

GERALDTON AND KALBARRI TOURIST ACCOMMODATION GROWTH OUTLOOK

2025 - 2044



📍 KALBARRI SKYWALK | KAJU YATKA

THE MID WEST, WITH ITS SPECTACULAR NATURAL LANDSCAPES, INCLUDING THE STUNNING HOUTMAN ABROLHOS ISLANDS, VIBRANT REGIONAL CENTRES, AND RICH CULTURAL CONNECTIONS, IS ON THE BRINK OF SIGNIFICANT TOURISM GROWTH. BOLSTERED BY SUBSTANTIAL GOVERNMENT INVESTMENT, THIS REGION, ANCHORED BY GERALDTON AND KALBARRI, PRESENTS STRONG POTENTIAL FOR NEW TOURISM INFRASTRUCTURE. OPPORTUNITIES ABOUND FOR NATURE, COASTAL, AND CULTURAL EXPERIENCES, PARTICULARLY IN UPSCALE AND HIGH-QUALITY ACCOMMODATION OFFERINGS.



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EXECUTIVE SUMMARY

In 2025, the Mid West Development Commission, in partnership with Tourism Western Australia, Shire of Northampton and City of Greater Geraldton engaged Urbis to undertake an assessment of the current supply of tourist accommodation in the Mid West hubs of Kalbarri and Geraldton, and to forecast the demand and market for accommodation investment over the next decade. The high-level findings are provided in this document.

Kalbarri and Geraldton offer spectacular natural landscapes, vibrant regional centres, diverse cultural connections and access to the Houtman Abrolhos Islands National Park. Geraldton acts as the Mid West's tourism and service hub, while Kalbarri's national park, wildflowers, coastal cliffs and Skywalk attract nature-based visitors year-round.

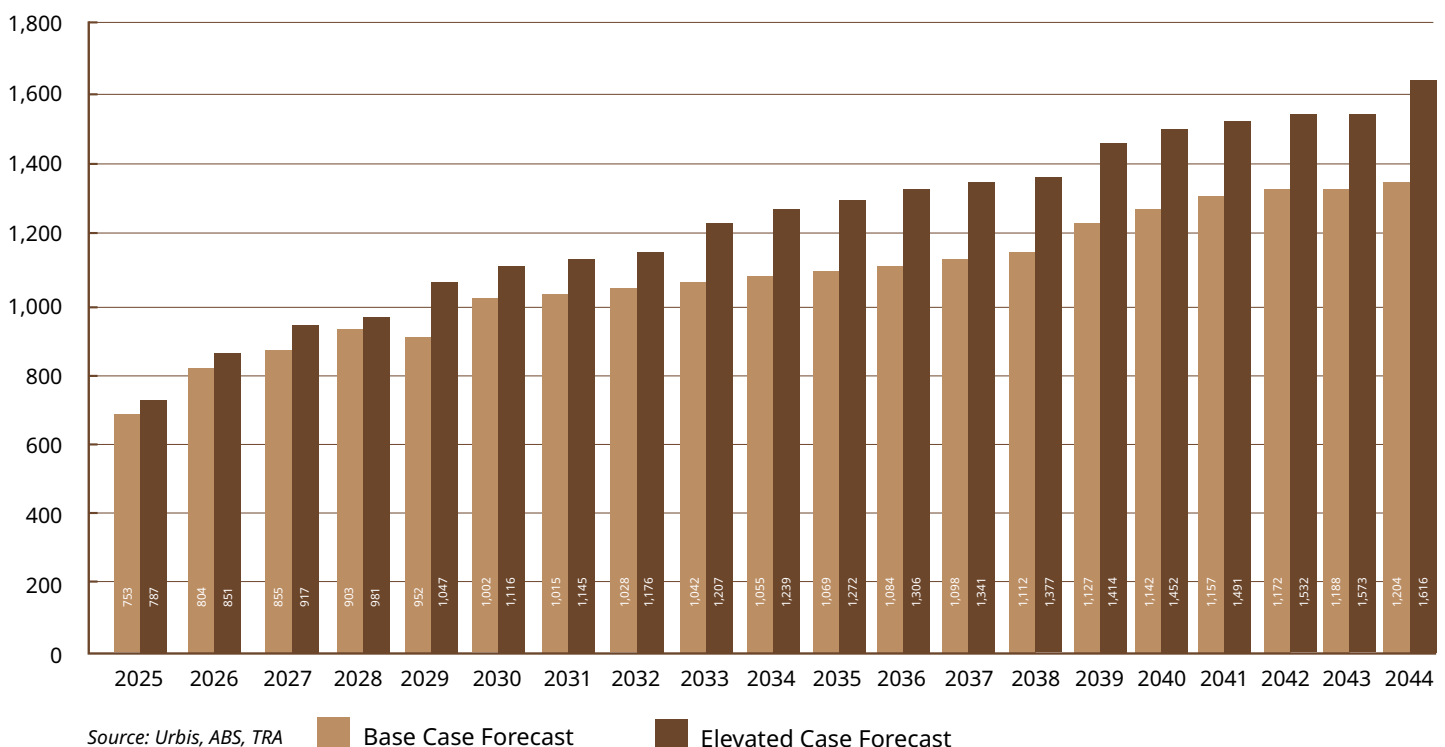
Significant government investment is already underway to enable tourism growth, including Kalbarri's foreshore revitalisation, the Abrolhos Islands sustainable tourism development project, Geraldton marina upgrades and new marine infrastructure to support island and coastal access.

These projects complement the region's strong self-drive market along the Coral Coast Highway and regular air services between Perth and Geraldton, which together underpin visitation.

The Mid West tourism economy is poised for growth, driven by targeted public investment, iconic natural attractions, and increasing visitor demand. There are substantial opportunities to diversify and expand accommodation options to meet modern traveller expectations. This is particularly true for eco-sensitive and upscale offerings in Kalbarri and Geraldton, with strong potential for new developments centred around nature, coastal, and cultural experiences.

From 2024 to 2044, the region will need approximately 500 to 900 additional hotel, resorts and motels rooms to support this growth. Specifically, Geraldton is expected to require an additional 185 to 330 rooms in hotels and similar establishments compared to 2024 levels. Meanwhile, Kalbarri is forecasted to need an increase of 120 to 210 rooms in hotels and similar establishments by 2044, along with an additional 105 to 190 caravan park sites.

REQUIRED HOTEL, RESORT AND MOTEL ROOM FORECAST, MID WEST, 2025 TO 2044





GERALDTON | JAMBINU

Geraldton stands to gain from the introduction of a branded upscale hotel or serviced apartments, whereas Kalbarri shows promise for a larger scale resort or a caravan park with family-friendly facilities.

ACCOMMODATION OPPORTUNITIES	GERALDTON	KALBARRI
ACCOMMODATION TYPES	Upscale hotels and serviced apartments located in the town centre or near the foreshore for views and proximity to the beach. Supported by a strong domestic market, there are also opportunities for the expansion or development of branded, deluxe tourist or caravan parks, as evidenced by the current preference for quality offerings.	Deluxe holiday / caravan park, resorts and upscale hotels, especially at beachfront, riverside locations or sites with elevated views. Sites near the national park also offer a potentially unique, eco-tourism experience distinct to the current offering in the market.
ACCOMMODATION ATTRIBUTES	Accommodation offering with conference, function and restaurant facilities to accommodate corporate events and weddings, noting the current lack of large conference / function facilities in Geraldton.	Larger scale accommodation offering with an ability to accommodate large tour groups and offer a wide range of family-friendly facilities to attract longer stays.

For investors, Geraldton and Kalbarri present a compelling opportunity to tap into identified gaps and enter a market with strong potential for sustainable growth. Kalbarri's unique tourism landscape and Geraldton's stable accommodation market, bolstered by corporate stays, offer substantial opportunities for new developments.

WESTERN AUSTRALIAN CONTEXT

Western Australia is one of the largest states in the world and a key driver of Australia's economy. Located in the GMT +8 time zone, the state enjoys direct alignment with major global markets, supporting strong trade and tourism connections across Asia, Europe and beyond.

Perth, the state's capital, is a major international aviation hub with direct flights to 20 global destinations, including 17 of Asia's largest cities, and remains the only Australian city offering non-stop services to Europe.

Domestically, Western Australia continues to benefit from Australians' strong preference for intrastate and interstate travel.

From Perth, the Mid West is accessible by road via the Coral Coast Highway or through regular

air services into Geraldton, the regional gateway to the broader Mid West region, including Kalbarri and the Houtman Abrolhos Islands.

10.6 MILLION

Overnight trips in
WA in YE December

7.9% ↑

Increase from YE
December 2019

AU\$12.7 BILLION

Overnight visitor
spend in WA in YE
December 2024

47.7% ↑

Surge from YE
December 2019

MID WEST - HISTORY AND ECONOMY

The Mid West region of Western Australia encompasses a large area of the state, with Geraldton, in the City of Greater Geraldton, as the regional capital (and largest city north of Perth) and Kalbarri, in the Shire of Northampton, as a key coastal tourism hub.

Aboriginal people have lived in the Mid West for tens of thousands of years prior to European settlement, with multiple language groups connected to the coastal, inland and island environments. European settlement began in the mid-1800s, initially centred around fishing, pastoralism and mining, and Geraldton soon emerged as a key port for exports. The Houtman Abrolhos Islands were integral to the region's maritime history, particularly for fishing and pearling, and remain central to its identity.

Tourism in the region developed steadily through the late 20th century, with Kalbarri National Park, its iconic coastal cliffs and the Murchison River gorges becoming major drawcards. The opening of the Kalbarri Skywalk in 2020, combined with the up-and-coming revitalisation of the town foreshore and investment in the Abrolhos Islands National Park and sustainable

tourism development, are further strengthening the region's visitor appeal. Additionally, the Hutt Lagoon Pink Lake near Port Gregory, situated between Kalbarri and Geraldton, has continued to attract international visitors thanks to social media exposure. Plans to upgrade the tourism facilities as part of the Pink Lake Cultural Tourism project are currently underway, further enhancing the region's international profile.

Visitor spend is driven by nature-based experiences, including wildflower tourism, coastal and marine adventures, and heritage attractions. While mining remains the largest industry for the region, emerging tourism products tied to the Abrolhos Islands, the Hutt Lagoon Pink Lake and Kalbarri National Park offer significant growth potential. Geraldton and Kalbarri's strategic locations between Perth and popular northern WA tourism destinations such as Shark Bay and Exmouth position these towns as key stopover destinations, connecting to WA's broader multi-destination road trip network.

The Mid West's diversity extends inland, attracting adventurous tourists to locations

MID WEST - HISTORY AND ECONOMY CONTINUED

like Coalseam Conservation Park, Rangelands Parks, Walga Rock, Murchison Settlement, Peace Gorge, and the heritage hotspot of Cue. Easily accessible by road from Perth and Geraldton, the Mid West's strategic location along key travel routes to northern destinations like Exmouth enhances its appeal.

Tourism and related industries, such as accommodation, hospitality, and retail, have seen consistent growth, with tourism output increasing by 55% from 2011 to 2024, reaching \$394 million. The sector represents nearly 7% of total jobs, making it a vital contributor to the local economy. Further infrastructure upgrades, including Geraldton's marina, Kalbarri's foreshore, and new overnight access at the Abrolhos Islands, will support continued growth.

Despite fluctuations in visitor nights over the past decade, the Mid West has shown resilience. Domestic visitors, who accounted for 85% of total visitation in 2023, have shielded the region from severe impacts experienced by other Australian tourism markets.

This stability underscores the region's potential for sustained growth. With visitors primarily aged 50+ and often travelling as couples or alone, the Mid West benefits from a high average trip spend, driving the local economy and fostering a vibrant tourism market.

As the core economic driver of the region, the resource/mining sector will continue to play a highly significant role in the Mid West economy and will dominate the prospective project pipeline. Notable future projects, such as the Eneabba Rare Earths Processing Plant, Murchison Hydrogen Renewables Project, and the Australian Vanadium Project, are projecting a need for up to 9,000 jobs if they proceed. This would include up to 6,100 construction workers and 4,850 operational workers at their respective peak impact years. The influx of workers would necessitate significant investment in accommodation, driving demand for both long-term and short-stay options as project teams increase their presence in the region. These developments, on top of the tourism-specific drivers, would play a crucial role in shaping the accommodation landscape in the Mid West, fostering the region's growth.

1,732 JOBS

Mid West tourism employment (2024)

62% from City of Greater Geraldton and

13% from Shire of Northampton

AU\$394 MILLION

Estimated annual Mid West
tourism economic output (2024)

60% from City of Greater Geraldton and

16% from Shire of Northampton

613,000

Total visitors

2.8 MILLION

Visitor nights

AU\$700

Average trip spend

4.6 DAYS

Average trip length
(domestic and
international visitors)

Source: Urbis, ABS, Remplan, Tourism WA, TRA



RECENT TOURISM INVESTMENT INFRASTRUCTURE TIMELINE

COMPLETED PROJECTS



RECENT TOURISM INVESTMENT INFRASTRUCTURE TIMELINE

The WA Government is dedicated to enhancing the Mid West's tourism landscape through significant investments in various tourism offerings and infrastructure listed below. This commitment is set to drive a notable increase in visitor numbers, a trend expected to continue as the state rolls out new initiatives and completes major projects. In addition to secured government funding, there is also continued investment made by the private sector to support the broader tourism growth for the region.

LOCATION	PROJECT NAME	ESTIMATED PROJECT VALUE
ABROLHOS ISLANDS	Abrolhos Islands Visitor Infrastructure: Rat Island Jetty, Rest Area and Moorings	AU\$8.1 million
KALBARRI	Kalbarri Foreshore Revitalisation Phase 1	AU\$8.1 million
GERALDTON	West End Precinct (Stage 1)	AU\$16.1 million
VARIOUS	Plan for Our Parks (incl. Walga Rock)	AU\$24 million
GERALDTON	Stage 2 of the Geraldton Batavia Coast Marina – Station Square	AU\$10 million
HORROCKS	Horrocks Beach Caravan Park	AU\$4 million
GERALDTON	African Reef Hotel Expansion	AU\$1.1 million
PROPOSED		
GERALDTON	West End Precinct (Stage 2)	AU\$70 million
CHAPMAN VALLEY	Moresby Ranges Conservation Park	AU\$22 million
MURCHISON	Murchison Vast Sky (accommodation)	AU\$16 million
NORTHAMPTON	Pink Lake and Lucky Bay Tourism	AU\$10 million+

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

COMPETITIVE ADVANTAGES

Drivers for tourism industry growth worldwide have shifted in recent years as people reassess how they prioritise spending their disposable income and leisure time, with broader macroeconomic factors also influencing travel behaviours. Key advantages that the Mid West region (Geraldton, Kalbarri and surrounds) offers, which align with these drivers, are noted below.

ICONIC NATURAL LANDSCAPES AND MARINE ENVIRONMENTS	The Mid West is home to some of Western Australia's most striking natural assets, including Kalbarri National Park with its dramatic gorges, coastal cliffs and the popular Skywalk, as well as the Houtman Abrolhos Islands National Park, a globally significant marine environment rich in history, wildlife and coral reefs. These destinations provide unique opportunities for both adventure and nature-based tourism.
ESTABLISHED TOURISM HUBS WITH GROWTH CAPACITY	As the largest city north of Perth, Geraldton functions as the regional capital and primary service centre, offering strong infrastructure, retail and hospitality foundations. Kalbarri is an established holiday destination with a growing tourism product mix and iconic natural attractions. Both towns have capacity to expand accommodation offerings and leverage revitalised public spaces, such as Kalbarri's soon to be upgraded foreshore and Geraldton's waterfront precincts.
ACCESSIBLE LOCATION WITH MULTIPLE TRANSPORT OPTIONS	The Mid West is easily reached via the Coral Coast Highway, one of WA's most popular self-drive routes, and through regular air services between Perth and Geraldton. Geraldton's deep-water port, marina upgrades and Abrolhos access improvements further support marine tourism growth and position the region as a gateway to the Coral Coast and Golden Outback.
CULTURAL DEPTH AND HERITAGE VALUE	The region is rich in Aboriginal cultural heritage, with multiple language groups connected to Country for tens of thousands of years. Visitors can experience authentic cultural tours, art centres and heritage trails. European settlement history (including maritime heritage of the Abrolhos Islands and Geraldton's port origins) also strengthens the region's cultural appeal.
YEAR-ROUND APPEAL AND DIVERSE EXPERIENCES	With a temperate coastal climate, the Mid West supports tourism across all seasons. Key experiences include wildflower trails in spring, coastal adventure activities, fishing, diving, marine wildlife tours and heritage attractions, appealing to a broad mix of domestic and international markets.
STRONG GOVERNMENT AND INFRASTRUCTURE INVESTMENT	Significant public and private investment is currently underway, including the Abrolhos Islands Sustainable Tourism development project, West End precinct, expansion of the Geraldton marina and Kalbarri foreshore upgrades, which will enhance the visitor experience and stimulate private sector accommodation and tourism product development.

GROWTH IN OCCUPANCY RATES & ADR

The Mid West region covers approximately 285,000 square kilometres, stretching from the Indian Ocean coastline to inland pastoral and mining areas. The Australia's Coral Coast region overlaps significantly, encompassing the Mid West's entire coastal area including key locations such as Geraldton and Kalbarri.

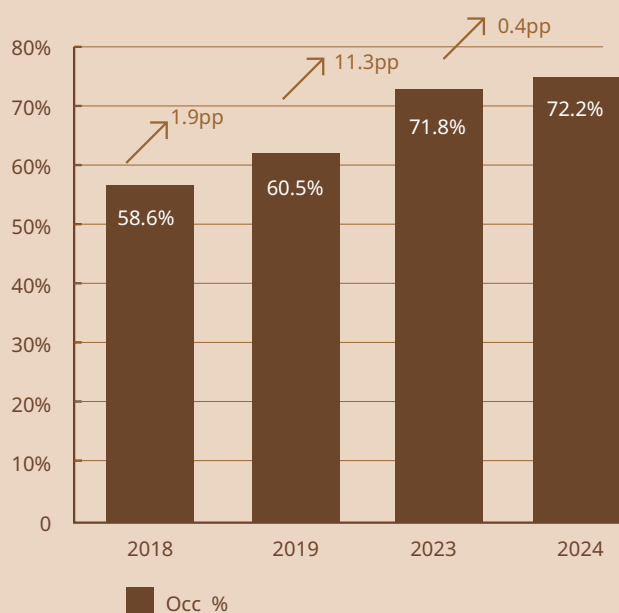
Occupancy rates and average daily rates (ADR) for the Coral Coast region have demonstrated significant growth from the years leading up to the pandemic to recent times. Average annual occupancy rates for the region increased from 60.5% in 2019 to 72.2% in 2024. Similarly, ADRs saw a substantial increase of more than 39% from 2019 to 2024.

On a yearly basis, the region remains largely

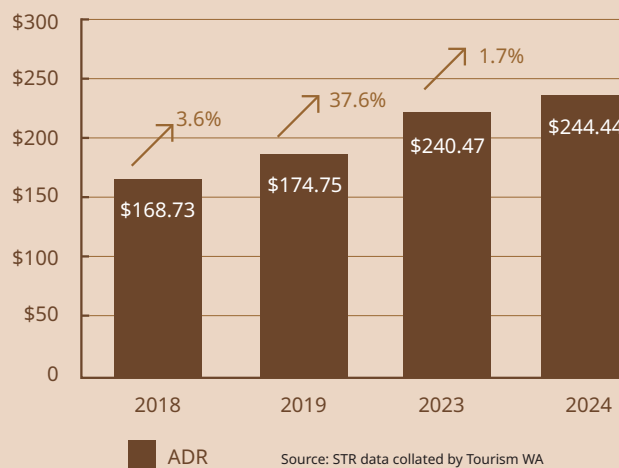
stable, particularly supported by areas such as Geraldton, where corporate stays predominantly drive demand. With an average occupancy rate of 75% for FY2024-25, the lowest recorded monthly occupancy was only 7 percentage points below this average. This stability creates a predictable environment for business operations, ensuring a steady revenue stream to cover operational costs and achieve profitability.

Despite consistent demand, the region has not seen significant new accommodation developments, with most projects centred on expansion. This presents a clear opportunity for investors to capitalise on the evident market gap.

OCCUPANCY RATES GROWTH CORAL COAST



ADR GROWTH CORAL COAST



TOURISM DEMAND AND ACCOMMODATION OPPORTUNITIES

Investment in short-stay accommodation in the Mid West is crucial to capitalise on visitor growth. The anticipated increase in visitor nights, projected to grow by up to 135% by 2044, will drive demand for an estimated 500 to 900 new rooms in the Mid West over the next two decades.

Of the total required room figure in the Mid West, Geraldton is expected to require an additional 185 to 330 rooms in hotels and similar establishments compared to 2024 levels. Meanwhile, Kalbarri is forecasted to need an increase of 120 to 210 rooms in hotels and similar establishments by 2044, along with an additional 105 to 190 caravan park sites.

These two destinations, while equally attractive, each offer unique experiences. Geraldton, the service hub of the Mid West, benefits from

a robust worker and corporate stay market, with business visitors comprising 24% of total domestic visitors in 2023-24. This helps maintain stable occupancy rates throughout the year. Additionally, 47% of visitors stay in non-commercial accommodation, such as with friends or relatives, indicating a potentially unmet demand for hotels or serviced apartments.

Kalbarri, home to the renowned Kalbarri National Park, attracts nature enthusiasts year-round. Holiday travellers dominate the market, with 84% of domestic visitors and 100% of international visitors in 2023-24. Caravan parks are the preferred accommodation for 56% of domestic visitors, while 32% of international visitors prefer hotels, indicating an opportunity for a diverse mix of accommodation options targeting leisure stays.

**500 TO 900
NEW ROOMS**

Required in the next
20 years to capture growth
in demand in the Mid West

**185 TO 330
ROOMS**

Required in Geraldton

**120 TO 210
ROOMS**

Required in Kalbarri

*hotel, resorts & motels only

11%

Increase in visitor
nights in WA
2023-2024

AU\$251

Hotel ADR (Average FY2024-25),
ranges from \$225 - \$280
(for ACC region)

75%

Average Hotel Occupancy
Rate FY2024-25, ranges
from 67% - 85%
(for ACC region)

91,000 - 163,000

Forecast Annual Visitor Night Growth in
the Mid West, 2024-44 (Range)

Source: Urbis, ABS, Tourism WA, TRA

ENABLING THE OPPORTUNITY

While the Mid West region offers significant advantages, several factors have influenced the pace of new short-stay accommodation development. High construction costs remain a challenge across Western Australia, and the Mid West is no exception. The WA Government is working with industry to deliver innovative solutions, including streamlining the development process and reducing delivery risks for proponents.

The Mid West benefits from a diverse year-round visitor profile, with strong demand from self-drive travellers, nature-based visitors, and intrastate holidaymakers. However, there are opportunities to further grow shoulder-season and mid-week visitation by leveraging the region's strong events calendar, revitalised public spaces such as the Geraldton waterfront, and emerging tourism product on the Houtman Abrolhos Islands.

Workforce availability and housing remain key constraints for operators. Like many regional centres, the Mid West faces pressure on its housing market, which limits the supply of both short-term and permanent accommodation for seasonal workers. Strong demand is also reflected in the property market, with residential, commercial and rural prices in Geraldton among the fastest growing in Australia throughout 2024 and 2025.

The City of Greater Geraldton and the Shire of Northampton are actively pursuing initiatives to improve access to key worker accommodation, recognising the importance of a stable workforce to support tourism growth.

In Kalbarri, for example, demand for key worker accommodation is expected to be met by the Woods Street key worker accommodation site, which will provide up to 30 houses opposite the foreshore, and a temporary overflow caravan site with 15 bays.

There is scope to further differentiate the region's accommodation offering by diversifying into premium eco-tourism products and experiences that respond to evolving visitor expectations and complement the Mid West's natural and cultural strengths.

ENABLERS

- Addressing high construction costs through streamlined development processes and minimising headworks constraints in key locations
- Expanding and diversifying visitation through events, new product, and year-round marketing
- Delivering dedicated workforce accommodation to support operators and sustain growth



WHY INVEST IN THE MID WEST

The Mid West region, anchored by Geraldton and Kalbarri, offers a rich combination of coastal, marine and outback landscapes that are unique within Western Australia. As a well-established tourism destination, the region has a strong base of accommodation providers, tour operators and food and beverage experiences that serve both domestic and international markets. This maturity provides the foundation for new investors to develop offerings that complement the region's existing brand strength and growing reputation along the Coral Coast.

The WA Government, the City of Greater Geraldton and the Shire of Northampton are investing heavily in tourism infrastructure, with major upgrades to Kalbarri's foreshore,

the Geraldton waterfront precinct, and the Abrolhos Islands Sustainable Tourism development project improving access and visitor experiences. These investments, combined with increasing demand for nature-based travel and the Mid West's year-round appeal, position the region for sustained growth.

New premium accommodation offerings are key to unlocking this opportunity. There is potential for upscale hotels and serviced apartments, larger scale resort or a deluxe caravan park with family-friendly facilities that leverage the Mid West's unique coastal and island environments. With limited high-end accommodation supply currently available, this segment represents a clear market gap.

INVESTMENT HIGHLIGHTS

DIVERSE YEAR-ROUND DEMAND	The Mid West enjoys a balanced visitor profile across self-drive, nature-based and intrastate holiday markets, supporting consistent visitation throughout the year. Geraldton is the regional gateway for the Abrolhos Islands National Park, while Kalbarri National Park remains a major driver of nature-based tourism. Recent public investment is expected to lift visitor nights and spend over the next decade.
STRONG ACCOMMODATION METRICS	Occupancy rates have demonstrated significant growth, increasing from 60.5% in 2019 to 72.2% in 2024. Similarly, average daily rates saw a substantial increase of 39.9% from 2019 to 2024. On a yearly basis, the region also remains largely stable, helping to provide a more predictable environment for business operations. Despite this, there have been limited new developments, presenting a clear opportunity for investors to capitalise on the growing demand.
SUPPORTIVE GOVERNMENT AND INFRASTRUCTURE PIPELINE	The WA Government, the City of Greater Geraldton, and the Shire of Northampton are actively investing in tourism-enabling infrastructure. On top of this, government is committed to working with the industry to streamline development processes, reduce delivery risks for proponents, and actively pursue initiatives to improve access to key worker accommodation, recognising the importance of a stable workforce to support tourism growth.
EVIDENT MARKET GAP	While the Mid West is a well-established tourism region with a strong base of operators, it lacks a diversity of premium accommodation that matches the expectations of high-yield markets. The anticipated increase in visitor nights for the region, projected to grow by up to 135% by 2044, will drive demand for an estimated 500 to 900 new rooms over the next two decades.

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MID WEST
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