

# Annual Progress Report 2023-2024 Australia's South West Sustainable Tourism Observatory

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Perth, May 2025*

## Acknowledgement

We acknowledge that in the Australia's South West Region, we are respectfully on the land (Boodja) of the Pinjarup, Wiilman, Wadandi, Pibelman, Kaneang, Menang and Koreng Noongar people. When in Perth, we meet, work, and live on the land of the Whadjuk Noongar people.

We pay respect to Elders, past and present, and acknowledge the important role Aboriginal and Torres Strait Islanders continue to play in caring for country across Western Australia. We acknowledge the Traditional Owners of this country and their continuing connection to land, waters and community.



Image courtesy of Tourism Western Australia

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Curtin University

Tourism  
Research Cluster



INSTO

International Network  
of Sustainable Tourism  
Observatories

# 1. EXECUTIVE SUMMARY



## Executive summary



### Tourism governance

- The ASW Tourism Destination Management Plan was launched in 2024 and is a 10-year strategic document with sustainability as a guiding principle.



### Tourism seasonality

- The ASW received 3.3 million overnight visitors and 3.7 million day-trip visitors in YE June 2024, with domestic visitation dominating.
- Leeuwin-Naturaliste recorded the highest visitation among National Parks in the ASW during 2023-2024, almost reaching 5 million visitors.
- Occupancy rates of commercial accommodation in the ASW have remained relatively stable from 2017 to Jun 2024.



### Tourism employment

- In YE June 2024, there were almost 3,000 tourism enterprises in the ASW, more than half of which are classified as employing businesses.
- Tourism in the region generated approximately 8,700 jobs, representing 8.1% of the region's total employment and accounting for 4.5% of its wages.



### Destination economic benefits

- In 2022-23, tourism generated 8.3% of the ASW's Gross Value added and 8.8% of its Gross Regional Product.
- IN YE June 2024, visitors to the region spent \$200 daily, on average.
- The Average Daily Rate and Revenue Per Available Room of commercial accommodation in the region continued with an upward trend from 2017 to 2023.



### Resident satisfaction

- Residents continue to be relatively satisfied with tourists' behaviours and the impact of tourism in the ASW.
- An area of concern is the concentration of tourists in a few hotspots.
- Residents strongly support initiatives to monitor tourism impacts and to strengthen local benefits of tourism.

## Executive summary



### Sustainability and climate action

- >300 businesses in the ASW have a Sustainable Tourism Accreditation by Tourism Council Western Australia.
- 24 businesses in the ASW have an Ecotourism Australia Certification.
- The Shire of Augusta-Margaret River is the only ECO Certified destination by Ecotourism Australia in WA.



### Energy management

- The WA Energy Transformation Strategy is the leading document in the sustainable energy path for the state and the ASW.
- Energy targets have been set at the local level by cities and shires in the ASW, particularly by Margaret River and Busselton.



### Water management

- Water consumption throughout the year follows tourism seasonality trends in the region and is generally higher for caravan parks compared to other tourism land uses.
- Initiatives like the Waterwise Business Program are important to work on water efficiencies in the region.



### Waste management

- Sustainable waste management in the region follows the guidelines of the WA Waste Avoidance and Resource Recovery Strategy 2030.
- Waste collected and recovered in the region decreased from 2021-22 to 2022-23.



### Inclusion and accessibility

- About 64% of people with disabilities are somewhat satisfied with their travels to the ASW. The accessibility of public spaces and museums in the region triggers a significant level of satisfaction.
- Accessible attractions in the region are found especially around Margaret River, Busselton, Bunbury, Albany and Walpole.

## 2. THE AUSTRALIA'S SOUTH WEST SUSTAINABLE TOURISM OBSERVATORY



## The Australia's South West Sustainable Tourism Observatory

**The Australia's South West Sustainable Tourism Observatory (ASWTO) is the only UN Tourism INSTO Observatory in Australia.**



Source: UN Tourism (2025).

## Governance of the Australia's South West Sustainable Tourism Observatory

### Research team

Tourism Research Cluster  
at Curtin University

Implementation



### Working group

Tourism Western Australia  
Australia's South West  
Margaret River Busselton Tourism Association  
Department of Biodiversity, Conservation and Attractions  
Royal Automobile Club WA

Participatory decision making  
Data collection/analysis support  
Advice and control

### Partner organisations

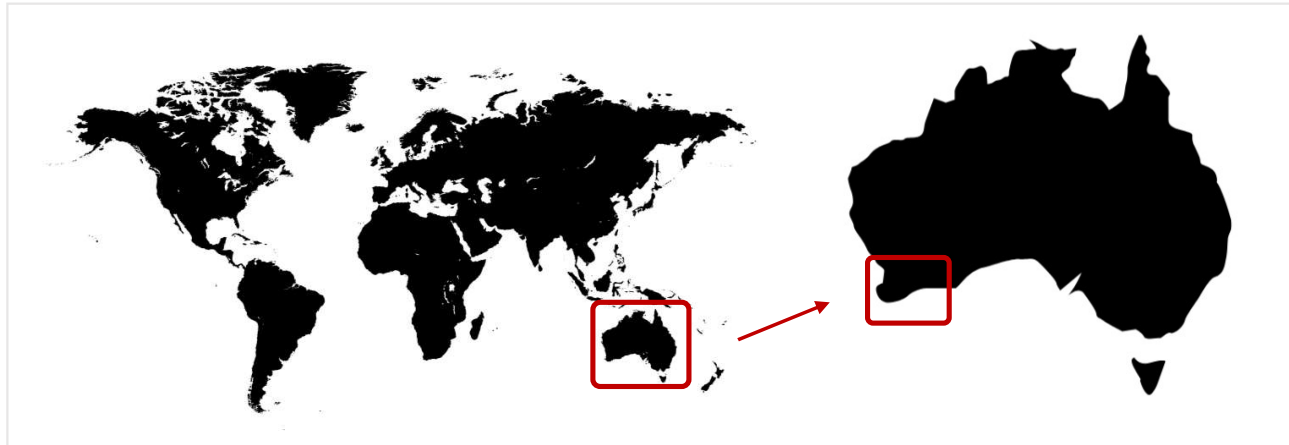
Cities and Shires in the ASW - Department of Water and Environmental Regulation - Ecotourism Australia  
STR - Tourism Council Western Australia - Tourism Research Australia - Water Corporation

### 3. AUSTRALIA'S SOUTH WEST DESTINATION PROFILE



## Destination overview

The Australia's South West (ASW) Tourism Region covers the Southwest corner of Australia and stretches from south of Mandurah to Albany and from the Indian Ocean east to Bremer Bay.



**63,000**  
km<sup>2</sup>



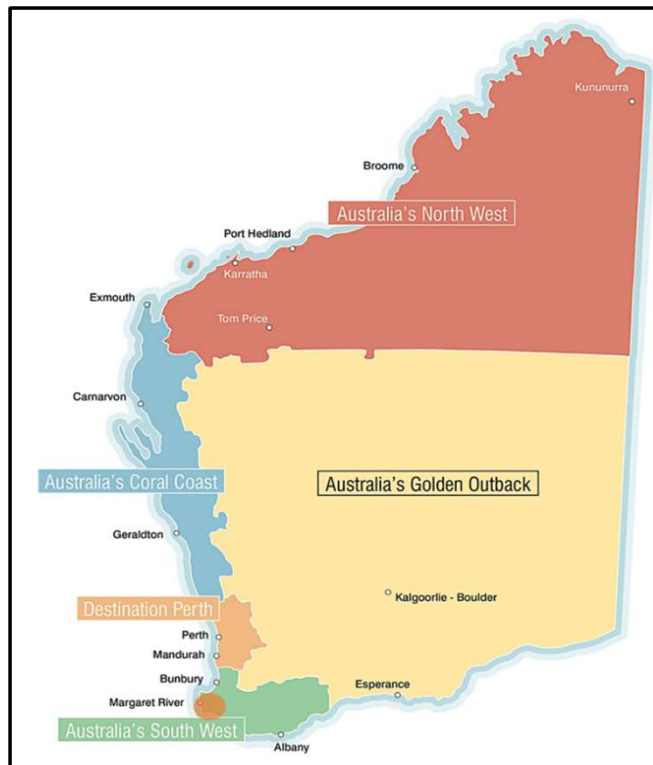
**260,000**  
inhabitants



**Manufacturing**  
**Construction**  
**Mining**  
**Tourism**

## Destination regional profile

ASW is one of five geographically demarcated tourism regions within Western Australia



Source: Tourism WA (2019).

ASW is divided into the Bunbury Geographe, Great Southern, Margaret River Region and Southern Forests and Valleys



Source: Australia's South West (2022).

## Destination tourism offering

The ASW has a diverse tourism offering and regional identity centred around nature-based attractions and agricultural produce.

Key attractions include:

- Beach and aquatic recreation (e.g., surfing, fishing, diving)
- Wine and food (e.g., wineries, breweries, dining, local produce)
- Natural attractions (e.g., >20 national parks, caves, forest, coastline, mountains and rocks)
- Adventure activities (e.g., Cape to Cape hiking track, 4x4 driving, diving, whale watching, cycling and mountain biking)
- Heritage sites (e.g., Busselton Jetty, lighthouses, Albany's Historic Whaling Station, National ANZAC Centre)
- Events (e.g., Pair'd Margaret River, Truffle Kerfuffle, sporting events)
- Wellness

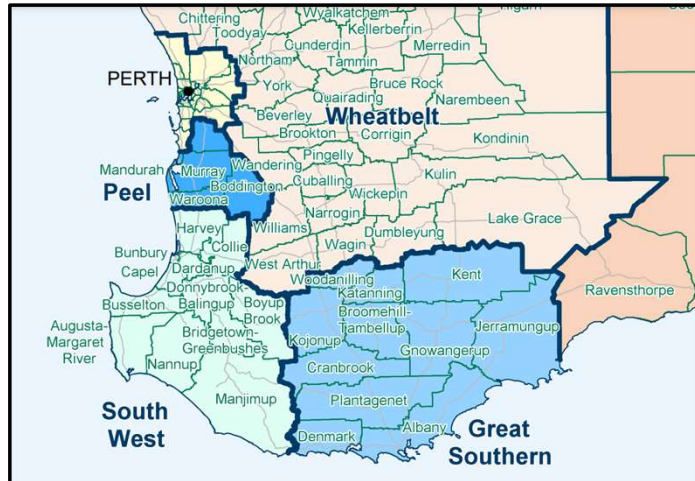


Image courtesy of Tourism Western Australia



## Destination population profile

- The Australia's South West Tourism Region covers two Western Australian development regions: the South West and the Great Southern.
- The ASW has a population of approximately 267,600 inhabitants (201,600 in the South West and 66,000 in the Great Southern). It is the most populated region in Western Australia after the state capital Perth.



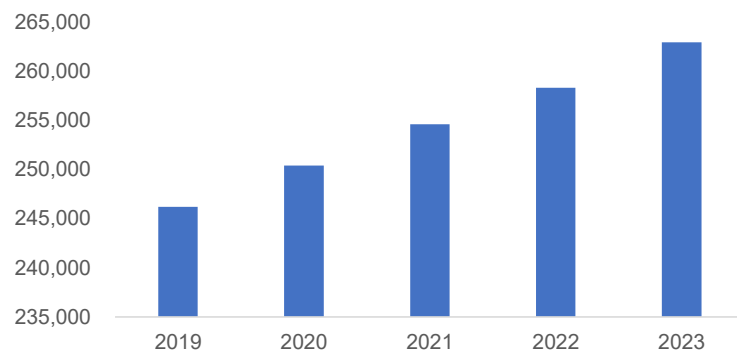
Source: Adapted from Tourism WA (2020).

- The local government areas in the region are:
  - Shire of Donnybrook-Balingup
  - Shire of Harvey
  - Shire of Capel
  - Shire of Collie
  - Shire of Dardanup
  - City of Bunbury
  - City of Busselton
  - Shire of Augusta-Margaret River
  - City of Albany
  - Shire of Denmark
  - Shire of Bridgetown-Greenbushes
  - Shire of Manjimup
  - Shire of Nannup
  - Shire of Boyup Brook
  - Shire of Woodanilling
  - Shire of Kojonup
  - Shire of Kent
  - Shire of Katanning
  - Shire of Broomehill-Tambelup
  - Shire of Plantagenet
  - Shire of Cranbrook
  - Shire of Gnowangerup
  - Shire of Jerramungup

## Destination population profile

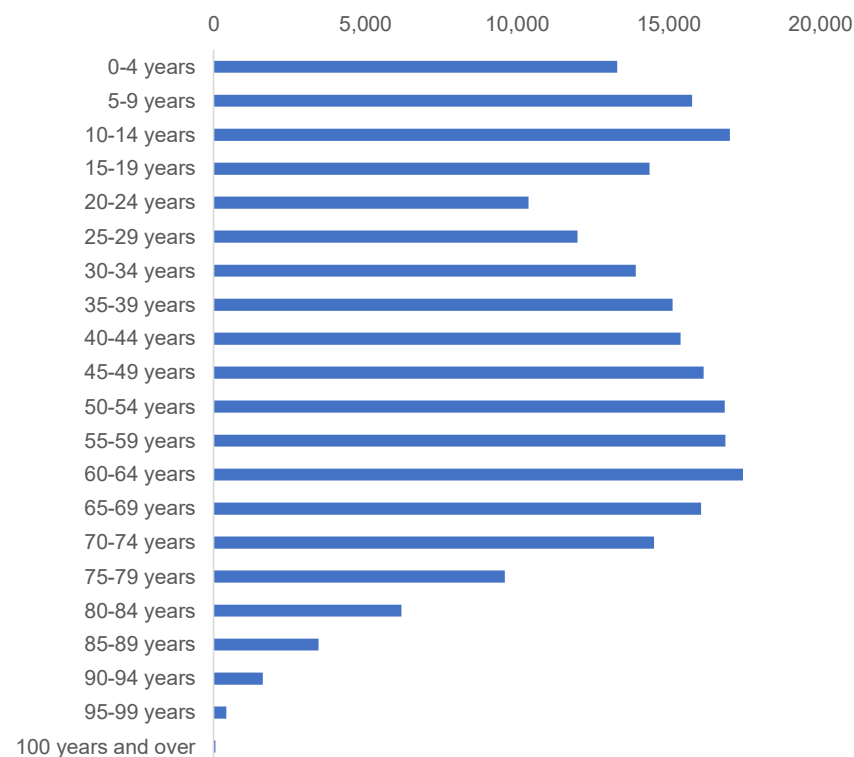
- The population in the ASW has been growing steadily from about 246,200 residents in 2019 to 262,912 residents in 2023.
- The median age in the South West is 43 years, and 45 years in the Great Southern.

### Evolution of total population in the ASW, 2019-2023



Source: REMPLAM (2025).

### Age cohorts in the ASW, 2021

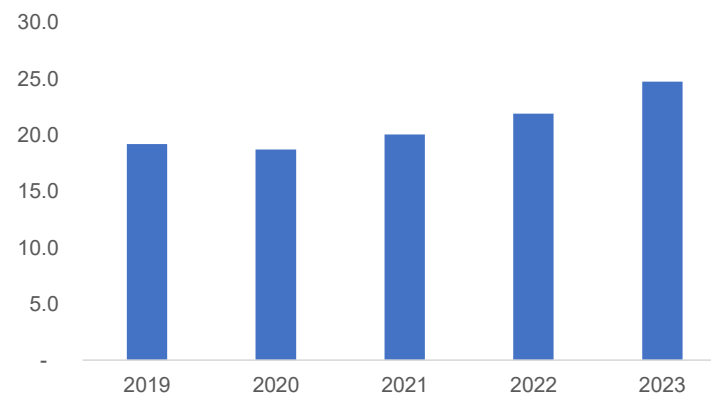


Source: REMPLAM (2025).

## Destination economic profile

- The Australia's South West has an approximate Gross Regional Product (GRP) of \$24.7 billion with the South West contributing \$19 billion and the Great Southern \$5.7 billion in 2024.
- Considering the population figures, the GRP per capita is approximately \$94,000 in the region. Meanwhile, according to data for year ending June 2023, the State's per capita Gross State Product is around \$157,000 (ABS, 2025).
- The ASW generates an estimated \$54.7 billion in economic output (total sales of goods and services). This number represents 6.5% of the output generated in Western Australia.

**Evolution of Gross Regional Product in the ASW, 2019-2023**



Source: REMPLAM (2025).

## Destination economic profile



- **Spatial perspective:** The largest contributors to the ASW economy are Bunbury (\$11.969 billion), Collie (\$8.013 billion), Albany (\$6.900 billion) and Busselton (\$6.738 billion).
- **Industry perspective:** The activities that contribute the most to the regional output are manufacturing (21% of regional output), construction (13%) and mining (12%).
- **Jobs:** There are an estimated 107,000 jobs in the ASW which account for 8.2% of total jobs in Western Australia. Around 75% of these jobs are in the South West development region and 25% in the Great Southern region.

## 4. KEY SUSTAINABILITY MONITORING AREAS



## Key sustainability monitoring areas



**Tourism governance**



**Tourism seasonality**



**Tourism employment**



**Destination economic benefits**



**Resident satisfaction**



**Sustainability and climate action**



**Inclusion and accessibility**



**Water management**



**Energy management**



**Waste management**

## Data sources

No.	Key sustainability monitoring area	Indicator	Type of data source	Nature of data	Data source
1	Tourism governance	Governance structure	Secondary	Qualitative	TWA, DBCA, ASW, Development Commissions, MRBTA. Local Shires
		Tourism plans	Secondary	Qualitative	ASW
		Tourism marketing campaign	Secondary	Quantitative	ASW
2	Tourism seasonality	Tourist visitation	Secondary	Quantitative	NVS-IVS TRA, TWA
		Accommodation occupancy rate	Secondary	Quantitative	STR
		National park visitation	Secondary	Quantitative	DBCA
3	Tourism employment	Tourism businesses	Secondary	Quantitative	TRA
		Tourism employment	Secondary	Quantitative	ABS, REMPLAN
4	Destination economic benefits	Tourism economic contribution	Secondary	Quantitative	TSA, ABS, REMPLAN
		Tourist spending	Secondary	Quantitative	NVS-IVS, TWA
		Accommodation daily rates and revenue per available room	Secondary	Quantitative	STR
5	Resident satisfaction	Resident satisfaction	Primary	Quantitative and qualitative	Resident survey

## Data sources

No.	Key sustainability monitoring area	Indicator	Type of data source	Nature of data	Data source
6	Sustainability and climate action	Climate trends	Secondary	Quantitative	Department of Water and Environmental Regulation, Zurich & Mandala
		Programs for tourism operators	Secondary	Quantitative and qualitative	Tourism Council WA, Ecotourism Australia
		Programs for tourism destinations	Secondary	Quantitative and qualitative	Ecotourism Australia
7	Inclusion and accessibility	Visitor experience	Primary	Quantitative and qualitative	Visitor survey
		Accessible facilities	Secondary	Quantitative	TWA
		Programs for tourism operators	Secondary	Qualitative	Tourism Council WA
8	Water management	Regulations and actions	Secondary	Qualitative	Water Corporation
		Water consumption	Secondary	Quantitative	Water Corporation
9	Energy management	Regulations and actions	Secondary	Qualitative	Energy Policy WA, Local Shires
10	Solid waste management	Regulations and actions	Secondary	Qualitative	Waste Authority
		Solid waste production	Secondary	Quantitative	Department of Water and Environmental Regulation

## 4.1 TOURISM GOVERNANCE

## Governance structure of tourism management within the destination





## ASW Tourism Destination Management Plan

- The **ASW Tourism Destination Management Plan** was launched in 2024 and outlines the tourism strategy for the next 10 years.
- Its vision centres around the idea that *the ASW region is globally renowned for ancient culture, natural beauty, exceptional produce, creative communities and iconic adventures.*
- The plan has four guiding principles: sustainable, accessible, exceptional and connected.



Source: Australia's South West (2025).

## ASW Tourism Destination Management Plan



Image courtesy of Tourism Western Australia

- The ASW Tourism Destination Management Plan features the goal to *strengthen capacity and capability to support sustainability*.
- Initiatives to achieve such goal are:
  - Increasing the pool of tourism workers through training and development.
  - Improving industry capacity and growing the sustainability (environmental, social and economic) and accessibility credentials of the region.
- The plan also has initiatives linked to:
  - Promoting visitor dispersal.
  - Facilitating the development of tourism worker accommodation.
  - Integrating Aboriginal culture.



## ASW Winter campaign



- The ASW winter campaign 2024 ran between May and August with the aim of stimulating intrastate visitation through tourism promotion.
- The campaign featured digital and physical promotion, media partnerships, buy-in opportunities, and social media advertising.

**13,923**  
visitors to  
winterdownsouth.com

**778**  
outbound link clicks to  
member booking URL's

**25,771**  
subscribers emailed

**624,148**  
Meta reach on ASW's  
Facebook and Instagram

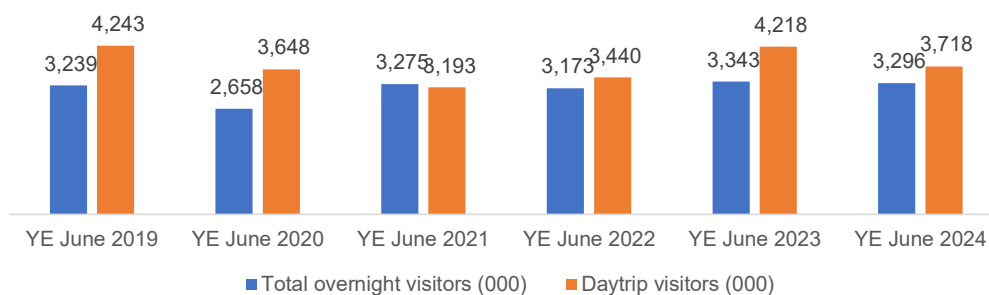
**>673,000**  
Perth is OK reach

Source: Australia's South West (2025).

## 4.2 TOURISM SEASONALITY

## Visitation overview

Visitation to the ASW, YE Jun 2019 – YE Jun 2024

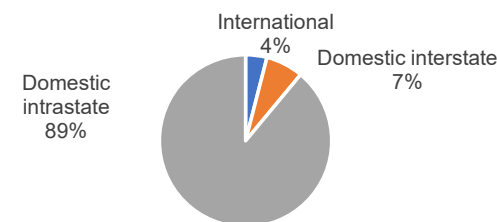


	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023	YE June 2024
International overnight visitors (000)	193	147	np	15	134	128
Domestic interstate overnight visitors (000)	236	201	82	np	234	np
Domestic intrastate overnight visitors (000)	2,811	2,310	3,193	3,052	2,975	3,023
<b>Total overnight visitors (000)</b>	<b>3,239</b>	<b>2,658</b>	<b>3,275</b>	<b>3,173</b>	<b>3,343</b>	<b>3,296</b>
Daytrip visitors (000)	4,243	3,648	3,193	3,440	4,218	3,718

Source: Tourism WA based on TRA (2025b). Own illustration and table.  
Np data cannot be published due to small sample sizes.

- In YE June 2024, the ASW received 3.3 million overnight visitors (28% of all overnight visitors to Western Australia) and 3.7 million daytrip visitors (20% of all daytrip visitors to WA).
- Most overnight visitors to the ASW are domestic intrastate (around 89% according to data for YE June 2023), followed by domestic interstate (around 7% in YE June 2023).
- International visitation has not yet returned to pre COVID-19 levels, while domestic visitation, particularly intrastate, experienced a big jump with the pandemic and has remained around the 3 million visitors since. Daytrip visitation decreased after peaking in YE June 2023 (after the former peak in 2019).

Contribution to total overnight visitation in the ASW per market, YE June 2023



Source: Tourism WA based on TRA (2025b). Own illustration.



## Visitation overview

### Total nights in the ASW, YE Jun 2019 – YE Jun 2024

	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023	YE June 2024
International nights (000)	1,943	1,643	np	156	1,505	2,700
Domestic interstate nights (000)	1,093	1,116	669	np	1,254	np
Domestic intrastate nights (000)	8,717	7,576	10,846	10,650	9,219	9,666
<b>Total nights (000)</b>	<b>11,753</b>	<b>10,335</b>	<b>11,515</b>	<b>11,501</b>	<b>11,978</b>	<b>12,933</b>

### Average length of stay in the ASW, YE Jun 2019 – YE Jun 2024

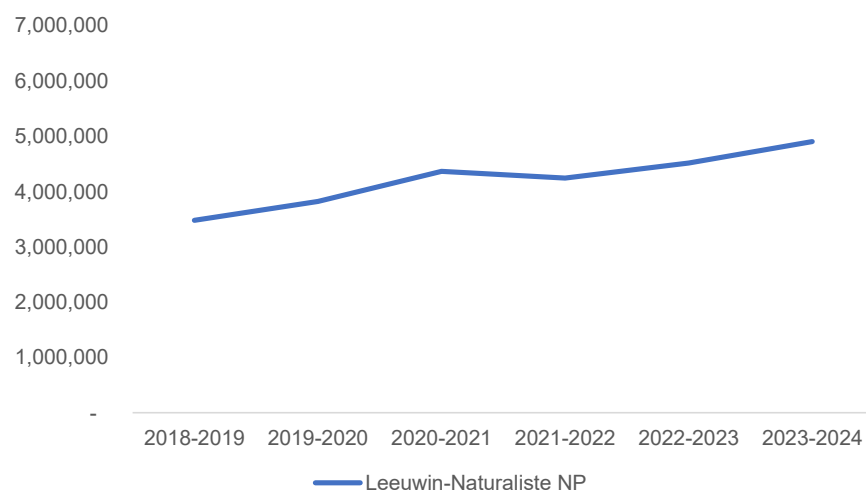
	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023	YE June 2024
International average length of stay (nights)	10.1	11.2	np	10.1	11.2	21.1
Domestic interstate average length of stay (nights)	4.6	5.6	8.2	np	5.3	np
Domestic intrastate average length of stay (nights)	3.1	3.3	3.4	3.5	3.1	3.2
<b>Total average length of stay (nights)</b>	<b>3.6</b>	<b>3.9</b>	<b>3.5</b>	<b>3.6</b>	<b>3.6</b>	<b>3.9</b>

- Despite the number of international visitors decreased from YE June 2023 to YE June 2024, the number of nights that this market spent in the ASW almost doubled in that period.
- Compared to domestic tourists, with an average length of stay of 3 to 5 nights in YE June 2023 and YE June 2024, international tourists stayed for an average of 11 nights in YE June 2023 and 21 nights in YE June 2024.

Source: Tourism WA based on TRA (2025b). Own table.  
Np data cannot be published due to small sample sizes.

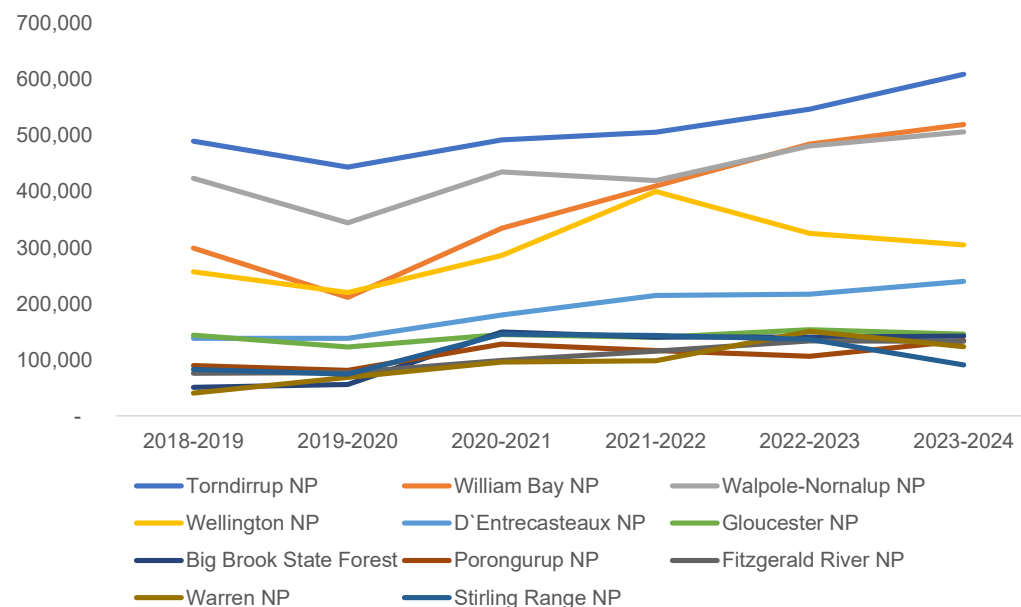
## Visitation at parks

**Visitation at parks in the ASW, 2018-2024 (a)**



Note: Figures supplied are 'visits' and not visitors, which has no length of stay associated, i.e. if someone leaves and then re-enters again later, a second data unit is recorded. Some of the variations in visitation/activity may be due to temporary closures and deviations due to maintenance and/or fires. Elaborated and reported by DBCA WA (2025). Own illustration.

**Visitation at parks in the ASW, 2018-2024 (b)**



Note: Figures supplied are 'visits' and not visitors, which has no length of stay associated, i.e. if someone leaves and then re-enters again later, a second data unit is recorded. Some of the variations in visitation/activity may be due to temporary closures and deviations due to maintenance and/or fires. Elaborated and reported by DBCA WA (2025). Own illustration.

## Visitation at parks

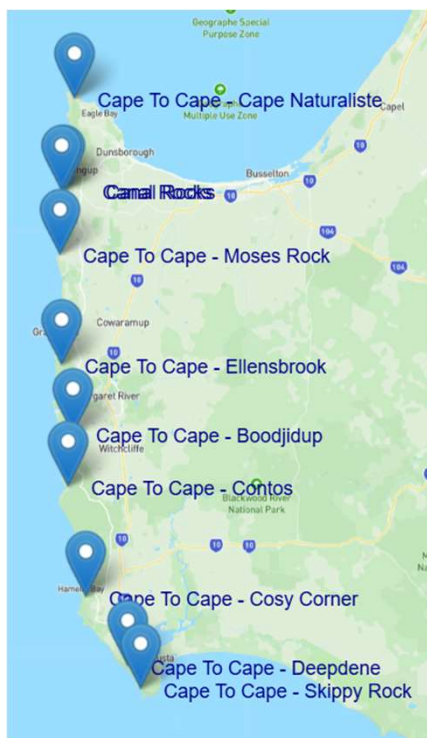


Image courtesy of Tourism Western Australia

- The Australia's South West Tourism Region is home to >40 parks, including national, regional, conservation and marine parks, as well as nature reserves and state forests.
- DBCA visitation statistics to some of these show the prominence of Leeuwin-Naturaliste National Park, home of the Cape Naturaliste and stunning beaches.
- Visitation figures have been growing continuously in this park, growing by 9% from 2022-23 to 2023-24 and almost reaching 5 million visitors in the most recent period.
- Torndirrup National Park, William Bay National Park and Walpole-Nornalup National Park follow in importance with approximately 500-600 thousand visits each in 2023-24.

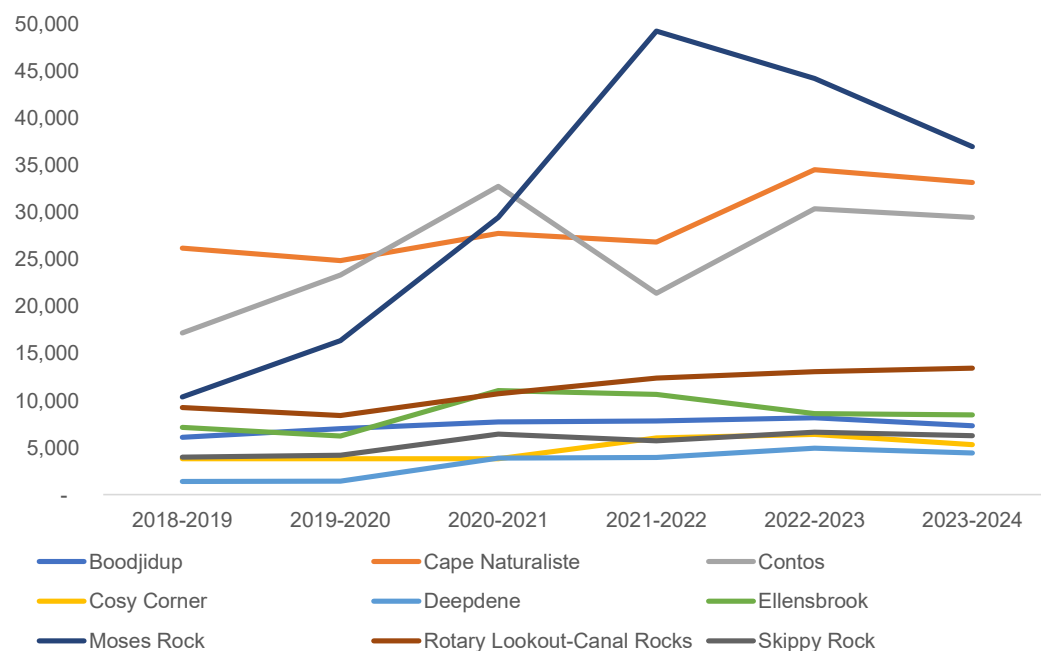
## Visitation at parks

### Cape-to-Cape counter locations



Source: DBCA (2025).

### Cape-to-Cape Track visitation at selected monitoring locations at the Leeuwin-Naturaliste National Park

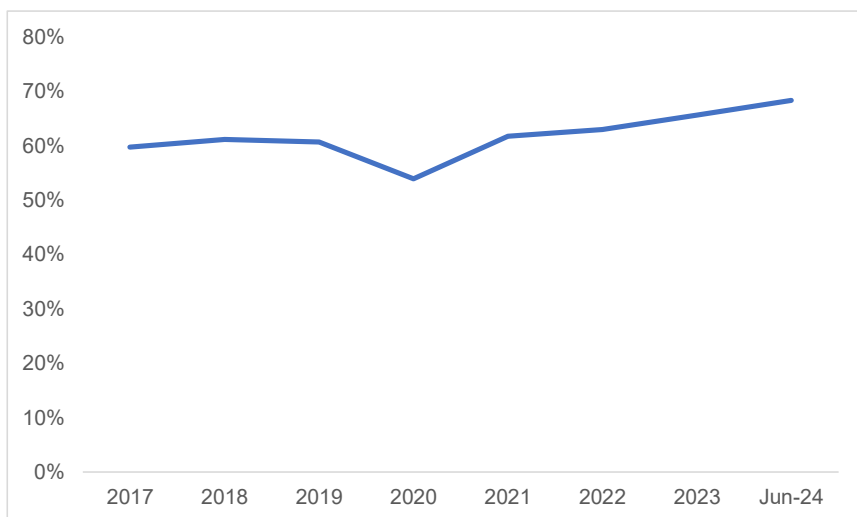


Note: Figures supplied are 'visits' and not visitors, which has no length of stay associated, i.e. if someone leaves and then re-enters again later, a second data unit is recorded. Some of the variations in visitation/activity may be due to temporary closures and deviations due to maintenance and/or fires. Elaborated and reported by DBCA WA (2025). Own illustration.

- The Cape-to-Cape Track represents the most famous walking trail in the region.
- It runs for 135 kilometres along the Leeuwin-Naturaliste National Park.
- Visitation to the track has been relatively stable over the years (except for the strong increase at Moses Rock 2020 to 2022) with Moses Rock, Contos and Cape Naturaliste recording the highest visitation during 2018-2022.

## Occupancy rates in commercial accommodation

**Annual average of occupancy levels among selected commercial accommodation providers in the ASW, 2017 – Jun 2024**  
(n=30 properties with 1,565 rooms)



Note: The figure is based on a sample of commercial accommodation providers in the ASW. Based on the STR (2025) – Trend Report. Own analysis and illustration.

- The visitation rate to the ASW fluctuates based on the seasons, with the peak reached in the summer months, particularly in January.
- The off-peak season is in winter, between June and August. Visitation slightly increases in July during school holidays.
- Occupancy rates of commercial accommodation in the ASW have shown a slight upward trend in the period 2017 - June 2024.
- Annual average occupancy rates oscillated between 60% and 66% during 2017 - 2023, except for 2020 during the initial stages of the COVID-19 pandemic.



## Occupancy rates in commercial accommodation

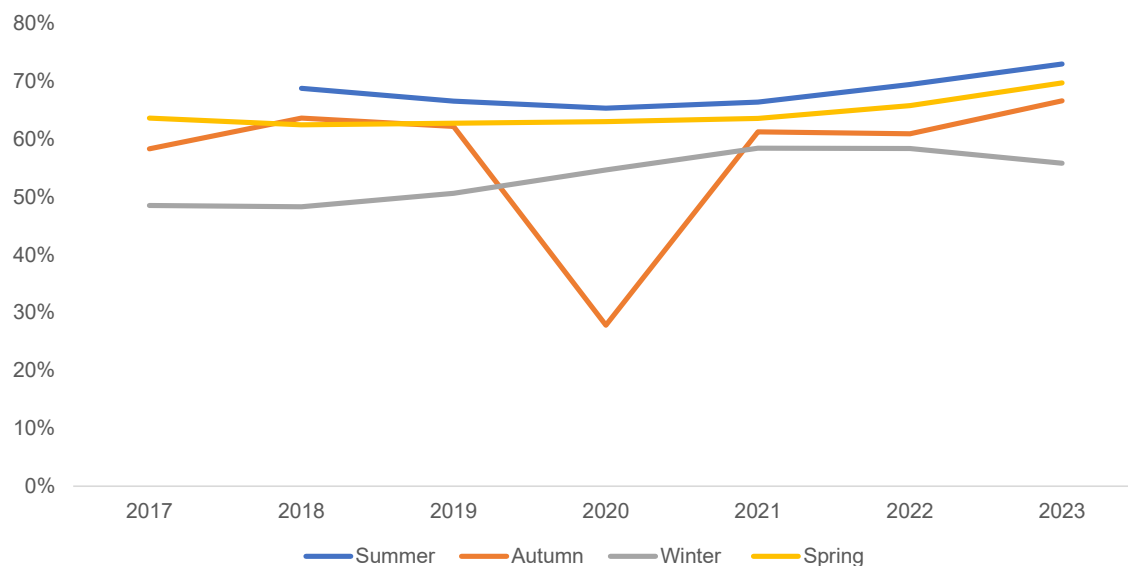
**Monthly averages of occupancy levels among selected commercial accommodation providers in the ASW, Jan 2027- Jun 2024 (n=30 properties with 1,565 rooms)**



Note: The figure is based on a sample of commercial accommodation providers in the ASW. Based on the STR (2025) – Trend Report. Own analysis and illustration.

## Occupancy rates in commercial accommodation

**Seasonal averages of occupancy levels among selected commercial accommodation providers in the ASW, 2017 – 2023**  
(n=30 properties with 1,565 rooms)



- The occupancy rates in accommodation within the region fluctuate between 65%-73% in the peak summer period, and 48-58% in winter (except for the atypical COVID-19 autumn season in 2020).
- Since 2021, the increased occupancy rate in winter has settled at 56-58%.
- The shoulder seasons of spring and autumn have also been strong and around 70% in 2023.

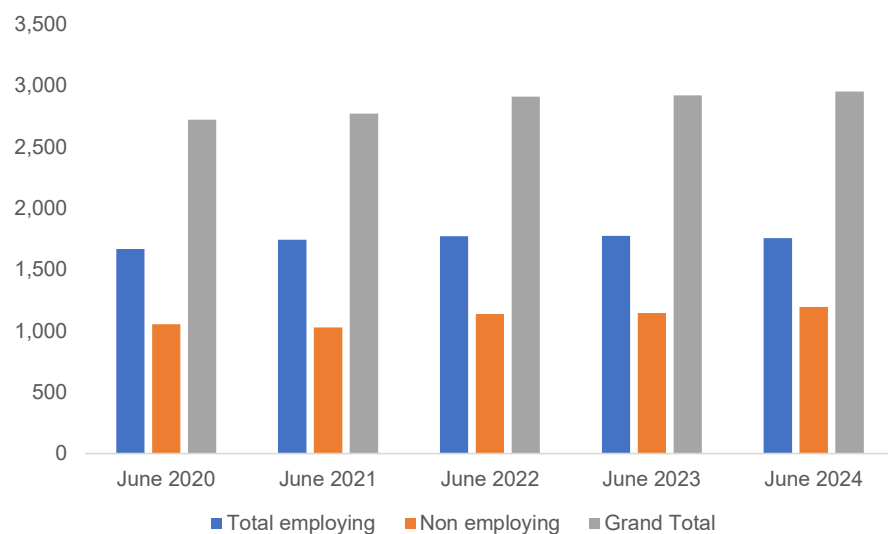
Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August.

Note: The figure is based on a sample of commercial accommodation providers in the ASW. Based on the STR (2025) – Trend Report. Own analysis and illustration.

## 4.3 TOURISM EMPLOYMENT

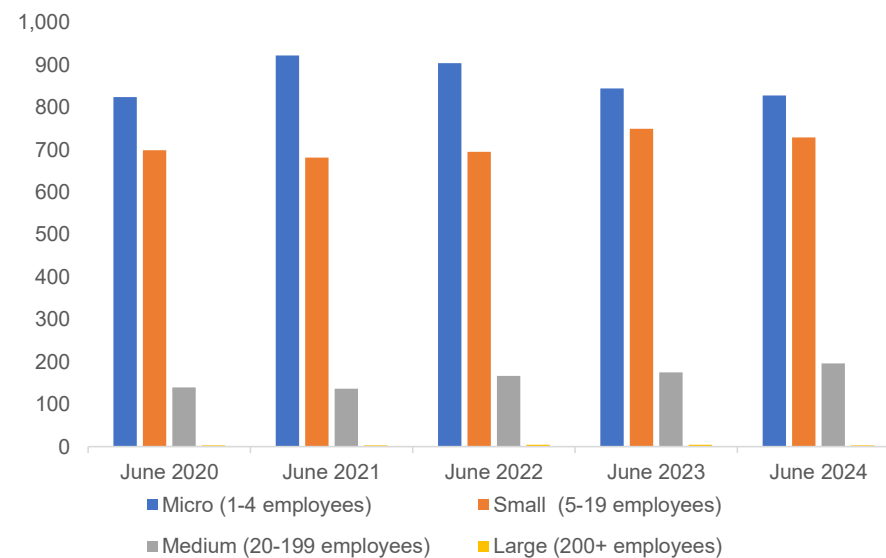
## Tourism employment

### Evolution of employing and non-employing tourism-related businesses in the ASW, Jun 2020 – Jun 2024



Source: TRA (2025) based on Australian Bureau of Statistics, ABS Business Register. Own illustration.

### Evolution of employing tourism-related businesses by size in the ASW, Jun 2020 – Jun 2024



Source: TRA (2025) based on Australian Bureau of Statistics, ABS Business Register. Own illustration.

## Tourism employment



- There were 2,951 tourism-related businesses in the ASW in YE June 2024 (versus 2,919 in YE June 2023). This figure represents 9.4% of all tourism-related businesses in Western Australia.
- Around 60% of tourism-related businesses in the ASW were employing personnel, a proportion that has remained consistent over YE June 2020 – YE June 2024.
- Among ASW tourism-related employing businesses, above 90% were micro or small businesses, a proportion that has remained consistent over the whole period considered.
- In YE June 2024, there were 828 micro companies and 729 small companies, i.e. 93% of all employing companies were micro or small, with less than 20 employees.

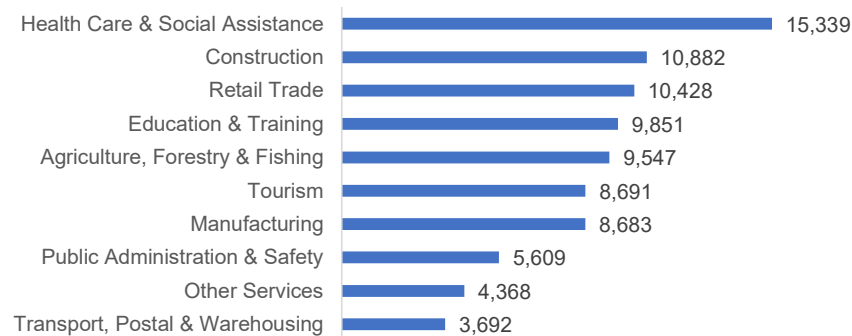


## Tourism employment



Image courtesy of Tourism Western Australia

### Top 10 industries by number of jobs in the ASW



Source: REMPLAM (2025). Own illustration.

- In the ASW, tourism supports around 8,691 jobs (6,746 in the South West and 1,945 in the Great Southern). It ranks 6<sup>th</sup> in the region, contributing to 8.1% of total jobs in the ASW.
- Jobs in this category generate wages equivalent to \$484.7 million, accounting for 4.5% of total wages in the region.
- The cities and shires where most tourism jobs are found are Busselton, Bunbury, Augusta-Margaret River and Albany.

## 4.4 DESTINATION ECONOMIC BENEFITS

## Tourism economic contribution

### Gross Value Added and Gross Regional Product in the ASW, 2019-2020 to 2022-2023

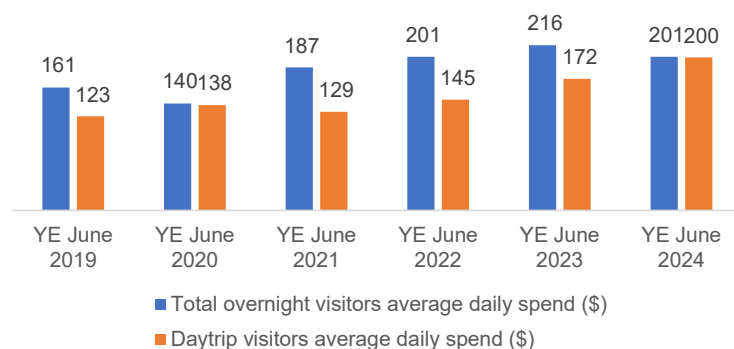


Source: Tourism WA based on TRA (2024). Own illustration.

- In 2022-2023, tourism (direct and indirect) was worth \$2,162 million measured by its Gross Value Added (GVA). This is equivalent to 8.3% of the region's total economy and 18% of Western Australia's total tourism GVA. If we only consider the direct GVA, it reached \$1,051 million, representing 18% of the regional economy.
- In terms of Gross Regional Product (GRP), total tourism was worth \$2,373 million, equivalent to 8.8% of the region's total economy and 18% of Western Australia's total tourism GVA. If we only consider the direct GRP, it reached \$1,135 million, representing 17% of the regional economy.
- Both GVA and GRP have evolved similarly over the last few years, with an overall increasing trend from 2019-20 to 2022-23.

## Tourist spending

**Average daily spend of visitors in the ASW,  
YE Jun 2019 – YE Jun 2024**



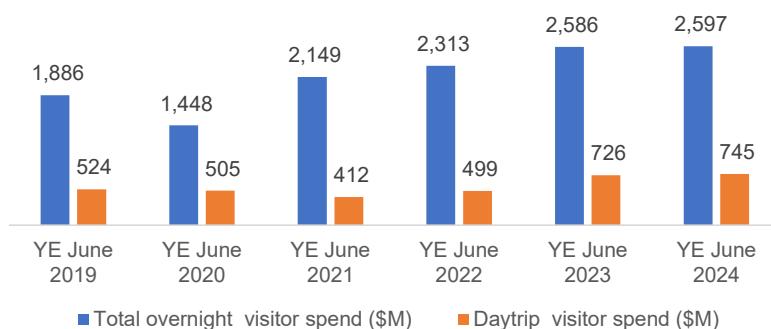
	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023	YE June 2024
International overnight visitors average daily spend (\$)	90	59	np	85	85	70
Domestic interstate overnight visitors average daily spend (\$)	172	194	133	np	273	np
Domestic intrastate overnight visitors average daily spend (\$)	175	150	190	206	229	234
<b>Total overnight visitors average daily spend (\$)</b>	<b>161</b>	<b>140</b>	<b>187</b>	<b>201</b>	<b>216</b>	<b>201</b>
Daytrip visitors average daily spend (\$)	123	138	129	145	172	200

Source: Tourism WA based on TRA (2025b). Own illustration and table.  
Np data cannot be published due to small sample sizes.

- Average daily spend of overnight and daytrip visitors in the ASW in YE June 2024 was very similar, reaching around \$200 in both cases.
- Considering the different markets and their evolution from YE June 2023 to YE June 2024, average daily spend has increased for intrastate overnight visitors and daytrip visitors, and decreased for international overnight visitors (who have seen a strong increase to their length of stay).
- Importantly, while average daily spend is lower for international overnight visitors, their average length of stay in the region is higher leading to a higher overall spending.

## Tourist spending

**Total spend of visitors in the ASW,  
YE Jun 2019 – YE Jun 2024**

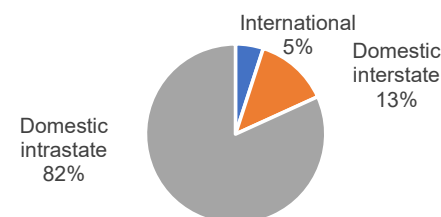


	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023	YE June 2024
International overnight visitor spend (\$M)	176	96	np	13	129	189
Domestic interstate overnight visitor spend (\$M)	189	217	89	np	342	np
Domestic intrastate overnight visitor spend (\$M)	1,522	1,135	2,060	2,198	2,115	2,262
<b>Total overnight visitor spend (\$M)</b>	<b>1,886</b>	<b>1,448</b>	<b>2,149</b>	<b>2,313</b>	<b>2,586</b>	<b>2,597</b>
Daytrip visitor spend (\$M)	524	505	412	499	726	745

Source: Tourism WA based on TRA (2025b). Own illustration and table. Np data cannot be published due to small sample sizes.

- In YE June 2024, the total spend of overnight visitors was \$2,597 million, slightly above that of YE June 2023. Most of this spend comes from domestic intrastate visitors (around 82% in YE June 2023) followed by domestic interstate visitors (13% in YE June 2023).
- Daytrip visitors spent \$745 million in the ASW in YE June 2024, slightly increasing from YE June 2023 after a significant jump from YE June 2022 to YE June 2023.

**Contribution to total overnight visitor spend in the ASW per market, YE June 2023**

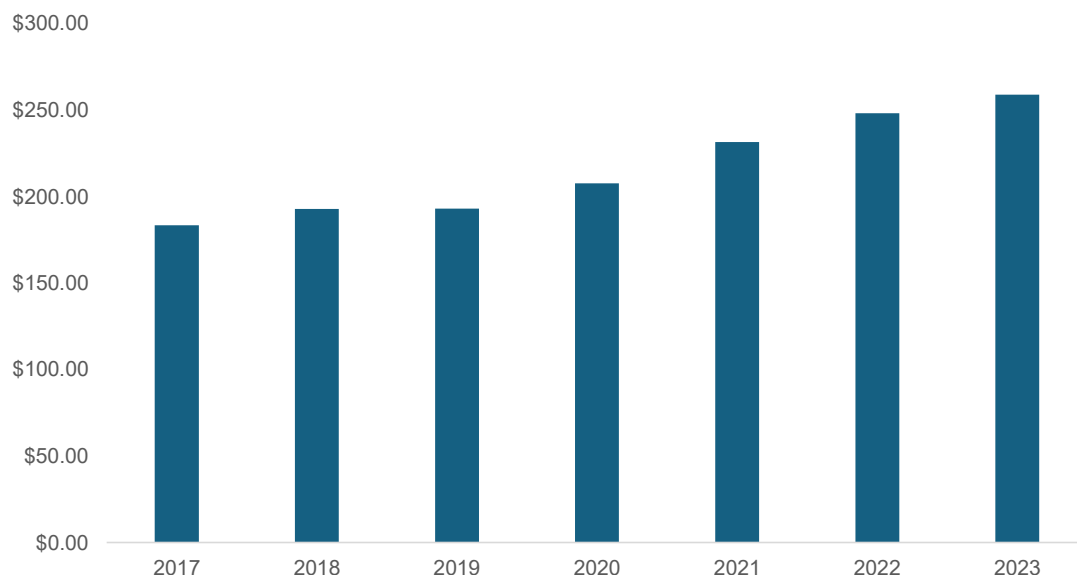


Source: Tourism WA based on TRA (2025). Own illustration.



## Average Daily Rate (ADR)

### Annual ADR among selected commercial accommodation providers in the ASW, 2017 – 2023 (n=30 properties with 1,565 rooms)

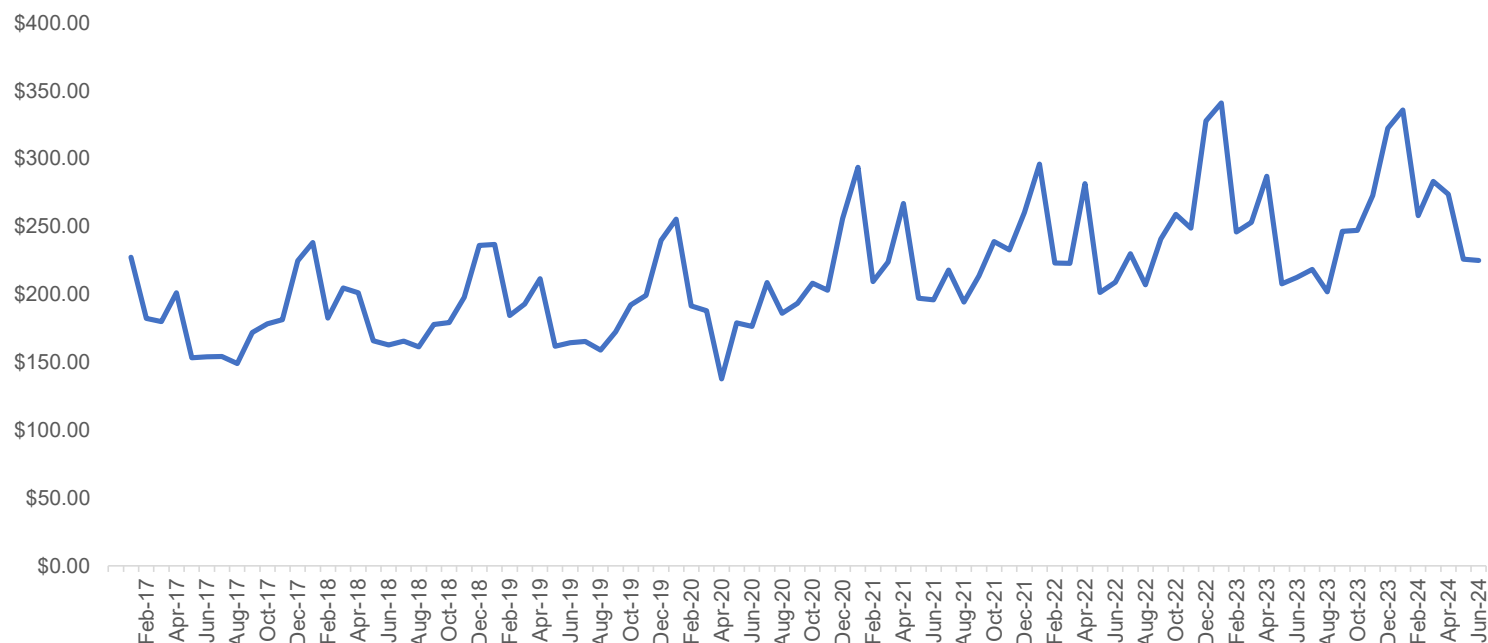


- On average, the daily room rate (ADR) in commercial accommodations in the ASW was \$259 in 2023.
- ADR grew by 2% from 2022 to 2023.
- ADR grew by 5% p.a. on average between 2017 and 2023.

Source: Based on the STR (2025) – Trend Report. Own analysis and illustration. The figure is based on a sample of commercial accommodation providers in the ASW.

## Average Daily Rate (ADR)

**Monthly ADR among selected commercial accommodation providers in the ASW,  
Jan 2017 – Jun 2024 (n=30 properties with 1,565 rooms)**

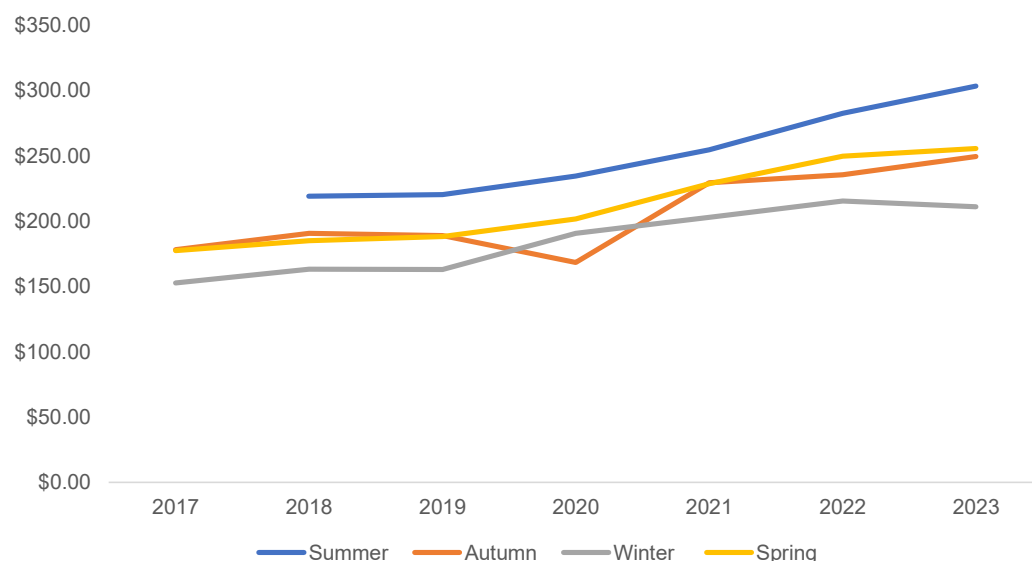


- Monthly average rates mirror the seasonal fluctuations of occupancy rates.

Source: Based on the STR (2025) – Trend Report. Own analysis and illustration. The figure is based on a sample of commercial accommodation providers in the ASW.

## Average Daily Rate (ADR)

**Seasonal ADR among selected commercial accommodation providers in the ASW, 2017-2023**  
(n=30 properties with 1,565 rooms)



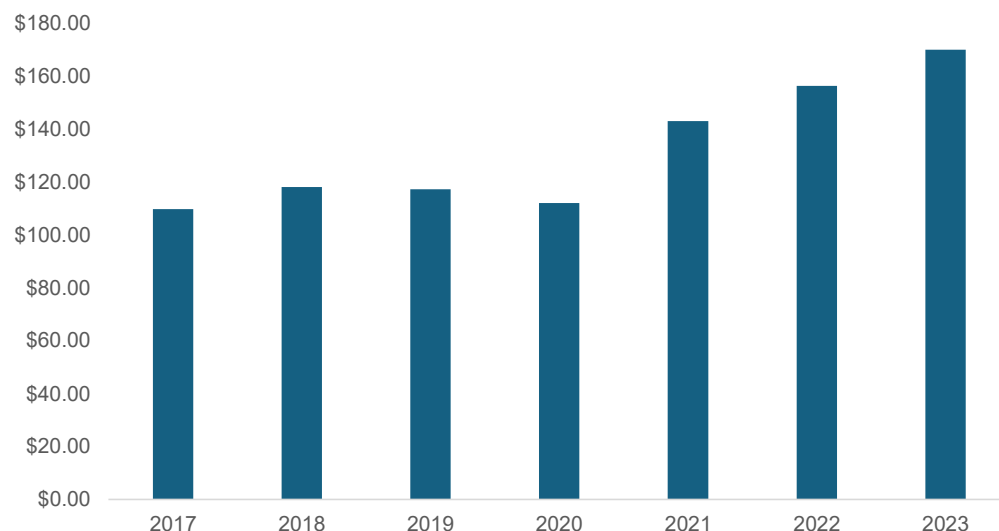
Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August.

Source: Based on the STR (2025) – Trend Report. Own analysis and illustration. The figure is based on a sample of commercial accommodation providers in the ASW.

- The period 2017-2023 was characterised by an overall increase of rates across all seasons.
- Most commercial accommodation providers in the region adapt their rates to demand, with higher rates during the peak summer season and lower rates in the winter season.
- The summer ADR has been 23% to 44% above the winter ADR, with the highest difference in 2023.
- In 2023, the summer ADR was \$303 (versus \$282 in 2022) while the winter ADR was \$211 (versus \$215 in 2022).

## Revenue Per Available Room (RevPAR)

### Average RevPAR among selected commercial accommodation providers in the ASW, 2017 – 2023 (n=30 properties with 1,565 rooms)



- On average, Revenue Per Available Room (RevPAR) in commercial accommodations in the ASW was \$170 in 2023.
- RevPAR grew by 4% from 2022 to 2023.
- RevPAR grew by 6% p.a. on average between 2017 and 2023.

Source: Based on the STR (2025) – Trend Report. Own analysis and illustration. The figure is based on a sample of commercial accommodation providers in the ASW.

## Revenue Per Available Room (RevPAR)

**Monthly average RevPAR among selected commercial accommodation providers in the ASW,  
Jan 2017 – Jun 2024 (n=30 properties with 1,565 rooms)**



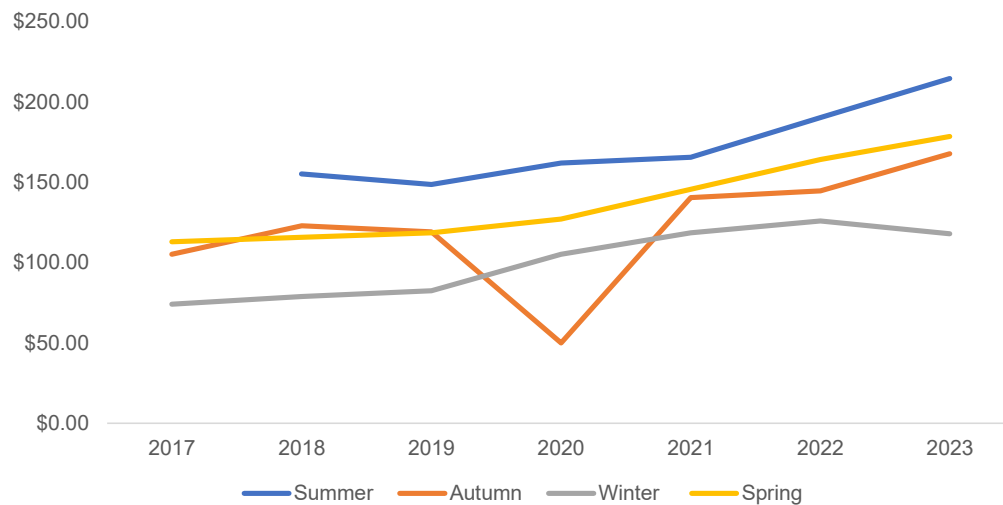
- Monthly RevPAR mirror the seasonal fluctuations of occupancy and average daily room rates.

Source: Based on the STR (2025) – Trend Report. Own analysis and illustration. The figure is based on a sample of commercial accommodation providers in the ASW.



## Revenue Per Available Room (RevPAR)

**Seasonal average RevPAR among selected commercial accommodation providers in the ASW, 2017-2023**  
(n=30 properties with 1,565 rooms)



- The seasonal pattern of RevPAR shows similar trajectories as occupancy rates and daily room rates.
- The summer RevPAR has been 40% to 97% above the winter RevPAR, with the highest difference in 2018.
- In 2023, the summer RevPAR was \$ 214 (versus \$190 in 2022) while the winter RevPAR was \$118 (versus \$126 in 2022).

Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August.

Source: Based on the STR (2025) – Trend Report. Own analysis and illustration. The figure is based on a sample of commercial accommodation providers in the ASW.



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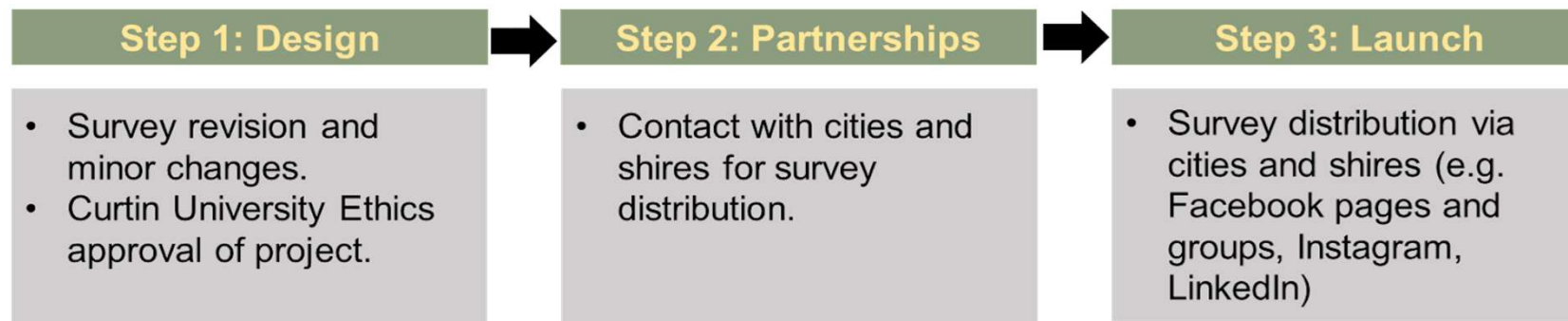
International Network  
of Sustainable Tourism  
Observatories

## 4.5 RESIDENT SATISFACTION

## Resident attitude and satisfaction

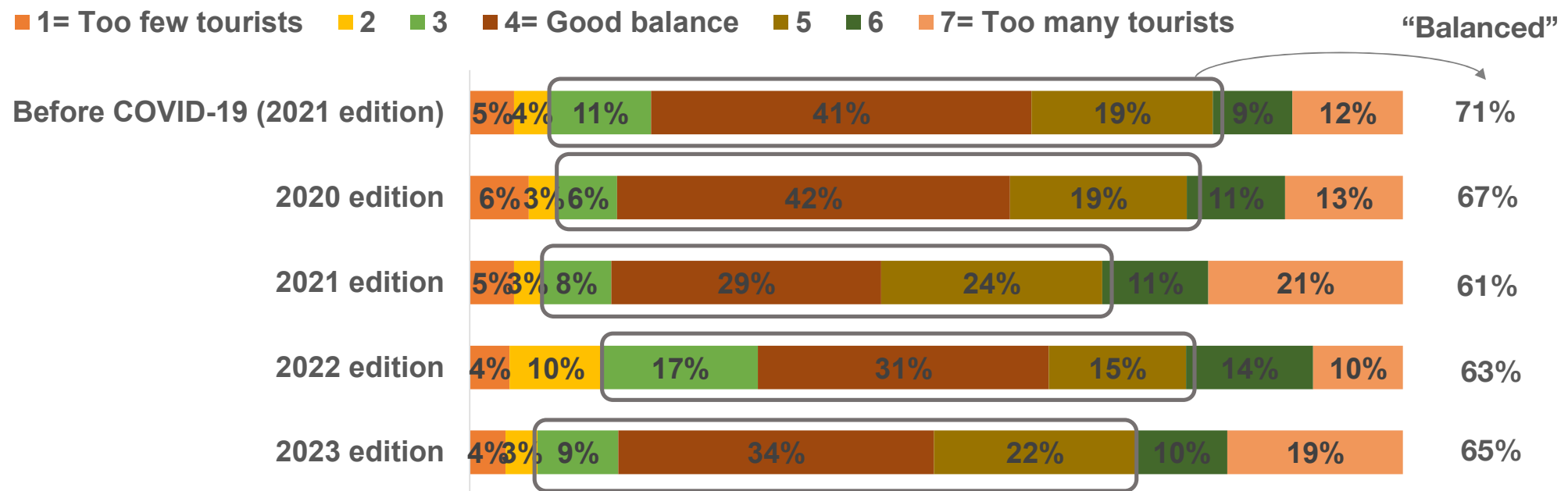
- The resident survey aims to support local stakeholders in data collection and analysis to enable evidence-based decision-making.
- The results presented here refer to the fourth edition of the survey.
- Data were collected online in December 2023, in collaboration with ASW's local governments.
- There were 786 complete responses from residents in the ASW (sample details available in the appendix).

### Steps in the implementation of the resident survey



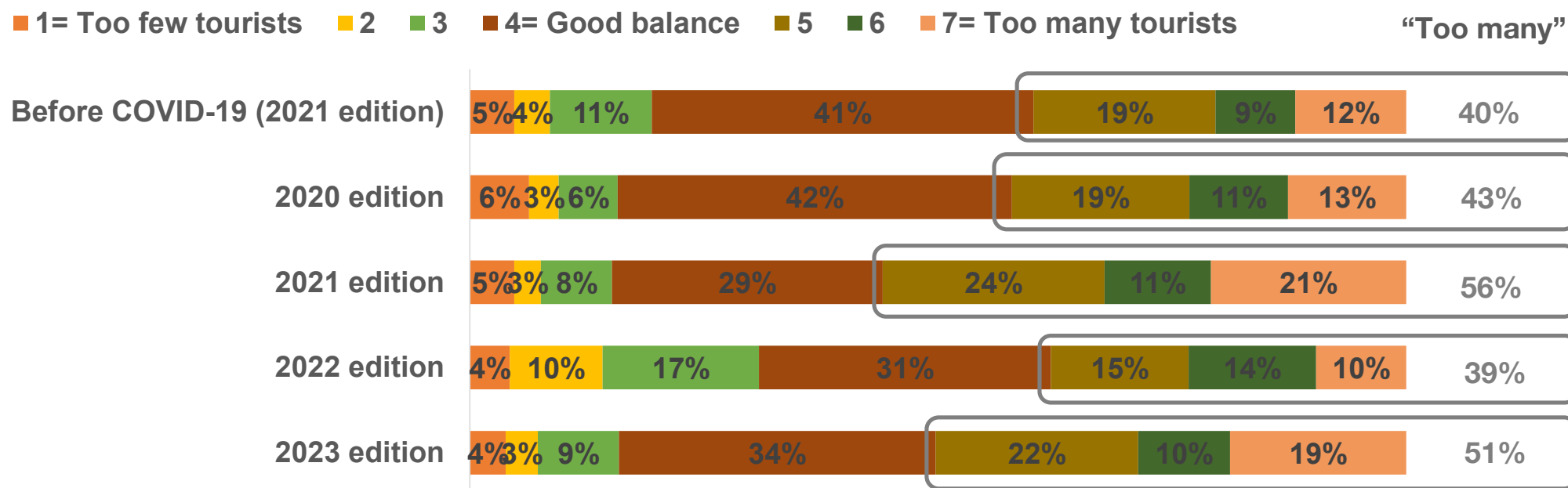
## Resident perceptions about the number of tourists

**Residents' perception of the number of tourists visiting the region 2020 - 2023**  
(‘Balanced’ responses highlighted) (for 2023: n=786)



## Resident perceptions about the number of tourists

**Residents' perception of the number of tourists visiting the region 2020 - 2023**  
(‘Too many’ responses highlighted) (for 2023: n=786)





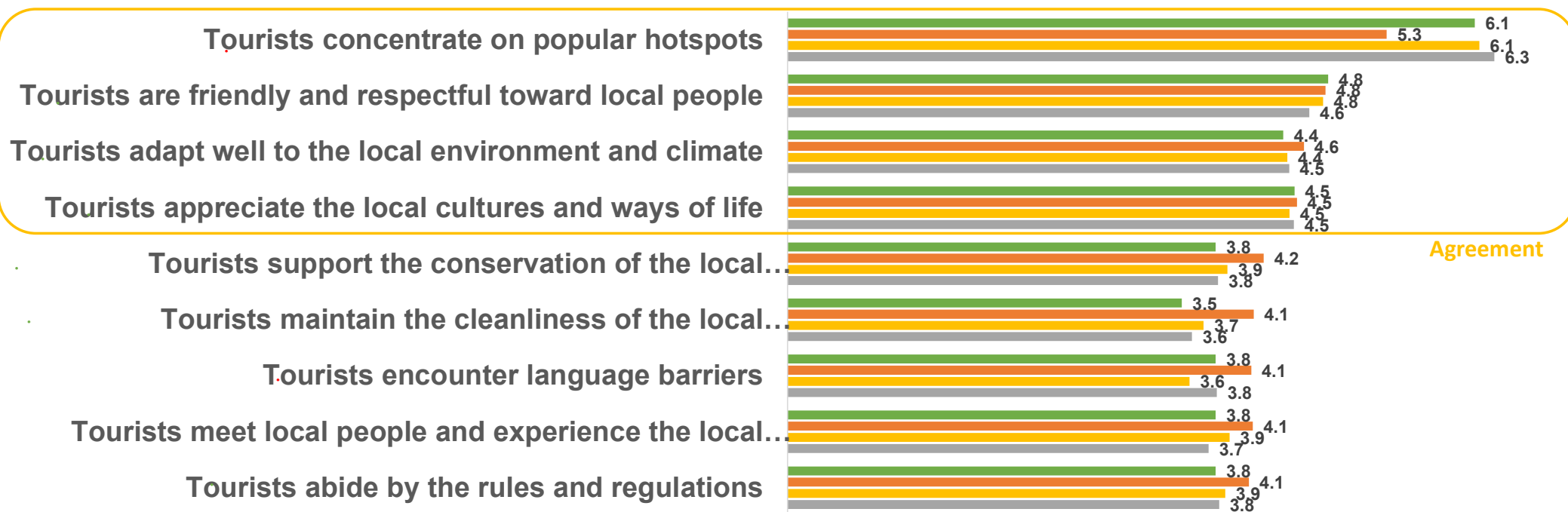
## Resident perceptions about the number of tourists

- The majority of respondents (65%) agrees that the number of tourists is **quite balanced** (these are the respondents who give an answer on or next to the mid-point of the scale).
- This share has remained **relatively consistent** over the years (between 61% and 71%).
- If we highlight those respondents perceiving there are slightly to clearly too many tourists in the region, then **a slight majority (51%) has a concern** (these are the respondents who give an answer on the three highest points of the scale).
- This is **up from 2022**, but **down from 2021**.
- Only a relatively small group of responding residents indicate that there are too few tourists (quite constant over the years, except for 2022).

## Resident perceptions of tourist behaviours

Residents' perception of tourists' behaviours in the region 2020-2023 (for 2023: n=786)

■ 2023 edition ■ 2022 edition ■ 2021 edition ■ 2020 edition



## Resident perceptions of tourist behaviours

- Respondents strongly support the observation that tourists **concentrate on popular hotspots**.
- Tourists are generally perceived as **friendly, respectful, adaptive to the local environment and appreciative of local cultures**.
- Respondents show slightly **less agreement** with the statements that tourists **support the conservation and cleanness of the local environment**.
- The results are similar to previous years (with slightly different results in 2022).

## Resident perception of tourism impacts

### Residents' perception of tourism impacts in the region 2020-2023 (for 2023: n=786)

■ 2023 edition ■ 2022 edition ■ 2021 edition ■ 2020 edition



Agreement

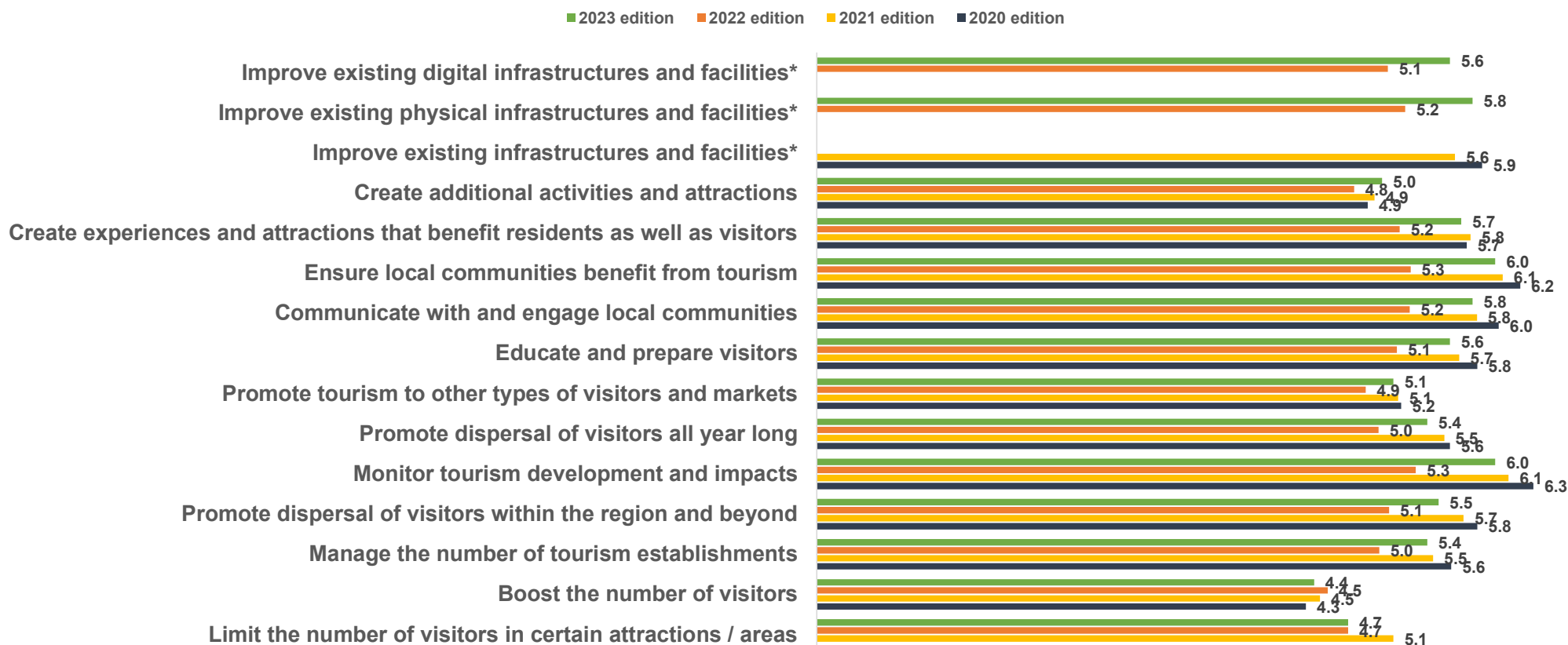
## Resident perception of tourism impacts

- **Positive economic contribution of tourism** is greatly valued (job creation, support of local activities such as shops, services, festivals and events, and investment attraction, creates a market for local produce).
- Perceived importance of tourism in **creating a lively and positive atmosphere**.
- **Concerns – mainly cost-related**: Perception that tourism increases housing prices, increases the cost of land, reduces housing affordability for first home buyers, increases the cost of services, creates overcrowding in streets/shops/means of transport and can also cause some damage to the local environment.
- Residents feel that tourism **does not improve public transport availability**.
- Tourism does **not make locals feel unsafe**.



## Resident perception of tourism impacts management

### Residents' perception of tourism impacts management 2020-2023 (for 2023: n=786)



## Resident perception of tourism impacts management

- The most strongly supported management measures include **monitoring tourism development and its impacts** and **ensuring that local communities benefit from tourism**.
- Strong support expressed also towards **communicating more with local communities, improving the existing physical and digital infrastructure, educating visitors and creating experiences and attractions that benefit residents as well as visitors**.
- Limited agreement with the idea of boosting the number of visitors.

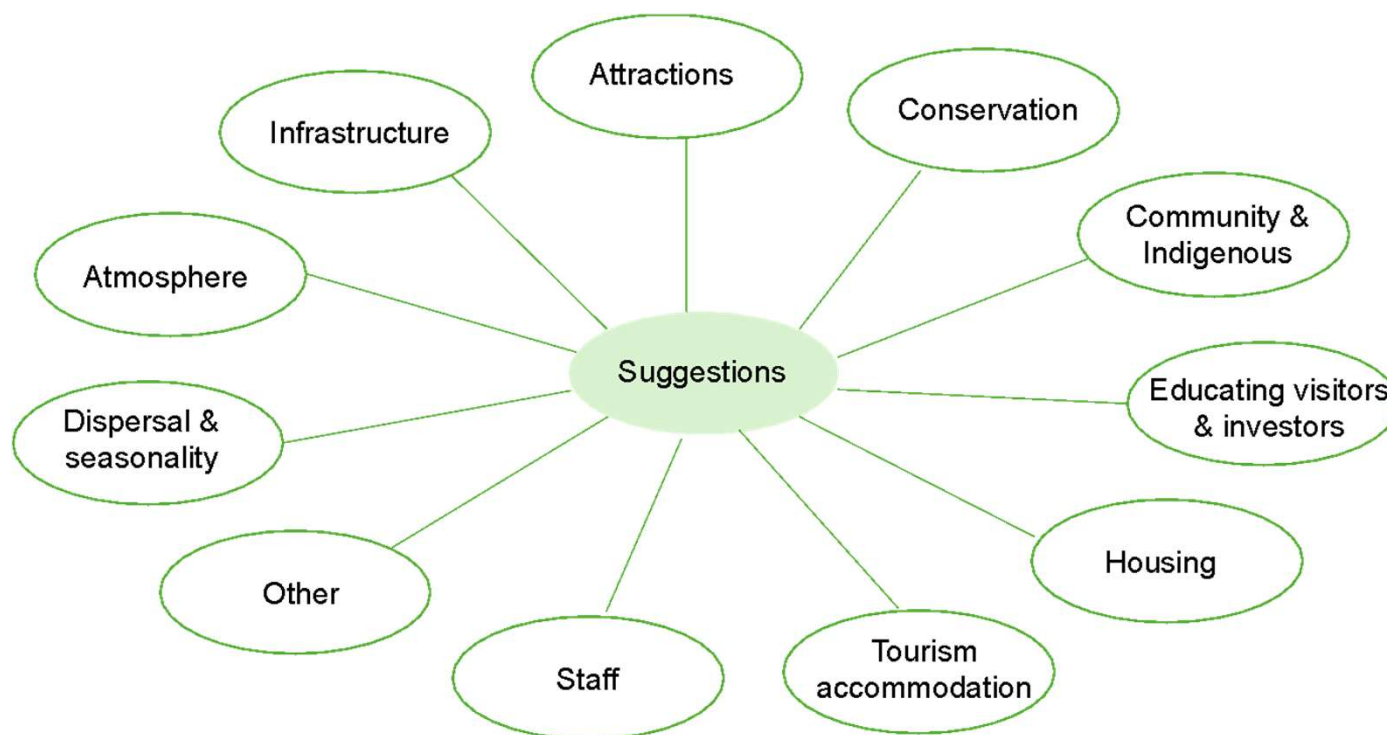
## Suggestions from residents

### Overview of main areas of respondent suggestions (2023)

**Participants were asked to comment on an open-ended question:**

*What in your view are the critical areas for development required to capture the future opportunities for tourism in your region?*

More details about responses and statement examples are available in the Appendix.



## 4.6 SUSTAINABILITY AND CLIMATE ACTION

## Climate trends in the ASW

### Climate projection summary – South Western Flatlands region

Summary of projections for the South Western Flatlands region of WA, for two time periods (2030 and 2090) and for two emissions scenarios (RCP4.5 and RCP8.5) compared with 1986–2005

Variable		Current (1986–2005)	2030		2090	
			RCP4.5	RCP8.5	RCP4.5	RCP8.5
Annual rainfall			-13 to 0% (minor difference between scenarios)		-22 to -1%	-36 to -2%
Extreme rainfall and drought			Under all emissions scenarios, the time spent in drought is projected to increase. The intensity of heavy rainfall events is also projected to increase with medium confidence.			
Average temperatures			+0.8 °C (0.5 to 0.9)	+0.8 °C (0.5 to 1.1)	+1.7 °C (1.2 to 2.0)	+3.4 °C (2.6 to 4.0)
Frequency of hot days in Perth	Days over 35 °C	28 days	36 days	-	43 days	63 days
	Days over 40 °C	4 days	6.7 days	-	9.7 days	20 days
Fire weather (average number of days with a 'severe' fire danger rating)		4.2 days	5 days (19% ↑)	4.7 days (12% ↑)	5.3 days (26% ↑)	6.9 days (64% ↑)
Sea level rise			+0.07 to 0.17 m (minor difference between scenarios)		+0.28 to 0.65 m	+0.39 to 0.85 m

Climate projections for 2030 and 2090 in the ASW forecast:

- A decrease in annual rainfall with increasing droughts.
- An upward trend in average temperatures, where more days are rated with 'severe' fire danger.
- Higher sea levels.

Source: Department of Water and Environmental Regulation (2021).



## Climate trends in the ASW

### Top 10 tourism sites by risk score in Western Australia

Rank	Tourism site	Score	Category	Flood	Rain	Wind	Storm	Hail	Heat	Drought	Bushfire
1	Kalbarri National Park	41	Rainforest / National Park								
2	Karijini National Park	39	Rainforest / National Park								
3	Cable Beach	34	Beach								
4	Purnululu National Park	34	Rainforest / National Park								
5	Margaret River wine region	32	Vineyard / Garden								
6	Turquoise Bay	30	Beach								
7	Busselton Jetty	29	Scenic Road / Railroad								
8	Kings Park and Botanic Garden	29	Vineyard / Garden								
9	Ningaloo Reef	25	Beach								
10	Shark Bay	25	Beach								

Source: Zurich Resilience Solutions, Mandala Analysis in Zurich & Mandala (2024).

- Wind and heat are the major sources of risk in Western Australian tourism sites.
- Two of the most impacted tourism sites by risk score in Western Australia are in the ASW: the Margaret River wine region and the Busselton Jetty.
- In the Margaret River Region, major sources of risk are bushfires followed by rains and droughts.
- For the Busselton Jetty, the major source of risk are floods followed by rains.

## Sustainability standards in the ASW

- Businesses in the ASW mainly engage with two organisations when seeking sustainability improvement and recognition: Tourism Council Western Australia (TCWA) and Ecotourism Australia (EA).



Image courtesy of Tourism Western Australia

## Sustainability standards – TCWA Sustainable Tourism Accreditation

The Sustainable Tourism Accreditation program is run by Tourism Council Western Australia (TCWA).

The aim of the program is to guide businesses in adopting best practices across all aspects of sustainable tourism operations including:



- Environmental Management
- Social & Cultural Responsibility
- Codes of Ethics and Professional Conduct
- Customer Service, Safety & Protection
- Staff Wellness and Human Resources
- Sustainable Business Operation
- Social and Regulatory Licencing Compliance
- Sustainable Tourism Marketing & Promotion

**>300**

accredited businesses  
in the ASW

Approximately

**1,300**

accredited businesses  
in Western Australia

Source: Tourism Council Western Australia (2025). Own illustration.

## Sustainability standards – TCWA Tourism Emissions Reduction Program

TCWA launched the Tourism Emissions Reduction Program for businesses in 2024 .

The program is structured in three stages:



### Stage 1: Commit

- Calculate emissions from various sources, understand where emissions are created, and identify focus areas for reduction.

### Stage 2: Reduce

- Develop an action plan to adjust operations and start cutting emissions, including unique actions and timeframes.

### Stage 3: Avoid

- Create a plan to adopt renewable energy and set a future date for transition.



Source: Australian Tourism Industry Council (2025).



## Sustainability standards – TCWA additional initiatives

TCWA has two additional sustainability-focused initiatives:

**EcoStar Accreditation** – Helps businesses achieve environmental sustainability. The standards to be accredited include the following:

- Managing impact and disturbance on the environment.
- Contributing to conservation and sustainability.
- Effective interpretation through the promotion, communication, and delivery of the product.
- Establishing an environmental risk management strategy.
- Supporting and benefiting the local community.
- Recognition of the cultural and heritage issues of the area.

**Connecting to Culture Toolkit** - practical tool to engage respectfully and confidently with First Nations culture and communities. It covers cultural protocols, product and service representation, visitor experience, cultural awareness, employment and land rights and native title.

More information available at: <https://tourismcouncilwa.com.au/programs-accreditation/>



## Sustainability standards – Ecotourism Australia Certification

For businesses, Ecotourism Australia (EA)'s overarching certification programs are:

### ECO Certification

- The program certifies nature and ecotourism tours, accommodations and attractions.
- There are three certification levels: Nature Tourism, Ecotourism and Advanced Ecotourism.

### Sustainable Tourism Certification

- The program certifies operators in non-nature-based spaces who focus on sustainable practices.
- There are two certification levels: Sustainable Tourism and Advanced Sustainable Tourism.

Both certifications cover the following sections:

- Business management and operational planning
- Responsible marketing
- Customer satisfaction
- Environmental management
- Interpretation and education
- Contribution to conservation
- Working with local communities
- Cultural respect and sensitivity



## Sustainability standards – Ecotourism Australia Certification

Additionally, businesses can opt for a specialty program:

### Respecting our Culture Certification

- Encourages businesses to operate in ways that respect and reinforce Indigenous cultural heritage and the living cultures of Indigenous communities.

### Eco Guide Certification

- Recognises guides who deliver authentic, environmentally responsible and professional experiences.

### Climate Action Certification

- Focuses on reducing carbon emissions and assuring travellers that certified products are backed by a commitment to sustainable practices related to addressing climate change.
- Areas covered by the certification include:
  - Identify sources of emissions
  - Measure and collect data through a credible emissions calculator
  - Establish a base year to enable year-on-year emissions measurement for continuous improvement and benchmarking
  - Set strategies to reduce emissions
  - Participate in a verified offsetting scheme
  - Develop Climate Action adaptation strategies

More information available at: <https://ecotourism.org.au/sustainability/businesses/>



## Sustainability standards - Ecotourism Australia Certification in the ASW

- There are 24 businesses in the ASW that have been certified by Ecotourism Australia.
- Most of them have received the ECO certification.
- Regarding location, most certified businesses are located either in Augusta-Margaret River or Busselton.

**24**  
certified businesses  
in the ASW  
accounting for  
32% of all  
certified operators  
in WA

### Certified businesses in the ASW per certification type

- ECO Certification: 22 operators (9 in Nature Tourism, 7 in Advanced Ecotourism and 6 in Ecotourism)
- Climate Action Certification: 1 operator
- Sustainable Tourism Certification: 2 operators
- ROC Certification: 1 operator

### Certified businesses in the ASW per Council

- Augusta-Margaret River Shire: 11 operators
- City of Bunbury: 1 operator
- City of Busselton: 10 operators
- Denmark Shire: 1 operator
- Manjimup Shire: 1 operator

\* Businesses can hold Climate Action and/or ROC on top of their ECO or Sustainable Tourism Certification (i.e. multiple certifications).  
Source: Ecotourism Australia (2025). Own illustration.

## Sustainability standards – Ecotourism Australia Certification

For destinations, EA's certification programs are:

### **ECO Certified Destination**

- For destinations prioritising nature-focused experiences, national parks and reserves, with a commitment to preserve nature and landscapes.

### **Sustainable Tourism Certified Destination**

- For urban destinations with a focus on sustainability.

In 2022, the Shire of Augusta-Margaret River became the first ECO Certified destination in Western Australia and one of four ECO Certified destinations in Australia at the time. It remains the only certified WA destination.

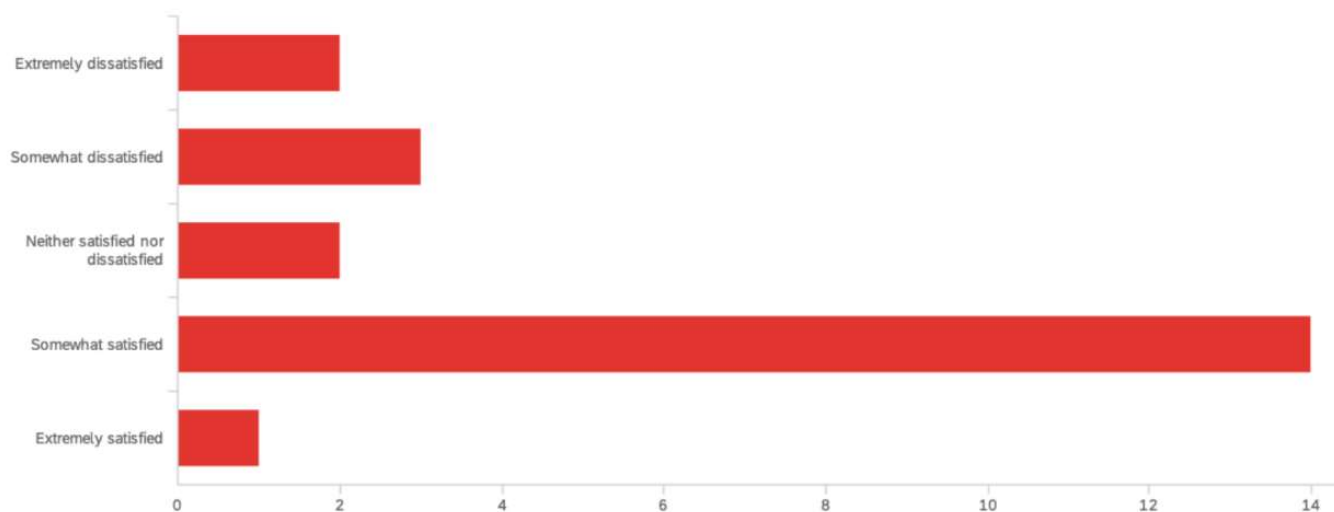


## 4.7 INCLUSION AND ACCESSIBILITY



## Travel experiences of people with disabilities in the ASW

### Satisfaction with travels to the ASW (n=42 people with disabilities or carers)



Source: Own elaboration. Data collected in 2022 via an online survey targeting (i) people with disabilities who had previously travelled or would consider travelling to the ASW and (ii) family, close friends and carers of those with a disability, if the disabled person in question was unable to answer the survey themselves. The complete results of this survey are included in the previous edition of this report (Volgger et al., 2023).

About 64% of people with disabilities (or their carers) were somewhat satisfied with their travels to the ASW.

Key factors motivating them to choose the ASW included:

- Convenience of travel (86%).
- Word of mouth, good reviews from people who had visited (73%).
- Having friends and family who lived in region (64%).
- Bucket list appeal of the destination (50%).

## Travel experiences of people with disabilities in the ASW

### Satisfaction with average accessibility of tourism offers in the ASW (n=42 people with disabilities or carers)

Services/Products	Extremely dissatisfied	Somewhat dissatisfied	Neutral	Somewhat satisfied	Extremely satisfied
Accommodation					
Dining					
Nature places					
Access to tours					
Museums					
Public spaces					
Accuracy of info					
Ease of planning					

Key	10%	20%	30%	40%	50%
-----	-----	-----	-----	-----	-----

- The accessibility of public spaces and museums triggered a significant level of satisfaction in people with disabilities in the ASW.
- The biggest disappointments occurred primarily with access to tours, followed by the accessibility of accommodation, nature places, accuracy of information and ease of planning.

Source: Own elaboration. Data collected in 2022 via an online survey targeting (i) people with disabilities who had previously travelled or would consider travelling to the ASW and (ii) family, close friends and carers of those with a disability, if the disabled person in question was unable to answer the survey themselves. The complete results of this survey are included in the previous edition of this report (Volgger et al., 2023).

## Inclusion and accessibility in the ASW: Available facilities

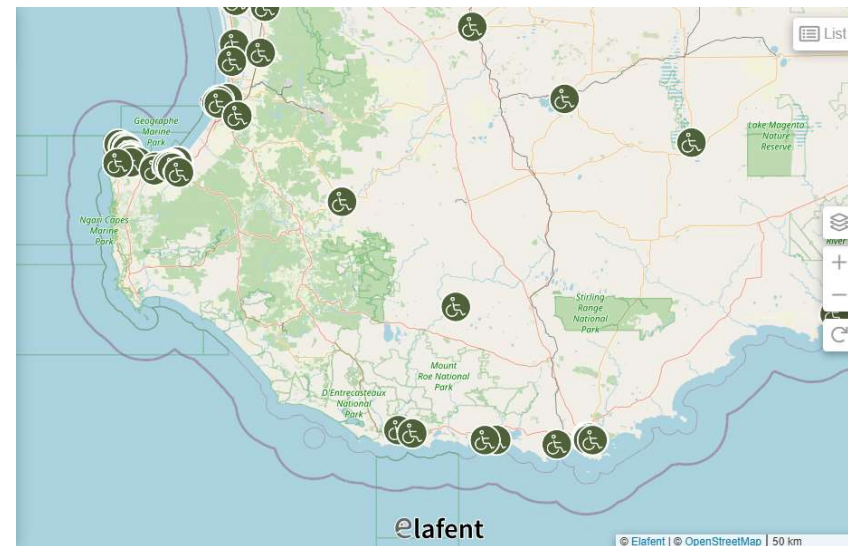
- A total of nine beach wheelchairs were recorded in the ASW.
- Accessible public toilets were recorded throughout the region, specially around Busselton, Bunbury, Dunsborough and Albany.

### Beach wheelchairs



Source: Tourism WA (2025a).

### Accessible public toilets



Source: Tourism WA (2025a).

## Inclusion and accessibility in the ASW: Available facilities

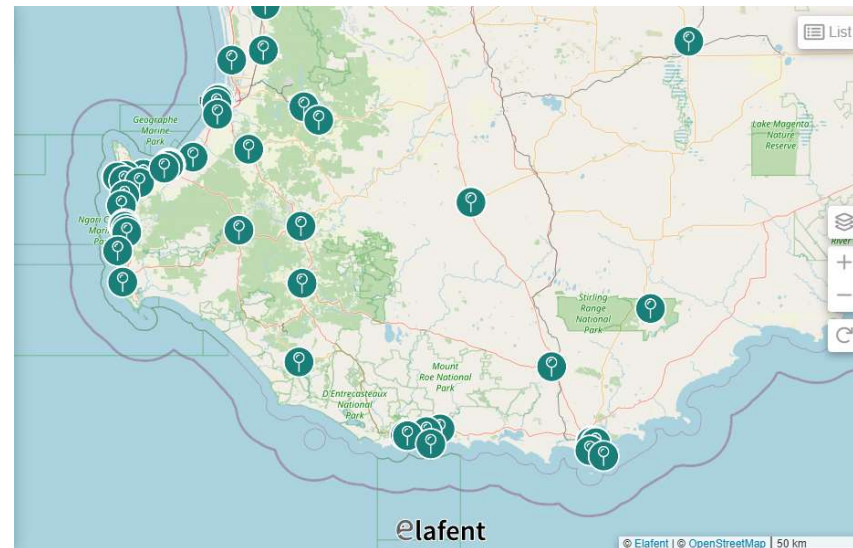
- There are accessible visitor centres throughout the whole region.
- Accessible attractions were recorded throughout the region, specially around Margaret River, Busselton, Bunbury, Albany and Walpole.

### Accessible Visitor Centres



Source: Tourism WA (2025a).

### Accessible attractions



Source: Tourism WA (2025a).



## Accessibility resources and accreditation

Tourism Council Western Australia (TCWA) has several tools and resources to help businesses in WA and the ASW improve their accessibility:

- **Online assessment tool**

The assessment benchmarks the current accessibility of the business and provides it with an Accessibility Information Guide for guests and an Internal Report for further action.

- **Accessible tourism workshops**

Online and in-person workshops on topics such as identifying ways to improve accessibility or providing inclusive information to guests.

- **Free on-site assessments by Spinal Life Australia**

Complimentary assessment for members to get feedback to enhance their accessibility.

- **Accessible Tourism Accreditation**

The program helps businesses improve and communicate their accessibility, providing accredited businesses with brand marks. It considers five areas: low hearing, cognitive/autism, limited mobility, mobility aids and low vision.



Image courtesy of Tourism Western Australia



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of Sustainable Tourism  
Observatories

## 4.8 WATER MANAGEMENT



## Water initiatives in the ASW

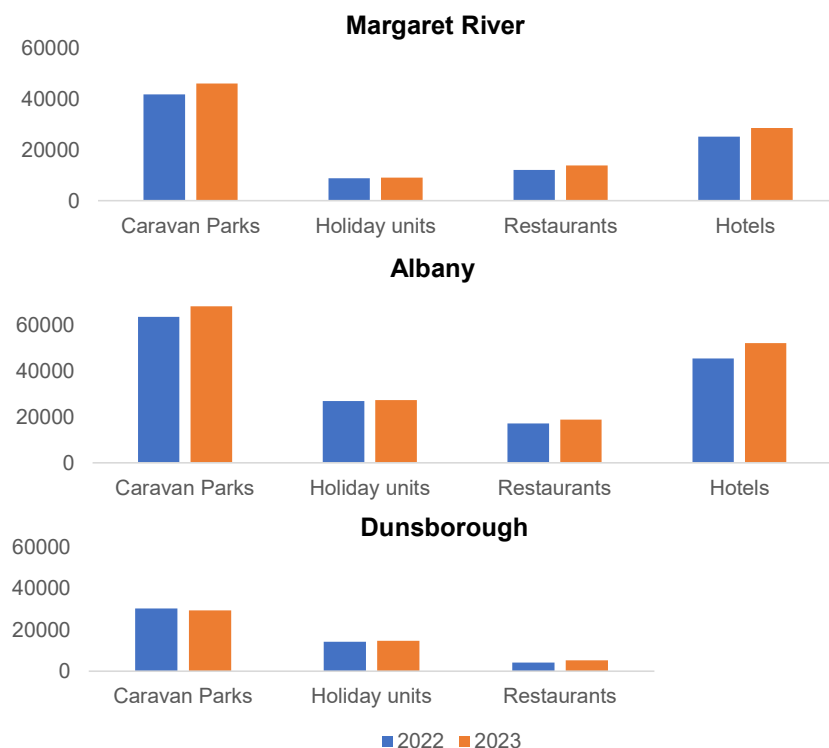
- With increasing drought periods in the ASW, water efficiency in the ASW is crucial.
- Initiatives in the region (Water Corporation, n.d.) primarily focus on:
  - Reducing water use
  - Developing new water sources
  - Increasing water recycling
- A key initiative is the Waterwise Business Program, which supports businesses to save water via water efficiency, water recycling and new technologies. All businesses that use over 20,000 kL of water per year are required to participate in the program. Examples of tourism-related participating businesses are airports, caravan parks, hotels, retail shopping centres and tourist attractions (Water Corporation, 2025).



Image courtesy of Tourism Western Australia

## Water consumption

**Average water consumption (kL) per account for tourism-related land uses in the ASW, 2022-2023**

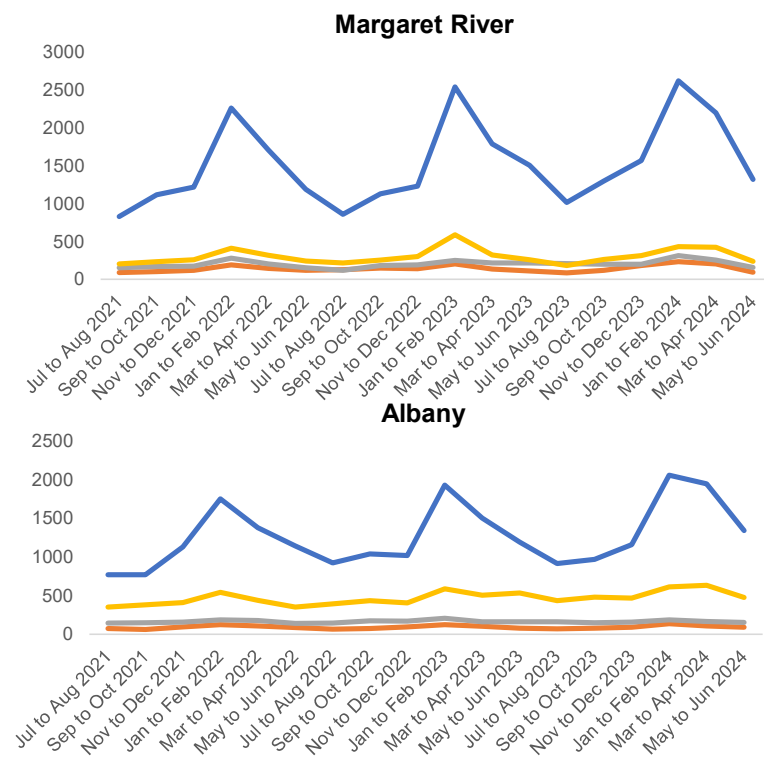


Source: Water Corporation (2025). Own analysis and illustration.  
Hotels in Dunsborough excluded from analysis due to sample size.

- Across tourism-related land uses, caravan parks are the category with the highest average water consumption in the ASW in 2022-2024, followed by hotels in the case of Margaret River and Albany. In Dunsborough, restaurants follow caravan parks in average water consumption.
- Water consumption has tended to increase in caravan parks, holiday units, restaurants and hotels in the ASW from 2022 to 2023.
- Exceptions to this trend are caravan parks in Dunsborough, where water consumption marginally decreased from 2022 to 2023.

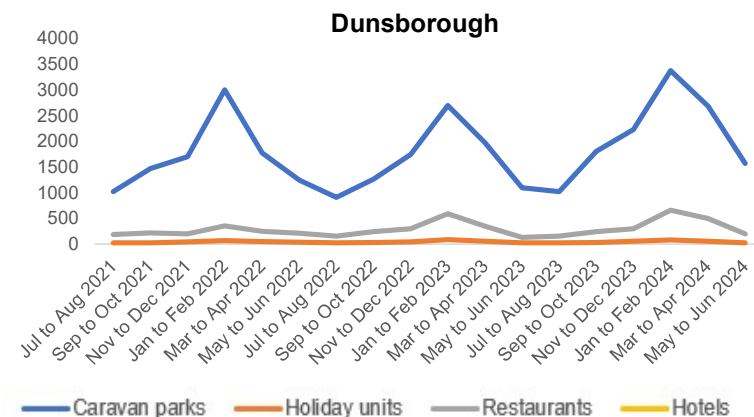
## Water consumption

**Average water consumption (kL) per account for tourism-related land uses in the ASW, bimonthly Jul-Aug 2022 to May-Jun 2024**



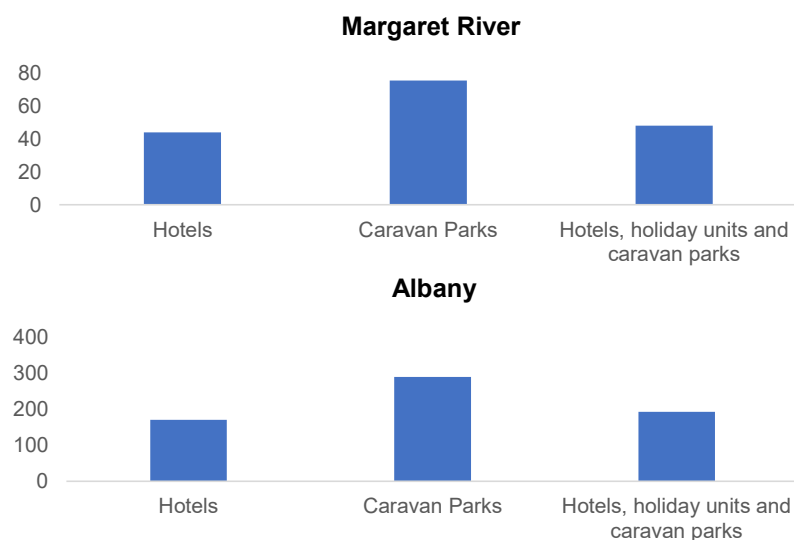
Source: Water Corporation (2025). Own analysis and illustration.  
Hotels in Dunsborough excluded from analysis due to sample size.

- Water consumption throughout the year generally follows tourism seasonality trends in the region, with peaks in the summer months of January and February. The lowest water consumption values are found in the winter months of July and August.
- The trend mentioned is particularly pronounced for hotels and caravan parks, whereas restaurants and holiday units show milder seasonal variations.



## Water consumption per visitor night

### Average water consumption (litres) for accommodation land uses per visitor night in the ASW, 2023



- Both in Margaret River and Albany, average water consumption per visitor night in caravan parks is higher than that of hotels.
- It should be noted that these locations are not directly comparable due to differences in number and composition of water accounts included in each case. Based on available data, the value shown is likely to underestimate the true water consumption (see Appendix for details).

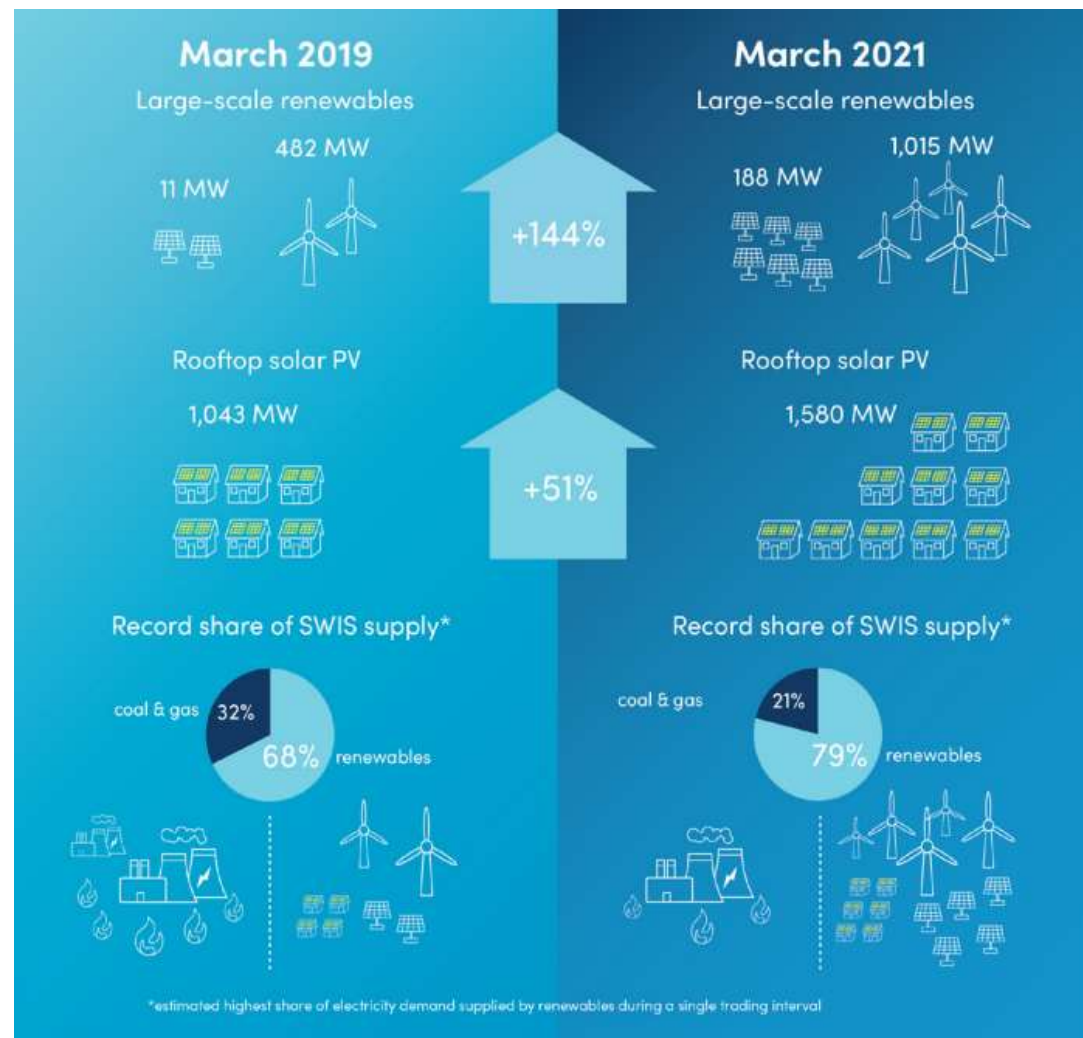
Source: Water Corporation (2025) and Tourism WA based on TRA (2025). Data shows the average water consumption in hotels, holiday parks and caravan parks divided by the total visitor nights in each location per accommodation type. Own analysis and illustration.

## 4.9 ENERGY MANAGEMENT



## Energy management

- The WA Energy Transformation Strategy commenced in 2019 and is the leading document in the sustainable energy path for the state and the ASW. The Strategy is currently in its second stage 2021-2025 (Energy Policy WA, 2021).
- From 2019 to 2021:
  - The amount of large-scale renewable capacity connected to the South West Interconnected System (SWIS) has more than doubled.
  - Rooftop solar PV generation connections have increased by 51%. Around one in three homes and businesses have rooftop solar panels, a figure that is expected to grow to around one in two by 2030.
  - The share of renewable supply in the SWIS has reached a new record, with 79% of demand being supplied by renewables during a single trading interval in March 2021.



Source: Energy Policy WA (2021).



## Energy management

### Shire of Augusta-Margaret River

- Following the Shire of Augusta-Margaret River Climate Action Plan (2020), energy consumption across the region has generally increased due to population growth, expanding tourism, and intensified agricultural activities.
- In the more recent Climate Adaptation Plan 2024-2023 Towards Resilience (2024), sustainable transportation, clean energy and energy efficiency are identified as part of the mitigation actions to address climate change in the region.
- Tourism and viticulture activities are relevant energy consumers in the region; therefore, the implementation of energy-saving measures is of relevance (Shire of Augusta-Margaret River, 2020).

### City of Busselton

- Based on the City of Busselton Energy Strategy 2020-2025 (2019), energy targets adopted are:
  - To generate 100% of the City of Busselton's electricity needs from renewable sources by 2030.
  - To reduce City of Busselton's corporate carbon emissions per capita to 50% on 2017/18 levels by 2030.
  - To develop efficiency targets for fleets and plants by 2025.
- Some key achievements so far are:
  - Installation of PV solar systems on several community facilities.
  - Partnership with Western Power and Synergy to install a Tesla community battery PowerBank in Shovelboard Way, Vasse.
  - Partnership with RAC to deliver EV chargers at Dunsborough and Busselton Foreshore.

## Energy management



Image courtesy of Tourism Western Australia

- The most common practices for tourism enterprises in promoting sustainable energy management include reducing energy use by using energy-efficient lighting and electronic appliances, installing renewable energy sources, particularly solar panels, using energy-efficient reverse cycle air conditioning and providing natural insulation to reduce the need for heating or cooling.
- Some of the tourism enterprises practising these strategies include the Busselton Jetty, the Margaret River Recreation Centre, Turner Caravan Park, Flinders Caravan Park, RAC Busselton Holiday Park WA, Cullen Wines, Karridale Cottages & Hop Farm, Margaret River Retreat, Yelverton Brook Eco Spa Retreat & Conservation Sanctuary, Forest Rise Eco Retreat, 5 Rooms Retreat and Baywatch Manor Augusta.
- The Margaret River Busselton Tourism Association, which manages several attractions in the Margaret River Region, also supports sustainable energy management. The organisation has 8 hybrid vehicles in use and has installed solar power at Margaret River Visitor Centre and Lake Cave (Shire of Augusta-Margaret River, 2022).



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## 4.10 WASTE MANAGEMENT

## Waste reduction and recovery

- Sustainable waste management in the South West region follows the guidelines of the Waste Avoidance and Resource Recovery Strategy 2030 by the WA Waste Authority (Waste Authority, 2021).
- This strategy encourages businesses and local communities to work toward three objectives:
  - Avoiding, by generating less waste.
  - Recovering, by recovering more value and resources from waste.
  - Protecting, by protecting the environment through responsible waste management.
- The Strategy recognises business and industry as significant waste generators that should implement responsible waste management approaches. Businesses can make decisions to reduce the generation of waste (such as using less packaging) and increase recyclability.

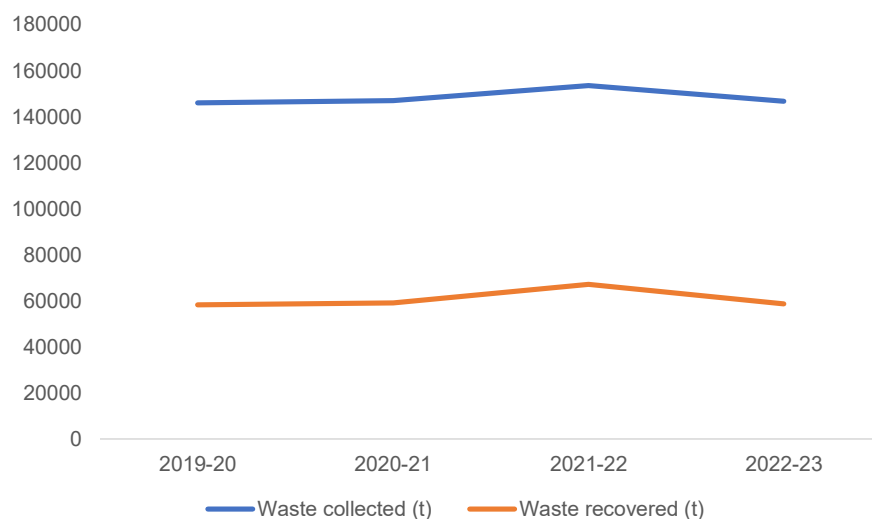


Image courtesy of Tourism Australia



## Collected and recovered waste

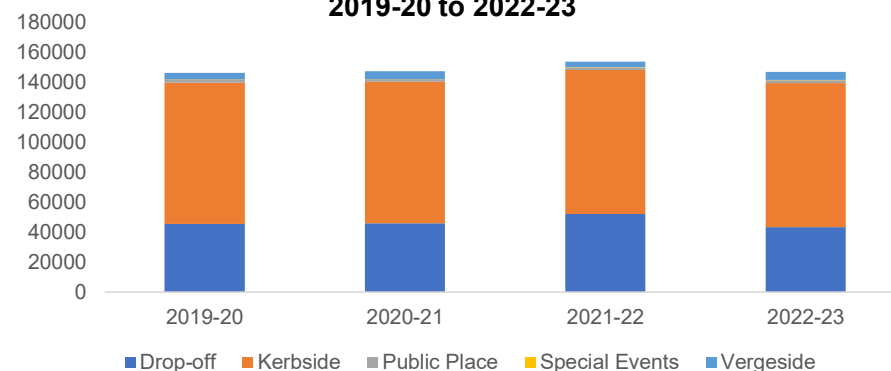
**Total weight of waste collected and recovered in the ASW  
in tonnes (t), 2019-20 to 2022-23**



Source: Department of Water and Environmental Regulation (2025).  
Own analysis and illustration.

- Waste collected and recovered in the ASW has remained relatively stable from 2019-20 to 2022-23, slightly increasing until 2021-22 and decreasing thereafter.
- Most waste collected comes from kerbside followed by vergeside.

**Waste collected by service type in tonnes (t) in the ASW,  
2019-20 to 2022-23**

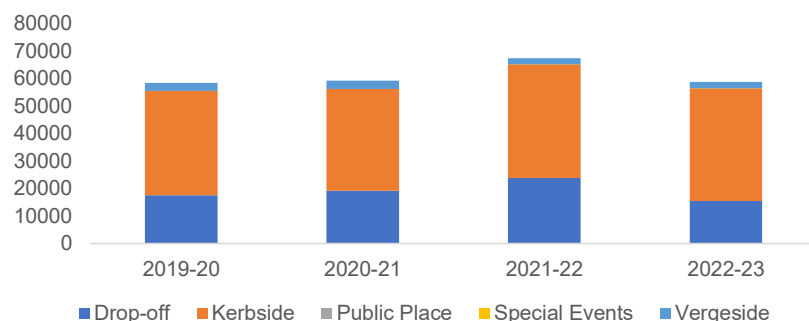


Source: Department of Water and Environmental Regulation (2025).  
Own analysis and illustration.

## Recovered waste

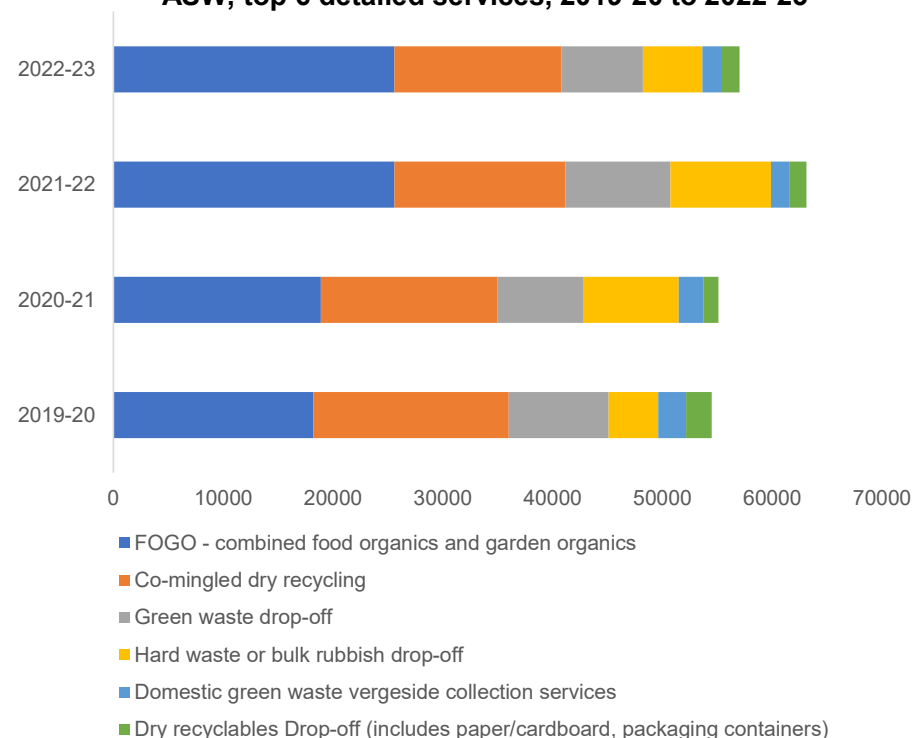
- Similar to waste collected, most waste recovered comes from kerbside followed by vergeside.
- The top six services of waste recovery by total tonnes were FOGO - combined food organics and garden organics, co-mingled dry recycling, green waste drop-off, hard waste or bulk rubbish drop-off, domestic green waste vergeside collection services, and dry recyclables drop-off.

**Waste recovered by service type in tonnes (t) in the ASW, 2019-20 to 2022-23**



Source: Department of Water and Environmental Regulation (2025).  
Own analysis and illustration.

**Waste recovered by detailed service in tonnes (t) in the ASW, top 6 detailed services, 2019-20 to 2022-23**



Source: Department of Water and Environmental Regulation (2025).  
Own analysis and illustration.



## 5. CONCLUSIONS

## Conclusions

- This report by the Australia's South West Sustainable Tourism Observatory explored trends and actions in key sustainability areas that are relevant for tourism development in the Australia's South West Tourism Region: tourism governance, tourism seasonality, tourism employment, destination economic benefits, resident satisfaction, sustainability and climate action, inclusion and accessibility, water management, energy management, and waste management.
- Although the significance of implementing sustainable tourism practices is recognised among the tourism stakeholders and actions have been taken, there is still room for improvement in several areas.

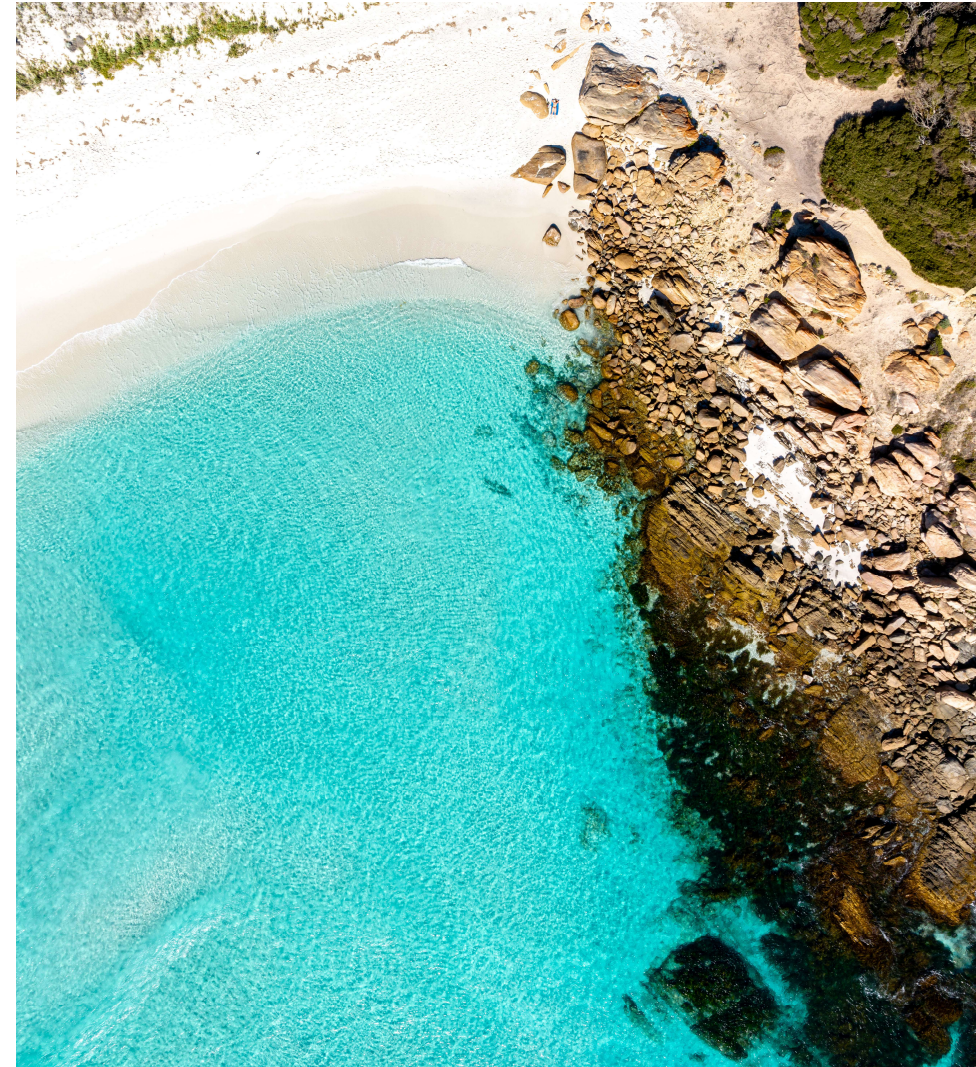


Image courtesy of Tourism Western Australia

## Conclusions

- **The Australia's South West remains a top tourism destination.** In YE June 2024, the region received 3.3 million overnight visitors (28% of all overnight visitors to Western Australia) and 3.7 million daytrip visitors (20% of all daytrip visitors to WA). As such, tourism is a relevant source of employment in the region (ranking 6th and contributing to 8.1% of total jobs), where employing business tend to be micro and small (i.e. up to 19 employees).
- **As in many leisure tourism destinations, seasonality remains a challenge.** Visitation is concentrated in the summer season, although the region offers diverse experiences that make it attractive in winter as well. Over time, the gap between peak and low seasons has shown a trend toward narrowing.
- **Although residents do not perceive overall visitation numbers as overly problematic, the lack of spatial and temporal dispersal is still perceived to be a weakness of tourism development in the region.** The most strongly supported management measures include monitoring tourism development and its impacts, and ensuring that local communities benefit from tourism.



## Conclusions

- **The ASW Tourism Destination Management Plan was launched in 2024** and outlines the tourism strategy for the next 10 years. With sustainability as a guiding principle, the plan features the goal to *strengthen capacity and capability to support sustainability in the region*. In line with the findings highlighted, one of its initiatives is to promote visitor dispersal in the region.
- **In terms of environmental impact, tourism is a relevant consumer of energy and water, and it also contributes to generating waste.** Some initiatives in the region are targeting these aspects, such as the Waterwise Business Program.
- **Climate trends in the region also represent an important challenge**, as average temperatures, the frequency of droughts and sea levels are expected to increase. Businesses in the region mainly engage with Tourism Council Western Australia and Ecotourism Australia to progress their sustainability journey and tackle their carbon emissions.

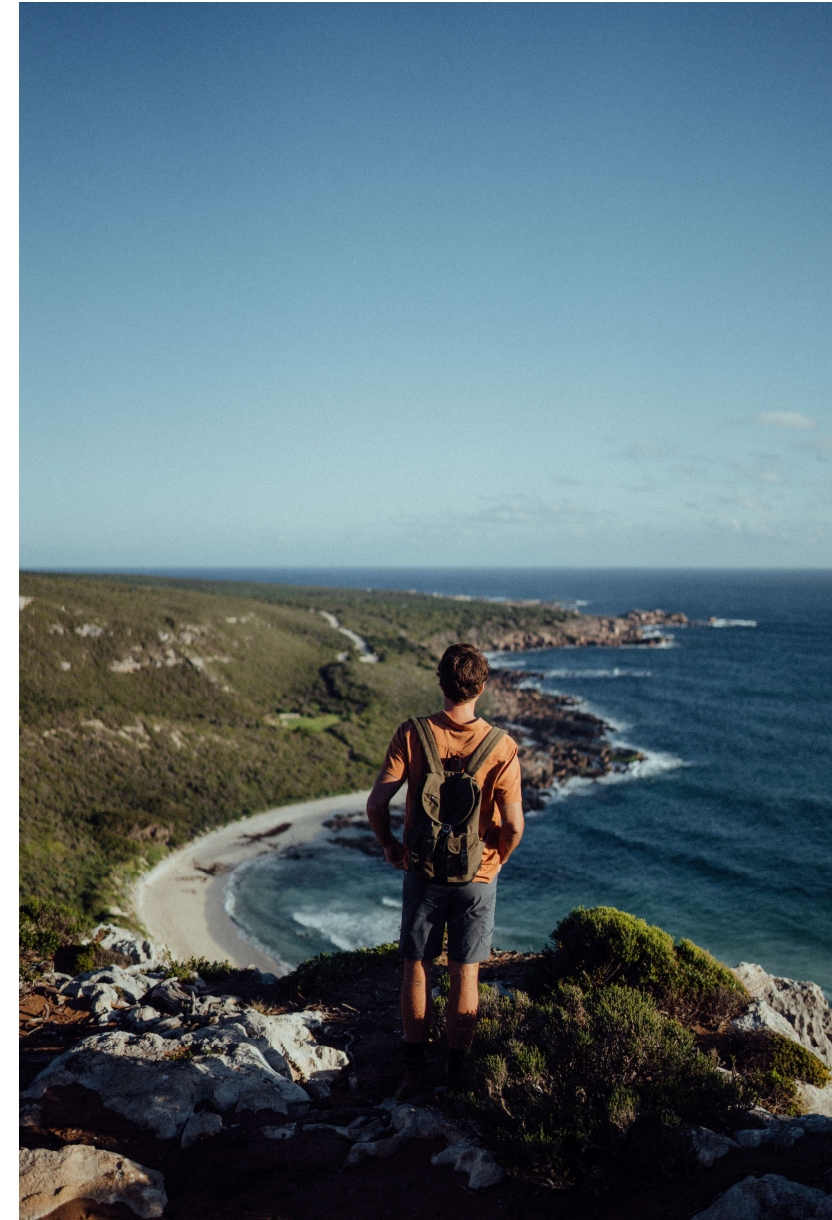


Image courtesy of Tourism Western Australia

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## 6. IMPRINT AND DISCLAIMER



## Imprint

The authors would like to thank the INSTO Network of UN Tourism (previously UNWTO) and the Government of Western Australia for their support and collaboration in the realisation of this project. We also thank Curtin University and its TRC team for backing this project.

We would in particular like to thank the organisations which supported this work with their funding and/or in-kind support: Tourism Western Australia, Australia's South West, WA Government – Department of Biodiversity, Conservation and Attractions – Parks & Wildlife Service, Royal Automobile Club of Western Australia (RAC) and the Margaret River Busselton Tourism Association.

Furthermore, we would like to thank all other partners that shared data, information and advice, or facilitated research, including but not limited to Australia's South West Regional Tourism Organisation, Cities and Shires in the Australia's South West Tourism Region, Christof Pforr and Ross Taplin from Curtin University, Department of Biodiversity, Conservation and Attractions, Department of Water and Environmental Regulation, Ecotourism Australia, STR, Tourism Council Western Australia, Tourism Research Australia, Tourism Western Australia, Water Corporation. Former partners are mentioned in the previous editions of this report.

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**The Tourism Research Cluster (TRC)** increases Curtin's tourism research capability by providing a framework for the skills, expertise and resources of researchers to be shared, increasing opportunities for collaboration and building on the strengths of Curtin's well-established multidisciplinary approach to tourism research.

Since its inauguration in 2010, the Tourism Research Cluster (TRC) has been the fundamental player in Curtin's world-class rated research in the area. The TRC is a vibrant cross-faculty research group of internationally-recognised academics. It connects industry, government and academia and also offers a gateway for students to develop research skills. Through its diverse network of tourism academics from backgrounds such as marketing, geography, management, cultural anthropology, public policy, economics, spatial sciences, and statistics, the TRC targets topical tourism issues with wide-ranging expertise. It offers its members the chance to meet and network with tourism experts worldwide, share ideas and explore collaborative opportunities.



Image courtesy of Frances Andrijich

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## 7. APPENDIX

## Appendix details

This appendix includes:

- (a) Details about the resident survey sample.
- (b) The analysis of open-ended responses with residents' suggestions in the resident survey.
- (c) Water accounts per location and land use in the water consumption analysis.

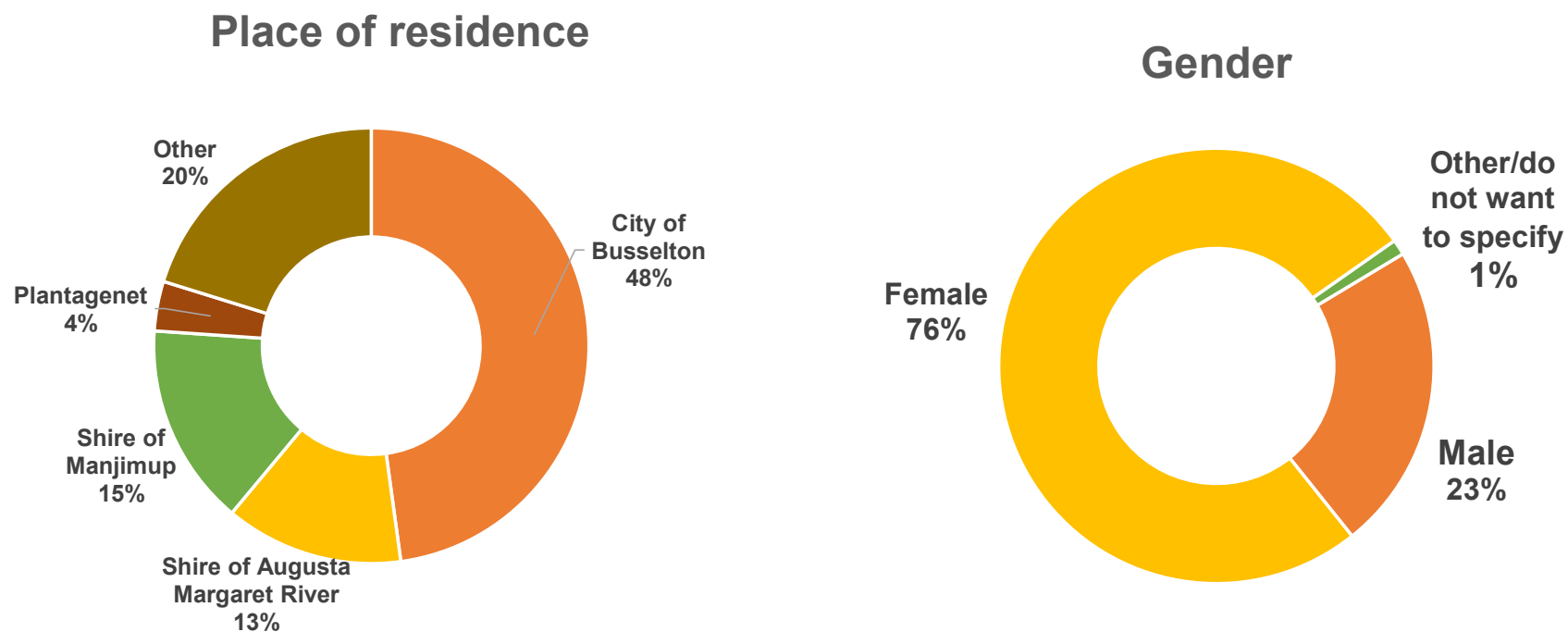


## (a) Resident satisfaction: Resident survey sample

The following pages provide details about the characteristics of the resident survey sample.

## Sample – Place of residence, gender

Figure 2. Distribution of respondents by place of residence and gender (2023, n=786)



## Sample – Place of residence, gender

### Residence

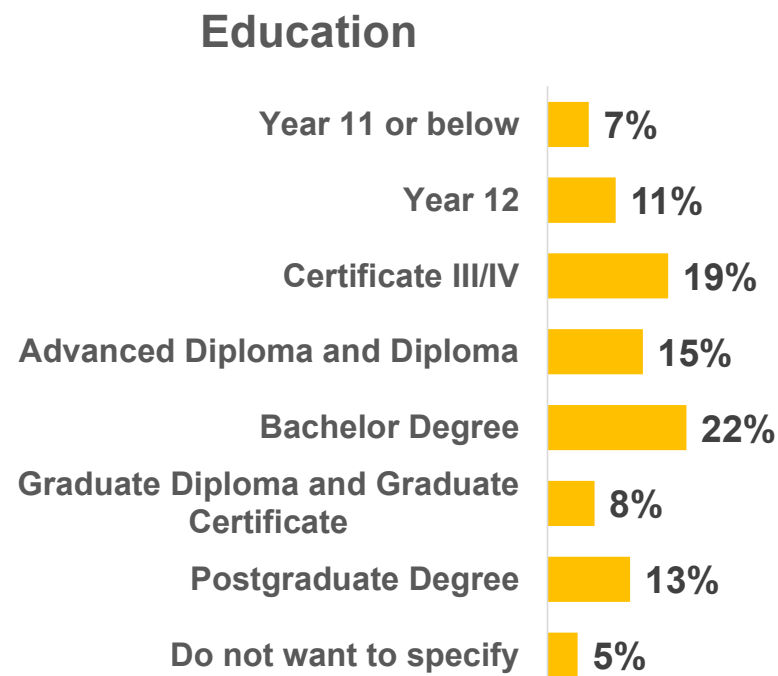
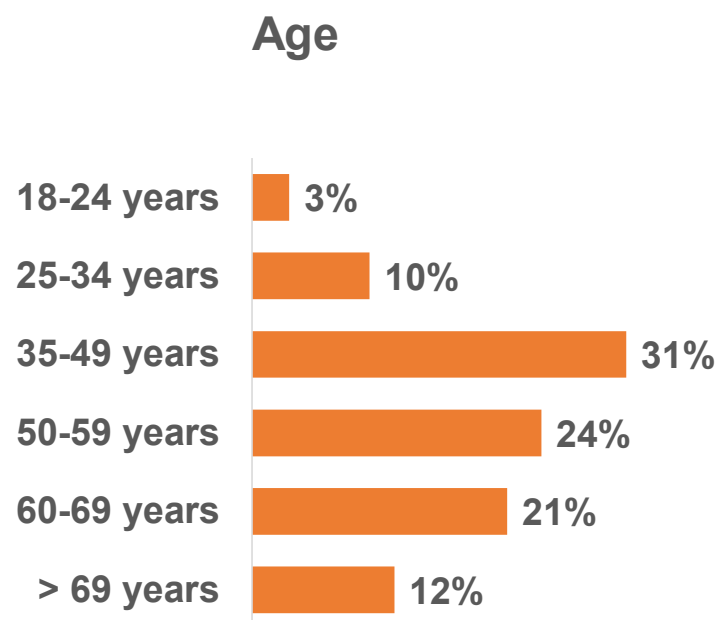
- Majority of responses from the City of Busselton (48%)
- Significant participation from the Shires of Margaret River-Augusta (13%), Manjimup (15%) and Plantagenet (4%)
- Limited responses from Albany (2%), Bunbury (0.6%) and Denmark (1%)
- Other shires (20%): Boyup Brook, Jerramungup, Bridgetown-Greenbushes, Collie, Dardanup, Donnybrook-Balingup, Gnowangerup, Kojonup, Capel

### Gender

- Three quarters (76%) female
- One quarter (23%) male

## Sample – Age, education

**Figure 3. Distribution of respondents by age and education (2023, n=786)**



## Sample – Age, education

### Age

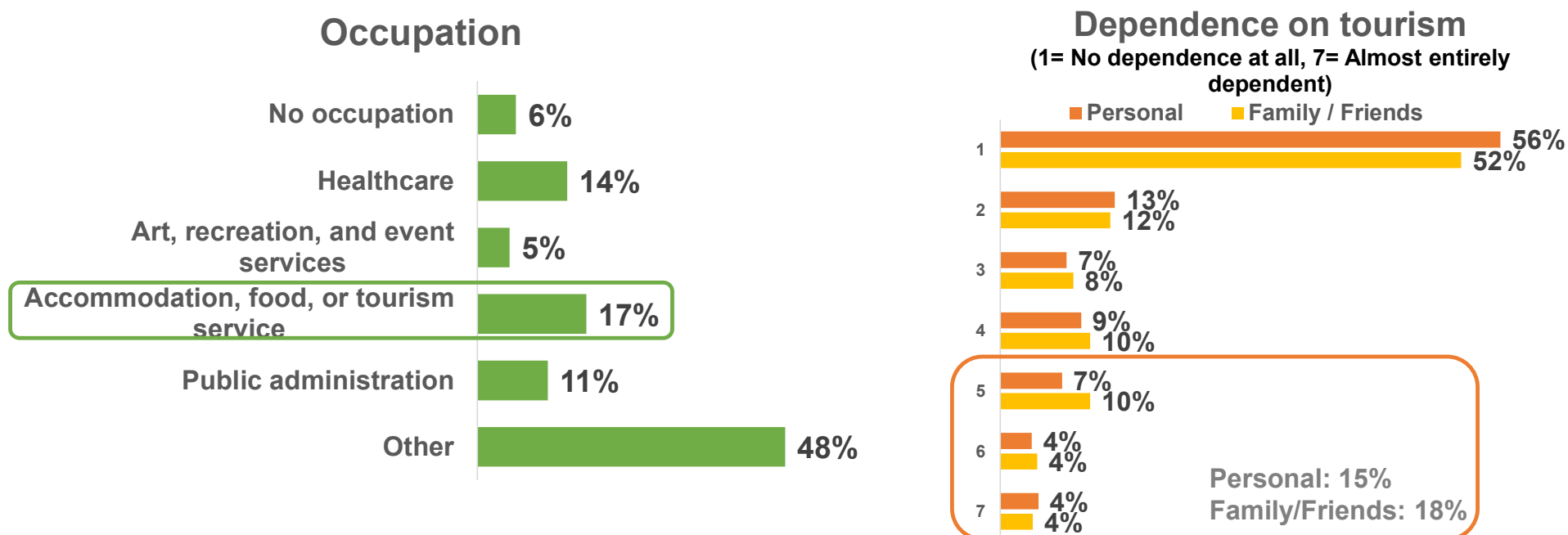
- Respondents from a variety of age groups
- Majority between 35-59 years old (55%)
- Significant participation by people above 60 (33%)
- Less participation by young people, in the age range 18-34 years (13%)

### Education

- Bachelor Degree is most commonly indicated education level (22%)
- Followed by Certificate III/IV (19%) and Advanced Diploma and Diploma (15%)
- A fair number of respondents holding a Postgraduate Degree (13%)

## Sample – Occupation, income dependence on tourism

Figure 4. Distribution of respondents by occupation and dependence on tourism (2023, n=786)





## Sample – Occupation, income dependence on tourism

### Occupation

- 17% of respondents indicated they work in tourism-related jobs (accommodation, food, tourism services)
- Significant participation from respondents working in the healthcare sector (14%) and in public administration (11%)
- Many work in “other” jobs (48%)

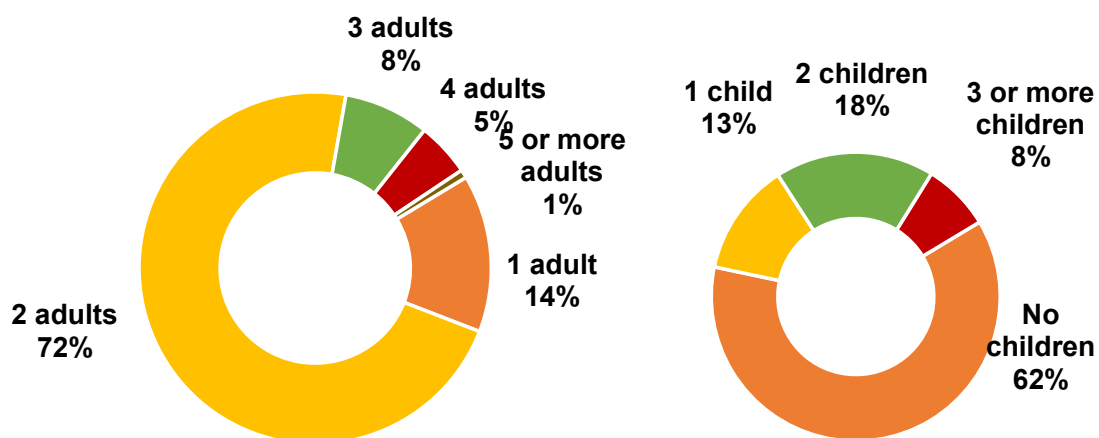
### Dependence of Livelihood on Tourism

- 15% indicated that their personal livelihood depended to a substantial extent on tourism
- 18% indicated that their family’s or friends’ livelihood depended substantially on tourism
- A majority of respondents perceives no livelihood dependence from tourism, personally (56%) and among family/friends (52%)
- Overall: Compared to previous years (2021, 2022), this sample of respondents has the lowest tourism dependence

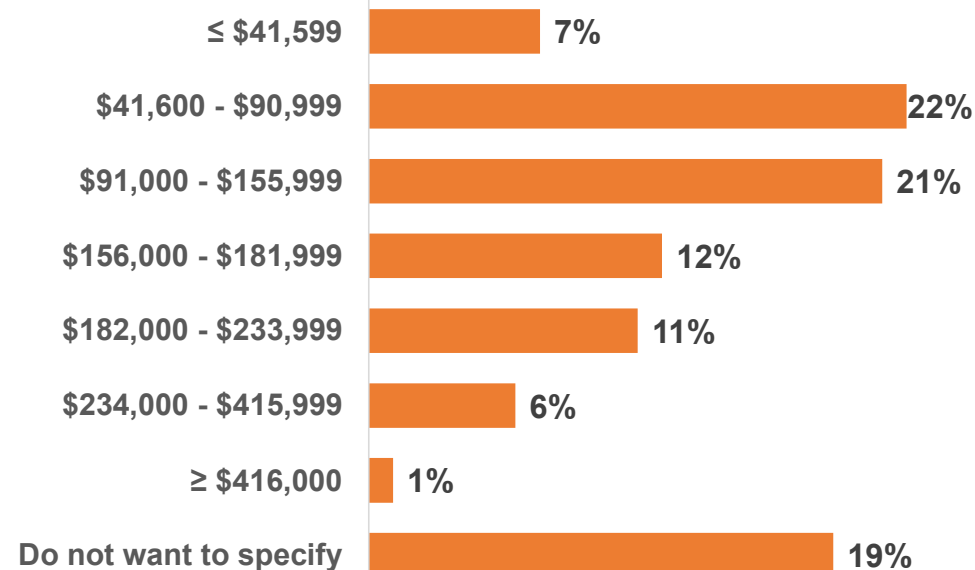
## Sample – Household type, household income

Figure 5. Distribution of respondents by household type and income (2023, n=786)

### Adults and children



### Household income



## Sample – Household type, household income

### Household Type

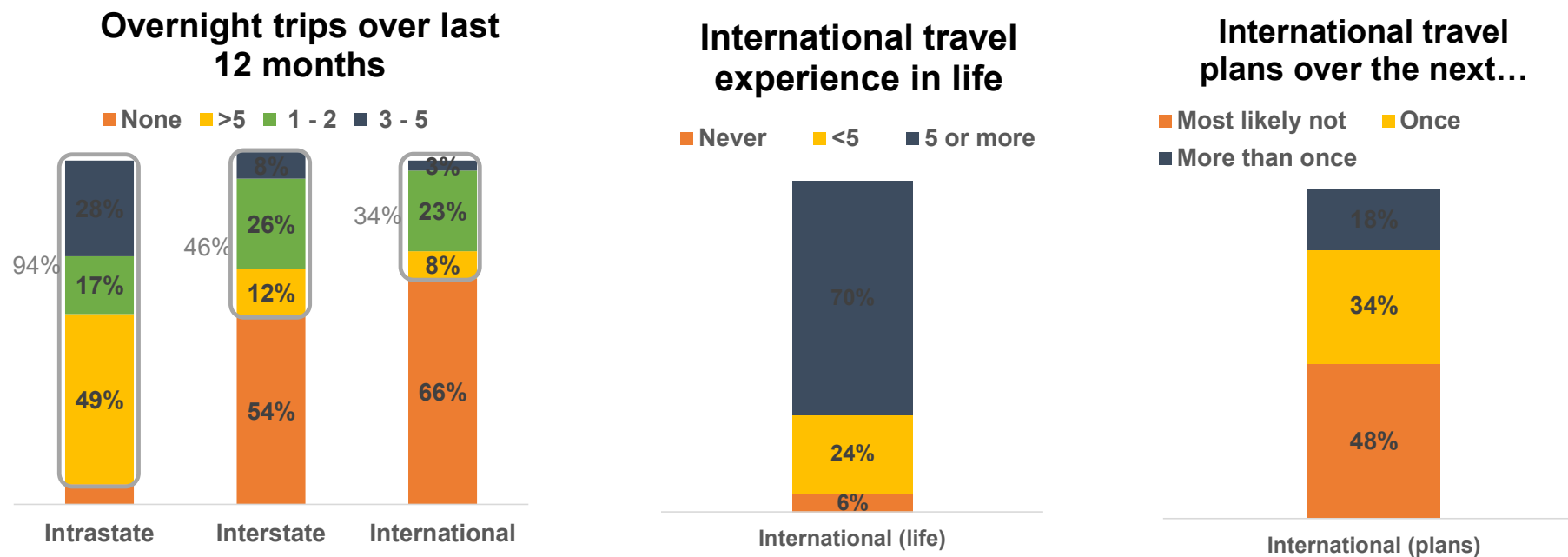
- Most respondents live in homes with two adults (72%)
- 14% lived in single-households
- Most respondents do not live with children (62%)
- Families with two children (18%) are slightly more common than single-child-families (13%)

### Household Income

- Most respondents indicated they have a household income between \$41,600 and \$155,999 (43%) or between \$156,000 and \$233,999 (23%).

## Sample – Travel experience and travel plans

Figure 6. Distribution of respondents by travel experience and travel plans (2023, n=786)



## Sample – Travel experience and travel plans

### Travel Experience

- The majority of respondents (94%) reported having travelled within Western Australia in the previous year for at least 1 overnight trip
- Almost half of the respondents (46%) reported having travelled within Australia
- 34% of respondents reported having travelled internationally in the previous year.
- 70% of respondents have travelled internationally 5 or more times in their life.

### International Travel Plans

- A majority of respondents (52%) intend to travel internationally at least once in the coming 12 months

## (b) Resident satisfaction: Suggestions from residents - details

The following pages provide details about the data analysis of resident survey's open-ended responses with suggestions.



## Suggestions from residents: Detail on each main topic

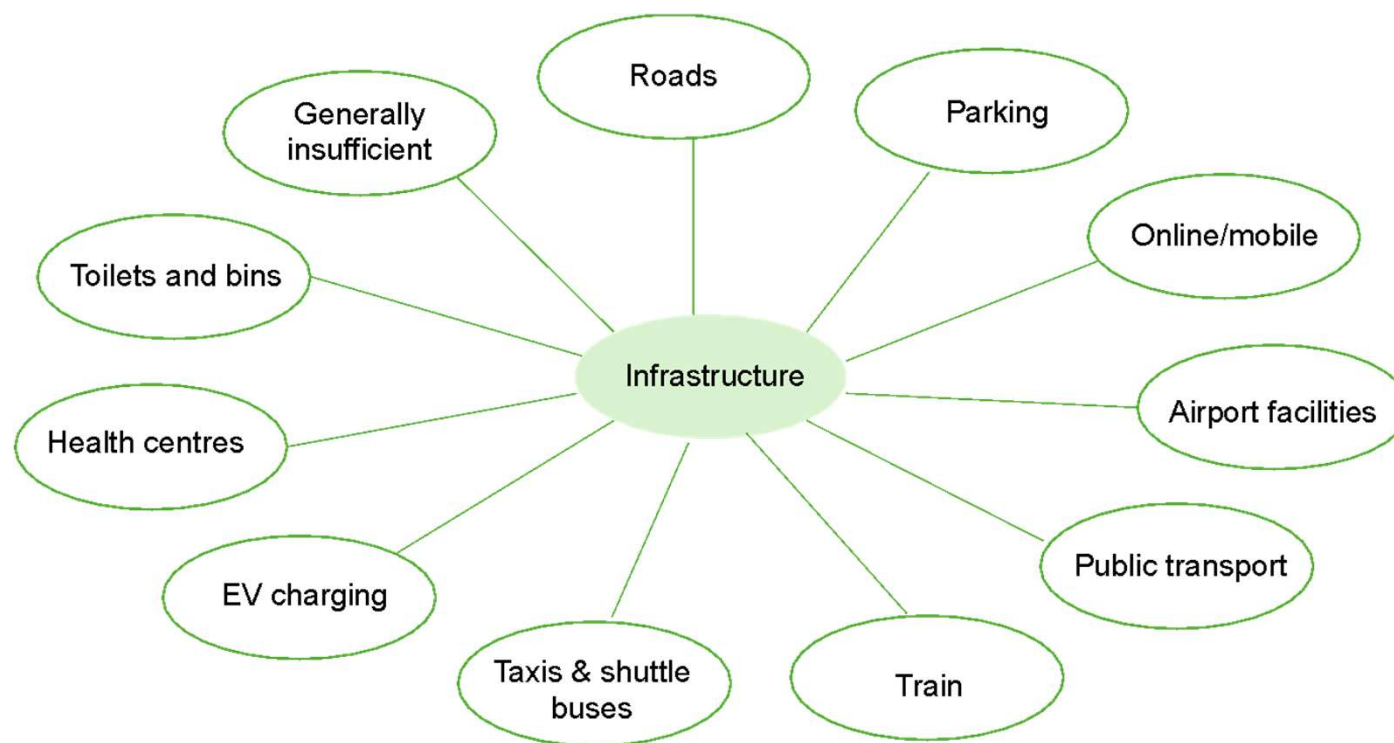
### Please note:

- Only a small selection of illustrative statement examples is provided in the following.
- Feedback varied depending on the specific locality, but statements are grouped together regardless of the reference location.
- Severity score is estimated based on overall sentiment in comments and the amount of comments on a particular topic.



## Suggestions from residents: Detail on each main topic - Infrastructure

Figure 12. Respondent suggestions regarding the improvement of infrastructure (2023)



## Suggestions from residents: Detail on each main topic - Infrastructure

### Infrastructure

#### Statement examples

“Train line from Perth to Busselton and Perth to Albany.”

“More availability and promotion of public toilets at tourist hot spots.”

“Put bins BACK in parking bays and high traffic areas, there wouldn't be so much litter on road sides and in waterways if people actually had somewhere to dump their rubbish.”

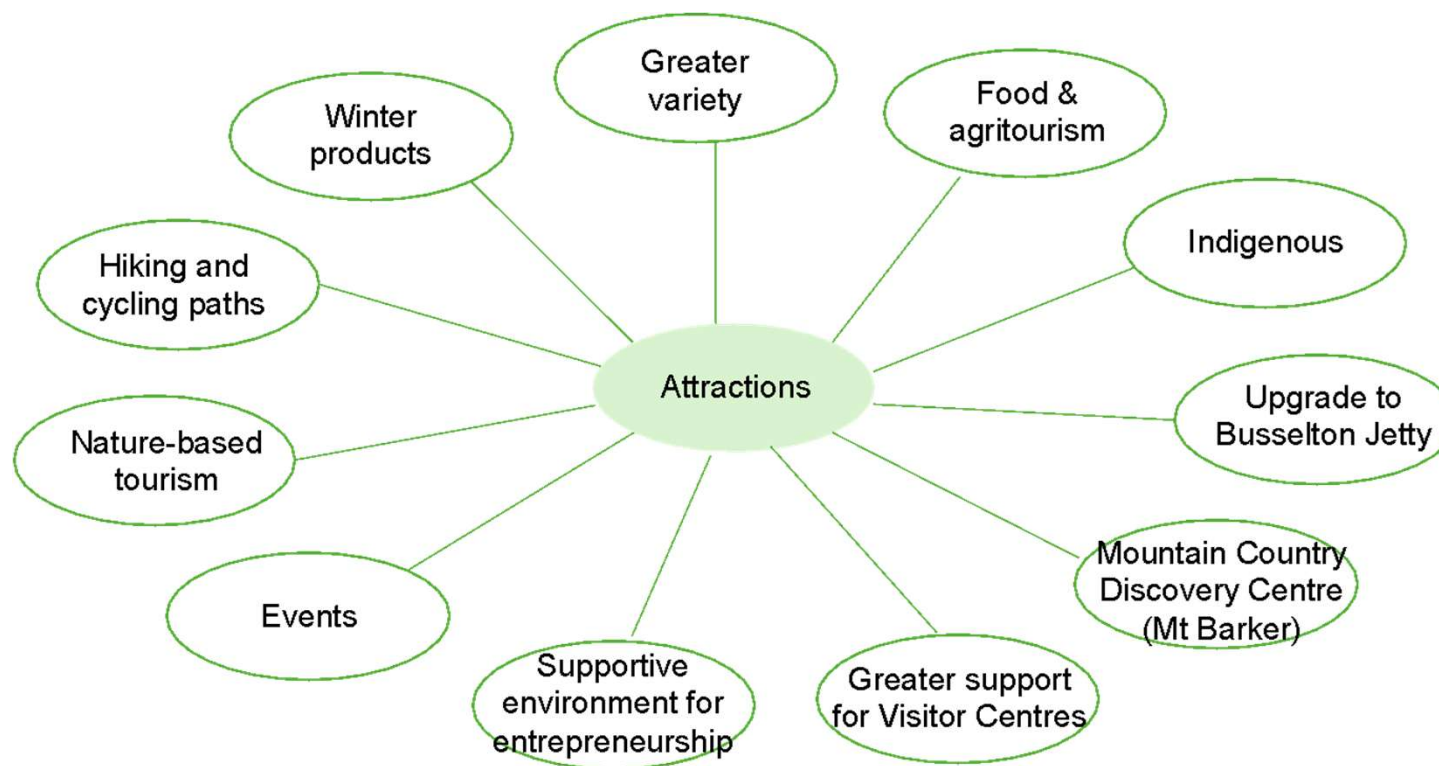
“Additional infrastructure to accommodate tourists alongside residents during the peak times is needed. Parking is especially needed within towns as well as popular attractions (almost every beach location).”

“Public transport development in all forms; transport from airport, more available taxis, local hire cars, bus services.”

“Improvements to infrastructure. The population nearly doubles in summer ... The internet buckles under the pressure, the roads become congested, parking in the CBD for workers becomes difficult. We encourage tourism as a Shire, but don't seem to have the facilities to cope.”

## Suggestions from residents: Detail on each main topic - Attractions

Figure 13. Respondent suggestions regarding attractions (2023)



## Suggestions from residents: Detail on each main topic - Attractions

### Attractions

#### Statement examples

“Support Southern Forest Food Council with promotion of food tourism, Agritourism and general focus on food towns in the Shire of Manjimup.”

“Approval of a greater variety of tourism venues would also be beneficial, especially if they can operate and attract tourists in the winter off season”

“Lost opportunity to build an absolute world class tourist facility at the end of the Busselton Jetty, when government funding failed to reach the required amount last year. Need to look at funding for this in the future, as existing underwater observatory has a limited lifespan left.”

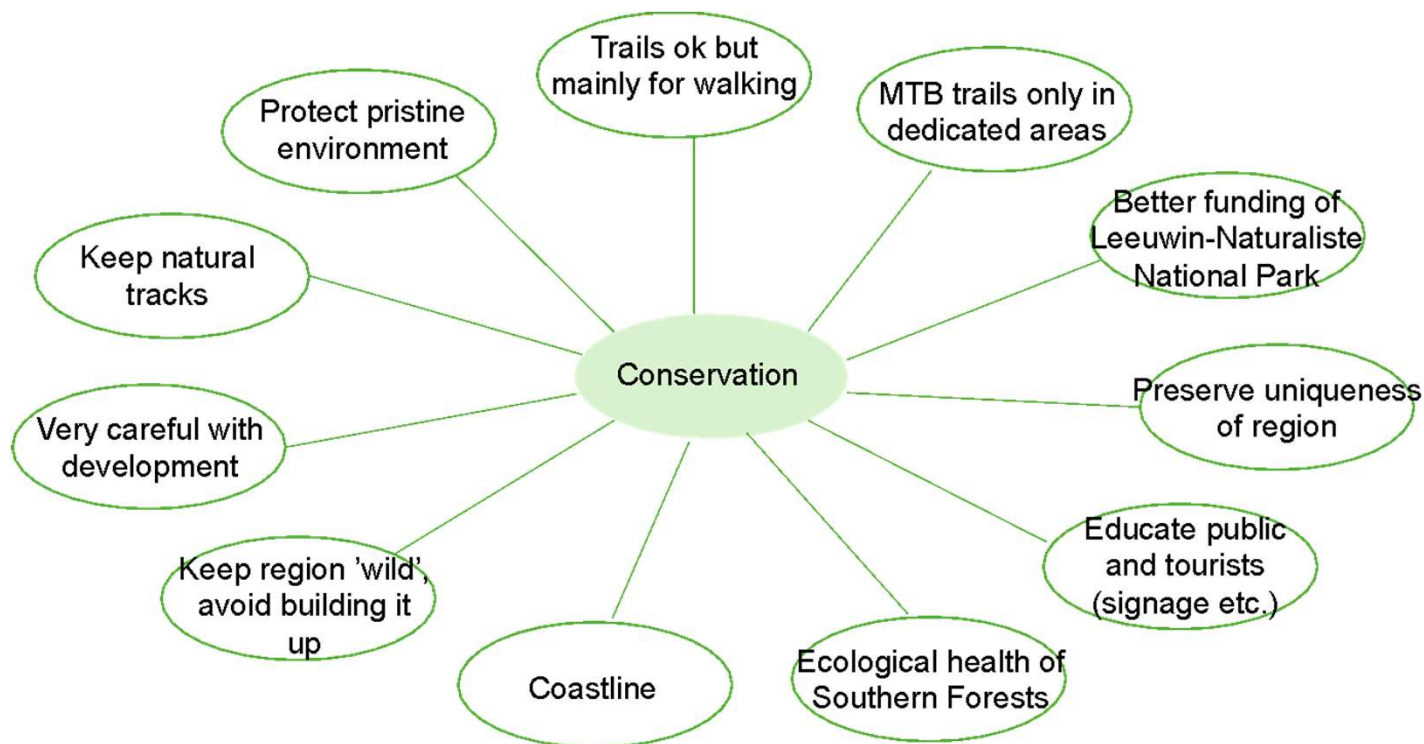
“Restaurants on beaches, boardwalks, cycle paths, walks”

“We need a Mountain Country Discovery Centre similar to the ANZAC Centre in Albany, atop Pwakkenbak (Mount Barker Hill) to inform tourists of the great history of the Porongurup and Stirling Range which is billions of years old. As well as the region’s pioneers and agricultural endeavors.”

“The Visitors Centre is the HUB for Tourists and need to be supported!!!!”

## Suggestions from residents: Detail on each main topic - Conservation

Figure 14. Respondent suggestions regarding conservation (2023)





## Suggestions from residents: Detail on each main topic - Conservation

### Conservation

#### Statement examples

“The main concern is protecting our pristine environment. This is already a great attraction for many visitors and will only increase as other areas become more polluted or affected by climate change.”

“Expanding the trails networks but still keeping National Parks as protected areas, predominantly for walking. Mountain biking can be detrimental to the environment, so should be developed in areas where the impact would be less damaging.”

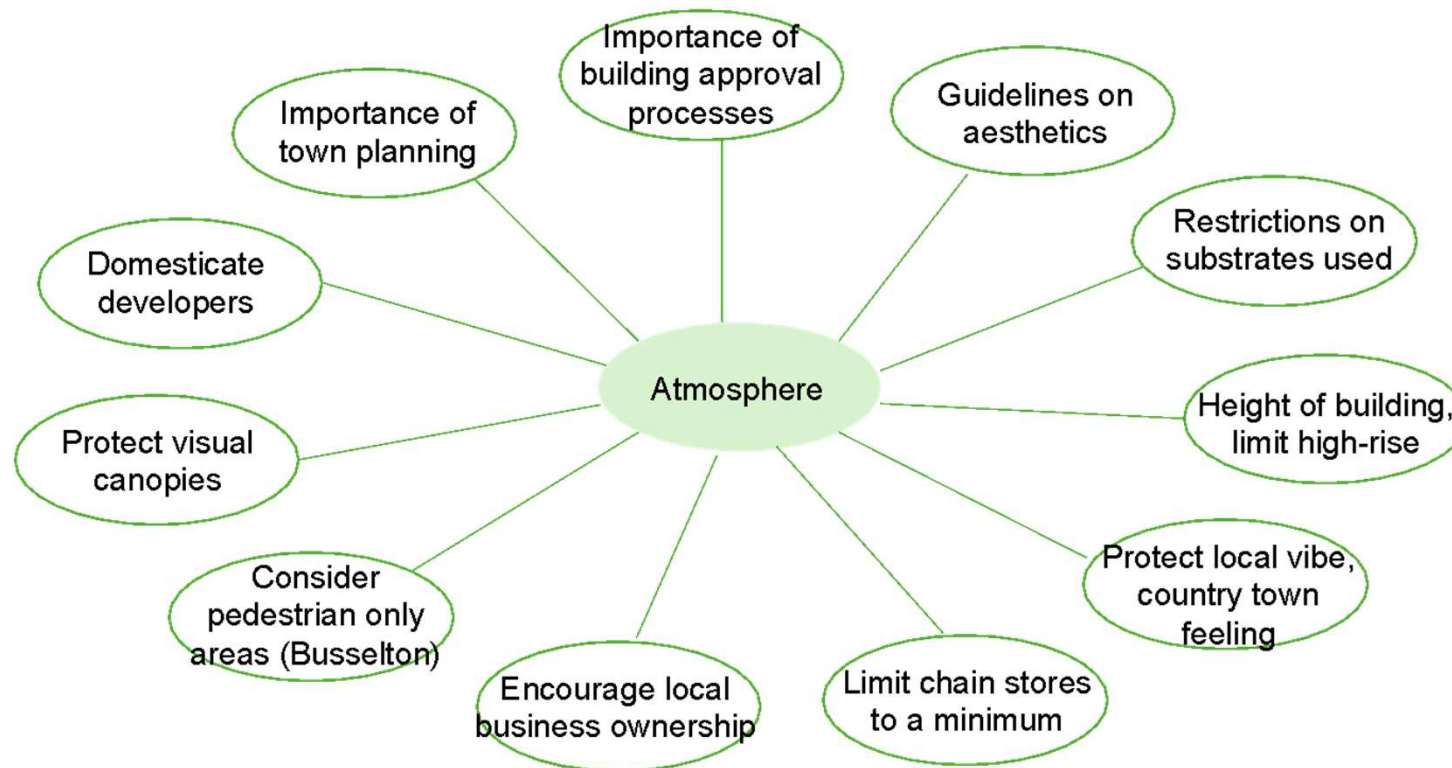
“This makes the region unique that we don’t have built up coastal resorts this is what I hear tourists love about WA being wild.”

“Also to stop the rampant development so we lose the feel of the area which attracts tourists to the region. Developments need to be designed to incorporate existing bush and trees. ... If we do not carefully manage the development of the area, we will lose the essence of what makes it such a great tourist attraction.”

“Far more investment in DBCA to capture and educate on local history, biodiversity and environmental change. ... Signage is outdated or non-existent. More interpretative information is needed and far more opportunities for the general public to interact and learn about this vitally important biodiversity hotspot. How do they know to look after it, if we aren't educating them on it?”

## Suggestions from residents: Detail on each main topic - Atmosphere

Figure 15. Respondent suggestions regarding atmosphere (2023)



## Suggestions from residents: Detail on each main topic - Atmosphere

### Atmosphere

#### Statement examples

“Building planning and approval processes especially within towns should have restrictions on substrates used and promotion of overall aesthetics that compliment small towns. If we continue to turn these small country towns into whatever developers want to make money from, the towns will lose the attraction for tourism. ie no-one visits Margaret River to see another Joondalup.”

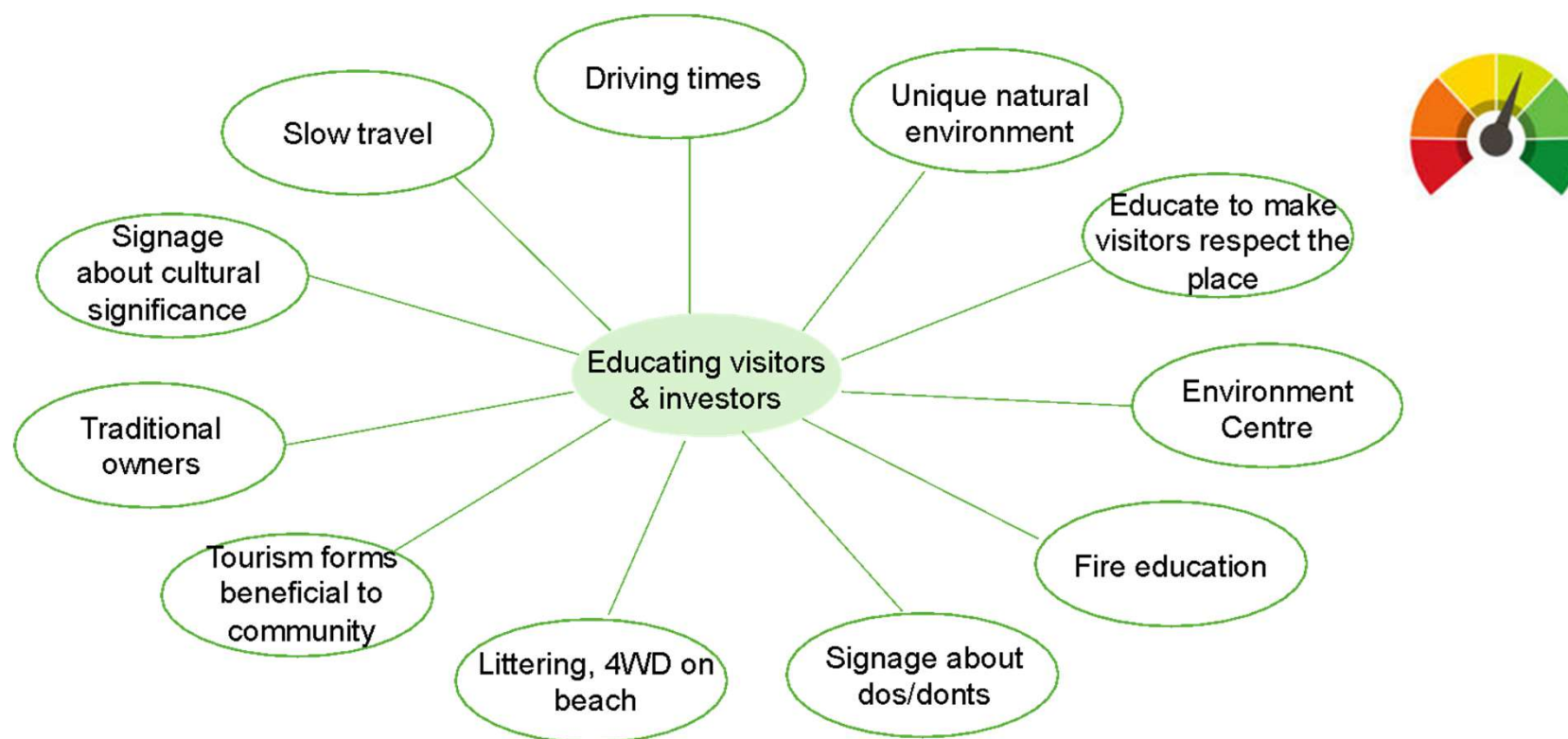
“There needs to be a greater focus on supporting those areas in town where retail is family owned and operated. ... Residents have been saying for years that Prince Street needs the attention of Council in its future development plans. It is a one-way street perfect for closure to traffic and the creation of a pedestrian only and pedestrian safe shopping area. .. Neither Tourists nor Residents like the new shopping center where franchises have been installed. Tourists come to get away from franchised retailing.”

“It is vital that Dunsborough and other small country towns retain the 'small country town' feel - ie: no high rise buildings, no chain stores (like McDonalds). Tourists come to our region because it is unique, individual and not built up. This needs to be retained, valued and respected. Any development needs to be kept to low rise buildings and big chain stores need to be kept to a minimum. Small business owners need to be encouraged.”

“If [infrastructure] issues can be addressed without impacting on the appeal of these areas such as keeping all buildings below 3 storeys then the greater community would probably be more welcoming as it would reduce frustration.”

## Suggestions from residents: Detail on each main topic - Education

Figure 16. Respondent suggestions regarding educating visitors & investors (2023)



## Suggestions from residents: Detail on each main topic - Education

Educating visitors  
& investors

### Statement examples

“Educating visitors that that the south coast and forest areas need time to visit . . . . Educating overseas visitors to the length of drives between attractions. For example, it is not pleasant or sensible to drive from Perth to Albany and onto Margaret River in one day. (it happens)”

“More education for tourists to explain our uniqueness when it comes to Fauna and Flora and to respect our Wildlife.”

“More education like an environment centre about the biodiversity etc.”

“Reciprocatative visitation. Tourists must do something to improve the environment and the places. They can keep their money and stay at home, if they are not respectful of the place they visit and do not harm it. Where we live is not a playground for irresponsible idiots. Education so that they understand that tourism, otherwise, is a destructive, exploitive, and extractive industry.”

“Signage about cultural significance.”

“More clear signage as to what is and isn’t allowed in each area.”

## Suggestions from residents: Detail on each main topic - Community

Figure 17. Respondent suggestions regarding community & indigenous (2023)





## Suggestions from residents: Detail on each main topic - Community

Community &  
Indigenous

### Statement examples

“When we think about tourism, we need to find the balance between the needs of the visitor and the needs of the community. Sometimes these are the same, and sometimes there is a chasm between them. The secret to success is not to over-commercialise the region and to promote to like minded visitors from destinations that care for their own environments. Critical areas for development are high end accommodation and experiences.”

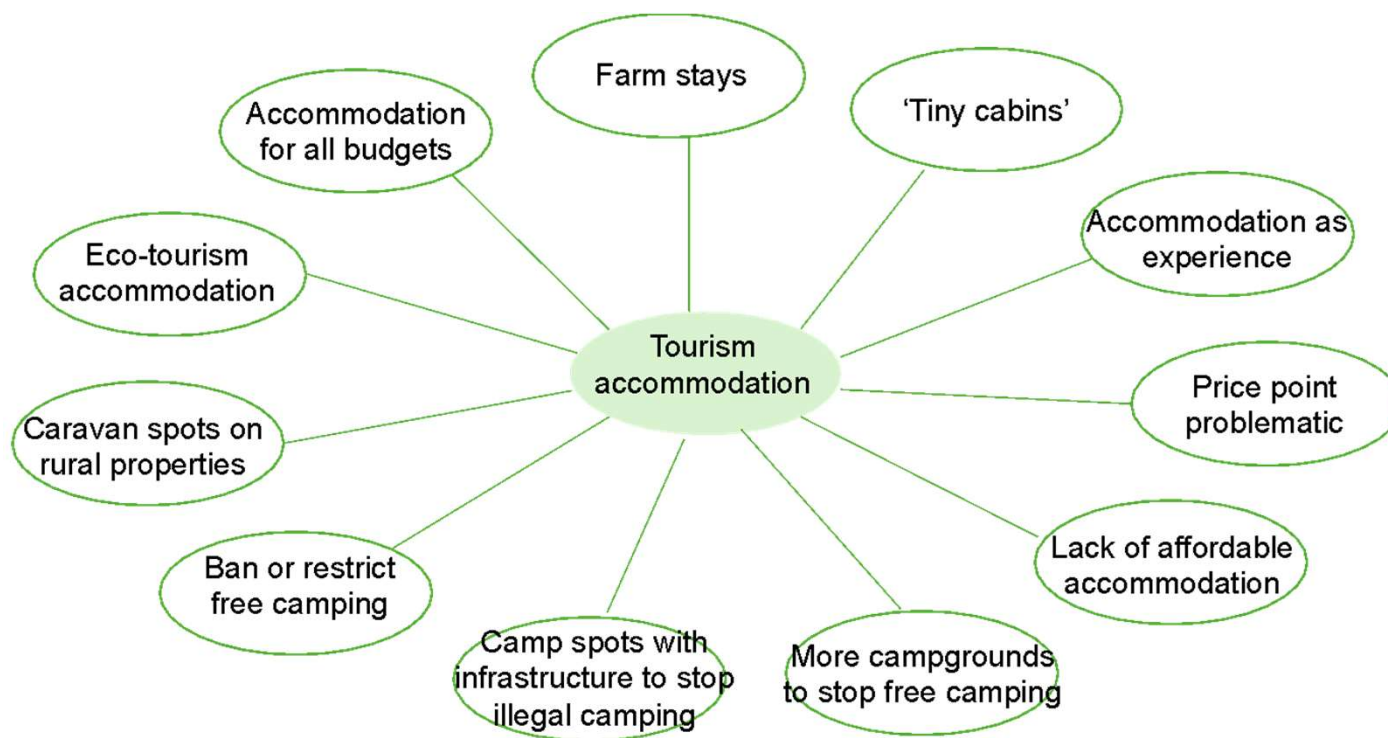
“Speaking to Wadandi Elders about how to approach tourism in a way that is sustainable for their culture, respectful of the land and significant sights, and educating tourists about such a rich interesting and wise culture.”

“Preservation of sense of community.”

“I truly believe that what attracts tourists (and indeed most of the people who now live in this region) is the unaffected natural beauty and the ease of lifestyle in the southwest. Over-development in the region both for tourism and "residential" (ie those who want to own a holiday home and only use it for 1-2 months/year) is increasing at such a rate it is destined to compromise the things we hold dear about the region. Having more stringent controls over development - and with meaningful consultation (rather than just paying lip service) with the local community is critical for the future of both the local lifestyle as well as the tourism industry.”

## Suggestions from residents: Detail on each main topic- Accommodation

Figure 18. Respondent suggestions regarding tourism accommodation (2023)



## Suggestions from residents: Detail on each main topic- Accommodation

Tourism  
accommodation

### Statement examples

“Invest in other forms of accommodation - farm stays, tiny cabins. Tourists are looking for experiences rather than a place to stay.”

“Accommodation that suits all budgets.”

“Accommodation is a massive issue - you can get the tourists here but there's limited places for them to stay.”

“Free camping on road reserves, in state and national parks and in carparks needs to be banned.”

“Free overnight or 3 day camp spots with infrastructure to reduce illegal camping and damaging bush areas littering etc.”

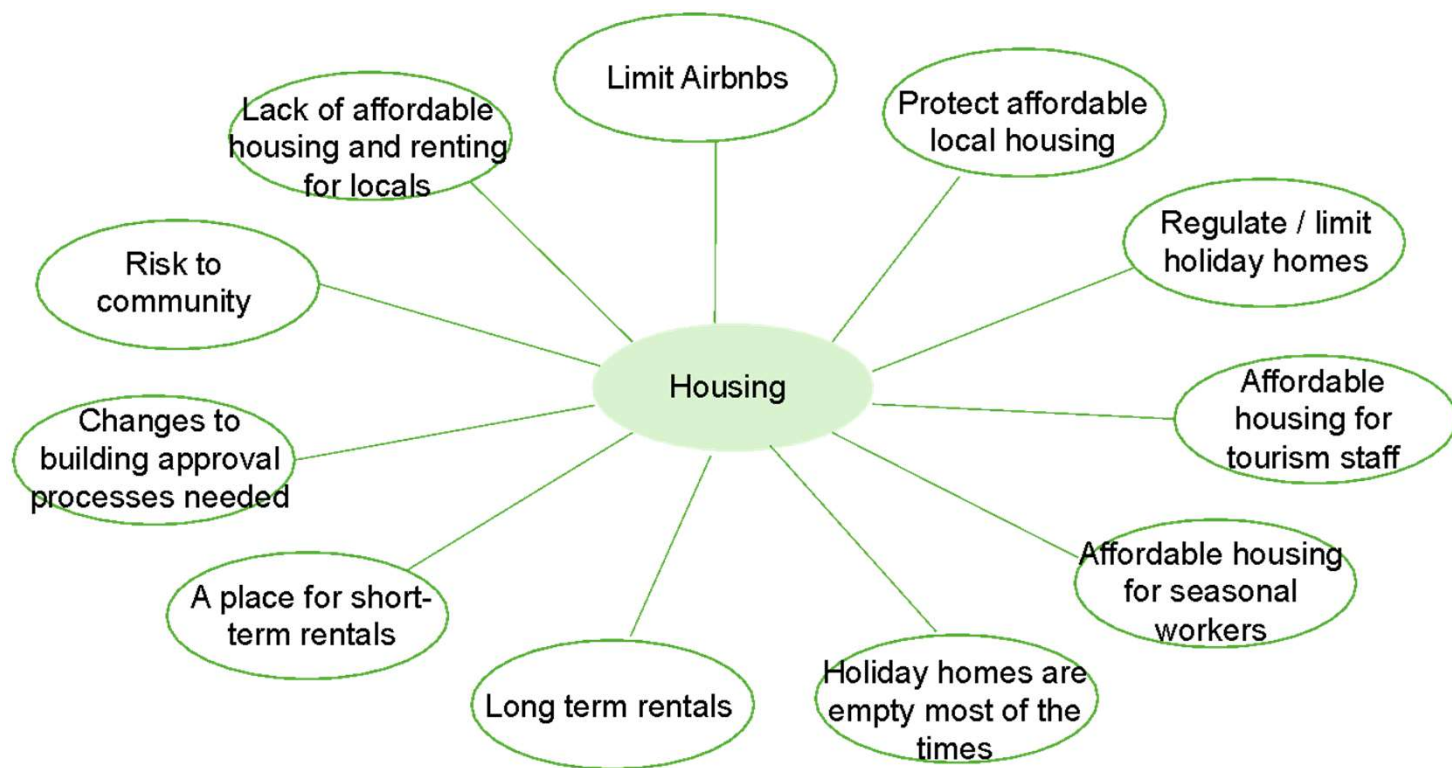
“Improving access to cheap accommodation ie. campgrounds to stop people free camping.”

“Sustainable responsible accommodation options. Support small local businesses.”

“Accommodation is overpriced. Affordable accommodation would attract more people who don't have a holiday home or can't afford paying inflated prices.”

## Suggestions from residents: Detail on each main topic - Housing

Figure 19. Respondent suggestions regarding housing (2023)



## Suggestions from residents: Detail on each main topic - Housing

### Housing

#### Statement examples

“The housing crisis needs to take priority. There are too many short term rentals, making it impossible to find accommodation for those on low incomes. Our hospitality and retail workers are being priced out of the market due to soaring rents and house prices across the South West. More tourists will add to this problem as short stay rentals lead to further shortages in long term rental accommodation.”

“Housing is a huge issue, there is a complete lack of affordable long term housing for locals. Rent is through the roof, the average annual salary in our Shire is one of the lowest in WA and yet we are paying some of the highest rents. ... But also the number of new people moving to the region, because they have previously been a tourist and now want to live here, seems to have increased to an unsustainable level. Cap the number of people moving here for a while, while increasing affordable housing options.”

“Housing for staff. Houses sit empty for the majority of the year and are air bnb rented for the busy season. It would be better for the community if there was affordable accommodation for seasonal workers and long term rental housing.”

“Regulations for holiday accommodation/airbnb to ensure housing is available for local residents.”

“Provide affordable accommodation for locals and workers. Limit Air BNB.”

“Housing, housing & more housing so the staff required have somewhere to live instead of in their car. It’s an absolute joke.”

## Suggestions from residents: Detail on each main topic - Staff

Figure 20. Respondent suggestions regarding staff (2023)





## Suggestions from residents: Detail on each main topic - Staff

Staff

### Statement examples

“Sustainable local jobs need to be a priority.”

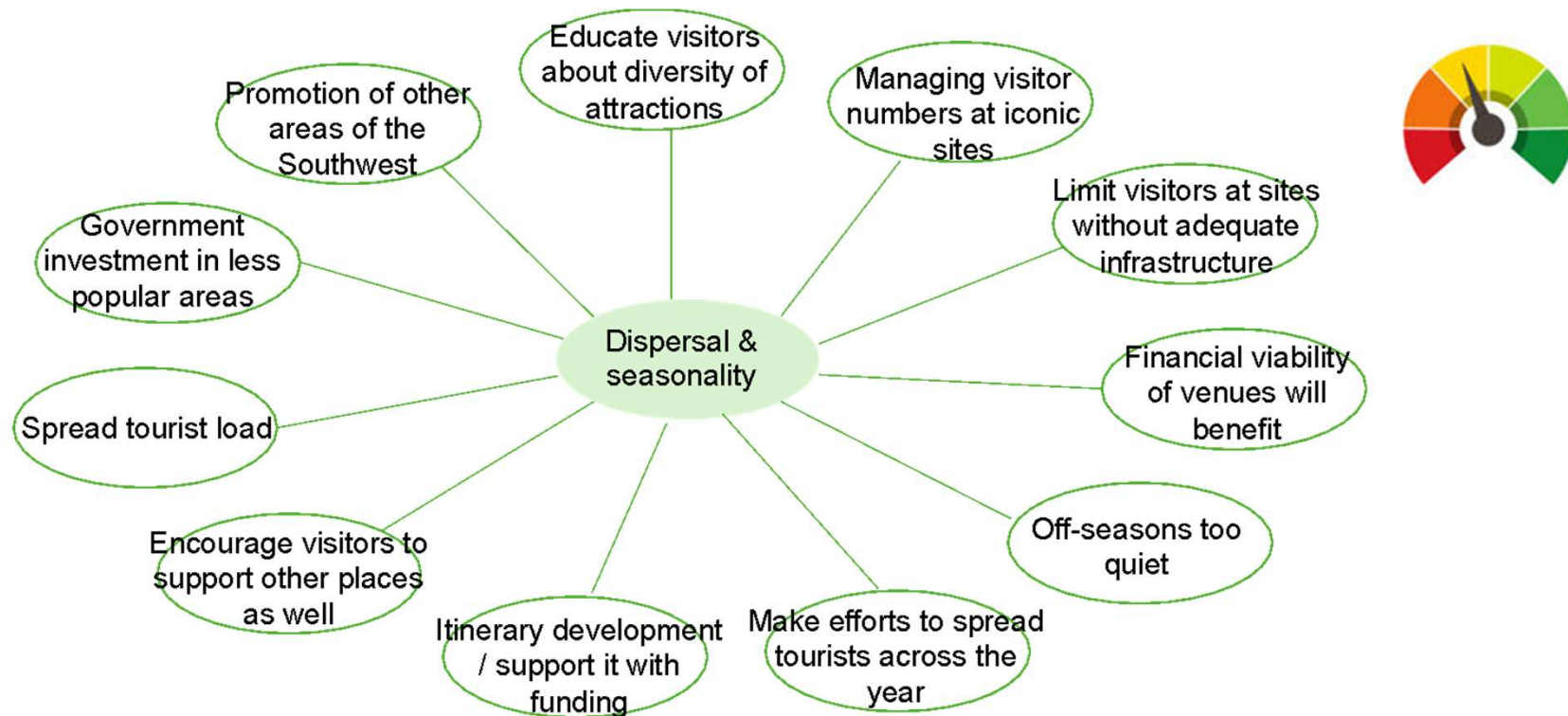
“I think more conversations also need to be held about funding small local grassroots organisations,. The amount of volunteer hours put in at visitors centres, local museums, art galleries, major events etc is ridiculous. The State Government (and perhaps even federal) need to look at where the money is going and how it is spent. Very often, there are substantial grants for major events, and while the organisers (who are often commercial entities) make wages and profits, it's off the back of volunteers.”

“Keeping housing affordable for those working in tourism and boosting wages to keep up with inflation.”

“Tour guide training is essential and needs to be affordable, any staff that interacts with tourists should be trained, not just guides, but cellardoor, restaurant, drivers, taxis etc It will help to maintain a consistent message, that we are all singing from same sheet, conveying the key messages.”

## Suggestions from residents: Detail on each main topic - Dispersal

Figure 21. Respondent suggestions regarding dispersal & seasonality (2023)



## Suggestions from residents: Detail on each main topic - Dispersal

### Dispersal & Seasonality

#### Statement examples

“Educating visitors ... that Margaret River area is not the only attraction within the area.”

“Promotion of areas of the South West outside of current favourites.”

“Spreading tourism throughout the year rather than concentrating in peak times, through diverse events and visitor experiences.”

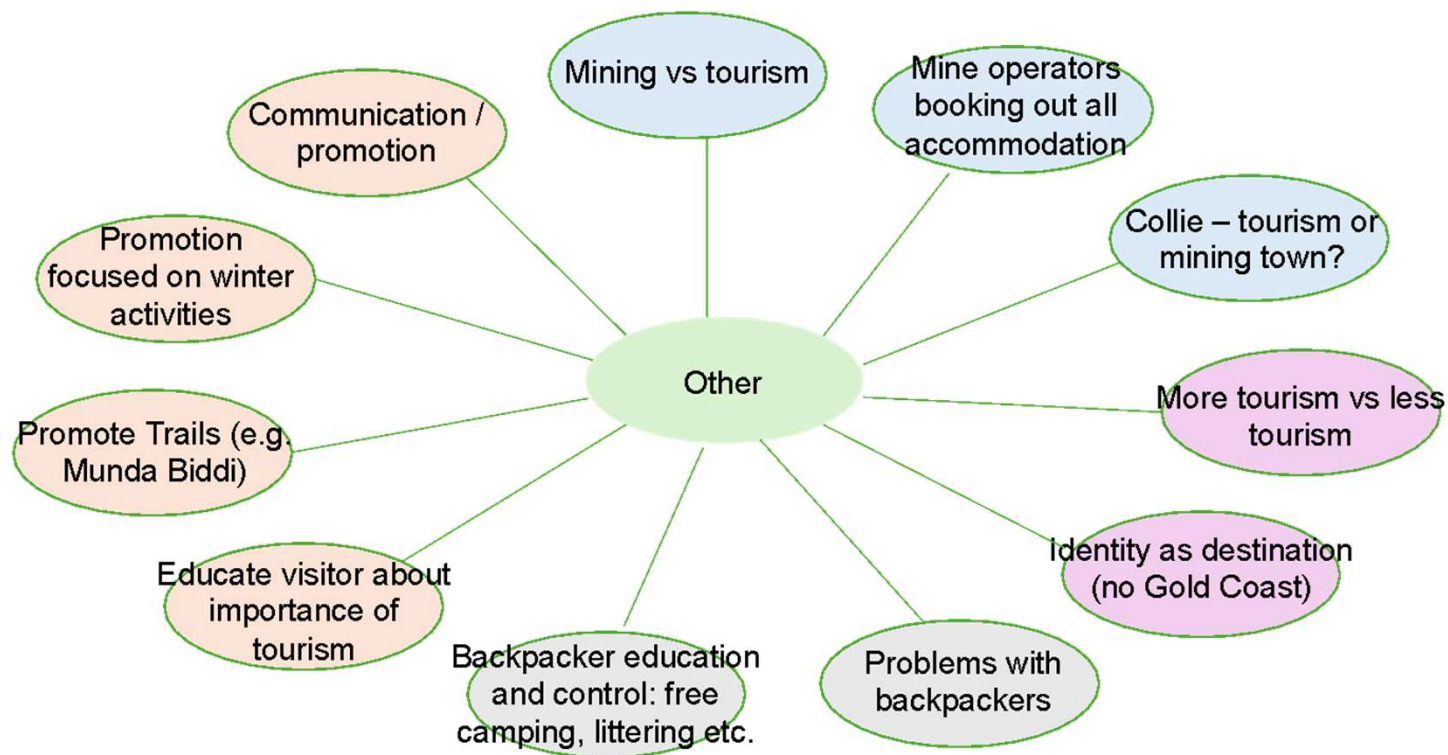
“Winter, non-school holiday periods are very quiet in my area of residence. More tourists in the off peak periods would benefit local businesses that struggle during those times.”

“Managing the visitor numbers to iconic sites like Bluff Knoll needs to be controlled. This will ensure protection of the environment and the safety of those visiting.”

“Government investment in Tourism in the less popular tourist areas of the SW to spread the tourist load so rural communities see more benefit. Clearly tourists will always want to visit Margaret River, Busselton and Albany to name but a few, but they should be encouraged to support other tourist attractions.”

## Suggestions from residents: Detail on each main topic - Other

Figure 22. Respondent suggestions regarding other topics (2023)



## Suggestions from residents: Detail on each main topic - Other

Other

### Statement examples

“More attractions for travellers and accommodation that is not already fully booked with Greenbushes mine workers.”

“Collie deciding if it wants to be a tourism or mining town.”

“We need more Tourists which will lead to more Jobs for the future, as our small towns need more people!”

“There are already too many tourists and its going to turn our area into Goldcoast which is not why people come here. Why come away from the city to go to another city?”

“More promotion of activities within the region across the winter months to ensure stability for tourism venues is required.”

“Resident attitude to tourism: Important that people living here understand that development and provision of livelihood, outstanding facilities, infrastructure & QOL that residents enjoy is a direct product of tourism. Assist in communication of above and work to dispel resident us/them mentality.”

## Suggestions from residents: Detail on each main topic - Other

Other

### Statement examples (continued)

“We encourage backpackers to visit Australia with a work visa that enables one year to be used travelling the country after a certain amount of work. These visitors have become a scourge. They hold Bush doofs in pristine areas damaging the most beautiful environments with rubbish and toilet waste. This doesn't count the constant problems with fires, drugs ( making, selling and using) and behaviour. ... Australian back packers are part of the problem too. They do not want to pay for any accommodation but they want to camp with cheap facilities. They are aggressive and abusive towards rangers. They do not use the caravan parks or they are out priced by the daily cost. . The travellers feel entitled to travel to these places without any responsibilities to care for the region or the people who live here. I would like back packer visas to be removed when they are involved with activities that are criminal. So many tourists do the right thing but this cohort of Aussies and backpackers are a problem.”



## (c) Water consumption: Water accounts

The following page provides details about the water accounts per location and land use in the water consumption analysis based on Water Corporation (2025).

## Water consumption

The analysis of Water Corporation (2025) data is based on the number of accounts in the table below. The analysis only includes land uses properties with their own water use account. It doesn't include the café's, restaurants and bars in main streets, commercial/tourist developments and shopping centres, who don't have a separate water meter. These land uses will therefore be underrepresented in the analysis.

Additionally, land use and town codes have been combined for small groups as follows:

- Margaret River includes Augusta, Gnarabup, Prevelly and Cowaramup.
- Albany includes Emu Point, Kalgan, Lower King.
- Dunsborough includes Yallingup.
- Restaurants include cafés, fast food outlets and taverns.
- Hotels include motels and guest houses.
- Caravan parks include camping grounds.

Accounts with incomplete data have been excluded.

### Accounts per location and land use

	Albany	Dunsborough	Margaret River	Total
Caravan Parks	9	3	5	17
Holiday units	49	56	11	116
Restaurants	18	3	11	32
Hotels	18	1	15	34
<b>Total</b>	<b>94</b>	<b>63</b>	<b>42</b>	<b>199</b>

# Annual Progress Report 2023-2024 Australia's South West Sustainable Tourism Observatory

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Perth, May 2025*