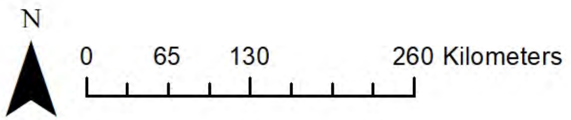


The Big Carnaby sculpture location in Tourism Regions
Located in 'Golden Outback' but right on border with' Coral Coast'

Australia's Golden Outback

Overnight Visitor Factsheet 2021

Prepared by Tourism WA Insights and Planning
July 2022

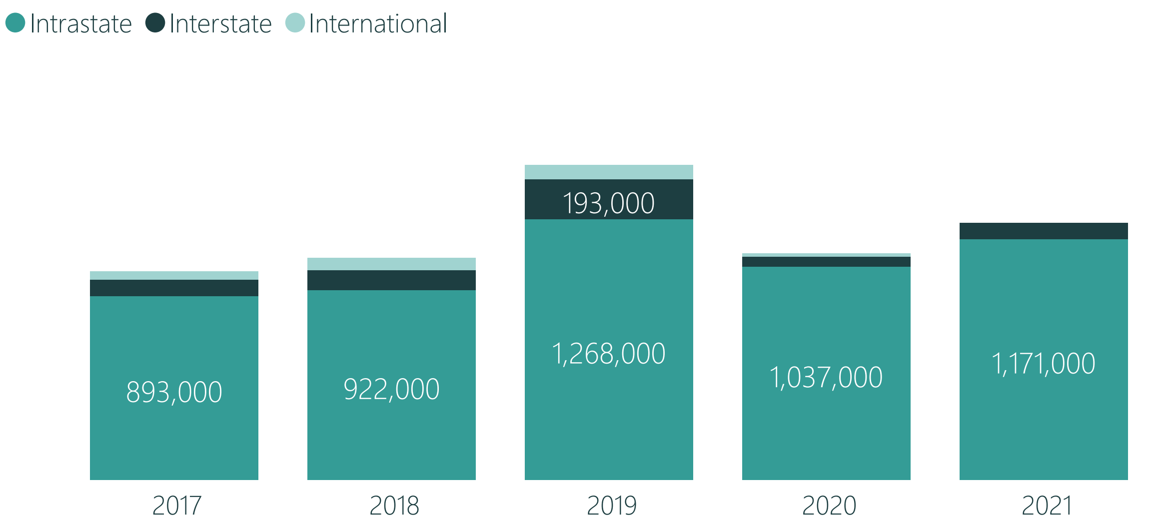
Overnight visitor and spend estimates in this factsheet are provided for the past five calendar years. Additional results not in this factsheet are available in the interactive chart on Tourism WA's website here.

Demographic and trip details estimates are based on a two-year average to increase the sample size and hence improve the reliability of the data. Due to the small number of interstate and international visitors to WA in 2020 and 2021, these markets are based on an average of 2018 and 2019 (2018/19). The intrastate market is based on an average of 2020 and 2021 (2020/21) with comparisons to 2018 and 2019 (2018/19).

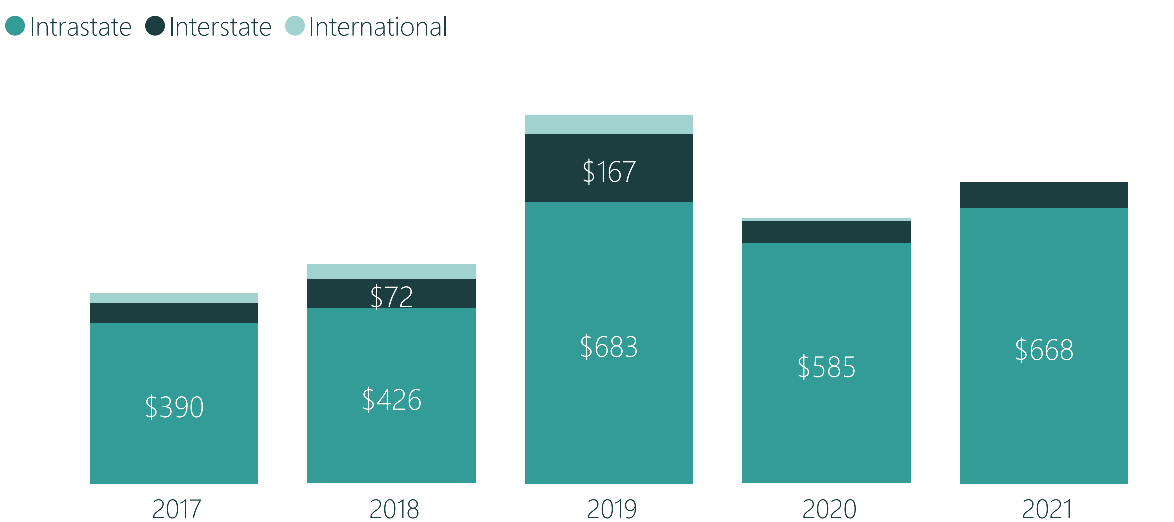
Overnight Visitor Summary 2021 - Australia's Golden Outback

The data in this factsheet refers to visitors who have spent at least one night in Australia's Golden Outback

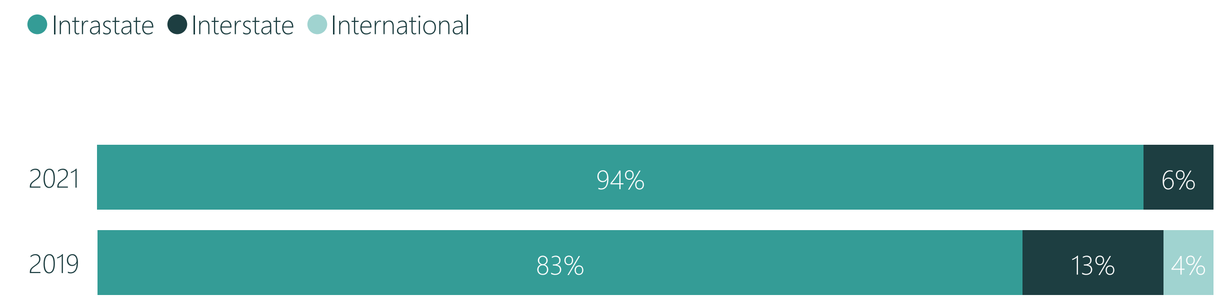
Overnight Visitors



Overnight Visitors Spend ($ millions)



Share of Overnight Visitors - change vs. pre-COVID



Overnight Visitor Metrics

	Avg. Trip Length 2021	Average Trip Spend 2021	Average Daily Spend 2021
Intrastate	4.9 Days	$570	$116
Total Domestic + International	5.3 Days	$585	$111

Additional visitor, nights and spend results can be found on the interactive chart on Tourism WA's website here.

International and interstate metrics are unable to be provided due to the small sample size.

Intrastate Overnight Visitor Details - Australia's Golden Outback

Two Year Average - 2020/21

The data in this factsheet refers to visitors who have spent at least one night in Australia's Golden Outback

Intrastate Visitors

1,105,000

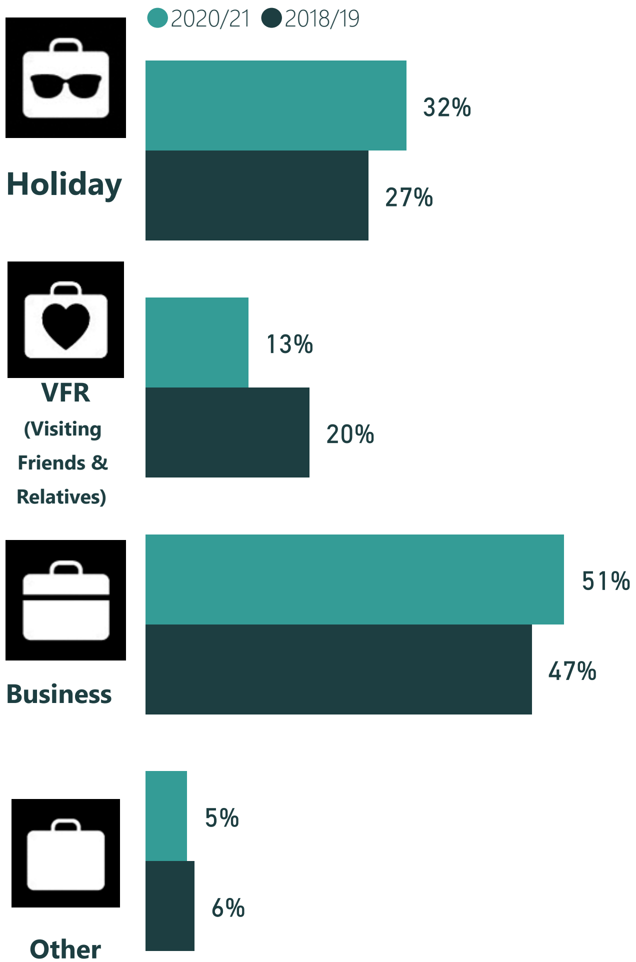
Annual Average 2020/21

Intrastate Nights

5,162,000

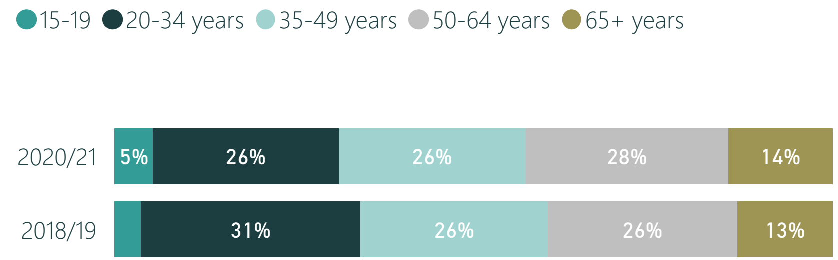
Annual Average 2020/21

Purpose of Travel

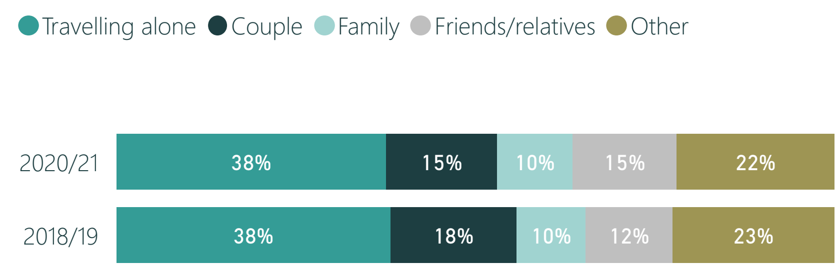


Sum of purpose may add to more than 100% as overnight visitors can visit the Region for more than one reason.

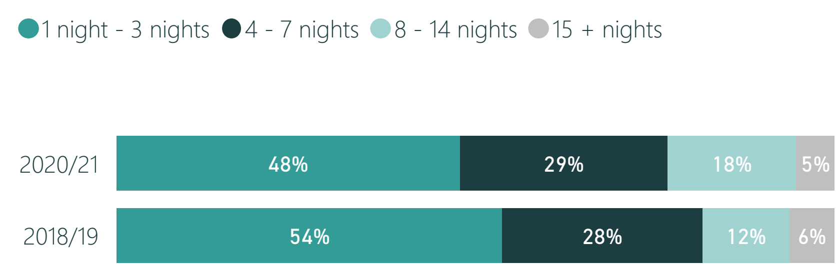
Age



Travel Party



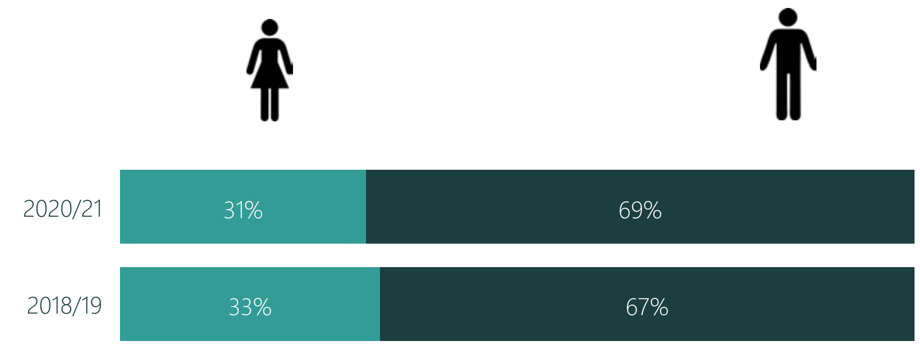
Length of Stay



Top 3 Home Local Government Area (LGA)

Home LGA	2018/19	2020/21
Kalgoorlie-Boulder	8%	6%
Stirling	8%	6%
Swan	4%	6%

Gender



Definition

Domestic Visitors (Intrastate): Western Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home. Note, intra-regional travel is included, i.e. the home and stay may fall within the same region.

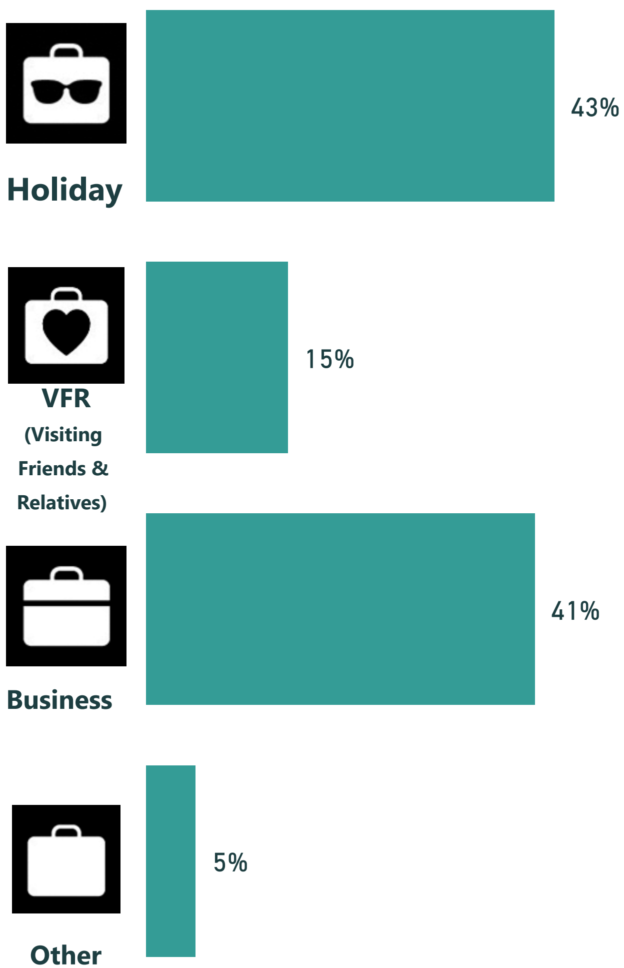
Interstate Overnight Visitor Details - Australia's Golden Outback

Two Year Average - 2018/19

The data in this factsheet refers to visitors who have spent at least one night in Australia's Golden Outback

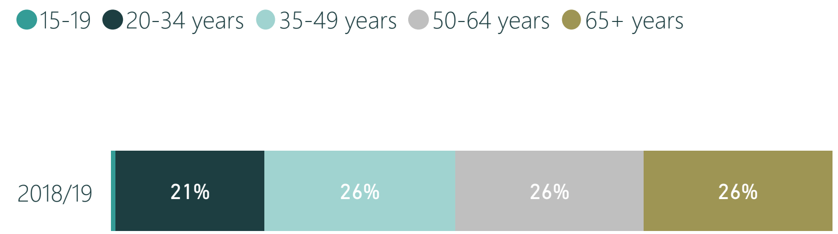
Interstate Visitors	Interstate Nights
146,000	1,112,000
Annual Average 2018/19	Annual Average 2018/19

Purpose of Travel

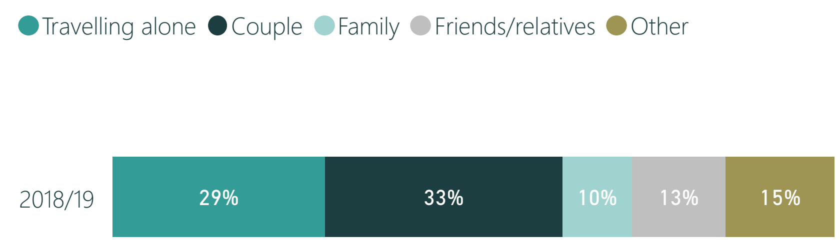


Sum of purpose may add to more than 100% as overnight visitors can visit the Region for more than one reason.

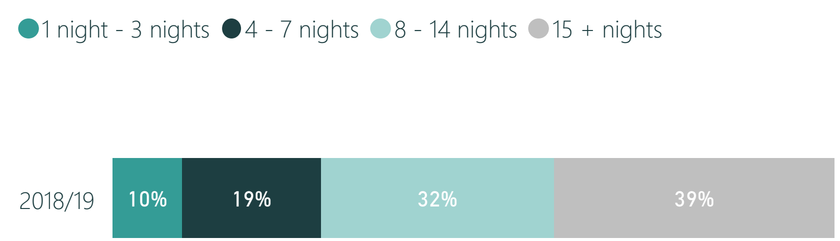
Age



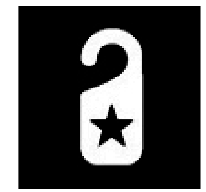
Travel Party



Length of Stay



Top 3 Home State/Territory



Home State	2018/19
New South Wales	25%
South Australia	24%
Victoria	23%

Gender

Definition

Domestic Visitors (Interstate): Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home.

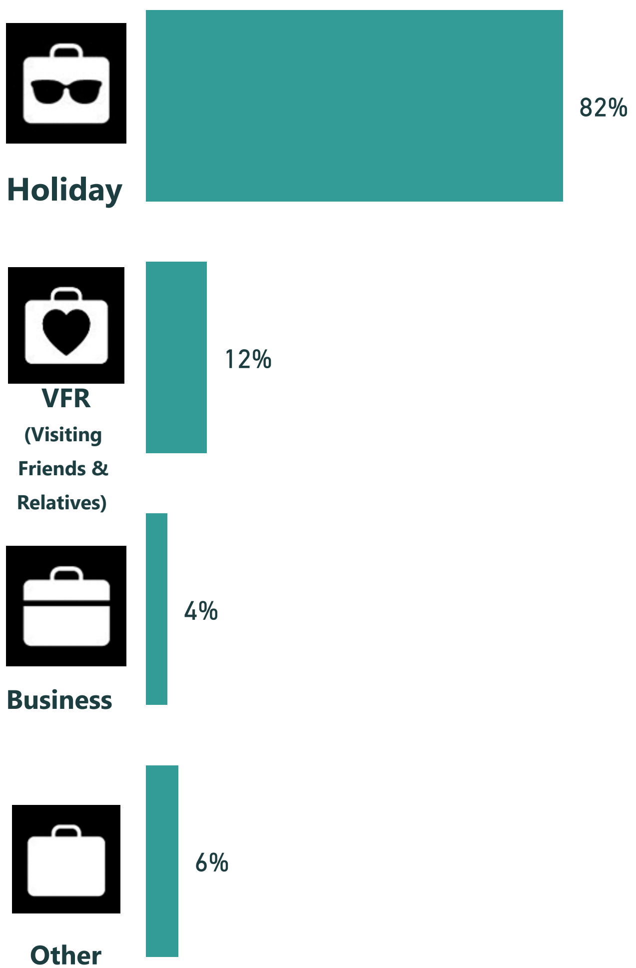
International Overnight Visitor Details - Australia's Golden Outback

Two Year Average - 2018/19

The data in this factsheet refers to visitors who have spent at least one night in Australia's Golden Outback

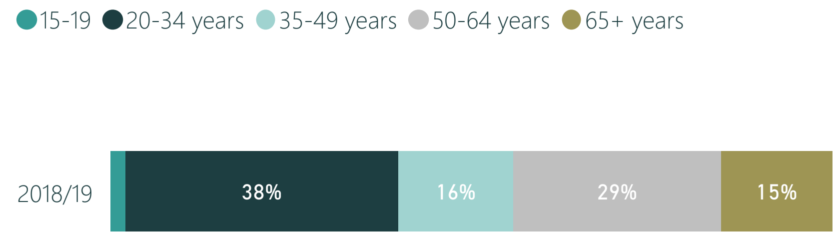
International Visitors	International Nights
64,000	732,000
Annual Average 2018/19	Annual Average 2018/19

Purpose of Travel

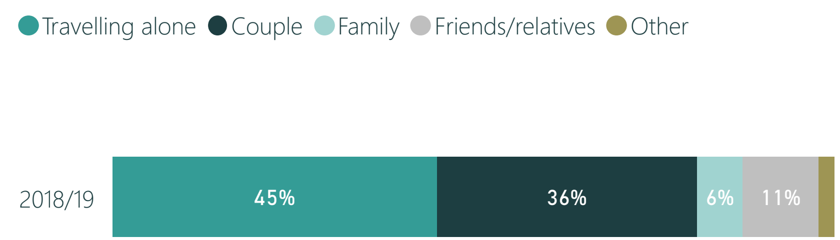


Sum of purpose may add to more than 100% as overnight visitors can visit the Region for more than one reason.

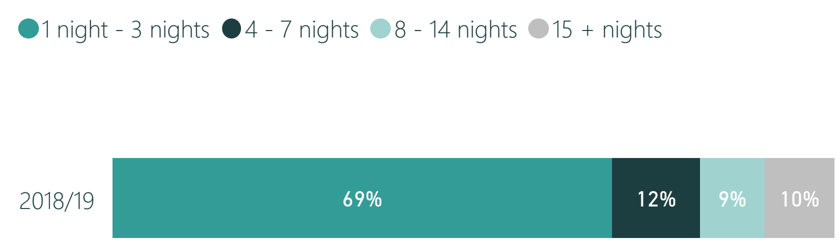
Age



Travel Party



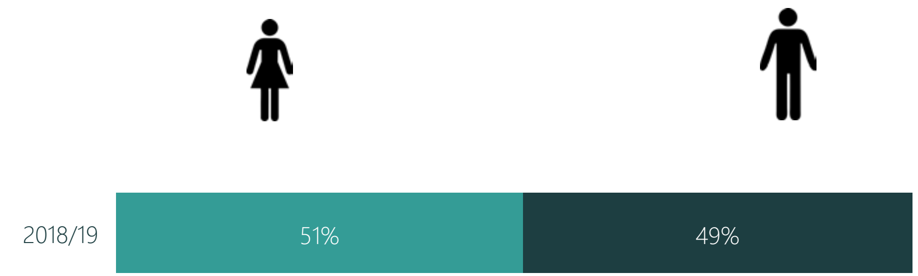
Length of Stay



Top 3 International Markets

Home Country	2018/19
Germany	15%
United Kingdom	13%
New Zealand	9%

Gender



Definition

International Visitors: aged 15 years and over who spent at least one night in the region and are staying in Australia for 12 months or less.

Domestic Overnight Visitor Details - Australia's Golden Outback

Two Year Average - 2020/21

The data in this factsheet refers to visitors who have spent at least one night in Australia's Golden Outback

Top 3 accommodation (% of nights) - Intrastate

Accommodation	2018/19	2020/21
Other Accommodation	37%	43%
Friends or relatives property	15%	12%
Hotel/resort/motel or motor Inn	14%	13%

Top 3 accommodation (% of nights) - Interstate

Accommodation	2018/19
Other Accommodation	39%
Hotel/resort/motel or motor Inn	16%
Friends or relatives property	14%

Top 3 accommodation (% of nights) - International

Accommodation	2018/19
Other Private Accommodation	31%
Rented house/apartment/flat or unit	19%
Friends or relatives property	19%

Top 3 activities - Intrastate

Activity	2018/19	2020/21
Eat out / dine at a restaurant and/or cafe	38%	31%
Pubs, clubs, discos etc	23%	21%
Visit friends & relatives	25%	16%

Top 3 activities - Interstate

Activity	2018/19
Eat out / dine at a restaurant and/or cafe	48%
Sightseeing/looking around	25%
Pubs, clubs, discos etc	20%

Top 3 activities - International*

*International visitors may have undertaken the activity in the region or elsewhere in Australia

Activity	2018/19
Eat out / dine at a restaurant and/or cafe	92%
Sightseeing/looking around	85%
Go to the beach	82%

Top 3 Local Government Areas (LGA's) visited - Intrastate

LGA Visited	2018/19	2020/21
Kalgoorlie-Boulder	17%	21%
Esperance	14%	15%
Leonora	7%	7%

Top 3 Local Government Areas (LGA's) visited - Interstate

LGA Visited	2018/19
Kalgoorlie-Boulder	39%
Esperance	29%
Dundas	26%

Top 3 Local Government Areas (LGA's) - International

LGA Visited	2018/19
Esperance	47%
Kalgoorlie-Boulder	24%
Kondinin	21%

Visitor Factsheet - Further Information

The data in this factsheet refers to visitors who have spent at least one night in Australia's Golden Outback

Important Note

All data is sourced from Tourism Research Australia's National and International Visitor Surveys (NVS and IVS).

To increase the sample size and hence improve the reliability of the data, visitor and nights estimates in this document are based on an average of two calendar years.

The demographics and trip details for intrastate visitors have been updated to show comparisons between 2020/21 (current) and 2018/19 (pre-COVID). Due to the small number of international and interstate visitors to WA in 2020/21, only 2018/19 has been provided for these markets. It is hoped that in future revisions of this factsheet, it will be possible to compare international and interstate visitor demographics and trip details with pre-COVID.

It is recommended by Tourism WA that the visitation statistics in this fact sheet are used in conjunction with other information sources that you have access to. This might include population statistics from the Australian Bureau of Statistics, feedback from local operators, information from local Visitor Centres, data from local councils etc.

Methodology and definition changes are made to both the IVS and the NVS from time to time. As such, estimates in this factsheet are not comparable to previous factsheets. For further information, see NVS Methodology or IVS Methodology on Tourism Research Australia's website and the Changing Visitor Spend factsheet on Tourism WA's website.

Definititions

Domestic Visitors (Intrastate): Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home. Note, intra-regional travel is included, i.e. the home and stay may fall within the same region.

Domestic Visitors (Interstate): Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home.

International Visitors: International visitors aged 15 years and over who spent at least one night in the Region and are staying in Australia for 12 months or less.

Sample Size and Confidence Intervals

Year	2018/19			2020/21		
Market	Sample size	95% Confidence Interval Visitors (±)	95% Confidence Interval Nights (±)	Sample size	95% Confidence Interval Visitors (±)	95% Confidence Interval Nights (±)
Intrastate	961	7%	11%	804	7%	10%
Interstate	133	20%	22%	52	30%	29%
Domestic	1,094	7%	10%	856	7%	10%
International	753	9%	23%			

Note: Estimates in this factsheet need to be considered within the Confidence Intervals in this table. Data has not been provided where the Sample Size is less than 40 or the Confidence Interval is greater than ±50%.

Source

Tourism Research Australia, National and International Visitor Surveys, 2021

Australia's Coral Coast

Overnight Visitor Factsheet 2021

Prepared by Tourism WA Insights and Planning
July 2022

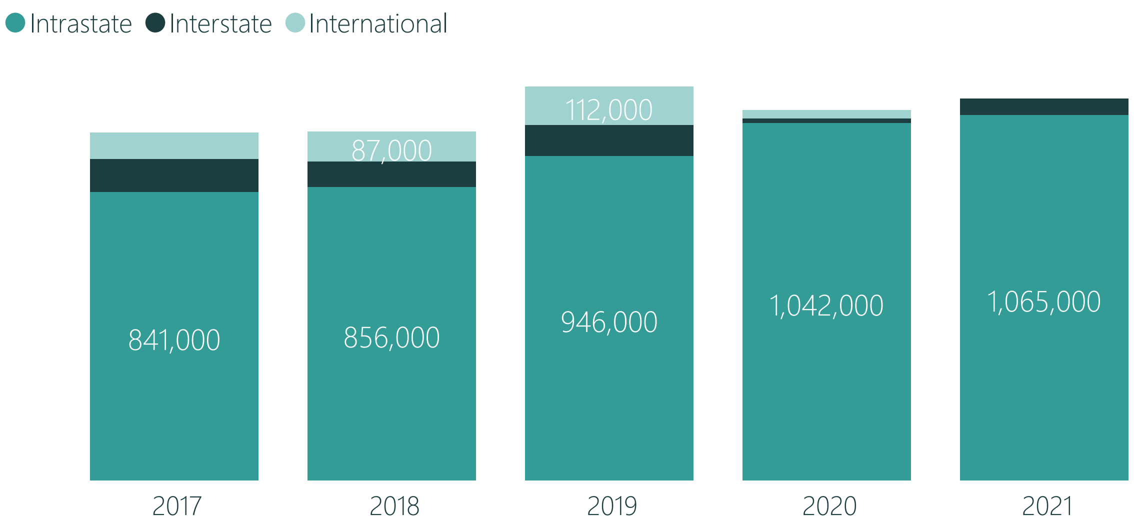
Overnight visitor and spend estimates in this factsheet are provided for the past five calendar years. Additional results not in this factsheet are available in the interactive chart on Tourism WA's website here.

Demographic and trip details estimates are based on a two-year average to increase the sample size and hence improve the reliability of the data. Due to the small number of interstate and international visitors to WA in 2020 and 2021, these markets are based on an average of 2018 and 2019 (2018/19). The intrastate market is based on an average of 2020 and 2021 (2020/21) with comparisons to 2018 and 2019 (2018/19).

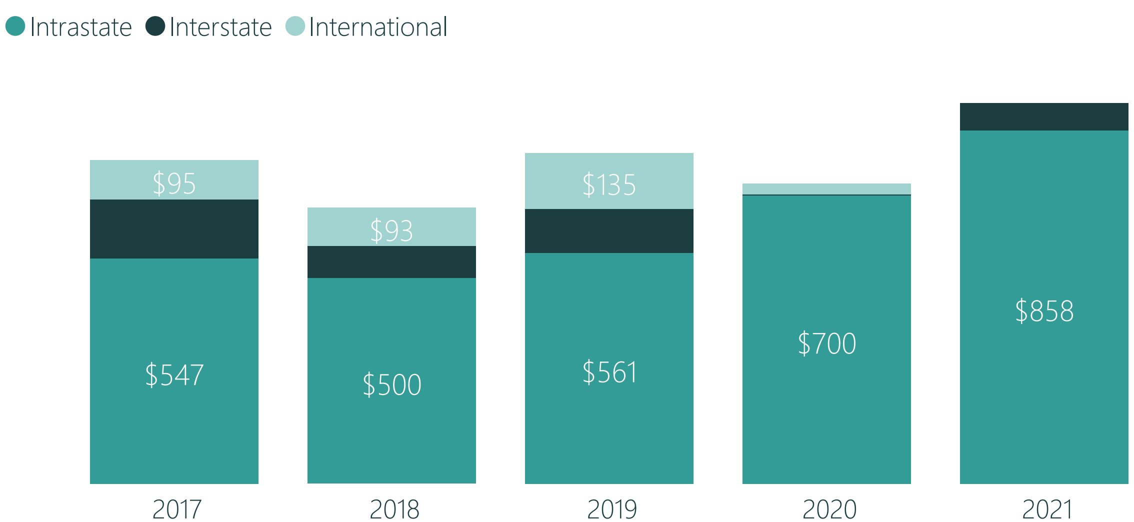
Overnight Visitor Summary 2021 - Australia's Coral Coast

The data in this factsheet refers to visitors who have spent at least one night in Australia's Coral Coast

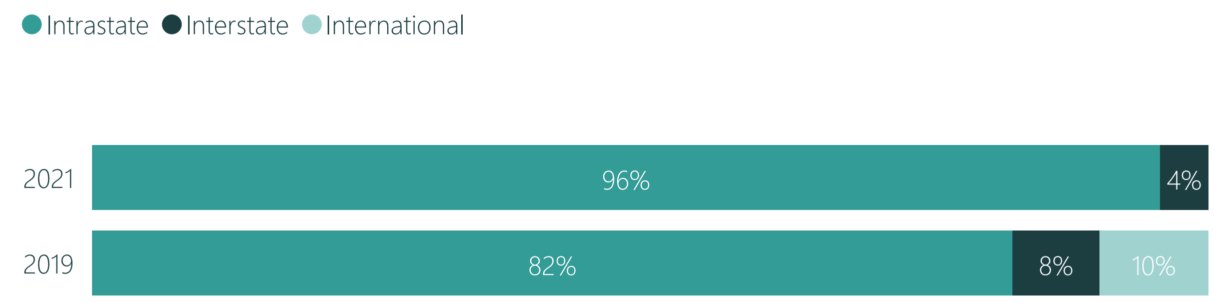
Overnight Visitors



Overnight Visitors Spend ($ millions)



Share of Overnight Visitors - change vs. pre-COVID



Overnight Visitor Metrics

	Avg. Trip Length 2021	Average Trip Spend 2021	Average Daily Spend 2021
Intrastate	4.7 Days	$806	$173
Total Domestic + International	4.9 Days	$830	$171

Additional visitor, nights and spend results can be found on the interactive chart on Tourism WA's website here.

International and interstate metrics are unable to be provided due to the small sample size.

Intrastate Overnight Visitor Details - Australia's Coral Coast

Two Year Average - 2020/21

The data in this factsheet refers to visitors who have spent at least one night in Australia's Coral Coast

Intrastate Visitors	Intrastate Nights
1,054,000	4,964,000
Annual Average 2020/21	Annual Average 2020/21

Purpose of Travel

	2020/21	2018/19
Holiday	64%	61%
VFR (Visiting Friends & Relatives)	16%	16%
Business	17%	20%
Other	5%	4%

Sum of purpose may add to more than 100% as overnight visitors can visit the Region for more than one reason.

Age

	15-19	20-34 years	35-49 years	50-64 years	65+ years
2020/21	7%	27%	26%	23%	17%
2018/19	6%	28%	27%	25%	14%

Travel Party

	Travelling alone	Couple	Family	Friends/relatives	Other
2020/21	17%	25%	20%	32%	6%
2018/19	22%	24%	16%	29%	9%

Length of Stay

	1 night - 3 nights	4 - 7 nights	8 - 14 nights	15 + nights
2020/21	52%	28%	13%	7%
2018/19	64%	22%	7%	7%

Top 3 Home Local Government Area (LGA)

Home LGA	2018/19	2020/21
Stirling	7%	9%
Joondalup	7%	8%
Wanneroo	6%	6%

Gender

	Female	Male
2020/21	47%	53%
2018/19	41%	59%

Definition

Domestic Visitors (Intrastate): Western Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home. Note, intra-regional travel is included, i.e. the home and stay may fall within the same region.

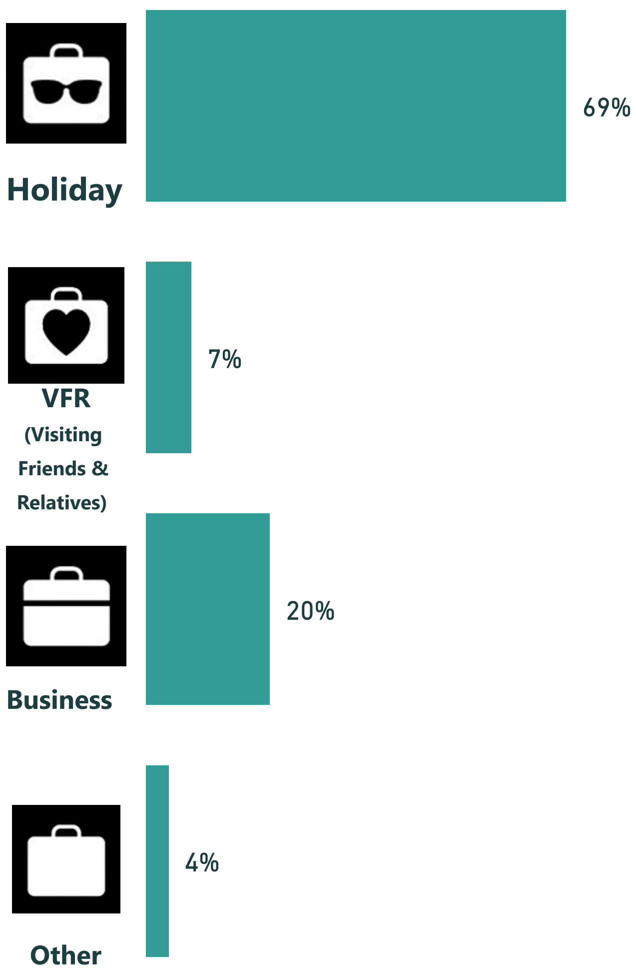
Interstate Overnight Visitor Details - Australia's Coral Coast

Two Year Average - 2018/19

The data in this factsheet refers to visitors who have spent at least one night in Australia's Coral Coast

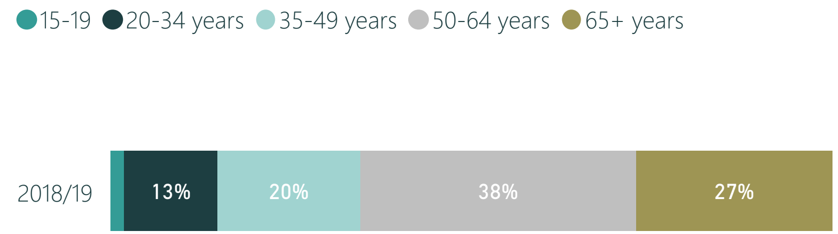
Interstate Visitors	Interstate Nights
81,000	614,000
Annual Average 2018/19	Annual Average 2018/19

Purpose of Travel

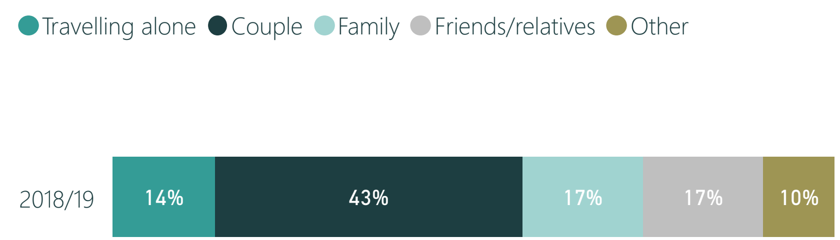


Sum of purpose may add to more than 100% as overnight visitors can visit the Region for more than one reason.

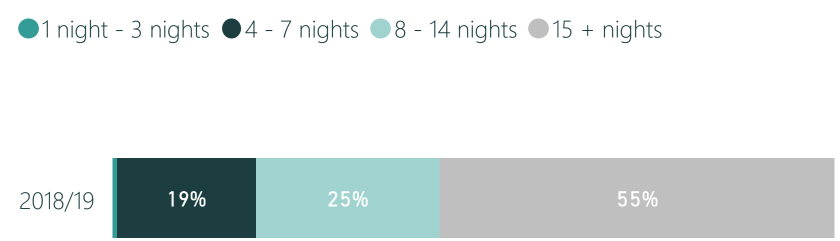
Age



Travel Party



Length of Stay



Top 3 Home State/Territory

Home State	2018/19
Victoria	27%
New South Wales	24%
Queensland	19%

Gender

Definition

Domestic Visitors (Interstate): Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home.

International Overnight Visitor Details - Australia's Coral Coast

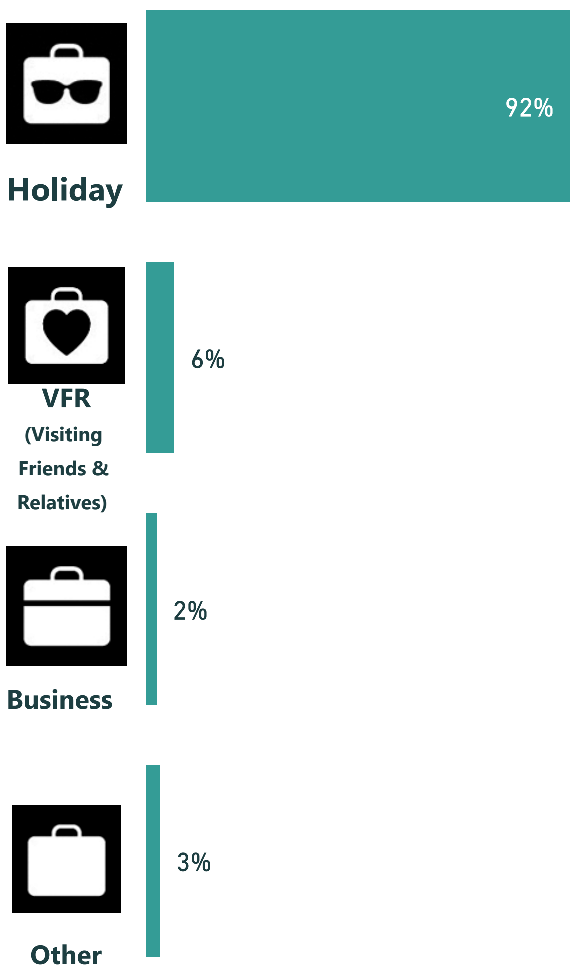
Two Year Average - 2018/19

The data in this factsheet refers to visitors who have spent at least one night in Australia's Coral Coast

International Visitors
99,000
Annual Average 2018/19

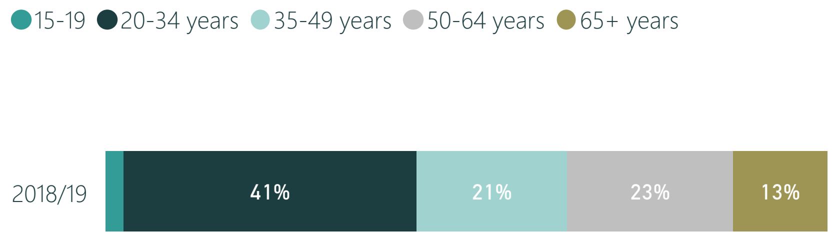
International Nights
1,054,000
Annual Average 2018/19

Purpose of Travel

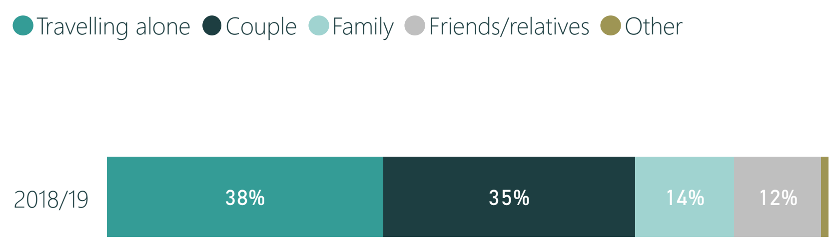


Sum of purpose may add to more than 100% as overnight visitors can visit the Region for more than one reason.

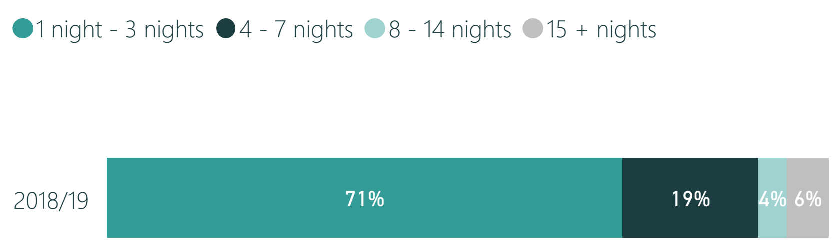
Age



Travel Party



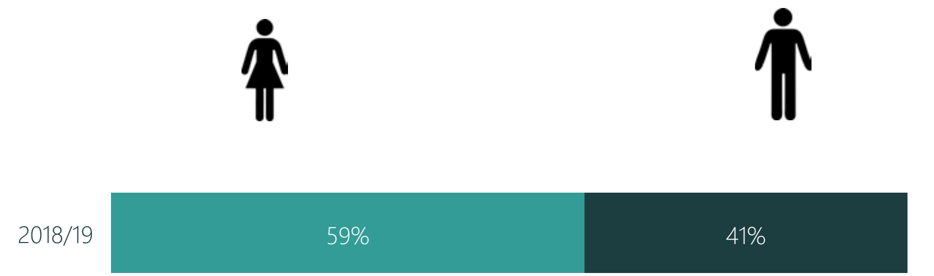
Length of Stay



Top 3 International Markets

Home Country	2018/19
United Kingdom	14%
Germany	12%
China	9%

Gender



Definition

International Visitors: aged 15 years and over who spent at least one night in the region and are staying in Australia for 12 months or less.

Domestic Overnight Visitor Details - Australia's Coral Coast

Two Year Average - 2020/21

The data in this factsheet refers to visitors who have spent at least one night in Australia's Coral Coast

Top 3 accommodation (% of nights) - Intrastate

Accommodation	2018/19	2020/21
Caravan park or commercial camping ground	28%	27%
Friends or relatives property	20%	16%
Caravan or camping - non commercial	11%	15%

Top 3 accommodation (% of nights) - Interstate

Accommodation	2018/19
Friends or relatives property	22%
In Transit - Not Stated/Not Asked	18%
Hotel/resort/motel or motor Inn	15%

Top 3 accommodation (% of nights) - International

Accommodation	2018/19
Caravan park or commercial camping ground	23%
Rented house/apartment/flat or unit	19%
Other Private Accommodation	18%

Top 3 activities - Intrastate

Activity	2018/19	2020/21
Go to the beach	51%	54%
Eat out / dine at a restaurant and/or cafe	52%	47%
Sightseeing/looking around	30%	27%

Top 3 activities - Interstate

Activity	2018/19
Eat out / dine at a restaurant and/or cafe	59%
Go to the beach	46%
Visit national parks / state parks	36%

Top 3 activities - International*

*International visitors may have undertaken the activity in the region or elsewhere in Australia

Activity	2018/19
Eat out / dine at a restaurant and/or cafe	94%
Go to the beach	90%
Sightseeing/looking around	89%

Top 3 Local Government Areas (LGA's) visited - Intrastate

LGA Visited	2018/19	2020/21
Greater Geraldton	23%	23%
Dandaragan	20%	21%
Gingin	18%	15%

Top 3 Local Government Areas (LGA's) visited - Interstate

LGA Visited	2018/19
Greater Geraldton	53%
Exmouth	38%
Northampton	31%

Top 3 Local Government Areas (LGA's) - International

LGA Visited	2018/19
Greater Geraldton	46%
Northampton	44%
Shark Bay	39%

Visitor Factsheet - Further Information

The data in this factsheet refers to visitors who have spent at least one night in Australia's Coral Coast

Important Note

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To increase the sample size and hence improve the reliability of the data, visitor and nights estimates in this document are based on an average of two calendar years.

The demographics and trip details for intrastate visitors have been updated to show comparisons between 2020/21 (current) and 2018/19 (pre-COVID). Due to the small number of international and interstate visitors to WA in 2020/21, only 2018/19 has been provided for these markets. It is hoped that in future revisions of this factsheet, it will be possible to compare international and interstate visitor demographics and trip details with pre-COVID.

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Definititions

Domestic Visitors (Intrastate): Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home. Note, intra-regional travel is included, i.e. the home and stay may fall within the same region.

Domestic Visitors (Interstate): Australian residents aged 15 years and over who spent at least one night at a place at least 40km from their home.

International Visitors: International visitors aged 15 years and over who spent at least one night in the Region and are staying in Australia for 12 months or less.

Sample Size and Confidence Intervals

Year	2018/19			2020/21		
Market	Sample size	95% Confidence Interval Visitors (±)	95% Confidence Interval Nights (±)	Sample size	95% Confidence Interval Visitors (±)	95% Confidence Interval Nights (±)
Intrastate	837	8%	12%	812	8%	10%
Interstate	82	27%	29%	29	44%	44%
Domestic	919	8%	11%	841	7%	10%
International	1,233	7%	19%			

Note: Estimates in this factsheet need to be considered within the Confidence Intervals in this table. Data has not been provided where the Sample Size is less than 40 or the Confidence Interval is greater than ±50%.

Source

Tourism Research Australia, National and International Visitor Surveys, 2021

Regional Tourism Satellite Account 2020-21

Topline Results for WA

Prepared by Tourism WA Insights and Planning
July 2022

Tourism WESTERN AUSTRALIA

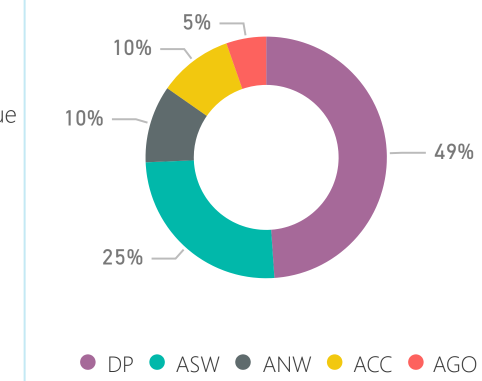
GOVERNMENT OF WESTERN AUSTRALIA

Regional Tourism Satellite Account (RTSA) 2020-21 - Gross Value Added (GVA)

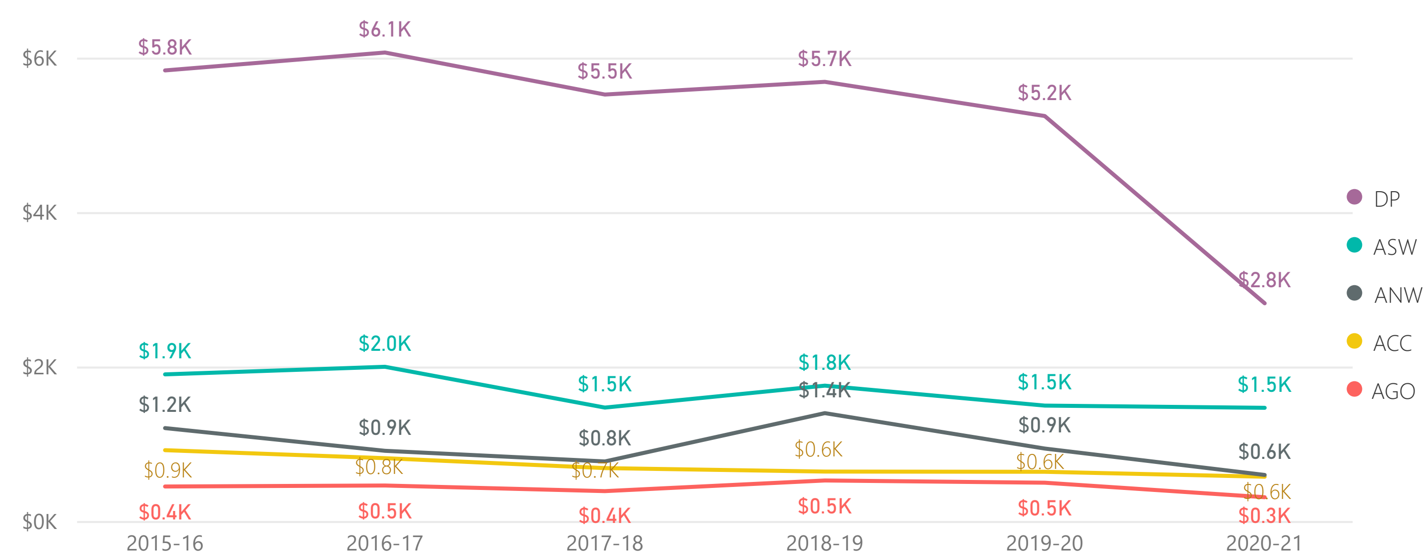
Region	Direct GVA ($m)	Direct GVA (% of total economy)	Total (Direct + Indirect) GVA ($m)	Total (Direct + Indirect) GVA (% of total economy)
Destination Perth (DP)	$1,626	0.7%	$2,819	1.3%
Australia's North West (ANW)	$336	0.5%	$597	0.8%
Australia's Coral Coast (ACC)	$309	4.1%	$573	7.5%
Australia's South West (ASW)	$748	4.0%	$1,466	7.8%
Australia's Golden Outback (AGO)	$157	0.5%	$308	0.9%
Regional Western Australia	$1,549	1.2%	$2,944	2.2%
Western Australia (WA)	$3,175	0.9%	$6,275	1.8%

- In 2020-21, tourism (direct + indirect) in WA was worth $6.3 billion by GVA, equivalent to 1.8% of WA's total GVA.
- In regional WA, tourism accounts for 2.2% of GVA compared to 1.3% in Destination Perth, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ACC and ASW where tourism accounts for 7.5% and 7.8% of GVA respectively.
- $0.47 in every $1 of WA's total (direct + indirect) tourism GVA is produced in regional WA.
- GVA in WA declined (-) 42% since 2018-19, impacted by COVID-19 and associated restrictions. ANW, DP and AGO saw the most significant declines (-57%, -50% and -41% respectively). ASW declined by (-) 16% and ASW by (-) 10%.

Total GVA Split by Region



Total GVA over Time



Gross value added (GVA) allows easier comparisons across industries. GVA is the labour income and capital revenue received by the industry from tourism and the net taxes government receives from production.

Direct contribution is money spent directly in the tourism industry - with no tourism industry this money wouldn't be generated, or these people wouldn't be employed.

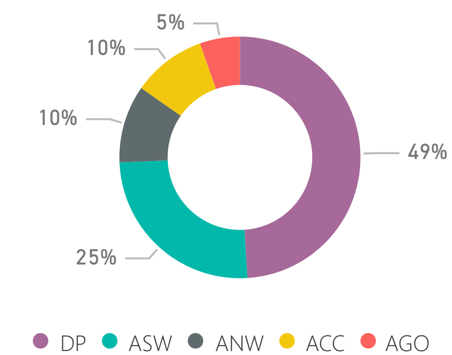
Indirect contribution is the flow-on effect of the tourism industry. In each of WA's regions, every dollar spent in the tourism industry, created additional value elsewhere in the economy.

Regional Tourism Satellite Account (RTSA) 2020-21 - Gross Regional Product (GRP)

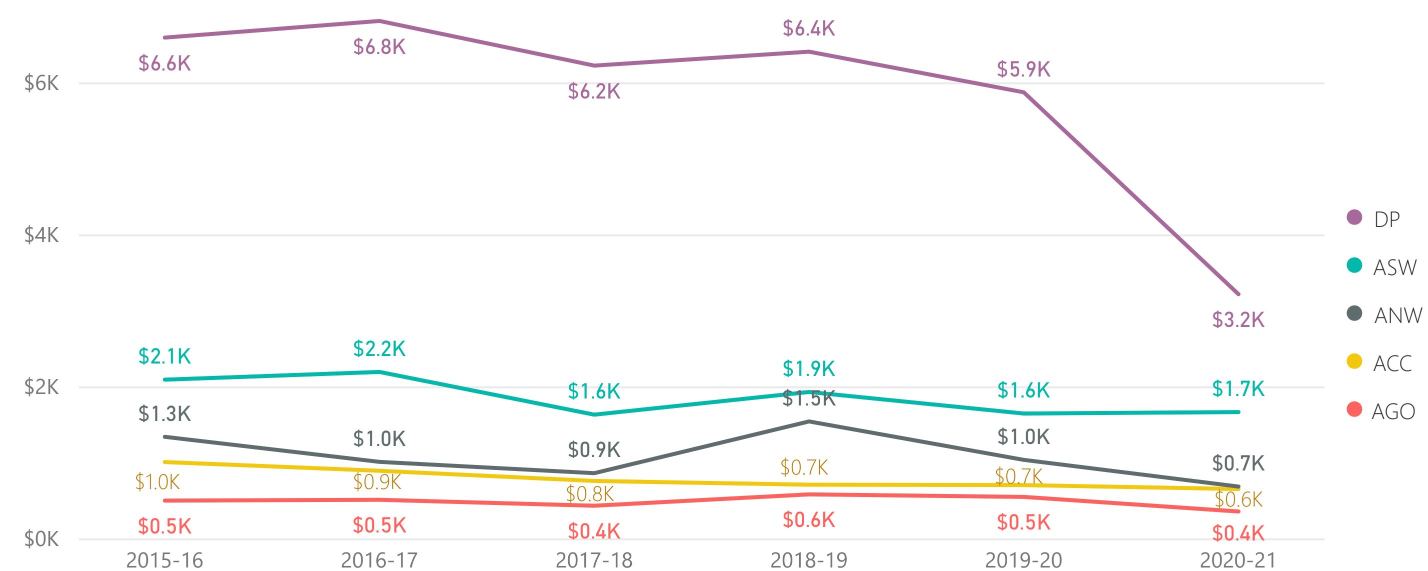
	Direct GRP		Total (Direct + Indirect) GRP	
Destination Perth (DP)	$1,813 $m	0.8% % of total economy	$3,211 $m	1.4% % of total economy
Australia's North West (ANW)	$375 $m	0.5% % of total economy	$681 $m	0.9% % of total economy
Australia's Coral Coast (ACC)	$337 $m	4.3% % of total economy	$648 $m	8.2% % of total economy
Australia's South West (ASW)	$818 $m	4.2% % of total economy	$1,661 $m	8.5% % of total economy
Australia's Golden Outback (AGO)	$174 $m	0.5% % of total economy	$352 $m	1.0% % of total economy
Regional Western Australia	$1,704 $m	1.3% % of total economy	$3,341 $m	2.5% % of total economy
Western Australia (WA)	$3,517 $m	1.0% % of total economy	$7,154 $m	2.0% % of total economy

- In 2020-21, tourism (direct + indirect) in WA was worth $7.2 billion by GRP, equivalent to 2.0% of WA's total GRP.
- In regional WA, tourism accounts for 2.5% of GRP compared to 1.4% in Destination Perth, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ACC and ASW where tourism accounts for 8.2% and 8.5% of GRP respectively.
- $0.47 in every $1 of WA's total (direct + indirect) tourism GRP is produced in regional WA.
- GRP in WA declined (-) 50% since 2018-19, impacted by COVID-19 and associated restrictions. ANW, DP and AGO saw the most significant declines (-56%, -50% and -39% respectively). ASW declined by (-) 14% and ACC by (-) 8%.

Total GRP Split by Region



Total GRP over Time



Gross regional product (GRP) allows easier comparisons across industries. GRP is GVA plus net taxes.

Direct contribution is money spent directly in the tourism industry - with no tourism industry this money wouldn't be generated, or these people wouldn't be employed.

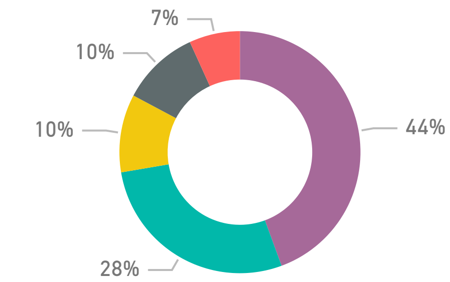
Indirect contribution is the flow-on effect of the tourism industry. In each of WA's regions, every dollar spent in the tourism industry, created additional value elsewhere in the economy.

Regional Tourism Satellite Account (RTSA) 2020-21 - Employment

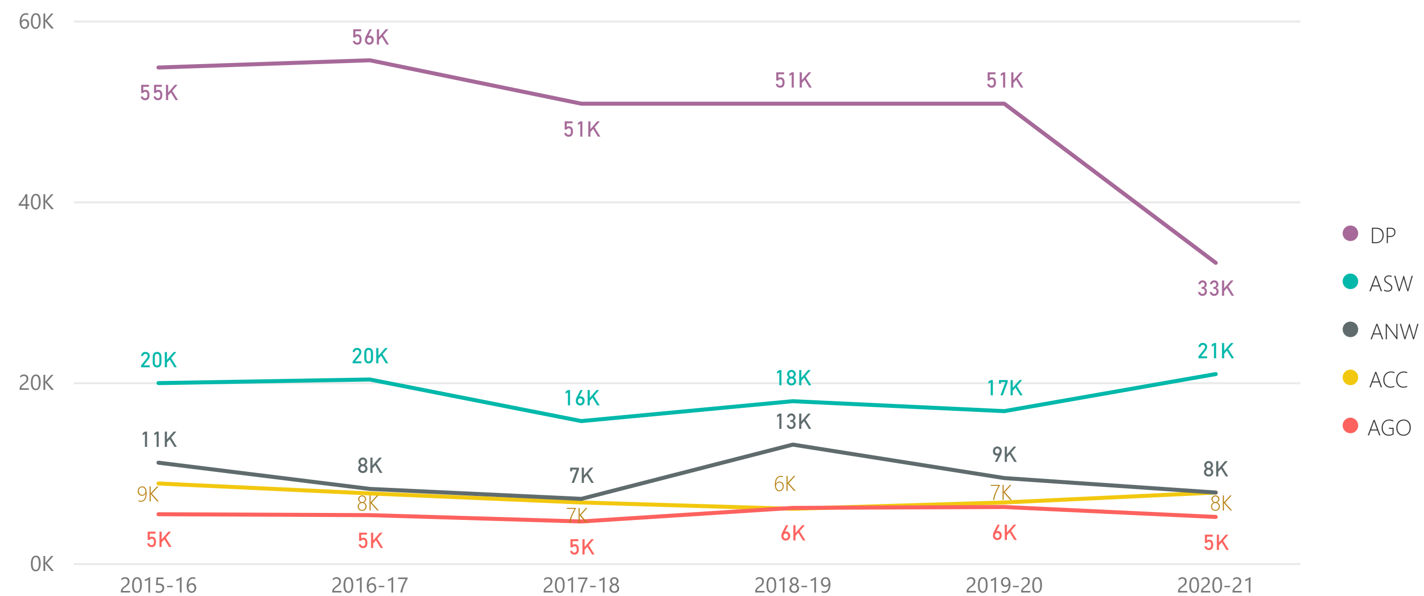
Region	Direct Employment: Persons	Direct Employment: % of total economy	Total (Direct+Indirect) Employment: Persons	Total (Direct+Indirect) Employment: % of total economy
Destination Perth (DP)	24,800	2.3%	33,200	3.1%
Australia's North West (ANW)	6,000	6.7%	7,800	8.8%
Australia's Coral Coast (ACC)	5,900	17.0%	7,800	22.4%
Australia's South West (ASW)	15,700	13.8%	20,900	18.4%
Australia's Golden Outback (AGO)	4,000	6.5%	5,100	8.3%
Regional Western Australia	31,500	10.6%	41,700	14.0%
Western Australia (WA)	56,300	4.1%	78,400	5.7%

- In 2020-21, WA's tourism industry (directly + indirectly) employed 78,400 people in WA, equivalent to 5.7% of WA's total employment.
- In regional WA, tourism accounts for 14.0% of employment compared to 3.1% in DP, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ACC and ASW where tourism accounts for 22.4% and 18.4% of employment respectively.
- More than half of all persons employed in WA's tourism industry are based in Regional WA.
- Tourism employment in WA declined (-) 35% since 2018-19, impacted by COVID-19 and restrictions. ANW, DP and AGO all saw a decline (-40%, -35% and -16% respectively). ACC and ASW grew by 30% and 17% respectively.

Total Employment by Region



Total Employment over Time



Employed person is aged 15+ who, during the reference week, worked for one hour + for pay (or similar) in a job, a business or on a farm, or without pay in a family business or farm.

Direct contribution is money spent directly in the tourism industry - with no tourism industry this money wouldn't be generated, or these people wouldn't be employed.

Indirect contribution is the flow-on effect of the tourism industry. In each of WA's regions, every dollar spent in the tourism industry, created additional value elsewhere in the economy.

Regional Tourism Satellite Account (RTSA) 2020-21 - Further Information

About this report

The Regional Tourism Satellite Accounts (RTSA) highlights the importance of tourism to the economy of each tourism region across Australia. The RTSA measures the direct and indirect impact of tourism across a number of measures including Gross Regional Product (GRP), Gross Value Added (GVA), and employment. The RTSA is based on the same inputs and principles used for the State Tourism Satellite Accounts, also developed by TRA. It should be noted that the sum of tourism regions will not always equate to total Western Australia, due to indirect effects of tourism consumption in Western Australia's tourism regions that are not allocated to a specific tourism region.

A recurring feature of the RTSA is that historical estimates for previous years are revised to reflect revisions to input data, such as changes in Australian Bureau of Statistics National Accounts data. TRA makes changes to previous time series estimates as required in each RTSA release, therefore the historic data presented in this report (for years 2015-16 to 2019-20) differs from that published in the 2019-20 report.

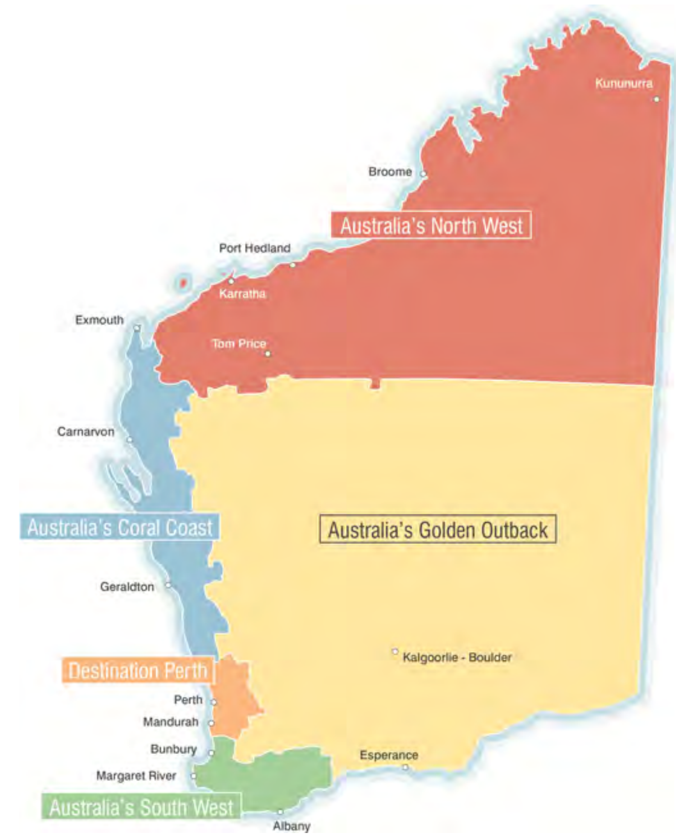
This report summarises key findings for Western Australia's five tourism regions from the 2020-21 RTSA, and is considered the most recent and accurate data on tourism's contribution to the WA economy. In this report, "Regional WA" is defined as all tourism regions excluding Destination Perth. For more information on the RTSA, and to access reports and data tables for each tourism region in Australia, visit TRA's website.

Source and further information

All data presented in this report is sourced from Tourism Research Australia's (TRA) Regional Tourism Satellite Accounts 2020-21. For more information on the RTSA, and to access reports and data tables for each tourism region in Australia, visit TRA's website.

For any queries about this summary, please contact the Tourism WA Insights and Planning team via research@westernaustralia.com.

Western Australia's Tourism Regions



Regional Development Australia

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January 2021

Wheatbelt Tourism Economic Briefing Paper

The information presented in this paper is for 14 individual Wheatbelt Shires that had expenditure data available on the Tourism Research Australia, Local Government Area Profiles website for the period November 2019 to November 2020. International and domestic expenditure data was only available for the Shires of Dandaragan, Gingin, Kondinin, Northam and York (yellow stars in Figure 1). Domestic expenditure data was available for the Shires of Beverley, Chittering, Dalwallinu, Lake Grace, Merredin, Moora, Narrogin, Toodyay and Yilgarn (orange stars in Figure 1).

Figure 1. Wheatbelt region Local Governments

Executive Summary

- Tourism expenditure based on economic data of the 14 shires derived from National Visitor Survey Monthly Snapshot (2020), amounted to $387 Million in 2019-2020. This comprised $355 million of domestic and $32 million of international expenditure.
- In the 12-month period up until the COVID lockdown of international borders International visitation to the Shires of Dandaragan, Gingin, York, Northam and Kondinin accounted for:
    - 58,000 international visitors
    - 262,000 international visitor nights
    - $32 million of international expenditure
- Closure of international borders may have resulted in the loss of between 200 and 226 jobs based on the either a job created for every $141,600 in tourism consumption; or a job generated for every 283.5 visits.
- There were 836 tourism businesses in the Wheatbelt including 30 with 20 or more employees.
- The five shires with an international market had 60% of the Wheatbelt's tourism businesses with 20 or more employees.
- Of the 14 shires with the relevant available data in the National Visitor Survey Monthly Snapshot (2020), the Shires of Narrogin, Beverley, York, Northam, Toodyay, Chittering, Gingin and Dandaragan accounted for:
    - 91% of domestic visitors
    - 81% of international visitors
    - 81% of domestic nights
    - 89% of international nights
    - 50% of the region's tourism businesses
    - 53% of the region's tourism businesses with 0 employees
    - 46% of the region's tourism businesses with 1-4 employees
    - 47% of the region's tourism businesses with 5-19 employees
    - 70% of the region's tourism businesses with 20 or more employees.

Economic comparisons between geographical locations

The 14 shires with expenditure data were separated into two groups, the Western shires comprising, Narrogin, Beverley, York, Northam, Toodyay, Chittering, Gingin and Dandaragan; and the Northern and Eastern shires of Dalwallinu, Moora, Kondinin, Lake Grace, Merredin and Yilgarn.

Major differences between the two regions include:

- A higher level of average revenue per businesses in the Western shires of just over $800,000 compared to the Northern and Eastern shires of $300,000.
- A higher percentage of the Western Shires 15-64 years labour force (15%) employed in the tourism sector compared to the Northern and Eastern Shires (12%).
- A higher percentage of the Western Shires 15-24 years work force (20%) employed in the tourism sector compared to the Northern and Eastern Shires (15%).
- A significantly higher percentage of the Western Shires 15-24 years labour force (30%) employed in the tourism sector compared to the Northern and Eastern Shires (18%).

These figures indicate the importance of the tourism sector to regional employment and more so, the importance of the tourism sector employment of the Wheatbelt's 15-24 years population.

International Market

Prior to COVID, international and domestic visitation to the Wheatbelt Region in 2019 was approximately worth $387 million with the International expenditure being valued at approximately $32 million. Therefore, it would be reasonable to propose that the closure of international borders in 2020 resulted in an at least immediate 8% decrease of the region's tourism revenue. While anecdotal evidence suggests that there has been increased domestic visitation to the Wheatbelt during the remainder of 2020 and the 2021 holiday period, it remains to be seen if this has offset the loss of the international expenditure as well as creating issues around labour availability and capacity to adequately deliver tourism services.

The international expenditure was driven by around 58,000 visitors of which just over 37,000 spent an average of seven nights in the region spending an estimated $213 per day on food and accommodation. Overall, the average trip spend for all International visitors to the region was $482 which was comparatively higher than the domestic visitor trip spend of $238.

There were 17 international markets that comprised the top three markets across 32 shires. Overall, the largest international market was the UK with it being in the top three of 28 shires followed by NZ (18 shires), Germany (14 shires) and Switzerland in the top three of 12 shires. The other international market volume segments were:

- Singapore and the Netherlands - 6 shires
- China- 4 shires
- Canada, USA, Malaysia, Scandinavia and France- 3 shires
- Japan and Taiwan– 2 shires
- India, Hong Kong and Italy- 1 shire

International Tourism service sectors

In the five shires with available international data, there were 273 designated tourism businesses of varying sizes. These businesses comprised 31% of the Wheatbelt's 836 designated tourism businesses. The breakdown across business size by employees, shows that the five shires with available international expenditure data had 60% of the region's tourism businesses with 20 or more employees (Figure 2).

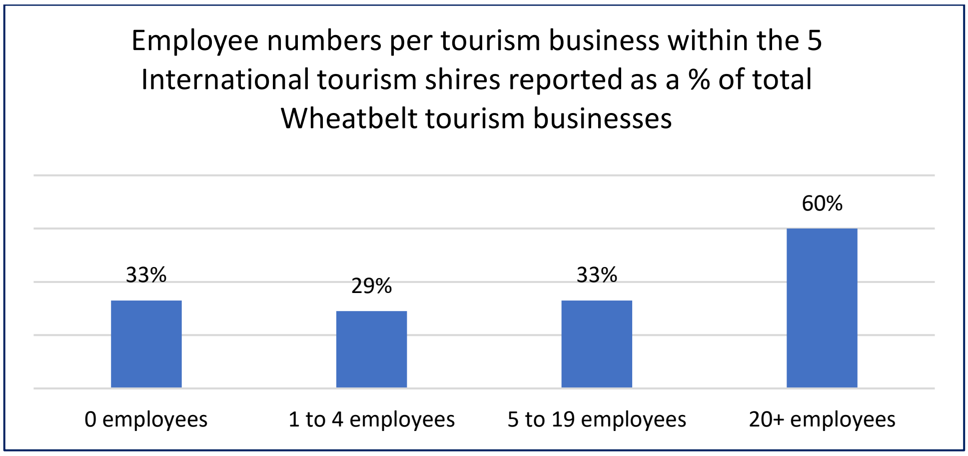


Figure 2: Employee numbers per tourism business within the 5 International tourism shires reported on as a percentage of total number of tourism businesses in the Wheatbelt.

In comparison, there were only four out the remaining 37 shires that had multiple businesses with 20 or more employees. These were, Chittering, Lake Grace, Merredin and Toodyay with three of these size businesses in each shire.

It could be anticipated that a proportion of the businesses with 20 or more employees in the international market shires came under economic duress when the inward bound borders were closed. Additionally, anecdotal evidence derived from some of these businesses in both the international and domestic markets indicated that there were difficulties in accessing labour when the regional border lockdown was lifted. One business owner attributed such issues primarily to the reduction in the availability of international backpackers and a reticence of casual employees who were eligible for Government financial support to return to casual employment.

Impacts of loss of international tourism expenditure

The loss of the international market expenditure would have had varying degrees of impacts on the five shires with available data relative to the individual shire's tourism sector's exposure to the international market and the strength of their domestic market. For instance, international markets expenditure made up over a quarter of Kondinin's tourism revenue and 19% of Dandaragan's (Figure 3).

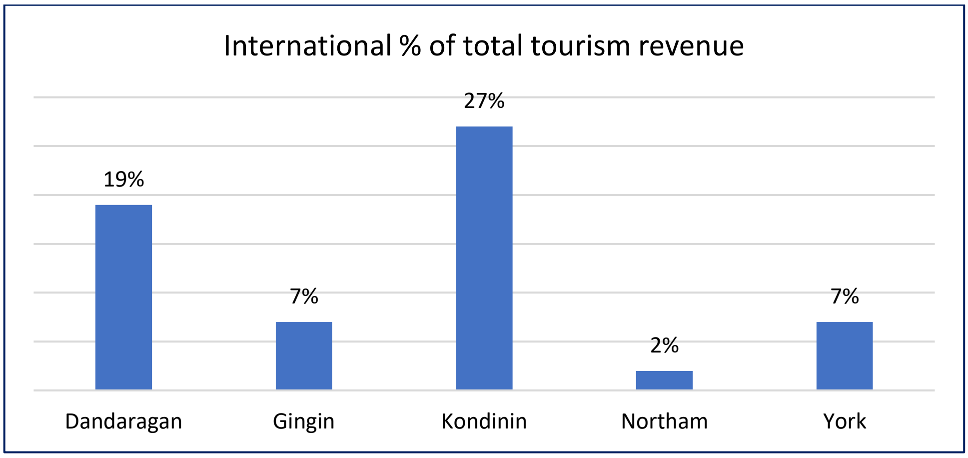


Figure 3: International expenditure as a % of ttoal tourism revenue

However, further examination shows that the Shire of Kondinin's tourism sector's exposure to the international market was more deleterious than the other shires due to the low domestic tourism revenue stream of $8 million which was just $5 million more than its international revenue stream. In comparison, while the Shire of Dandaragan's tourism sector faced a much greater loss of $19 million of international expenditure, it had a relatively solid foundation of $83 million of domestic tourism expenditure that would have somewhat alleviated the impacts of the international expenditure loss.

A critical element associated with the loss of the international expenditure of $32 Million is the direct impact it would have had on employment. According to a Tourism and Transport Forum (T&TF) Report (2018)[1], a single tourism job in WA is generated for every $141,600 in tourism consumption. Additionally, the report indicated that in WA a single tourism-related job is generated for every 283.5 visits.

In effect it could be proposed that the loss of the international expenditure equated to the potential to put at risk or terminate 226 employment positions in the Wheatbelt's tourism sector. Alternately using the tourism job generation per set number of trips suggests that 200 jobs may have been put at risk or terminated with the loss of the international tourist dollar.

Added to the adverse impact on employment in the region's tourism sector is the negative effect the loss of the international expenditure has in terms of tax contributions and contributions to the GDP. The T&TF report proposed that for every $1 Million in tourism consumption that generates 7.1 tourism jobs in WA,

[1] STAFFORD STRATEGY (2018). TOURISM: SUPERCHARGING AUSTRALIA'S FUTURE. Report for Tourism and Transport Forum. 7 MACQUARIE PLACE, SYDNEY NSW 2000

there is a tax contribution component of almost $80,000 and a $725,000 contribution to GDP. Based on these formulas it is reasonable to assume that there is a tax contribution shortfall of $2.5 Million and a GDP contribution loss of $23.2 Million.

Domestic tourism market trend

While anecdotal visitor evidence drawn from the Wheatbelt and high levels of caravan and camper sales indicated that the domestic visitor market had shown an increase in trips, Tourism Research Australia November 2020 Snapshot[2] showed that the numbers of visitors in regional WA had fallen by 35,000 between November 2019 and November 2020.

Additionally, the number of nights spent in regional areas had decreased by 430,000 which represented a 15% decline. However, despite these falls, there was only a decrease of $1 million in the expenditure in November 2020 compared to the same time in 2019.

Western Wheatbelt shire tourism economic profile

Data indicates that the primary area of visitation in the Wheatbelt are the eight shires located in the western regions running in a general north/south line and include the Shires of Narrogin, Beverley, York, Northam, Toodyay, Chittering, Gingin and Dandaragan.

Of the 14 shires with the relevant available data in the National Visitor Survey Monthly Snapshot (2020), these eight shires accounted for:

- 91% of domestic visitors
- 81% of international visitors
- 81% of domestic nights
- 89% of international nights
- 50% of the region’s tourism businesses[3]
- 53% of the region’s tourism businesses with 0 employees
- 46% of the region’s tourism businesses with 1-4 employees
- 47% of the region’s tourism businesses with 5-19 employees
- 70% of the region’s tourism businesses with 20 or more employees.

These levels of visitation and numbers of businesses contributed to the eight shires accounting for 89% of domestic tourism expenditure and 90% of international expenditure out of the 14 shires with available data. A shire-by-shire analysis of the region’s eight western shires shows high levels of domestic and international activity in the Shires of Dandaragan and Gingin with a lower level of international activity in the Shires of York and Northam (Figure 4).

Alternately, the Shires of York, Northam and Toodyay exhibited healthy levels of domestic visitation activity but there were more subdued levels of visitation in the southern Shires of Beverley and Narrogin although Narrogin did record a reasonable degree of domestic expenditure that was comparative with the Shires of Toodyay and Chittering.

[2] NATIONAL VISITOR SURVEY MONTHLY SNAPSHOT, November 2020 Monthly results of the National Visitor Survey (NVS) | Tourism Research Australia

[3] Numbers of tourism businesses were available for all Wheatbelt Shires in the NATIONAL VISITOR SURVEY MONTHLY SNAPSHOT, November 2020 Monthly results of the National Visitor Survey (NVS) | Tourism Research Australia

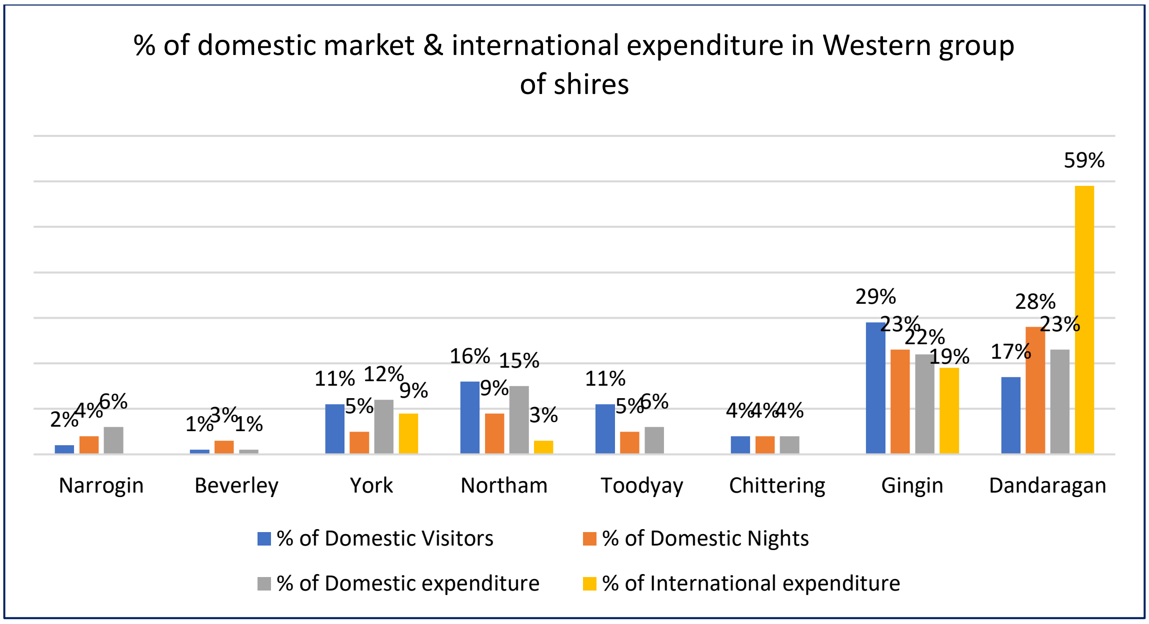


Figure 4. Percentage of domestic and international expenditure in eight western wheatbelt shires

Conversely, the six remaining shires which are in the Northern and Eastern inland areas of the Wheatbelt had a much lower share of the domestic market with only Kondinin registering a level of international expenditure due primarily to Wave Rock in Hyden (Figure 5).

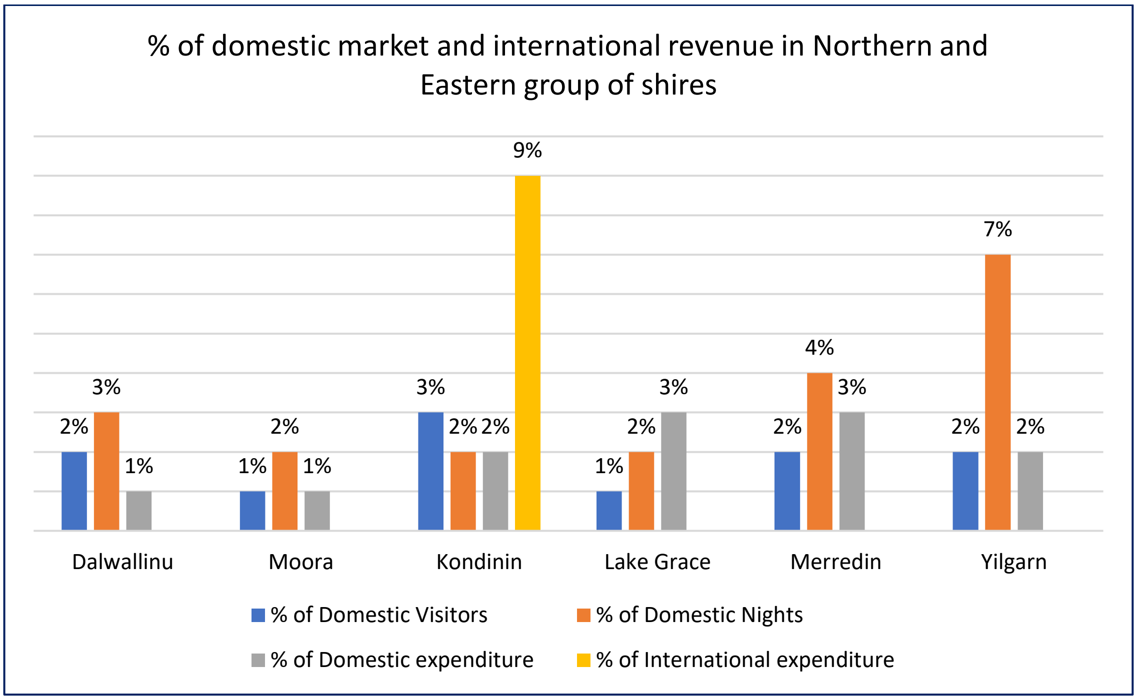


Figure 5. Percentage of domestic and international expenditure in the northern and eastern group of shires

The effect of the lower share of the domestic and international market in the Northern and Eastern shires is further demonstrated when comparisons in average revenue across businesses are made between those shires and the Western group with the Western businesses averaging just over $500,000 more than the Northern and Eastern business (Table 1).

Also of note is the effect international expenditure has on the averages with the businesses in the five shires with international expenditure averaging well above the shires with only domestic expenditure.

Table 1. Number of tourism businesses and average revenue

Western Shires	Number of tourism businesses	Average of revenue per business	Northern & Eastern Shires	Number of tourism businesses	Average of revenue per business
Narrogin	62	$370,967	Dalwallinu	22	$136,363
Beverley	16	$250,000	Moora	34	$117,647
York*	41	$1,073,170	Kondinin*	18	$611,111
Northam*	105	$504,762	Lake Grace	26	$346,153
Toodyay	41	$512,195	Merredin	33	$272,727
Chittering	45	$288,888	Yilgarn	19	$315,789
Gingin*	57	$1,491,228			
Dandaragan*	52	$1,961,538			
total	**419**		**total**	**152**	
average	**52**	**$806,594**	**average**	**25**	**$299,965**
**Denotes international and domestic expenditure*					

Table 2. Tourism and allied tourism related employment[4]

Western group of shires	% of the total labour force employed in tourism workforce aged 15-64 yr old	% of the tourism work force made up of 15-24 yr olds	% of 15-24 labour force in tourism jobs	Northern & Eastern group of shires	% of the total labour force employed in tourism workforce aged 15-64 yr old	% of the tourism work force made up of 15-24 yr olds	% of 15-24 labour force in tourism jobs
Narrogin	16%	19%	25%	Dalwallinu	9%	5%	4%
Beverley	10%	13%	18%	Moora	14%	18%	23%
York	18%	21%	39%	Kondinin	16%	0%	0%
Northam	15%	23%	29%	Lake Grace	8%	5%	6%
Toodyay	25%	22%	56%	Merredin	17%	22%	28%
Chittering	11%	25%	28%	Yilgarn	2%	0%	0%
Gingin	13%	15%	20%				
Dandaragan	18%	17%	34%				
Average	**15%**	**20%**	**30%**	**Average**	**12%**	**15%**	**18%**

[4] This employment data was drawn from ABS 2016 Census of Population and Housing, General Community Profile by LGA. Table G-51, Industry of Employment by Age and Sex and Table G-43, Labour Force Status by Age and Sex. As ABS data does not include tourism specific employment, analysis of associated tourism sectors such as food, fuel and beverage retail and accommodation and food were used.

As would be expected, the higher levels of visitor activity and expenditure in the group of eight Western shires is reflected in higher percentages of tourism and allied tourism employment as a proportion of labour force participation compared to the six Northern and Eastern Shires (Table 2).

This is particularly the case for the 15-24 years population with significantly more of the labour force in the Western group of shires employed in tourism associated businesses than the Northern and Eastern Shires.

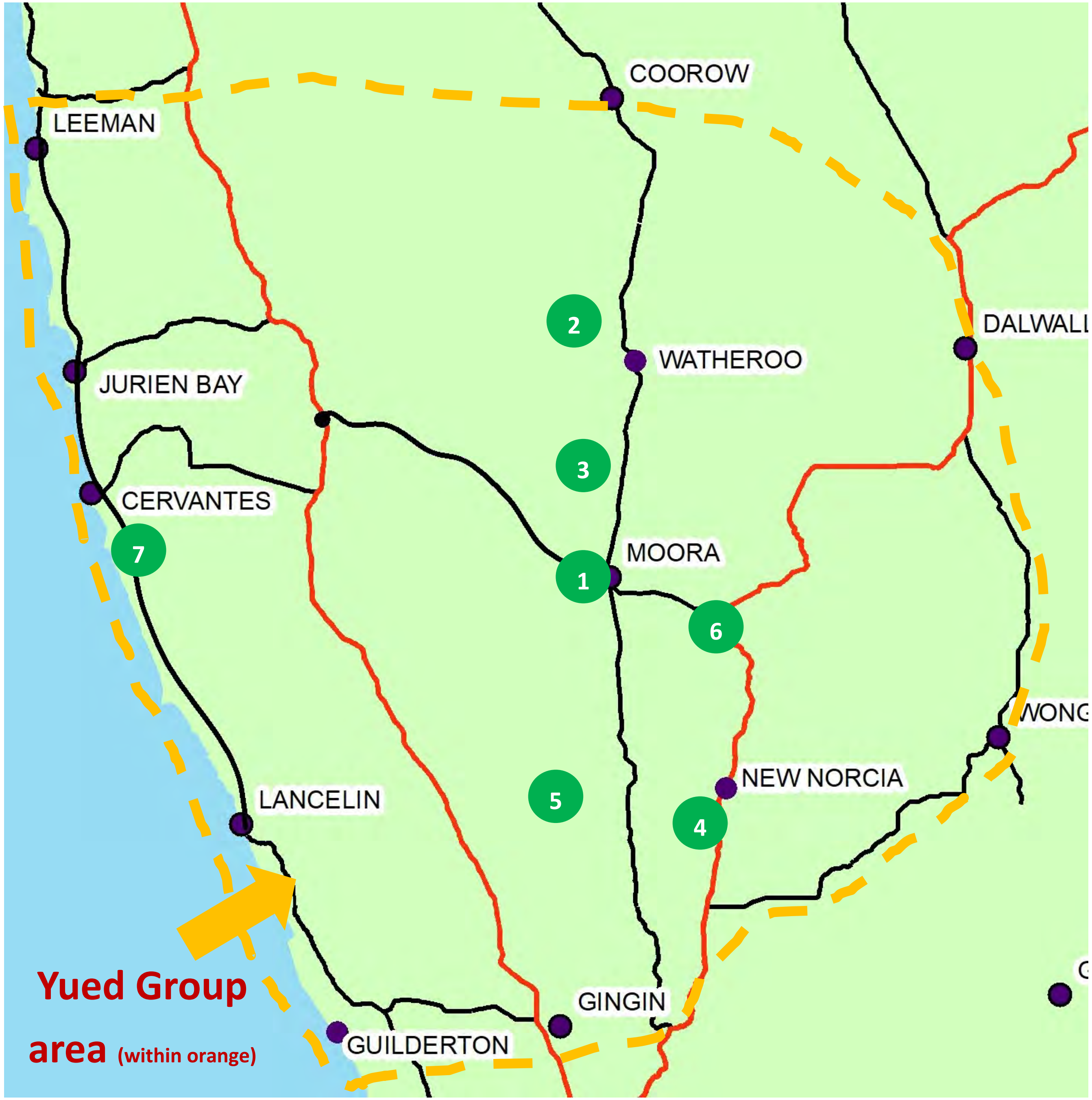
The relatively high levels of employment within the tourism sector of both the 15-64 years and 15-24 years labour forces indicates the importance the sector holds as an employment option in the Wheatbelt region.

Conclusion

- Tourism is an important part of the Wheatbelt economy. Total tourism expenditure across the 14 shires in this report was $387 million, of this only 8% was derived from international expenditure.
- There are 836 tourism businesses in the Wheatbelt and 30 of these employ more than 20 people.
- COVID travel restrictions have had an impact on the region. Closure of international borders may have resulted in the loss of 200-226 jobs.
- Exposure to the impacts of COVID travel restrictions were higher in shires such as Kondinin where 27% of the visitor market was international with a visitor spend of $3 million; and in Dandaragan where 19% of the visitor market was international with a visitor spend of $19 million. However, Dandaragan had a greater domestic visitor spend of $83 million which would have alleviated the impact of the loss of international spend.
- In the Wheatbelt tourism is an important employer of youth aged 15-24. Across the 8 Western group of shires one third of youth are employed in the tourism sector. Toodyay in particular has 56% of 15-24 year old labour force employed in the tourism sector.
- The shires of Narrogin, Beverley, York, Northam, Toodyay, Chittering, Gingin and Dandaragan accounted for 81% of international visitors and 91% of domestic visitors to the 14 shires analysed in the National Visitor Survey Monthly Snapshot (Nov 2019-Nov 2020).
- The average spend for international visitors was $482 compared to the domestic visitor average trip spend of $238.

Yued Cultural tour locations & suggested activities

developed in conjunction with Moora Elder red Mogridge



1 Moora

- **Old reserve** (Old Aboriginal camp housing 300 people, stories, walk with Elders, bush foods, astrotourism)
- **Candys Bush reserve** (Nature reserve/old Aboriginal camp, Carnaby breeding)
- **Big Carnaby sculpture & Carnaby's Cockatoo walk trail** (Carnabys Noongar Totem bird stories, cultural stories, walk with Elders)

2 Watheroo

- **Jingemia Cave** (Spirit site, Bush tucker/ medicine discovery)

3 Dalaroo

- **Dalaroo reserve** (Old Aboriginal camp, Bush tucker/medicine discovery)

4 New Norcia

- **New Norcia mission** (Old mission, history, stories)

5 Mogumber Moore River Settlement

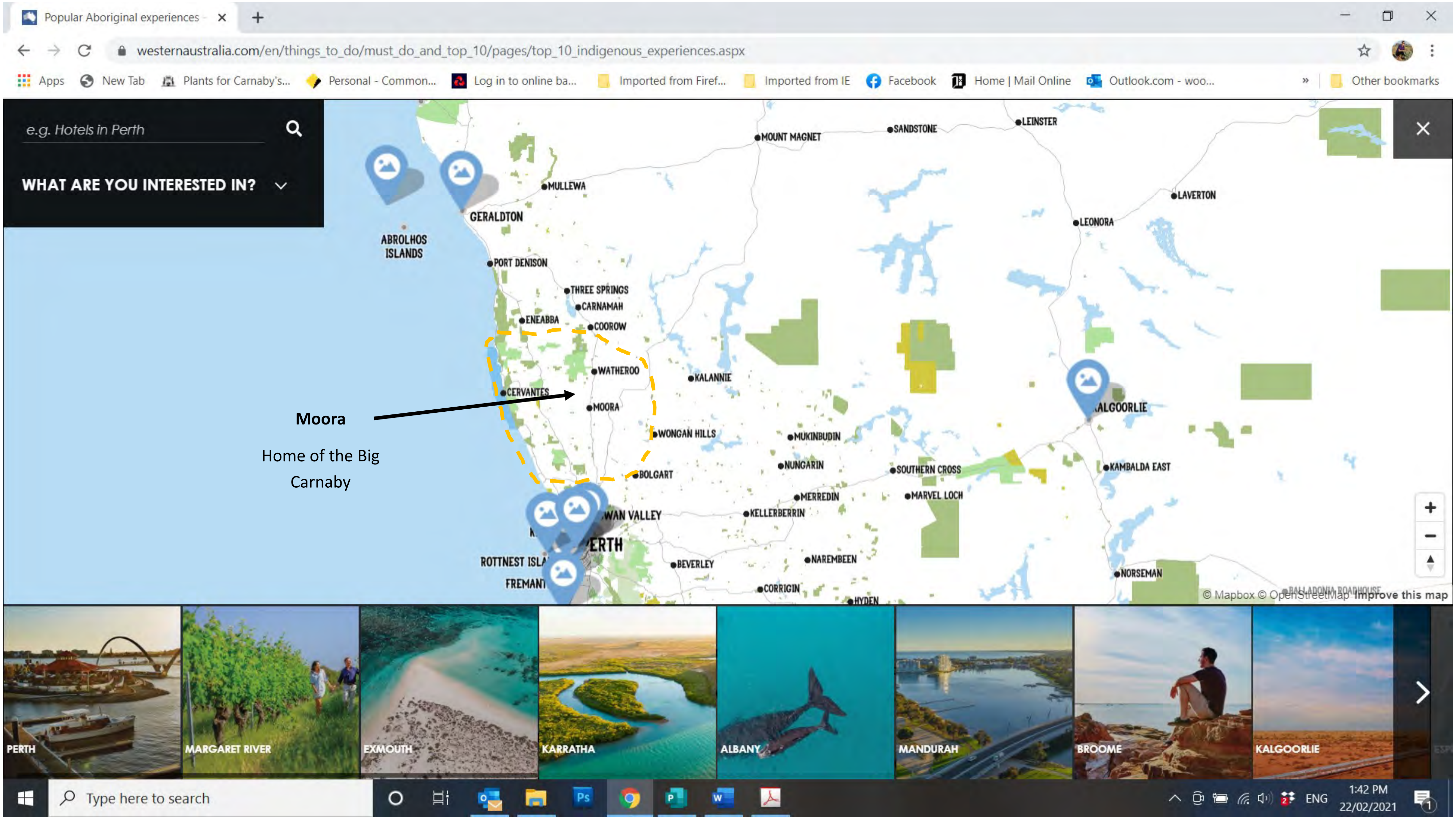
- **Mogumber Mission** (Old mission, history, stories, bush tucker/medicine discovery)

6 Walebing

- **Walebing reserve** (Old birthing site, history, stories, bush tucker/medicine discovery)

7 The Pinnacles

- **The Pinnacles** (Rock formations, creation stories, walk with Elders) https://www.westernaustralia.com/en/things_to_do/must_do_and_top_10/pages/top_10_indigenous_experiences.aspx



There are no Aboriginal Cultural Tour experiences between Perth and Geraldton on Yued country.

There are currently no Yued Group Aboriginal cultural experience tour operators.

There is huge potential for a Yued Aboriginal Tour operation to commence when more tourists visit Moora because of the new BIG Carnabys sculpture

31 May 2023

Rachel Walmsley
Moore Catchment Council
PO Box 337
Moora WA 6510

To Whom It May Concern

Letter of Support: Moora Big Carnaby Sculpture

I am pleased to write in support of the Moore Catchment Council to build a Big Carnaby Sculpture.

Australia's Golden Outback (AGO) is a peak Regional Tourism Organisation with key objectives of marketing and developing the region, covering some 54% of Western Australia, to intrastate, interstate and international visitors which includes Moora. Our mission is to increase visitor numbers to the region, extend the average length of stay and encourage visitor spending.

Public art initiatives, examples including the Mandurah Giants, Public Silo Art Trail and the Wellington Dam Mural, are important drivers to increase in visitation numbers in regional destinations. They provide a point of interest to capture tourists to an area.

The addition of a "Big" Carnaby sculpture will help to diversify Moora's tourist product and encourage visitors to deviate off the Indian Ocean Drive and travel the inland route when heading north or south. By creating this point of interest, the sculpture will benefit not just the town of Moora, but also the surrounding Wheatbelt towns. We understand that there are further opportunities for the local community to be involved, including local Yued tourism opportunities.

We commend the Moore Catchment Council and Kerkhoff Carnaby Group for raising the required funds to complete this project, and look forward to including the Big Carnaby in our marketing materials once the project is completed.

Should you have any queries, please contact me at ceo@goldenoutback.com.

Yours sincerely

Marcus

Marcus Falconer
Chief Executive Officer

Regional Development Australia
WHEATBELT WA

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Ms Rachel Walmsley
Moore Catchment Council
20 Roberts Street
PO Box 337
Moora WA 6510

20 June 2023

Dear Rachel

LETTER OF SUPPORT – Moore Catchment Council Carnaby Cockatoos Sculpture

Regional Development Australia (RDA) Wheatbelt is pleased to provide its support for the Moore Catchment Council and Kerkof Carnaby Group sculpture project in creating two 7.5 meter high Carnaby Cockatoos perched on a giant tree branch, with the intention that the icon will become a tourism attraction.

RDA Wheatbelt is part of the RDA national network of 52 Committees. In its role, RDA Wheatbelt supports 42 local governments comprising 75,000 people largely dispersed in over 200 communities across 156,000 square kilometres. RDA Wheatbelt works with all levels of government, regional businesses, investors, and community groups to support economic and social development of the Region.

We support the aim of the sculpture to increase the overall number of tourists to Moora as well as lengthening the tourist season. Currently the peak tourism period is July-Oct/Nov as it coincides with the wildflower season.

RDA Wheatbelt's support of this project is not just founded in the one-off dimension of the establishment of a static tourist attraction, but in the potential for the project to act as a catalyst to generate Noongar business opportunities and a community culture of creativity in all artistic forms that will lead Moora to becoming a link in the Wheatbelt's art and culture trails. This view is supported by the level of community engagement and commitment that has carried the project to the funding application stage.

The project aligns with the Australian Governments regional development focus areas of investing in people, places and local economies, and also aligns with RDA Wheatbelt's tourism strategy of activating a series of arts and culture trails throughout the Wheatbelt.

Yours sincerely

Mandy Walker
Director Regional Development
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An Australian Government Initiative

Helping to stimulate WA Midlands tourism

The Midlands Way weekend experience

Open all year round ! (not just wildflower season)

Make the Midlands a MUST SEE all year round

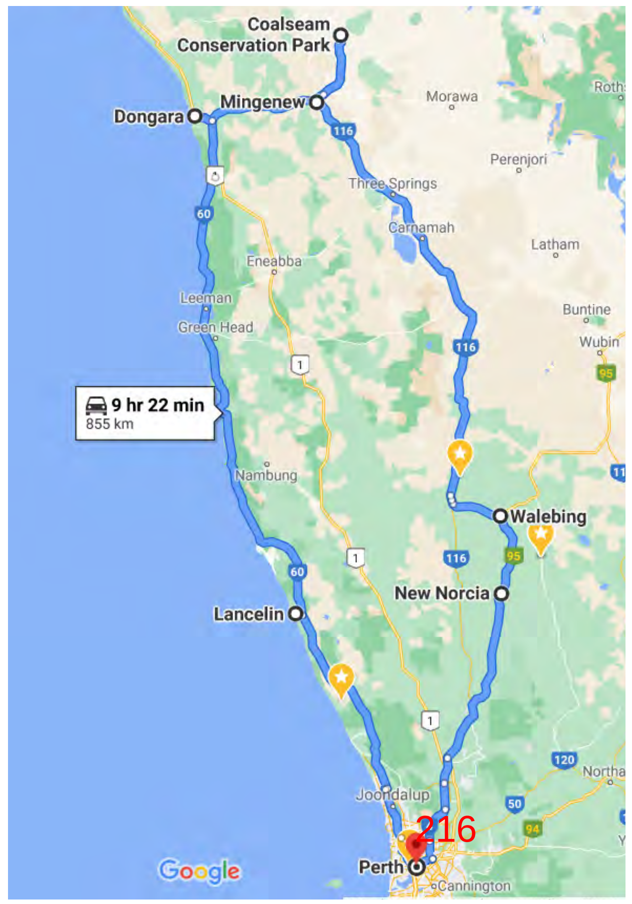
Encourage visitors from Perth to enjoy the coast before returning via the Midlands way

The new BIG Carnabys Sculpture will be one of the major drawcards

Additional new Midlands attractions include

- **Coorow: Koobabbie Precinct (opening 2021)**
- **Carnamah: Big Tractor sculpture (planned)**
- **Midlands railway explorer trail (planned)**

Total trip distance approx. 855km



Big Carnaby sculpture Moora bus tour research

From: Tim Casey <tcasey@caseytours.com.au>
Sent: Wednesday, May 31, 2023 3:23 PM
To: mcc.nrmo@bigpond.com
Subject: FW: Big Carnabys Sculpture for Moora WA

Hi Rachel,

- Do you have tours coming through Moora?
  - We bring through about 15 groups per year averaging about 30 passengers
- If you do, do you stop or just drive through?
  - Many of these groups pass through Moora, the PR around a Big Cocky would force us to stop in town.
- If not, would you considering adding Moora to the itinerary to see the Big Carnaby Sculpture?
  - I would add it in my programs and possibly divert other tours from GNH or Brand through Moora

Regards,

Tim Casey
General Manager

Email: tcasey@caseytours.com.au
Web: www.caseytours.com.au **Address:** 16 Murphy Street | O'Connor WA 6163
Contact Number: 1800 999 677 | 08 9339 4291 | 0416 070 003

Moora tourism now and estimated after BIG Carnaby sculpture is built

Moora tourist numbers from visitor centre

	2017	2018	2019	2020	2021	2022	Av 2017-22	Potential
Overseas	202	269	170	51	76	75	**141**	
Interstate	734	943	848	70	547	980	**687**	
Intrastate	639	1292	961	2135	2362	1828	**1536**	
Total	**1575**	**2504**	**1979**	**2256**	**2985**	**2883**	**2364**	
av per month	131	209	165	188	249	240	**197**	
Total x 4 increase	**6300**	**10016**	**7916**	**9024**	**11940**	**11532**	**9455**	
Tourist traffic **x2 immediate increase** with built sculpture	**12600**	**20032**	**15832**	**18048**	**23880**	**23064**	**18909**	

**Note Visitor Centre figures quadrupled to predict actual tourist traffic through Moora (advice from visitors centre)

Note Figures **doubled to predict immediate Tourist numbers post sculpture

prediction for annual tourists to Moora immediately after building sculpture 18909 people per year

Tourist daily spend	2017	2018	2019	2020	2017-20 av	Future estimate with sculpture
All average	$ 101	$ 101	$ 101	$ 178		$ 178
Total Moora tourist spend 1 day	$ 636,300	$ 1,011,616	$ 799,516	$ 1,606,272	**$ 1,013,426**	**$ 3,365,861**
Total Moora tourist spend 2 days	$ 1,272,600	$ 2,023,232	$ 1,599,032	$ 3,212,544	**$ 2,026,852**	**$ 6,731,723**

**Note $178 NEW Average Daily Spend INTRASTATE | MARKET PROFILE 2020-21 Tourism WA. Prepared by Tourism WA Strategy and Research July 2020

Prior to this was $101 per day per person

	2017-20 av	Future estimate with sculpture	increase	
Total Moora tourist spend 1 day	**$ 1,013,426**	**$ 3,365,861**	$ 2,352,435	232%
Total Moora tourist spend 2 days	**$ 2,026,852**	**$ 6,731,723**	$ 4,704,871	232%

Future predictions of economic gains from increased visitor numbers to Moora (1 day spend)

** Note assuming a daily spend @ $178 per day/per person

	10% increase each year		25% increase each year	
	Total annual visitors	Total 1 day spend	Total annual visitors	Total 1 day spend
2017-20 av	9,455	$1,013,426	9,455	$1,013,426
2023 immediately after sculpture built	18,909	$ 3,365,802	18,909	$ 3,365,802
2024 (1 yr after building)	20,800	$ 3,702,382	23,636	$ 4,207,253
2025 (2 yr after building)	22,880	$ 4,072,620	29,545	$ 5,259,066
2026 (3 yr after building)	25,168	$ 4,479,882	36,931	$ 6,573,833
2027 (4 yr after building)	27,685	$ 4,927,870	46,164	$ 8,217,291
2028 (5 yr after building)	30,453	$ 5,420,657	57,705	$ 10,271,614

Potential 435% increase spending in 5 years

Potential 914% increase spending in 5 years

Coral Coast untapped potential economic gain

Australia's Coral Coast 2021 visitors totalled 1,065,000.

36% (383,400) of these people visited Gingin & Dandaragan Shires

What if 50% (191,700) of these people visited Moora as well ?

1 day spend potential economic income would be **$34,122,600**

Just imagine that !!

Cost benefit analysis

	Expenditure	Income for Moora	1FTE positions	
Sculpture	$ 390,000			
Signage	$ 50,000			
Marketing	$ 25,000			
Maintenance	$ 5,000			
Insurance				unknown
5 yrs tourist 1 day spend		$ 5,420,657		
Jobs created			15	
Aboriginal jobs created			6	
	$ 470,000	**$ 5,420,657**	**21**	

Return on Investment (ROI) over 5 years 1,053%

Investment Gain: $4,950,657