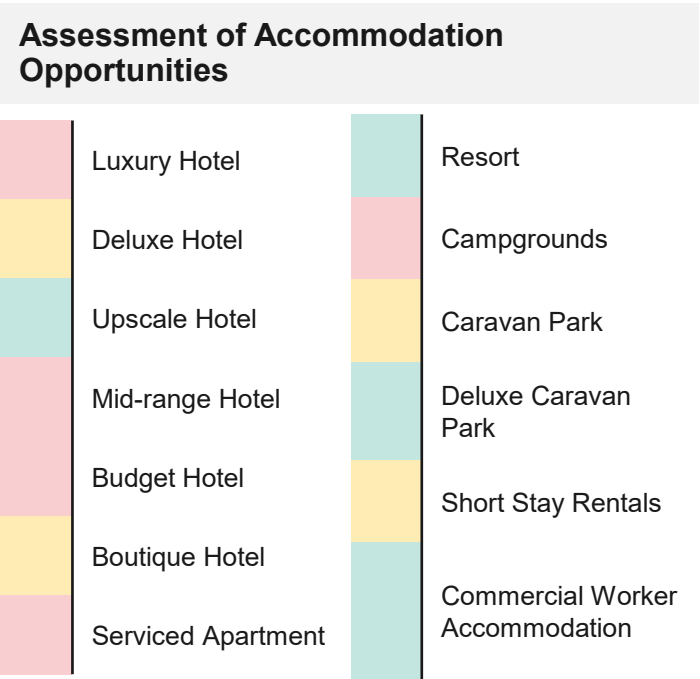
Strategically positioned between Geraldton and Monkey Mia, attracting convenient stopovers for travellers

KEY BARRIERS / ISSUES AND MITIGATING MEASURES

BARRIER / ISSUE	CAUSE	MITIGATING MEASURES
Short “Peak Season”	- Extreme weather conditions may lead to park closures. - Existing attractions may not encourage extended visits	- Greater Investment in tourism infrastructure and offerings which may attract larger crowd, such as a public resort style pool - Support the development of resort-style holiday parks with a wide array of facilities on its own
Inconsistent and unreliable short stay options	Strata-titled units in larger complexes have multiple owners	- Ongoing education and training for short-stay providers - Introduce a larger, more established offering to set quality standards
Cost of development	- Cyclone creating roadblocks, due to increased demand for materials and labour and the need for more robust building standards, thereby driving up costs - Inflation - Labour constraints	- De-risk sites for potential developers prior to going to market - Offer tax incentives and streamline regulatory processes. This may require further assessment, but potential measures could include fee waivers for new developments, rate exemptions, and differential rates for specific organisations. Other arrangements explored by other councils include capital contributions from Treasury Corporation and peppercorn lease deals.
Attracting and retaining staff	- Lack and cost of housing - Kalbarri being more remotely located	- Provide worker accommodation within the development for staff - Explore temporary housing solutions for workers and affordable housing options in conjunction with all stakeholders

OPPORTUNITY AND DEMAND ANALYSIS | KALBARRI DEVELOPMENT OPPORTUNITIES (CONT.)

Given Kalbarri’s tourism-focussed market, there is significant potential for accommodation targeting holiday goers. This could include a deluxe holiday park with family-friendly facilities, a resort, or a deluxe hotel, with eco-tourism concepts leveraging Kalbarri’s unique landscape. The emphasis is on higher-end and high-quality short-stay options rather than mid-range or budget, given the identified opportunity to elevate the region’s tourism identity and attract higher-spending visitors, which would also help to boost the local economy.



Traffic light assessment: green indicates high opportunity, yellow indicates moderate opportunity, and red indicates low opportunity.

Alignment of Accommodation Opportunities

1

ACCOMMODATION TYPES

- **Holiday park – high priority**
- **Resort – high priority**
- Upscale hotel – high priority
- Serviced apartments – low priority
- Mid level hotel – low priority
- Budget hotel – low priority
- Include on-site worker accommodation

2

ACCOMMODATION LOCATION

- Beachfront and river locations or elevated view sites of at least 3 hectares would suit holiday parks and resorts.
- Sites with proximity to the national park also offer a potentially unique, eco-tourism experience distinct to the region.

3

ACCOMMODATION ATTRIBUTES

- Nationally branded holiday parks could enhance the region’s tourism appeal and serve as a benchmark for rates.
- A wide range of facilities can attract longer stays, including a resort-style swimming pool, recreation room, camp kitchen, and playground.

4

ACCOMMODATION SCALE

- Larger land complex to allow for a variety of different accommodation offerings, such as villas, studios as well as caravan and camping sites.
- Ability to accommodate large tour groups of approximately 30 people.
- Respond to the unique characteristics of each site and the landscape to determine appropriate scale and height

OPPORTUNITY AND DEMAND ANALYSIS | TOURISM WORKER DEMAND

Base and elevated case visitor growth in the Mid West, results in the demand for the ‘hotel and similar accommodation’ worker sector in Geraldton to increase by 28-41 workers respectively by 2034 and by 24-35 workers for the ‘hotel and similar’ as well as ‘caravan parks and commercial camping’ market in Kalbarri.

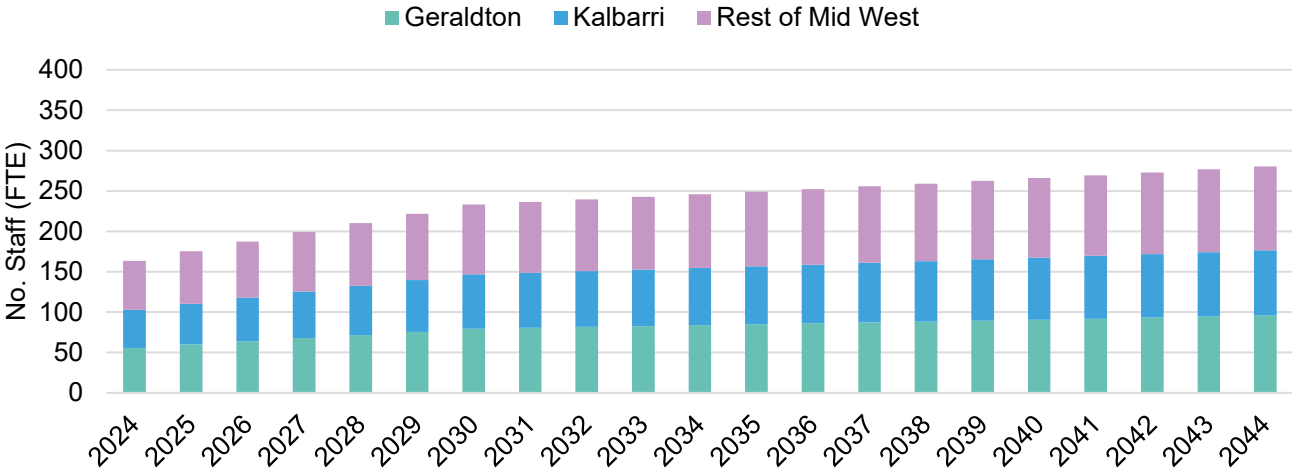
A staff to bed ratio was applied to total room demand figures to determine staffing requirements over the next decade. The adopted staff to bed ratio is 3.7 beds per employee for ‘hotels and similar’ whereas a ratio of 10 sites per employee was used for caravan parks, in line with industry standards. This equates to an increase of 82 to 121 employees over the coming decade in the markets across the Mid West for the segments reviewed (hotels and similar accommodation in all the Mid West region as well as caravan parks in Kalbarri)

The distribution of the growth in accommodation staff is split as follows:

Geraldton is expected to require 37% of future Mid-West hotel staff demand, at approximately 28 to 41 additional employees by 2034.

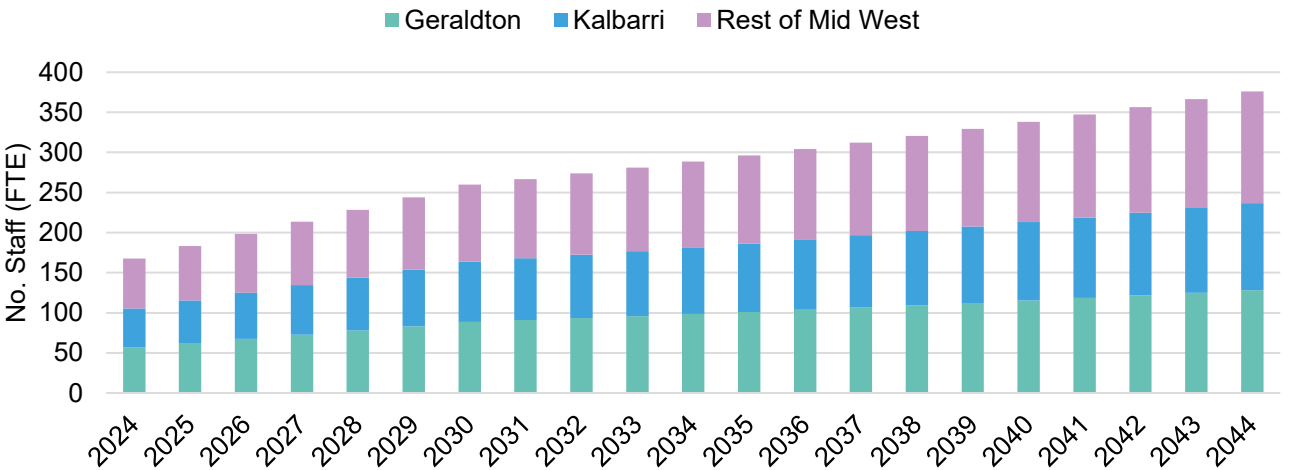
Kalbarri demand is approximately 23% of future Mid-west hotel staff demand, at approximately 18 to 26 additional hotel employees. An additional 6-9 caravan park employees are also expected to be demanded in Kalbarri by 2034. In the near future, this demand is expected to be met by the Woods Street key worker accommodation site, offering up to 30 houses opposite the foreshore, and a temporary overflow caravan site with 15 bays.

Demand for Tourism Workers, Mid West, Base Case



Source: Urbis, ABS, TRA
Note: 'Tourism Workers' refers to FTE accommodation staff

Demand for Tourism Workers, Mid West, Elevated Case



Source: Urbis, ABS, TRA
Note: 'Tourism Workers' refers to FTE accommodation staff

OPPORTUNITY AND DEMAND ANALYSIS | TOURISM WORKER DEMAND

A major challenge for recruitment and staff retainment is the lack of dedicated worker housing for accommodation workers.

Typically, accommodation providers in Geraldton and Kalbarri (Shire of Northampton) will have a small amount permanent full-time staff, often ranging just two to four employees, with the majority of staff as seasonal casuals with numbers fluctuating between peak and off-peak tourism seasons.

Geraldton is expected to have a total bed demand of 36 to 86 for its ‘hotel and similar accommodation’ workers, growing to 54 to 148 in low to peak seasons by 2034 respectively.

Kalbarri (Shire of Northampton), as a market with greater levels of seasonal variation, has a bed demand of just 12 in its low season up to 68 in the peak, which is expected to grow to 18 to 120 in the low and peak seasons by 2034 respectively.

Currently there’s approximately 26 on-site worker housing beds at ‘hotel and similar accommodation’ establishments in Geraldton, whereas Kalbarri has about 11 beds of this kind in addition to approximately 12 staff members accommodated in Northampton caravan parks.

Geraldton is therefore currently estimated to be 54% short in on-site worker accommodation in its shoulder season and 69% short in the peak season. In the low season, Geraldton is still 28% below accommodation total staffing on-site.

Kalbarri is 52% short in the shoulder season and 66% short in the peak season. Kalbarri has adequate supply to accommodate all staff for the low season only.

Geraldton Bed Demand for Hotel, Resort & Motel Workers, 2024-2044						
DEMAND FOR BEDS	2024		2034		2044	
	BASE CASE	ELEVATED CASE	BASE CASE	ELEVATED CASE	BASE CASE	ELEVATED CASE
PEAK SEASON	84	86	126	148	144	193
SHOULDER SEASON	56	57	84	98	96	128
LOW SEASON	36	37	54	63	61	82

Source: Urbis, ABS, TRA

Kalbarri Bed Demand for Hotel & Similar + Caravan Park Workers, 2024-2044						
DEMAND FOR BEDS	2024		2034		2044	
	BASE CASE	ELEVATED CASE	BASE CASE	ELEVATED CASE	BASE CASE	ELEVATED CASE
PEAK SEASON	68	69	102	120	116	156
SHOULDER SEASON	47	48	71	83	81	109
LOW SEASON	12	12	18	21	21	28

Source: Urbis, ABS, TRA

Note: Kalbarri worker demand is inclusive of all demand in the Shire of Northampton local government area.

APPENDIX



GLOSSARY: TOURIST ACCOMMODATION TYPES

The short stay categories presented in this report is based on Tourism WA's definition of short stay categories. Internal assessment has also been done to align the respective rack rates for each of the establishment with the proposed classification.

CATEGORY/SUB-CATEGORY	DEFINITION
Resorts:	Properties that appeal to leisure travellers, typically located in resort markets, and considered a destination in and of themselves with extensive amenity offerings. These properties are typically larger and full-service.
Hotels:	
Luxury	Properties that typify luxury across all areas of operation. Guests will enjoy an extensive range of facilities and comprehensive or highly personalised services. Properties at this level will display excellent design quality and attention to detail.
Deluxe	Properties which achieve a deluxe guest experience. A wide range of facilities and superior design qualities are typically complemented by service standards that reflect the varied and discerning needs of the guest.
Up-scale	Properties that deliver a broad range of amenities that exceed above-average accommodation needs. Good quality service, design and physical attributes are typically fit for purpose to match guest expectations.
Mid-range	Properties that focus on the needs of price conscious travellers. Services and guest facilities are typically limited to keep room rates affordable and competitive but may be available upon request or fee-based.
Budget	Properties that offer budget facilities without compromising cleanliness or guest security. Guests may access fee-based services or facilities upon request.
Boutique	Property that appeals to guests because of its atypical amenity and room configurations. Boutiques are normally independent (with fewer than 200 rooms), have a high average rate and offer high levels of service. Boutique hotels often provide authentic cultural, historic experiences and interesting guest service.

CATEGORY/SUB-CATEGORY	DEFINITION
Resorts:	Properties that appeal to leisure travellers, typically located in resort markets, and considered a destination in and of themselves with extensive amenity offerings. These properties are typically larger and full-service.
Serviced Apartments:	Offer facilities much like a traditional hotel but with added space, convenience and privacy like a home. They have private cooking facilities, larger living/sleeping areas than most standard rooms, and often having access to gyms, restaurants, meeting space, concierges and other hotel-like services. Hotels can offer serviced apartments as part of their offering.
Campground:	A piece of land where people can camp, with varied facilities that include toilets and access to water.
Caravan Parks:	
Caravan Park	Means an area of land on which caravans, cabins/chalets and camps (must include caravans at a minimum), are situated for habitation with varied facilities that include toilets and access to water.
Deluxe Caravan Park	Means an area of land on which caravans, cabins/chalets and camps (must include caravans and cabins/chalets at a minimum) are situated for habitation with varied facilities that include toilets, camp kitchens and access to water. Deluxe caravan parks offer a larger range of visitor services and amenities, such as games areas, playgrounds or swimming pools. Where cabins/chalets form part of the offering, they are generally permanent structures that may provide a higher scale of offering for visitors.
Short-stay rentals	Holiday homes, units or apartments offered for short-term renting, usually through an online booking platform or management agency, including hosted and unhosted properties.
Commercial Worker Accommodation	Commercial accommodation that is utilised specifically or predominantly to provide beds to people that are employed in the visitor economy e.g., backpacker/hostel accommodation.

