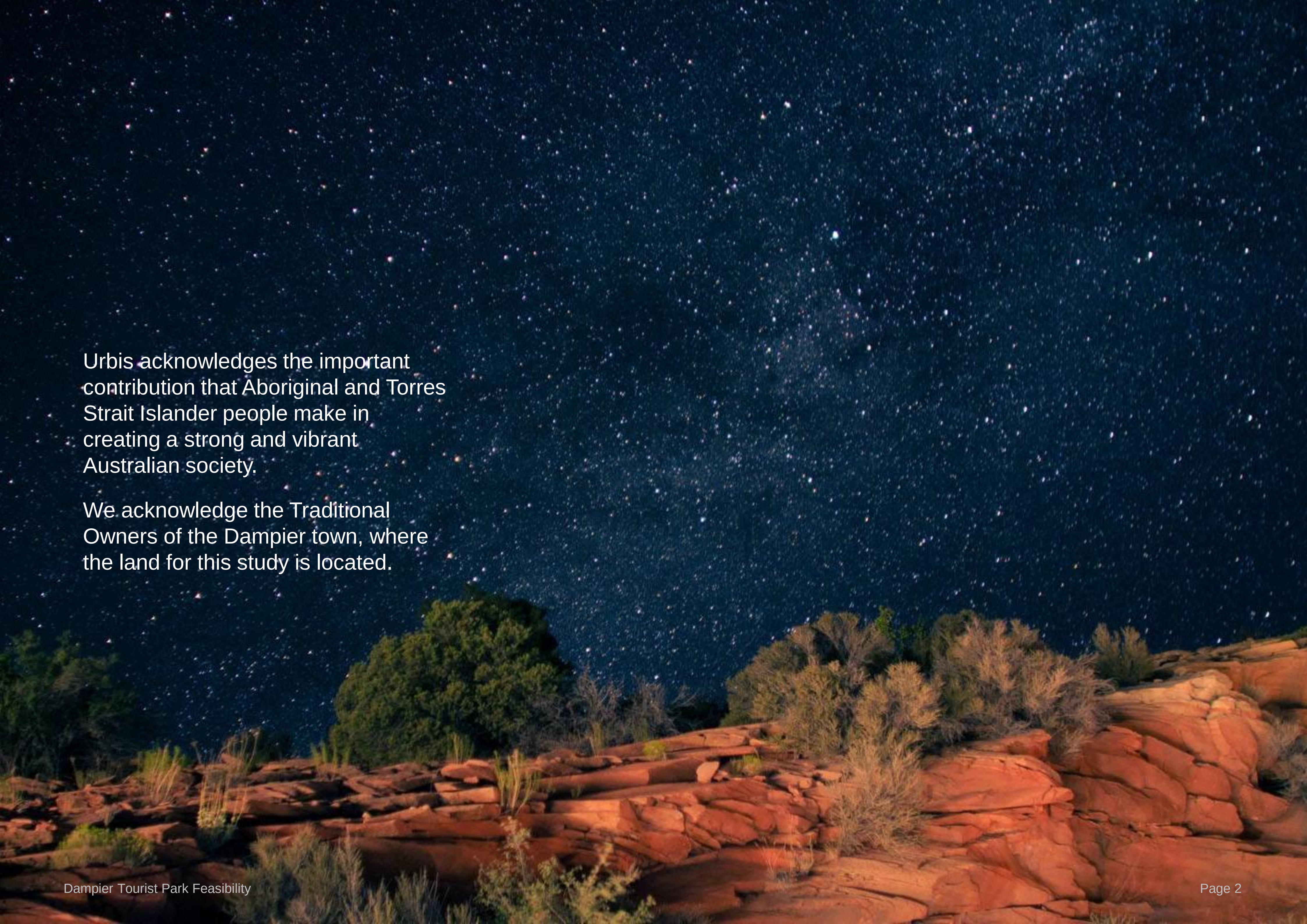
URBIS

DAMPIER TOURIST PARK FEASIBILITY

Report – Site Due Diligence and Development Options

Prepared for City of Karratha
April 2024



Urbis acknowledges the important contribution that Aboriginal and Torres Strait Islander people make in creating a strong and vibrant Australian society.

We acknowledge the Traditional Owners of the Dampier town, where the land for this study is located.

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EXECUTIVE SUMMARY

A tourist park in Dampier could provide a key first step in developing a small but thriving tourism economy for the town.

The City of Karratha are investigating the feasibility of developing a tourist park to cater primarily for people visiting the Dampier / Karratha area with caravans.

The proposed location of the tourist park is at 1, 5 and Lot 4 Haig Close, Dampier. The site is opposite the Dampier foreshore and within short walking distance of a range of amenities suitable for tourists.

KARRATHA AREA TOURIST MARKET

There is a well-established visitor market to the Karratha area with an annual average of over 340,000 visitor nights in the last decade. However, only around 22% of this is non-business related and only 12% is for the purpose of a holiday. The significant scale of the mining and construction industry in the Karratha area means these industries employ over 35% of City of Karratha residents. Within the Pilbara region mining and construction account for over 45% of employment. By contrast, tourism accounts for less than 3% of Pilbara employment.

The Pilbara region has a number of tourist attractions including Karajini National Park, the Red Dog Trail, water sports / recreation and Murujuga National Park, which is in the process of becoming a UNESCO World Heritage Listed area. Karratha / Dampier are located on the driving route between the tourist destinations of Exmouth and Broome. Karratha is a common stop-over for people travelling with caravans for extended periods of time due to the scale of the town and range of services that can be accessed. However, tourist accommodation including caravan parks cannot always be booked as the mining and construction industry often offer higher prices to book out accommodation in advance.

ACCOMMODATION NEED AND CHALLENGES

A conservative projection for tourist park demand in Dampier / Karratha area is in the order of around 260 additional accommodation spots (i.e. caravan bays or cabins) over the next decade to 2033. Some of this demand can be met through the development of the subject site.

These projections have been based on factors including the historical growth in the Dampier / Karratha area and Tourism Research Australia expectations for Western Australia.

However, given the relatively immature tourism market in Dampier compared to nearby destinations and the potential of Murujuga National Park there is potentially significantly more demand for accommodation than the conservative assumptions indicate.

SITE OPPORTUNITIES

Key attributes for the developing a tourist park on the subject site are noted below.

- **Ocean views / proximity** – opposite the beach, natural landscape features.
- **In the community centre of Dampier** – less than 5 mins walk to dining, recreation and retail destinations.
- **Retain attractive site features** - some vegetation and landscaping can be retained, such as mature trees, BBQ / fire pit area.
- **Limited competition in Dampier** – the only other tourist park is for transit purposes and limited to 3-day stays.

EXECUTIVE SUMMARY...

SITE CHALLENGES

Key challenges for the subject site are noted below.

- **Rocky, many levels from built and natural topography** – some challenges for design and optimising yield / limiting development costs.
- **Easements** – what can be built and where within the site.
- **Geotech** – cost of leveling sites where rock is present potentially very high.
- **Size** – small site will limit the yield despite the attractive location.
- **Operational considerations** – low yield of caravan / cabin spots, seasonal market means the design and operation will need to run with minimal staffing and on-going costs to be feasible.

The majority of these challenges are expected to be dealt with through careful site design.

SITE OPTIONS

Two options for development of the subject site have been scoped. They are summarised below.

- **Option 1** – develop the tourist park in two stages to minimise the initial costs and risks associated with need to market and staff a new tourism operation.
  - Stage 1 – develop the whole site for 33 caravan bays / camping, with the minimum shared amenities required.
  - Stage 2 – convert 10 of the caravan / camping spots for cabins and 3 for caretaker housing.
- **Option 2** – develop the tourist park in a single stage to the same design.

The total yield for both stages is:

- 33 caravan bays
- 10 cabins
- Management residence/s

FEASIBILITY

Significant initial capital costs to construct the proposed options are a prohibitive constraint. This was established in the costing and viability testing assessments. As a result, both options have been evaluated as unviable from a financial standpoint.

Economic benefits have been estimated for the site options, revealing considerable positive impact from expanding visitor nights and employment in Dampier / Karratha area. To reap these benefits, however, the initial development cost must be overcome, which would require significant intervention.

INTRODUCTION

BACKGROUND

The town of Dampier is located around 20 km west of Karratha on the coast of the Burrup Peninsula / Murujuga within the Dampier Archipelago.

A masterplan for the town was presented to the local community for feedback in March-May 2021. Some concerns were raised about the proposed tourist park size and location within the masterplan. In response the City of Karratha engaged consultants to explore alternative locations and identify a preferred site. The preferred site is the Tennis Courts site, currently hosting a tennis and squash club. The intention is to move these land uses to Hampton Oval.

Before a decision is made to move the existing land uses the City require an understanding of the following.

- Is a tourist park feasible on the site?
- If it is feasible, how should it be developed and managed?

Urbis was engaged to undertake analysis to answer these questions.

REPORT STRUCTURE

This report is structured as follows.

- **Site Due Diligence**: Capability of the site to be used for a tourist park in terms of existing services, barriers / encumbrances, and topography.
- **Development Options**: Analysis of established, rental and short stay accommodation trends, attributes and market gaps.
- **Cost Benefit Analysis**: Identification of key tourism accommodation market opportunities.
- **Transport and Transportation Plan**: Assessment, comparison and ranking of identified site options suitable for the identified market opportunity.

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SITE DUE DILIGENCE

KEY INSIGHTS

1. **Ocean views, small town vibe.** Dampier town offers location attraction factors that have not and cannot be replicated in Karratha. These are expected to be highly attractive to visitors who in turn are likely to contribute positively to the local economy.

2. **Amenities close by means lower cost to develop and maintain.** The subject site at Haig Close is very well-located within a few minutes walk of amenities including the beach, playgrounds, food/beverage retail, and Hampton Oval. This means the range of amenities that need to be provided within a tourist park are minimal.

3. **Site challenges require careful design response.** The subject site topography, shape, existing built features and presence of service easements present some cost challenges in developing a tourist park which requires significant areas of flat ground for parking caravans.

4. **Site features can be leveraged to become assets.** The topography and existing landscaping can be incorporated into the tourist park design to provide ocean views, shady common areas and a unique sense of place that are expected to be highly attractive to park visitors.

SITE DUE DILIGENCE | DAMPIER TOURISM CONTEXT

KEY TOURISM DRIVERS & DRAWCARDS

A REGIONAL HUB

There are two factors that make Dampier/Karratha a regional hub for Australia’s Northwest. Firstly, its status as the coastal gateway city to the world renowned Karijini National Park, located ~4.5 hours south east of Karratha. Karratha is also strategically located as the largest mid-point city/town in between Exmouth and Broome, making it a key stopover city for the many travelers taking this popular road-trip route, including grey nomads, family road-trips and backpackers.

LOCAL ATTRACTIONS

The Dampier/Karratha region is home to the coral-rich Dampier Archipelago, providing an abundance of marine life and marine-related activities across the 42 islands.

The Murujuga National Park is a unique attraction with human art dating back 47,000 years. Described by Lonely Planet as ‘home to the world's largest concentration of rock art’, this iconic national park is located 30 minutes north of Dampier making it an important driver of visitation to the Dampier/Karratha area. With a process underway to make this a UNESCO World Heritage Area, the potential increase in awareness should bring in greater visitor demand for the Dampier and Karratha areas.

Other key attractions include Miaree Pool, a highly rated swimming hole along Maitland River centred around the Australian outback approximately 30 minutes south of Dampier. Gnoorea Point/40 Mile Beach is a day-trip for those in Karratha/Dampier, situated 40km south of Karratha. Another notable attraction is the Hearson Cove, a shallow pebble beach and viewing spot for the Staircase to the Moon phenomenon from March to November just 11 minutes northeast of Dampier.

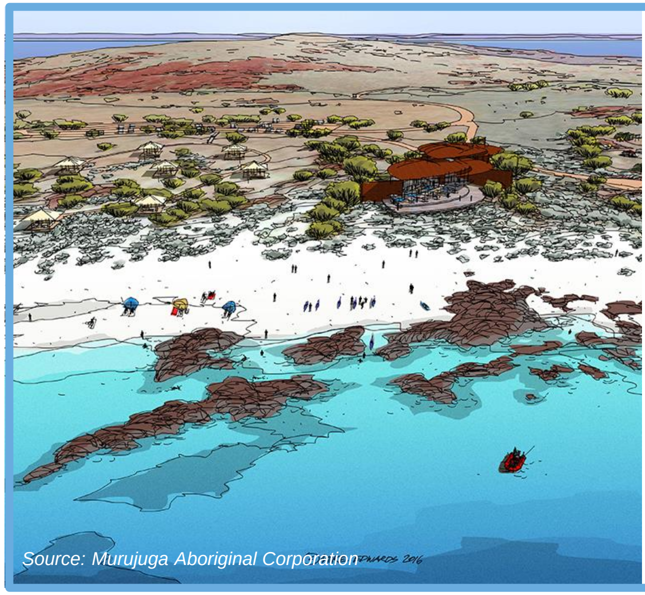
DAMPIER ARCHIPELAGO / MURUJUGA

Already a listed National Heritage Place, the Dampier Archipelago / Murujuga has been nominated as a Tentative List Submission for the UNESCO World Heritage List. It is home to an extensive and diverse collection of rock art which has deep cultural and spiritual meaning to the Traditional Owners, linking their stories, customs and knowledge to the land.

World Heritage places are recognised internationally for their importance of place, and require a strong commitment for local, State and the Commonwealth governments to protect and promote them. In Australia World Heritage places can generate economic opportunities for the surrounding area and can be an important tourist attraction. The status of Murujuga as a World Heritage Place is currently awaiting assessment. Regardless, it is already recognised as a nationally significant heritage place.

Source: Department of Biodiversity, Conservation and Attractions

Source: Murujuga Aboriginal Corporation



Source: Murujuga Aboriginal Corporation

MURUJUGA LANDS

The Murujuga Aboriginal Corporation (MAC) hold freehold title to the Murujuga National Park in the Dampier Archipelago. There are some walking trails and tourism infrastructure for day visitors to the park. Some parts can be accessed by car and the islands can be accessed by boat.

The MAC are planning a new indigenous tourism offer at Conzinc Bay in the Burrup Peninsula. This is expected to offer a jetty for international cruise ships to access the area, and a day visitor centre offering a variety of experiences provided by the Traditional Custodians of the area and guided tours.

Source: Murujuga Aboriginal Corporation

Source: Murujuga Aboriginal Corporation

SITE DUE DILIGENCE | TENNIS COURTS SITE CONTEXT

SITE OVERVIEW

The tennis courts site at 1, 5 and Lot 4 Haig Close is located in the north-west of the town of Dampier, across the road from the recently redeveloped Dampier foreshore and with views to the ocean from the majority of the site.

The site is well-located in terms of views and within a short walk to a range of amenities and local businesses that could benefit from a tourist park. These include:

- **Soak Café –** adjacent to site, with potential to provide an access gate from the site
- **Dampier Chinese Restaurant –** adjacent to site, south of Church Rd (1 min walk)
- **Dampier Foreshore –** opposite site (1 min walk)
- **Lawn Bowls Club –** opposite site (1 min walk)
- **Hampton Oval –** opposite site (1 min walk)
- **Foreshore and Adventure Playgrounds –** opposite site (1-2 min walk)
- **Yacht Club –** 300m north of site (4 min walk)
- **Primary School –** 300m east of site (4 min walk)
- **Dampier Mermaid Hotel –** 1km north of site (14 min walk), potential future closer access
- **Village Centre (Shopping Centre) –** 750m along Church Rd (11 min walk)
- **Hampton Harbour –** 300m north along The Esplanade (4 min walk)

SITE DUE DILIGENCE | TENNIS COURTS SITE - MASTERPLAN

The tennis courts site is currently being used to accommodate a tennis club and squash club.

The Dampier master plan identified the site as a potential location for a new tourist park, with the tennis courts and squash club having potential to be relocated to Windy Ridge Oval.

The concept in the original masterplan provided a potential layout. This study considers the site constraints and opportunities in more detail.

Choice of accommodation (3 x 1)

Communal Tourist Park Facilities

Site Amenities

LEGEND

- Site Boundary
- 24 Caravan Site / Tent Site Allotments
- 4 Chalet Site Accommodation (2 bedroom x 1 bathroom)
- 14 Chalet Site Accommodation (3 bedroom x 1 bathroom)

1. Chalet tourist accommodation adjacent Haig Close. 9 three bedroom chalet sites provided
2. 24 caravan/tent allotments provided
   - Additional Chalets could also be considered in this location
3. Retention of existing vegetation between The Esplanade and proposed chalets
4. Chalet tourist accommodation wrapping around The Esplanade with views to Town Beach. 8 chalet sites provided with a combination of two and three bedroom accommodation choices
5. Tourist Park communal facilities and ablution
6. Consolidated recreational area provided integrating and sympathetic to existing topography. Opportunity to include children's playground area
7. Tourist Park entry, check-in and administration facilities
8. Utilisation of Haig Close for entrance/egress of services and Tourist Park operation

NOTE:
All concepts assume the land is capable and suitable for a tourist park especially with respect to safety, health, and access to services.

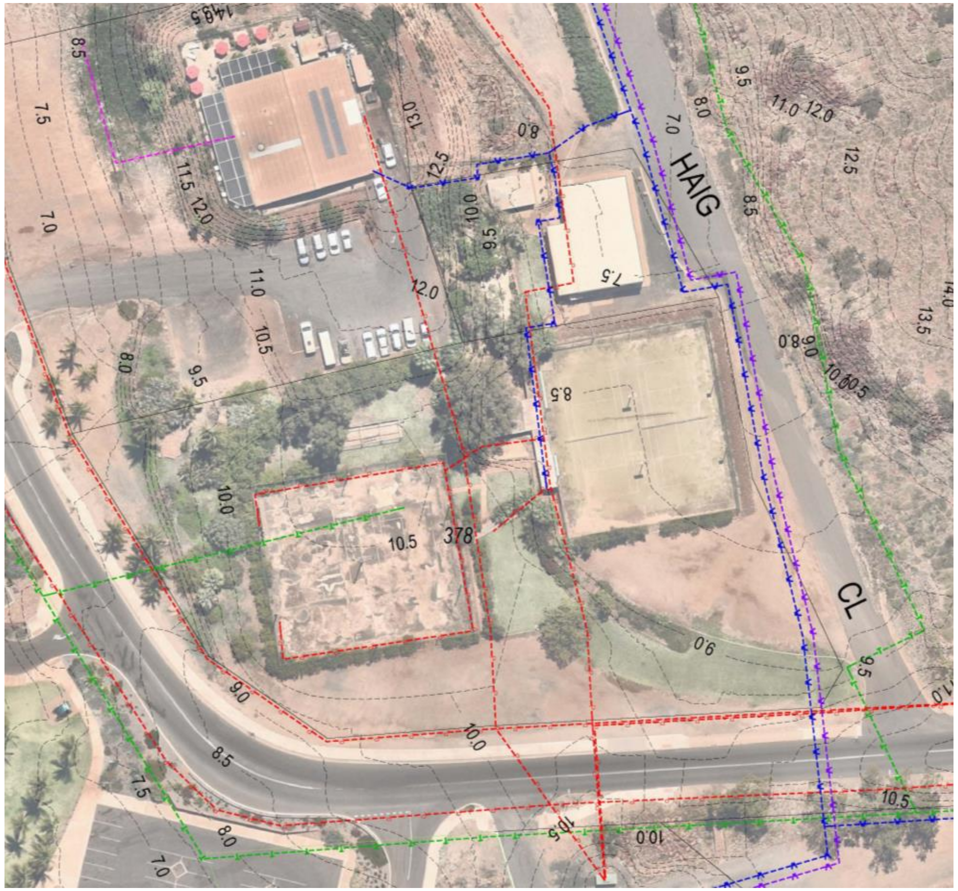
SITE DUE DILIGENCE | SITE CONDITIONS

TOPOGRAPHY

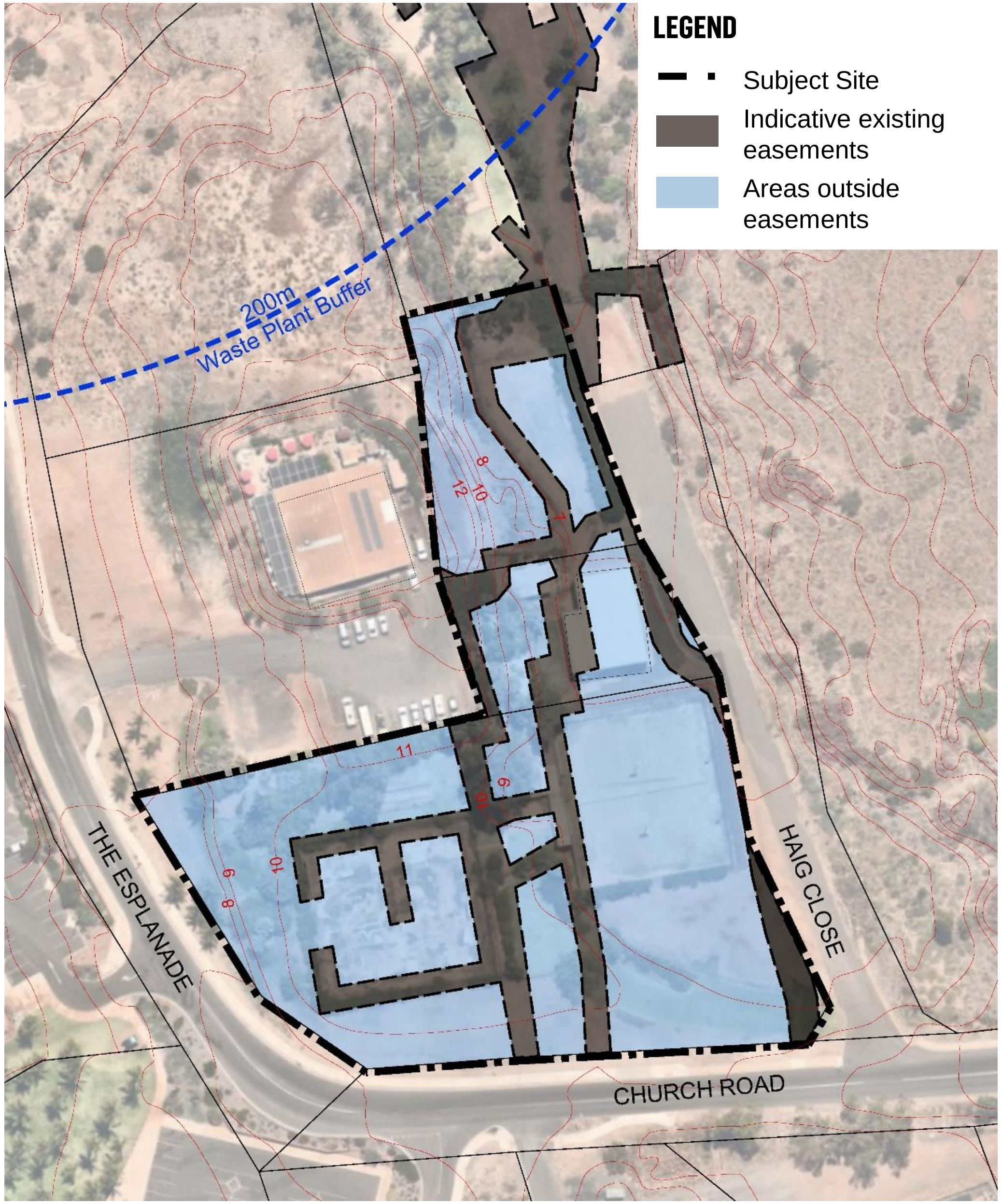
- Significant slope along the western boundary against the adjacent site will limit developability of this portion.
- The site's elevation along The Esplanade provides a potential premium view to the water.

EASEMENTS

- Multiple easements on site will limit developability for permanent structures.
- Opportunity for relocation of some power easements as site is developed.



Existing Site Services



Current Site Conditions

SITE DUE DILIGENCE | SERVICING INVESTIGATIONS SUMMARY

SERVICE	COMMENT
Site conditions	▪ Geological mapping suggests predominantly igneous rock inland with (likely) calcareous dune sands near the coast. ▪ Site expected to have a highly variable sandy/clayey soil cover over rock (maybe 0.5 m – 2 m thick). ▪ Rock outcropping on east boundary of the site. ▪ Land grades from RL 11.0 m in the south east corner to RL 8.0 in the north west corner. ▪ Site is terraced to accommodate the current development.
Roads and paths	▪ Church Rd / The Esplanade services the south and western boundaries of the site. ▪ Church Road is 7 m wide sealed with partial kerbing. ▪ Haig Cl services the eastern boundary of the site. ▪ Haig Cl has a 6.5 m width, sealed and unkerbed. ▪ 2 m wide concrete path on the north side of Church Rd.
Drainage	▪ Church Rd / The Esplanade drainage is partially collected by kerbs and is directed to discharge to the foreshore parking area. ▪ No drainage pits on Church Rd for the section fronting the existing development. ▪ Open channel drainage diversion from the north side of Church Rd along the eastern side of Haig Cl. ▪ No pipe drainage system is evident on the site.
Sewer	▪ Wastewater system is owned and operated by RTIO. ▪ RTIO have advised the town WWTW has adequate capacity to cater for an estimated flow of 25 kl/day. ▪ Sewer treatment plant has an odour buffer, but this is not expected to cause issues which would prevent development of the site. ▪ It has been recommended to reduce the buffer from 500 m to 200 m. ▪ A new sewer would be required to connect the proposed development to the WWTP inlet - this would be at developer cost and may be a gravity or pressure main as grades may dictate. ▪ Easements protect existing infrastructure. ▪ 6 m wide easements would be required to protect any new or relocated infrastructure.

SERVICE	COMMENT
Sewer cont.	▪ New or relocated services should not be under tarmac or other hard / sealed surfaces and would require 24/7 access for maintenance. ▪ RTIO advise that a dedicated wastewater dump point which is not connected to the sewer would be required at the development site.
Water	▪ Water supply system owned and operated by RTIO. ▪ RTIO high level review of modelling indicates that localised water main upgrade may be required to cater for the increased capacity, as the existing 100 mm main is unlikely to have sufficient capacity based on the provided estimated demand of 25 kL/day (equivalent 84 EP). ▪ Easements protect existing infrastructure. ▪ 6 m easements would be required to protect any new or relocated infrastructure. ▪ New or relocated services should not be under tarmac or other hard/ sealed surfaces and would require 24/7 access for maintenance.
Power	▪ Power system owned and operated by RTIO. ▪ RTIO advice is that the existing system will not have capacity for the additional loads and will require a major upgrade with new substation. ▪ RTIO advise that a very high-level estimate for upgrade of the system is $1,750,000, subject to full design and costing review being completed. ▪ The lead time for the required assets for the upgrade and installation is approx. 52 weeks. ▪ Easements protect existing infrastructure. ▪ 6 m easements would be required to protect any new or relocated infrastructure. ▪ New or relocated services should not be under tarmac or other hard/ sealed surfaces and would require 24/7 access for maintenance.
Telstra	▪ Telstra / NBN services front the site. ▪ Capacity of the system is unknown.

Key Findings

Site suitability:

- ‘A’ or ‘D’ land use under the current local planning scheme.

Key risks:

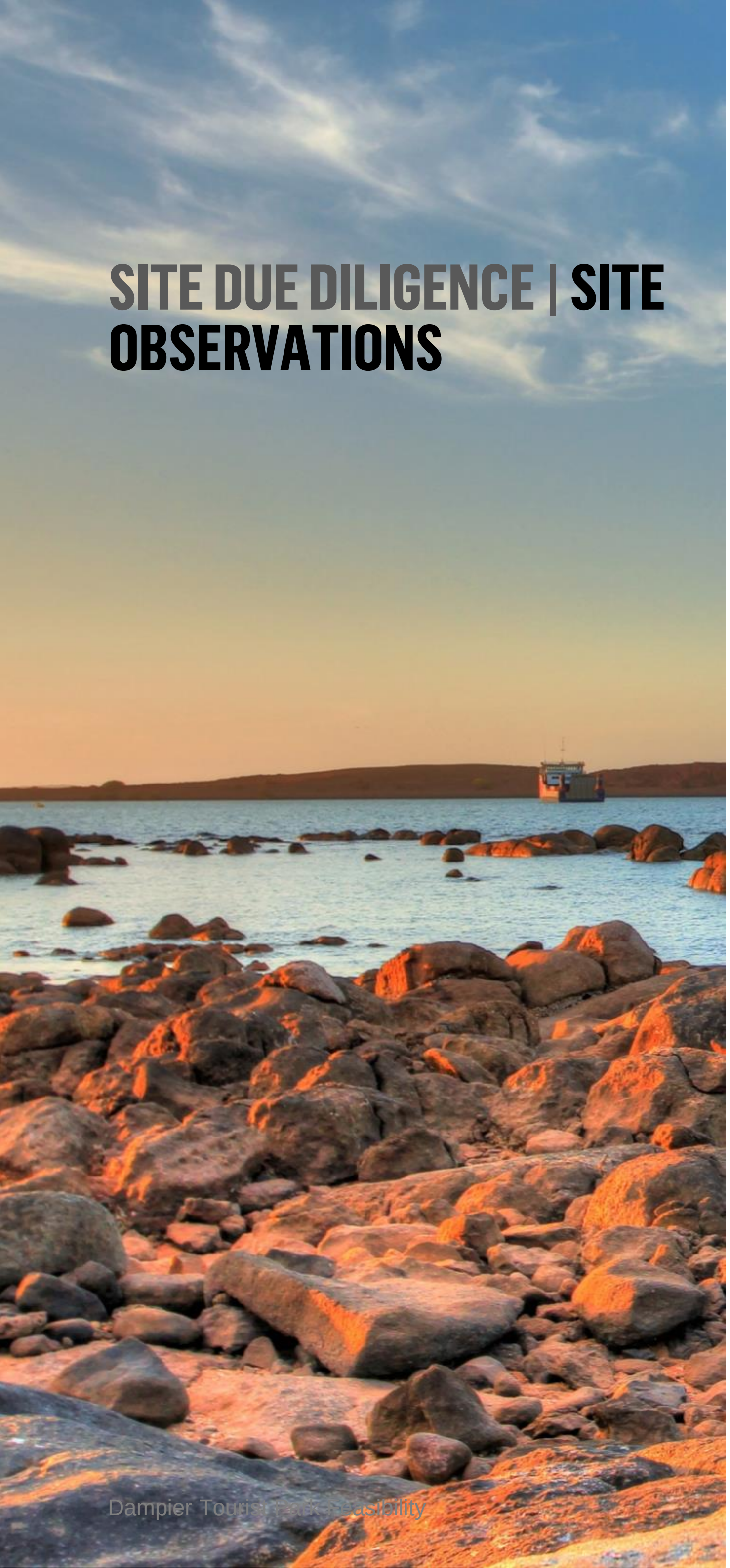
- Potential for coastal storm surge over part of the site.

Further investigation required:

- Environmental (vegetation and fauna);
- Cultural heritage; and
- Traffic.

Key Planning Considerations

CRITERIA	COMMENT
Address/s	Lot 1, 5 and Lot 4 Haig Close, Dampier
Size	1.165 ha
Tenure	100% - Hamersley Iron Pty Ltd (Rio Tinto) – will be transferred to the City of Karratha
Zoning / policy controls	Zoned ‘Town Centre’ under City of Karratha Local Planning Scheme Subject to Local Planning Policy 9 – Town Centre Zone Development Requirements. LPP9 outlines development standards and requirements for any development within the Town Centre Zone. **Caravan Park** and **Workforce Accommodation** are ‘A’ land uses - not permitted unless the local government has granted development approval after giving notice in accordance with clause 64 of the deemed provisions. **Caretaker’s dwelling, hotel, motel, short stay accommodation** and **tourist resort** are ‘D’ land uses - not permitted unless the local government has granted development approval.
Site cover	Maximum Site Cover of 70% Maximum Plot Ratio of 2.0
Topography	The site is relatively flat, with a slight slope from the north east corner to the south west corner of the site.
Coastal risks	Moderate Coastal Risk – 500 Year Storm Surge Levels >6 m AHD
Environmental considerations	To be investigated as a future stage of this study
Cultural considerations	Needs investigation Aboriginal Cultural Heritage - Historic Place No. 23323 - Burrup Peninsula, Murujuga
Traffic considerations	To be investigated as a future stage of this study
Community considerations	Providing alternative location for existing community sporting clubs Minimising visual impact on the landscape



SITE DUE DILIGENCE | SITE OBSERVATIONS

LOCATION

- **Ocean views / proximity** – opposite the beach
- **In the community centre of Dampier** – less than 5 mins walk to Hampton Oval and community amenities, Dampier Foreshore Playground, Adventure Climbing Playground, dog beach, dining / takeaway food retail, Dampier bowling club, and convenience store. Less than 10 mins walk to Dampier town centre offering cafes, small supermarket / liquor retail, pharmacy, Dampier community centre and landscaped community hub.

TOPOGRAPHY

- **Rocky, many levels from built and natural topography** – some challenges for design and optimising yield / limiting development costs

KEY OPPORTUNITIES

- **Retain attractive site features** – some vegetation and landscaping can be retained, such as mature trees, BBQ / fire pit area
- **Views** – cabins / caravan spots can be oriented to enable ocean / foreshore views, other spots can be oriented to provide views of natural landscape features, existing landscaping and Jurat Park.
- **Shelter from wind** – existing retaining walls on site and adjoining the site can provide shelter from the prevailing wind for some parts of the site, including the existing common area for the squash club.
- **Economic and social benefits** – developing a tourist accommodation offering that can be used only by tourists will provide stability needed to develop a local tourism industry, and tourists will provide additional expenditure for local businesses.

KEY CONSTRAINTS

- **Easements** – what can be built and where within the site.
- **Geotech** – cost of leveling sites where rock is present potentially very high.
- **Size** – small site will limit the yield despite the attractive location.
- **Operational considerations** – low yield of caravan / cabin spots, seasonal market means the design and operation will need to run with minimal staffing and on-going costs to be feasible.

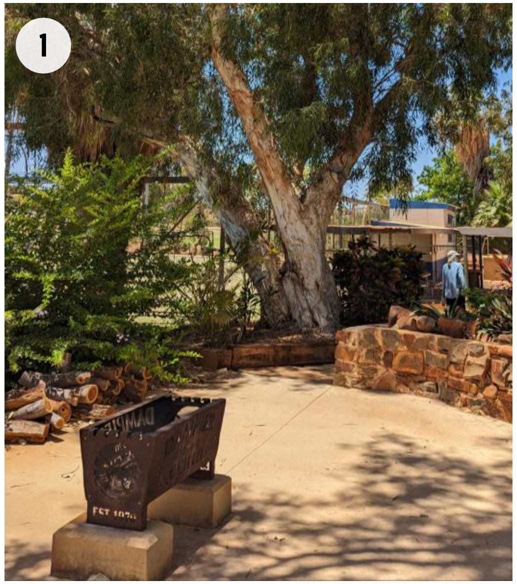
COMPETITION NEARBY

- **Karratha tourist parks** – high amenities, easier access to goods and services in Karratha.
- **Point Samson tourist parks** – less than 1 hr drive from Karratha, existing amenities, established reputation.

SITE VISIT

KEY FEATURES

1. **Fire pit** – opportunity to retain.
2. **Squash Club Room** – potential to be repurposed can be investigated as part of detailed site design
3. **Landscaped Retaining Walls** – effective wind shelter, however costly if needed to be levelled.
4. **Barbecue Area** – opportunity to retain.



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VISITOR PROFILE

KEY INSIGHTS

1. **Mining economy, not tourist economy.** Around 78% of visitors to Dampier / Karratha are travelling for business. The remaining people who travel for holidays, to visit friends/family or for other reasons are the most likely to stay in a tourist park.

2. **Tourist parks small segment of accommodation available.** Between 2013 – 2023 an average of around 22% of non-business visitors stayed in caravan / camping parks in the Karratha area. This amounted to 81,406 annual visitor nights from the Year-to-March 2013 to the Year-to-March 2023.

3. **Increasing visitation to tourist parks.** Over the last decade there has been a sustained trend of increasing visitation to caravan / camping parks, although the numbers from year to year can be highly variable, typically due to seasonal factors.

4. **Highly variable international market for non-business visitors.** 40% of the international visitors who came to the Karratha area in the last decade came for non-business reasons, and on average 22% were on holiday.

5. **WA is the key market within Australia.** On average from 2013 – 2023, 84% of non-business domestic visitors to Karratha area were from within the State.

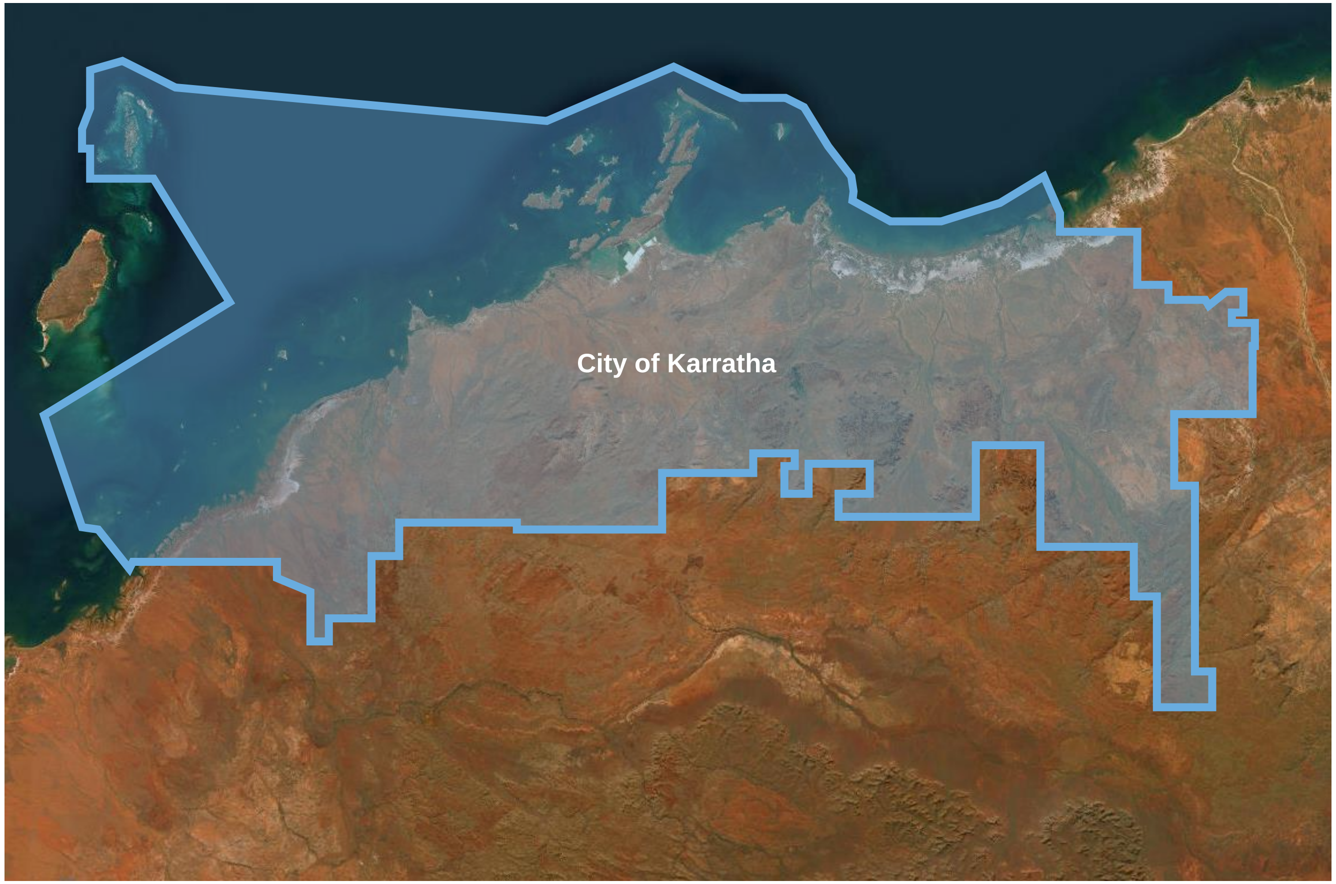
6. **Very short or very long visits were most common.** Nearly 80% of holiday visitors stayed 1-3 nights or 15+ nights.

Study Area

The City of Karratha, combining the Karratha and Roebourne SA2s has been used as the study area to assess the visitor market and undertake the demand assessment for the Dampier.

This area includes the towns of Dampier, Roebourne, Point Samson, Wickham, and the City of Karratha.

City of Karratha

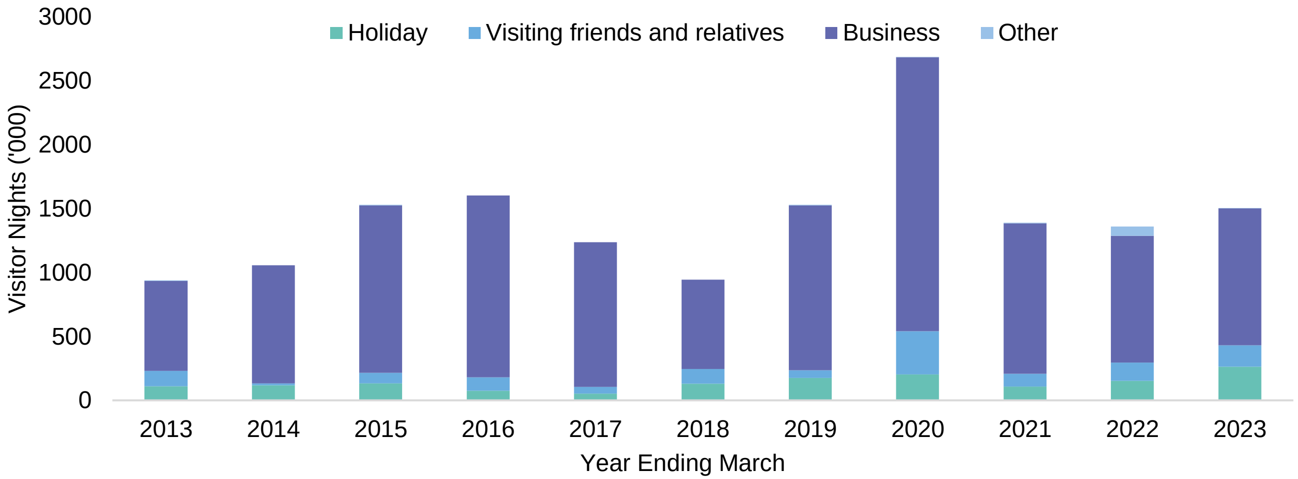


Key Findings

There are a notable number of patterns for the visitor market noted below.

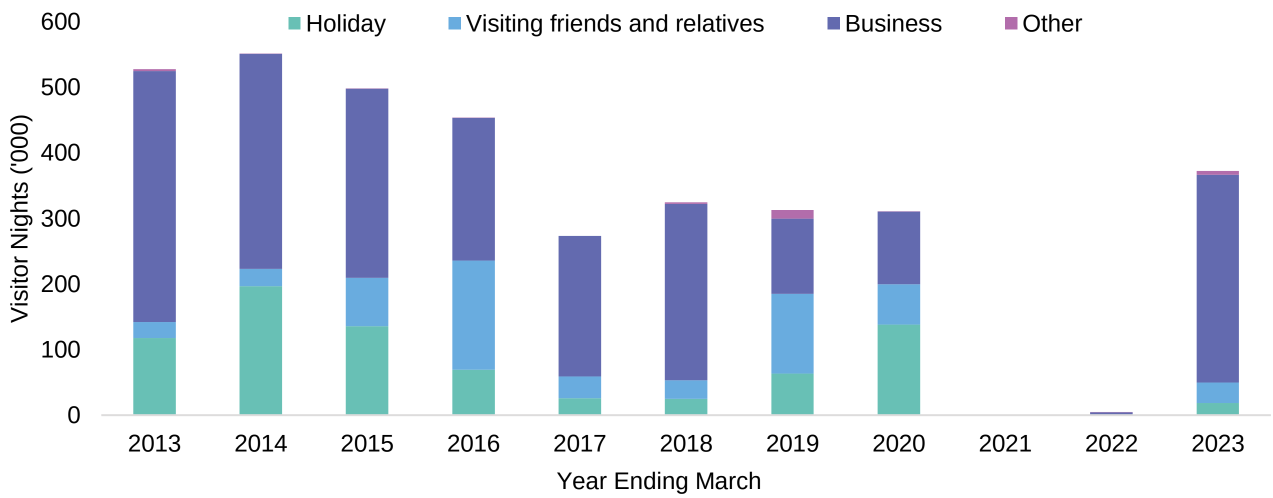
- Business related visits are a significant driver of visitation to the region, especially in the domestic market. In 2020, Karratha experienced a significant surge in business visitor nights, driven by its prominence as a mining hub and factors such escalating iron ore and commodity prices, among others, which amplified mining activities.
- From 2013 to 2023, domestic non-business visitation averaged 265,000 visitor nights annually, whereas international visitation averaged 125,000, more than double the domestic rate.
- In terms of holiday visitation, the domestic market has remained largely low and stable but a clear upward trend was noticed in the international market in the pre-pandemic years from March 2017 to 2020.
- VFR (Visiting family and relatives) related visits have been largely stable across both markets but tend to be slightly higher in the international segment that the domestic one.
- Those visiting for regions other than the above have remained negligible across both markets.

Domestic Visitor Nights by Purpose, Roebourne & Karratha SA2, 2013-23



** Other includes visiting for reasons such as medical, education, providing transport, attending a funeral and other undisclosed reasons.*
Source: Tourism Research Australia

International Visitor Nights by Purpose, Roebourne & Karratha SA2, 2013-23



** Other includes visiting for reasons such as medical, education, providing transport, attending a funeral and other undisclosed reasons.*
Source: Tourism Research Australia

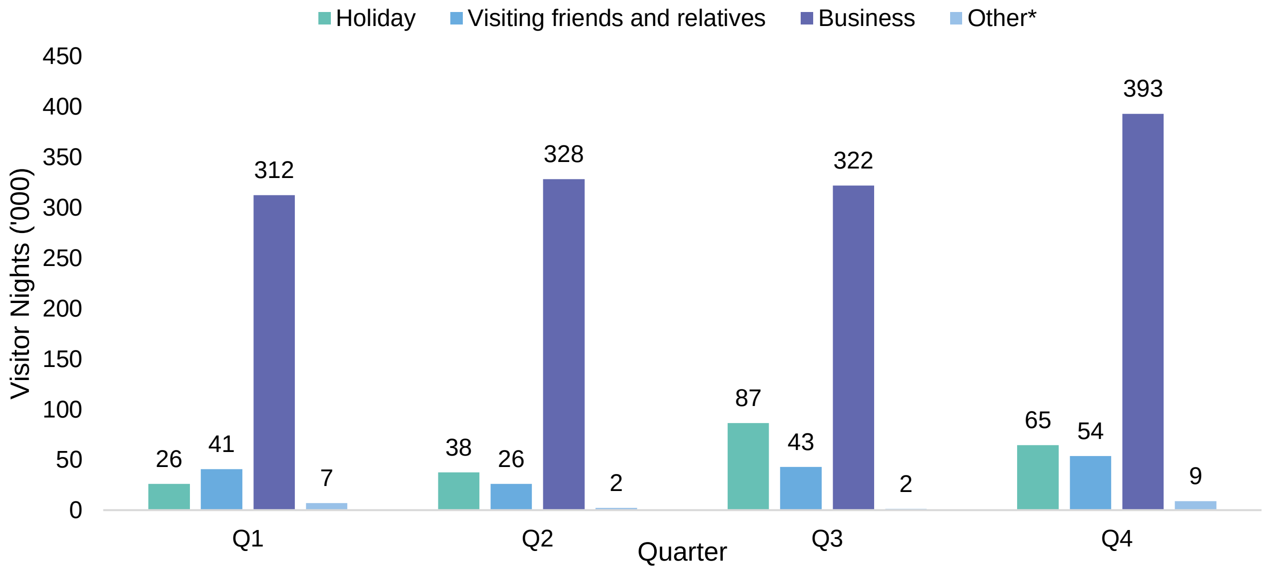
Key Findings

Based on the adjacent chart, we note that:

- Regardless of seasonality observed throughout a typical year, the majority of visitation is driven by business and employment related purposes, with a notable peak being evidenced in Q4;
- Non-business visitation averages about 33,000 nights per quarter annually, significantly lower than the 340,000 nights for business-related stays; and
- A slight peak in holiday related visits is evidenced in the region during Q3.

It is evident that within a typical year, business visitation drives the tourist market in this region. If fact, non-business visitation comprises less than 22% of the of the total visitation.

Visitor Nights by Quarter, Roebourne & Karratha SA2s, 2013-23 (Average)



** Other includes visiting for reasons such as medical, education, providing transport, attending a funeral and other undisclosed reasons.*
Source: Tourism Research Australia

Non-Business Visitation, Roebourne & Karratha SA2s, 2013-23 (Average)

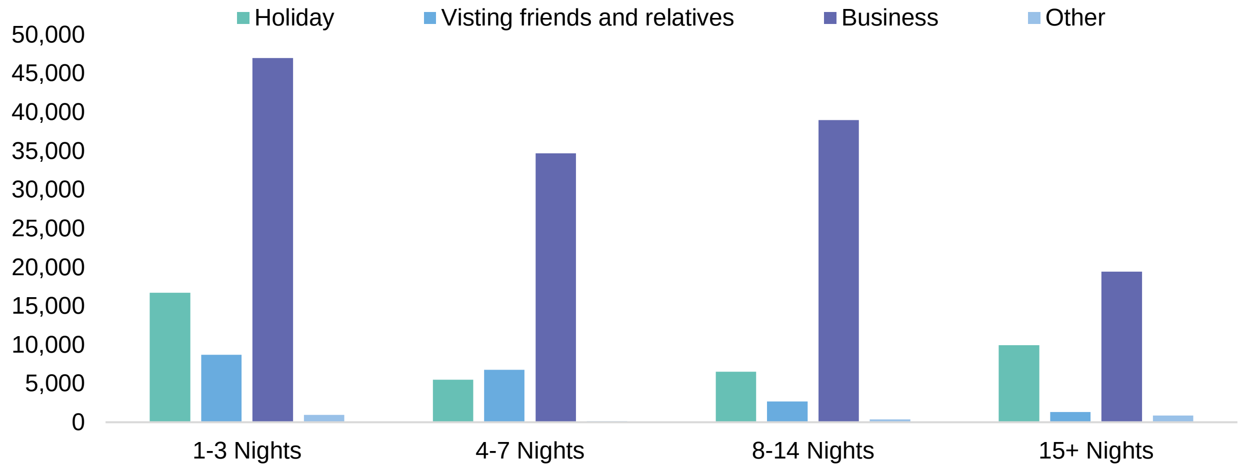
Source: Tourism Research Australia

Key Insights

Based on a 10-year average to March 2023, we observed the following.

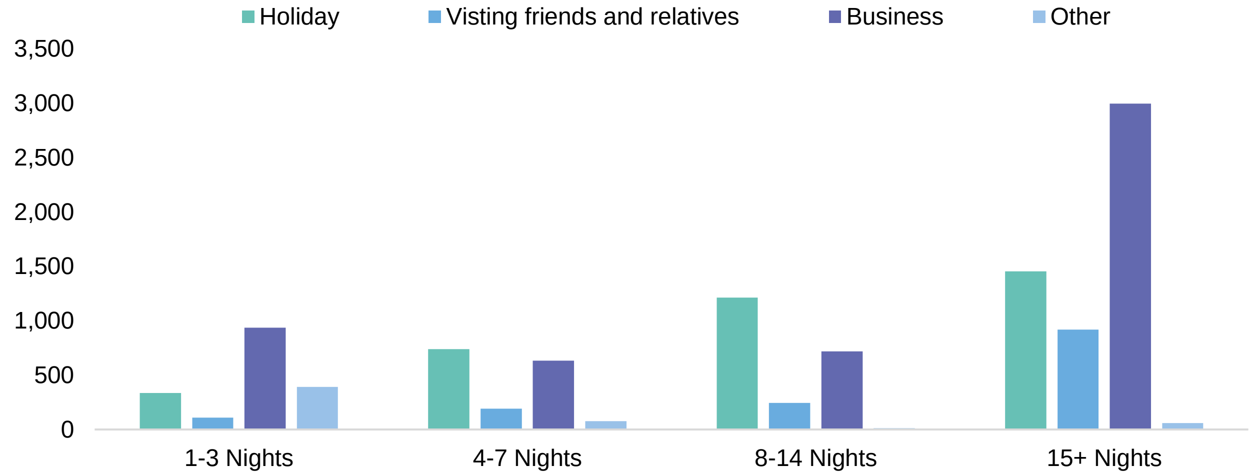
- The majority of domestic visitors in Roebourne & Karratha SA2s, especially those visiting for holidays and business reasons, have shorter stays of 1-3 nights. A relatively minimal number of domestic holiday visitors stay for longer periods, highlighting the potential prominence for the region being a short-term getaway.
- However, it is notable that across both domestic and international markets, business visitors tend to stay longer compared to those on holidays. For domestic visitors, it is not uncommon to stay between 8-14 nights whereas international business visits tend to surpass a period over 15 nights.
- International holiday-goers in the region typically have longer stays than domestic visitors before exploring other parts of the country, likely maximising their visit given the international travel costs and subsequent intra-country travel.

Domestic Visitors – Length of Stay by Purpose, Roebourne & Karratha SA2s



** Other includes visiting for reasons such as medical, education, providing transport, attending a funeral and other undisclosed reasons.*
Source: Tourism Research Australia

International Visitors – Length of Stay by Purpose, Roebourne & Karratha SA2s



** Other includes visiting for reasons such as medical, education, providing transport, attending a funeral and other undisclosed reasons.*
Source: Tourism Research Australia

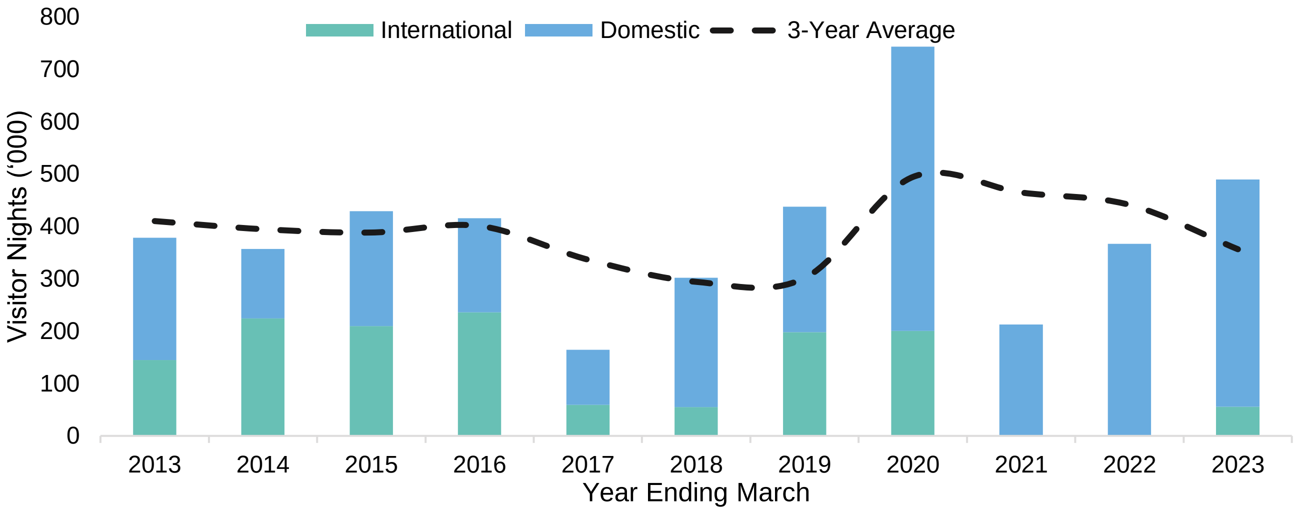
Key Findings

Non-business visitation pertains to reasons such as visiting friends and family, holidays, medical purposes, and more, but exclude business and employment-related purposes.

Across the decade to 2023, we observed the following.

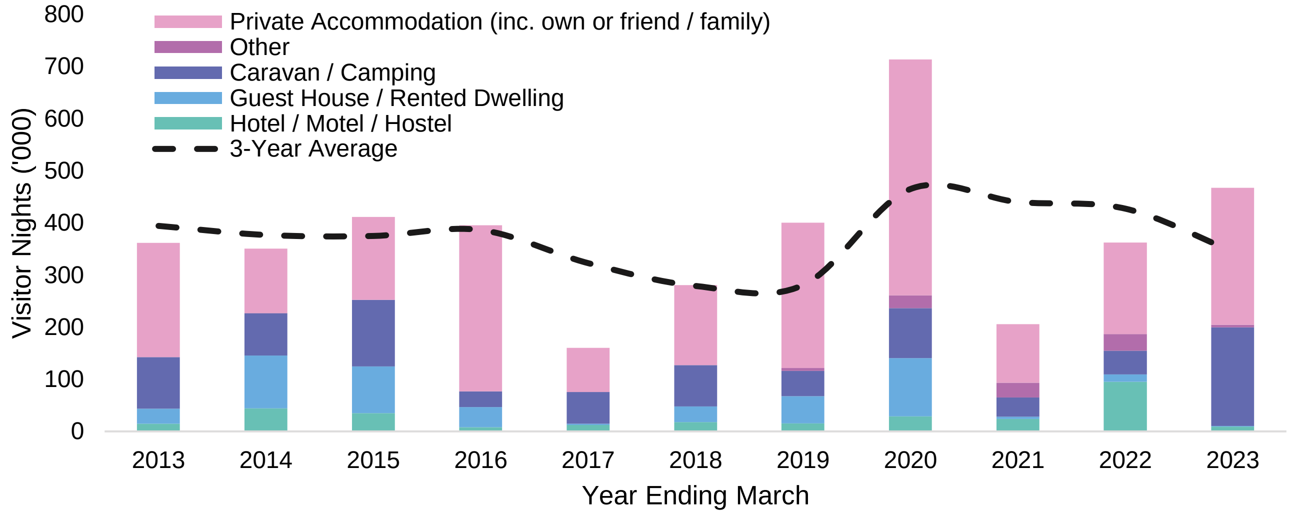
- A largely domestic dominated visitor market over the last few years.
- A steady increase in international visitation was evidenced in the three years to 2020 but was interrupted by the pandemic.
- Owing to pandemic-induced travel restrictions, international visitation dropped to zero in the years 2021 and 2022, with 2023 now seeing a slight recovery.
- Out of this non-business visitation to the area, most of the visitors are staying in private accommodation which includes their own property or that of friends or family.
- However, a large proportion has been staying in the existing caravan and camping parks in the Karratha SA2, with an annual average of 81,406 visitor nights from 2013 to YTD 2023. 2023 YTD saw almost 190,000 visitor nights to this accommodation type, a substantial increase from the previous decade's average.

Non-Business Visitor Nights, Roebourne & Karratha SA2s, 2013-23



Source: Tourism Research Australia

Non-Business Visitor Nights By Accomm, Roebourne & Karratha SA2s , 2013-23



** Other includes those who stayed in houseboats, boats, cruises and glamping facilities.*
Source: Tourism Research Australia

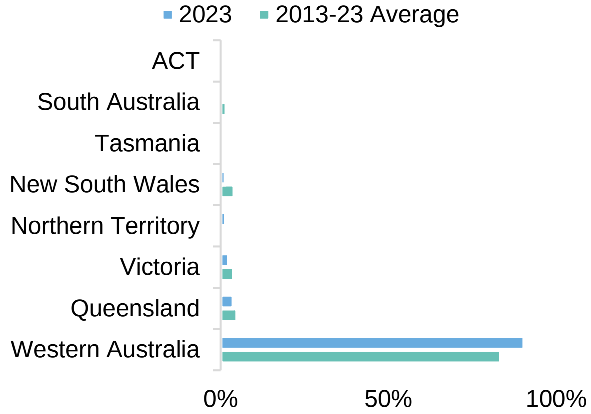
Key findings

Presented adjacent is a breakdown of origin of domestic and international non-business visitors to the region. Key points to note.

- Domestic non-business visitation to the region remains localised with majority of the visitation coming from within Western Australia, with a slight presence of visitors from Queensland, Victoria and New South Wales
- In terms of international non-business visitation, the Philippines had a positive outlier year in 2023, far exceeding visitation numbers from all other countries.
- Visitation from the New Zealand and European countries such as England, Germany and Italy has also remained prominent in the decade to March 2023.

While the region is predominantly attracting domestic visitation from within Western Australia, there has been a notable presence of international visitation from emerging countries such as India and the Philippines, alongside consistent visitation from other Western and European countries.

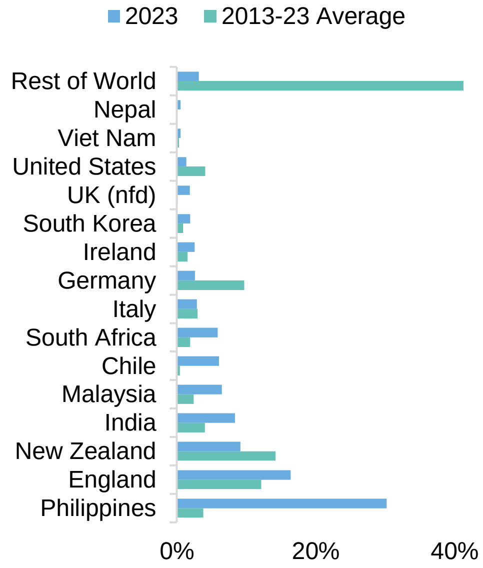
State of Residence for Domestic Non-Business Visitors, Year Ending March 2023



HOME STATE	2023	2013-23 AVERAGE
Western Australia	60,045	51,898
Queensland	2,570	3,117
Victoria	1,605	2,490
Northern Territory	1,082	547
New South Wales	1,006	2,580
Tasmania	0	367
South Australia	0	1,134
ACT	0	0
Total	**66,308**	**62,134**

Source: Tourism Research Australia

Top 15 Countries of Origin | Intn'l Non-Business Visitors, Year Ending March 2023



HOME COUNTRY	2023	2013-23 AVERAGE
Philippines	1,094	214
England	593	678
New Zealand	331	797
India	302	225
Malaysia	235	136
Chile	220	26
South Africa	213	108
Italy	104	166
Germany	94	543
Ireland	93	86
South Korea	70	52
UK (nfd)	69	7
United States	49	229
Viet Nam	20	17
Nepal	19	2
Rest of World	114	2,310
Total	**3,619**	**5,595**

Source: Tourism Research Australia

03

ACCOMMODATION GAP ANALYSIS

KEY INSIGHTS

1. **The Dampier site will offer a different experience to most nearby tourist parks.** Tourist parks in the Karratha area are typically large with 100-200 accommodation spots (e.g. cabins or caravan bays) and a range of amenities such as pools, air-conditioned recreation rooms and an on-site cafes / convenience store in addition to the minimum requirements. In locations with large temporary workforces, including Karratha, these are often booked out for worker accommodation.

2. **Unique offer for Dampier.** The only existing tourist park in the town of Dampier is a transit park with a 3-day maximum stay limit, and very limited amenities. Anecdotally occupancy is high and a popular choice for people visiting local friends and family.

3. **Occupancy rates for seasonal locations are highly variable.** On-site caravan and cabins in WA averaged 65% occupancy in the year to November 2023 and 52% for camping and caravan sites. In the seasonal region of Australia's North West hotel and Airbnb accommodation occupancy ranges from 70-80% in the June/July peak season to 35-50% in the January off-peak season.

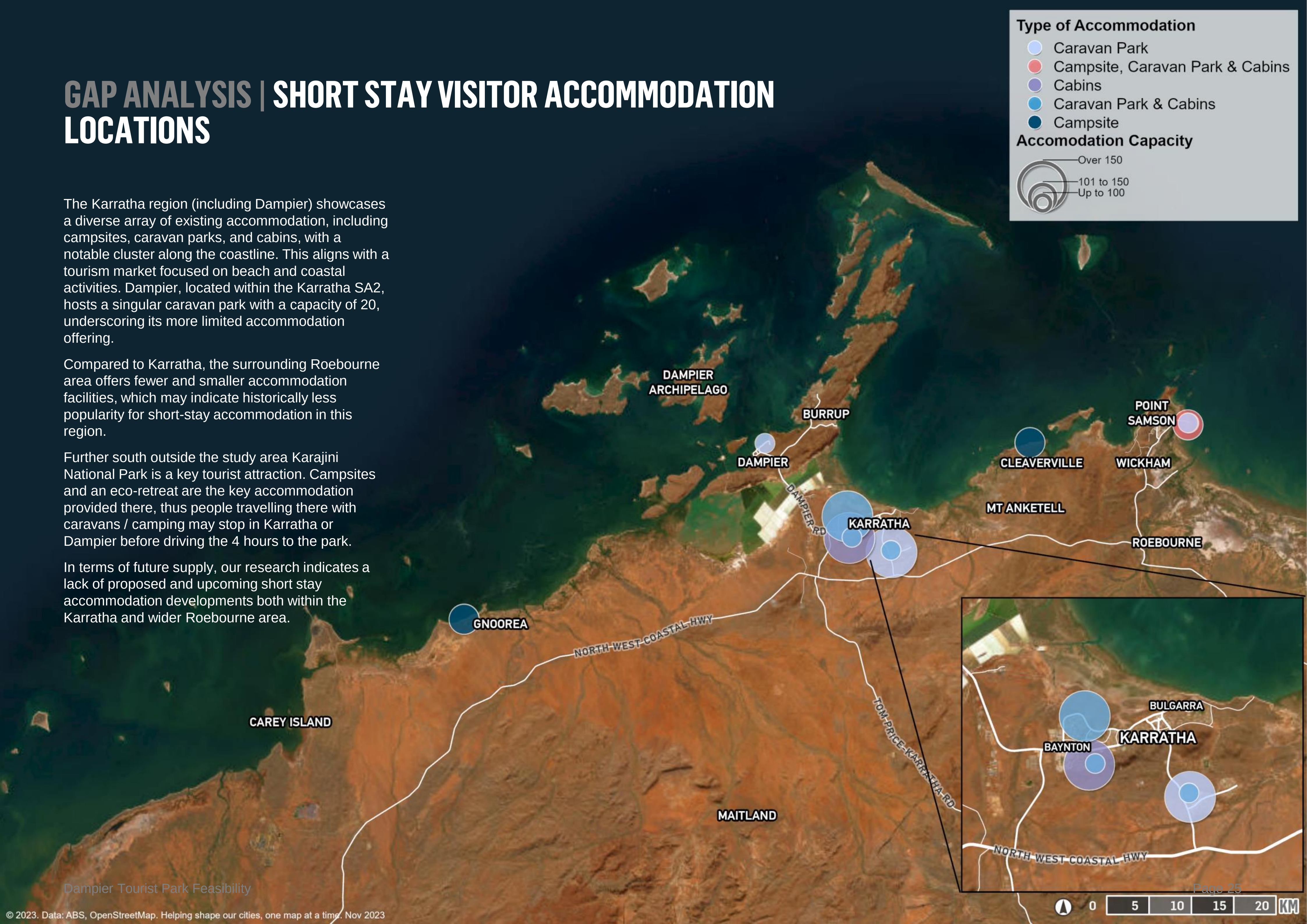
GAP ANALYSIS | SHORT STAY VISITOR ACCOMMODATION LOCATIONS

The Karratha region (including Dampier) showcases a diverse array of existing accommodation, including campsites, caravan parks, and cabins, with a notable cluster along the coastline. This aligns with a tourism market focused on beach and coastal activities. Dampier, located within the Karratha SA2, hosts a singular caravan park with a capacity of 20, underscoring its more limited accommodation offering.

Compared to Karratha, the surrounding Roebourne area offers fewer and smaller accommodation facilities, which may indicate historically less popularity for short-stay accommodation in this region.

Further south outside the study area Karajini National Park is a key tourist attraction. Campsites and an eco-retreat are the key accommodation provided there, thus people travelling there with caravans / camping may stop in Karratha or Dampier before driving the 4 hours to the park.

In terms of future supply, our research indicates a lack of proposed and upcoming short stay accommodation developments both within the Karratha and wider Roebourne area.



GAP ANALYSIS | CARAVAN AND CAMPING ACCOMMODATION SUMMARY

Dampier / Karratha Short-Stay Audit Findings

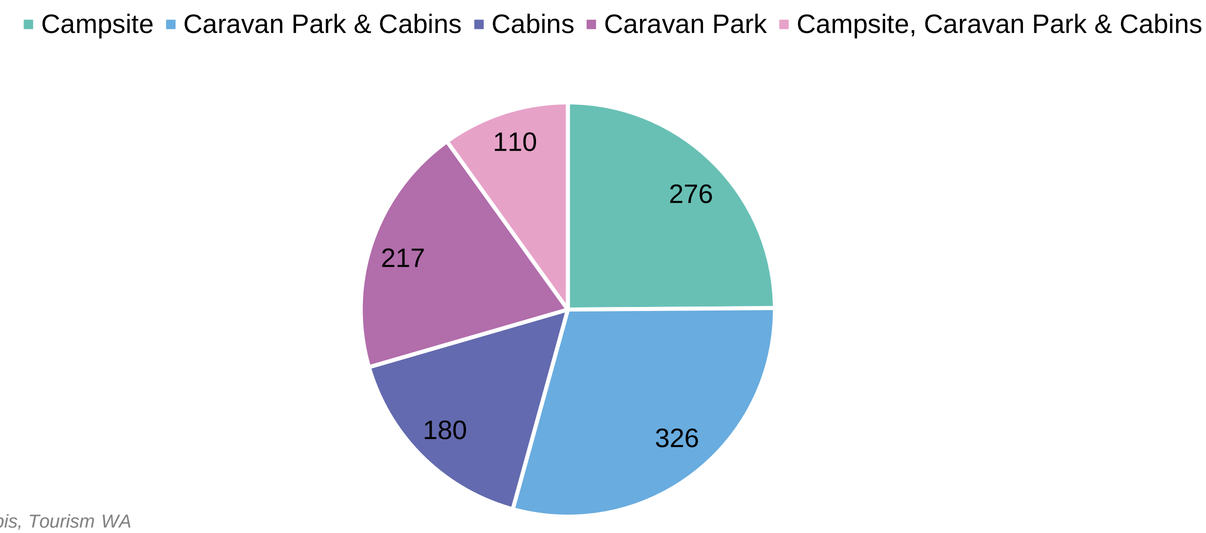
The audit of short-stay caravan park and camping ground and cabin accommodation in the Dampier / Karratha Area returned an estimated total of 11 establishments with a combined capacity of rooms.

The audit was undertaken in Q3 2023 and included caravan parks, campsites, cabins and establishments that included two or all three of these typologies. Many establishments have capacity of more than 100 rooms (55%), with two very small establishments of capacities of 15 and 20 rooms. Notably, there is a lack of any medium-sized caravan park/camping/cabin establishments of 30 to 50 sites / rooms, with zero in the Karratha/Dampier region.

Pricing rates have a high degree of variability between establishment typologies with options priced at $16 per night for campsites ranging all the way to $293 per night for cabins. This reflects the difference in offered products, with caravan parks and cabins often including substantially greater amenities than a standard campsite. It is also important to note that within each typology there is still considerable variation in amenity offered which is represented in pricing as well.

Common amenities in existing supply include swimming pools (55% of establishments), laundries (73% of establishments) and communal kitchens (45% of establishments). An overview on the following page gives further detail and overall context to the quality and variation between existing supply.

Caravan & Cabin Capacity by Establishment Type, City of Karratha



Source: Urbis, Tourism WA

Caravan and Cabin Supply Breakdown, City of Karratha

TYPE	NO. ESTABLISHMENTS	TOTAL ROOM CAPACITY	AVERAGE CAPACITY	AVERAGE PRICE/NIGHT
Campsite	2	276	138	$16
Caravan Park & Cabins	3	326	109	$211
Cabins	3	357	119	$211
Caravan Park	2	40	20	$48
Campsite, Caravan Park & Cabins	1	110	110	$220

Source: Urbis

GAP ANALYSIS | CARAVAN AND CAMPING ACCOMMODATION SUPPLY

NAME	ADDRESS	AMENITIES	MAX. LENGTH OF STAY	TYPE	ROOM CAPACITY	STAR RATING	ROOM RATES / NIGHT
40 Mile Beach	40 Mile Beach, WA	Natural Boat Ramp, Public Toilets, Sullage Disposal Points	3-nights per 28 days	Campsite	134	N/A	$16
AAOK Karratha Caravan Park	1060 Mooligunn Rd, Karratha	Café, Free Gas BBQ, Communal Kitchen, Laundry, Disabled Toilet and Dump Point	Maximum legal limit	Caravan Park & Cabins	85	2 Star	$293
Aspen Karratha Village	20 Radley Dr, Baynton	Restaurant & Bar, Pool, Gym, Tennis Court, Free Wi-Fi	Maximum legal limit	Cabins	180	3 Star	$239
Cherratta Lodge	Lot 550 Cherratta Rd, Karratha Industrial Estate	Pool, Gym, Restaurant, Laundry Facilities	Maximum legal limit	Cabins	162	4 Star	$143
Cleaverville Campsite	Cleaverville Rd, Cleaverville	Natural Boat Ramp, Public Toilets, Sullage Disposal Points	28 nights per 3 months	Campsite	142	N/A	$16
Dampier Caravan Park	198 The Esplanade, Dampier	Toilets, Laundry, Communal Kitchen, Free Gas BBQ	3-nights	Caravan Park	20	N/A	$40
Discovery Parks - Balmoral, Karratha	Lot 2654 Bayview Rd, Gap Ridge	Activity Room, Free Gas BBQ, Playground, Communal Kitchen, Laundry, Free Wi-Fi, Dump Point and Pool	Maximum legal limit	Caravan Park & Cabins	157	2 Star	$170
Discovery Parks - Pilbara Karratha	70 Rosemary Rd, Baynton	Activity Room, Free Gas BBQ, Sports Facilities, Store, Communal Kitchen, Laundry, Free Wi-Fi, Pool and Dump Point	Maximum legal limit	Caravan Park & Cabins	84	3 Star	$170
Samson Beach Caravan Park	10 Miller Cl, Point Samson	Free-Gas BBQ, Tavern, Bistro, Store, Public Toilets, Laundry, Fish Scaling Table	Maximum legal limit	Caravan Park	20	N/A	$55
Samson Beach Chalets	44 Bartley Ct, Karratha	Free-Gas BBQ, Tavern, Bistro, Store, Public Toilets, Laundry, Fish Scaling Table, Swimming Pool	Maximum legal limit	Cabins	15	4 Star	$250
The Cove Holiday Village	Lot 259 Macleod St, Point Samson	Swimming Pool, Laundry, Communal Kitchen, Free Wi-Fi, Theatre Room, Small Library, Playground, Free Gas BBQ, Fishing Cleaning Bay, Store, Dump Point, Bicycle and Snorkelling Gear Hire	Maximum legal limit	Campsite, Caravan Park & Cabins	110	4 Star	$220

Source: Google Maps, STR Global, Cordell, Urbis

Key Findings

In Australia's North West, the peak season typically sees occupancy rates between 70% and 80% (mainly in June and July). December and January consistently have the lowest occupancy rates, ranging from 34% in 2018-19 to 49% in 2021-22.

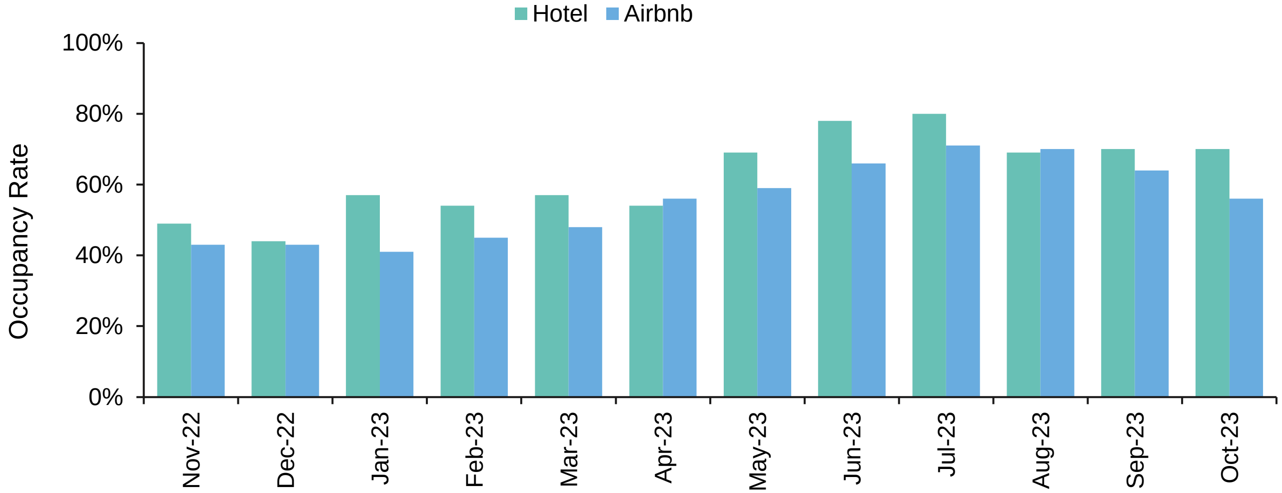
In both 2021-22 and 2022-23, the occupancy rates surpassed the pre-COVID levels of 2018-19 by up to 23% in January and 20% in September.

Compared to the average occupancy rate of 75% for both hotel and Airbnb listings in Destination Perth, the North West sits 12 percentage points below hotel occupancy and 20 percentage points below Perth Airbnb occupancy, primarily attributed to the high levels of variation between the North West's high and low seasons creating additional operating challenges for providers in this region.

Correspondingly, revenue per room increases monthly from April and peaks in July at $256 / night for hotels before steadily declining to its December trough of $67 / night as it adjusts to changes in occupancy and market demand forces.

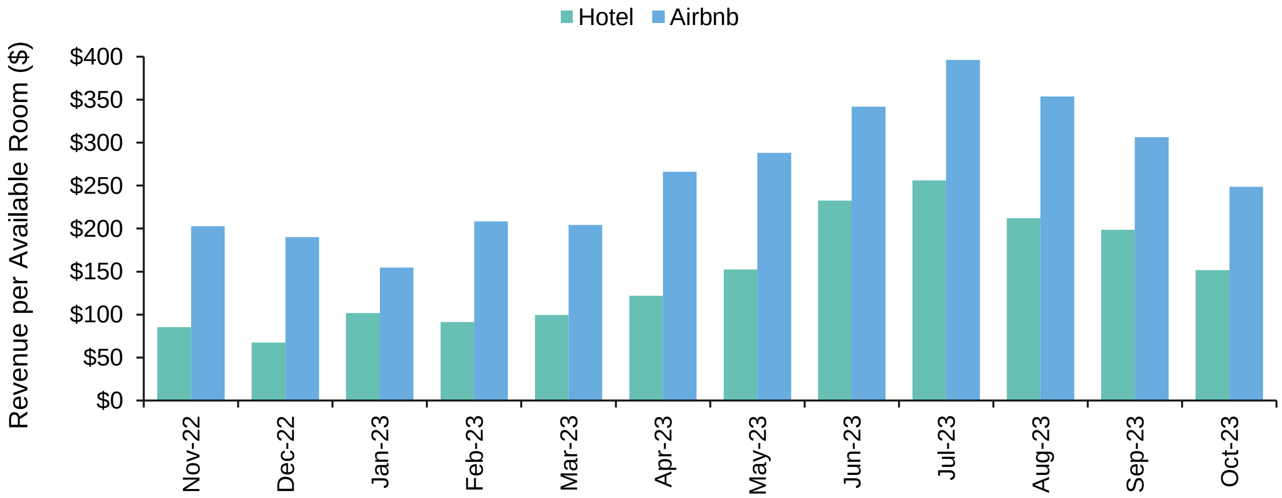
Accommodation providers strategically open and close rooms or establishments in anticipation of low and high seasons. Some smaller establishments close before the demand lull in January to March, leading to a spike in occupancy rates after December. The seasonality in supply has significantly increased in 2022-23 compared to previous years as providers adapt to changes in tourism behavior. Past years accommodation performance data can be found in the Additional Data section of the appendices.

Occupancy Rate, Australia's North West



Source: STR, AirDNA, TourismWA

Revenue per Available Room, Australia's North West



Source: STR, AirDNA, TourismWA

GAP ANALYSIS | CARAVAN AND CAMPSITE PERFORMANCE

Key Findings

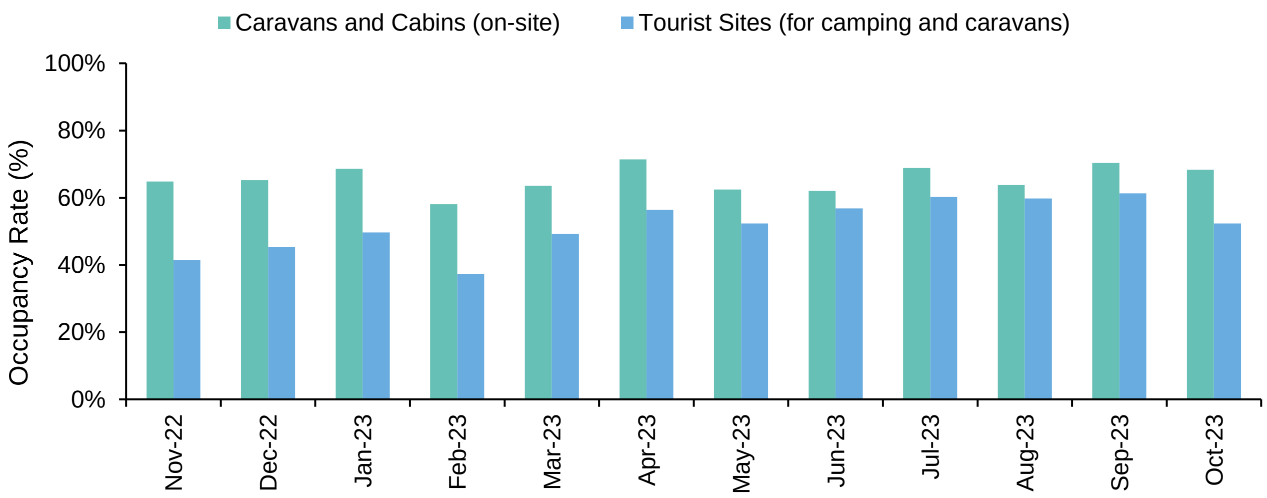
Looking specifically at West Australian caravan parks and camping grounds throughout 2023, it becomes evident that the state faces two cyclical activity peaks, in April and September, with January and July close behind.

Occupancy data highlights the positive demand spikes in these months, with occupancy levels for on-site caravans and cabins reaching or close to the 70% mark in these high months. The highest monthly occupancy rates caravans and cabins in the year to October 2023 are as follows: *71% (April), 70% (September) and 69% (January, July).*

These months correspondingly also achieve the highest average revenues per site with average on-site caravans and cabins exceeding the $150/night mark in only these four months of April, September, January and July, as availability tightens. Conversely, the month of February records a sudden negative occupancy shock, resulting in the lowest month of revenue for cabins and caravans, falling to an average of $106/night. Camping grounds generally experienced higher vacancies of 47-67%, with greater levels of monthly variation in both occupancy and revenue per site, averaging at approximately $30/site per night.

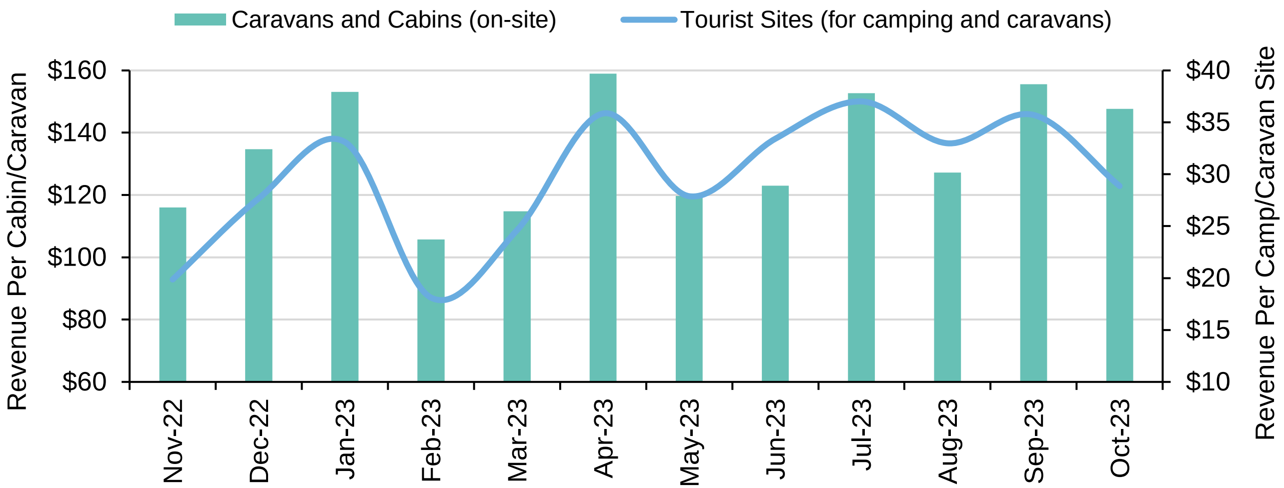
The variability of occupancy and hence revenue means that operators must plan resources and budget in a manner that takes into account substantial changes in monthly revenue and employee requirements throughout the year. It is also important to note, this data is an average for all of Western Australia, and regional visitation for the North West and more specifically the Karratha/Roebourne area should add context to the regional variation a Dampier facility should expect.

Occupancy Rate, Western Australia



Source: Tourism Research Australia

Revenue per Cabin or Site, Western Australia



Source: Tourism Research Australia

04

DEMAND FORECASTS

KEY INSIGHTS

1. **Accommodation demand growth.** A long term trend of increased visitation underpins future growth projections.

2. **Karratha area growth despite relatively low tourism activity.** There is expected to be demand for up to 260 caravan / camping spots in the Karratha area to 2033. Some of this demand can be met at the subject site.

3. **Very high potential future growth.** The limited tourism offering in Dampier, high usage of the existing Karratha tourist parks for worker accommodation and potential UNESCO World Heritage listing of Murujuga National Park has high potential to increase the demand for accommodation beyond that indicated by the modelling, which has taken a conservative approach and is informed by historical visitation numbers.

View on Future Demand

Key factors considered when forming a view of potential for future visitor growth to Dampier were:

- Location factors;
- Existing and expected future tourist attractions (e.g. Murujuga National Park UNESCO World Heritage Listing);
- Historical visitation data;
- Tourist growth projections for the region (i.e TRA); and
- Existing competition and usage of competing tourist parks for non-tourist accommodation.

Based on these factors current and future accommodation demand for the Karratha and Roebourne areas has been estimated.

The average occupancy of caravan park and campsite accommodation (excluding short term rentals) was estimated at 66% sourced via Caravan Stats. Given the seasonal nature of the market, this is a reasonable occupancy rate and is likely higher within motel / hotel offerings.

Visitor nights (base case) are forecast to increase in the next decade from 1,880 to 2,900. The proportion of international visitors is forecast to remain around 15-20% of total visitors.

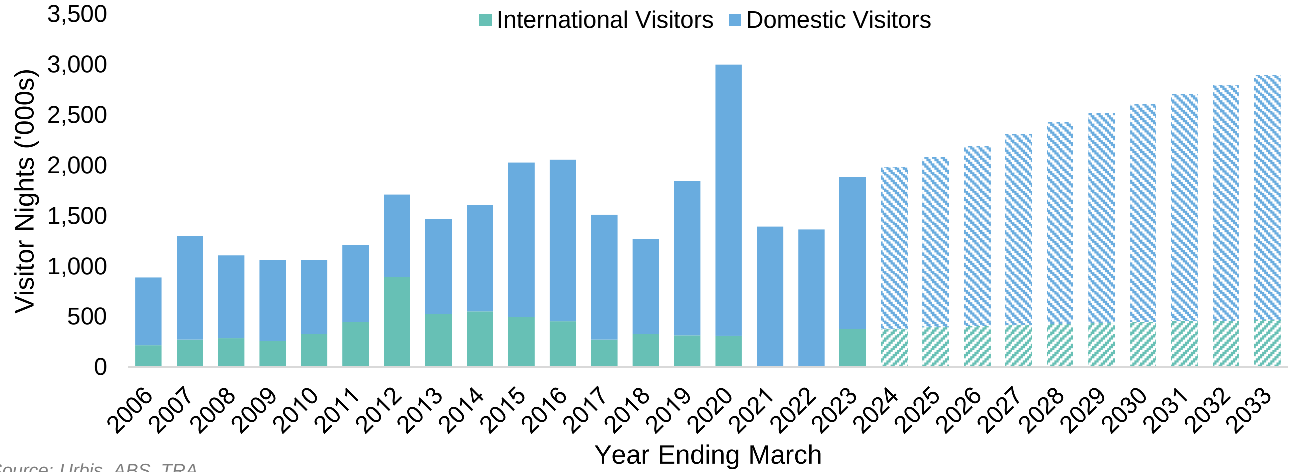
Without additional short stay supply planned for the area, there would likely be constraints on accommodating the forecast visitor growth. As such, there is a strong rationale that new accommodation offerings could be viable. This is analysed further overleaf.

Key Assumptions

ASSUMPTION	HISTORIC (2013-2023)	FORECAST (2023-2033)	COMMENTS
International Visitors – Growth (p.a.)	9.5%	2.4%	In line with historical growth and TRA forecasts
Domestic Visitors – Growth (p.a.)	5%	4.9%	In line with historical growth and TRA forecasts
Occupancy Rate	66%	66%	In line with historical data from Caravan Stats for Western Australia
Prop. Caravan Park & Campsite Accom. - Domestic	8%	8%	In line with historical TRA average
Prop. Caravan Park & Campsite Accom. – Intn'l	5%	5%	In line with historical TRA average
Guests per Accommodation Spots	1.2	1.2	Kept constant throughout the forecast horizon

Source: Urbis, ABS, TRA

Historical and Forecast Visitor Nights, 2006 – 2033



Source: Urbis, ABS, TRA

Demand Modelling

The demand projections below indicates a case for a new caravan park in Dampier, highlighting a surge in demand for short-stay caravan and campsite accommodations post-pandemic. Our in-house forecasts show a consistent rise in international and domestic visitor nights from 2023 to 2033 by 2.4% and 4.9%, respectively, signifying a steady market to cater to. Furthermore, with the absence of upcoming caravan parks and campsite projects to meet this need, there is a market opportunity worth assessing.

The anticipated additional accommodation demand is anticipated to peak by 2028 to some 31 rooms. Our projections for 2033 indicate the need for up to 260 extra caravan park and campsite spots, further corroborating the growing market gap. Our analysis affirms the market feasibility of a potential new caravan park, highlighting its critical role in meeting increasing demand. This is particularly the case with the current limitation of the sole existing option in Dampier (i.e, Dampier Caravan Park) offering a maximum three-day stay to visitors. With most of the visitors to the region staying in the region for more than a week, it is worthwhile to further assess the viability of an additional offering in Dampier.

ADDITIONAL DEMAND FORECAST			2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
DEMAND	INTERNATIONAL	VISITOR NIGHTS: TOTAL	372,161	383,075	394,309	405,872	417,774	430,025	438,196	446,521	455,005	463,651	472,460
		VISITOR NIGHTS: CARAVAN PARK / CAMPING (5%)	17,002	17,500	18,014	18,542	19,085	19,645	20,018	20,399	20,786	21,181	21,584
	DOMESTIC	VISITOR NIGHTS: TOTAL	1,503,909	1,592,104	1,685,472	1,784,314	1,888,953	1,999,729	2,077,518	2,158,334	2,242,293	2,329,518	2,420,136
		VISITOR NIGHTS: CARAVAN PARK / CAMPING (8%)	115,841	122,635	129,826	137,440	145,500	154,033	160,024	166,249	172,716	179,435	186,415
SUPPLY	TOTAL	FORECAST ADDITIONAL CARAVAN PARK SPACES	1,205	1,205	1,205	1,205	1,205	1,205	1,205	1,205	1,205	1,205	1,205
NET ADDITIONAL DEMAND (ACCOMMODATION SPOTS) = ([(A)T - (A)T-1] + [(B)T - (B)T-1]) X 1000 ÷ (C) ÷ (D) ÷ (E)	1.2 VISITORS / ROOM	66% OCCUPANCY	-	25	27	28	30	31	22	23	24	25	26
CUMULATIVE ADDITIONAL DEMAND (ACCOMMODATION SPOTS)			0	-	52	80	110	141	163	186	210	234	260

Source: Tourism Research Australia, Caravan Stats, Urbis

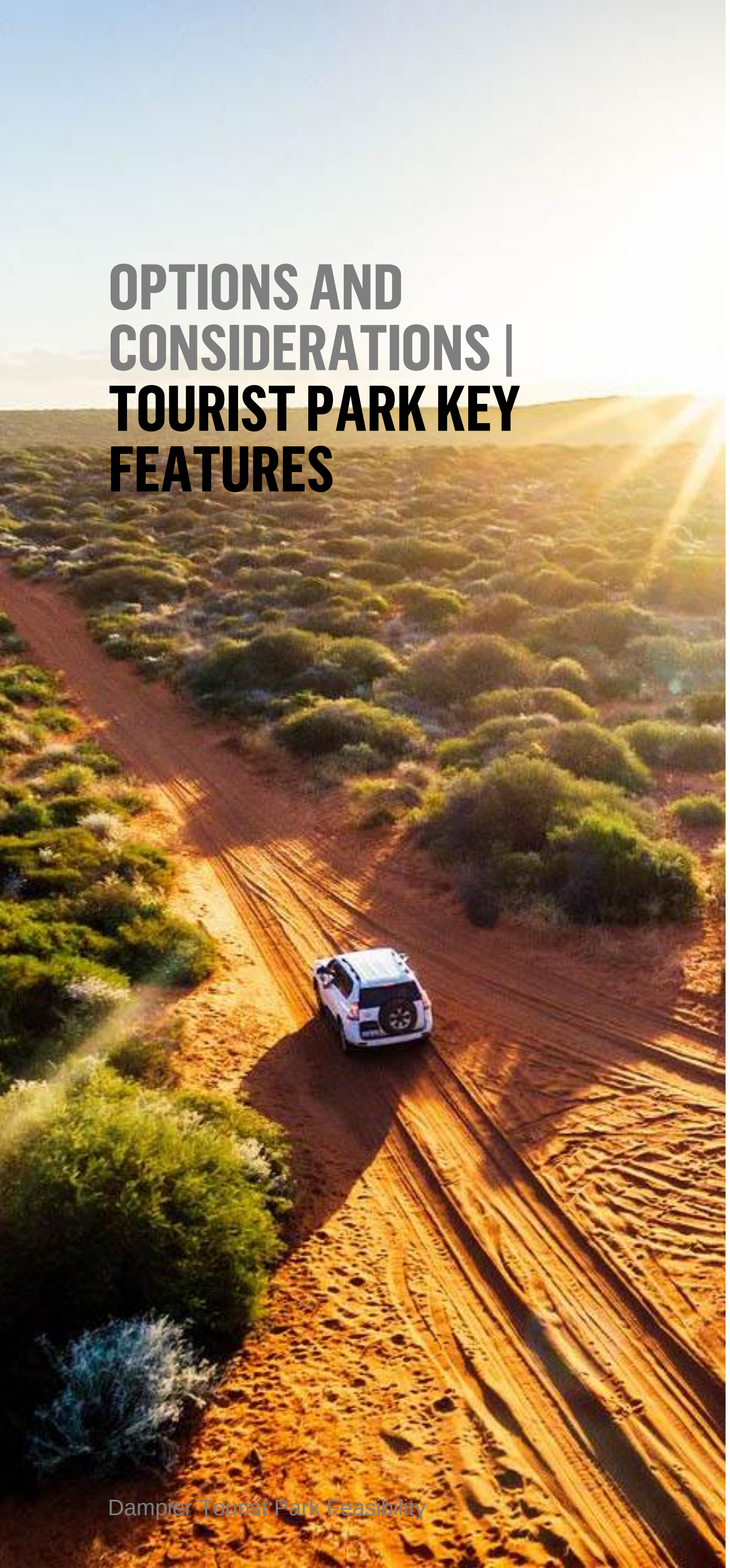
05

DEVELOPMENT OPTIONS AND CONSIDERATIONS

KEY INSIGHTS

1. **Yield can be optimised despite site constraints.** Although the small size, unusual footprint, topography and service easements are challenges, the maximum capacity of the site is likely to be around 30-40 accommodation spots.

2. **Some site features can be leveraged to provide a unique experience and sense of place.** Key opportunities for the site are retention of existing vegetation, close proximity to a range of natural and built amenities, ocean views and wind protection.

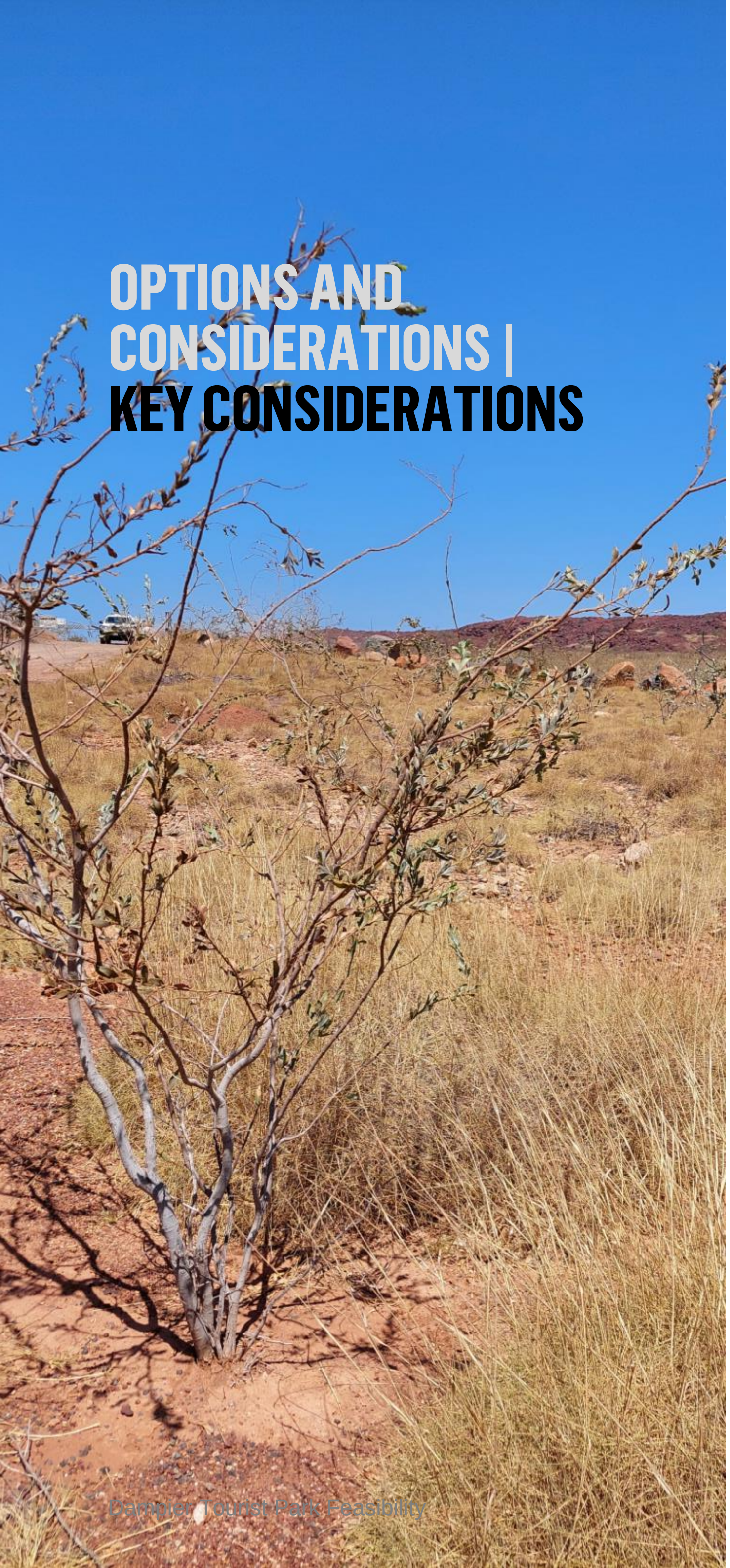


OPTIONS AND CONSIDERATIONS | TOURIST PARK KEY FEATURES

Key features of tourist parks are shown in the table below.

The Caravan Parks and Camping Grounds Regulations 1997 have also been used to inform the concept design of the tourist park.

FEATURES	OPTIONS	COMMENTS
Accommodation Types	▪ Camping unpowered ▪ Camping powered ▪ Caravan ▪ Cabins ▪ Serviced apartments	▪ Most parks have a mix of accommodation types (caravan, camping and cabins). ▪ Total yield of accommodation spots is typically greater than 100+.
Amenities / Services	▪ Ensuites ▪ Shared ablutions ▪ Laundry facilities ▪ BBQs ▪ WiFi ▪ Dump point ▪ Water connections ▪ Camp kitchen ▪ Kiosk / shop ▪ Restaurant / dining hall / cafe ▪ Conference facilities ▪ Theatre room ▪ Reading room ▪ Pool ▪ Games / activity area ▪ Gym ▪ Playground ▪ Boat parking	▪ Majority of tourist parks have most of these amenities. ▪ Pools are a key feature of the majority of coastal tourist parks, but require large scale to support.
Location and Outlook	▪ Beachside location ▪ Ocean / river / landscape views ▪ Within walkable town ▪ Within larger town with services ▪ Close to work sites	▪ Proximity to tourist activities, services or work location critical factor for location success.



OPTIONS AND CONSIDERATIONS | KEY CONSIDERATIONS

Key considerations for the overall outcome of development have been used to guide development of site concept options.

CONSIDERATION	DESCRIPTION
Yield	▪ How many spots can be accommodated ▪ Split of unpowered camping sites, powered caravan sites, cabins
Cost	▪ Construction costs ▪ Operational costs
Financial sustainability	▪ Return on investment over the next 10 years ▪ Long-term tourism growth for Dampier area
Development risks	▪ Keeping easements free versus using for driveways / caravan sites ▪ Water treatment plant capacity may limit scale
Attractiveness	▪ Location (town and region) attractiveness for tourists ▪ Tourist park amenities, features, services, outlook that makes people come and stay for more than a night while transiting
Strategic alignment	▪ Other strategic goals – e.g. place development, expenditure at nearby businesses, development of tourism industry in Dampier, town vibrancy

WORKSHOP – RANKING KEY CONSIDERATIONS AND OPTIONS

Key considerations for the overall outcome of development of the site were ranked during an on-site workshop.

These have been used to inform refinement of the site concept options.

DESIGN CRITERIA	DESCRIPTION	DESIGN CRITERIA	DESCRIPTION
Essential features	▪ General principle – keep to minimum required under regs ▪ Caravans – grey nomads ▪ Smallest scale shared ablutions ▪ Good quality ablutions ▪ Laundry – not a viable alternative nearby ▪ Camp kitchen ▪ Regulations – roads minimums, ablutions, access for rubbish services etc ▪ Cyclone resistant design – anything built will be really expensive ▪ Space for communal gatherings near camp kitchen ▪ Public access to Jurak Park via Haig Rd - maintain sense of safety and security (could be landscaping – bougainvillea, barrier but not fence, setbacks and lighting, direct pedestrians / vehicles in the appropriate location)	**Success factors**	▪ Management model – will it be closed for part of the year or run all-year round, challenge for staffing ▪ Staged approach to lower risk / cost? Start with caravan parks, build cabins later ▪ Parking for vehicles – needs to be accommodated on site ▪ Traffic volume – future stage of this study ▪ Connecting / integrating the site with the surrounding existing businesses / public realm (e.g. gate to Soak, path to shopping centre and community centre, bowls club) ▪ Maximise caravan sites – including investigation whether some of the easements are needed ▪ Future proof – is there anything that will restrict Haig Rd from being extended in the future ▪ Maximise use of site – build appropriately on easements ▪ Consider caravan sites and camper trailer sites in hard to get locations, where turning circles are tight ▪ Site design to consider drainage, how to accommodate services required ▪ Permeable paved surfaces ▪ Length of stay – up to 3 months ▪ Consider safe pedestrian crossings
Nice to have	▪ Ensuite sites? Good if they fit, might be hard to accommodate – probably not worth doing ▪ Cabins not necessarily essential, option for non-flat areas of the site, but a high cost ▪ Camping sites for locations that can't accommodate anything else ▪ Boat parking ▪ Dump points – check regulations ▪ Keep mature trees where possible – will need arborist report to determine if trees are safe	**Avoid**	▪ More site rather than lots of amenities ▪ Don't want to compete with amenities / retail nearby ▪ Becoming a defacto workforce camp ▪ Huge costs for construction / on-going costs ▪ No major topography changes ▪ Impacts on the vacant site to the east – vegetation may be priority species, may be rock art

CONCEPT OPTIONS

CONCEPT OPTIONS| SITE OPTIONS

Site Options Description

Following on from the Development Options Workshop, two options to develop the site were confirmed.

OPTION 1: STAGED APPROACH

<u>Stage 1</u> – develop the whole site for caravan bays / camping, with the minimum shared amenities required.

<u>Stage 2</u> – convert 10 of the caravan / camping spots for cabins and 3 for caretaker housing.

This option takes a conservative and lower risk approach to developing the site, allowing tourist demand in Dampier and site management to be established and before committing to building the cabins which will have higher capital and operational costs, and require additional staffing.

The capital cost of this option will be higher overall due to needing to convert some of the caravan / camping sites for cabins.

OPTION 2: COMPREHENSIVE TOURIST PARK

Develop the whole site for caravan / camping and cabins, with the minimum shared amenities required.

This option fully develops the site as it would be for Stage 2 of Option 1.

While there are higher risks and ongoing costs for maintenance and staffing from the outset, there are some cost savings in undertaking the development all at once.

Option 1: Staged Approach - Accommodation Schedule

ITEM	DESCRIPTION
Stage 1: Caravan / Camping	
Caravan Bays x 33	▪ Permeable paving for access to easements
Reception & Admin	▪ Off Haig Close, visible from Church Road
Consolidated Communal Amenities	▪ Conversion/Replacement of Squash Clun building and surrounding open space
Stage 2: Cabin Conversion	
Cabins x 10	▪ Conversion of caravan / camping bays to cabins (Waterfront view location)
Caravan Bays x 21	▪ Permeable paving for access to easements
Management Residence	▪ Conversion of caravan/camping bays to residence or additional cabins (north-east corner)

Option 2: Comprehensive Tourist Park - Accommodation Schedule

ITEM	DESCRIPTION
Cabins x 10	▪ Conversion of caravan / camping bays to cabins (Waterfront view location)
Caravan Bays x 21	▪ Permeable paving for access to easements
Management Residence	▪ Conversion of caravan/camping bays to residence or additional cabins (north-east corner)

CONCEPT OPTIONS| OPTION 1 CONCEPT – CARAVAN / CAMPING ONLY

LEGEND:

- Subject Site
- Indicative extent of easements
- * Potential location for Waste Disposal (On site storage) Subject to future detail design
- 1 Reception
- 2 Primary Entry visible from Church Road
- 3 Communal amenities - utilizing existing building or new building within the same location
- 4 Communal amenities and retained existing garden areas
- 5 Additional entry location for northern sites
- 6 Boat or trailer parking opportunity
- 7 Graded level shift within landscaped area
- 8 Connection to Church Road
- 9 Crossing location opportunity
- 10 Landscaped setback

SITE SUMMARY:

Use	Area	Yield
Total Site	1.165ha	
Roads & Parking	2733m²	
Open Space & Landscape	5020m²	
Reception Check-in & Admin	160m²	136m² GFA
Communal Building Bathrooms Laundry Kitchen Small Recreation Area	352m²	299m² GFA
Powered Caravan Sites	3387m²	33 Sites*

*Potential loss of 1-3 caravan sites dependant on waste disposal requirements

CONCEPT OPTIONS| OPTION 2 CONCEPT – CARAVAN AND CABINS

LEGEND:

- Subject Site
- Indicative extent of easements
- * Potential location for Waste Disposal (On site storage) Subject to future detail design
- 1 Reception
- 2 Primary Entry visible from Church Road
- 3 Communal amenities - utilizing existing building or new building within the same location
- 4 Communal amenities and retained existing garden areas
- 5 Additional entry location for northern sites
- 6 Boat or trailer parking opportunity
- 7 Graded level shift within landscaped area
- 8 Connection to Church Road
- 9 Crossing location opportunity
- 10 Landscaped setback

SITE SUMMARY:

Use	Area	Yield
Total Site	1.165ha	
Roads & Parking	2733m²	
Open Space & Landscape	5020m²	
Reception Check-in & Admin	160m²	136m² GFA
Communal Building Bathrooms Laundry Kitchen Small Recreation Area	352m²	299m² GFA
Powered Caravan Sites	2200m²	21 Sites
Caravan Sites converted to Cabins	874m²	10 Cabins
Caravan Sites converted to Management Housing	314m²*	1 House

*Potential reduction in area dependant on waste disposal requirements

CONCEPT OPTIONS| OPTION 3 CONCEPT – CABINS ONLY

LEGEND:

- Subject Site
- Indicative extent of easements
- 1 Reception
- 2 Primary Entry visible from Church Road
- 3 Manager's Accommodation
- 4 Communal amenities - utilizing existing building or new building within the same location
- 5 Communal amenities and garden area
- 6 Pool Area
- 7 Entry and consolidated parking location for northern sites
- 8 Graded level shift within landscaped area
- 9 Crossing location opportunity
- 10 Landscaped setback
- 11 Path connection to Church Road

SITE SUMMARY:

Use	Area	Yield
Total Site	1.165ha	
Roads & Parking	1857m²	
Open Space & Landscape	5193m²	
Reception ▪ Check-in & Admin	107m²	91m² GFA
Manager's Accommodation	427m²	1 Lot
2 Bedroom Cabins	2552m²	25 Cabins
1 Bedroom Cabins	309m²	4 Cabins
Recreation Building	352m²	299m² GFA
Communal Recreation Area ▪ Pool ▪ Outdoor Kitchen ▪ Seating & play area	853m²	

COST ESTIMATES AND FEASIBILITY TESTING

DEVELOPMENT ANALYSIS | COST ESTIMATES

Overview

An Opinion of Probable Cost by Sage Quantity Surveyors has estimated capital costs for the two shortlisted options, concluding that Option 1 (33 caravan sites) is expected to cost $18.45m to construct and Option 2 (21 caravan sites and 10 cabins) is likely to cost $32.38m. Significant site works have added notable cost to both development options, at over $5.5m investment required before the accommodation sites can be built. Regional price escalation in Dampier has increased the capital costs by a considerable extent (65% above Perth Metropolitan levels). Infrastructure investment in Dampier/Karratha may be required to support any additional utilities requirement that could arise from this project which is not captured in these cost estimates.

CONSTRUCTION COST ESTIMATES

	OPTION 1	OPTION 2
Proposal	***33 Caravan Sites***	***21 Caravan Sites + 10 Cabins***
Tourist Park Dwellings/Sites	$2,803,000	$9,115,000
External Works and Services	$5,569,000	$5,580,000
Sub-Total	**$8,372,000**	**$14,695,000**
Regional Price Escalation (65%)	$5,442,000	$9,552,000
Net Construction Cost	**$13,814,000**	**$24,247,000**
Design Contingency	$1,037,000	$1,819,000
Construction Contingency	$1,114,000	$1,955,000
Professional Fees	$1,278,000	$2,242,000
Escalation to Tender (July 2025)	$1,207,000	$2,117,000
Total Development Cost (excl. GST)	***$18,450,000***	***$32,380,000***

Source: SAGE Quantity Surveyors
Note: Excludes additional costs for potential infrastructure upgrades that may arise to facilitate proposal

DEVELOPMENT ANALYSIS | FEASIBILITY ANALYSIS

Overview

This study undertook development feasibility analysis to understand whether it is likely that the development concepts are viable and to identify the major factors influencing potential viability. This high level analysis is indicative only and adopted assumptions that are subject to further testing.

This approach involved:

- Estimating development costs (e.g. construction costs, fees etc.);
- Estimating operating revenue (e.g. occupancy rate, average daily / weekly rate) and expenses (e.g. maintenance, operator management fee);
- Estimating annual net operating income; and
- Equity requirements and debt payments to service the initial capital expenditure.

CONCLUSIONS

Elevated capital expenditure requirements for both development options in a relatively remote and difficult-to-build location presents the greatest challenge to the financial viability of both proposed concepts.

Due to this reason, despite healthy net profit potential, it is deemed unviable to construct either development option from a commercial standpoint as the operating surplus is insufficient to service debt payments at a 50% adopted loan-to-value ratio.

KEY FEASIBILITY ASSUMPTIONS

	OPTION 1 – CARAVANS	OPTION 2 – CARAVANS & CABINS
Development Cost	$18.45m	$32.38m
Average Occupancy**	66%	
Average Daily Rate - Caravans Site	$58 - $68	$58 - $68
Average Daily Rate - Cabins	-	$280 - $375
Operating Income (p.a.)	$0.56m	$1.13m
Operating Expenditure (p.a.)	$0.36m	$0.65m

Source: Urbis, SAGE
** Average peak period (168 days) occupancy of 82% and off peak period (197 days) of 52%.

ESTIMATED NET OPERATING SURPLUS (PER ANNUM)*

SCENARIO	DEBT	EQUITY	OPTION 1 – CARAVANS	OPTION 2 – CARAVANS & CABINS
No Debt	0%	100%	**$193,000 - $231,000**	**$479,000 - $572,000**
50% Debt	50%	50%	**($782,000 - $820,000)**	**($1,205,000-$1,298,000)**
100% Debt	100%	0%	**($1,790,000- $1,832,000)**	**($1,453,000-$1,547,000)**

Source: Urbis
** Excludes taxes, depreciation and asset renewal.

DEVELOPMENT ANALYSIS | ECONOMIC ANALYSIS

Overview

The proposed developments are expected to generate significant economic benefits to the Dampier area in both construction and ongoing phases with $11.2-19.7m of gross value add from construction potential from Option 1 and 2 respectively.

Ongoing economic benefits from the operational phase includes job creation, with over 8 FTE direct and indirect jobs per year resulting from Option 1 and over 12 jobs for Option 2.

The notable expansion of visitor capacity to Dampier is expected to create an additional 9.5k visitor nights from the caravan-only option and over 13.4k visitor nights from the caravan and cabin option.

The additional tourist spend in Dampier area combined with the value-add from additional employment has resulted in strong and positive benefit-cost ratios of 1.43 and 1.22 for Option 1 and Option 2 receptively over a 40-year period.

CONSTRUCTION PHASE BENEFITS

	OPTION 1 – CARAVANS	OPTION 2 – CARAVANS & CABINS
Economic Output	$18.45m	$32.38
Gross Value Added	$11.2m	$19.7m
Employment (FTE Job Years)	54	96

Source: Urbis, REMPLAN
n.b. Economic output and gross value added estimates include direct and indirect (supply chain) benefits.

ONGOING BENEFITS

	OPTION 1 – CARAVANS	OPTION 2 – CARAVANS & CABINS
Direct Employment (FTE)	3.3	5.4
Indirect Employment (FTE)	5.1	7.2
Gross Value Added (p.a.)	$1.55m	$2.22m
Additional Visitor Nights (p.a.)	9,540	13,442
Benefit-Cost Ratio (BCR)	1.43	1.22

Source: Urbis, REMPLAN, TRA
n.b. Gross value added estimates include direct and indirect (supply chain) benefits.
Note: Direct employment is based on the number of employees assumed to be employed in the operation of the facility. Indirect employment is calculated using REMPLAN based on additional estimated daily non-accommodation retail category spend.

DEVELOPMENT ANALYSIS | ADDITIONAL ECONOMIC AND SOCIAL DEVELOPMENT BENEFITS

Key Findings

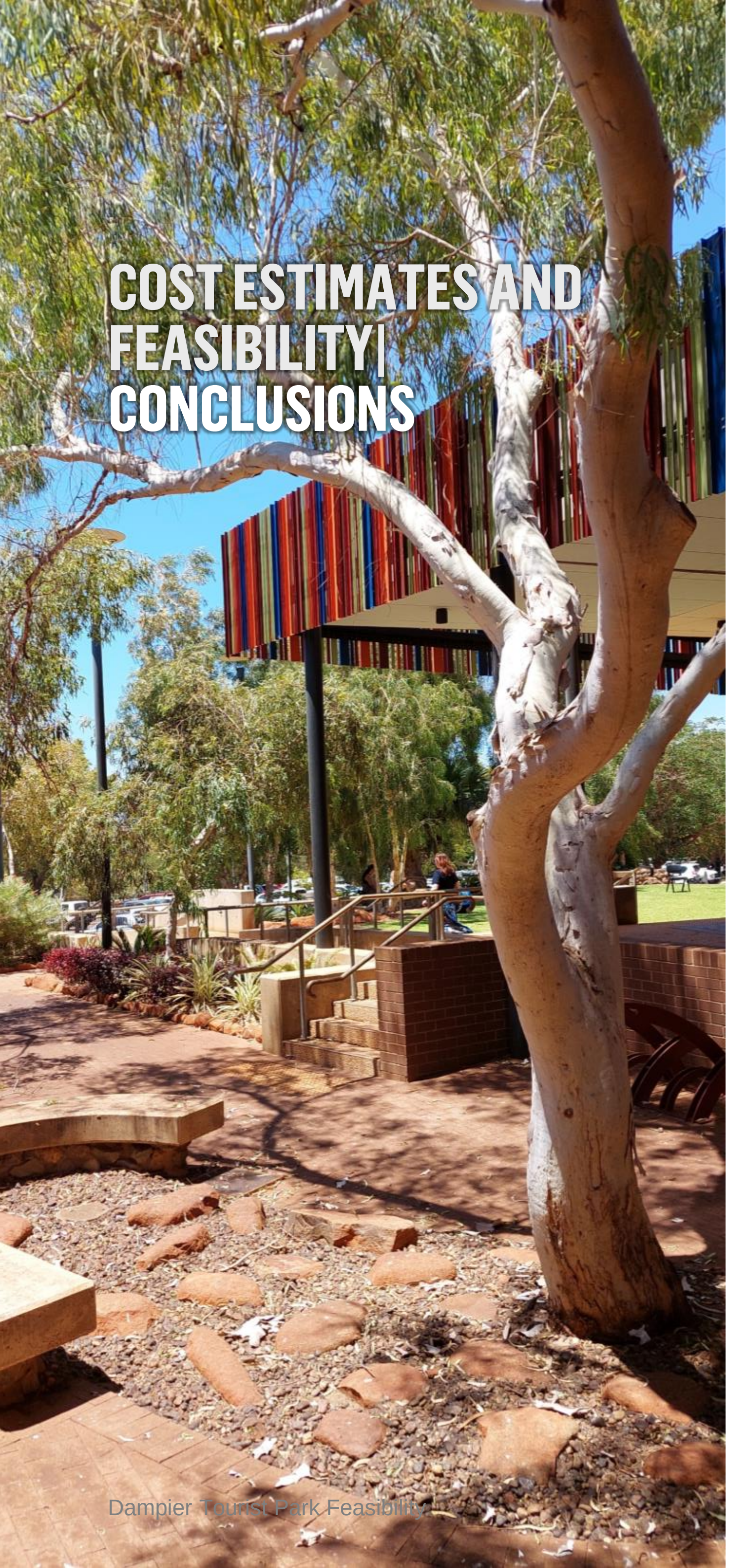
The construction of short stay accommodation will generate significant and ongoing benefits not necessarily quantified in the cost benefit analysis, including:

- **Boosting Business Confidence:** Tourism investment supports local business expansion.
- **Urban Enhancement:** Short-stay developments revitilise the site area and town centre with higher levels of foot-traffic.
- **Economic Diversification:** Tourism investment supports a diversified regional economy.
- **Sustainability:** Eco-friendly design adoption can drive further sustainable development.
- **Taxation and Rates:** Thriving short-stay establishments boost government revenue for community investments.

ADDITIONAL BENEFITS

BENEFIT	DESCRIPTION
Local Business Confidence	Both public and private investment in small and large-scale infrastructure and development projects generally results in a boost in confidence for local small- and medium-sized businesses. Tourism capacity expansion from accommodation development in particular gives complementary businesses confidence to consider expansions and further capital investment.
Vibrancy and Activation	New short-stay establishments can enhance the urban fabric of the town/cities they are located in. The increase in nearby foot traffic, as well as redevelopment of previously unused land improves and activates both the immediate area of the development as well as the town centre which can benefit from greater visitation levels gained from increased visitor capacity.
Economic Diversification	Further tourism-industry investment supports Dampier, Karratha and the Pilbara region balancing a diversified economy with consistent investment in varying industries such as tourism, mining, defense and agriculture supporting a regional economy with greater resilience to national and global fluctuations.
Sustainable Development & Environmental Conservation	Sustainable eco-friendly accommodation developments can act as catalyst for environmentally-friendly design and development in the Pilbara region and help support the Dampier and Karratha's priorities in sustainability and environmental conservation.
Increased Public Community Investment	A thriving short-stay establishment provides a greater pool of local and regional government taxation revenue to spend on social and community infrastructure to the benefit of local residents.

Source: Urbis



COST ESTIMATES AND FEASIBILITY| CONCLUSIONS

KEY CONCLUSIONS

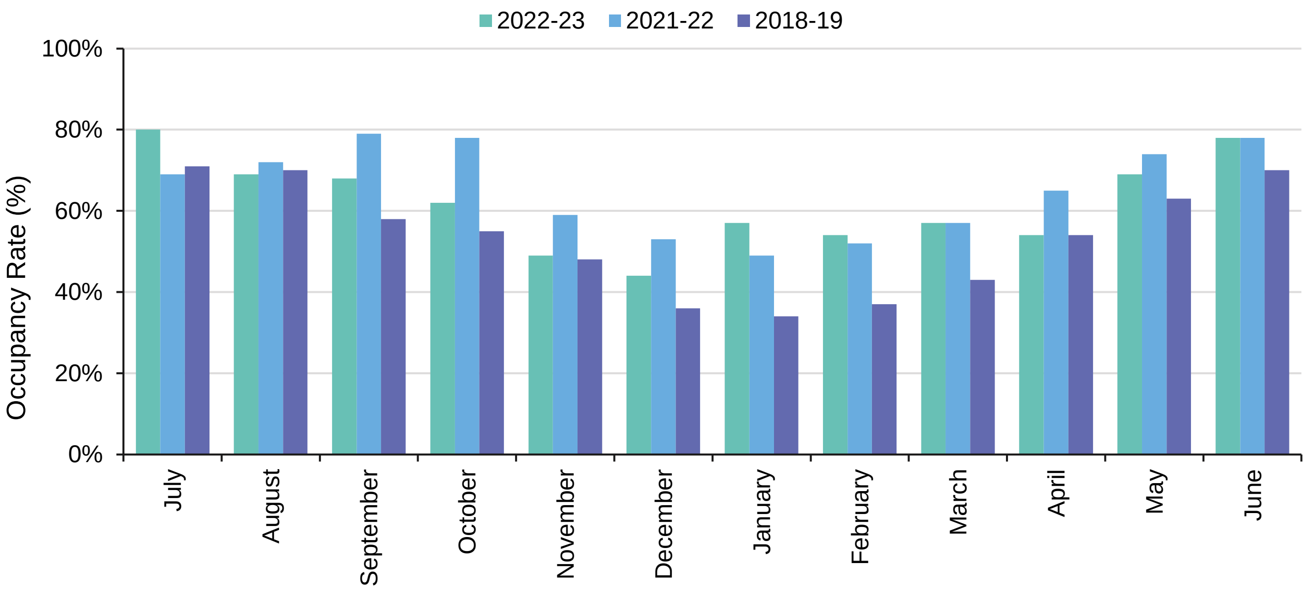
- The site is well located close to a range of amenities and offers a visitor accommodation option not currently available in Dampier / Karratha.
- While complex to design the site due to a number of constraints, some of these can be leveraged to offer a unique visitor experience.
- Elevated capital costs to construct either proposed development option remains a major challenge to development, which would make commercial viability of development prohibitive.
- Potential economic benefits are strong for both development options, with a cost-benefit analysis establishing positive economic activity an expansion in visitor night capacity increasing local tourism, hospitality and retail spend as well as considerable construction-phase value-add.

06

APPENDICES

ADDITIONAL DATA

Occupancy Rate by Month, Australia's North West, FY18/19 – FY22/23



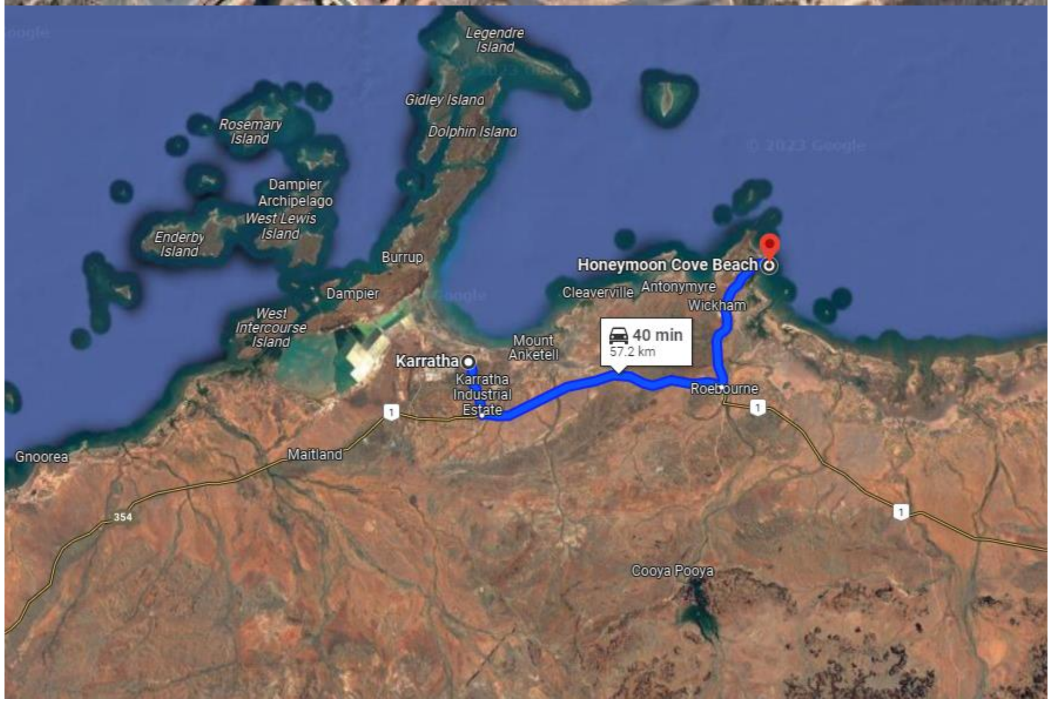
Source: STR, TourismWA

CASE STUDIES

CASE STUDIES | CASE STUDY 1 – SAMSON BEACH CARAVAN PARK

Relevance:
Smaller sized beachside caravan park catering to tourists. Small town location with amenities within walking distance

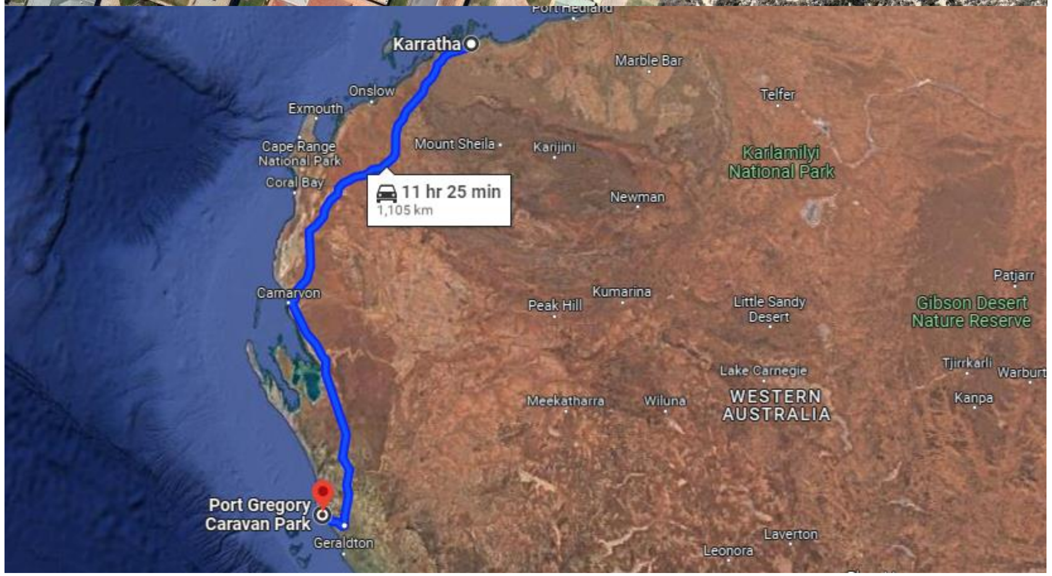
NAME	**Samson Beach Caravan Park**
LOCATION	10 Miller Cl, Point Samson WA 6720
LAND SIZE	1.75 ha
ACCOMMODATION YIELD AND PRICING	20 caravan bays - $55/day 15 chalets - $250.50/day
AMENITIES	▪ Free-Gas BBQ ▪ Tavern ▪ Bistro ▪ Store ▪ Public Toilets ▪ Laundry ▪ Fish Scaling Table ▪ Small pets allowed ▪ Pool
OWNER / OPERATOR	Privately owned
OPENING PERIODS	
COMMENTARY	▪ 40 minute drive east from Karratha ▪ Beachside location – ideal for tourism ▪ Small scale



CASE STUDIES | SAMSON BEACH CARAVAN PARK

Relevance:
Smaller sized beachside caravan park catering to tourists. Small town location, minimal amenities, low cost.

NAME	**Port Gregory Caravan Park**
LOCATION	13 Sanford St, Gregory WA 6535
LAND SIZE	1.3 ha
ACCOMMODATION YIELD AND PRICING	30 Powered sites $42/day 2 bed ensuite cabin $175/day 3 bed ensuite $195/day Ensuite cabin $150/day Ensuite cabin deluxe $150/day Queen ensuite cabin $135/day Standard cabin $120/day Total cabins: 39
AMENITIES	▪ Recreation room ▪ BBQ area ▪ Projector Screen ▪ Ablution block ▪ Campers kitchen ▪ Laundry ▪ Overflow area for extra parking ▪ Pets allowed
OWNER / OPERATOR	G’Day Parks
OPENING PERIODS	
COMMENTARY	▪ Halfway between Exmouth and Karratha ▪ Ocean views ▪ Port location – can be used for worker accommodation



CASE STUDIES | PORT GREGORY CARAVAN PARK

CASE STUDIES | CASE STUDY 3 – ONSLOW DISCOVERY PARKS

Relevance:
Large caravan park catering to workers and a small section for tourists. Worker focus detracts from tourist operations.

NAME
Onslow Discovery Parks

LOCATION
557 Beadon Creek Rd, Onslow WA 6710

LAND SIZE
6.1 ha

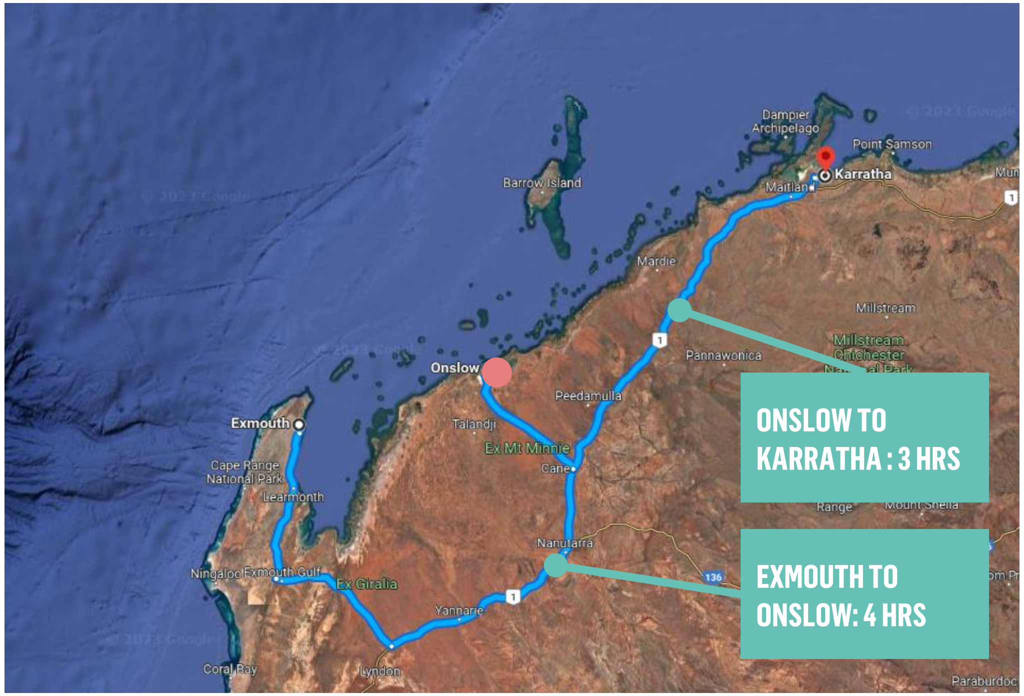
ACCOMMODATION YIELD AND PRICING
36 caravan sites - $54 / night
12 2-bed cabins $240-$300 / night
159 rooms/suites
Total yield: 207 accommodation spots

AMENITIES
- Activity Room
- BBQ
- Boat Ramp nearby
- Camp Kitchen
- Conference Facilities
- Gym
- Kiosk/Store
- Laundry
- Restaurant – Discovery Private Dining Waterfront
- Swimming Pool
- WiFi
- Dogs allowed

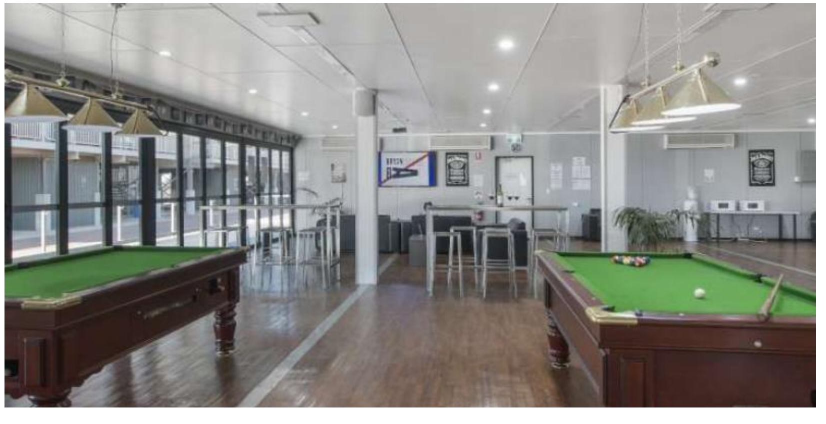
OWNER / OPERATOR
Discovery Parks

OPENING PERIODS

COMMENTARY
- Halfway between Exmouth and Karratha
- Ocean views
- Port location – worker accommodation



CASE STUDIES | ONSLOW DISCOVERY PARKS



CARAVAN AND CAMPING GROUNDS REQUIREMENTS

REGULATORY REQUIREMENTS | CARAVAN AND CAMPING GROUNDS REGULATIONS 1997

SCHEDULE 7 — CARAVAN PARKS AND CAMPING GROUNDS

[REGS. 17, 23, 34(3)(A), 39(2)(A) AND 40(2)(A).]

ITEM	DESCRIPTION	REFERENCE
General	▪ Only one caravan allowed on each site at any one time ▪ All caravans must be movable without disruption to any other occupiable site ▪ Tents may also be used on caravan sites ▪ An on-site caravan is to have a refrigerator and a stove	▪ Division 1 Pg. 62 (Pg. 72 of pdf)
Disability Access	▪ Caravan parks must be compliant with Part D3 of the Building Code (Access for People with Disabilities) in reference to **Class 3** buildings.	▪ Division 1 Pg. 63 (Pg. 73 of pdf)
Distance Minimums	▪ Caravan parks must comply with any further LGA-mandated distance minimums not in this document ▪ **Structures/Sites:** Minimum 3m between any buildings, camp and caravan sites ▪ **Internal Roads:** Minimum 1m between any buildings, camp or caravan sites and any facility road (unless otherwise approved) ▪ **External Roads:** Minimum 6m between any buildings, camp or caravan sites and land set aside for a state govt. road (unless otherwise approved) ▪ **Facility Boundary:** Minimum 1m between the facility boundary and any structure or camp/caravan site ▪ **Open-sided building near caravan:** 1m from others on same site, 1m from others on different site. ▪ **Building (non-open-sided) near caravan:** 2m from others on same site, 2m from others on different site. ▪ **Open-sided double carport:** 1m from caravan or other structures on different site. ▪ **Free-standing storage shed:** 2m from caravan or other building on different site. ▪ No open-sided double carport attached to caravan for occupants on another site. ▪ No minimum distance between caravan and en suite on the same site.	▪ Division 2 Pg. 64 (Pg. 74 of pdf)
Approved Buildings	▪ **If facility is a nature-based park:** manager's house, Class 10a buildings (*Building Code),* toilets, an ablution block, washing-up facilities, a carport or pergola, a storage shed, a camper's kitchen* (*if approved) ▪ **If facility is NOT a nature-based park:** manager's house, restaurant, shop, recreational facilities and any other buildings approved.	▪ Division 3 Pg. 65 (Pg. 75 of pdf)
Structure Size	▪ **Storage Sheds:** 6m² max area, 2.1m max height, lightweight material, one shed per nature-based park. ▪ **Fences:** Max height 1.2m, lightweight material or mesh, requires prior approval from facility license holder. ▪ No fences in set back area between a facility road and a caravan.	▪ Division 3 Pg. 67 (Pg. 77 of pdf)
Roads & Parking	▪ **Entrance Road:** Min 6m wide (unless otherwise approved by LGA). ▪ **One-way Facility Roads:** Min 4m wide (unless otherwise approved by LGA). ▪ **Two-way Facility Roads:** Min 6m wide (unless otherwise approved by LGA). ▪ **Carparks:** Requires 1 bay per 20 caravan sites on the facility with an absolute minimum of 4 bays allowed.	▪ Division 4 Pg. 68 (Pg. 78 of pdf)
Recreation Areas	▪ **At least 10%** of total facility area (excl. facility roads) must be recreational area. ▪ **2/3 of total** recreational area must be in one area (unless otherwise approved by LGA). ▪ **Childrens' Recreation:** Facility must include recreational facilities for children protected from weather. ▪ **Communal:** A communal building for communal/recreational activities is required.	▪ Division 5 Pg. 69 (Pg. 79 of pdf)

REGULATORY REQUIREMENTS | CARAVAN AND CAMPING GROUNDS REGULATIONS 1997 CON'T

SCHEDULE 7 — CARAVAN PARKS AND CAMPING GROUNDS

[REGS. 17, 23, 34(3)(A), 39(2)(A) AND 40(2)(A).]

ITEM	DESCRIPTION	REFERENCE
Ablution & Toilets	▪ Min 1 toilet and 1 shower within 90m of each site is required. ▪ Instead of each required 600 mm of urinal trough there may be a wall hung urinal or a pedestal toilet* (*if approved). ▪ **Non-nature and non-transit parks:** [see table 1 on following page] ▪ **Transit parks:** [see table 2 on following page] ▪ **Nature-based parks:** Min 2 toilets for every 20 sites required (unless otherwise approved). Number of showers and hand basins subject to approval. ▪ **Showers:** require dressing areas ▪ **Babies bath:** requires 45L capacity and to be made of stainless steel (or other suitable material) and is next to a min. 0.45m2 waterproof bench of at least 450mm width	▪ Division 6 Pg. 70-74 (Pg. 80-84 of pdf)
Laundry Facilities	▪ **No. of Sites / No. of laundry facilities** ▪ **Up to 60 Sites:** 1 per 20 sites ▪ **61-120 Sites:** 1 per 30 sites ▪ **Over 120 Sites**: 1 per 50 sites ▪ Requirements per laundry facility: Washing machine, trough with drain, min. 0.3m2 ironing bench, one electric dryer or 60m of washing line.	▪ Division 7 Pg. 75-76 (Pg. 85-86 of pdf)
Washing-up Facilities	▪ Min. 1 trough for washing of utensils for eating and cooking per 20 camp sites (unless otherwise approved for nature-based parks) ▪ Min. One washing trough within 90m of each camping site (unless otherwise approved for nature-based parks). ▪ Washing troughs are to be min. 45 L and next to a min. 0.45m2 waterproof bench.	▪ Division 8 Pg. 77 (Pg. 87 of pdf)
Water Utilities	▪ One tap within each 30m of each camping site required for camping grounds ▪ One tap connected to pot supply of water required within min. 10m of every short-stay site.	▪ Division 12 Pg. 79-80 (Pg. 89-90 of pdf)

REGULATORY REQUIREMENTS | TOILET & SHOWER REQUIREMENTS BY FACILITY TYPE

TABLE 1, NON-NATURE BASED AND NON-TRANSIT FACILITIES

NO. OF SITES	TOILETS			SHOWERS (NO. EACH SEX)	HAND BASINS (NO. EACH SEX)
	MALE		FEMALE		
	NO. PEDESTALS	URINAL TROUGH	NO. PEDESTALS		
1-10	1	600 mm	1	1	1
11-15	1	600 mm	2	2	2
16-20	2	600 mm	2	2	2
21-30	2	1,200 mm	3	3	3
31-40	3	1,200 mm	4	4	4
41-45	3	1,800 mm	5	5	5
46-50	4	1,800 mm	5	5	5

TABLE 2, TRANSIT CAMPS

NO. OF SITES	TOILETS			SHOWERS (NO. EACH SEX)	HAND BASINS (NO. EACH SEX)
	MALE		FEMALE		
	NO. PEDESTALS	URINAL TROUGH	NO. PEDESTALS		
1-10	1	0 mm	1	1	1
11-17	1	600 mm	1	1	1
18-20	2	600 mm	2	1	1
21-25	2	600 mm	2	2	2
26-34	2	1,200 mm	2	2	2
35-50	2	1,200 mm	3	2	2

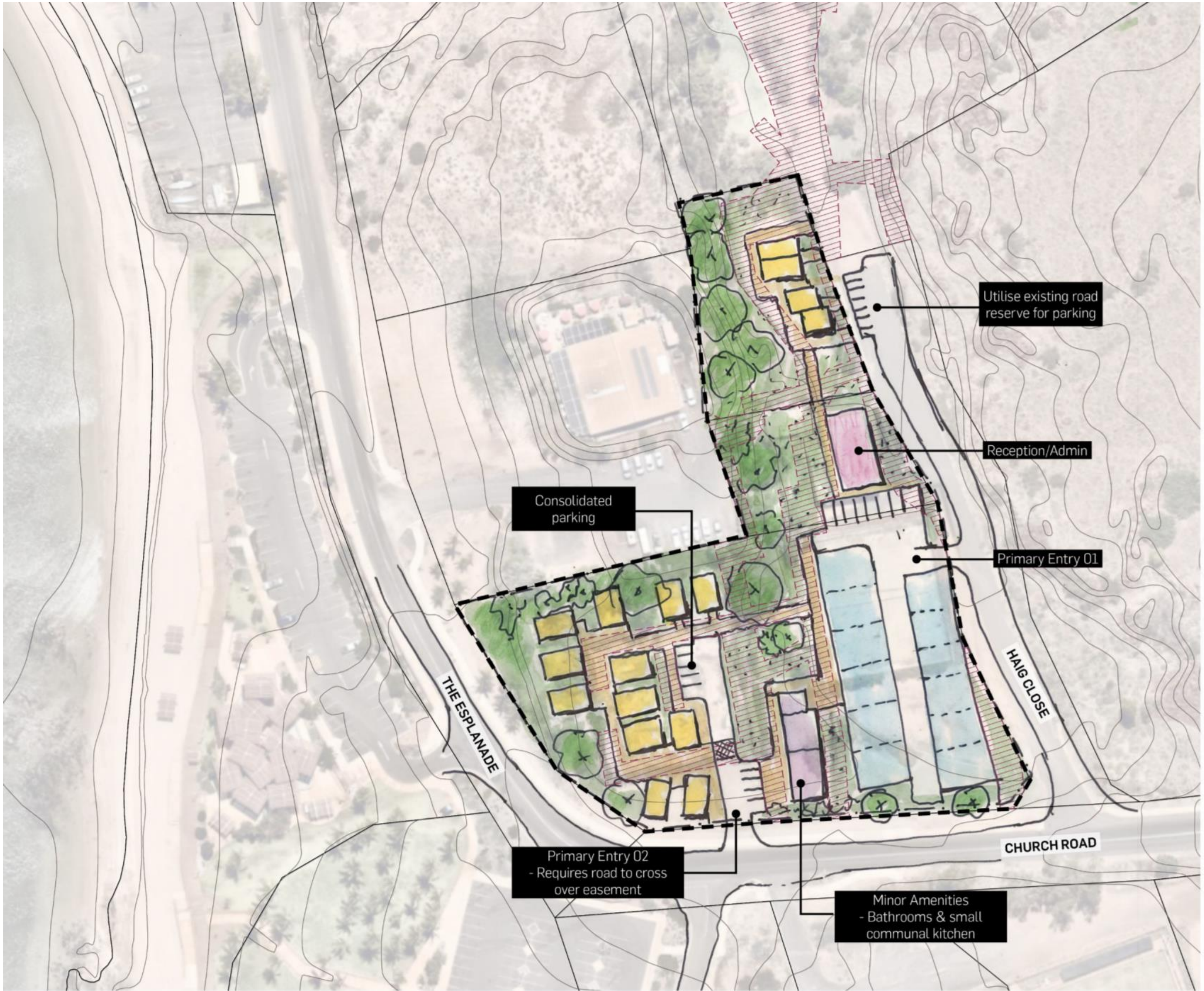
Source: Caravan Parks and Camping Grounds Regulations 1997

Note: Tables provided in Division 6 of Schedule 7 — Caravan parks and camping grounds [Regs. 17, 23, 34(3)(a), 39(2)(a) and 40(2)(a).] - pages 66-67 (76-77 of pdf). Nature-based park requirements detailed on prior page.

Note:
(a) a site with an en suite is not included;
(b) a site used by a caravan with ablution, toilet and laundry facilities is not included; and
(c) 2 camp sites are equal to one site.

WORKING CONCEPTS FOR WORKSHOP

WORKING CONCEPTS | CONCEPT 1 – NO DEVELOPMENT ON EASEMENTS



NOTES:

This option assumes no use of the easements for caravan sites or roads. Easements can be used for pedestrian movement or open space areas.

LEGEND:

- Subject Site
- Indicative extent of easements

Uses	Yield
Reception	187m² GFA
Amenities	195m² GFA
Chalets (2 bedroom)	14
Chalets (1 bedroom)	2
Caravan Site	12

WORKING CONCEPTS | **CONCEPT 2 – MAXIMISE YIELD**

NOTES:

This option assumes use of the easements for both caravan sites and roads.

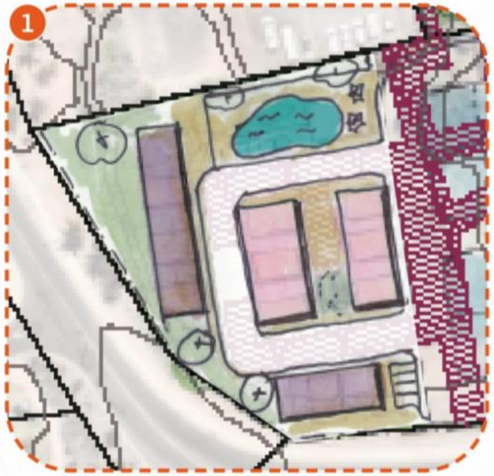
LEGEND:

- Subject Site
- Indicative extent of easements

Uses	Yield
Reception	**122m² GFA**
Amenities	**85m² GFA**
Chalets (2 bedroom)	11
Caravan Site	27

Alternative Typology - high yield

Uses	Yield
Reception	**122m² GFA**
Communal Amenities	**467m² GFA**
Pool & Outdoor rec	**360m²**
Caravan Site	27
2 storey walk-up buildings (2 bedroom units)	26



WORKING CONCEPTS | CONCEPT 3 - BALANCED

NOTES:

This option assumes use of the easements for roads only. Road surface treatments can vary based on easement function and requirements.

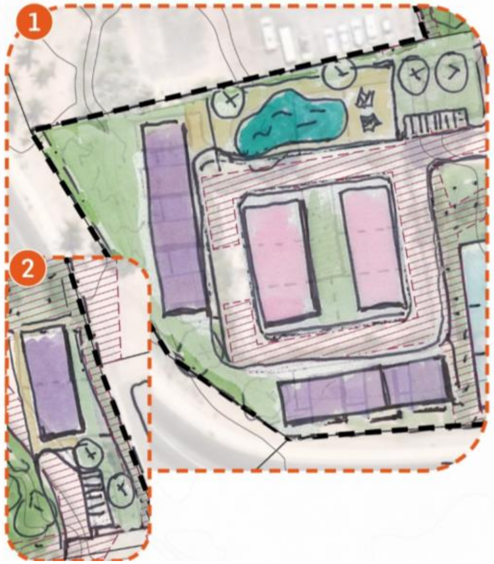
LEGEND:

- Subject Site
- Indicative extent of easements

Uses	Yield
Reception	187m² GFA
Amenities	85m² GFA
Chalets (2 bedroom)	7
Caravan Site	28

Alternative Typology - high yield

Uses	Yield
Reception	187m² GFA
Communal Amenities	467m² GFA
Pool & Outdoor Recreation	450m²
Caravan Site	18
2 storey walk-up buildings (2 bedroom units)	40



FEASIBILITY ASSUMPTIONS

FEASIBILITY ASSUMPTIONS

SEASONALITY	OCCUPANCY ASSUMPTION	
	Peak	Off-Peak
Proportion of Year (%)	46%	54%
Proportion of Year (Days)	168	197
Occupancy Rate (%)	82%	52%

OPERATING COSTS	COST PER YEAR PER UNIT	
	CARAVANS	CABINS
Housekeeping / staffing (2FTE + additional)	1 FTE additional per 10 sites @ 80k p.a	1 FTE additional per 3 sites @ 80k p.a
Utilities	$100	$500
Linens, toilet and kitchenette amenities	$200	$2,600

Booking fees	3%
Breakage and allocation to renovation	1%
Other Costs	4%
Marketing and promotion	8%

OPERATING REVENUE	PEAK PRICE PER NIGHT	OFF-PEAK PRICE PER NIGHT
Powered Caravan Sites	$68	$58
1 Bedroom Cabins	$320	$280
2 Bedroom Cabins	$375	$340

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

The data and information that informs and supports our opinions, estimates, surveys, forecasts, projections, conclusion, judgments, assumptions and recommendations contained in this report (Report Content) are predominantly generated over long periods, and is reflective of the circumstances applying in the past. Significant economic, health and other local and world events can, however, take a period of time for the market to absorb and to be reflected in such data and information. In many instances a change in market thinking and actual market conditions as at the date of this report may not be reflected in the data and information used to support the Report Content.

The recent international outbreak of the Novel Coronavirus (COVID-19), which the World Health Organisation declared a global health emergency in January 2020 and pandemic on 11 March 2020, has and continues to cause considerable business uncertainty which in turn materially impacts market conditions and the Australian and world economies more broadly.

The uncertainty has and is continuing to impact the Australian real estate market and business operations. The full extent of the impact on the real estate market and more broadly on the Australian economy and how long that impact will last is not known and it is not possible to accurately and definitively predict. Some business sectors, such as the retail, hotel and tourism sectors, have reported material impacts on trading performance. For example, Shopping Centre operators are reporting material reductions in foot traffic numbers, particularly in centres that ordinarily experience a high proportion of international visitors.

The data and information that informs and supports the Report Content is current as at the date of this report and (unless otherwise specifically stated in the Report) does not necessarily reflect the full impact of the COVID-19 Outbreak on the Australian economy, the asset(s) and any associated business operations to which the report relates. It is not possible to ascertain with certainty at this time how the market and the Australian economy more broadly will respond to this unprecedented event and the various programs and initiatives governments have adopted in attempting to address its impact. It is possible that the market conditions applying to the asset(s) and any associated business operations to which the report relates and the business sector to which they belong has been, and may be further, materially impacted by the COVID-19 Outbreak within a short space of time and that it will have a longer lasting impact than we have assumed. Clearly, the COVID-19 Outbreak is an important risk factor you must carefully consider when relying on the report and the Report Content.

Where we have sought to address the impact of the COVID-19 Outbreak in the Report, we have had to make estimates, assumptions, conclusions and judgements that (unless otherwise specifically stated in the Report) are not directly supported by available and reliable data and information. Any Report Content addressing the impact of the COVID-19 Outbreak on the asset(s) and any associated business operations to which the report relates or the Australian economy more broadly is (unless otherwise specifically stated in the Report) unsupported by specific and reliable data and information and must not be relied on.

To the maximum extent permitted by law, Urbis (its officers, employees and agents) expressly disclaim all liability and responsibility, whether direct or indirect, to any person (including the Instructing Party) in respect of any loss suffered or incurred as a result of the COVID-19 Outbreak materially impacting the Report Content, but only to the extent that such impact is not reflected in the data and information used to support the Report Content.

This report is dated **April 2024** and incorporates information and events up to that date only and excludes any information arising, or event occurring, after that date which may affect the validity of Urbis Pty Ltd's (Urbis) opinion in this report. Urbis prepared this report on the instructions, and for the benefit only, of **City of Karratha** (Instructing Party) for the purpose of a **Dampier Tourist Park Feasibility Report** (Purpose) and not for any other purpose or use. Urbis expressly disclaims any liability to the Instructing Party who relies or purports to rely on this report for any purpose other than the Purpose and to any party other than the Instructing Party who relies or purports to rely on this report for any purpose whatsoever (including the Purpose).

In preparing this report, Urbis was required to make judgements which may be affected by unforeseen future events including wars, civil unrest, economic disruption, financial market disruption, business cycles, industrial disputes, labour difficulties, political action and changes of government or law, the likelihood and effects of which are not capable of precise assessment.

All surveys, forecasts, projections and recommendations contained in or made in relation to or associated with this report are made in good faith and on the basis of information supplied to Urbis at the date of this report. Achievement of the projections and budgets set out in this report will depend, among other things, on the actions of others over which Urbis has no control.

Urbis has made all reasonable inquiries that it believes is necessary in preparing this report but it cannot be certain that all information material to the preparation of this report has been provided to it as there may be information that is not publicly available at the time of its inquiry.

In preparing this report, Urbis may rely on or refer to documents in a language other than English which Urbis will procure the translation of into English. Urbis is not responsible for the accuracy or completeness of such translations and to the extent that the inaccurate or incomplete translation of any document results in any statement or opinion made in this report being inaccurate or incomplete, Urbis expressly disclaims any liability for that inaccuracy or incompleteness.

This report has been prepared with due care and diligence by Urbis and the statements and opinions given by Urbis in this report are given in good faith and in the belief on reasonable grounds that such statements and opinions are correct and not misleading bearing in mind the necessary limitations noted in the previous paragraphs. Further, no responsibility is accepted by Urbis or any of its officers or employees for any errors, including errors in data which is either supplied by the Instructing Party, supplied by a third party to Urbis, or which Urbis is required to estimate, or omissions howsoever arising in the preparation of this report, provided that this will not absolve Urbis from liability arising from an opinion expressed recklessly or in bad faith.

Urbis acknowledges the important contribution that Aboriginal and Torres Strait Islander people make in creating a strong and vibrant Australian society.

We acknowledge, in each of our offices, the Traditional Owners on whose land we stand.

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Project code	P0049420
Report number	1.2

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