BRIGHTHOUSE

Boddington Caravan Park Needs Analysis

Prepared for the Shire of Boddington

October 2022

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GOVERNMENT OF WESTERN AUSTRALIA

PEEL Development Commission

Shire of BODDINGTON Flowing with Natural Beauty

Contents

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Document Information

Document Id	Boddington Caravan Park Needs Analysis and Business Case
Document Owner	**Brighthouse**
Issue Date	**31/10/2022**
Last Saved Date	**31/10/2022**
File Name	**Boddington Caravan Park Needs Analysis and Business Case**
Record of issue	**Issue v1.1 issued 31 October 2022**

Client

Shire of BODDINGTON
Flowing with Natural Beauty

PEEL Development Commission

This study has been made possible with funding from the State Government

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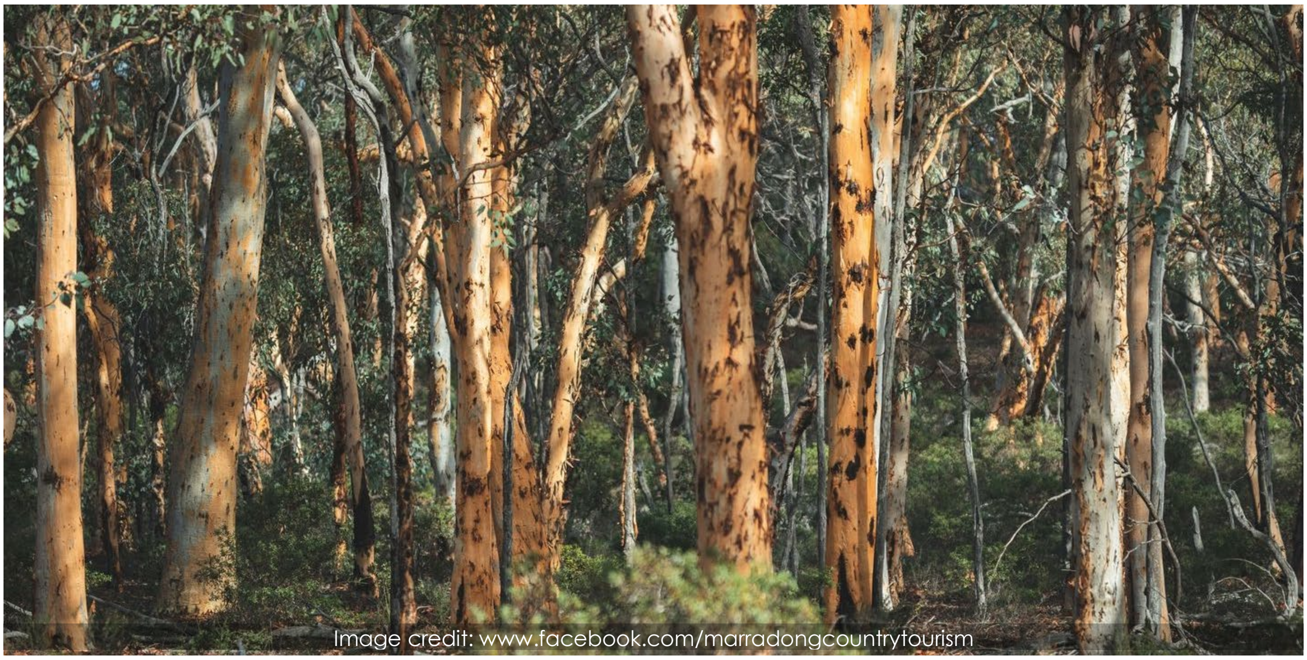


Image credit: www.facebook.com/marradongcountrytourism

Executive Summary

The key objective of this report is to provide a demand profile for tourist accommodation in the Shire of Boddington local government area (LGA), to help inform the Shire on the adequacy of supply of tourist accommodation relative to current and future demand.

It aims to:

- Review the current supply of tourist accommodation within the Shire.
- Analyse the suitability of the current supply of caravan and camping sites and short-term overflow facilities;
- Consider expansion and improvement opportunities for the shire-operated caravan park
- Investigate tourist visitation and other relevant tourism indicators for the Boddington Shire;
- Engage with key stakeholders, including commercial accommodation providers in the Shire, the major employers located in the shire, including Newmont Boddington Gold Mine and South 32 Worsley Alumina Mine;
- Identify of key stakeholder issues and opportunities associated with the improvement and diversity of supply of commercial accommodation;
- Examine if there the supply constraints existing in the provision of commercial accommodation in Boddington.
- Determine if there is a need for a greater diversity of accommodation in the shire and if the existing supply is adequate for future growth;
- Research and analyse tourist accommodation trends and best practice; and
- Provide appropriate options and potential development opportunities for the development of additional tourist accommodation, to meet current and future market needs.

The development of appropriate tourist accommodation in the Boddington LGA is essential, both for the sustainability of its tourism economy and the creation of employment, but also to provide access for tourists to the unique natural, cultural, and historic attractions of the area. The aim is to address the imbalance between the slow evolution of the area as a short-stay tourism destination and the tourist demand for alternative inland tourist locations such as Dwellingup and Collie.

Findings

The narrative of the report describes the following findings in detail.

- Despite some minor crossover, the product and market for short-stay accommodation in Boddington is split between operators who target worker and contractor guests, and operators that target holiday travellers.
- Research and consultation indicate a gap in supply of affordable, separated, holiday accommodation for individuals, couples and families;
- The mast appropriate location for the holiday accommodation is on Lot 18A, adjacent to the existing caravan park;
- Issues regarding the installation of tourist accommodation on flood-prone land can be relatively easily mitigated without costly filling of the land;
- Pricing of caravan and camping sites at the Boddington Caravan Park is lower than for comparable locations and is like so low as to be unviable, if all normal operating costs were identified and included in the operating expenses;
- The excellent events staged throughout the year in Boddington lack enough frequency to maintain a constant flow of tourists to the town;
- The town lacks iconic attractions that identify it as a tourist destination;
- The superb attractions of the Hotham River, foreshore development and the many other historic and natural attractions available to visitors to the town, do not engender frequency of repeat visitation, with perhaps the exception of the Hotham Park adventure playground and skate park;
- Boddington lacks tourism presence, developed through marketing and promotion, compared with its peers like Dwellingup and Collie;
- The provision of free-camping sites on the Hotham River foreshore is detrimental to the operation of the caravan park and the financial return to the community; and

- There is no fit-for-purpose backpacker accommodation facility in Boddington.

Recommendations

The rationale behind the following recommendations is contained in the report narrative.

- Increase the supply of tourist accommodation in Boddington by
  a) Constructing several separate holiday accommodation units on the vacant site adjacent to the existing caravan park; and
  b) Encourage other tourist accommodation providers where appropriate, to add the supply of holiday accommodation, through supporting applications for the developments and grant funding applications.
- Initiate a concept design for the caravan park accommodation and develop a business case to support an application for grant funding by the shire for the construction of the units;
- Review current pricing policy for the caravan park with a view to increasing tariffs to market rates to provide a better financial return to the Shire, which could be partially utilised for marketing and promotion of the town's tourist offer;
- Close the free-camping area;
- Investigate the option of constructing a small backpacker lodge (4 – 6 rooms), in a purpose-designed single transportable unit with shower and toilet facilities on the land currently utilised for free-camping; Explore the level of support for, and the potential for success of an application for grant-funding to develop one or more iconic tourist attractions that would encourage regular repeat visitation to the town. The suggestions for the attractions put forward are a 4WD Adventure Park and a gold mining exhibition centre; and
- Instigate a marketing plan utilising social media and online promotion (tourism website) and investigate a software as a service (SAAS) solution to online booking of all the town's tourist accommodation

Next Steps

Establish a small project group consisting of Shire executive and an appointed expert consultant to:

a) Examine the viability of constructing tourist accommodation at the Lot 18A site and at the free-camping area, with a concept design and business case; and
b) Design a tourism and marketing and promotion plan and establish a budget for its implementation;
c) Work with the Peel Development Commission, Tourism WA and the mining industry to ascertain the level of support for the development of new, iconic tourism attractions in the Boddington LGA.

Project Overview

Through the adoption of the Council Plan 2022-2032, Council resolved to progress a business plan to determine the need and viability for the upgrading of the Boddington Caravan Park. The project will involve two stages, being an accommodation needs analysis, followed by a business case to ensure that an evidence-based approach is implemented. This report covers the Project Stage One - Needs Analysis only.

The Needs Analysis (Stage 1) incorporates:

- Accommodation demand/supply analysis
- Consideration of the current and potential product mix to meet demand and ensure financial viability and a positive user experience
- Review and assessment of existing caravan park, noting any redevelopment requirements to ensure flexibility to "future proof" the development
- Assess current management arrangements and provide alternative management options where appropriate
- Determine opportunity for future staging of construction and development
- Provide concepts for minimising construction and servicing costs

- Consider potential to incorporate alternative uses for sites in the caravan park
- Liaison with relevant industry stakeholders

The Business Case (Stage 2) incorporates:

- Caravan industry research, best case examples, locational advantages and potential issues
- Short and long-term market impacts of COVID-19 pandemic
- Current market trends and market projections
- Broad capital cost estimate of potential redevelopment – including construction and site services
- Financial modelling including projected occupancy and yield
- Estimated operational costs
- Product mix variability outcomes
- Cost benefit analysis
- High-level social and economic impact analysis

This report responds to the Shire of Boddington request detailed above in the form outlined in the Executive Summary aims.

Image credit: www.facebook.com/marradongcountrytourism

The Situation and Background

Tourism and hospitality make a huge contribution to Western Australia's economy, and both the state government and local governments have an important role to play in the regulation, development, marketing, and growth of these sectors.

Boddington Tourist Visitation Overview

In the 2021 census, the population of Boddington was recorded as 1,707 persons with slightly more males (52.8%) than females (48.2%). The median age is 42 which is slightly older than the state and national average of 38. The median household income is $1,760 which is slightly below the state average of $1,815 and above the national average of $1,746.[1]

People	Boddington	%Boddington	Western Australia	%Western Australia	Australia	%Australia
Population - Male	885	51.8	1,322,855	49.7	12,545,154	49.3
Population - Female	822	48.2	1,337,171	50.3	12,877,635	50.7
Indigenous status - All people						
Aboriginal/Torres Strait Is.	60	3.5	88,693	3.3	812,728	3.2
Non-Indigenous	1,491	87.4	2,431,204	91.4	23,375,949	91.9
Indigenous status not stated	153	9.0	140,128	5.3	1,234,112	4.9
Age - All people						
Median age	42	N/A	38	N/A	38	N/A
Median weekly incomes (a) People aged 15 years and over						
Personal (b)	$834	N/A	$848	N/A	$805	N/A
Family (c)	$2,131	N/A	$2,214	N/A	$2,120	N/A
Household (d)	$1,760	N/A	$1,815	N/A	$1,746	N/A

Industry of employment was not yet released for 2021 census data at the time of publication of this report, though the 2016 census reported the following top industries for employed people aged 15 years and over:[2]

Industry of employment	Boddington	%Boddington	Western Australia	%Western Australia	Australia	%Australia
Gold Ore Mining	161	33.8	12,768	1.1	20,141	0.2
Bauxite Mining	41	8.6	1,808	0.2	3,347	0.0
Local Government Administration	19	4.0	16,526	1.4	142,724	1.3
Secondary Education	19	4.0	20,488	1.8	177,487	1.7
Hospitals (except Psychiatric Hospitals)	15	3.2	41,706	3.6	411,808	3.9

Of the employed people in Boddington, the most common responses for industry of employment included Gold Ore Mining 33.8%, Bauxite Mining 8.6%, Local Government Administration 4.0%, Secondary Education 4.0% and Hospitals (except Psychiatric Hospitals) 3.2%.

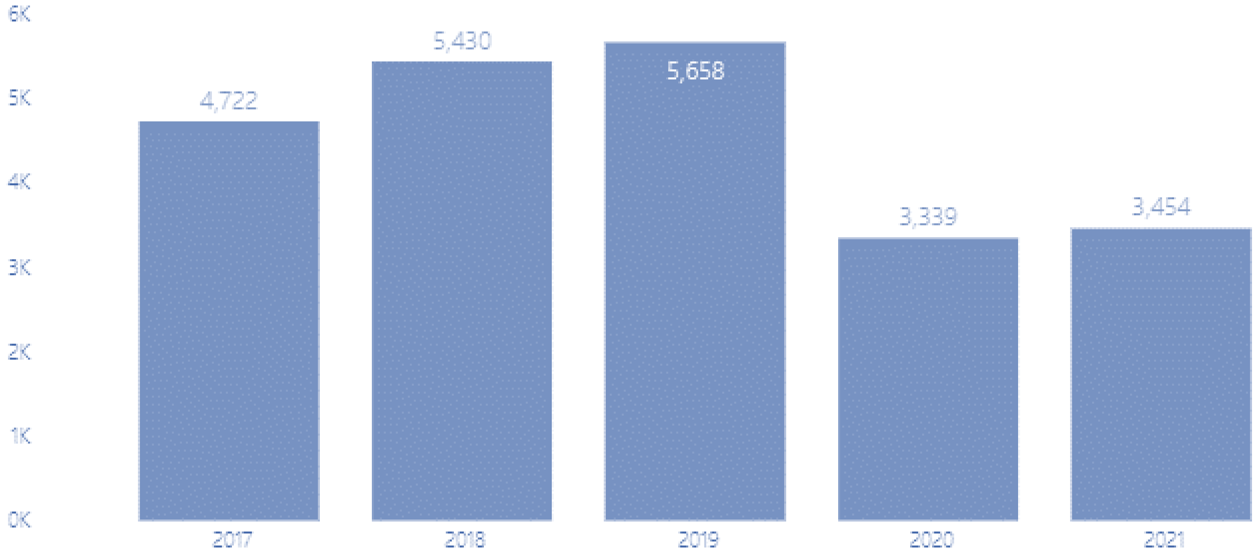
Five Year Visitor Trends – Destination Perth Tourism Region

Tourism WA reported that in the year ended March 22, 18.6 million daytrips were taken within the State of Western Australia and 9.7 million overnight (domestic and international) visitors came to or travelled within WA. Together, these visitors spent $10.2 billion in the State, $6.0 billion (59%) of which was spent in Regional WA.

The closure of Australia's international border on 20th March 2020 has meant almost no international visitors came to WA during this period. Similarly, the interstate border restrictions since the 5th April 2020, impacted interstate visitation.

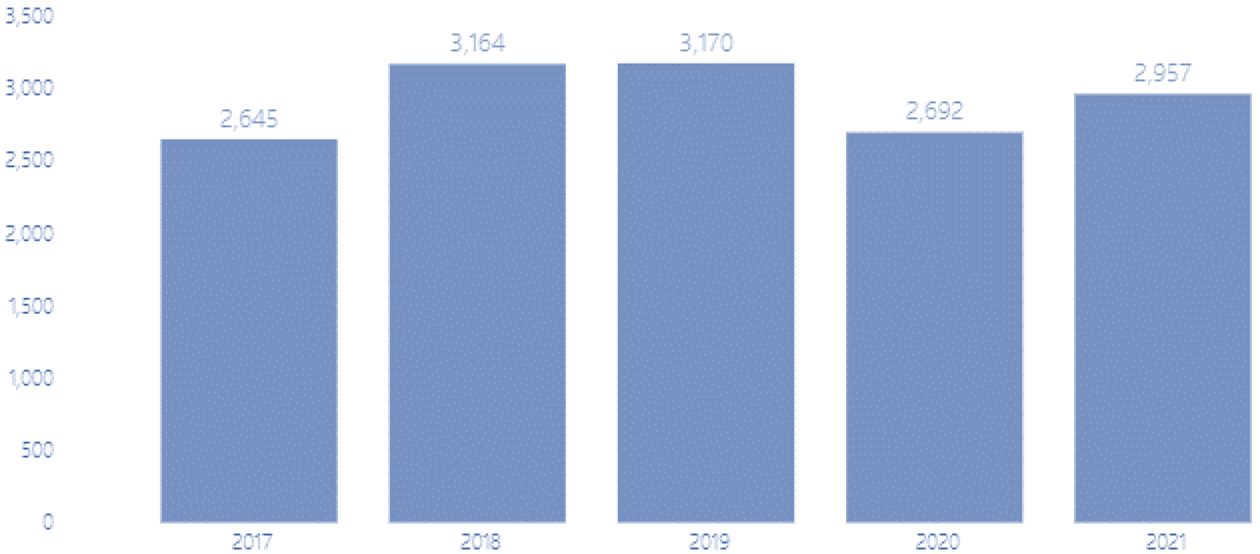
Compared to the previous 12 months, WA saw a (+)10% increase in the number of overnight visitors to/within WA. Total visitor spend in the State increased by (+) 24%, equivalent to (+) $2.0 billion. Comparing the results to YE December 2019, the most recent 12-month period not impacted by COVID, total visitor spend in WA decreased by (-) 24%, equivalent to (-) $3.2 billion.[3]

Destination Perth – International, Interstate and Intrastate Overnight Visitors (000) Year ending December

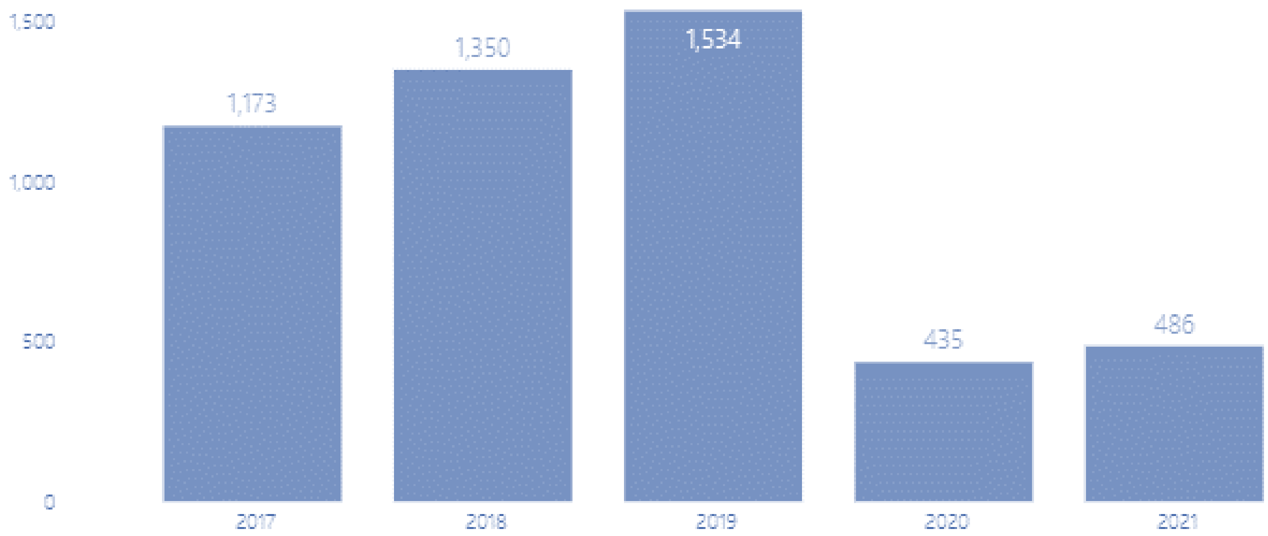


Though intrastate visitation had largely recovered by the end of 2021, international and intrastate visitors were still significantly down on 2019 and 2018 resulting in significantly less visitors to the Destination Perth tourism region overall, as shown in the following graphs.

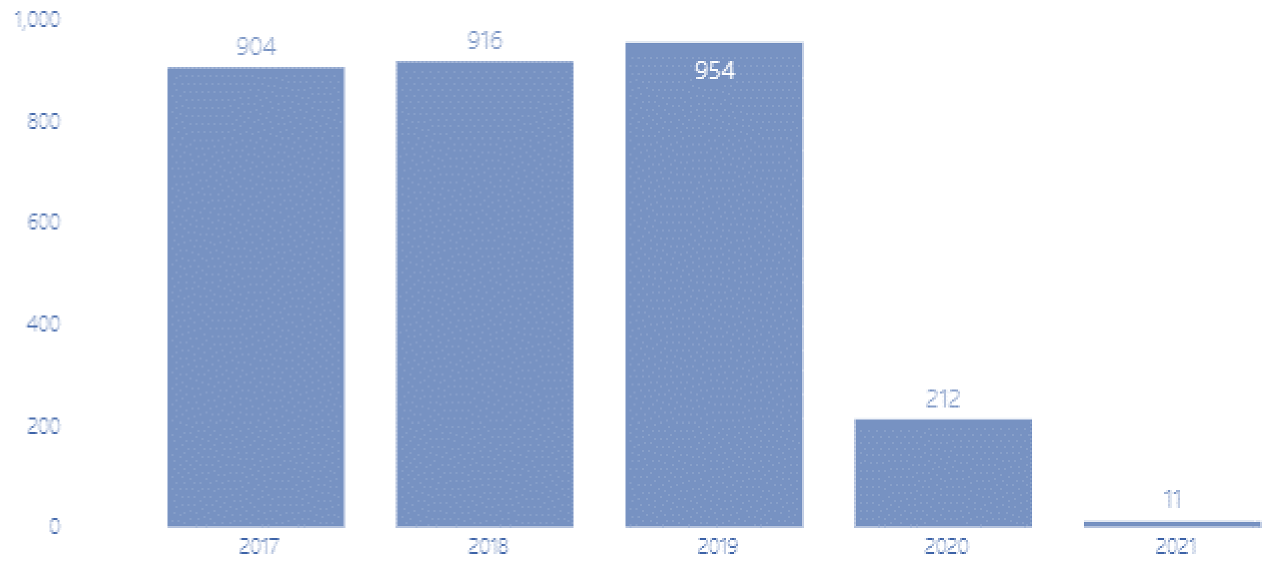
Destination Perth –Intrastate Visitors (000) Year ending December



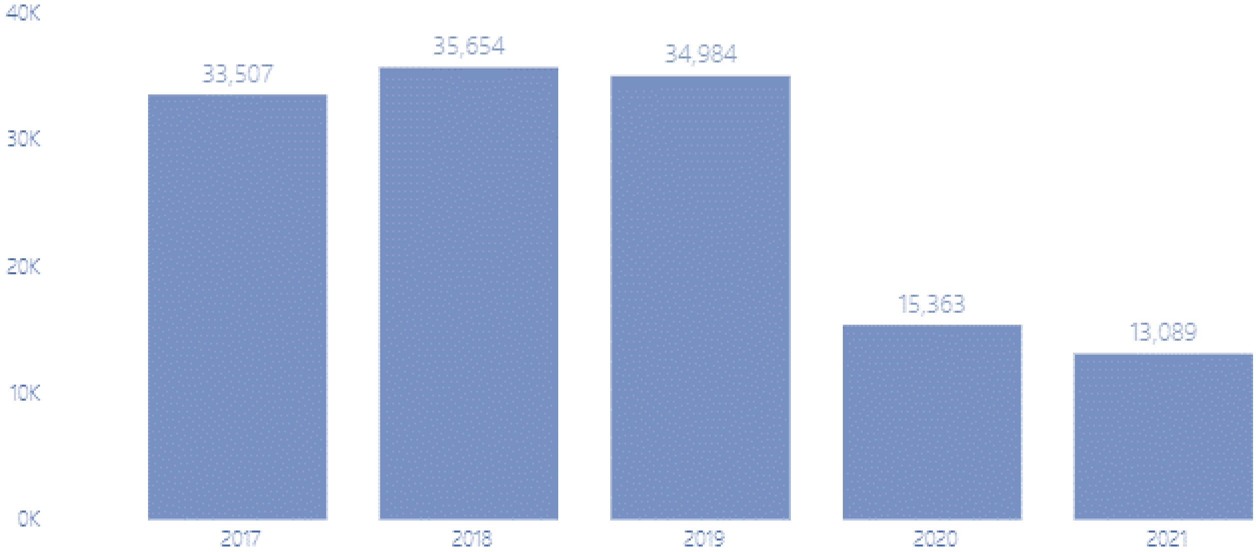
Destination Perth –Interstate Visitors (000) Year ending December



Destination Perth – International Visitors (000) Year ending December

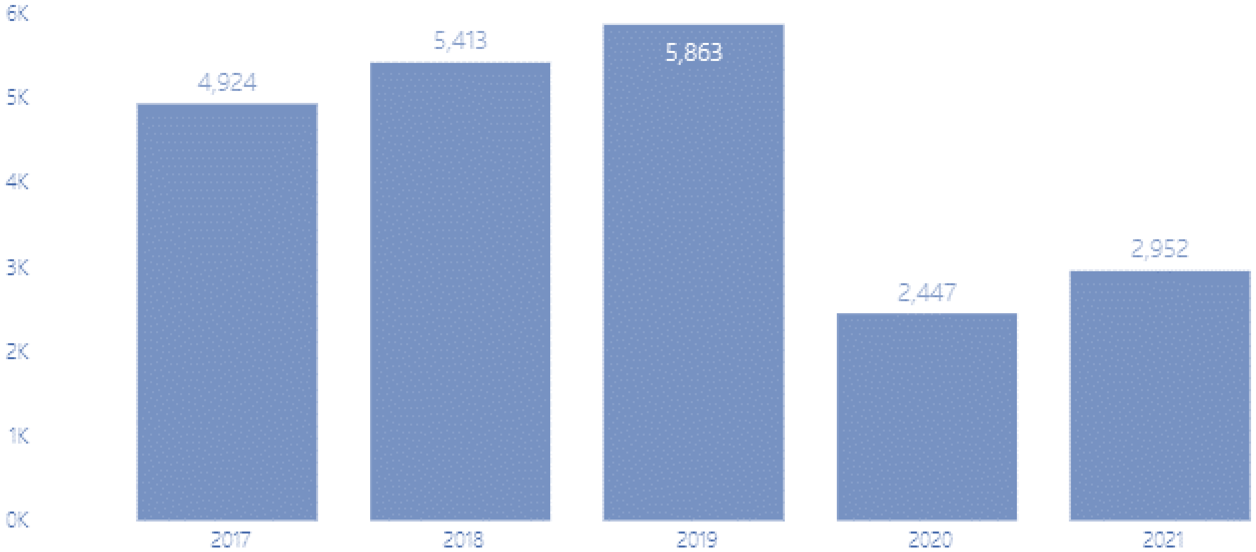


Destination Perth – International, Interstate and Intrastate Visitor Nights (000) Year ending December

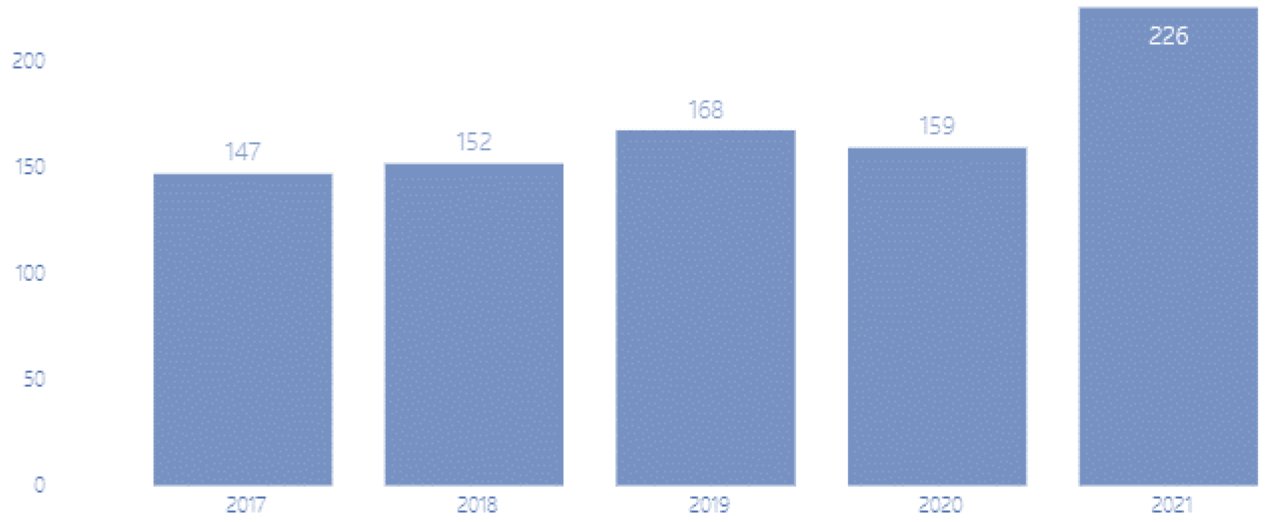


Visitor nights and spend also show a similar decline since the border closures in early 2020.

Destination Perth – International, Interstate and Intrastate Visitor Spend ($m) Year ending December

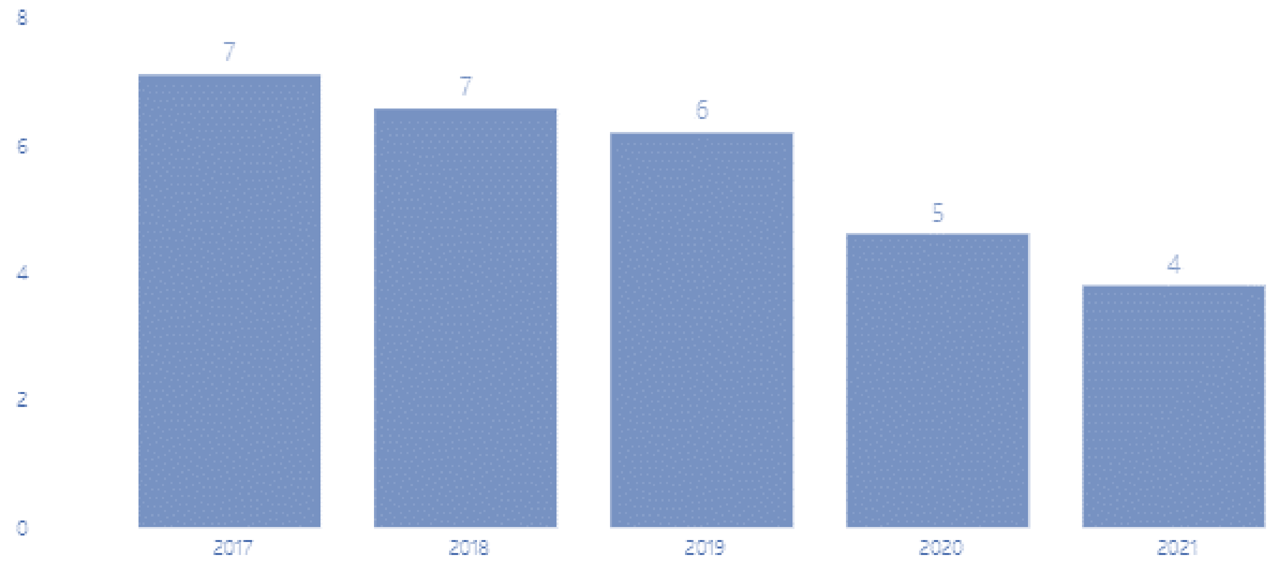


Destination Perth – International, Interstate and Intrastate Average Daily Visitor Spend ($) Year ending December



Average daily spend has increased from $168 pre-Covid to $226 in 2021, this may be in part due to Australian intrastate visitors spending more on holidays 'at home' due to not being able to travel internationally.

Destination Perth – International, Interstate and Intrastate Average Length of Stay (Nights) Year ending December



Tourism Region Visitation – Peel Region

Boddington is located within the Peel Region, near the popular tourism town of Dwellingup. The City of Mandurah is the most highly populated Local Government Area within the Peel Region and attracts significantly more visitors than the other local government areas within the region. This is in part due to Mandurah's coastal location and also due to the number of attractions and amenities on offer in the much larger city.

The tourism visitation statistics for Boddington are extremely limited and most useful data is grouped in with Mandurah for the Peel Region.

It could be roughly assumed that Boddington receives around 10% of the domestic visitors to the Peel Region, and a smaller proportion of the international visitors.

Older data from 2012 assumes an average length of stay in Boddington of 2.7 days, though the median would likely show mostly two-night weekend visitation (anecdotal evidence from tourism operators and other stakeholders).

Boddington is a popular spot for a stopover enroute to Albany. In 2012 it was estimated Boddington received around 45,000 day-visitors per year and 24,700 overnight visitors. This data is indicative only.[4] [5]

Map showing Local Government Areas.
Source: https://walga.asn.au/getattachment/About-WALGA/Structure/Zones

Peel Region Overnight Visitors

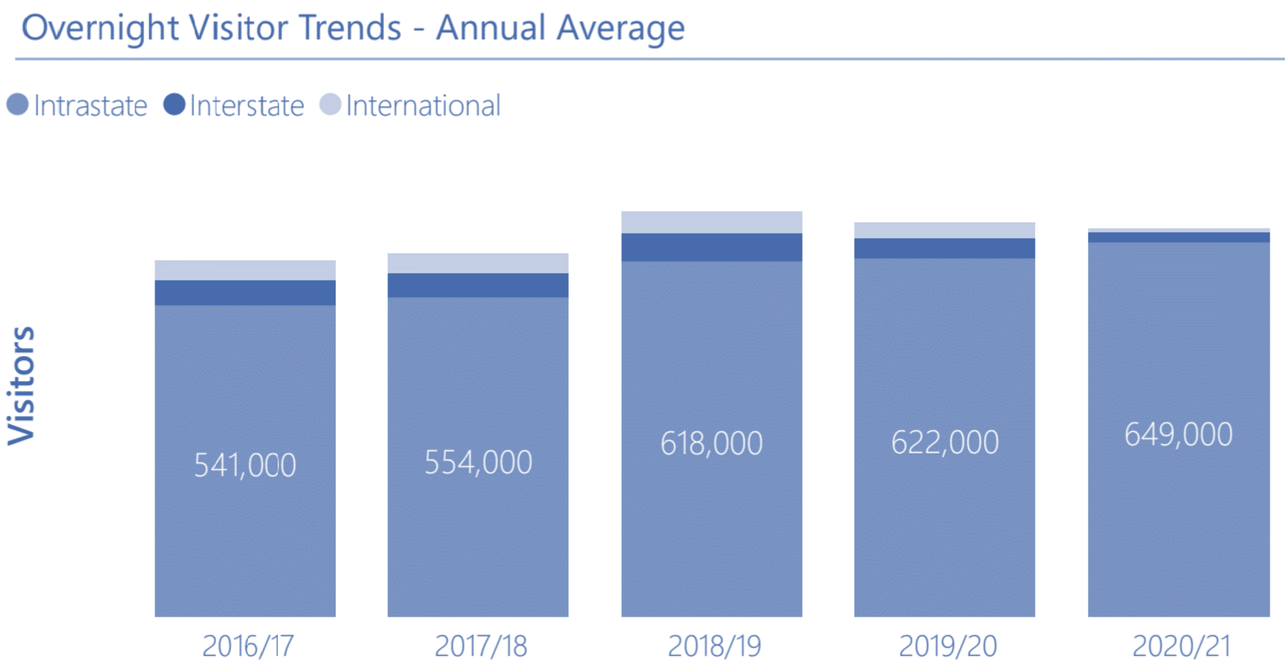
https://www.tourism.wa.gov.au/Publications%20Library/Markets%20and%20research/2022/RDC%20Factsheets%202021/RDC%20Factsheet%202021%20-%20Peel.pdf

The following data is sourced from the Tourism WA Peel Region Overnight Visitor Factsheet (2021). The Local Government Areas included to make up The Peel Region are the **Shire of Boddington**, Shire of Murray, Shire of Serpentine-Jarrahdale, Shire of Waroona, City of Mandurah. The data was prepared by Tourism WA Insights and Planning July 2022, from data sourced from Tourism Research Australia, International and National Visitor Surveys, 2021. Please see notes at the end of this section before reviewing the data supplied.

Overnight Visitor Summary - The Peel Region

The following data refers to visitors who have spent at least one night in The Peel Region:

Overnight Visitor Summary - The Peel Region		
Total Visitors	673,000	Annual average 2020/21
Total Visitor Nights	1,900,000	Annual average 2020/21
Total Spend ($ Million)	$240	Annual average 2018/19/20/21
Domestic Visitors	667,000	Annual average 2020/21
Domestic Nights	1,822,000	Annual average 2020/21
International Visitors	38,000	Annual average 2018/19
International Nights	78,000	Annual average 2018/19



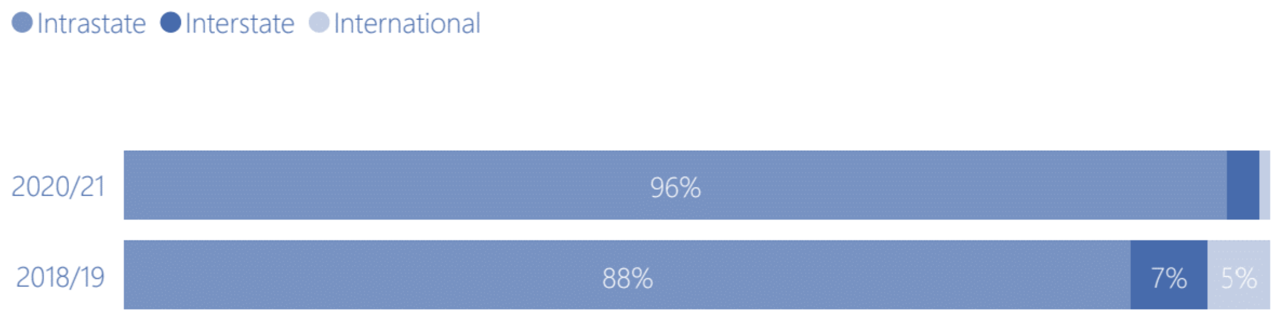
Visitors

Market	2016/17	2017/18	2018/19	2019/20	2020/21
International	33,000	33,000	38,000	27,000	6,000
Interstate	44,000	43,000	47,000	np	np
Intrastate	541,000	554,000	618,000	622,000	649,000
Total	618,000	630,000	703,000	683,000	673,000

Nights

Market	2016/17	2017/18	2018/19	2019/20	2020/21
International	637,000	501,000	567,000	427,000	78,000
Interstate	227,000	273,000	248,000	np	np
Intrastate	1,282,000	1,542,000	1,706,000	1,543,000	1,698,000
Total	2,145,000	2,315,000	2,521,000	2,117,000	1,900,000

Share of Overnight Visitors - change vs. pre-COVID



Overnight Visitor Metrics

	Avg. Trip Length 2020/21	Average Trip Spend 2018/19/20/21	Average Daily Spend 2018/19/20/21
Intrastate	2.6 Days	$305	$113
Total Domestic + International	2.8 Days	$349	$109

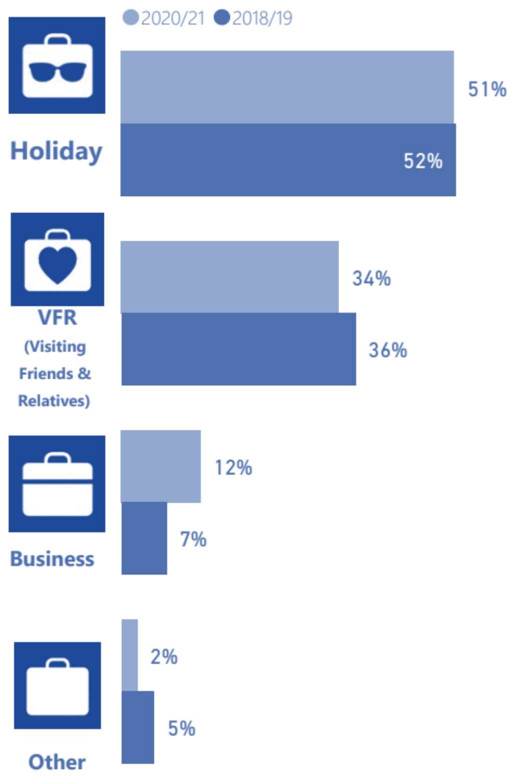
International and interstate metrics are unable to be provided due to the small sample size. 2

Domestic Overnight Visitor Details - The Peel Region

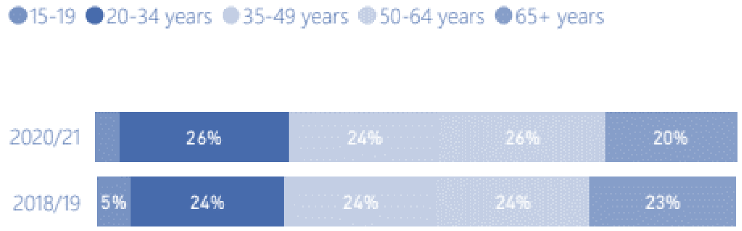
Two Year Average - 2020/21

The data supplied refers to visitors who have spent at least one night in The Peel Region

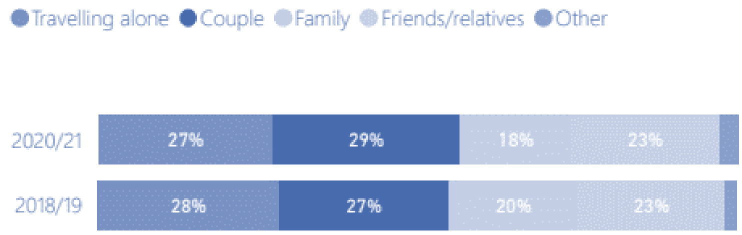
Purpose of Travel



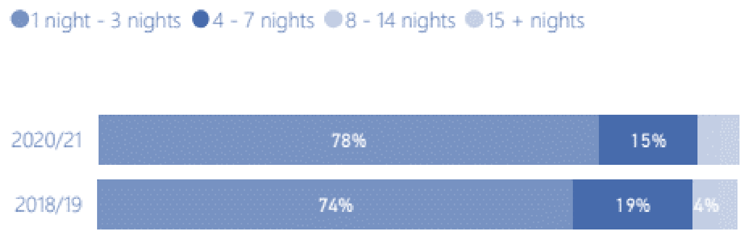
Age



Travel Party



Length of Stay



Top 3 accommodation (% of nights)

Accommodation	2018/19	2020/21
Friends or relatives property	56%	42%
Own property	8%	16%
Caravan or camping - non commercial	8%	9%

Top 3 activities

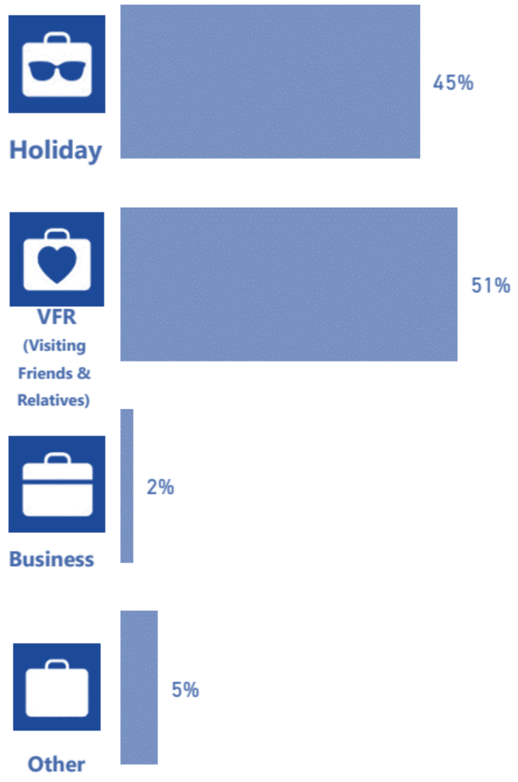
Activity	2018/19	2020/21
Eat out / dine at a restaurant and/or cafe	51%	38%
Visit friends & relatives	50%	39%
Go to the beach	27%	22%

International Overnight Visitor Details - The Peel Region

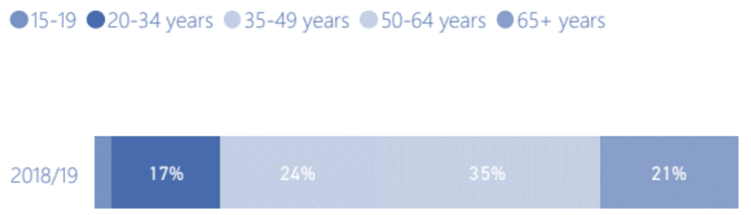
Two Year Average - 2018/19

The data in presented below refers to visitors who have spent at least one night in The Peel Region

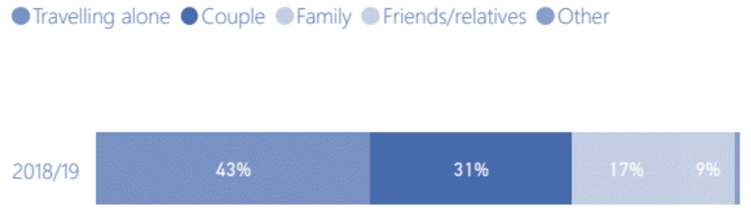
Purpose of Travel



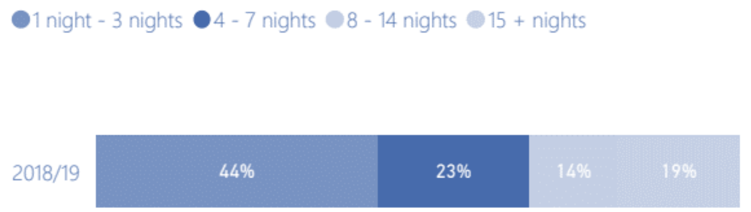
Age



Travel Party



Length of Stay



Top 3 accommodation (% of nights)

Accommodation	2018/19
Friends or relatives property	70%
Other Private Accommodation	7%
Own property	7%

Top 3 activities*

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

Activity	2018/19
Eat out / dine at a restaurant and/or cafe	95%
Go shopping for pleasure	80%
Sightseeing/looking around	77%

Important note regarding the data presented above

- All data is sourced from Tourism Research Australia's National and International Visitor Surveys (NVS and IVS). To increase the sample size and hence improve the reliability of the data, visitor and nights estimates in this document are based on an average of two calendar years. Spend estimates are based on an average of four calendar years as per TRA reporting.
- The demographics and trip details for domestic visitors have been updated to show comparisons between 2020/21 (current) and 2018/19 (pre-COVID).
- Due to the small number of international visitors to WA in 2020/21, only 2018/19 has been provided for international visitors.
- Methodology and definition changes are made to both the IVS and the NVS from time to time. As such, estimates in this factsheet are not comparable to previous factsheets. For further information, see NVS Methodology or IVS Methodology on Tourism Research Australia's website and the Changing Visitor Spend factsheet on Tourism WA's website.

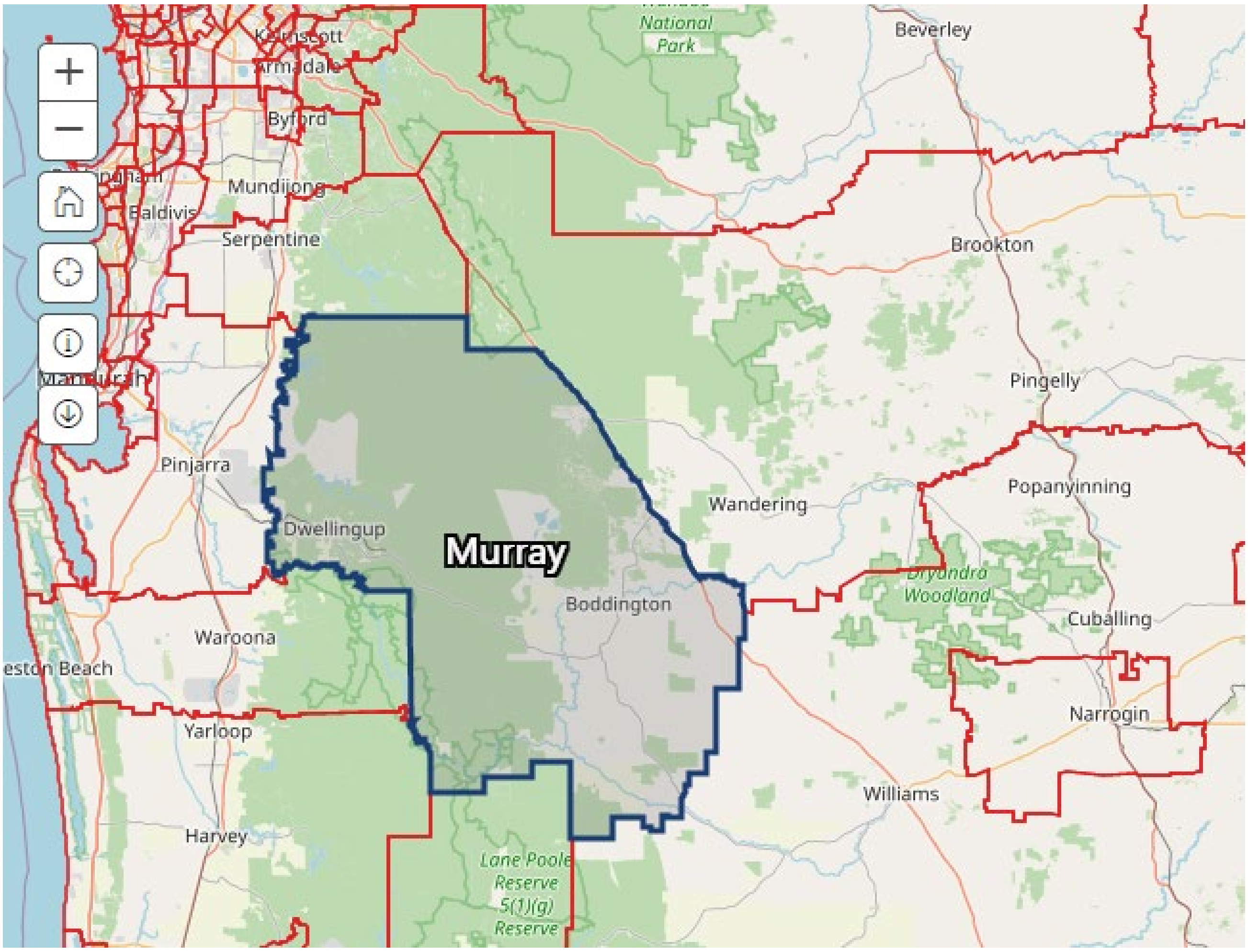
Sample size and confidence intervals

Year	2018/19			2020/21		
Market	Sample size	95% Confidence Interval Visitors (±)	95% Confidence Interval Nights (±)	Sample size	95% Confidence Interval Visitors (±)	95% Confidence Interval Nights (±)
Intrastate	546	10%	18%	491	10%	18%
Interstate	43	35%	46%	17	55%	65%
Domestic	589	9%	16%	508	9%	17%
International	406	11%	25%			

Image credit: www.facebook.com/marradongcountrytourism

Regional Visitation Statistics – Inland Statistical Regions

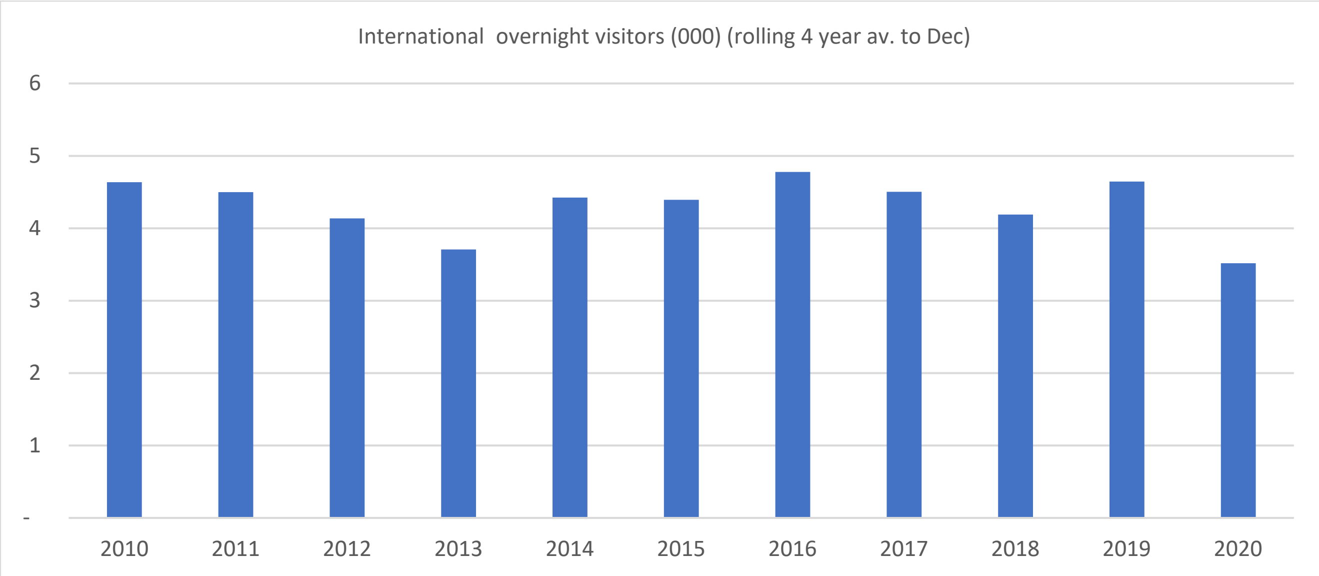
Tourism Research Australia collects and reports on information sourced from the National Visitor Survey and International Visitor Survey. Both surveys extrapolate out from sample data. For regional areas, this data can be unreliable and insufficient sample sizes can lead to unpublishable data. For this reason, the data in the graphs to follow is aggregated from the Statistical Level 2 Areas of Murray (including Boddington and Dwellingup), together with Wagin (including Williams), Narrogin and Brookton (including Pingelly and Wandering). Even by incorporating all of these destinations in the sample, the data is still unable to provide a high level of confidence for many of the breakdowns, and thus is considered only really useful for trends and indicative information to separate out visitor behaviour in the lesser visited inland towns as compared to the coastal locations which have higher visitation.



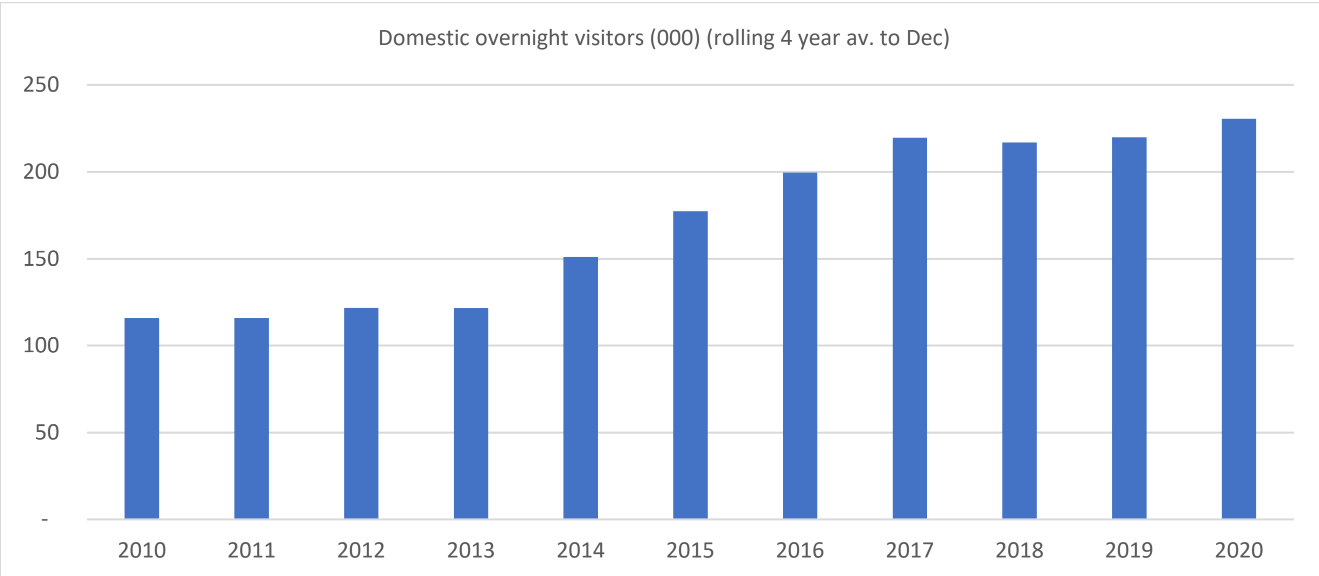
Regional Visitation Statistics – Murray, Wagin, Narrogin and Brookton

The following graphs are based on data sourced from Tourism Research Australia's International and National Visitor Surveys. As a four-year rolling average, the impacts of COVID can be seen in the four years to 2020 only. The data covers visitors to Murray (including Boddington and Dwellingup), together with Wagin (including Williams), Narrogin and Brookton (including Pingelly and Wandering).

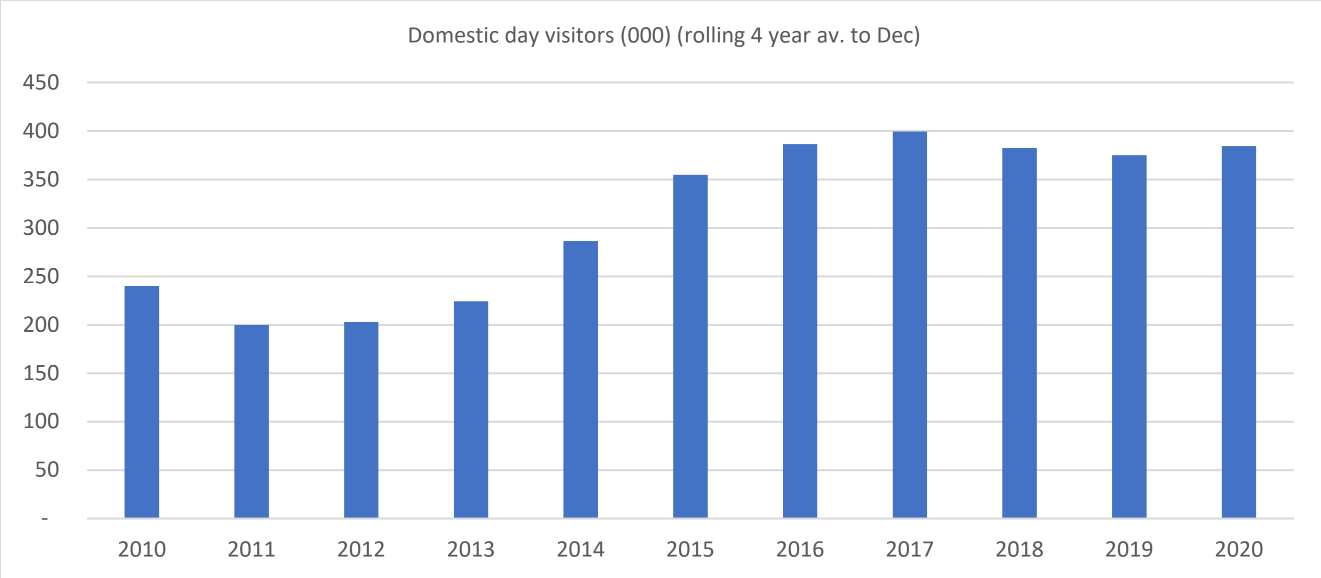
International visitors to the inland regions (including Boddington) for the 10-years to 2020 have remained relatively stable with the small fluctuations shown likely more reflective of sample size. It is estimated there were around 45,000 to 50,000 average annual international visitors in each of the four year periods from 2010 -2019.[6]



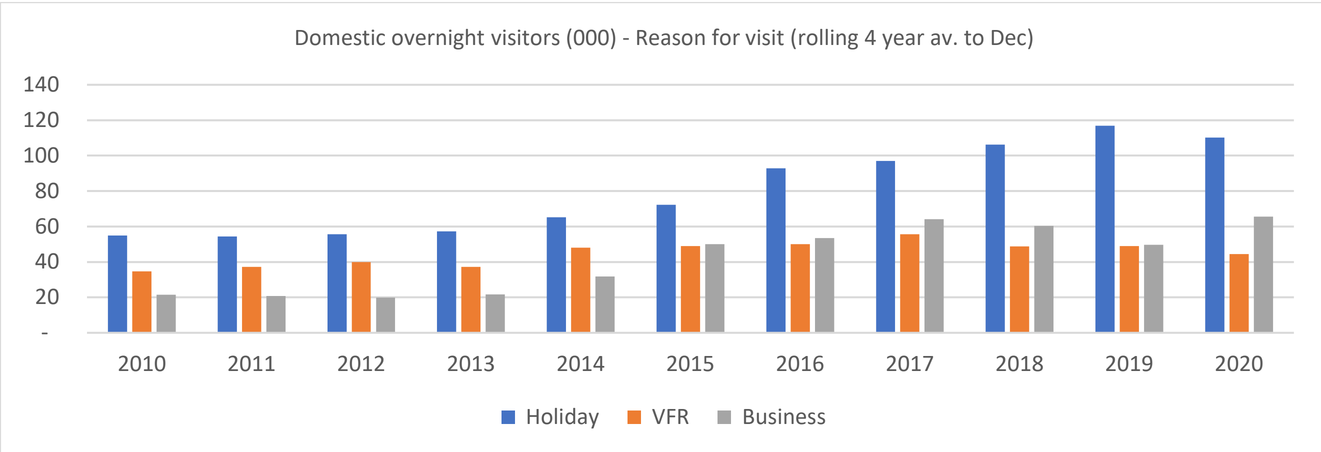
Domestic visitors for the 10-year period have shown growth from 116,000 per year in the four years to 2010 increasing to an estimated 230,000 per year in the four-years to 2020.

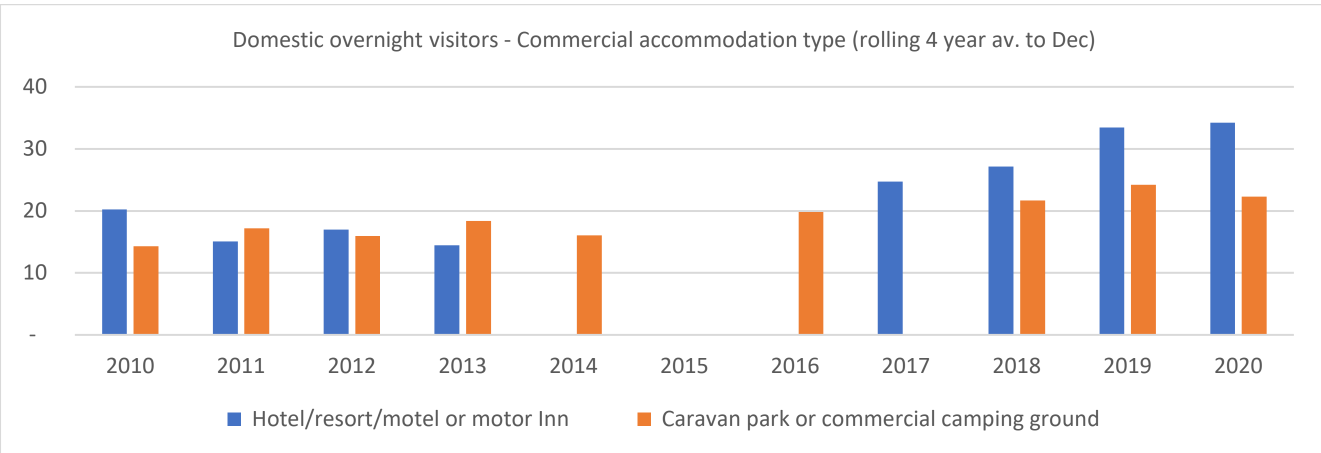


Domestic day visitors for the 10-year period have shown growth from 240,000 per year in the four years to 2010 increasing to an estimated 385,000 per year in the four-years to 2020.



When broken down to reason for visit, the number of domestic holiday makers has shown the most growth over the ten-year period, though business travel has also increased. Caravan park accommodation has shown some growth, but not as much as hotel accommodation.





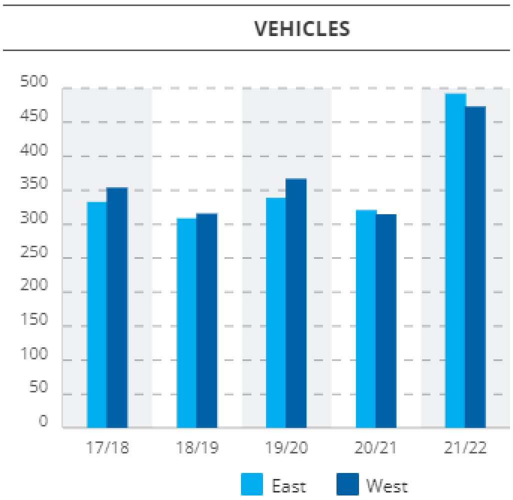
Road Traffic Counts[7]

The following road traffic counts include residents and visitors driving around the region as well as in and out of town.

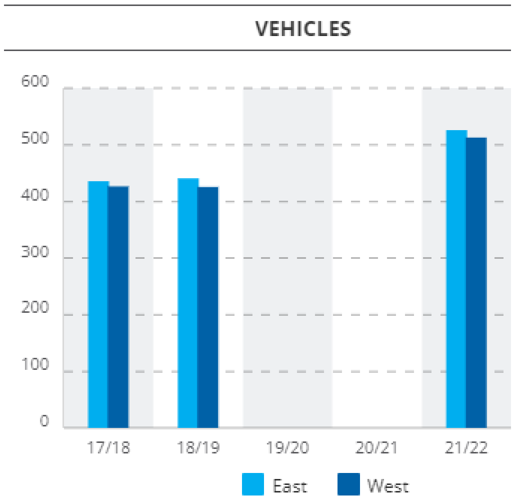
Traffic Volume Monday to Sunday 2021/22	Location	East	West	Total	Trucks
Traffic coming via Dwellingup	Pinjarra Williams Rd - East of Plant Access Rd	526	513	1,039	15.6%
Close to townsite (from Dwellingup)	Bannister Marradong Rd - South of Newmarket Rd	632	658	1,290	31.9%
Close to townsite (from East of townsite)	Crossman Rd, East of Bannister Marradong Rd (2020/21)	610	624	1,234	18.8%
Major turnoff from Albany Highway towards Boddington	Bannister Marradong Rd - West of Albany Hwy	492	473	965	23.8%

Traffic into and out of Boddington has shown growth from 2017/18 to 2021/22 as per the following five-year trend graphs. This correlates with the increases in domestic day trips and overnight visitors to the surrounding regions shown in the Tourism Research Australia data.

Bannister Marradong Rd - West of Albany Hwy



Pinjarra Williams Rd - East of Plant Access Rd



Tourism Overview – Boddington Attractions and Events

The following information is sourced and adapted from the Shire of Boddington and Peel Development Commission and Shire of Boddington websites, and from observations by the consultant during consultation and familiarisation visits.[8] The tourism overview puts the current tourism accommodation supply in context of the tourism events and attractions in the local government area. Located a one-and-a-half-hour drive from Perth and just 15 minutes west of Albany Highway, Boddington is a hidden gem that is fast becoming a popular location for tourists looking for a weekend getaway. The beautiful Hotham River meanders through the heart of the Boddington townsite and has become the centrepiece for the recently opened Hotham Park.

Current Attractions

Hotham Park

Hotham Park is quickly becoming a must-visit location among families and tourists after a major $2.3 million redevelopment. The adventure park is a partnership between the Shire of Boddington, South32 Worsley Alumina and Newmont Gold to deliver projects that provide benefit for the whole community. It integrates several activities for young and old including a challenging nature and adventure playground, flying fox, skate park, pump track, sports court, and a fitness hub and has hosted several events, including the South 32 Summer by the River series which saw live music, roving performers and children's entertainment over several evenings. Recently installed lighting extends the usage of the park so that residents and visitors can connect, be physically active and take pride in Boddington's natural assets. Hotham Park was recently awarded WA Park of the Year.

Image credit: www.facebook.com/marradongcountrytourism


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Image credit: www.facebook.com/marradongcountrytourism

Trails

The Tullis Bridge Trail is a 16km round trip along the disused Hotham Railway Line. Best hiked in spring while the hills are still green, the Tullis Bridge Trail makes the occasional historical reference to Boddington's past as a timber town. One of only a handful remaining timber put their efforts into overdrive with the expansion of their community-based recycling facility. The Hotham Park — Ranford Pool Trail is a much more relaxing 5km walk along the Hotham River, finishing at the recently upgraded Ranford Pool. Ranford Pool (otherwise known as Darmining Pool) is a naturally deeper part of the river which serviced the Tannin Factory when it was operational from the early 1930s to its closure in 1964. It is a popular spot for a picnic and a swim with remnants of old rope swings hanging in the trees that line the banks. Upgrades to existing walking trails and the creation of new trails include the acquisitive Boddington Sculpture Competition, the Shire of Boddington has plans for a sculpture trail to be added to the Trail Hub starting off at Hotham Park.

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Boddington Tullis Bridge and Rail Trail

The Hotham Park - Ranford Pool Trail is a much more relaxing 5km walk along the Hotham River, finishing at the recently upgraded Ranford Pool. Ranford Pool (otherwise known as Darmining Pool) is a naturally deeper part of the river which serviced the Tannin Factory when it was operational from the early 1930s to its closure in 1964. It is a popular spot for a picnic and a swim with remnants of old rope swings hanging in the trees that line the banks. Upgrades to existing walking trails and the creation of new trails include the acquisitive Boddington Sculpture Competition, the Shire of Boddington has plans for a sculpture trail to be added to the Trail Hub starting off at Hotham Park.

Wildlife

Teeming with wildlife, Boddington is home to several precious native species with a recent sighting of a numbat which were estimated to have been extinct from the Boddington area approximately 30 years ago. Carnaby's Cockatoos and Red-Tailed Black Cockatoos are frequently found in Boddington.

Events

Boddington Rodeo (Key Event)

Boddington is home to the largest single day Rodeo in Western Australia and celebrated its 45th year in 2021. The Boddington Lions Rodeo is held on the first Saturday in November each year, with the town population increasing from 1,200 residents (2016 census) to upwards of 5,000–6,000 over Rodeo weekend.

Operated by the Boddington Lions Club, the Rodeo has become more than the event itself, and has evolved into an entire weekend of festivities. The Friday Night Festival is held on Rodeo Eve at the Boddington Old School Oval and is a great family event hosted by the Shire and the Boddington Community Resource Centre. The rodeo also offers rides, food trucks, live music, games, and competitions. The Saturday morning is for markets, fresh doughnuts and coffee before visitors head down to the Rodeo Grounds for the main event.

An extensive program covering all age groups and skills, there are events like Barrel Racing, Steer wrestling and bull riding. The Bushman's Ball follows the Day's events are all over, with music and dancing.

Boddington Medieval Fayre and Feast

Medieval Themed Fayre and Feast. Re-enactments, role-play and arena battles as well as music and dance.

The Boddington Community Markets

The markets are held first Sunday monthly, located on the old school oval. Offering a diverse and unique range of retail and food stalls the markets is a great way to spend your Sunday morning Boddington. Always something for the kids, bouncy castle, and face painting.

Image credit: www.facebook.com/marradongcountrytourism

Boddington Country Muster

The event brings together some of WA's finest country artists to provide a community-minded and family-friendly event of music and dance, as well as market stalls and car displays.

Image credit: www.facebook.com/marradongcountrytourism

Boddington Field of Quilts

Hosted at the Boddington Arts Council, Johnston Street Boddington, this event attracts quilting enthusiasts from near and far.

The above events are important drivers of tourist accommodation occupancy in Boddington. However, the calendar of events for Boddington events, does not ensure that accommodation providers in the town achieve optimum occupancy, due to their lack of frequency.

For many regional locations local attractions ensure a constant supply of visitors, including repeat visitors.

Although Boddington has some wonderful events and attractions, both natural and man-made the current events are few and the list of iconic attractions is very limited.

In 2013 the Shire of Boddington commissioned consultants, TRC Tourism and Brighthouse Strategic Consulting to prepare a stage one tourism strategy.

It is interesting that upon a review of the key issues and success enablers in the earlier Draft Boddington Tourism Strategy 2013, all remain relevant today.

The key tourism development strategies in the 2013 report - product development (accommodation, events and attractions), tourism infrastructure (signage, visitor amenities and food and beverage offering) and awareness (marketing and promotion remain essentially unfulfilled at the present time.

Boddington Commercial Accommodation Supply

The following table lists the accommodation currently available in Boddington.

Business	Accommodation Type	Caravan RV Camp Sites	Accommodation	Shire Licensed	Google Reviews
Boddington Caravan Park	Caravan Sites and Accommodation	40	Old Police Station (sleeps 6) Caretaker's Accom (2 bedroom)	Y	4.2 stars from 141 reviews
Boddington Hotel	12 Donga" style single units, 4 motel type units, 4 staff bedrooms within the hotel proper	None	16 Rooms	Y	3.5 Stars from 179 reviews
Boddington Motel	Double Motel rooms	None	9 Rooms	Y	4.6 stars from 28 reviews
Boddington Retreat	2 bedroom cottage (sleeps 6)	None	2 bedrooms	N	4.6 stars from 18 reviews
Armoin - nature based camping	9 camping bays, 30 overflow bays - Self-contained vehicles only	39	Pop-up hire tents for special events	Y	4.7 stars from 15 reviews
Woolpack BnB Farmstay Crossman	3 Bedroom Farm-stay Accom,	None	3 Queen Size Beds (sleep 6)	N	5 Star (Airbnb) from 12 reviews
Free RV Camping	Sites for fully self-contained RV's	6-8	None	Y	4.6 stars from 7 reviews

Boddington Caravan Park

The Boddington Caravan Park is managed by the Shire of Boddington and has a variety of accommodation including powered caravan sites, powered camping sites, unpowered camping sites, the repurposed historic Police Station, and a two-bedroom manager's residence, which is currently utilised by the shire for short-term staff accommodation. The Police Station accommodates 6 guests in 3 cells (bunk accommodation) and a separate double bedroom. The Manager's residence has two bedrooms.

Conveniently located next to Hotham Park overlooking the river, the caravan park was extensively redeveloped in 2020 and now has an excellent site layout and good tourist facilities.

The park offers the following:

- Dog friendly
- Free Wi-Fi
- Town water
- Powered and unpowered sites
- Laundry and campers' kitchen
- Free BBQ's
- Communal fire pit (seasonal)
- A dump point is located nearby

Boddington Caravan Park site layout

Boddington Caravan Park internal streetscape

Aerial image of Boddington Caravan Park

Boddington Caravan Park and adjacent vacant land with potential for short-term accommodation

Boddington Hotel

The Boddington Hotel's sixteen self-contained rooms configured as three rooms with a queen-size bed and a single bed, 12 relocatable-style rooms with king single beds, plus three rooms in the hotel building, which have double beds and shared facilities.

Boddington Hotel and Accommodation

The hotel has consistently high all-year occupancy form mainly itinerant workers and contractors. Pricing is appropriate for the accommodation offered.

Boddington Motel

The Boddington Motel has nine, fully self-contained units with kitchenettes, a queen-size and a king single bed.

The motel enjoys reasonable occupancy from a similar market to the hotel i.e., workers and contractors visiting the town. The occupancy is consistent with that of similar regional towns, but there is capacity to increase occupancy levels.

Pricing is slightly lower than equivalent product in other similar regional locations.

Boddington Retreat

Located at 33 Johnstone Street, Boddington the retreat is a two-bedroom cottage, furnished un-hosted bed and breakfast establishment. It accommodated up to six guests for which linen, towels and all necessary items for tourist stays are provided.

Armoin Nature-Based camping and Farmstay

Armoin provides basic campground facilities with a farm-stay experience. The nine licenced campsites are unpowered and do not have sullage points, so it is best suited to self-contained caravans, motorhomes, campervans and camping trailers and tents.

There are two guest toilets and one shower for which a usage fee is charged. There is also a dump point available.

The campground occupancy is derived mainly from overflow from the town's caravan park as well as groups (birthday events etc.) and returning guests. For overflow occasions such as during the Boddington Rodeo event, Armoin has accommodated up to 120 guests.

Amoin's rates and occupancy are lower than would be anticipated for other campgrounds in regional towns or Parks and Wildlife campgrounds.

Woolpack BnB Farmstay Crossman

Woolpack BnB is located on Crossman Road approximately 10 minutes' drive from the centre of the town of Boddington. It comprises a three-bedroom house, 2-bathroom house with queen-size beds in all rooms.

Free (No Fee) RV Camping

The free RV camping area is on a recreational reserve adjacent to the Hotham River and other public amenities. It caters for 8-10 self-contained recreational vehicles and sites are fee and non-bookable.

The Shire of Boddington implemented its Free RV Camping zone in 2013 for approximately 8-10 fully self-contained RV's. Situated alongside the Hotham River and close to the town centre, visitor centre, community resource centre public amenities, and caravan park, Tourists with fully self-contained units can enjoy a safe and shady spot for up to 48 hours without charge.

Anecdotal evidence suggests that site occupancy percentage for the free-camping sites is much higher than the licenced caravan park and it appears single overnight visitation at the caravan park has suffered since the free-camping was approved. The self-sufficiency test for occupiers of the free-camping sites is being circumvented due to the close proximity of public ablutions to the free-camping area. The tourism multipliers

Visitor Amenities

The following table summarises the key visitor amenities in Boddington.

Amenities Type	Name
Tours and attractions (well known) including wineries	• Barna Mia Animal Sanctuary • Bibbulmun Track • Boddington Old School • Captain Fawcett 4x4 Commemorative Track • Williams Woolshed (nearby in Williams) • Jessie Martin Museum (nearby in Williams) • Hotham Ridge Estate (nearby in Wandering) • Drakesbrook Wines (nearby in Waroona)
Food and Beverage	• Boddington Hotel • Bitchin' Kitchen • 124 Rusty Camp • Boddington Bakery • The Double Shot Coffee Café • IGA Supermarket
Other amenities	• Foreshore playground and tourism amenities • ATM • Post office • Hardware store • Fuel and Gas • Tourist Information Centre • Swimming pool

Tourism potential – comparison to other similar destinations

Further development of the Boddington Caravan Park to include new family-friendly, affordable tourist accommodation options such as cabins or glamping pods would enhance opportunities to leverage increased visitation from new or improved attractions.

Improved accommodation options and the simultaneous development of appealing visitor attractions are synergistic and have tremendous potential to uplift regional tourism potential. Four-wheel drive adventure trails and interactive gold mining experiences are two unique experiences which could attract significant visitor numbers, and when supported by appealing accommodation options, would encourage visitors to stay in Boddington.

Similar regional towns such as Dwellingup and Nannup have successfully leveraged off their bush and river appeal with a focus on developing adventure offerings (such as mountain biking, four-wheel drive trails, hiking trails and water activities etc) to place them firmly on the visitor map. Their commercial caravan parks are receiving strong occupancies with tariffs above the tariffs charged by Boddington Caravan Park, even with strong competition from the ultra-low-cost Parks and Wildlife camping facilities nearby.

Adventure and immersive activities have the potential to encourage enthusiasts to visit multiple times each year, often during the off-season. The addition of regular events such as a four-wheel drive rally, produce markets and the existing rodeo may also boost occupancy. Increased visitation will present opportunities for improved food and beverage offerings which will in turn encourage visitors to return and stay longer, building a strong and resilient tourism industry. As the industry develops, there is an opportunity to increase tariffs and bring Boddington in line with the other more successful tourism destinations nearby, ensuring future viability and growth.

The following table shows a comparison of caravan park rates in Dwellingup, Boddington, and Nannup,

Rates for November 2022	Dwellingup Chalets and Caravan Park	Boddington Caravan Park Current	Nannup Caravan Park
Luxury Chalet/ Cabin	Spa Chalet 2 Guests Aircon, Spa & Ensuite $190.00 /night	N/A	N/A
Standard Chalet/ Cabin	Chalet 2-10 Guests 2 Bedroom, aircon, kitchen, ensuite $175.00 /night for 2 $25 extra Adult $16 extra Child	Old Police Station -6 Guests 3 Bedroom, Ensuite, Kitchenette, Aircon $155.00 /night for 2 $20 per extra person	Cabin 2 Bedroom, Ensuite, Kitchen, Riverfront, Aircon $160.00 /night for 2 $20 per extra adult
Budget Chalet/ Cabin	Cabin 2-5 Guests No ensuite Full Kitchen, Aircon $108.00 /night for 2 $20 extra Adult $12 extra Child	N/A	Comfort Tent with ensuite $109 for 2, without ensuite $99. Family Sized Tent (Sleeps up to 5) $109 for 2. $20 extra Adult $12 extra Child
Powered Caravan Site	$42.00 /night for 2 $16 extra Adult $9 extra Child	$30.00 /night for 2 $8 extra Adult	$49.00 /night for 2 $20 extra Adult $12 extra Child
Tent Site	$35.00 /night for 2 $16 extra Adult $9 extra Child	$20.00 /night for 2 $5 extra Adult	$34.00 /night for 2 $20 extra Adult $12 extra Child

Consultation

The accommodation audit of the study included a familiarisation field trip through the Boddington local government area (LGA) to view the existing tourism infrastructure and in particular the current tourist accommodation. Prior to the familiarisation visit, initial desktop consultation was conducted with all existing tourist accommodation properties, which included Boddington Caravan Park, Boddington Hotel, Boddington Motel, Boddington Retreat, Armoin - nature-based camping and the Woolpack BnB property at Crossman.

The accommodation operators were asked to provide their perceptions of the current and future tourist accommodation demand for Boddington, prospective public and private supply opportunities and to identify barriers or constraints to tourist accommodation development. The suitability of various styles of tourist accommodation was discussed in the context of the Boddington location.

All the operators were very forthcoming with details of their accommodation, target market, tariffs and occupancy. We have utilised this data to refine the tourist occupancy of commercial accommodation in Boddington from those that were obtained for the area from other sources.

The audit of existing commercial accommodation in Boddington table on page 33 of this report was prepared from online research and verified by the face-to-face meetings.

The two major mining companies, Newmont Gold Mining and South 32 (Worsley Alumina) were contacted to ascertain their current and anticipated future use of the commercial accommodation in the town and to seek the views of companies regarding perceived gaps in the business accommodation supply.

Brighthouse consulted with officers at the Peel Development Commission to investigate current state initiatives and planned future direction for the development of tourism in Boddington. The topic of grant funding for such projects was also canvassed.

Brighthouse's Principal Consultant also met with the Shire's CEO, Senior Planner and Manager, Works and Service and had subsequent discussions with the officers to seek specific information.

The information gleaned from the consultation process has helped inform this report and enabled the consultant to analyse findings in the context of the local community and market environment.

Brighthouse has a deep understanding of the small tourist accommodation investment landscape and a knowledge of tourist accommodation development and investment incentives. The findings from the consultation were utilised to develop a tourist accommodation gap matrix, which sought to match existing properties (supply) to the potential need for tourist accommodation development (demand).

Other types of land holdings were assessed as to their potential to accommodate small-scale tourist accommodation operations as a secondary activity to their core business e.g farm-stay and if there was potential for new tourist accommodation to be incorporated into existing public and community buildings, in the form of dormitory-style accommodation, to improve the supply of tourist beds during major events.

The consultation conversations provided insights into the issues confronting the future development of tourist accommodation in the locality.

Another important part of the desktop research phase was reviewing the various tourism marketing, strategic planning, and community development reports. Recommendations relating to general tourism and more particularly, tourism accommodation were noted.

Improvement supply through existing tourist accommodation operations

Based on consultation with all the existing accommodation providers in Boddington, which included visitation to each of the accommodation properties by the consultant, we have reached a conclusion about the potential for expansion of supply through the existing providers.

We consider that it is important to differentiate between the two primary markets for Boddington's short -stay accommodation, which to some degree may be influenced by operational decisions of the individual accommodation providers. For instance, from the consultation it appears that both the hotel and motel predominantly target workers and contactors who visit the town and make up the highest percentage of the room occupancy. Both properties also accommodate holiday travellers but their focus is on work-related travellers as the mainstay of their business.

In Boddington, the two private holiday bed and breakfast (BnB) accommodation providers - The Retreat and Woolpack, Armoin (camping and event glamping) and the Boddington Caravan Park target mainly holiday tourists as opposed to business tourists. Although not located in the Shire, the Quindanning Hotel should also be included in the tourist accommodation supply list for Boddington, as its holidaymaker guests are potentially combining their accommodation in Quindanning with visitation to the town of Boddington.

The Boddington Motel has a small adjacent block of land which could potentially allow for a limited expansion of the number of motel units on the site. However, the owners of the motel did not seem to be motivated to undertake further development at present.

Generally, accommodation alone does not drive destination demand. For most travellers, immersion in local experiences is of primary importance hence the popularity of local events, farm stays, forest chalets and wellness retreats, where guests become involved in their special interests, or agricultural, nature-based and health and wellbeing experiences. However, the advent of 'glamping' or glamorous camping, presents opportunities for destinations close to large population centres to provide unique short getaway holidays.

Visitors to Boddington tend to be more immersed in the immediate accommodation location than other geographical areas of Perth and surrounds. The purpose for travelling to Boddington is to predominantly experience events such as the Lion's Rodeo, Medieval Fayre and Feasts, Boddington Country Muster music festival and the field of Quilts. Other attractions are the history of the area and the natural landscape, notwithstanding those other attraction that enhance the enjoyment of the visit for many including the Hotham River Foreshore Adventure Park (winner of WA Park of the Year 2022).

Thus, an opportunity exists to develop a visitor market for short romantic, or de-stressing breaks, based around glamping accommodation in Boddington.

The Shire of Boddington could seek local landowners interested in tourist accommodation development and help facilitate such small-scale tourism developments, through minor changes to local planning regulations to allow those developments as primary or secondary uses of the land.

Whilst visiting the Boddington Caravan Park the consultants viewed vacant freehold land at Lot 18A, adjacent to the caravan park and also Lot 20. Brighthouse formed the opinion that an immediate opportunity exists to expand the supply of tourist accommodation by developing part of Lot 18A into a glamping accommodation facility. Cabins, glamping pods (solid wall and roofed safari tents) or tiny houses would be suitable for family holiday accommodation. The accommodation should be managed by the caravan park, which would provide better economies of scale and a more widely accepted tourist accommodation offer.

Flood Prone Zone Mitigation

There are potentially some issues with Lot 18A being partially flood prone and perhaps requiring the diversion of storm water for the adjacent road and properties. The flood level issue can be mitigated by raising the finished floor levels of the accommodation by the installation of stumps or pole foundations to a satisfactory level.

Lower standards can be applied to tourist sites on the basis that the consequences of flooding would be less than those associated with permanent housing. This position is supported by the numerous approvals to operate tourist caravan parks in flood prone locations in Australia. It also recognises the economic planning imperative of locating tourist related developments in proximity to natural features such as rivers

People occupying caravan and camping sites in a caravan, recreation vehicle or tent can quickly vacate themselves and their accommodation to safety in a flood event. In an unlikely or worst-case scenario, where there was insufficient time to remove the accommodation prior to water inundation due to flash flood, the loss of the asset would not equate to the loss of residential dwelling that is a person's principal place of residence.

The foundations and structure below acceptable flood levels of cabins glamping pods and tiny houses constructed in caravan parks in flood prone locations can be designed to withstand even extreme flood events. Therefore, risk associated with flood events can be successfully mitigated. Access to the short-term holiday accommodation units can be raised using boardwalk structure with the same high structural integrity. Car parking for accommodation occupants can be in a separate area that is raised to acceptable flood levels.

Caravan Parks – the mainstay of regional tourist accommodation

In Australia, the caravan and camping industry, including caravan parks, is a $23 billion industry that directly employs 53,000 people, manufactures 25,000 vehicles per annum, services over 740,000 vehicles on the road, generates 12 million trips and creates 60 million visitor nights across the country. It is an industry that is uniquely positioned to hold the foundation for ongoing tourism activity during and post the COVID-19 crisis.

In 2009 the Western Australian Government's Economics and Industry Standing Committee delivered the Inquiry into the Provision, Use and Regulation of Caravan Parks (and Camping Grounds) in Western Australia.

Tourism WA subsequently commissioned Brighthouse Strategic Consulting to further investigate the tourism recommendations made by the Parliamentary Inquiry and to assess the current and future needs of the caravan and camping sector. Findings in the Brighthouse report informed recommendations within the WA Caravan and Camping Action Plan 2013 - 2018 (Action Plan).

The Action Plan contained eleven recommendations aimed at improving the supply, delivery and promotion of caravan and camping experiences. It aimed to make Western Australia the nation's most attractive caravan and camping destination by providing upgraded and new infrastructure and affordable accommodation options to meet the diverse demands of travellers.

The $42 million Action Plan detailed clearly what is required for the future of caravanning and camping-based tourism in Western Australia.

Boddington was identified as priority area based being in a tourism location with an average annual occupancy over 60%. The limited available tourism visitation statistics impacted on its rating, although there is arguably sufficient potential demand to consider the merits of improved facilities providing a tourism drawcard to the area to meet visitor expectations and capitalise on the appeal of inland waterways such as the Hotham River, Caravan and camping became the most popular holiday type for Australian for the first time in 2019, with 60 million holiday nights, according to Tourism Research Australia. This is no easy achievement when we consider the significant competitive nature of the tourism accommodation sector.

The most recent (August 2022) annual Caravan Industry Australia's Consumer Sentiment Report, found that travellers identifying with caravanning and camping, were keen to explore Australia (71%), experience something different to usual life (65%) and to learn something about place and people (57%). This continues to show the value of caravan and camping in connecting Australians to regional destinations, and to the local stories of people and places they visit.

Caravan Industry Australia CEO, Stuart Lamont, commented on an earlier version of the industry research report - The State of Industry 2020 – 'When you reflect that for 24.8 million Australians and 8.4 million households, caravan and camping holidays have become an integral part of our national travelling behaviour.' The State of Industry report provides an important benchmark and highlights the importance of the caravan and camping sector to the performance of Australia's visitor economy.'

Despite the exponential growth of the caravan and camping market and its potential to enhance tourism by providing safe, affordable tourist accommodation, many LGAs do not embrace the development of caravan parks. Often highly suitable locations for caravan parks are excluded as a permitted use in the zoning tables of their town schemes.

It appears that the greatest potential to increase the supply of boutique tourist accommodation in the Boddington LGA to improve visitation and duration of stay, in the short-term is through further development of the Boddington Caravan Park. The availability of the shire-owned land Lot 18A, adjacent the existing caravan park provides an opportunity to for the shire to move quickly to increase tourist accommodation supply by constructing relocatable cabins, glamping tents or pods, or tiny houses in the site.

Appropriate Accommodation Options for Boddington

The following tourist accommodation options are grouped under appropriate user-interest categories. There is considerable potential for cross-over of accommodation styles between the various types of interests. For example, glamping accommodation is suited to farmstays, caravan parks and campgrounds, health and wellness retreats and bush retreats.

Glamping

From early accommodated safari tours across Africa, 'glamorous camping' or glamping has come a long way. No longer the preserve of canvas accommodation, such as yurts and safari tents, offerings now include luxury cabins, chalets, tiny houses, glamping pods, treehouses, geodomes, and glam-tainers (converted shipping containers) are more and more prevalent in holiday locations all over the world.

Glamping accommodation products have evolved over the last decade to be suitable for hot, cold, and moderate climates. For example newer iterations of glamping tents have solid walls and are similar to cabin accommodation experience, whilst maintaining the allure of the safari tent appearance.

Demand for the nature-based glamping experience is very much on the rise. The lack of traditional hospitality offerings, such as hotels and resorts in small and remote regional tourist locations has led to the development of specialised tourist accommodation at those locations.

These products are more aligned to the natural environment and often become an extension of the attraction's experience.

Operators of specialised glamping holiday accommodation properties have witnessed explosive demand due to their ability to provide socially separate, and more secluded accommodation compared to other higher-density forms of tourist accommodation.

The outdoor spaces surrounding camping-style accommodation products, present a much lower risk than the higher density accommodation in terms of transmission of airborne and contact spread diseases, such as COVID -19.

With no front desk staff, common areas and often no restaurant or bar, providers of this specialised holiday accommodation are perfectly positioned to enjoy higher financial returns from this high-growth market.

For regional and remote tourist accommodation providers or those who provide tourist accommodation as a secondary activity e.g., farmers and vineyards, glamping accommodation requires minimal capital input considering the potential financial return.

For that reason, glamping product is ideally suited to many locations throughout the Boddington LGA, particularly for small-scale accommodation developments.

Owners and operators of wineries, orchards and other horticulturalists, farmers, and other small land holders such as cideries and boutique breweries could introduce glamping accommodation as a secondary commercial activity, with the aim of increasing visitation to their primary business and adding to their commercial return from their properties.

Tour operators could seek to improve their yield from tourists by developing a glamping accommodation package.

Glamping product may be varied for the type of activity the operator provides. For example, luxury cabins, tree houses and glamping pods for short-term holiday accommodation may be more suited heavily vegetated locations due to potential fire risk.

Where accommodation may serve a dual purpose seasonally, i.e., tourist accommodation and worker accommodation for staff during harvest season, the glamping product may not be a suited as more standard cabins or tiny houses.

A growing trend of the glamping market is that travellers are seeking more quality options across a variety of price points. For experiential travellers wanting a comfortable home base that is convenient for 4-wheel driving, hiking, mountain-biking, and other low contact activities, glamping is the perfect solution.

The global glamping market was valued at $2.68 billion in 2012 and is projected to reach $7.11 billion by 2021, growing at a compound annual growth rate of 10.5% from 2022 to 2031. A rise in wellness travellers, estimated to represent 18% of all global tourism by the end of 2022, combined with an increase in caravanners and campers, half of whom are willing to try glamping on their next trip, has created the perfect environment for tourist accommodation providers to enter the glamping industry.[9]

The family travel segment dominates the glamping market, due to an increasing emphasis on maintaining family relationships and creating family memories. The 33-50 age group is the largest market segment by age, owing to their preference for comfortable and luxurious accommodation. Families with two children are predominant in the market, followed by couples.

Caravan Parks and Campgrounds

Caravan and camping became the most popular holiday type for Australian for the first time in 2019, with 60 million holiday nights, according to Tourism Research Australia. This is no easy achievement when we consider the significant competitive nature of the tourism accommodation sector.

Hire Motorhome

Caravan Industry Australia CEO, Stuart Lamont, commented on the research report, The State of Industry 2020 – The report provides an important benchmark and highlights the importance of the caravan and camping sector to the performance of Australia's visitor economy. 'When you reflect that there are 24.8 million Australians and 8.4 million households, caravan and camping holidays have become an integral part of our national travelling behaviour.

Despite the exponential growth of the caravan and camping market and its potential to enhance tourism by providing safe, affordable tourist accommodation, many LGAs do not embrace the development of caravan parks, through their exclusion of them as a permitted use in the zoning tables of their town schemes.

The caravan parks and campgrounds legislation was designed to provide uniform regulations for the development of caravan parks, campgrounds and defined tourist accommodation facilities throughout Western Australia.

In Boddington, the Shire-owned and operated caravan park and Armoin are the only licenced caravan parks. It appears from the consultation that Armoin's owner and operator has an interest and many good ideas for developing the facility but is constrained by time and capital cost.

The operator may be interested in sourcing available funding grants for the private sector to develop of tourist businesses.

Perhaps the greatest potential to increase the supply of tourist accommodation in Boddington and to improve visitation and duration of stay is through the caravan parks and camping grounds legislation. The regulations provide for overnight accommodation for travellers in user-provided caravans, recreational vehicles, and tents (self-owned or hired) as well as cabins, tourist park-homes, glamping tents, and even tiny houses, which are owned by the facility operators.

Example of Tiny House

If for instance, the Shire of Boddington were to permit a small number of campsites as secondary activity on properties such as farms, vineyards, orchards, horticultural properties, wineries, and boutique breweries, without scheme amendment or even planning application, the supply of boutique tourist accommodation would be substantially improved.

Solar Cabin

The planning exemption could cater for developments of 5 – 15 sites, which could comprise caravan, and camping sites and compliant tourist accommodation (according to the definition in the Caravan Parks and Campgrounds Regulations 1997). A major benefit would be the supply of sites, which would otherwise not be provided in the locality due to land availability to achieve economy of scale. Under the legislation, bring-your-own caravans, camper vans and tents could be accommodated, and the operators could also provide relocatable accommodation such as tourist cabins, tiny houses and glamping tents and pods. The provision of such miniature caravan parks would help meet the burgeoning demand from the sector and satisfy the future need for supply of tourist accommodation in Boddington.

Another major benefit of the above initiative would be the potential for the accommodation to be utilised for short-term temporary worker accommodation for specific harvest and planting periods in farm and horticultural properties, thereby removing one of the key issues surrounding agricultural production in times of high employment.

The resulting increase in supply though the approval of applications by owners of variously designated land in the Town Scheme would help increase tourist accommodation supply without cost to the community. Such accommodation would be in addition to the recommended development of the existing Boddington Caravan Park. The 'mini caravan parks' would require licencing by the Shire and need to meet the regulations set out in the Caravan Parks and Camping Grounds Regulations 1997.

Health, Wellness and Spa Retreats

Revenue for the health and wellness spa industry in Australia has grown rapidly and revenue is expected to rise at an annualised rate of 3.6% over the next five years to $578.7 million.

Wellness spas have become popular with a wider client base, including men, corporate users, couples and families. Demand growth from domestic and international tourists has also benefited industry operators over the period, Guest accommodation is a significant attractor to the spa and wellness retreat experience.

The health and wellness spas industry is in a major growth stage of its economic life cycle … widespread societal concern for health and appearance has underpinned industry growth.

In the wider Perth region users are offered a relatively small number of wellness retreats, mostly in the Perth Hills area, including Hidden Valley Eco Lodges & Day Spa and Amaroo Retreat & Spa. The allure of the natural tranquil landscapes and the small distance from the state's main centre of population makes the outer Perth regions an attractive location for the establishment of health and wellness businesses.

While Access Life Health & Fitness conducts Health and Fitness Training in Boddington, there does not appear to be any established health retreats in the LGA. There is perhaps an opportunity here for an operator to establish a retreat with short-stay accommodation and reach out to people in this niche market.

Agritourism and Farmstays

Agritourism is generally understood as travellers visiting working farms to gain exposure to the rural lifestyle. Farmstay experiences vary greatly but a common theme is the genuine rural experience that travellers can't get elsewhere.

Food tourism, is becoming an increasingly important sector of the Australian economy, providing direct and indirect benefits to Australian agribusinesses and regional economies. Farmstays exist all over the world and are particularly prevalent in prevalent in Australia, New Zealand the United Kingdom and Europe, as consumers desire to stay at a rural location to better understand where their food comes from, learn how it is produced and experience food where it is produced.

According to regional development consultants, Regionality, 'agritourism is a billion-dollar business in Australia. 'Agri-food and tourism have been identified as two of five key tourism growth sectors over the next decade. Agri-food opportunities identified to grow at around 3.6 per cent annually by 2030 and tourism expected to continue to grow faster than the national economy.'

Agritourism has an important role to play, not only in the economy but more especially in helping maintain the viability of Australian farms.

Recent CSIRO analysis predicts the specialist sector is set to boom, with figures set to double over the next 10 years. Australian food and agribusiness could reach $250 billion by 2030, according to a September 2019 CSIRO report highlighting the importance of agritourism in regional areas.

Agritourism and Farmstay travellers seek out farm or food-related experiences, including on-site meals made from a farm's produce, farmer's markets, produce outlets and natural attractions) for enjoyment, education, or to participate in agricultural activities and events.

Agritourism activities are widely varied and include tourist accommodation, regional markets, farm and winery tours, self-picking experiences and farm gate sales, direct shop front outlets with produce tastings of wine, craft beer and distilled spirits, fruit, vegetables, nuts, meat and seafood, gourmet foods (cheese, olives, condiments, and confectionary), cooking classes, wine festivals and restaurants sourcing local produce.

There are family-friendly farmstays which will teach children about animals and there are farms reserved for adults, so they can relax and enjoy the outdoors.

The styles of accommodation provided at farmstays can potentially include farmhouse accommodation and B&Bs, cabins and chalets, farm shed and barn accommodation, bring-your-own caravans, RVs and tents and glamping. Perhaps the way to increase in tourist accommodation supply at farm venues is through the granting of approval for small numbers of caravan and camping sites (and associated cabin accommodation), as explored in the Caravan parks and Campgrounds section earlier in this report.

Bed and Breakfasts (BnB)

Bed and breakfast accommodation is generally defined as an existing dwelling in which temporary or short-term accommodation is provided on a commercial basis by the permanent residents of the dwelling and where:

- meals are provided for guests only, and

- cooking facilities for the preparation of meals are not provided within guests' rooms, and
- dormitory-style accommodation is not provided.

However, this narrow definition does not consider the various ways in which bed and breakfast accommodation has evolved in recent years.

BnB accommodation has been traditionally provided by private houses that let bedrooms or suites for short term stay, with all the hospitality of a hotel being provided by the host. BnB accommodation is perceived as quieter and offering more of the comforts of home. Most offer a home cooked meal, generally a generous or gourmet breakfast, which has become an important feature of such accommodation.

The estimated size of the BnB market is estimated at $71.6 million, which is a projected decline of 10.5%, mostly due to the CONVID-19 epidemic. While the reposting of the decline in BnB revenue may be initially alarming, it is somewhat distorted by the advent and exponential growth of similar product to small-scale hosted accommodation, such as non-hosted holiday houses, apartments, and room-letting within residential homes, without the normal hosted features expected in traditional BnBs.[10]

According to IBISWorld, domestic tourists account for the largest proportion of industry revenue. Consequently, the number of domestic tourist visitor nights significantly affects consumer demand and industry revenue growth. When domestic tourist visitor nights increase, more consumers are likely to use bed and breakfast (BnB) accommodation when travelling, providing a boost to industry revenue.

The value of the Australian dollar (as well as the current CONVID-19 epidemic) primarily influences the number of domestic tourist visitor nights by making it cheaper or more expensive to travel domestically rather than abroad. The number of domestic tourist visitor nights is expected to grow through years 2021-25, providing an opportunity for the industry to grow its revenue.

Industry operators have faced intensifying competition from accommodation-sharing networks such as Airbnb, which offer similar facilities and amenities to a bed and breakfast (B&B), often at a lower price. In addition, online accommodation aggregator companies, such as Stayz, make prices transparent in the accommodation sector, which has put pressure on industry operators to keep prices low to stay competitive.

Platforms such as Airbnb provide short-stay rental of residential dwellings where a property owner can rent out a home, unit or individual room. It is estimated that short stay renting of residential dwellings can resemble a traditional bed & breakfast style experience, excluding the breakfast service, particularly if the property is 'hosted'. Part of the visitor experience and attraction of bed & breakfast establishments is the interaction with the host.

The lack of registration of many properties using the AirBnB platform has led to issues concerning noise nuisance and impact on the peaceful enjoyment and safety of residential neighbours. There is also a concern regarding public liability and other insurances, where properties are let for tourist occupancy without proper local government approval. This issue has been the subject of LGA and state enquiries and Many LGAs are adopting so-called 'party house' local laws.

There are two tourist accommodation properties in Boddington (both not licenced by the shire), The Retreat and Woolpack Bed and Breakfast. It would be helpful if both properties were engaged with the shire and the local tourism industry to further opportunities to raise the area's tourism profile.

Bush Retreats

The reason many tourists visit the Boddington is its accessibility to the State Forest.

Around half of Boddington Shire is State Forest (predominantly jarrah and marri), making it ideal for hiking, camping, picnics, birdwatching and viewing wildflowers in Spring. A 2km walk trail along the river provides wheelchair access between the caravan park and Ranford Pool, a favourite fishing, birdwatching, and picnic place. Another favourite picnic and fishing spot is Lions Weir closer to town. The Bibbulmun Track passes through the Shire with Long Gully Bridge on the Harvey Quindanning Road providing an excellent access point for trekkers. Much of the national park and state forest landscape is currently constrained from tourist accommodation development, due to environmental conservation, bushfire risk, and drinking water catchment policy.[11]

To maximise the tourism potential of Boddington, in the same way that Dwellingup has become a nature-based tourist location, all avenues need to be explored that will enable tourist accommodation to be developed in the important conservation and bushfire risk areas.

The advances in small-scale alternative wastewater treatment technology, the knowledge and understanding of eco-tourists of the necessity for conservation of the natural estate and the improvements in bushfire risk management may allow for the review of current restrictive policies that prevent any development in these areas.

The DBCA, through its Parks and Wildlife section, successfully manages or controls several small campgrounds and accommodation facilities in national parks.

Staying in accommodation, whilst immersing in natural bush or forest provides a far more enjoyable experience, for many travellers, than staying in tourist outside those areas and commuting to them daily.

Proposed planning reforms recognise that the protection of property or infrastructure may be secondary to the social and economic development of a region. The distinction between commercial tourist accommodation and residential homes needs to be considered. If human safety can be satisfied, the asset may be considered replaceable, and its bushfire construction level determined to the degree necessary. Access and egress to tourist accommodation developments in the event of natural disasters, remains critical as is early notification and an evacuation management plan.

Some of the primary tourist attractions in Western Australia are the walking, mountain bike and 4-wheel driving trails that proliferate in state forests and national parks. The popularity of the trails presents opportunities for the development of boutique tourist accommodation which could act as drop-off points for travellers intending to use the tracks. Ideally, the trailheads should be accessible from the accommodation, which suggests the accommodation should be located a relatively short distance away.

Backpacker Hostels

The term "hostel" dates to the old French term ‘hôstel’ which means inn, lodgings, or shelter. The expression "youth hostel" is first recorded at the beginning of the 1900's in Germany by Richard Schirrmann, a German teacher who organized field trips & visits with his students. Schirrmann had the idea of using schools that were empty during holidays as guest houses for young people that were travelling in groups in the countryside. The idea caught on very quickly and spread through Europe. In time, the concept of hostel has broadened, and now hostels accept guests of all ages, providing cheap but comfortable accommodation and a unique atmosphere that cannot be found in hotels.

'Backpacker' refers to a person travelling with a backpack. Hostels and youth hostels became backpackers' hostels in Australia since backpackers were the main customers.

The audit of tourist accommodation for Boddington did not identify any dedicated backpack hostels. However, a small number of 'group accommodation' facilities exist in the town during key events, such as the Boddington Rodeo.

The lack of backpacker hostels in Boddington area may be attributed to:

- a general lack of demand in the area for backpacker accommodation
- the lack of public transport and
- the availability of other forms of low-cost accommodation, such as campgrounds and other accommodation on the Airbnb platform

There is potential to expand the availability of short-stay accommodation in Boddington during significant tourism events by utilising Shirrmann's concept of using schools and other public buildings in the town such as churches and community halls, for temporary dormitory-style accommodation.

Barriers to Tourist Accommodation Development

To attract tourists, several matters concerning the development of tourist accommodation need to be considered, for example, visual amenity, urban design, heritage, and planning controls - the conservation and enhancement of the environment and landscape is paramount.

However, several factors may inhibit Boddington LGA from capitalising on this opportunity. These factors include

- Limited tourism product in the region;
- Lack of stakeholder interest/engagement;
- The application of planning regulations is not conducive to small-scale tourist accommodation development, according to some operators;
- No apparent Integration and implementation of tourism strategy across the Peel Region, particularly Boddington, Dwellingup, Pinjarra and Mandurah;
- Limited tourism industry knowledge and customer service capabilities;
- Low profile of tourism in the region;
- Lack of sufficient hospitality services in town; and
- The by-pass road to Williams means that most tourist traffic does not pass through Boddington.

Key Issues

- The Alumina Refinery (Worsley) Agreement Act 1973 and the obligations it places on the State need to be considered during the preparation of local strategic planning documents and during the consideration of any statutory planning proposals;
- The mining buffer, as delineated by the Department of Mines, Industry Page 14 Regulation and Safety, needs to be protected to ensure the extraction of mineral resources is not compromised in the longer-term;
- Agricultural/rural activities need to be protected from unnecessary fragmentation;
- The extraction of mineral resources and development of the land for other purposes must occur in a staged manner, to ensure mineral resources can be extracted in the longer-term; This effectively locks out large swathes of land from development;
- Planning processes need to accommodate opportunities for tourist use in bushfire and flood-prone zones, subject to acceptable risk-mitigation plans being developed.
- Industrial areas and industrial development need to be protected from the encroachment of more sensitive land uses; and
- The design of tourism related development should be sympathetic to the landscape.

Suitability of Existing Supply of Accommodation

The two main private sector accommodation providers in the town consider their market to be workers and contractors who visit Boddington for work related activities. Both attract some tourist visitation; however, it is not their primary focus.

The commercial accommodation providers in the town enjoy higher than average occupancy than that of similar regional locations. There does not appear to be any appetite for raising occupancy through marketing, product improvement or further development.

One commercial accommodation business cited onerous and unreasonable planning conditions as a reason for not having a greater visibility to tourists. They suggested that the conditions have led to them almost totally withdrawing from offering accommodation to tourists.

A shortage of family holiday accommodation appears to be a gap in supply of tourist accommodation in Boddington.

Analysis of trends and best practice in comparative jurisdictions

When considering potential projects such as the further development of tourism supply in Boddington it is prudent to analyse the success (and failure) of like projects in similar jurisdictions.

While the findings of John Kotter, published in the works 'Leading Change' (1996) and McKinsey & Co's 'The irrational side of change management' 2007 found that 70 percent of change programs fail, that percentage can be significantly reduced by building a compelling story, role modelling (best practice examples) and reinforcing mechanisms (planning and execution).

Brighthouse has drawn on two diverse examples where the development of tourist caravan parks and accommodation has been integral to improvement of tourism visitation.

There are many supporters of the sentiments in the misquoted line 'Build it and they will come', from the film 'Field of Dreams' (1989). However, caution is recommended for this approach.

Assuming that there is a conclusive case for the need for additional tourist accommodation it does not automatically follow that the accommodation development will provide a reasonable return on its capital investment. Certainly, arguments can be mounted that economic returns should not be the single decision influencer. In many instances, social and community considerations balance the scorecard.

The case for development of additional tourist accommodation supply in Boddington requires consideration of many factors including:

- Does the proposed accommodation fulfil an unmet market need?
- Does it increase diversity in the supply of tourist accommodation?
- Will there be a major impact on viability of existing tourist accommodation providers in the town
- Whether or not the existing hospitality infrastructure, particularly food and beverage services, can meet the needs of an influx of visitors to the town?

Comparison of Boddington to Dwellingup as a Tourist Destination

Dwellingup was judged WA's Top Mall Tourist Town at the 2021 GWN Top Tourism Town Awards.

It offers similar nature-based experiences to Boddington, including natural forests, rivers and trails, but is much more developed on WA's tourism map.

The $2.5 million Dwellingup Trails and Visitor Centre offers an immersive experience for all visitors. Featuring state-of-the-art technology virtual reality experiences, interactive touch maps and information screens, up-to-date trail maps and information and the iconic fully restored 1938 Mack Truck fire tender.

Dwellingup is identified for its hiking and mountain bike trails, water and forest adventures. The high visitation to the town has led to tourism support and hospitality businesses thriving.

The Shire of Murray has been very proactive in promoting Dwellingup as a mainstay of the Shire's tourism offer and has established a project to harness Dwellingup's tourism potential.

The development project components are:

- Hotham Valley Railway Rail Relocation - relocation of the rail triangle and the implementation of a new train turntable
- Visitor Centre Expansion - redevelopment of an expanded and transformed Dwellingup History and Visitor Information Centre with additional toilets and hot showers
- Precinct Development-skate Park, pump track and additional facilities
- Munda Biddi Trail and Bibbulmun Track - realignment of the two through the town to meet at the Trails Centre

Boddington can leverage off Dwellingup's high visibility by adding complimentary tourism product. It is important that Boddington differentiates itself sufficiently so that it is not just considered a tourism overflow of Dwellingup and so that tourists attracted to Dwellingup will combine a visit to Boddington on their travels.

Caravan Park Revenue Management

Pricing plays an important role in hospitality businesses, none more so than caravan parks, which can be extremely competitive, due to the options available to their highly mobile customers and the accessibility of low-cost, low specification options such as Parks and Wildlife campgrounds and Main Road rest stops.

Competitors are certainly not the only factor that should influence pricing. The relationship between tariffs and occupancy is critical as the alternatives of high rates, which result in low occupancy and low rates, leading to high occupancy, may have a detrimental influence of the financial return to the caravan park operator.

Factors that influence both pricing sensitivity and occupancy are:

- Seasonality - the time of year may affect the decisions of tourist travellers to travel to certain locations;
- Suitability of the product on offer – are the sites large enough for the current users, who may have larger caravans now than in earlier times? Is the accommodation suitable for families and individual travellers? Are different price points for sites and accommodation available for those travellers who may be comfortable with basic accommodation rather than accommodation that includes all the comforts of home. Does the park provide caravan sites and campsites that are both powered and unpowered?
- More importantly, what are the underlying factors behind tourists travelling to the location – events, attractions, natural environment or food and beverage?

Many caravan park and tourist accommodation operators consider price to be the most important criterion in the consumer decision. It is one of the more important elements of the tourism marketing mix, but not necessarily due to financial yield for the operator or attraction of customers.

According to Middleton in *The Role of Price and Pricing in Tourism Marketing*, pricing is one of the most important elements in the tourism marketing mix. Tourism customers rate the product at a price and without a price there is no indication of value. Pricing decisions are therefore essential for the profitability of the tourist establishment, as it has a tremendous impact on demand and sales volume. Pricing is also often considered an indication of quality...Although the pricing element is the most important one of the marketing mix in terms of profitability, pricing cannot be seen in isolation from the other elements".[12]

Consumer perception carries the greatest weight in the various decisions made by tourists - the choice of destination, the purchase of goods and services while on holiday, and the decision whether to return to the destination. Perceptions are the consumer's subjective reality. Perception and is particularly important because consumers are becoming more and more discriminating.

Occupancy also plays a role in tourist accommodation pricing. After all, a vacant or unsold room achieves no revenue so pricing to maximise occupancy can often be a better tactic than pricing to maximise profit on them individually. In a highly competitive location, it's sometimes necessary to lure guests in with lower rates. However, higher occupancy can often be achieved by through other means including:

- Location
- Reputation
- Size
- Market demographics
- Level of competition
- Type of services offered

The relationship between tariffs and occupancy led to the development of yield management strategies. Yield management was the catalyst for the evolution of revenue management when it was used by the airline industry to manage supply and demand for flights. For example, different prices may have been charged for the same flight depending on when the ticket was bought or what seat was required. Hotels began utilising the principle in the late 1980s and into the 1990s.

These yield management strategies have evolved to be included in many hospitality operations, including hotels, motels resorts and caravan parks. Properly applied, yield management techniques will provide tourist accommodation operators with the maximum financial return from their asset investment.

The optimum number of caravan park sites and tourist accommodation units on a property is finite. Sites and room must be sold or the opportunity benefit of the development is lost. Revenue per available site or accommodation room is highly perishable – an unsold site or room produces nil revenue but the fixed cost of providing the site or room remains (wages, maintenance etc.).

Yield Management Formula

A simple formula for determining the yield percentage is

Yield management Percentage = (Achieved Revenue / Maximum Potential Revenue) x 100

As an example:

1. If on a particular day the Boddington Caravan Park had 25 of its 35 powered caravan sites occupied at full current rate of $30 per night (2 people), it would achieve revenue of $750.00 (25x$30=$750) for the day. The potential revenue if all the powered caravan sites were occupied would be $1050.00 (35x$30=$1050). Therefore, the yield percentage is:

   $750 (25x$30=$750 **/ $1050** (35x30=$1,050) **X 100 = 71.4%**

2. The aim of yield management is simply to determine the appropriate pricing to achieve 100% occupancy, or as near as possible to that occupancy. For example, if a reduction of $5.00 in the daily site rate achieved an increase in occupancy of 20%, the resultant revenue and yield percentage would be:

   $750 (30x$25=750) **/ $875** (35x25=$875) **= 85.7%**

Important Note – Through the tariff reduction of $5.00, additional revenue of $125.00 was achieved and another 5 sites were occupied.

Based on caravan park industry averages the earnings before interest, tax, depreciation, and amortisation (EBITDA) is 47% of the total revenue from sites, based on an average occupied site tariff of $50 per day at an annual average daily occupancy of 50%.

Therefore, the calculated cost to the operator of providing a site is $23.50 per day.

In the above example for Boddington Caravan Park both pricing arrangements would yield the Shire $750 revenue for the day.

In the first example, where the tariff is $30 per day there are 25 sites occupied and the cost (based in industry average daily occupied site costs) is $23.50, resulting in profit per occupied site of $6.50 or $162.50 for the subject day.

In the second example, where the tariff is reduced to $25, the profit per occupied site drops to $1.50 or $45.00 (based on the increased number of sites occupied on the day.

Thus, the reduction in daily site charge, although increasing occupancy by 20%, results in a reduction of 27.6% or $117.50 in financial return.

We have used the above detailed explanation of revenue management to illustrate our proposition that the current tariffs at the Boddington are too low. This is supported by the comparison of tariffs at other similar regional WA caravan park locations in the table on page 37, of this report, comparing Boddington Caravan Park's tariffs with those of Dwellingup and Nannup Caravan Parks.

The following tables were compiled by BDO Economics for Caravan Industry Australia from data collected from the monitoring of member caravan parks throughout Australia that use Newbooks and RMS Caravan Park Reservation and Management Systems. The data for each state was analysed separately.

The average daily rates are the average tariffs for the state cluster, occupancy is the average for the subject caravan parks in the state, and revenue per available room (RevPAR) is the total revenue received by the subject WA caravan parks, divided by the total number of powered sites.

Powered Sites Data Summary			
State	Average Daily Rate	Occupancy %	Revenue per Available Room
Western Australia	$61.36	66.3	$30.27

Unpowered Sites (Camping Sites) Data Summary			
State	Average Daily Rate	Occupancy %	Revenue per Available Room
Western Australia	$49.08	33.48	$16.43

Cabin Data Summary			
State	Average Daily Rate	Occupancy %	Revenue per Available Room
Western Australia	$193.29	66.3	$128.16

Source – Caravan Industry Australia Accommodation Report January 2021

Useful information gleaned from the comparing the revenue and occupancy data of the Boddington Caravan Park to the above tables includes:

- The tariff charged by the Boddington Caravan Park for powered and unpowered sites is well below the average for other Western Australian caravan parks;
- The occupancy of the Boddington Caravan Park is significantly below the average for Western Australian caravan parks; and
- The RevPAR for Boddington Caravan Park is also below the average for Western Australian caravan parks.

The table below is constructed from Boddington Caravan Park data supplied by the Shire of Boddington.

Combined Boddington Caravan Park - Caravan and Camping Sites			
Location	Average Daily Rate	Occupancy %	Revenue per Available Room
Boddington	$34.50	51.6	$17.20

The data in the table above for Boddington Caravan Park has a slightly lower than optimum confidence rating as the powered caravan sites, powered camping sites unpowered camping sites are combined in the revenue and occupancy data provided by the Shire.

Nevertheless, the Boddington Caravan Park data indicate substantial opportunity of improvement and a blank canvas in terms of potential redevelopment and potential growth of revenue and occupancy.

The answer to improvement appears to reside in the addressing the following key factors:

- Increasing tariffs;
- Improving marketing;
- Adding to the number and variety of attractions and events; and
- Expansion of product mix – the inclusion of high yielding tourist accommodation.

It is considered that given the limited number of available sites at the caravan park, an initial increase in site tariffs to match those charged by Dwellingup Caravan Park would not lead to the feared lower yield from the caravan park. In fact, even if the increased tariffs led to a significant fall in occupancy, the financial return from the caravan park would be improved over the current receipts. This is demonstrated in the calculations below:

Using the yield calculation 1 above as the current base tariff and occupancy, the revenue and profit achieved are $750.00 and $162.50 respectively.

If the current Boddington Caravan Park's site tariff $30 was increased to match Dwellingup Caravan Park's caravan site tariff of $40.00, and the daily site occupancy remained the same, the revenue would increase to $1,000 and the profit to $412.50.

(25x$40=$1,000) – (25x$23.50=$587.50) = $412.50

However, some may be sceptical that the site occupancy would remain at 71.4% as per example 1. To further illustrate the financial benefit of increasing tariffs we have calculated a reduction in occupancy of 30% from that used in the example 1 and the Dwellingup comparison:

(15x$40=$600) – (15x$23.50=$325.50) = $274.50

The above demonstrates that even if increasing the current daily caravan park site tariffs to a level that is consistent with similar comparative caravan parks, resulted in a decrease of 40% of daily site occupancy, the net return to the shire would increase by 69% over the current net return.

Social and Economic Benefits of Expansion of the Boddington Caravan Park

An Economic Impact Assessment (EIA) was undertaken as part of the proposed tourist accommodation development, to provide a clear understanding of the direct and indirect economic contribution associated with the development and operation of the establishment.

In assessing the economic contribution and benefits, a customised Input-Output (IO) model was developed for this project, whereby a range of model drivers were developed to give an indication of the impacts in terms of output, value added activity, employment generated, and wages and salaries paid.

An IO model is a useful tool as a snapshot of the economic flows in the economy. The model can be used to provide estimates of the sensitivity of the size of the local Boddington economy and its components (measured by employment and value added) to changes within industries. An example might be a ten per cent increase in demand for full time equivalent (FTE) positions in Boddington area during the construction phase of the project. This might lead to an increase in upstream activities, for example local transport and haulage services and local contractors that sell their output to the project proponents. This sort of analysis can be used at the industry-wide level to estimate IO multipliers – that is, the total economy-wide impact on employment or output resulting from a change in one industry, considering the change in demand for the outputs of other industries.

The economic contribution of the Boddington project can be traced through the economic system via:

- Direct impacts, which are the first round of effects from direct operational expenditure on goods, labour and services directly used by the project; and
- Indirect or Flow-on impacts, which comprise the second and subsequent round effects of increased purchases by suppliers in response to demand for their goods and services from the project.
- Induced impact, focuses on the expenditures made by workers involved in the project (both on-site and in supplying industries) and their families.

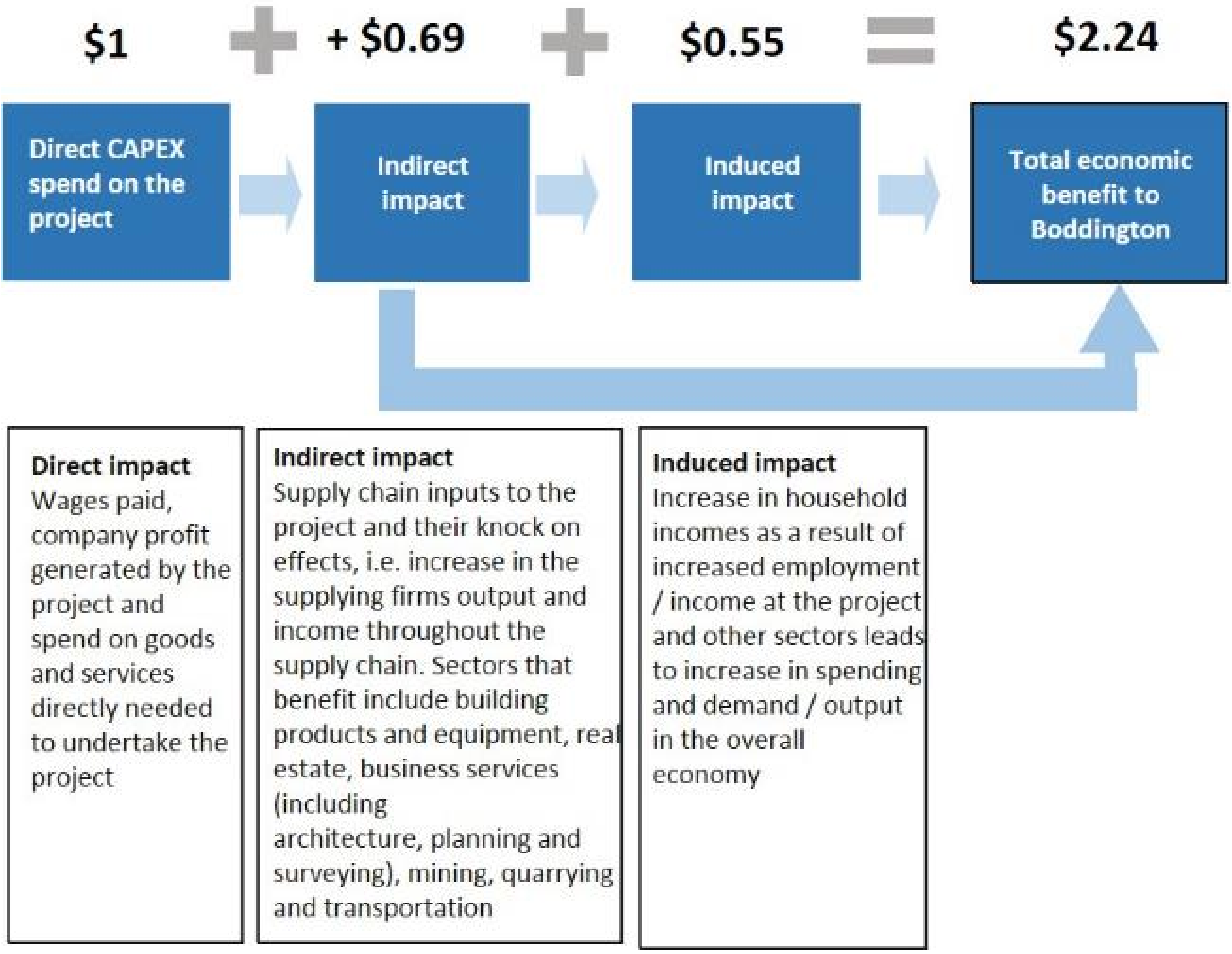
The aggregate economic impact assessment of both the construction and operations components of the potential development of tourist accommodation adjacent to the existing Boddington Caravan Park yields significant economic benefits to the Shire of Boddington.

Firstly, the economic impacts associated with the construction phase are shown in the figure below. As can be seen for every dollar spent as capital expenditure on the construction of the development (which includes wages paid, equipment hires, materials purchased, and services procured) through the process of flow on spending from this outlay (i.e. indirect and induced impacts) a total of $2.24 is generated for the local economy.

To arrive at this calculation, using ABS multipliers and a customised input-output table for the project we anticipate that approximately 30% of the estimated total $1.2 million project estimated construction cost will be retained within the Shire of Boddington. The remaining the 70% will be spent on wages, goods and services sourced from outside the shire, but within the state of Western Australia.

$1 spent on construction output generates a total of $2.24 in total economic activity (i.e., GRP increase).

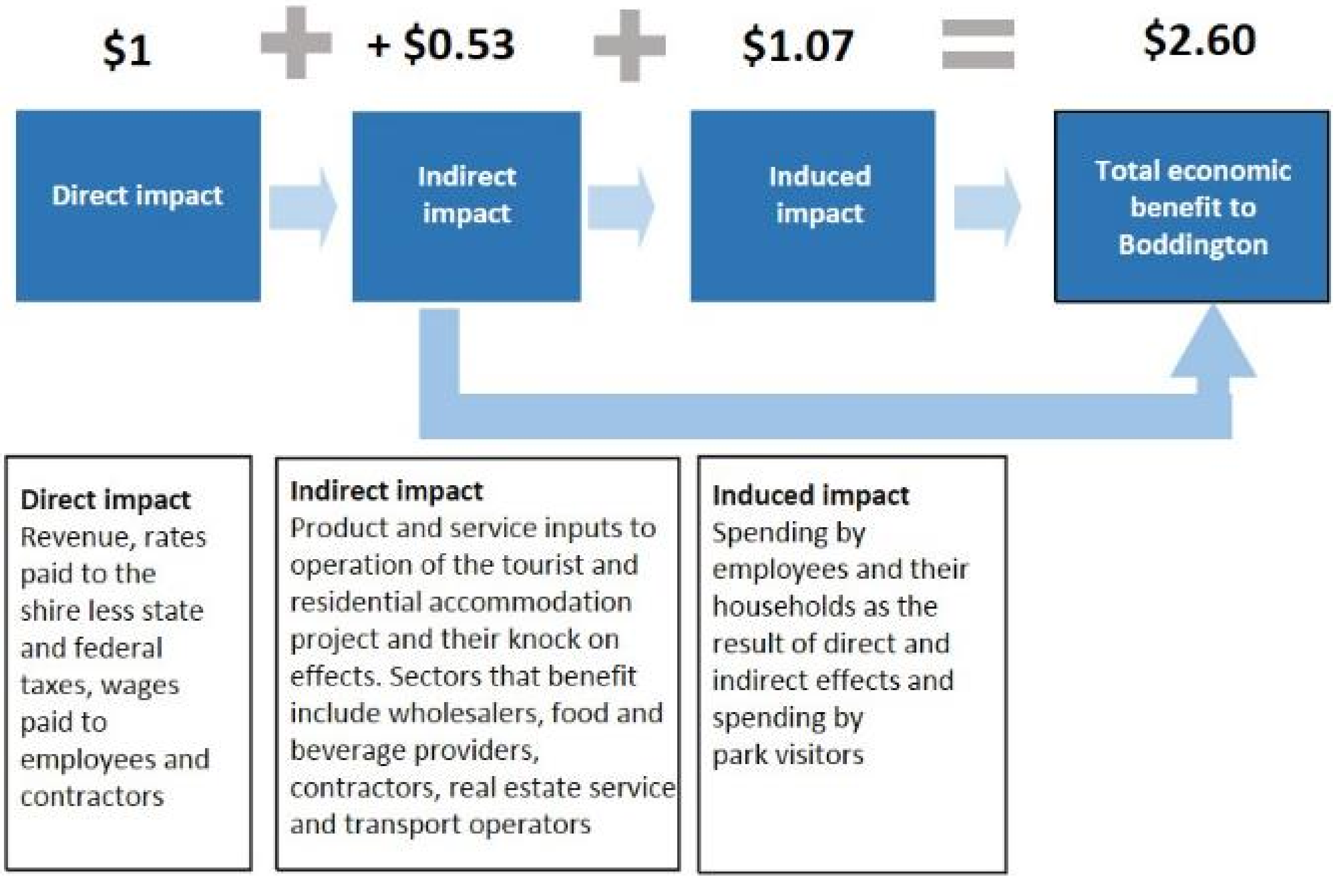
Economic Impact Flow - Construction



Using multipliers calculated for operational rather than construction expenditure, we can estimate the economic impact of the operations of the tourist accommodation components of the project to the Shire of Boddington. In this case we expect 80% of direct expenditure (direct output) will be retained within the shire in the form of accommodation revenue, labour, and household spending as a result of the local income. The resulting yield is higher. For each $1 spent on operations and additional $1.60 will be generated in indirect and induced impact and a total of $2.60 economic activity will be added to the Gross Regional Product (GRP) of the shire.

$1 spent on operations generates a total of $2.60 in total economic activity (i.e., GRP to the Shire)

Economic Impact Flow - Operations



Development costs for each of the project components are estimated to be $1.16 million

Estimate of development costs by item (Excludes government charges and headworks)

	Development Cost	Number of Sites	Extraneous costs (e.g. professional fees	Total Cost
Siteworks	$80,000	1	$25,000 (Design)	$75,000
Services infrastructure	$80,000	1	$50,000 (Design)	$130,000
Accommodation Units Cabins, Glamping Pods or Tiny Houses	$120,000	6	$90,000 (Transport)	$810,000
External Drainage	$30,000	1		$30,000
Guest Carpark	$50,000	1		$50,000
Landscaping	$20,000	1		$20,000
Services Connections	$8,000	6		$48,000
Total				**$1,163,000**

Source: Brighthouse

Total Social Impact

A summary of the impacts according to each factor is presented in the table below. The impacts are segregated into either the construction or operational phase of developing the project.

Social Impact Summary

Key Factor	Frame of Reference	Mechanism / Driver	Impact			
			Construction Phase	Operational Phase	Likelihood	Consequence
Work	Will the project provide financially or emotionally gainful opportunities for work?	Employment of local residents during the construction phase	Demand for construction based employment positions during the construction phase and subsequent improvements in local work travel distances	N/A	Possible	Minor
		Employment of local residents during the operational phase	N/A	Demand for tourism industry related employment positions	Likely	Moderate
Economic Resources	Will the project provide gainful opportunities for work?	Increased incomes with associated flow-on expenditure during construction	Increase in ability of residents to satisfy needs	N/A	Possible	Minor
		Increased incomes with associated flow-on expenditure during operations	N/A	Increase in ability of residents to satisfy needs	Likely	Moderate
Housing	Will the Project impact on the quality and availability of accommodation?	Increase in demand for rental residential dwellings during construction	Demand for short-term accommodation from construction workers	N/A	Possible	Minor
		Provision of short-term affordable accommodation options	N/A	Acts towards relieving prices	Likely	Major
		Provision of a limited number of longer-stay accommodation sites at the caravan park	N/A	Increase in security of accommodation	Likely	Major

Source: Brighthouse

The above social and economic assessment is confined to the proposed development of six tourist accommodation units and shire-owned freehold land adjacent to the existing caravan park. An economic benefit report for the existing caravan park operation was also undertaken utilising the Economic Benefit Calculator, constructed by BDO Economics, for the peak national body for the caravan industry, Caravan Industry Association of Australia.

The report estimated that the existing caravan park generated an additional economic income to the Boddington LGA of $517,154 per annum. The report is attached to this document as Appendix 1.

Note: The economic contribution from the free-camping site occupiers is not equal to those tourists that occupy sites in the caravan park or commercial accommodation. This is because there is no accommodation fee and the propensity of free campers to avoid provisioning in the town.

Recommendations

The following recommendations are provided to provoke discussion and provide potential directions for the further development of tourism in Boddington. They go well beyond the brief provided by the Shire to the Brighthouse Strategic Consulting, as the consultants considered that the development of additional tourist accommodation in Boddington would not be successful without the implementation of actions to introduce tourists to the town's attractions and events and build repeat visitation.

Construct tourist accommodation

Gap analysis of the current tourist accommodation in Boddington highlights shortcomings in the supply of comfortable, affordable, and relaxed resort-style, family accommodation. Most caravan parks provide tourist accommodation at their parks. The accommodation provides a valuable contribution to revenue and a good return on investment. Cabins now account for 20-25% of caravan park revenue across Australia, an increase of 10-12% on the situation a decade ago.

It is recommended that the Shire engage a consultant to prepare a concept design for appropriate tourist accommodation on Lot 18A and a site plan, floor plans and elevations. The consultant could also provide potential mitigation factors to justify development in the flood prone zone.

Raise tariffs at the Boddington Caravan Park

Increase current tariffs to be competitive with similar properties. This is aimed at creating additional revenue to provide an adequate financial return from the caravan park and to justify capital cost of developing the proposed new tourist accommodation. The current tariffs are considerably below comparative caravan parks and may raise questions of the Shire's competitive neutrality obligations to commercial accommodation providers in the town.

Utilise a portion of the increased revenue from raising caravan park tariffs to contribute to a marketing budget to promote the caravan park and the towns attractions and events.

Close the Free Camping Area on the Foreshore

The location of the free camping area so close to the Boddington Caravan Park is detrimental to the Boddington Caravan Park's occupancy and financial yield. It adds additional maintenance cost without contributing much to the community. The users of free camping sites also seek to reduce travel costs by shopping at discount supermarkets, fuel outlets and bottle shops in major centres, so do not support local business.

The rates proposed for sites the caravan park is not prohibitive to road travellers, including the free camping fraternity. They are a small cost when compared to the value of the free camper's caravan and tow vehicle or recreational vehicle. The community may question why it needs to contribute to the free campers' holiday budget.

The closure of the free camping sites, or their relocation to less prime location, would allow the site to be utilised for higher contributing tourist accommodation, such as backpacker rooms.

Develop a Backpacker Lodge on the River Foreshore

Construct a small backpacker lodge (4 – 6 rooms), in a purpose-designed single transportable unit with shower and toilet facilities on the land currently utilised for free-camping. This would help develop the backpacker market for Boddington and provide backpackers with appropriate accommodation for their needs.

Investigate the Development of two Iconic Tourist Attractions

In the Boddington Tourism Strategy, Part 1 Draft 2013, several iconic attractions were identified that would attract significant numbers of tourists to the town and maintain a high frequency of revisitation. The consultant team revisited the proposed attractions and selected two that are most relevant to the present time – A 4-wheel drive adventure park and training facility and a gold mining exhibitions and interpretation centre. The two attractions selected are even more relevant today than they were in 2013, due to:

- The exponential growth in the ownership and use of 4-wheel drive vehicles in the last decade; and
- The closure of the popular gold mine tours.

Gold Mining Exhibition Centre

The concept for a gold mining exhibition centre is in response to the alternative of physical mine tours of the Newmont Gold Mine in Boddington. The former mine tours were very popular and combined a tour of the Newmont Boddington Gold Mine and the Perth Mint. The tours creased with the advent of COVID-19 and indications are that the reopening is not supported by Newmont, due to safety concerns.

A much better option to the mine tours would be the development of a gold mining exhibition centre in the main street of Boddington perhaps at the current location of the Boddington Gold offices, which could be incorporated into the centre.

The centre would be architecturally designed, unique and provide a real ‘wow’ factor of a huge Haulpack vehicle, like those formerly used in the gold mine, pre autonomous drive vehicles, in the centre’s forecourt. The design would clearly distinguish the centre as a landmark in town such as is the case with the Shark Bay Interpretation centre.

Artist's impression, Boddington Gold Mining Exhibition Centre

The gold mining exhibition centre could include an interactive gold mining museum, with live demonstrations, audio visual of actual mining activities at the Boddington Gold mine, reference to Kalgoorlie's Super Pit, the Perth Mint, and the history of gold mining.

The Gold Mining Exhibition Centre would become an accessible knowledge-base for the gold mining industry in WA and would attract people interested in gold mining and mining history, tourist visitors to Perth and school groups.

4-Wheel Drive Adventure Park and Training Facility

Australians continue to gorge themselves on four-wheel-drive Sports Utility Vehicles (SUV) to holiday at home. According to the Federal Chamber of Automotive Industries SUV full year 2021 sales were at 531,700 vehicles, a 50.6 per cent market share of the new vehicle market. There are currently more than 5.5 million licensed 4-wheel drive vehicles in Australia, and it is estimated that 25-30% of owners are active off-road or gravel road driving enthusiasts.

More and more Australians are preparing to holiday at home next year, with the latest sales figures showing a continued surge in sales of four-wheel-drive wagons and utilities set up for both soft and hard-core off-road experiences.

Most SUV drivers act responsibly and do not cause damage to off-road tracks in forests and national parks. However, a small element of the SUV owners seek to incorporate high-risk thrills into their off-road adventures. These drivers often cause major damage to recreational off-road tracks by creating deep holes and trenches, which are other filled by rainwater or mud. Other damage to the recreational tracks includes placement of fallen logs and boulders which, together with the mud and water trenches. More passive SUV drivers create so-called 'chicken-track' diversions around the obstacles, which in turn damages the environment by encroachment into the bush.

In many parts of Australia, business entrepreneurs and 4-wheel drive clubs have developed 4WD Adventure Parks that have a range of tracks that test beginners and hard-core off-road adventurers alike. Users pay a fee to use the facilities for a day, or even camp overnight at the location and have an extended holiday doing what they enjoy.

Queensland leads the pack with at least six off-road adventure parks, including one of Australia's best – the Landcruiser Mountain Park at Kingatham, charging $60 per vehicle per night for overnight stays and $35 for day use. It has over 200km of off-road tracks. South Australia has two well-known parks, NSW three and NT and WA one. The WA adventure park is at White Gum Farm in York but is closed for the summer months.

The Boddington 4WD Adventure and Training Park

The concept is to develop a 4WD Park near Boddington. The Park would include a variety of 4WD trails, a training centre, picnic area and campgrounds.

The park would need be at least 80 acres with diversity in topography to ensure trails vary in difficulty to cater for all skills levels. In particular, the trails must include a number of challenges trails for more experienced drivers.

Visitors would use the trails to practice their 4WD techniques including vehicle recovery. Visitors would also be able to stay overnight in the park at a designated campground or independently. The campgrounds will be equipped with basic amenities including toilets, showers, and picnic facilities.

The Park would enable 4WD owners to share stories and experiences in a bush setting. A number of 4WD events could also be hosted at the park throughout the year.

A training centre would also be located within the park offering accredited 4WD courses. These courses would be run and operated by a registered training organisation. The range of courses could include:

- Operate and maintain a 4WD vehicle
- Drive AWD / 4WD vehicles on unsealed roads
- Drive and recover a 4WD vehicle
- Drive a 4WD in difficult terrain

The 4WD park would link in with 4WD tracks in the area. This may include the Captain Fawcett Commemorative 4x4 Trail that runs from Lane Poole Conservation Reserve, Dwellingup and finishes near Quindanning. This would provide a round-trip itinerary for weekend visitors from Perth.

The Shire of Boddington should consult with South 32 and Boddington Gold on the development of a 4WD Adventure Park. There may be benefits to both the mining companies and the community if a 4WD adventure park could be developed as part of the mine rehabilitation process.

Establish a Marketing and Promotional Campaign

Develop a marketing and promotional plan, targeting special interest groups and prospective visitors to key Boddington attractions and events.

Develop a 'one-stop' website for Boddington Tourism with links to the Shire website, and all relevant online tourism portals. Investigate SAAS options for online reservations of local tourist accommodation providers.

Engage an expert social media practitioner to place regular tourism marketing posts on all appropriate social platforms, join special interest groups e.g., WA Western/Rodeo Social Group (1,200,000 members), Skateboarding Perth & WA (2,500,000 members) and Quilting for Everyone (51,000 members) to build the Boddington tourism story over time and promote specific events and attractions. Seek community engagement on the social platforms to personalise the marketing message, through Shire facilitated social media educational classes.

Utilise the website, social media to build a database of tourist visitors and prospects and offer rewards (operator sponsored discounts) for best online reviews on Trip Advisor and other online traveller portals.

Next Steps

Establish a small project group consisting of Shire executive and an appointed expert consultant to:

a) Examine the viability of constructing tourist accommodation at the Lot 18A site and at the free-camping area, with a concept design and business case; and
b) Design a tourism and marketing and promotion plan and establish a budget for its implementation;
c) Work with the Peel Development Commission, Tourism WA and the mining industry to ascertain the level of support for the development of new, iconic tourism attractions in the Boddington LGA.

Appendices

Appendix 1

Economic Benefit Report, Boddington Caravan Park's current operations, Caravan Industry Australia, BDO Economics.

Appendix 2: Communication with Shire of Boddington project team, tourist accommodation operators and key stakeholders

Name	Title	Organisation
Julie Burton	CEO	Shire of Boddington
Roy Grieve	Executive Manager Planning & Development	Shire of Boddington
Jeff Atkins	Works and Services Manager	Shire of Boddington
Wendy Muir		Peel Development Commission
Monica Treasure	Corporate Affairs Specialist	South 32
John Dagostino	Manager - Sustainability and External Relations	Boddington Gold
Rod and Karen	Proprietor	Boddington Motel
Yvonne and Steve	Proprietor	Boddington Hotel
Sarah	Proprietor	Armoin
Dawn Newman	Proprietor	Woolpack BnB
Melanie Hardie	Proprietor	The Retreat
Rene Poupart	Caretaker	Boddington Caravan Park

All the accommodation providers on the above list were contacted and asked to provide their opinion on the situation concerning demand and supply of commercial accommodation in Boddington, whether they had plans to expand the number of accommodation units at their properties and if they were able to share their thoughts on the necessary actions required to improve visitation of tourists to Boddington. The consultants also conducted a site visit to all the accommodation properties.

The two mining company representatives were canvassed as to their organisation's usage of the town's commercial accommodation and if the supply was adequate or needed improvement. Future short-term accommodation requirements and preferences were also requested.

The consultants sought insights from the Shire and Peel Development Commission on future directions and needs.

The information received form those consulted was offered on the condition of confidentiality. However, the consultation was most helpful in informing the findings and recommendations of this report.

Appendix 3

Caravan Park Accommodation Report, Caravan Industry Australia, BDO Economics.

References

[1] 2021 ABS Census Data https://abs.gov.au/census/find-census-data/quickstats/2021/LGA50630

[2] 2016 ABS Census Data (2021 Census Data not yet available) https://abs.gov.au/census/find-census-data/quickstats/2016/LGA50630

[3] https://www.tourism.wa.gov.au/Markets-and-research/Latest-tourism-statistics/Pages/Visitor-statistics.aspx#/

[4] https://www.peel.wa.gov.au/our-region/

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[6] National Visitor Survey and International Visitor Survey - Direct Data Request (September 2022) – Tourism Research Australia. Data for Brookton - Murray - Narrogin - Wagin (SA2s). Data derived from Tourism Research Australia surveys are subject to sample error.

[7] https://trafficmap.mainroads.wa.gov.au/map

[8] https://www.peel.wa.gov.au/region-in-focus-boddington/

9 Glamping Market 2022, Allied Market Research https://www.alliedmarketresearch.com/glamping-market-A16856

10 IBIS World Report H4409 Caravan Parks, Holiday Houses and Other Accommodation in Australia

[11] Shire of Boddington Website

[12] Middleton, 1988:357