



Donnybrook-Balingup Economic Development & Tourism Strategy

Background Report

Report prepared for

Shire of Donnybrook-Balingup

April 2026



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lucid

/ˈluːsɪd/

adjective

1. expressed clearly; easy to understand

2. bright or luminous



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Lucid Economics acknowledges the Traditional Custodians and Elders of Country throughout Australia, and their connection to land, sea and community. We pay our respects to Aboriginal and Torres Strait Islander Elders past, present and emerging.

Executive Summary

Lucid Economics Pty Ltd (Lucid Economics) has been engaged by the Shire of Donnybrook-Balingup to create an Economic Development and Tourism Strategy.

This report contains a statistical evidence base to support the development of this strategy and utilises the most current and up-to-date information available.

Like many communities across Western Australia, the economy of Donnybrook-Balingup has been shaped by its past and continues to evolve. Agriculture remains the most significant industry, accounting for 30% of the economy. While agriculture is the dominant industry, as a sector it is diverse. While known for its apple production, which is significant, there are a wide range of agricultural products, including notable quantities of pears, cherries, pumpkins and nectarines as well as cattle and sheep.

While some limited quarrying activities still remain, mining has seen growth recently, mostly notably through the growth of the nearby Greenbushes Lithium–Tantalum Mine as well as the significant growth of a local fly-in/fly-out (FIFO) workforce that services the mines of the Pilbara. As the local mining sector has grown in the South West as well as the significant increase in population the wider region has experienced post-COVID, the construction industry has also grown recently.

Outside of these sectors, there are a raft of smaller sectors that, while relatively small, provide a diversified base of economic activity. There remains some limited timber-related manufacturing as well as small scale food production activities. Combined with a variety of mostly locally focused service sectors (i.e. healthcare, retail, education, public administration), these sectors round out the structure of the local economy.

Tourism has emerged into an important sector for the Shire, attracting just under 200,000 visitors per year who inject \$35.8 million into the local economy, which largely flows to locally owned small businesses. Tourism represents 4.6% of the total economy and 7.7% of total employment, making it the fifth most important employing sector in the Shire. While relatively small, tourism provides economic diversity and represents a key export from the Shire.

Population growth has been volatile (as it often is in Western Australia), however, overall population growth has been more post-COVID compared to the period directly before COVID. In smaller communities, population is an important growth stimulus for the local economy, increasing local household expenditure and demand for services. Interestingly, the data seems to indicate that the population growth over the last few years is based on workers choosing to live in the district, many of whom are likely associated with the mining sector.

As the population has increased, there has been a rise in building approvals, which will hopefully increase the supply of houses in the near future. Housing availability in the Shire is close to zero and is severely limited, which can stymie population growth, restricting what otherwise would be a driver of growth. Naturally, housing is constrained across the country, so the issue does not put the Shire at a competitive disadvantage, however, it remains a constraint on growth.

Based on the most recent Census data (2021), the population of the Shire is older and aging quickly, as the district has seen a decrease in families (i.e. children 14 and under and adults 35-54 years old) and a significant increase in people 65 and over. The more recent labour force data may show a potential shift in this trend, as there is anecdotal evidence of many mine workers moving to the South West with their families. The 2026 Census will provide further insights.

The analysis has demonstrated the significance of the agricultural sector but also a number of future considerations and opportunities to growth the local economy, including:

- Agriculture (range of crops and products)
- Value-adding to local agricultural production (further packaging, processing and food/beverage product manufacturing)
- Tourism (including accommodation and variety of commissionable experiences)
- Population growth (relocation of skilled workers and professionals to the area)

The data contained in this report and the identified areas for future economic growth will be tested and reviewed during the stakeholder engagement phase of the project.

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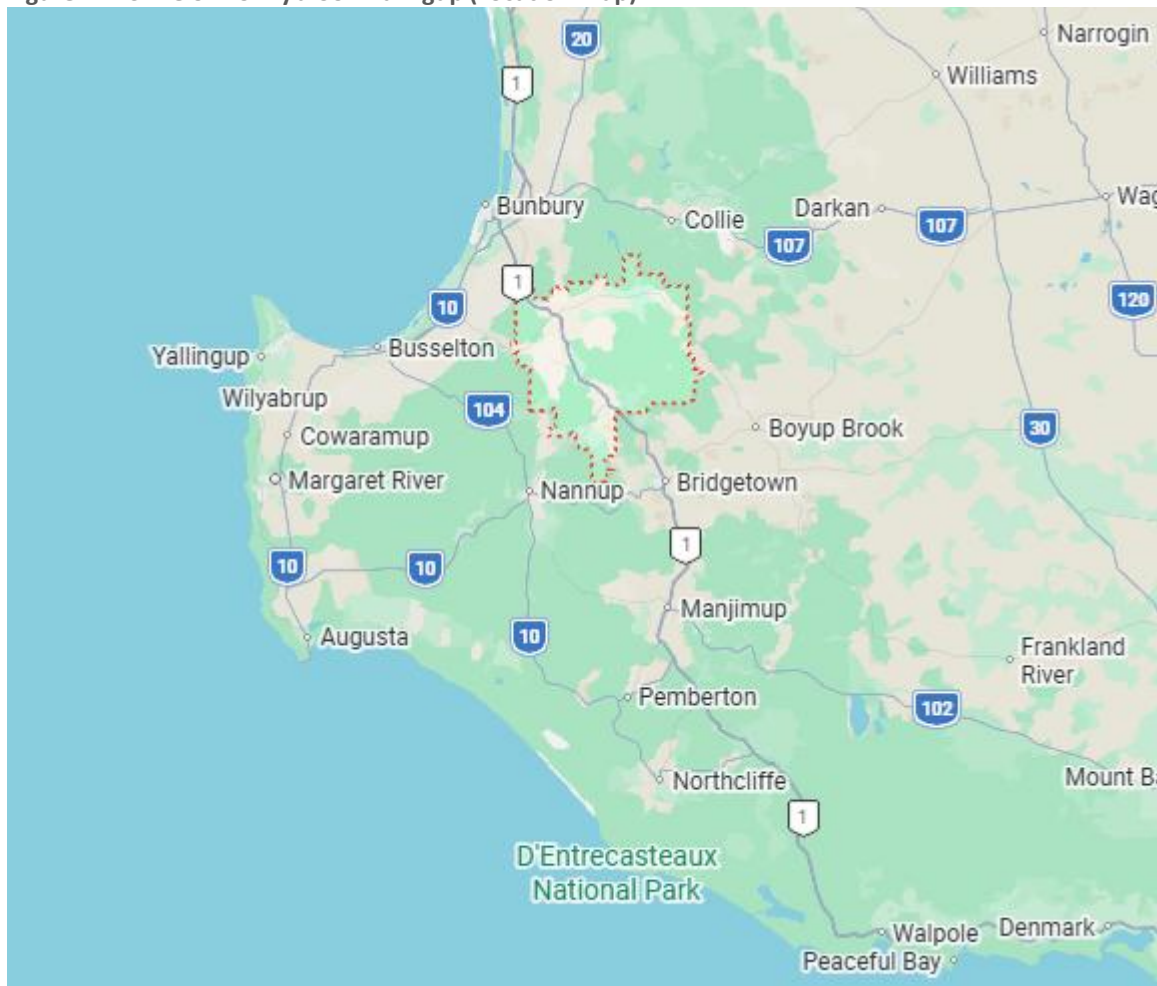
1. Introduction

Lucid Economics Pty Ltd (Lucid Economics) has been engaged by the Shire of Donnybrook-Balingup to provide an economic and community profile. This work will support and inform an updated Community Strategy Plan as well as future land use planning work across the Shire.

The Shire of Donnybrook-Balingup is located in the South West region of Western Australia, renowned as the apple capital of Western Australia given its fertile soils and perfect growing conditions.

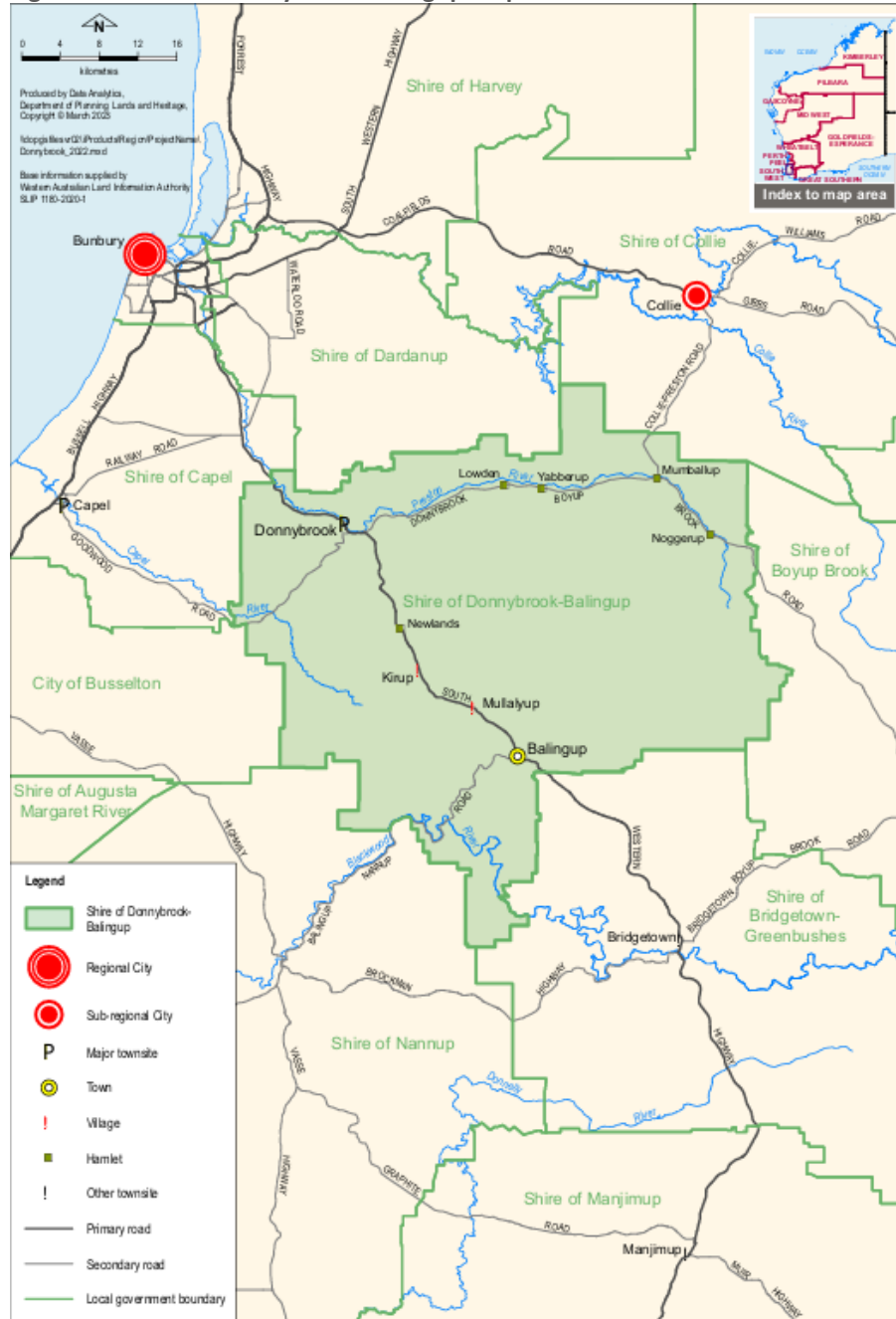
Centred around the township of Donnybrook, the Shire is situated approximately 200 kilometres south of Perth, making it around a two-hour drive. It also lies 40 kilometres south-east of Bunbury and 60km east of Busselton, providing residents and visitors with convenient access to major urban amenities while retaining a distinctive country charm. The area is celebrated for its great mix of produce, heritage and nature.

Figure 1.1. Shire of Donnybrook-Balingup (Location Map)



Source: Google Maps (2026).

Figure 1.2. Shire of Donnybrook-Balingup Map



Source: Shire of Donnybrook-Balingup (2026).

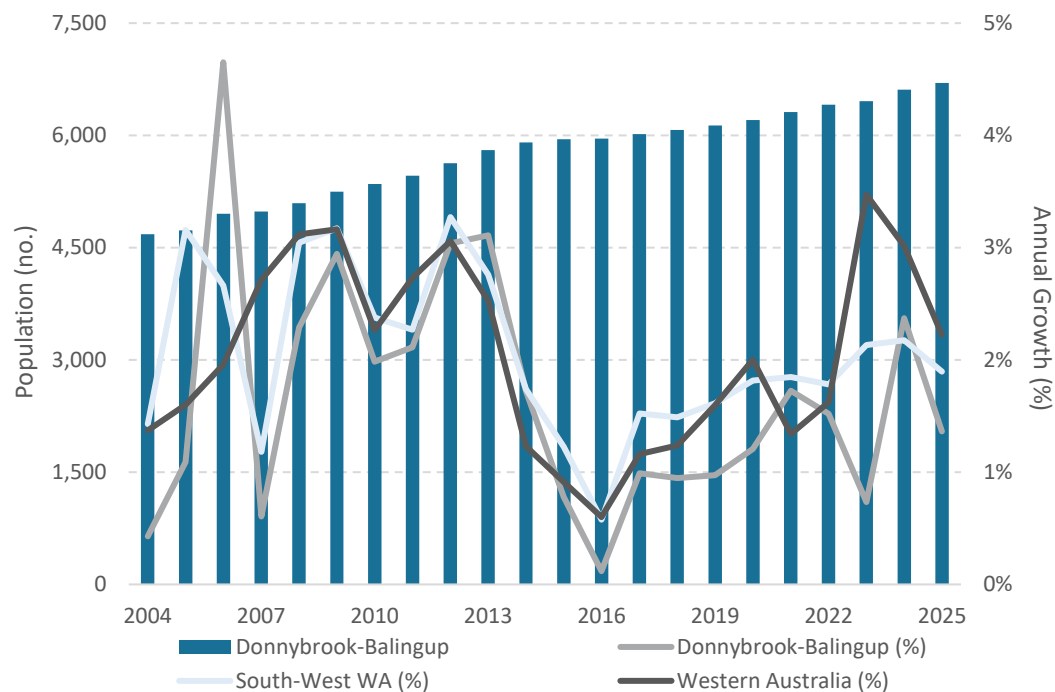
This report provides an updated and current understanding of the local economy and community. Any reference to Donnybrook-Balingup refers to the local government area of the Shire of Donnybrook-Balingup, unless otherwise noted.

2. Population & Demographics

2.1 Population

The Shire of Donnybrook-Balingup's population totalled 6,698 in June 2025, up 1.4% annually. While the Shire's average annual population growth in the decade prior to the COVID-19 pandemic (2009-2019) (1.6%) was marginally below both the South West WA Region¹ (1.9%) and Western Australian (1.7%) averages, Donnybrook-Balingup's population growth (average annual growth of 1.5%) has been further below the South West WA (1.9%) and state (2.3%) averages in the six years post-COVID.

Figure 2.1. Historical Population

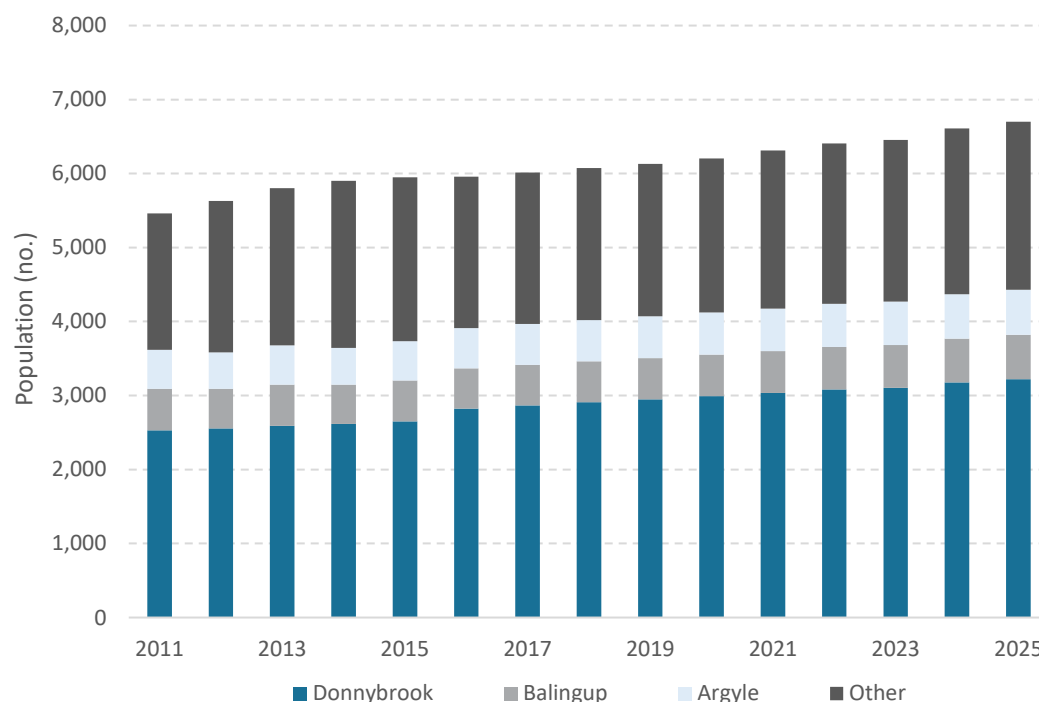


Source: ABS (2026).

¹ The South West WA region is made up of the Shire of Augusta-Margaret River, Shire of Boyup Brook, Shire of Bridgetown-Greenbushes, City of Bunbury, City of Busselton, Shire of Collie, Shire of Capel, Shire of Dardanup, Shire of Donnybrook-Balingup, Shire of Harvey, Shire of Manjimup and Shire of Nannup.

Figure 2.2 and Table 2.1 show the Shire's historical (and current) population by town or main settlement area. The analysis shows the dominance of the north-west of the LGA (Donnybrook and Argyle) as the main residential area.

Figure 2.2. Historical Population, Shire of Donnybrook-Balingup, by Town



Note: 'Other' includes the towns of Beelerup, Brookhampton, Kirup, Lowden, Mullalyup, Newlands, Upper Capel and Yabberup as well as other rural areas outside major towns. State suburb used for Donnybrook, Balingup and Argyle.
Source: ABS (2026); ABS (2022); Lucid Economics.

Table 2.1. Historical Population, Shire of Donnybrook-Balingup, by Town

	2011	2016	2021	2025
Donnybrook	2,532	2,824	3,035	3,221
Balingup	560	544	565	600
Argyle	526	545	575	610
Other	1,844	2,043	2,137	2,268
Donnybrook-Balingup	5,462	5,956	6,312	6,698

Note: 'Other' includes the towns of Beelerup, Brookhampton, Kirup, Lowden, Mullalyup, Newlands, Upper Capel and Yabberup as well as other rural areas outside major towns. State suburb used for Donnybrook, Balingup and Argyle.
Source: ABS (2026); ABS (2022); Lucid Economics.

According to WA Tomorrow's (2025) latest projections, the Shire of Donnybrook-Balingup's population is projected to reach just over 7,800 by the year 2036. This equates to an increase of 1,100 residents (or 17%) from the region's 2025 population. However, average annual population growth in Donnybrook-Balingup (1.4%) is projected to remain below the Western Australian (1.6%) average between 2025 and 2036.

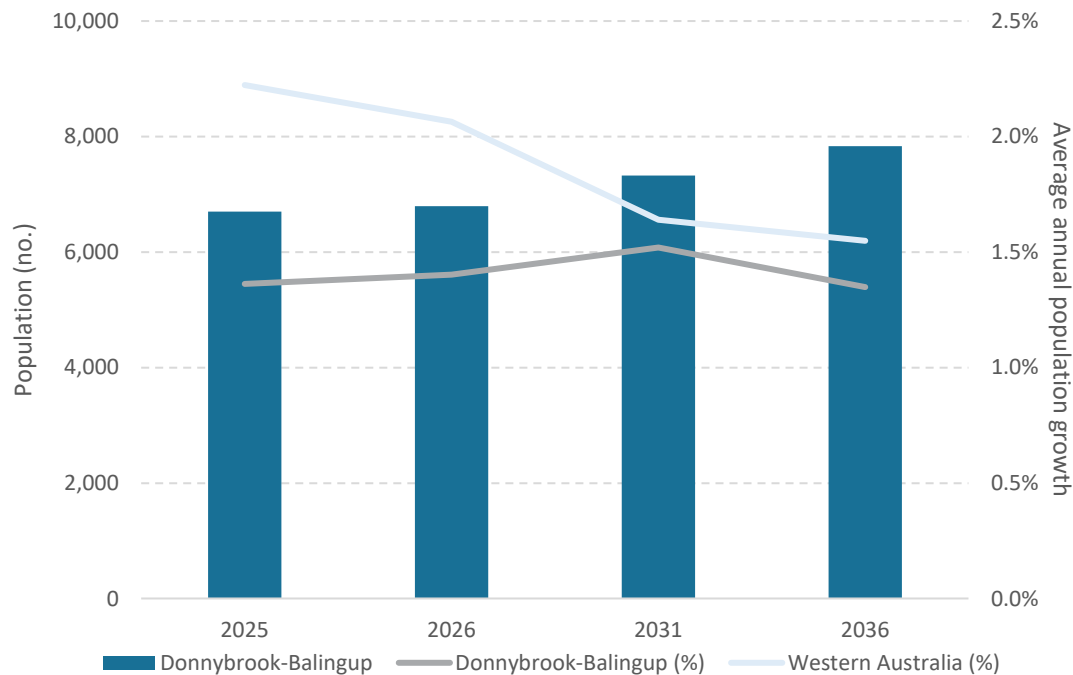
The following table (Table 2.2) shows a comparison of WA Tomorrow's forecast against historical growth and shows the projection is broadly in line with historical population growth trends. The future population growth will be dictated by continued strong demand in terms of population growth in the South West and available housing and land for future residential development in the region.

Table 2.2. Population Projection Comparison

	Average Annual Growth (%)
Historical Growth (15 year)	1.51%
WA Tomorrow (2021-2036)	1.42%

Source: ABS (2026); WA Tomorrow (2026); Lucid Economics.

Figure 2.3. Projected Population, WA Tomorrow



Sources: ABS (2026), WA Tomorrow (2026).

2.2 Age

In the year 2021 the Shire of Donnybrook-Balingup had a significantly higher median age (49 years) than the Western Australian median (38 years). This has been a consistent trend over the decade since 2011 when Donnybrook-Balingup's median age (44 years) was 8 years above the Western Australian (36 years) median.

Further, in 2021 Donnybrook-Balingup's median age was above all other LGAs in the South-West region except Nannup (56 years) and Bridgetown-Greenbushes (51 years) (Table 2.3).

Table 2.3. Median Age

	2011	2016	2021
Donnybrook-Balingup LGA	44	47	49
<i>South West WA:</i>			
Augusta-Margaret River	39	39	42
Boyup Brook	44	49	47
Bridgetown-Greenbushes	46	49	51
Bunbury	39	41	43
Busselton	39	42	45
Capel	34	36	38
Collie	39	41	44
Dardanup	35	37	40
Harvey	37	38	40
Manjimup	42	45	47
Nannup	49	53	56
Western Australia	36	36	38
<i>Perth</i>	<i>36</i>	<i>36</i>	<i>37</i>
<i>Rest of WA</i>	<i>37</i>	<i>39</i>	<i>40</i>

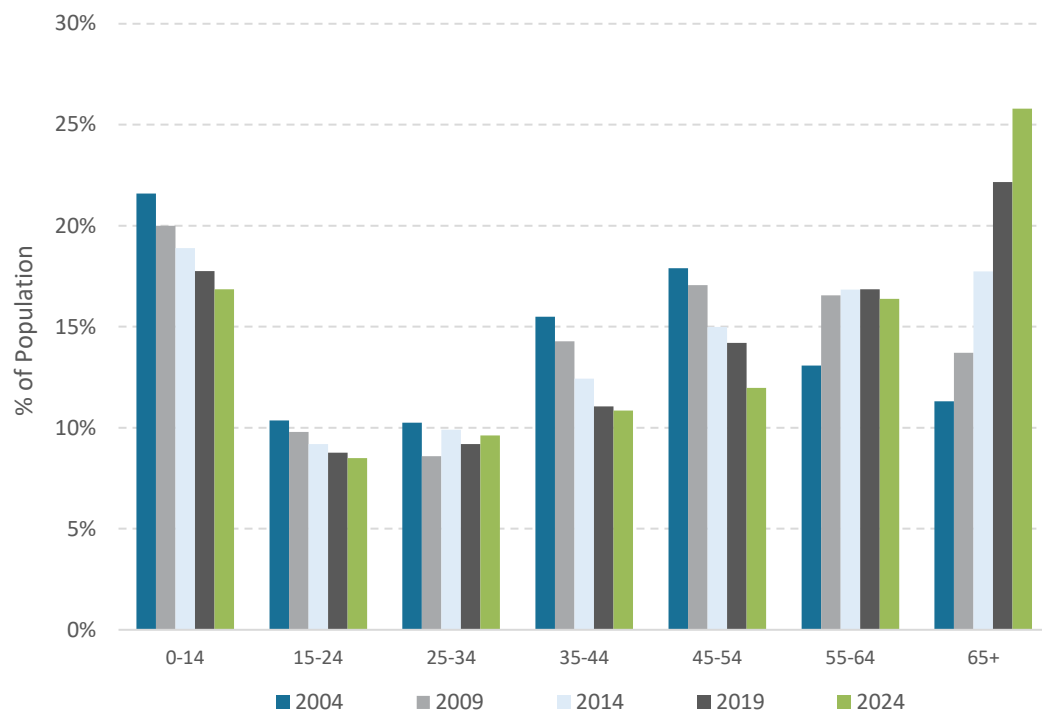
Source: ABS (2022).

The Donnybrook-Balingup LGA's population has gradually become older over the past two decades, with the proportion of residents aged 65 years and over rising from 11% in 2004 to 18% in 2014 and 26% in 2024. The data shows a falling proportion of persons aged 0-14 years, 35-44 years and 45-54 years, which suggests young families are becoming rarer in the region.

Table 2.4. Historical Age Structure, Donnybrook-Balingup LGA

Age Group	2004	2009	2014	2019	2024
0-14	22%	20%	19%	18%	17%
15-24	10%	10%	9%	9%	9%
25-34	10%	9%	10%	9%	10%
35-44	15%	14%	12%	11%	11%
45-54	18%	17%	15%	14%	12%
55-64	13%	17%	17%	17%	16%
65+	11%	14%	18%	22%	26%

Source: ABS (2026a).

Figure 2.4. Historical Population by Age, Donnybrook-Balingup LGA

Source: ABS (2026a).

2.3 Income

The Shire of Donnybrook-Balingup's median weekly personal (\$658) and household (\$1,332) income levels were both much lower than the state medians (\$848 and \$1,815) in 2021.

Median household income² is an important measure for standard of living. On a slightly more positive note, household income in Donnybrook-Balingup has grown at a slightly faster rate (average of 2.9% per annum) than the State median (2.6%) over the five years to 2021. However, the median household income in Donnybrook-Balingup is generally in line with other LGAs in the South-West.

While this situation is not perfect, household income levels in Donnybrook-Balingup have increased faster than the rate of inflation from 2016-2021 (average of 1.5% per annum), providing real income gains for residents, which often translates into increases in their standard of living. However, the high inflation environment since 2021 would likely have had a significant and material impact on the standard of living in the region since 2021.

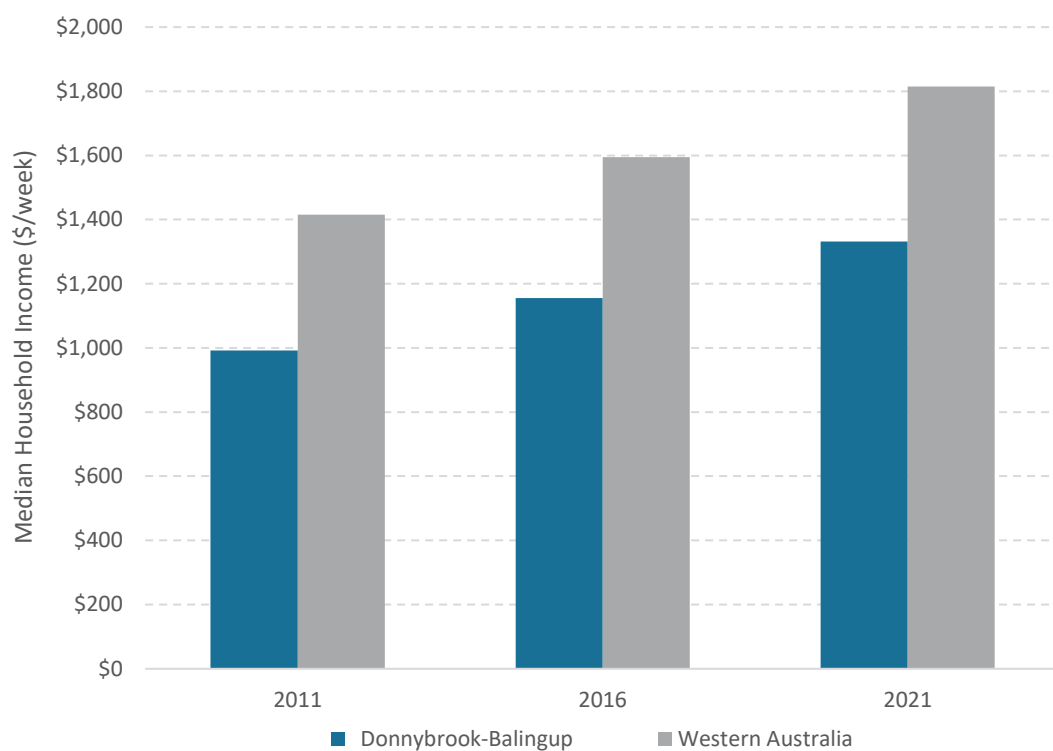
² The average (or mean) sums all values and divides by the count, representing total distribution, while the median is the exact middle value in a sorted list, representing the centre point, making it better for skewed data (like income or house prices) as it's less affected by extreme outliers.

Table 2.5. Median Income

	2011	2016	2021
<i>Personal income (\$/week)</i>			
Donnybrook-Balingup LGA	\$497	\$563	\$658
<i>South West WA:</i>			
Augusta-Margaret River	\$593	\$671	\$785
Boyup Brook	\$495	\$600	\$705
Bridgetown-Greenbushes	\$467	\$518	\$621
Bunbury	\$582	\$632	\$725
Busselton	\$556	\$653	\$751
Capel	\$664	\$716	\$831
Collie	\$557	\$512	\$591
Dardanup	\$637	\$670	\$777
Harvey	\$603	\$662	\$773
Manjimup	\$492	\$594	\$675
Nannup	\$456	\$515	\$581
Western Australia	\$662	\$724	\$848
<i>Household income (\$/week)</i>			
Donnybrook-Balingup LGA	\$992	\$1,155	\$1,332
<i>South West WA:</i>			
Augusta-Margaret River	\$1,099	\$1,285	\$1,529
Boyup Brook	\$882	\$1,096	\$1,265
Bridgetown-Greenbushes	\$881	\$1,024	\$1,218
Bunbury	\$1,139	\$1,197	\$1,326
Busselton	\$1,078	\$1,300	\$1,459
Capel	\$1,624	\$1,726	\$1,949
Collie	\$1,338	\$1,161	\$1,234
Dardanup	\$1,504	\$1,546	\$1,746
Harvey	\$1,463	\$1,553	\$1,788
Manjimup	\$821	\$955	\$1,094
Nannup	\$912	\$1,118	\$1,211
Augusta-Margaret River	\$992	\$1,155	\$1,332
Western Australia	\$1,415	\$1,595	\$1,815

Source: ABS (2022).

Figure 2.5. Median Household Income (\$/week)



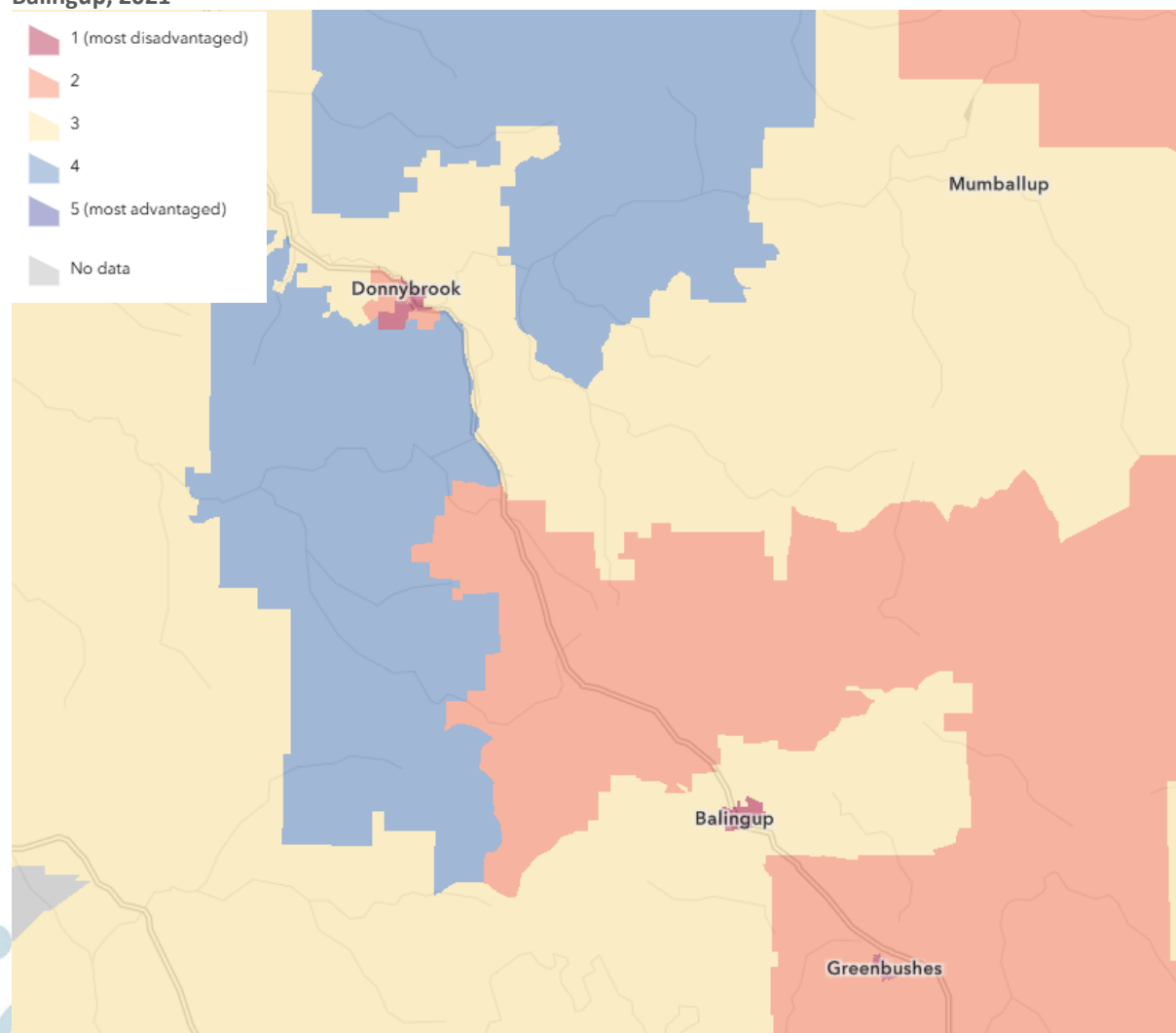
Source: ABS (2022).

2.4 SEIFA

The Socio-Economic Indexes for Areas (SEIFA) is a relative measure developed by the Australian Bureau of Statistics (ABS) to compare the socio-economic conditions of different communities, showing how areas compare against one another rather than assigning an absolute benchmark of wellbeing. It brings together a broad range of economic and social indicators that collectively reflect advantage and disadvantage, including household income levels, employment and unemployment, educational attainment, occupational skill levels, housing characteristics and access to resources. Because SEIFA is constructed from this mix of demographic, social and economic variables, an area's score is best interpreted in relation to others. Some areas will show more relative advantage while others show less, illustrating patterns of socio-economic condition allowing for comparison of one region to another.

The image below (Figure 2.6) shows the major population centres within the Shire of Donnybrook-Balingup in the bottom and second bottom quintiles of the ABS's Index of Relative Socio-Economic Advantage and Disadvantage, which indicates that these areas suffer from socio-economic disadvantage. However, there are also large regions (although sparsely populated) to the south and north-east of Donnybrook in the second highest quintile.

Figure 2.6. Index of Relative Socio-Economic Advantage & Disadvantage (by SA1), Shire of Donnybrook-Balingup, 2021



Source: ABS (2023).

Table 2.6. Index of Relative Socio-Economic Advantage & Disadvantage (by LGA), 2021

	Score	Ranking within Australia			Ranking within Western Australia		
		Rank	Decile	Percentile	Rank	Decile	Percentile
Donnybrook-Balingup LGA	961	316	6	58	71	6	51
<i>South-West WA:</i>							
Augusta-Margaret River	999	423	8	78	104	8	75
Boyup Brook	969	344	7	63	77	6	56
Bridgetown-Greenbushes	962	318	6	59	72	6	52
Bunbury	921	140	3	26	28	3	21
Busselton	985	396	8	73	96	7	69
Capel	982	387	8	71	91	7	66
Collie	872	52	1	10	11	1	8
Dardanup	961	314	6	58	69	5	50
Harvey	960	304	6	56	66	5	48
Manjimup	928	169	4	31	31	3	23
Nannup	955	286	6	53	60	5	43

Scores: a lower score indicates that an area is relatively disadvantaged compared to an area with a higher score. Scores should only be used in distributive analysis.

Ranks: all areas are ordered from the lowest to highest score, then the area with the lowest score is given a rank of 1, the area with the second lowest score is given a rank of 2 and so on.

Deciles: all areas are ordered from lowest to highest score, the lowest 10% of areas are given a decile number of 1 and so on, up to the highest 10% of areas which are given a decile number of 10. This means that areas are divided up into ten groups, depending on their score. Decile 1 is the most disadvantaged relative to the other deciles. Note that the area-based deciles in this data contain an equal number of areas, not people.

Percentiles: all areas are ordered from lowest to highest score, the lowest 1% of areas are given a percentile number of 1 and so on, up to the highest 1% of areas which are given a percentile number of 100. This means that areas are divided up into one hundred groups, depending on their score. Percentile 1 is the most disadvantaged relative to the other percentiles. Note that the area-based percentiles in this data contain an equal number of areas, not people.

Source: ABS (2023).

Generally speaking, the Shire enjoys a relatively similar socio-economic position compared to surrounding regions, showing the homogenous nature of the South-West WA region. However, as demonstrated in Figure 2.6 there are discrepancies within the broader region showing a range of socio-economic conditions.

3. Economic Profile

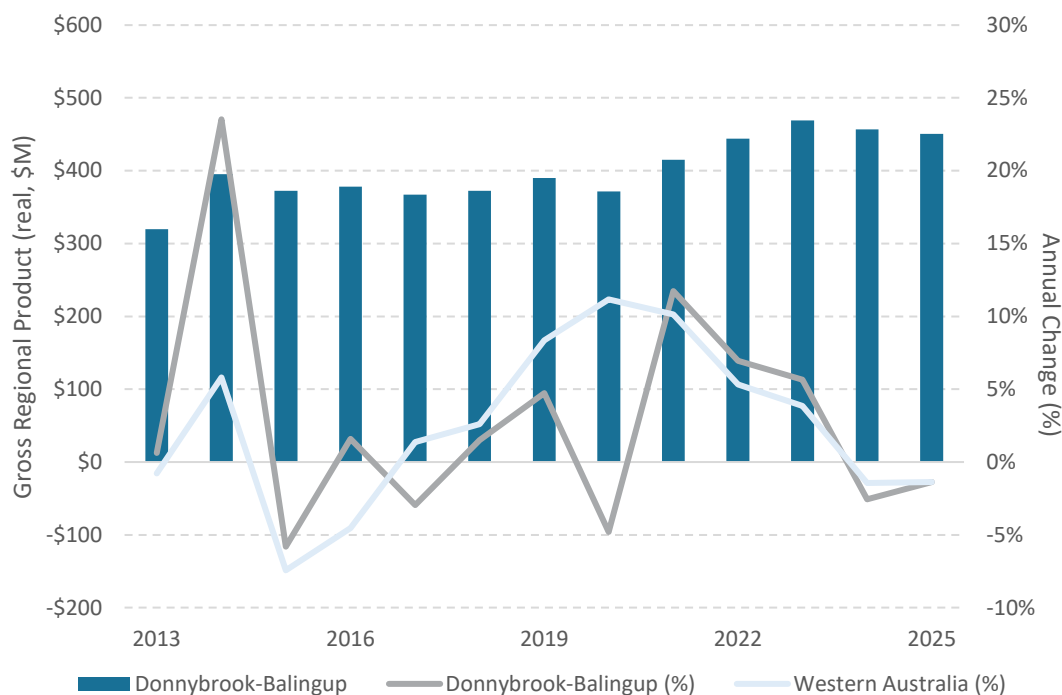
3.1 Size and Structure of the Economy

The Shire of Donnybrook-Balingup's Gross Regional Product (GRP) was \$450.6 million in 2024-25, down 1.4% from the previous year (Figure 3.1).

Donnybrook-Balingup's economy has been volatile over the last 12 years. This volatility is caused by the various key sectors of the economy, including agricultural, mining and construction. These sectors have experienced large swings (up and down). These industries are also largely unrelated so their movements are often independent of each other.

The agriculture, mining and construction industries are volatile by nature, being highly exposed to changes in local demand (construction and tourism), changes in international trade, the exchange rate, weather conditions and other macroeconomic factors that are outside the control of these industries.

Figure 3.1. Gross Regional Product, Donnybrook-Balingup



Note: Year-ending June data. Figures measured in constant June 2024 prices.

Source: REMPLAN (2026).

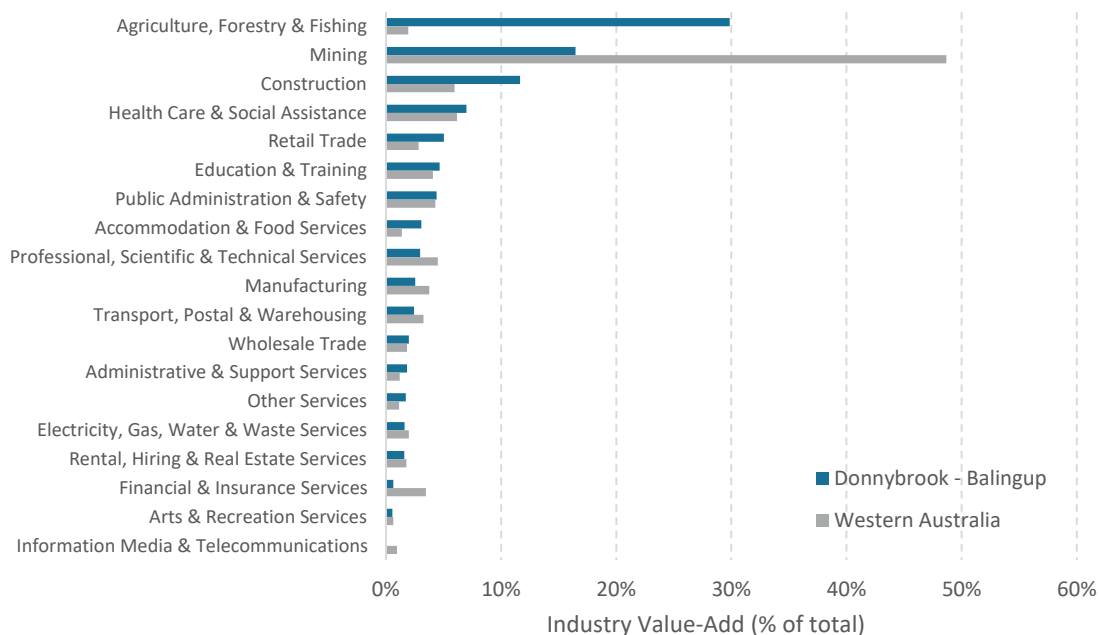
The largest industries by Industry Value-Add (IVA) in the Shire of Donnybrook-Balingup in 2024-25 were:

- Agriculture;
- Mining;
- Construction;
- Health care; and
- Retail trade.

Agriculture was by far the largest industry in Donnybrook-Balingup in 2023-24, accounting for 30% of total IVA.

Mining (16% of IVA) and Construction (up 12% of IVA) were the next largest industries in the region, with these three industries combining for almost 60% of the region's total IVA.

Figure 3.2. Industry Value-Add, 2024-25



Source: REMPLAN (2026).

3.2 Business Counts

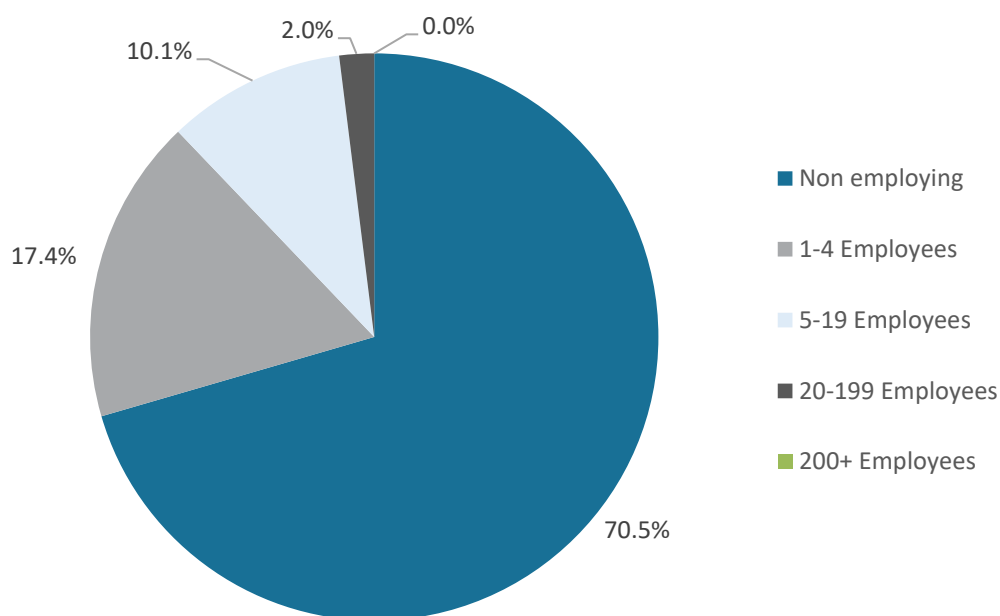
The Shire of Donnybrook-Balingup's economy is dominated by small businesses (98.0% of all businesses have 19 employees or fewer) (Figure 3.3). This structure is similar to most local economies in Australia.

The four top industries by number of businesses (agriculture, construction, professional services and real estate services) are typical industries where there is a great number of individual traders and small businesses.

Business Counts from the ABS

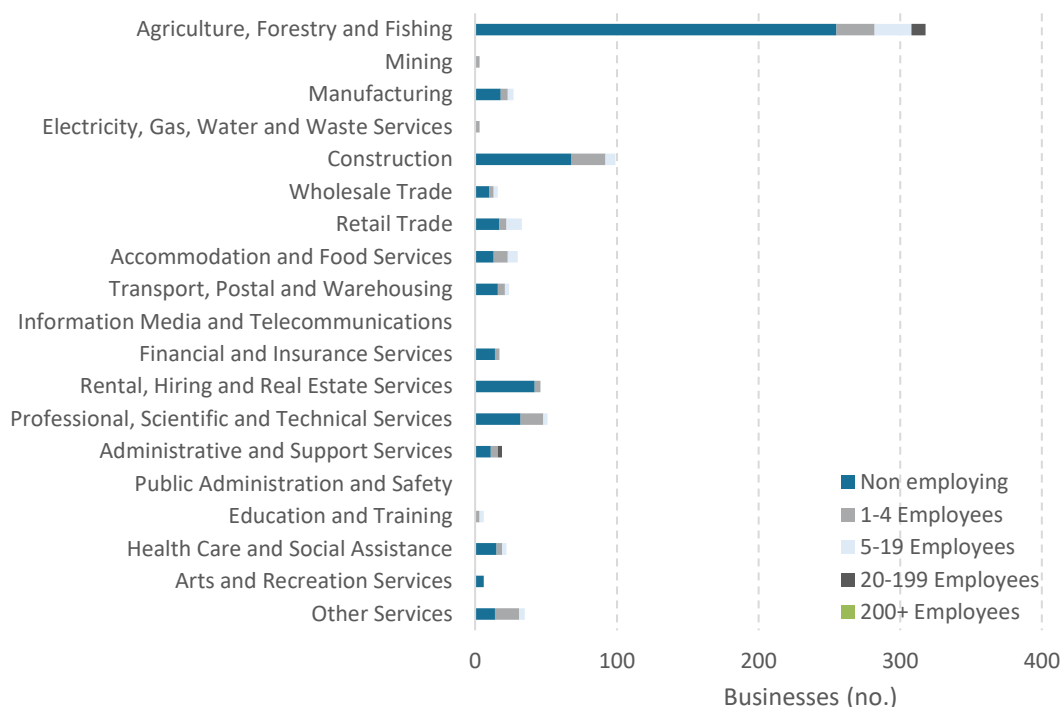
It is important to keep in mind that this data reflects the registered business address of companies (only), so larger businesses such as Coles, Woolworths and other major retail businesses may not be captured in the data. Furthermore, the ABS excludes sole traders and focuses on businesses with active ABNs that are registered for GST. This methodology usually underestimates the total number of businesses in a local economy, specifically many of the sole traders and/or home-based businesses.

Figure 3.3. Business Counts, Donnybrook-Balingup, 2024



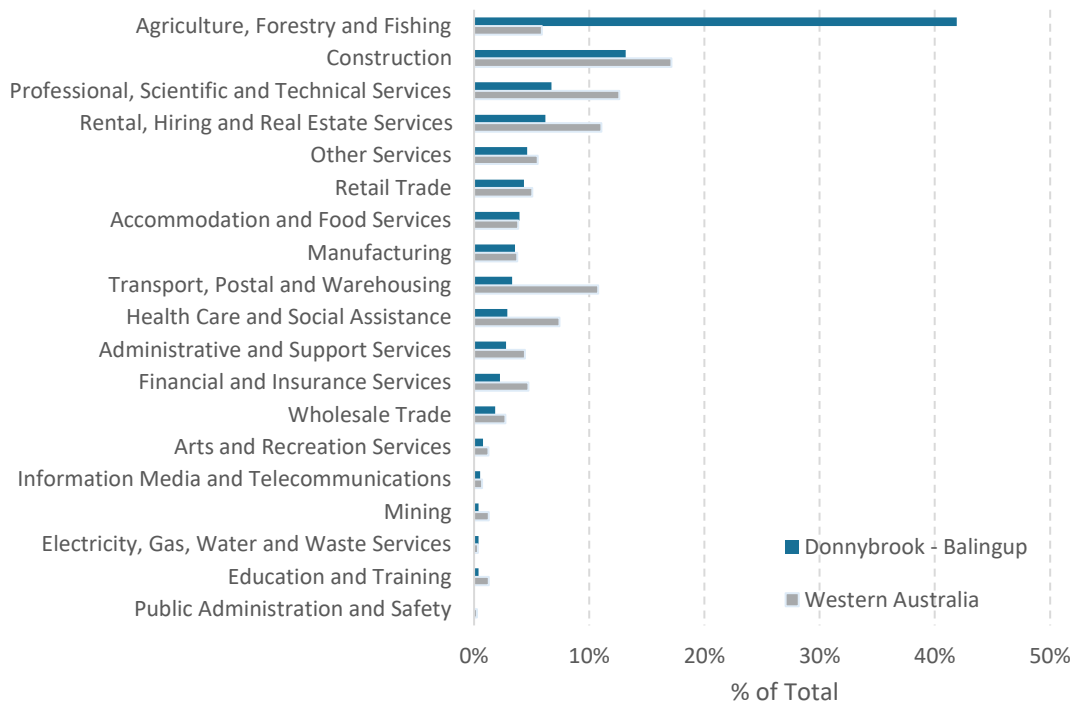
Source: ABS (2026b).

Figure 3.4. Business Counts by Industry, Donnybrook-Balingup, 2025



Source: ABS (2026b).

Figure 3.5. Business Counts, by Industry, 2025

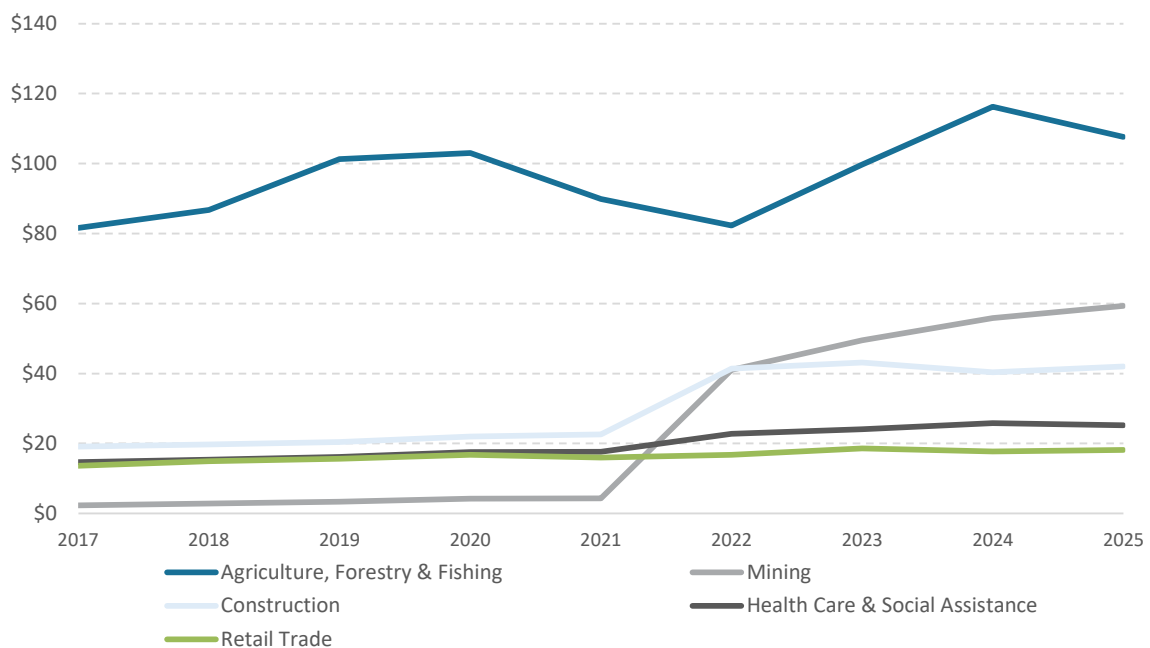


Source: ABS (2026b).

3.3 Key Industries

While Donnybrook-Balingup's overall economy has been largely stagnant in recent years, the region's key industries have grown reasonably strongly, particularly agriculture, mining and construction.

Figure 3.6. Top 5 Industries by Value-Add, Donnybrook-Balingup



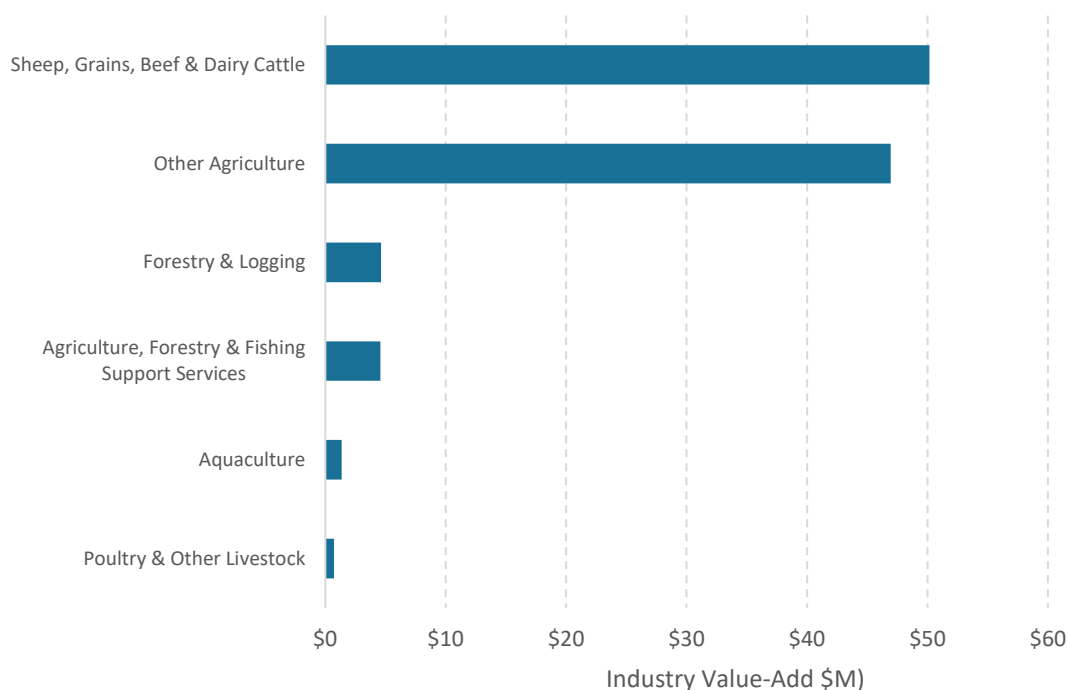
Source: REMPLAN (2026).

3.3.1 Agriculture

Agriculture is the largest industry in the region, accounting for 30% of Donnybrook-Balingup's IVA and 26% of employment in 2024-25.

Sheep, grain, beef and cattle are the key agricultural commodities in the region, although there is also significant apple and avocado production industries in the region.

Figure 3.7. Agriculture IVA by Sub-Industry, Donnybrook-Balingup, 2024-25



Source: REMPLAN (2026).

Table 3.1. Main Agricultural Products, Donnybrook-Balingup

Agricultural Product	2020-21 Production	% of Western Australia
Pears (t)	3,613	84%
Cherries (t)	32	31%
Apples (t)	7,298	26%
Pumpkins (t)	2,787	17%
Nectarines (t)	437	15%
Tomatoes (t)	1,060	7%
Peaches (t)	95	6%
Beans (t)	24	5%
Olives (t)	355	3%
Grapes for Wine (t)	1,020	2%
Avocados (t)	395	2%
Cattle (no.)	17,425	0.817%
Sheep and Lambs (no.)	23,726	0.187%

Source: ABS (2022a).

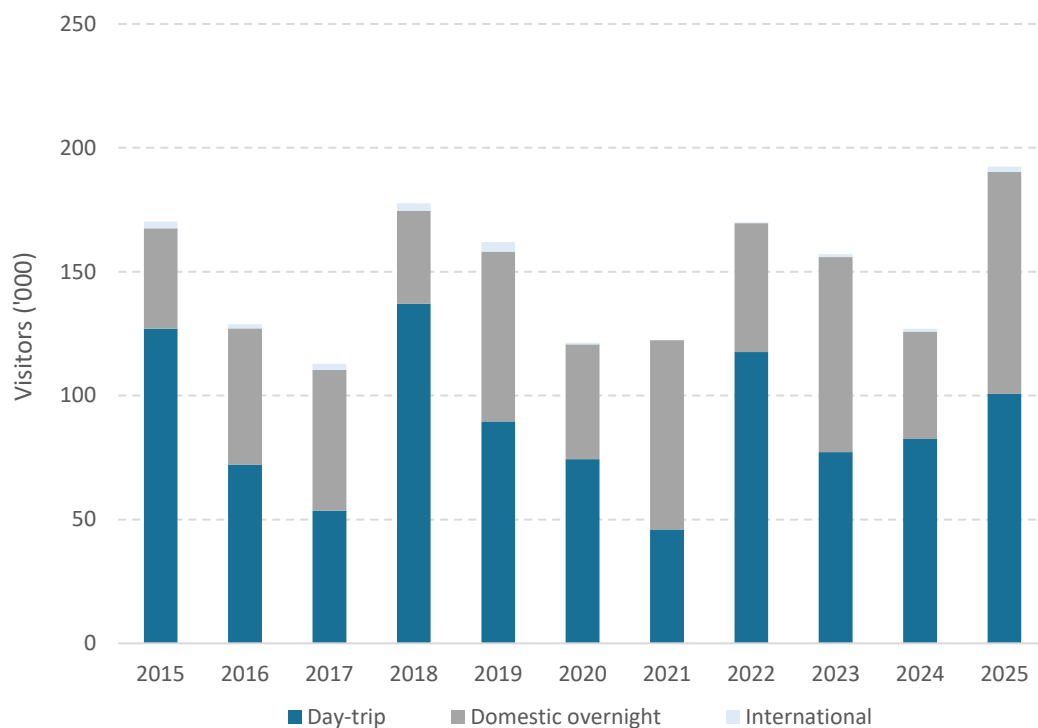
3.3.2 Tourism

The Donnybrook-Balingup local government area is renowned for its orchard countryside, premium wineries, and family-friendly attractions. Top spots include the Apple Fun Park, Golden Valley Tree Park, and several local wineries.

The region experienced a sharp rebound in tourism visitation in 2022 after soft visitation in 2020 and 2021. However, after 2022 visitation to the region trended lower before strong growth in 2025. It should be noted that the data from 2015 to 2024 is based on Tourism Research Australia's (TRA) National and International Visitor Surveys, while data in 2025 is based on TRA's Domestic Tourism Statistics (DoTs) data.

The primary reasons for visiting the region are for 'Holiday' or 'Visiting friends and relatives', while the region's proximity to Perth makes it a significant source market of visitors.

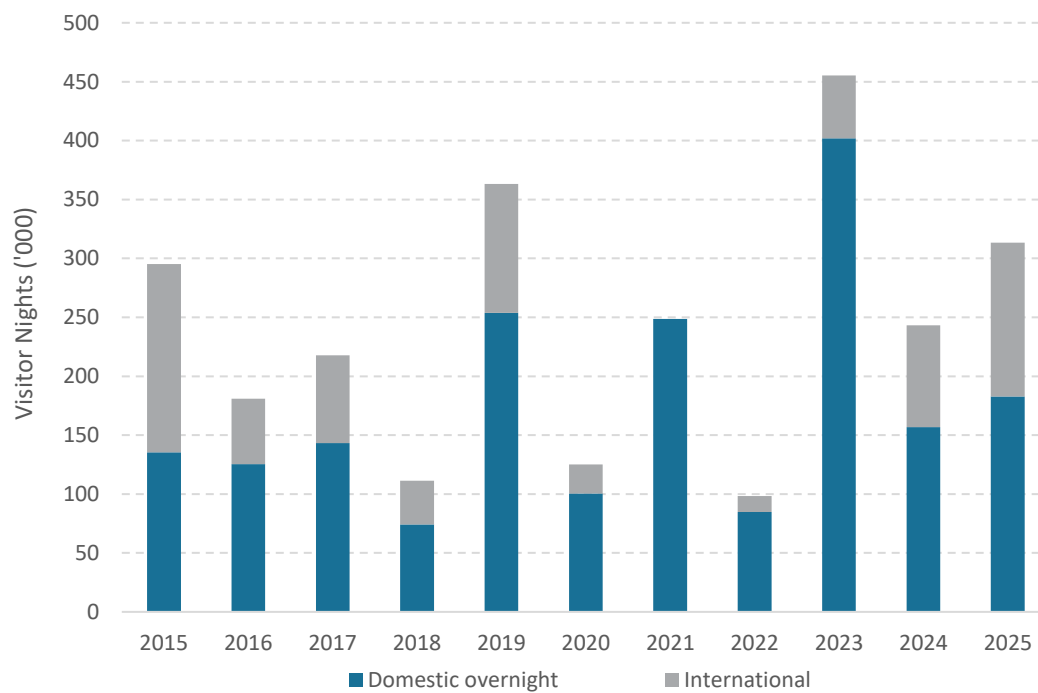
Figure 3.8. Visitation by Type, Donnybrook-Balingup



Note: Calendar year data. Sample sizes are low, figures should be considered indicative. NVS and IVS data used from 2025-2024. DoTs data used for 2025.

Source: TRA (2026).

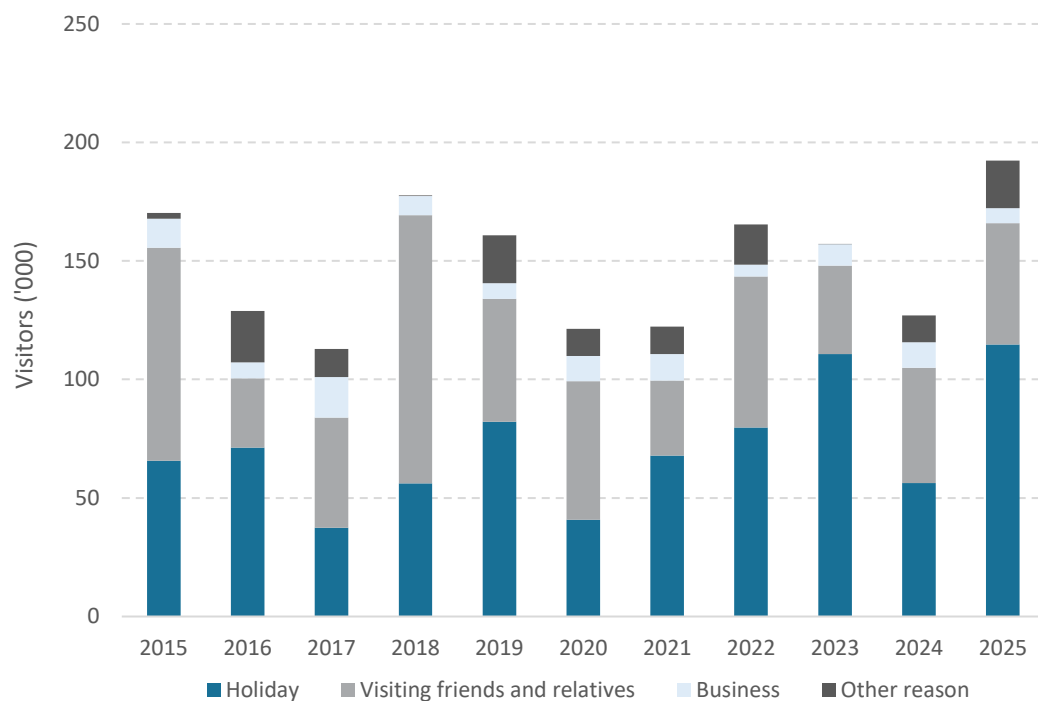
Figure 3.9. Visitor Nights by Type, Donnybrook-Balingup



Note: Calendar year data. Sample sizes are low, figures should be considered indicative. NVS and IVS data used from 2025-2024. DoTs data used for 2025.

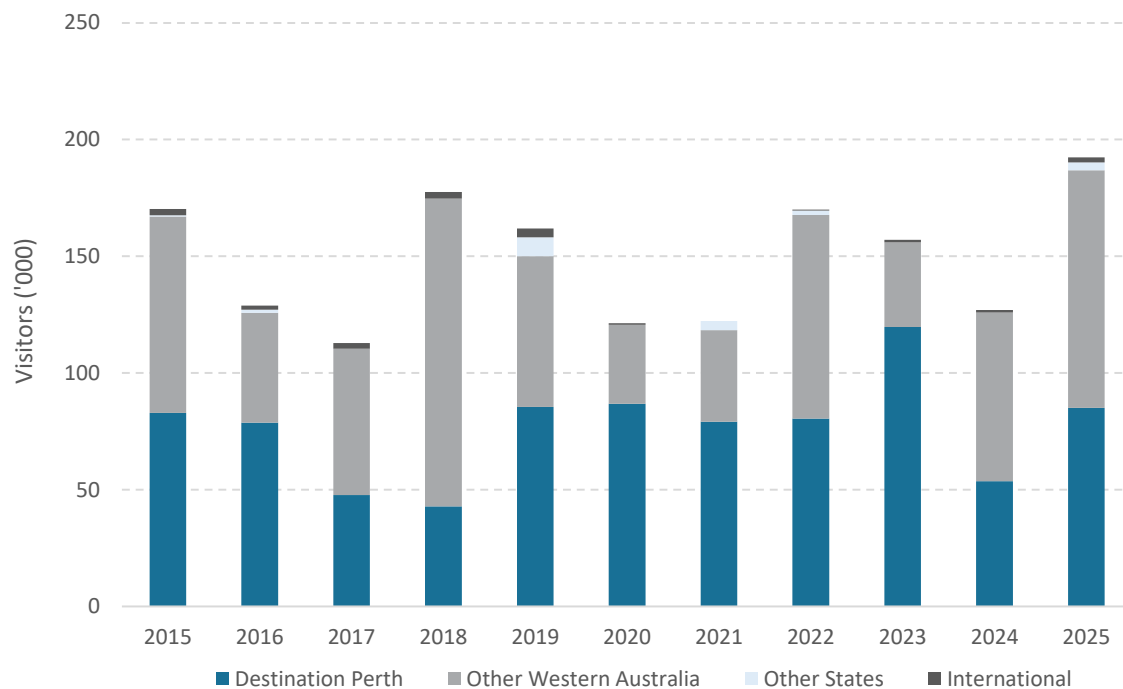
Source: TRA (2026).

Figure 3.10. Visitors by Purpose of Visit, Donnybrook-Balingup



Note: Calendar year data. Sample sizes are low, figures should be considered indicative. NVS and IVS data used from 2025-2024. DoTs data used for 2025.

Source: TRA (2026).

Figure 3.11. Visitors by Source Market, Donnybrook-Balingup

Note: Calendar year data. Sample sizes are low, figures should be considered indicative. NVS and IVS data used from 2025-2024. DoTs data used for 2025.

Source: TRA (2026).

While there is no official data available, the Shire has approximately 30 short-term residential accommodation (STRA) listings (i.e. airbnbs), ranging in price from \$150 to over \$1,000 per night, with an average of \$550. The Donnybrook Hotel has 12 pub style rooms and the Donnybrook Motel has 16 rooms. Additional accommodation is available through the transit parks in Donnybrook (20 sites, powered/unpowered) and in Balingup (29 sites, powered/unpowered) as well as the Kirup Tavern Caravan Park, which offers 12 powered sites and 10 unpowered sites.

Visitors to the region inject approximately \$35.8 million into the local economy, which mostly flows to locally owned, small businesses. The tourism industry directly accounts for 4.6% of the region's economy and 7.7% of employment in Donnybrook-Balingup (this proportion indicates lower wages and profits within this industry relative to the Donnybrook-Balingup average). These industry shares are larger than the Western Australia average (1.6% of IVA and 4.8% of employment). If tourism were considered by the ABS to be a standalone industry sector³, it would be the fifth largest industry in the Shire.

As an industry sector, tourism can represent a significant export sector and the visitor expenditure generated from visitors often goes to locally owned small business, greatly enhancing their financial sustainability.

Table 3.2. Economic Contribution of Tourism, 2024-25, Donnybrook-Balingup

Sector	\$M	% of Total
Industry Value-Add	\$16.4	4.6%
Employment	144	7.7%

Source: REMPLAN (2026).

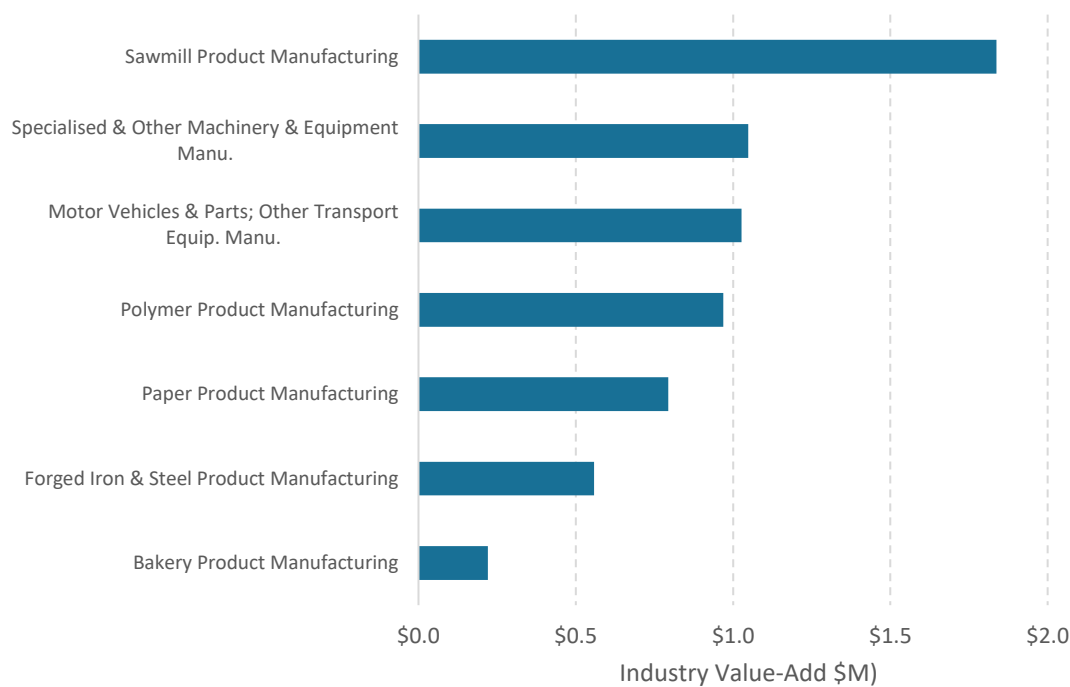
³ The ABS does not consider the tourism sector to be an industry but rather a sector that injects expenditure into multiple industries in the economy, most notably retail, accommodation and food services and transport.

3.3.3 Manufacturing

Manufacturing is the 10th largest industry in Donnybrook-Balingup in 2024-25 by IVA, accounting for 2.5% of total IVA. The industry also accounted for just 2.8% of the region's employment in the year.

The key manufacturing sub-industry is Sawmill product manufacturing (\$1.8 million in 2024-25).

Figure 3.12. Industry Value-Add by Manufacturing Sub-Industry, 2024-25



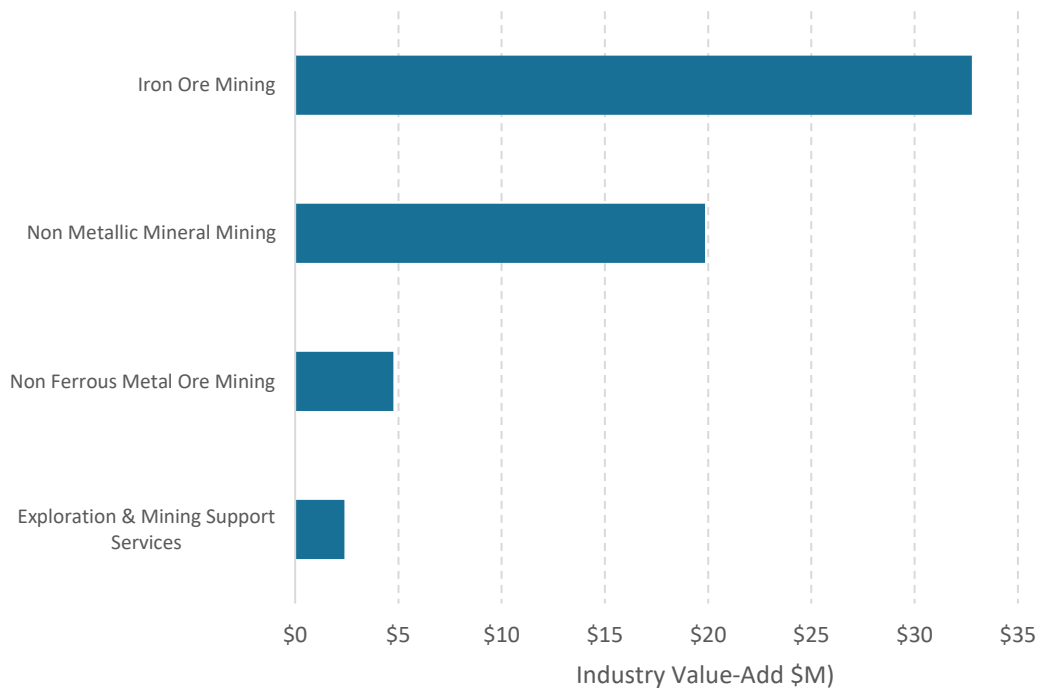
Source: REMPLAN (2026).

3.3.4 Mining

Manufacturing is the 2nd largest industry in Donnybrook-Balingup in 2024-25 by IVA, accounting for 16.5% of total IVA. The industry also accounted for 2.8% of the region's employment in the year.

The key manufacturing sub-industries are Iron ore mining (\$32.8 million in 2024-25) and Non-metallic mineral mining (\$19.9 million).

Figure 3.13. Industry Value-Add by Manufacturing Sub-Industry, 2024-25



Source: REMPLAN (2026).

4. Trade

Agriculture is the most notable trade sector in the Donnybrook-Balingup region, which means that it is the sector trading the most with other businesses outside of the region (Figure 4.1).

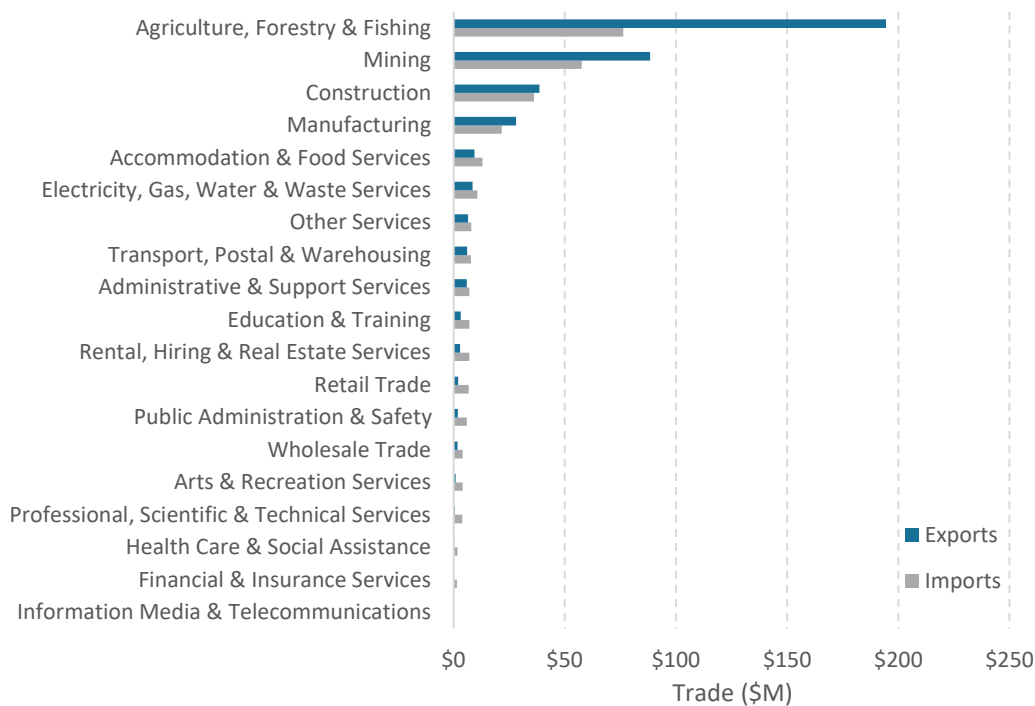
Exports are important as they provide value to a local business based on a customer that is not within the local region, often commanding a premium price.

At the same time, imports may represent an opportunity to replace a product or service from outside the local economy with one provided by a local business, thereby creating considerable value for the local economy.

Detailed analysis shows that Sheep, grains, beef and cattle and Other agriculture are key sub-sectors driving the exports and imports (Figure 4.2 and Figure 4.3).

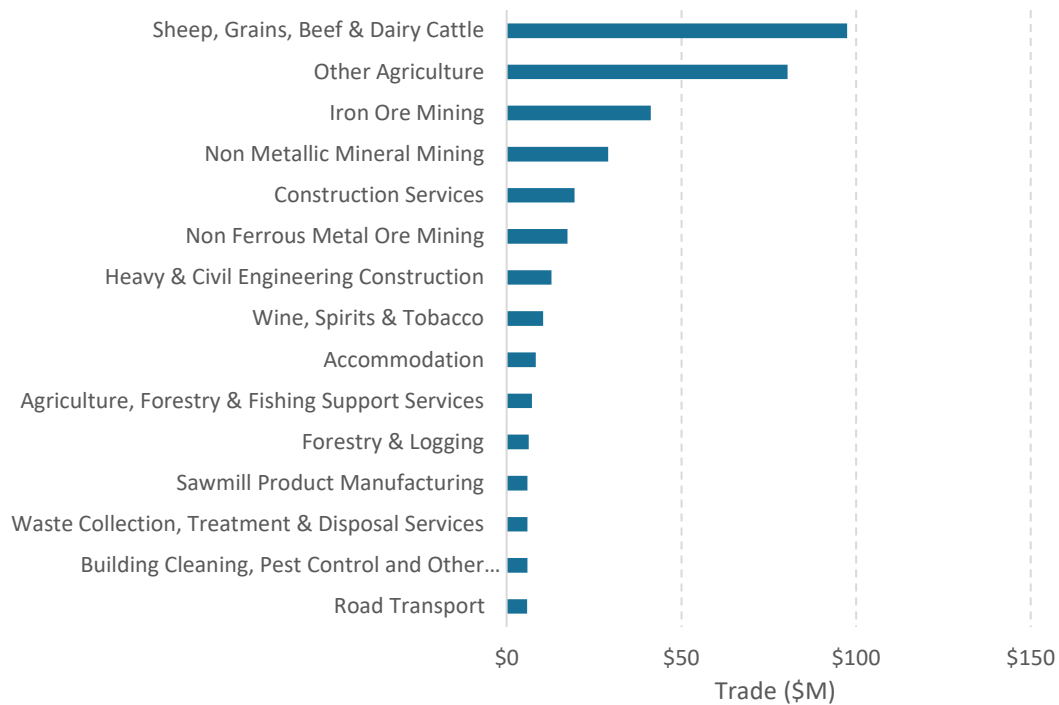
While replacing all the imports into these local sub-sectors would be difficult, there may be opportunities to strengthen the local supply chains.

Figure 4.1: Regional Trade by Industry, Donnybrook-Balingup, 2024-25



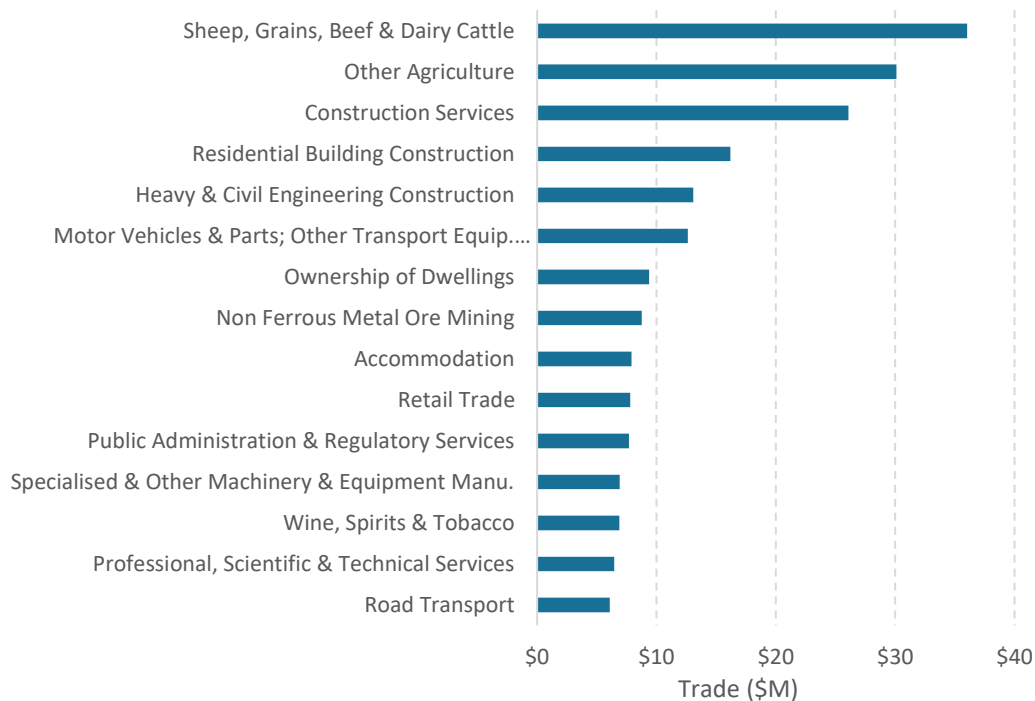
Source: REMPLAN (2026).

Figure 4.2: Top 10 Regional Exports by Industry, Donnybrook-Balingup, 2024-25



Source: REMPLAN (2026).

Figure 4.3: Top 10 Regional Imports by Industry, Donnybrook-Balingup, 2024-25



Source: REMPLAN (2026).

5. Employment and Skills

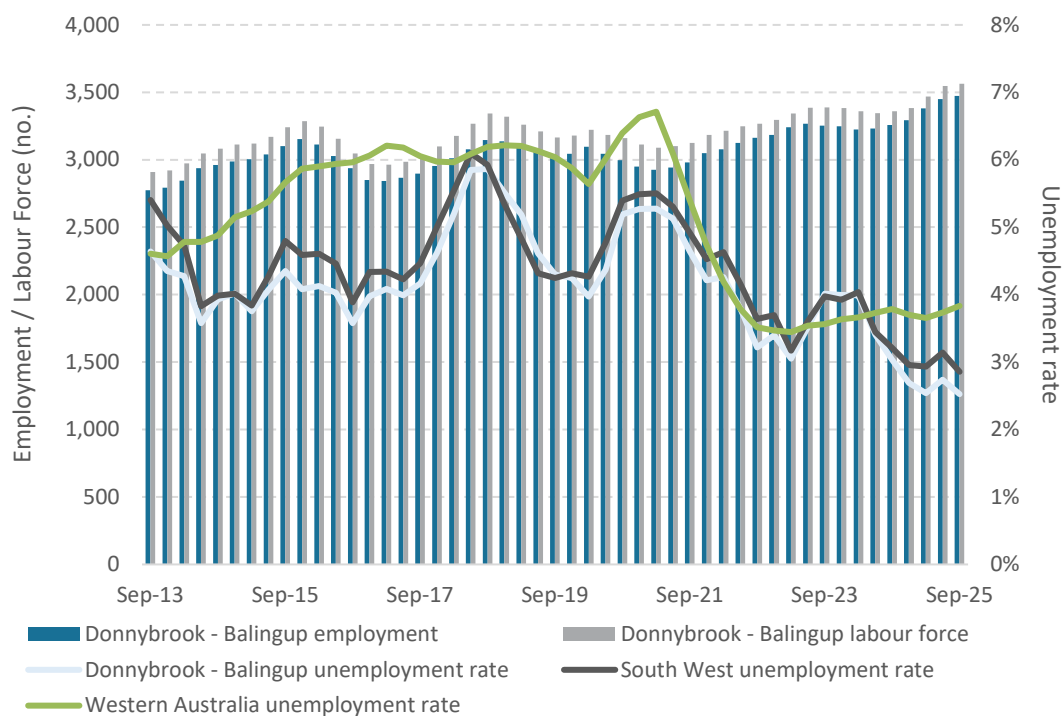
5.1 Labour Force and Unemployment

The Shire of Donnybrook-Balingup's labour market conditions have been remarkably tight since the onset of the COVID-19 pandemic. The region's unemployment rate was 2.5% in September quarter 2025 (latest data available), the equal lowest unemployment rate of the past 12 years and down from pre-COVID rate of 4.2% in December quarter 2019.

The region's unemployment rate has consistently been below both the South-West WA and Western Australia averages over the past 12 years (Figure 5.1).

Donnybrook-Balingup's labour force and employment rose over 6% over the year to September quarter 2025, well above the rate of population growth (1.4%). This suggests the participation rate in the region has risen sharply over the past year.

Figure 5.1. Labour Force and Unemployment Rates



Source: DEWR (2026).

Labour Force and Unemployment Data

These data sets are from the Department of Employment and Workplace Relations (DEWR) and track the number of people in the labour force (total), employed and unemployed. This data is based on place of residence, which differs from the analysis above regarding Gross Regional Product/Industry Value Add as well as the analysis below regarding employment, which focuses on data based on place of work. For the labour force survey, the definition of 'employed' includes all persons aged 15 years and over who worked for one hour or more during the reference week.

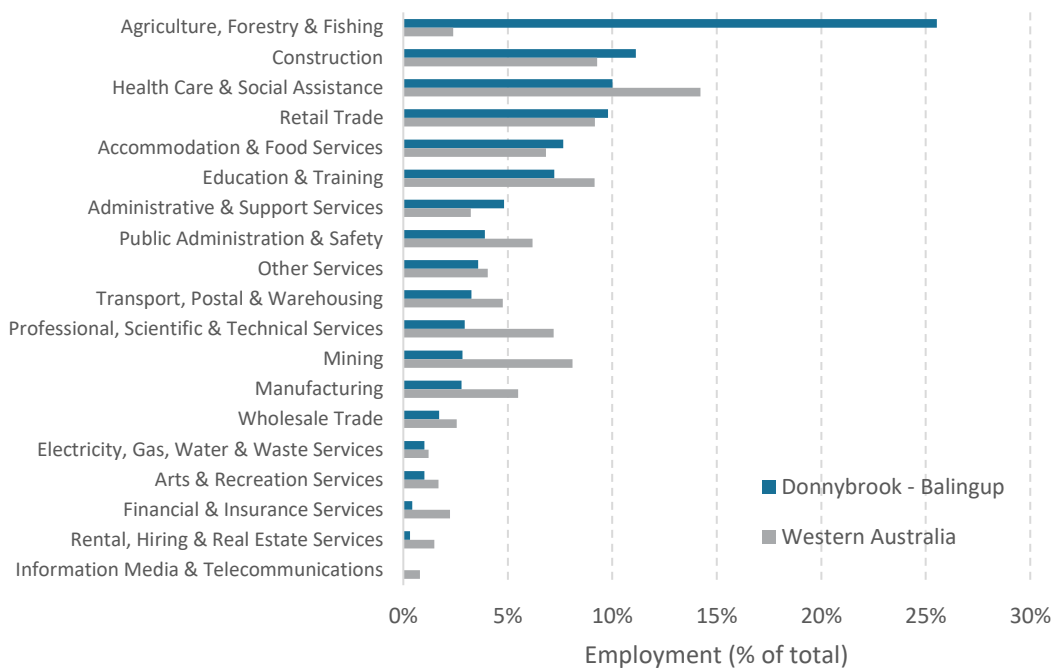
5.2 Employment

Agriculture is by far the largest employer in the Donnybrook-Balingup LGA, accounting for around one quarter of employment. Other major employers include construction (11%), Health care (10%) and Retail trade (10%).

The industry make-up of Donnybrook-Balingup has undergone significant change over the decade to 2021. With tourism a key sector of the local economy, strong employment growth over the past decade has been in Accommodation and food services and Retail trade (employment up a combined 84 persons, or 194%) and Retail trade (up 272 persons, or 34%).

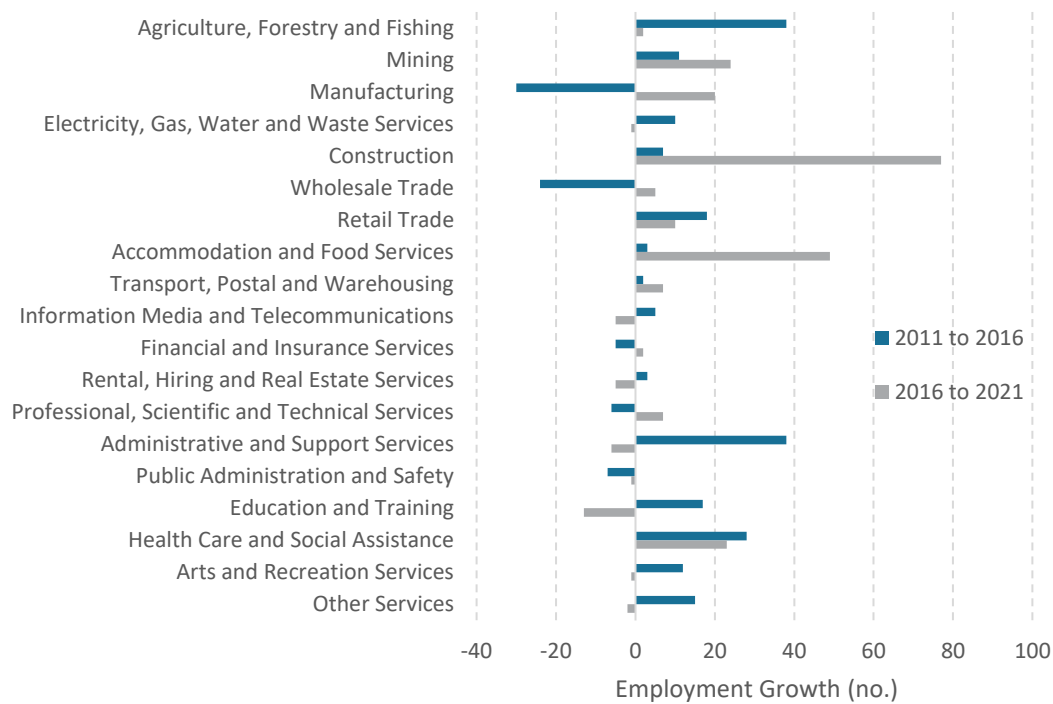
Construction (up 84 persons, or 88%) and Health care (up 51 persons, or 43%) have also seen strong growth over the decade to 2021. A total of 38 persons were employed within the Mining industry in 2021, up from just 3 in 2011.

Figure 5.2. Employment by Industry, 2025



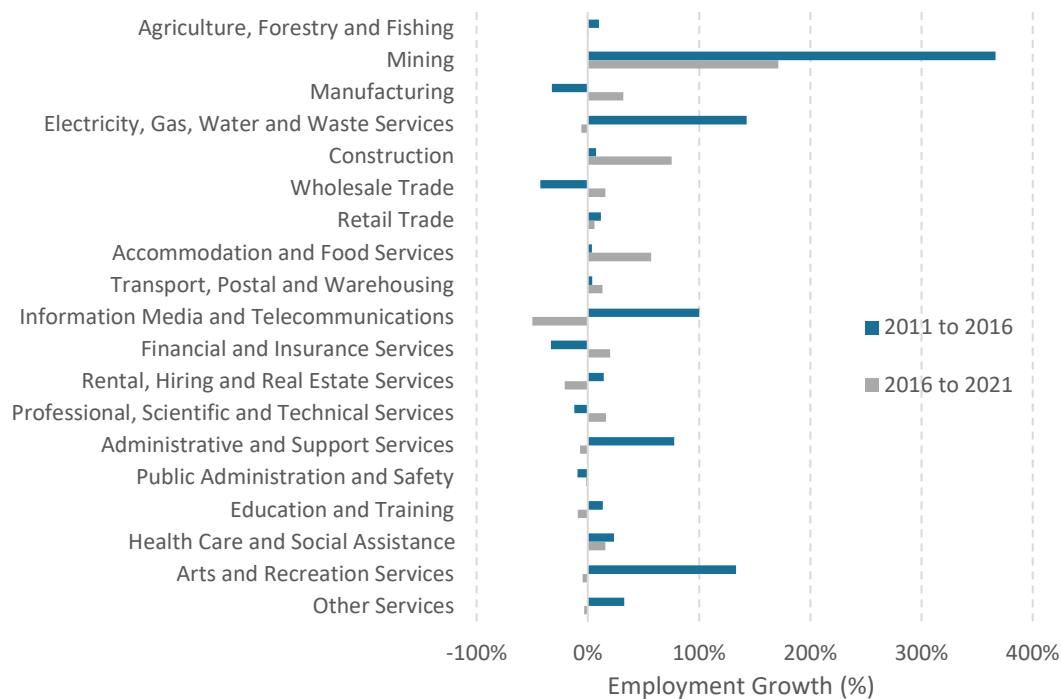
Sources: REMPLAN (2026).

Figure 5.3. Employment growth (no.), Donnybrook-Balingup



Sources: ABS (2022), ABS (2017), ABS (2012).

Figure 5.4. Employment growth (%), Donnybrook-Balingup



Sources: ABS (2022), ABS (2017), ABS (2012).

5.3 Journey to Work

Analysis of journey to work data from the 2021 Census shows there are a significant proportion of residents of Donnybrook-Balingup that travel to work in Bunbury (and other LGAs), while the majority of local workers are sourced from within the Donnybrook-Balingup LGA. Of note, over 20% of employed Donnybrook-Balingup residents travel to Bunbury for work, while only 105 Bunbury residents travel to Donnybrook-Balingup for work.

The analysis also shows that for the jobs available inside the LGA, 70% of them (1,291) are filled by local residents (Table 5.1). The nearby LGAs of Bunbury (5.7%) and Capel (5.6%) are key sources of workers within the Donnybrook-Balingup region.

Table 5.1. Journey to Work, Donnybrook-Balingup, 2021

Location	Number	%
Employed residents in the area		
Live and work in the area	1,291	47%
Live in the area, but work outside	1,324	48%
No fixed place of work	146	5%
<i>Total employed residents in the area</i>	<i>2,761</i>	<i>100%</i>
Workers in the area		
Live and work in the area	1,291	70%
Work in the area, but live outside	552	30%
<i>Total workers in the area</i>	<i>1,843</i>	<i>100%</i>

Source: ABS (2022).

Table 5.2. Journey to Work, by LGA, Donnybrook-Balingup, 2021

Top 10 employment locations of resident workers by Council			Top 10 residential location of local workers by Council		
Council	No.	%	Council	No.	%
Donnybrook-Balingup	1,291	46.8	Donnybrook-Balingup	1,291	70.0
Bunbury	569	20.6	Bunbury	105	5.7
Bridgetown-Greenbushes	155	5.6	Capel	104	5.6
No Fixed Address (WA)	146	5.3	Bridgetown-Greenbushes	52	2.8
Collie	106	3.8	Harvey	45	2.4
Capel	60	2.2	Dardanup	36	2.0
Dardanup	59	2.1	Busselton	34	1.8
Harvey	52	1.9	Wyndham-East Kimberley	19	1.0
East Pilbara	38	1.4	Swan	14	0.8
Busselton	33	1.2	Boyup Brook	13	0.7

Source: ABS (2022).

5.4 Skills

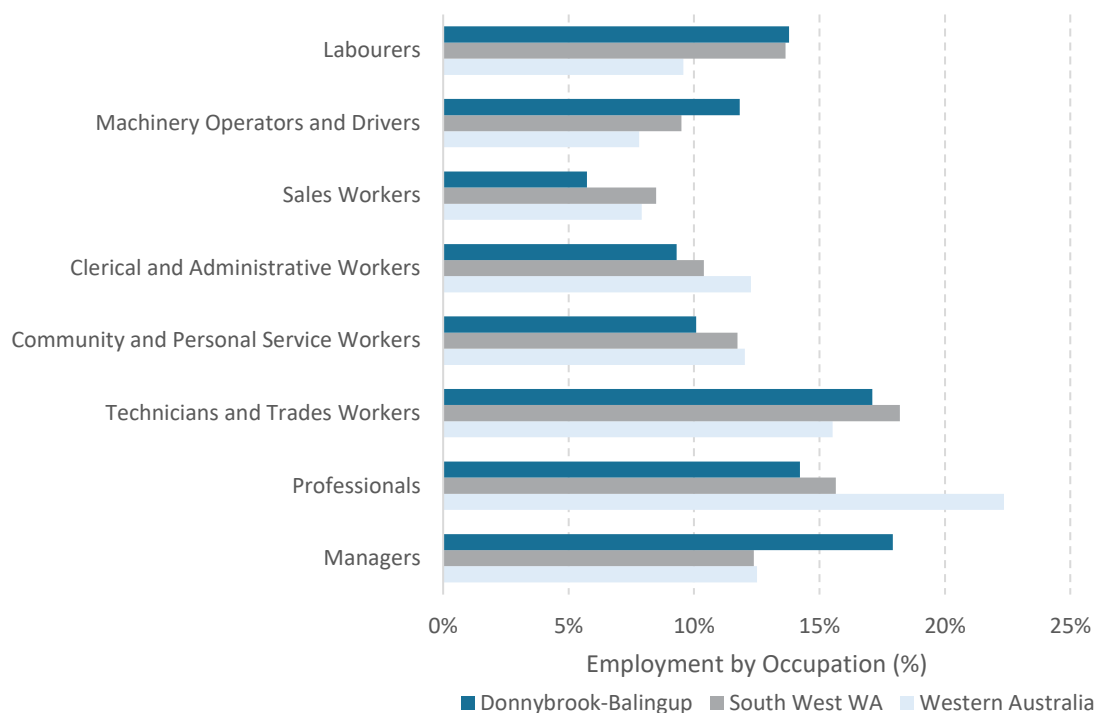
Workforce and Skills

The skills in an economy can be considered in terms of its local resident workforce (i.e. the people who reside in the area and their associated skills) as well as in terms of the local workers (i.e. the people who work locally). Because 70% of local jobs are filled by local people, these two perspectives will align to a large degree. A shortage or surplus in any area will help us understand any existing skills gaps in the local resident workforce.

The Shire of Donnybrook-Balingup had a significantly lower proportion of Professionals and Sales workers than the Western Australia average in 2021.

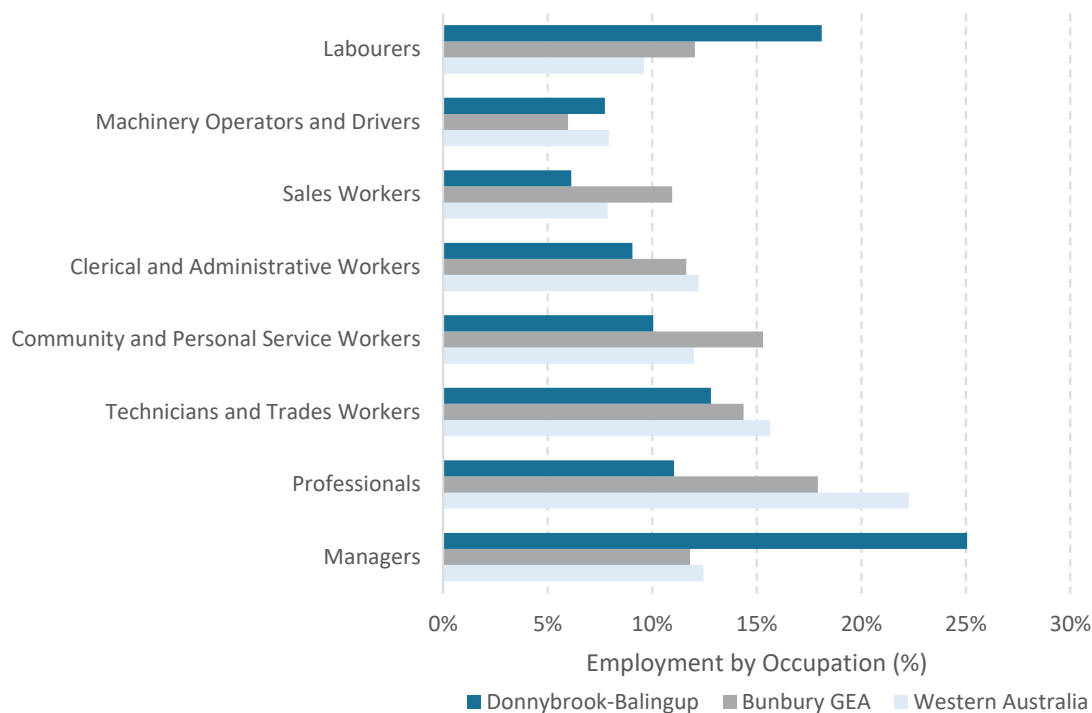
However, the Shire of Donnybrook-Balingup also has a higher representation of Labourers, Machinery operators and drivers, and Managers than the Western Australian average.

Figure 5.5. Employment by Occupation (place of usual residence), 2021



Source: ABS (2022).

Figure 5.6. Employment by Occupation (place of work), 2021



Source: ABS (2022).

5.5 Value of Employment

Different industries contribute varying degrees of value to the local economy based on a variety of factors including supply chains, price of goods sold and overall position in the economy.

As highlighted below (Figure 5.7), Mining is by far the highest value-adding industry in the local economy.

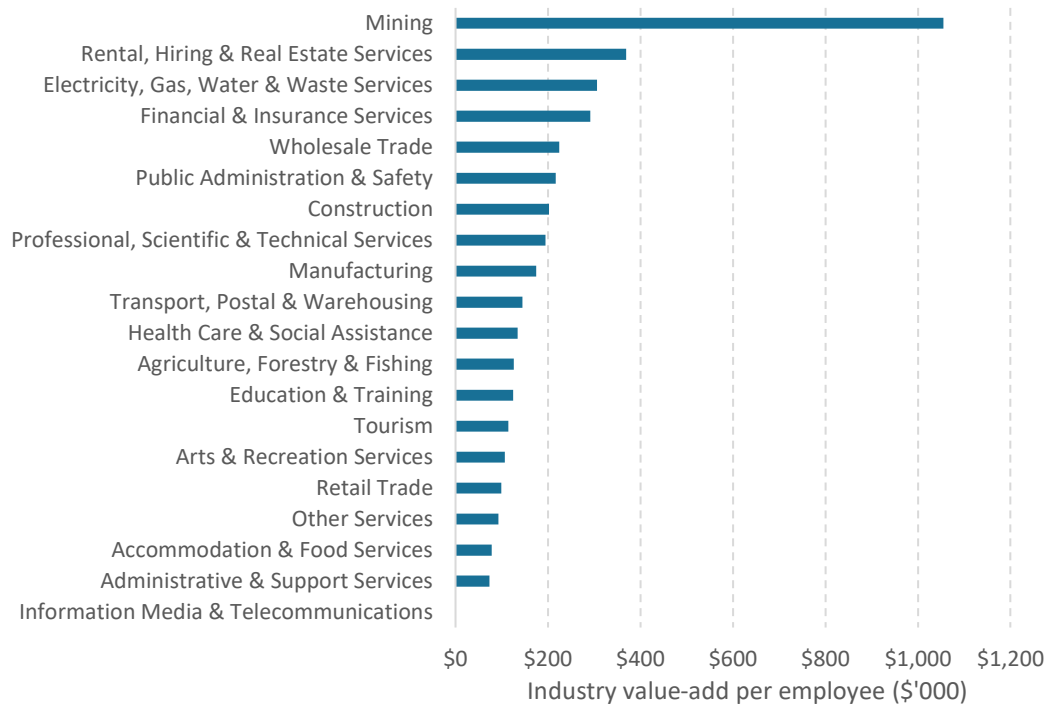
Of concern given the high proportion of Donnybrook-Balingup's employment associated within tourism-related industries, with Tourism and Retail trade amongst the lowest value-adding sectors in the local economy.

High Value-Adding Jobs

In terms of economic development, growing high value-adding jobs will have greater benefits to the overall economy than increases in low value-adding jobs. The core difference is related to the relevant supply chains of these industries as well as the wages that are often paid across those industries. High value-adding jobs will provide a greater ability to spend more in the local economy, which will create a greater flow-on benefit locally. Additionally, businesses that have more local supply chains (or the opportunity for them) will have the ability to support additional businesses, creating more value in the local economy.

Because one job may offer greater value than another, this does not mean that lower value-adding jobs are not important. These jobs often provide employment for youth and offer an entry point into the workforce for many residents. Rather, understanding the value of employment should guide the balance of effort and resources in terms of various industry development and investment attraction activities.

Figure 5.7. Industry Value-Add per Employee, Donnybrook-Balingup, 2024-25



Source: REMPLAN (2026).

6. Property

6.1 Property Prices

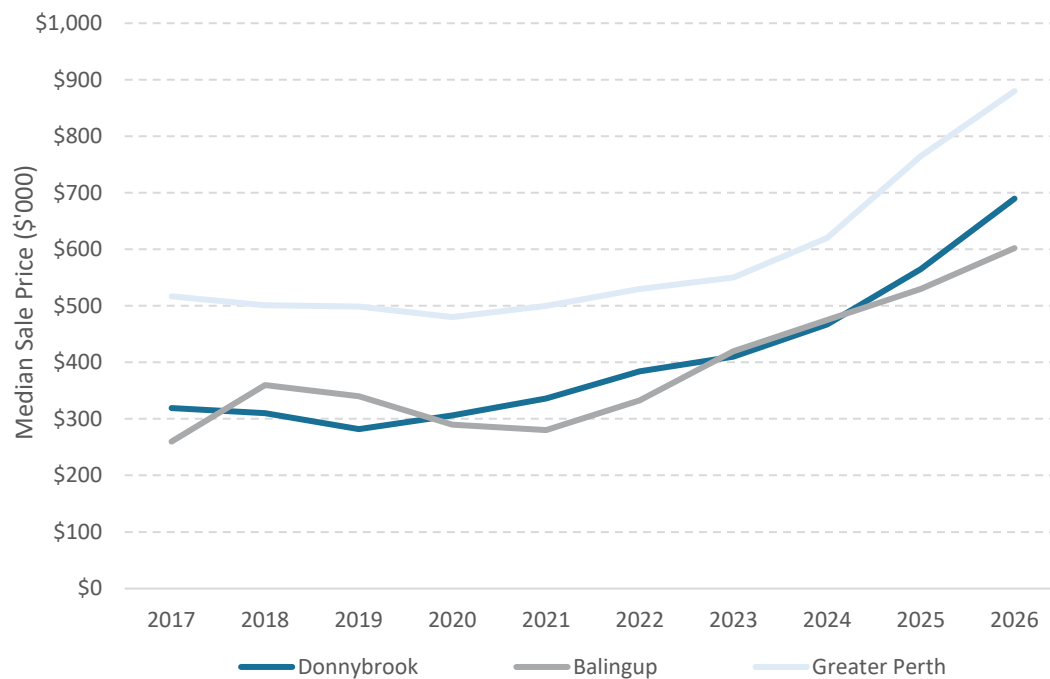
At \$690,000 in 2026, the median house price in Donnybrook is significantly lower than the Greater Perth median. However, the median house price in Donnybrook and Balingup have risen at a faster rate than the Greater Perth median over the past six years.

Table 6.1. Median House Sale Price

Region	2020	2025	2026	Annual change	6-year avg ann change
Donnybrook	\$306,000	\$565,000	\$690,000	22.1%	14.5%
Balingup	\$290,000	\$530,000	\$602,000	13.6%	12.9%
Greater Perth	\$480,000	\$765,000	\$880,000	15.0%	10.6%

Source: REIWA (2026).

Figure 6.1. Median Suburb House Sale Price

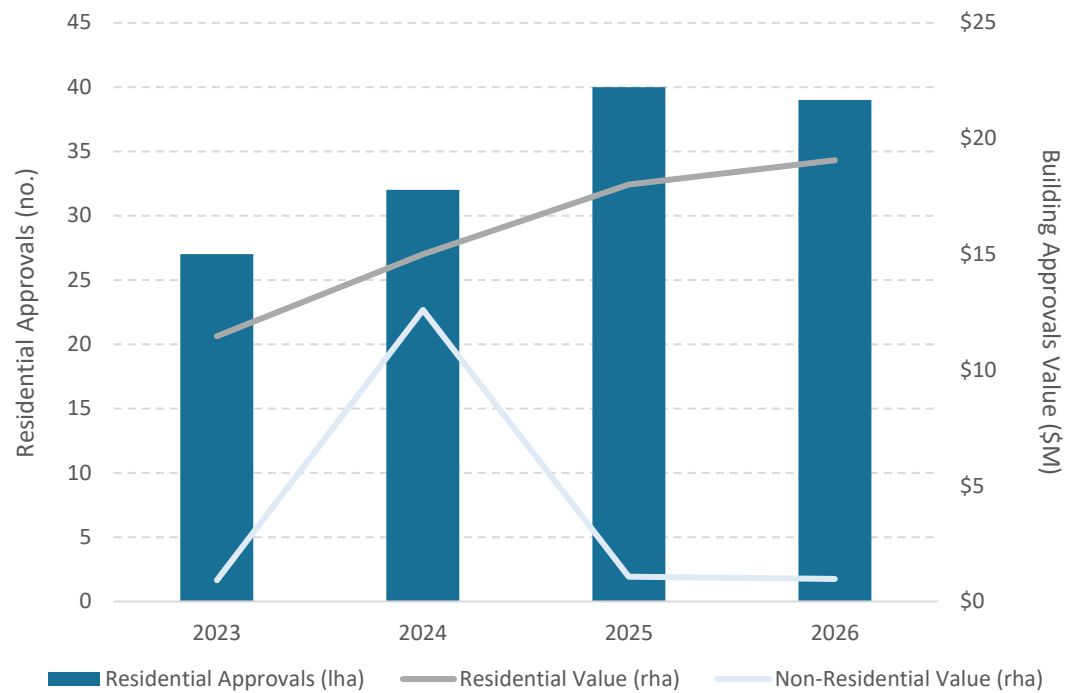


Source: REIWA (2026).

6.2 Building Approvals

Consistent with strengthening population growth, rising housing prices and high dwelling construction inflation in recent years, the number and value of residential building approvals in the Shire of Donnybrook-Balingup have trended sharply higher in recent years.

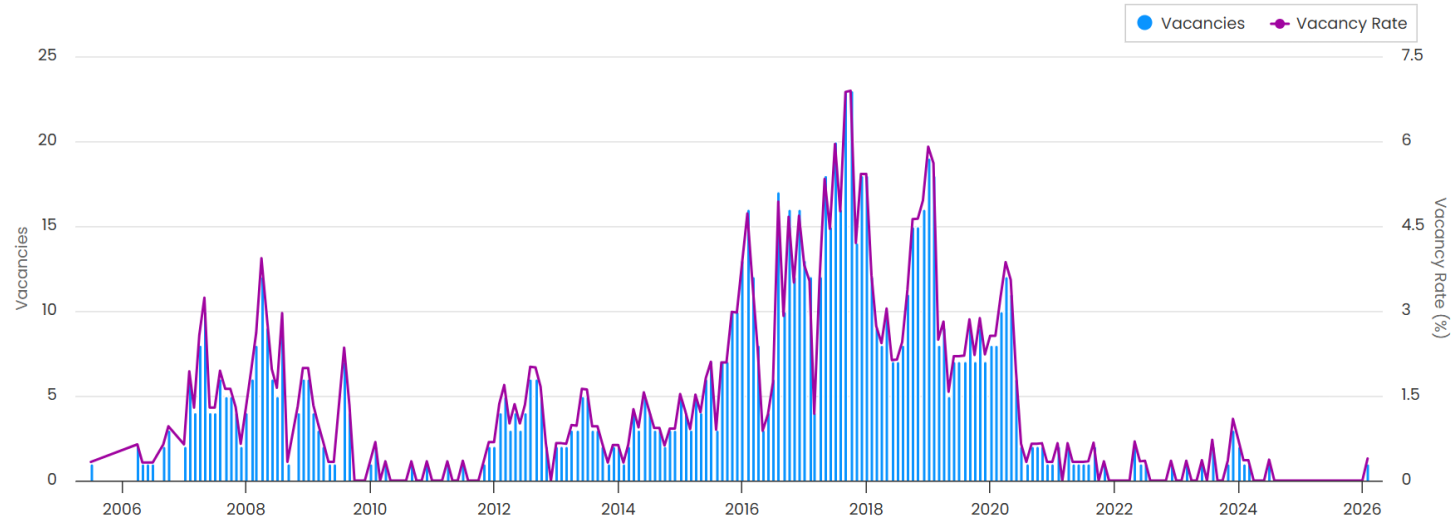
Figure 6.2. Building Approvals, Donnybrook-Balingup LGA



Note: year ending January data.

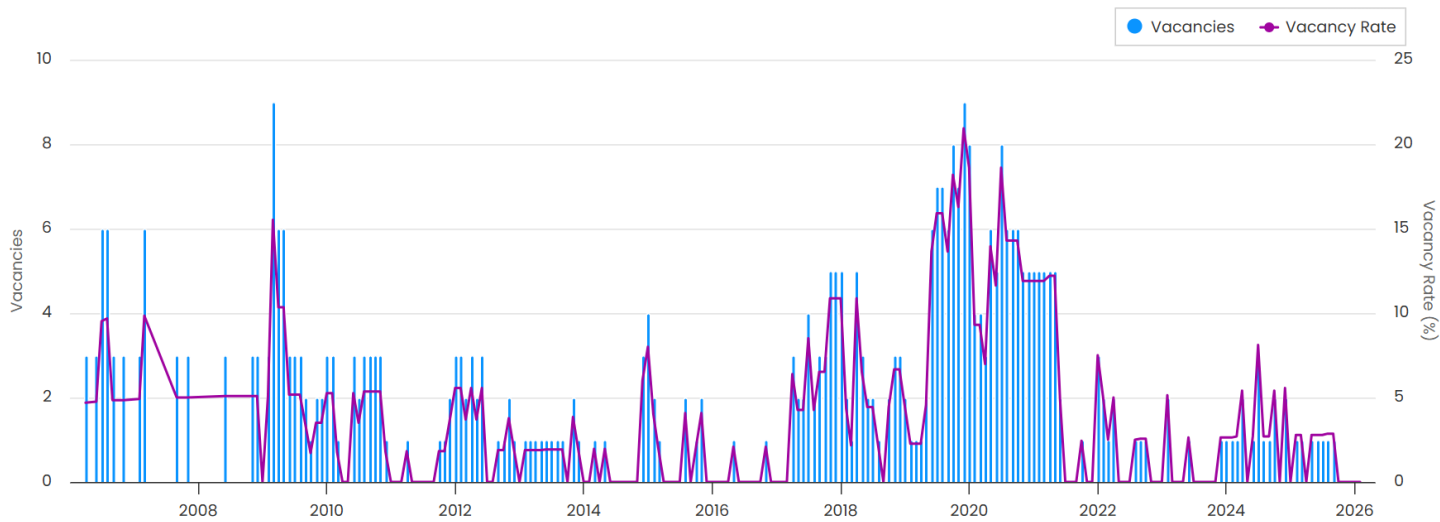
Source: ABS (2026c).

Figure 6.3. Residential Vacancy Rate, Post Code 6239 (Donnybrook)



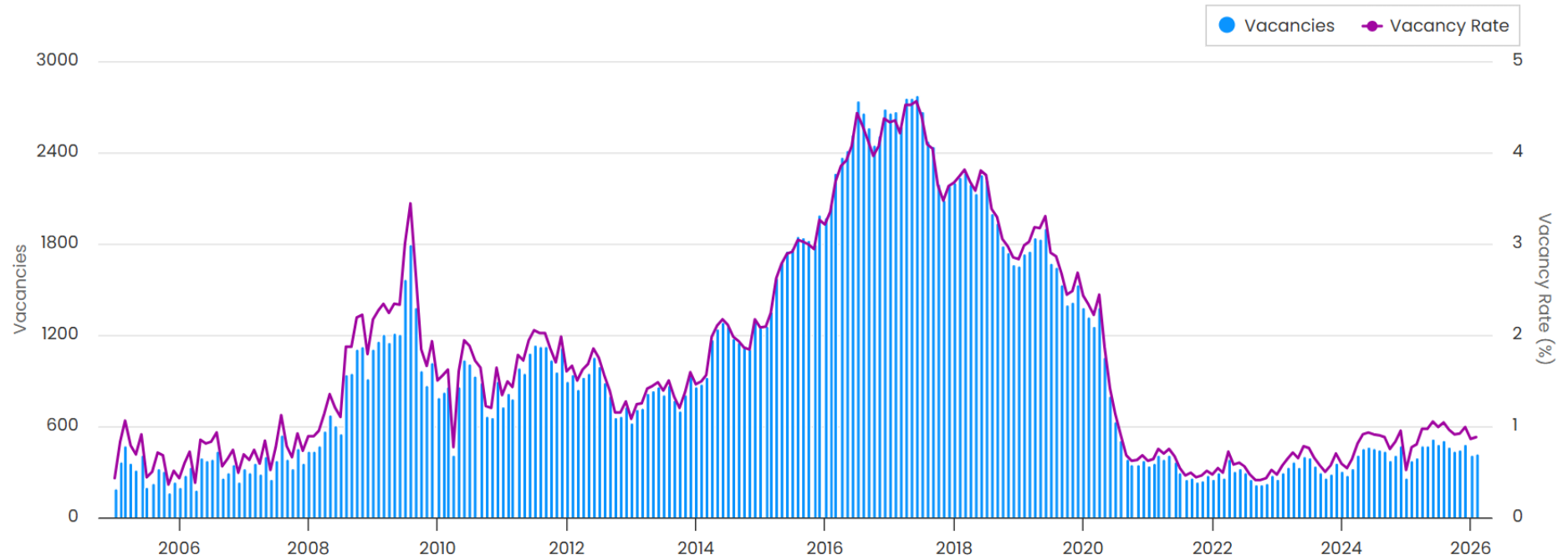
Source: SQM Research (2026).

Figure 6.4. Residential Vacancy Rate, Post Code 6253 (Balingup)



Source: SQM Research (2026).

Figure 6.5. Residential Vacancy Rate, South West WA



Source: SQM Research (2026).

7. Competitive Advantages and Opportunities

Identifying Competitive Advantages

Identifying and leveraging competitive advantages is important for successful economic development efforts at the local level. Competitive advantages can exist in many forms including location, natural resources, industry specialisation and/or infrastructure. This section seeks to identify the unique competitive advantages of the Shire of Donnybrook-Balingup using various analytical techniques, including:

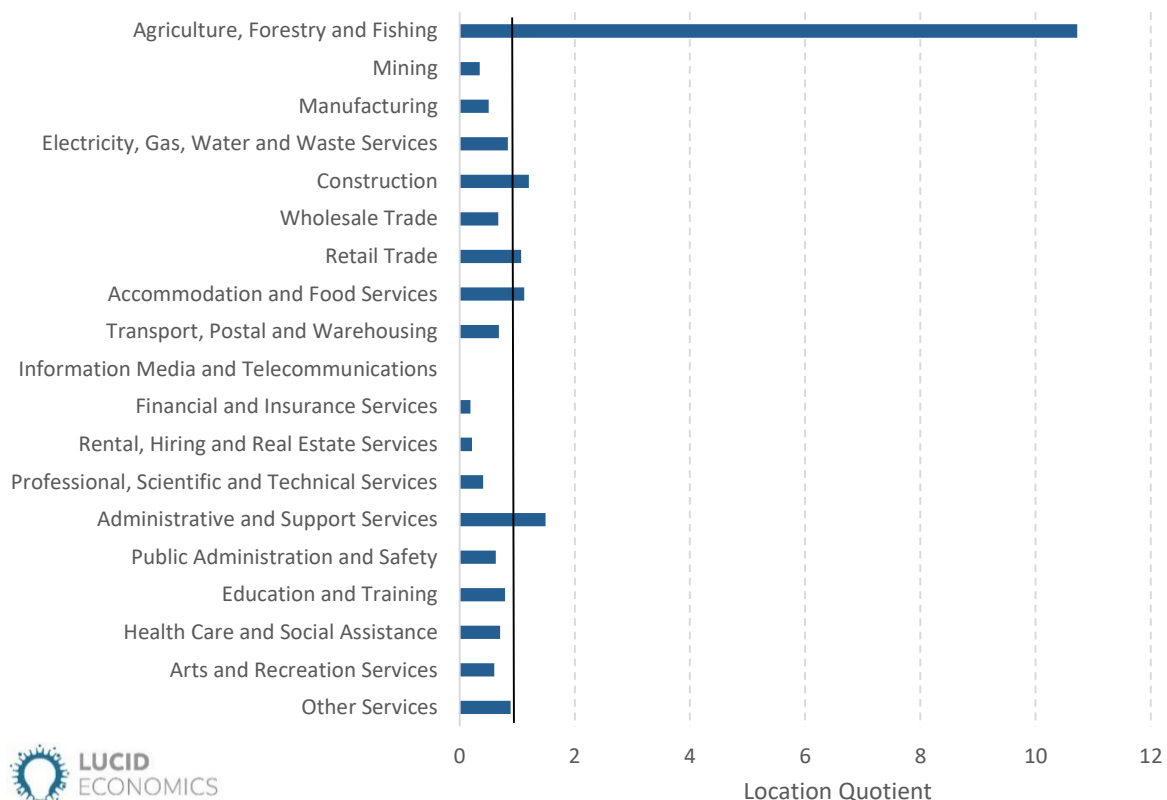
- Location quotient analysis
- Cluster mapping

This analysis will identify various industry opportunities for the Shire of Donnybrook-Balingup to be tested and verified through consultation.

The following graph shows the Shire of Donnybrook-Balingup's competitive advantages by industry due to local employment specialisation. Essentially, the location quotients show the proportion of workers in individual industries with the '1' line representing parity with Western Australia. Industries showing a specialisation above the '1' line indicate areas of natural competitive advantage.

The analysis shows the natural competitive advantages for the Shire of Donnybrook-Balingup in agriculture, administrative support services, construction and tourism (retail trade and accommodation and food services).

Figure 7.1. Employment Location Quotients, Donnybrook-Balingup (benchmarked to Western Australia), 2024-25



Source: REMPLAN (2026).

The following cluster maps help us to understand the relative competitive advantage against a backdrop of future expected employment growth, as well as existing local employment strengths.

Cluster Mapping

Cluster mapping is an analytical tool to consider future economic growth opportunities and to show the importance and growth opportunities for various clusters or industries within the economy. The cluster maps for the Shire of Donnybrook-Balingup (Figure 7.2 and Figure 7.3) show the significance and importance of the existing agricultural cluster. The mapping also shows the growth potential of various other clusters such as the health care and social assistance and the professional, scientific and technical services industries.

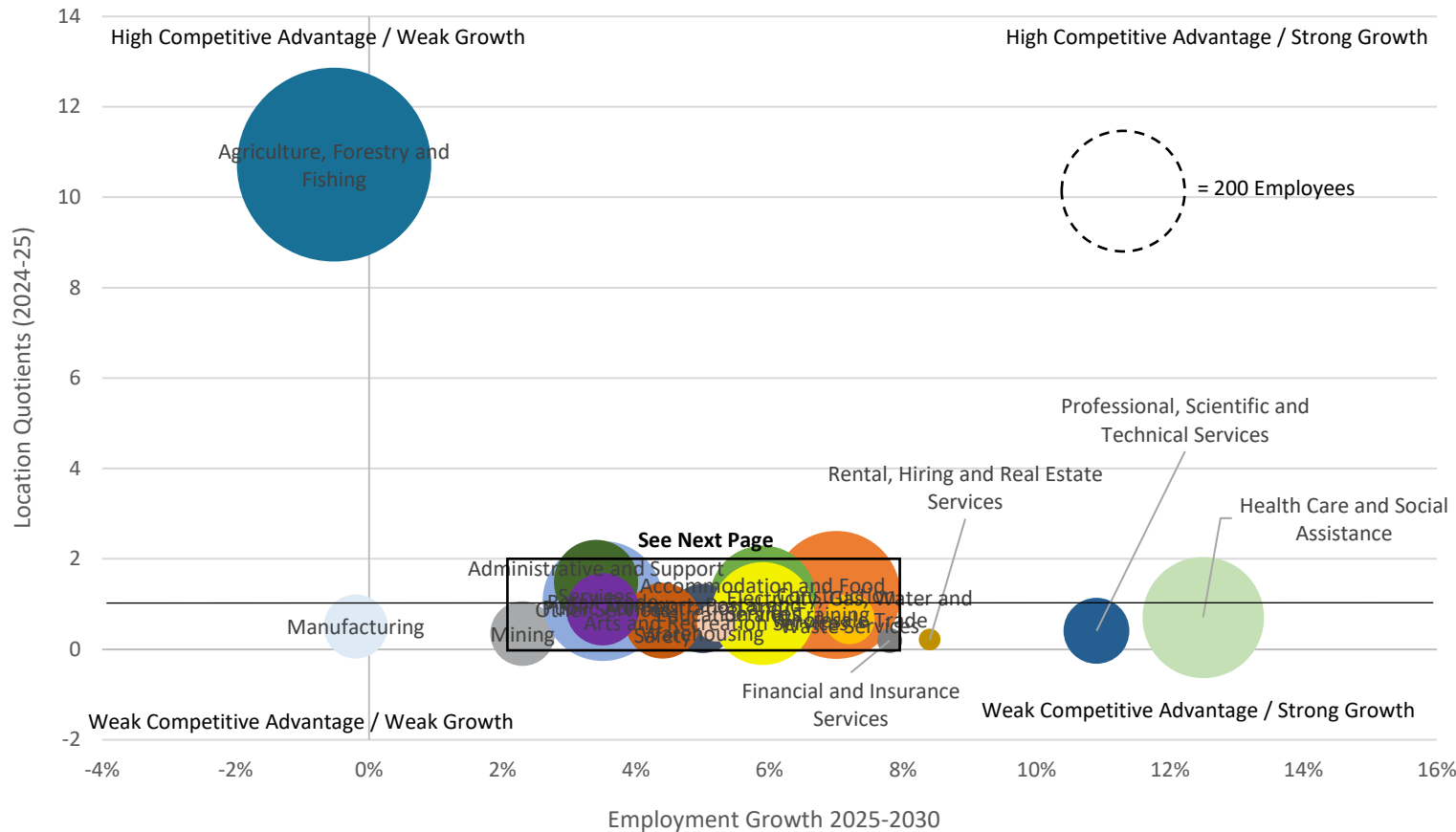
Interpreting the Cluster Map

Cluster mapping is an analytical tool that can simultaneously present the size and scale of a location's competitive advantages with future anticipated growth trends by industry. In cluster mapping, a location's competitive advantage is viewed through labour specialisation (i.e. the relative scale of employment in specific industries). There are three main components to the cluster map:

- **Location quotient:** the community's location quotients are presented along the vertical axis, and these points represent the proportional employment in the community versus a comparison, in this instance Western Australia (i.e. compared with WA, how many people are employed in the sector; 1 = the same, 1.2 = 20% more than the state, etc.).
- **Employment Growth:** future employment growth expectations per industry, from 2025 to 2030, form the horizontal axis and tell us the percentage growth expected for a sector. In this instance, projections from the Department of Jobs and Skills Australia (DJSa, 2026) have been used.
- **The Cluster:** or the 'bubble' represents the size of local employment in that given sector, which shows the significance of the sector locally.

Overall, cluster mapping helps to identify industry areas of focus for further development in the future.

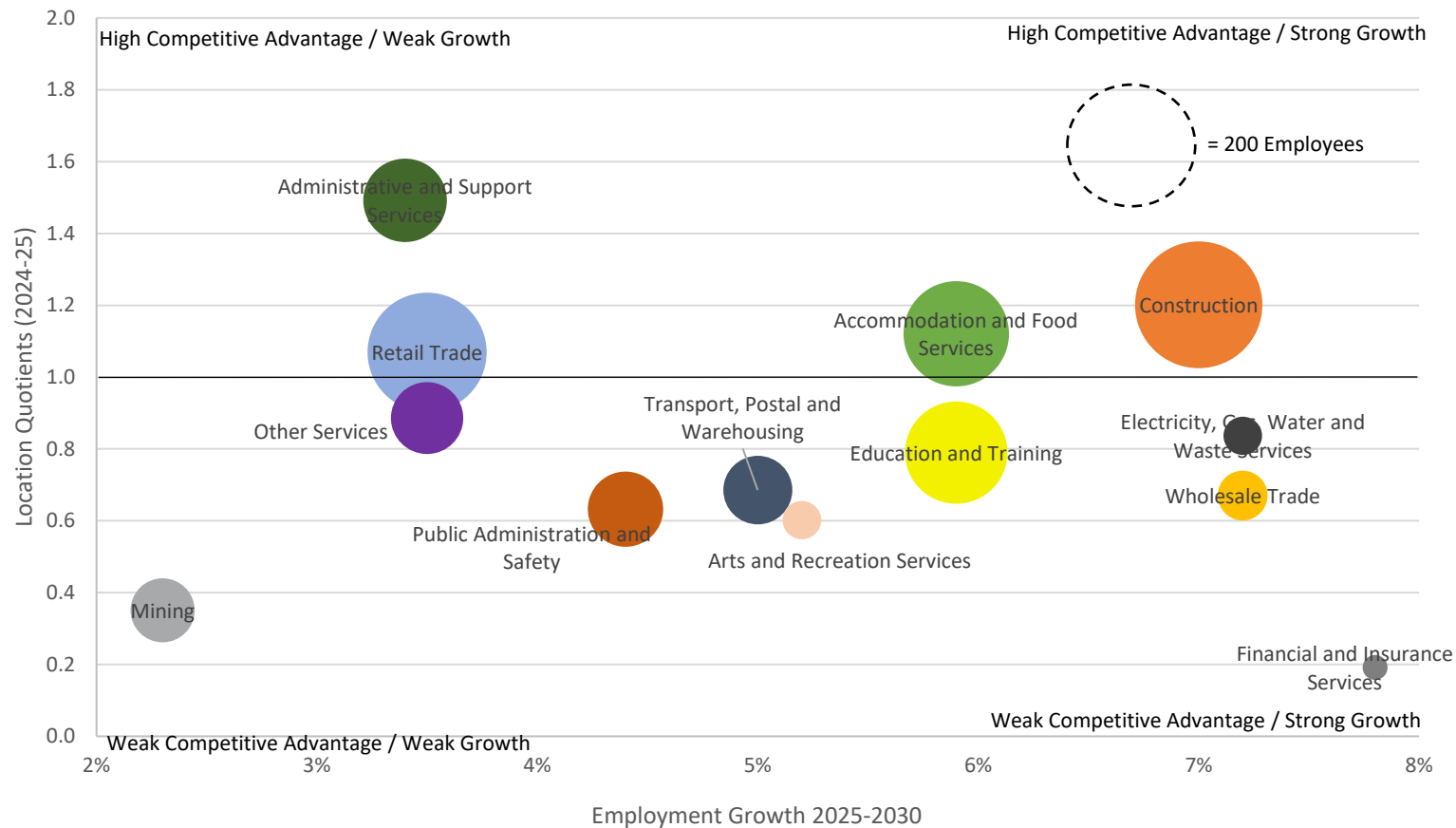
Figure 7.2. Cluster Map (1-digit), Donnybrook-Balingup



Note: Location quotient calculated by proportion of Donnybrook-Balingup employment divided by proportion of Western Australia employment. Location quotient of greater than 1 indicates industry makes up larger proportion of Donnybrook-Balingup employment than it does across Western Australia.

Sources: REMPLAN (2026), DJSA (2026).

Figure 7.3. Cluster Map (1-digit) Inset, Donnybrook-Balingup



Note: Location quotient calculated by proportion of Donnybrook-Balingup employment divided by proportion of Western Australia employment. Location quotient of greater than 1 indicates industry makes up larger proportion of Donnybrook-Balingup employment than it does across Western Australia.

Sources: REMPLAN (2026), DJSA (2026).

The analysis above indicates that there are future economic development growth opportunities in the following industries:

- Healthcare
- Professional services
- Tourism (represented by accommodation and food services)

It will be important for the Shire of Donnybrook-Balingup to consider how the Council can influence these sectors to grow into the future.

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