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Sustaining the 3Rs - Rural, Regional and Remote Housing Markets in Western Australia

Dr Steven Rowley, Senior Lecturer, Department Property Studies,
Curtin Business School, Curtin University,
Perth, Western Australia.
steven.rowley@cbs.curtin.edu.au

Professor Fiona Haslam-McKenzie, Professorial Fellow,
Curtin Graduate School of Business Curtin University,
Perth, Western Australia.
f.mckenzie@curtin.edu.au

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Abstract

The housing markets of non-metropolitan Australia are often ignored by both policy makers and academics. The factors influencing housing demand and supply in this diverse sector are not well understood and are often very different to urban markets. This paper explores a selection of rural, regional and remote (3R) housing markets within Western Australia and unpicks some of the issues which drive these markets. For example, the resources boom has had a dramatic affect on 3R towns in Western Australia with the demand for accommodation from mining companies and supporting organisations placing severe pressure on housing markets, both large and small. Resource industry-led demand has increased house prices and rents dramatically in some areas resulting in serious affordability issues for communities. However, even those towns without resource based industries have seen price growth in excess of metropolitan areas creating significant challenges for these communities and their policy makers.

Using house price data for Western Australia, the paper explores how different 3R housing markets have been affected by a variety of economic conditions. The paper builds on the quantitative analysis by utilising results from four case study towns within the State. The case studies allow an exploration of the key supply and demand drivers in these towns and offer an insight into the unique circumstances influencing 3R housing markets in Australia. The paper concludes with a discussion of the challenges facing policy makers if they are to deliver thriving and sustainable communities in non-metropolitan Australia.

Sustaining the 3Rs - Rural, Regional and Remote Housing Markets in Western Australia

Introduction

This paper draws on research undertaken over a number of years throughout Western Australia (WA), principally for the Australian Housing and Urban Research Institute (AHURI), examining the declining affordability and availability of housing in non-metropolitan locations. The situation has been exacerbated by a prolonged resources boom which has drawn many people to the State and increased local incomes within housing markets unable to expand to meet this new demand. The housing situation has had a negative impact upon a variety of communities in a variety of ways but not just for those markets in proximity to resource activities. However, it is the resource towns that have been most affected, and, in the case of Karratha in the Pilbara region, constitutes a community crisis.

Western Australia is the largest State in Australia but approximately 80 per cent of the population resides in the capital city, Perth (Australian Bureau of Statistics 2009). The remainder live in rural, regional and remote areas with the majority of these people living in the southern third of the State, although as discussed later, the prolonged mining boom has attracted many people to work in northern areas. The housing markets of rural, regional and remote Australia face very different challenges to those in Urban markets (for a review of the literature see Tually et al 2010 and Beer et al 2010).

The strength of the WA economy has been the key driver of many 3R housing markets. Population growth on the back of strong employment has meant price rises have spread out from the Metropolitan area. Rising incomes and investment demand on the back of strong capital growth have contributed to demand. Table 1 illustrates the strength of the WA economy through the State's contribution to overall GDP relative to its population. A figure of 1 would be the benchmark measure where a state with 10% of Australia's population contributes 10% of its GDP. The figure in WA is 1.28 describing an economic contribution well above its population level. Victoria, Queensland, Tasmania and South Australia all contribute well below the level expected. The strength of the WA economy was one of the main reasons why Australia avoided a recessionary period during the recent global economic downturn.

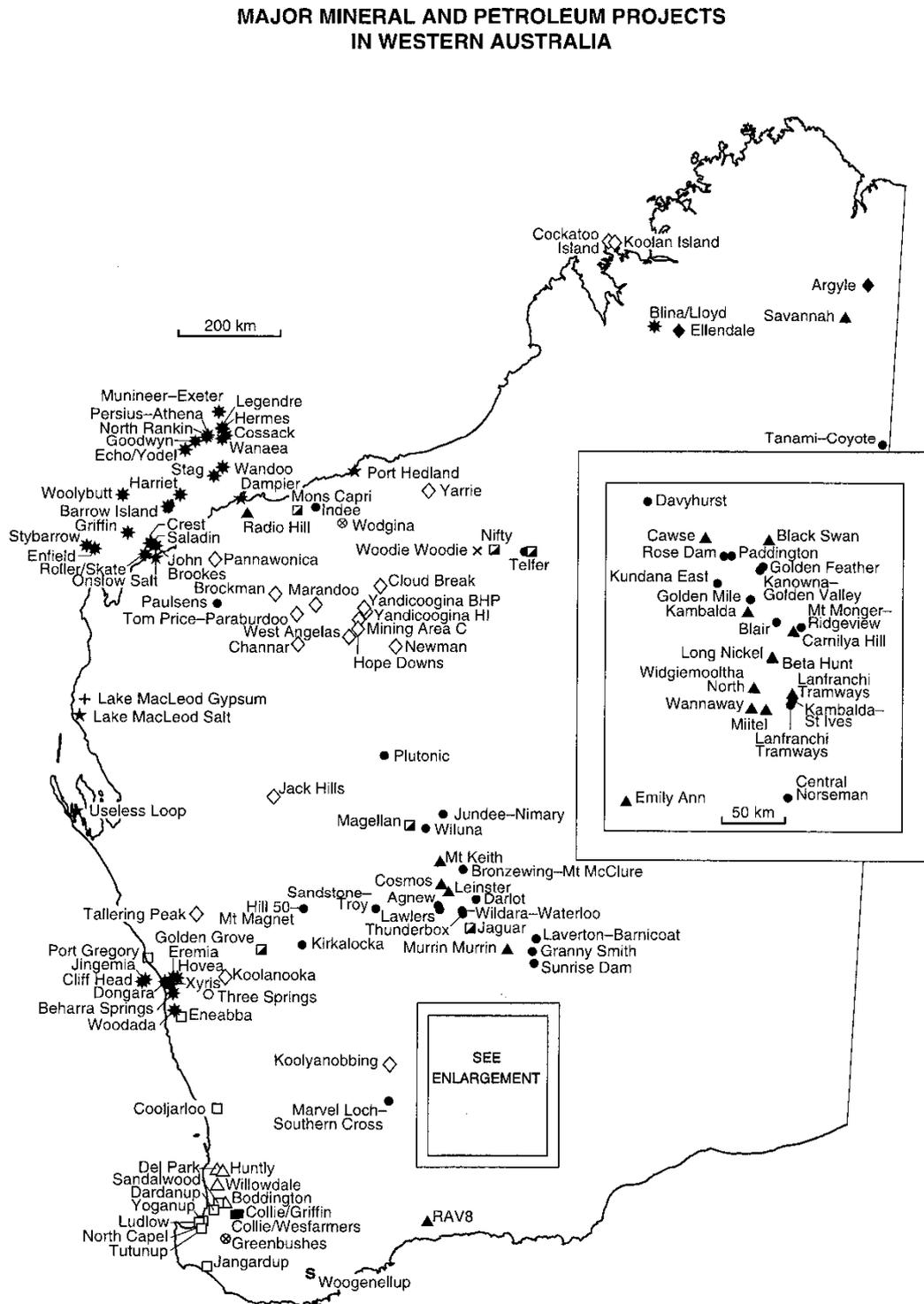
Table 1: State contributions to GDP

	NSW	Victoria	Queensland	South Australia	Western Australia	Tasmania
State Contribution to GDP 2009	32%	24%	19%	7%	13%	2%
Population Contribution 2009	32%	25%	20%	7%	10%	2%
Relative Measure of State GDP Contribution	0.99	0.96	0.93	0.89	1.28	0.83

Source: Derived from 5206.0 - Australian National Accounts: National Income

Resources projects have played a huge part in driving the WA economy. Most of the mining activity in Western Australia has tended to be in remote and regional areas (see Figure 1). Consequently many remote areas have experienced unprecedented levels of demand.

Figure 1



Literature

There is a small but important literature on regional housing markets and their impact on regional communities in Australia that includes the Rural Centres Housing Study (Econsult (Australia) and Phillips MPW Australia 1989), Beyond the Capitals (Beer et al. 1994) and several publications from the Australian Housing and Urban Research Institute (Hillier et al. 2002; Wulff 2007) into the nature and dynamics of housing in resource towns. Hassell (2002) undertook important research into the supply of rental accommodation in non-metropolitan Australia showing the escalating unmet need and cost. James's (2009) work suggests that the housing market processes and dynamics identified two decades earlier continue to exert a strong impact on regional housing markets and this was underscored by the Senate Select Committee (2008) appointed in 2007 to investigate the demand and supply dynamics of housing in Australia and the escalation in cost of housing. This Committee found that despite alarm bells ringing for some time, the problem of inadequate, inappropriate and unaffordable housing particularly in much of non-metropolitan Western Australia had worsened.

Two recent Australian Housing and Urban Research Institute (AHURI) projects provide a review of the Australian and international literature relating to rural, regional and remote housing markets and, in particular, the impact of the resources industry on these towns. McKenzie et al (2008 and 2009) review the international and Australian literature before reporting the findings of their study on the impact of the resources boom on regional housing markets. Tully et al (2009 and 2011) describe the supply and demand drivers of rural housing markets in Australia again reviewing international literature. Rather than repeat the findings of the two studies, readers are encouraged to review the documents. The fieldwork from both studies forms part of this paper.

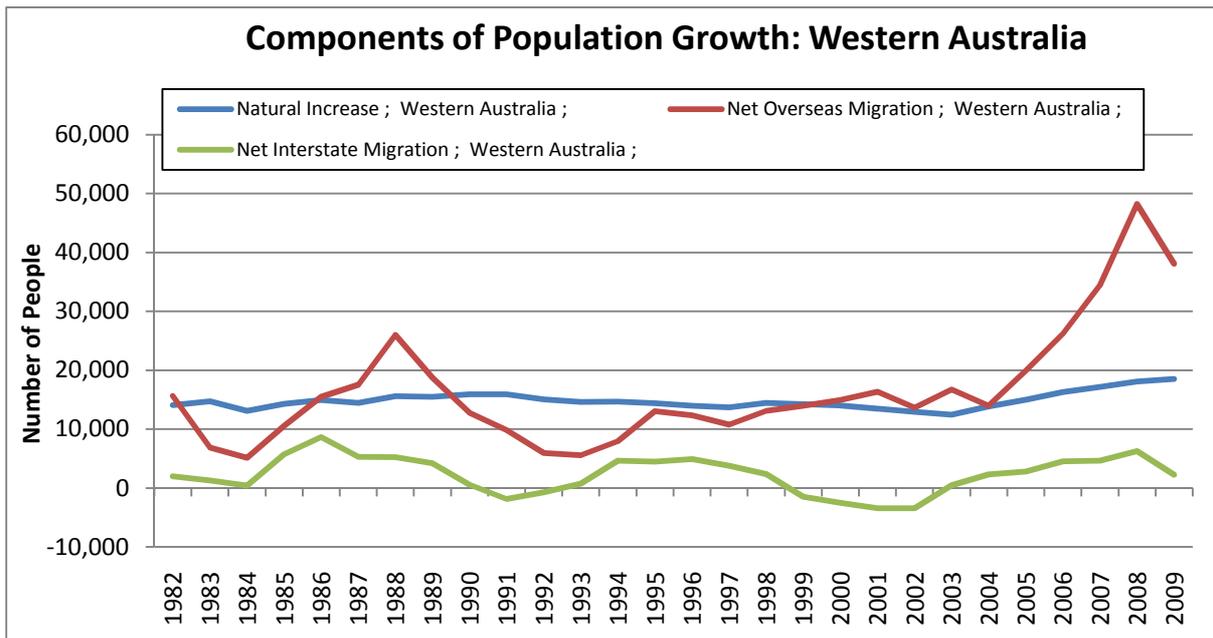
Housing Market Demand in 3R Western Australia

The housing markets of 3R Western Australia have been driven by a combination of factors:

- Population growth
- Employment growth
- Income growth
- Consumer confidence
- Land and housing shortages
- Internal and external investment activity following potential returns from capital and rental growth
- Relative affordability of housing in comparison to the metropolitan market

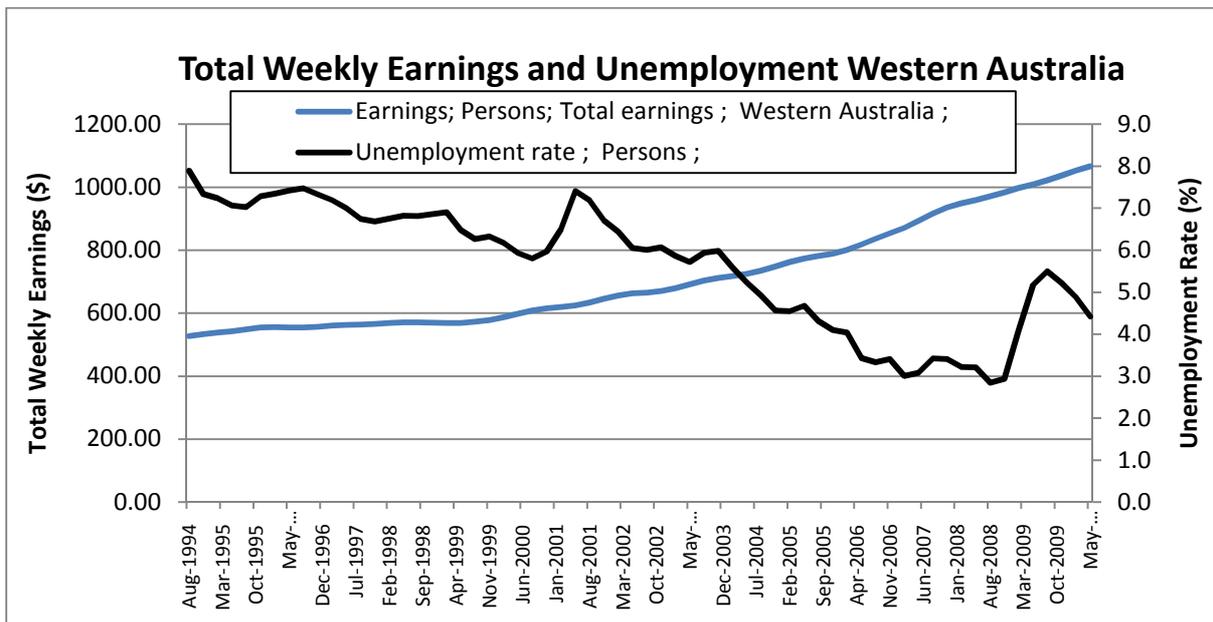
Figures 2, 3 and 4 describe the growth in population, employment and earnings. These economic factors have been crucial. As discussed later in the paper, land and housing supply has failed to keep pace with demand in the many regional towns, particularly those near mining resources. The expansion of mining based activities drew, and continues to draw, significant employment to many regional towns with population following the well paid resource jobs. Population flows have come principally from overseas migration. This has primarily been skilled labour and often individuals with the capacity to purchase property.

Figure 2



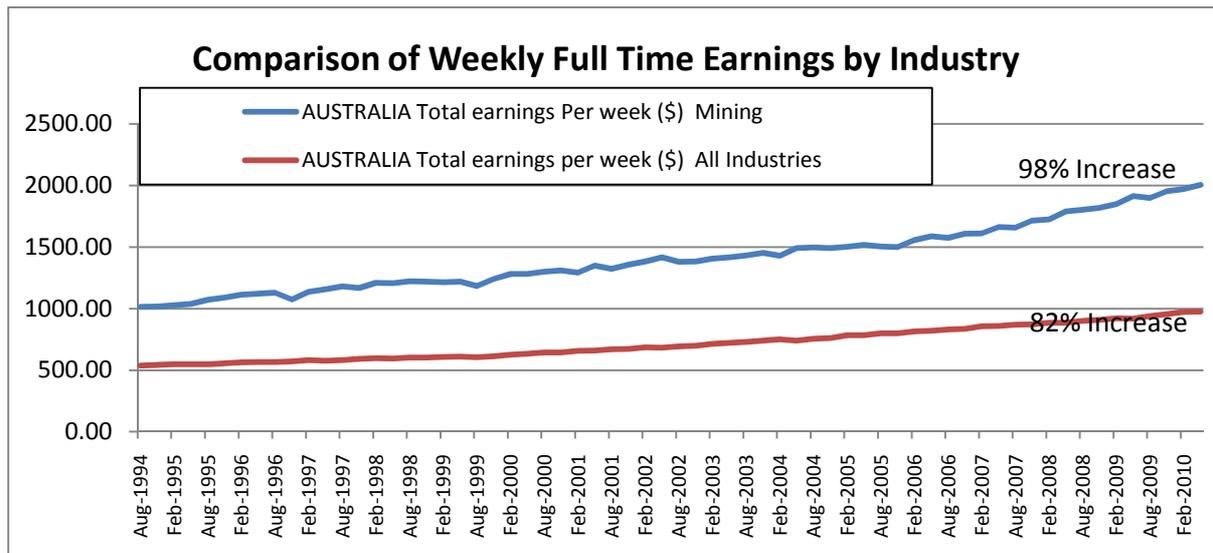
Source: ABS Cat No. 3101.0 - Australian Demographic Statistics

Figure 3



Source: ABS Cat no. 6302.0 Average Weekly Earnings, Australia

Figure 4



Source: ABS Cat no 6302 table 10I

Figure 3 shows the steep growth in earnings in WA with the related decline in unemployment from 8% in 1994 to a low of below 3% in August 2008. The rapid rise in earnings has attracted workers into the resources industry. Mining incomes rose by 98% over a period of 15 years and are now double those of average earnings for all other industries (figure 4).

Table 2 highlights the impact the strong economy has had on 3R housing markets through house price growth rates. The table reports data for some of the key towns within regional WA; those in bold italics are resource towns or resource support towns, for example Geraldton where housing demand has been driven, particularly by investors, by the prospect of the development of the Oakagee port. Overall in WA population growth was 11% over the period 2005-2009 but this figure has been exceeded by a number of 3R towns. Many of the ABS population figures underestimate population growth in mining towns. Population growth in a specific town is largely limited by the availability of accommodation and many of the mining towns have increased population through fly in fly out workers but these workers are not counted within the census or other ABS data. The population figures highlight how the vast majority of regional towns have seen population growth, unlike other States.

Table 2: Regional, Rural and Remote Housing Market Growth

	Median House Price March 2010	Growth 2005-2010	Population Growth 2005-2009
<i>Ashburton (Tom Price)</i>	\$433,000	292%	3%
<i>Newman (East Pilbara)</i>	\$565,000	277%	20%
Corrigin	\$190,000	230%	6%
Merredin	\$184,000	192%	-2%
<i>Boddington</i>	\$360,000	186%	9%
Moora	\$154,000	180%	-2%
<i>Collie</i>	\$250,000	175%	2%
<i>Karratha</i>	\$800,000	171%	11%
<i>Coolgardie</i>	\$145,000	164%	-2%
Narrogin	\$248,750	163%	4%
<i>Port Hedland</i>	\$685,000	156%	10%
Northam	\$279,500	130%	7%
Carnarvon	\$275,000	129%	0%
Bridgetown	\$328,500	127%	7%
<i>Geraldton-Greenough</i>	\$416,000	125%	11%
York	\$320,000	121%	9%
Manjimup	\$255,000	116%	2%
Harvey	\$285,500	107%	19%
<i>Kalgoorlie-Boulder</i>	\$350,000	106%	8%
Exmouth	\$475,000	100%	8%
Meekatharra	\$50,000	100%	-8%
<i>Ravensthorpe</i>	\$235,000	93%	39%
Broome	\$684,000	87%	13%
Denmark	\$382,000	82%	10%
<i>REGIONAL WA¹</i>	\$395,000	80%	11%
Esperance	\$375,000	79%	5%
<i>PERTH METRO REGION¹</i>	\$500,000	75%	11%
Albany	\$392,000	70%	8%
Dardanup	\$321,000	66%	24%
Augusta/Margaret River	\$555,250	59%	11%
Mandurah	\$400,000	51%	20%
Bunbury	\$361,750	51%	9%
Busselton	\$455,000	44%	17%

¹ Population figure relates to the whole of WA

Source: REIWA Market Update (2010), ABS Cat No. 3218.0 Regional Population Growth, Australia

Total five year price growth was 80% within regional WA, 5% higher than the Perth Metro area. However, there were some towns, particularly the mining towns and the more affordable locations, where price growth was well in excess of 100%. The key mining towns of Port Hedland, Karratha, Tom Price and Newman have median prices near or in excess of the Perth Metro region despite their remote locations and challenging climate. Growth is continuing in these locations as mining workers seek accommodation and compete with investors looking to cash in on net rental returns. Strong rental

returns, often well above 7%, are achievable from rents inflated by a lack of available rental property; returns far superior to the Metro region. These returns attract investors from within and outside the State.

Outside the mining sector there are locations which are traditionally agricultural in nature but have grown tremendously. These are locations where house prices were very affordable by WA standards at the start of the 5 year study period (under \$150,000). Even after significant price growth towns such as Corrigin, Merredin, Moora, Narrogin and Northam remain affordable for households on median incomes. This affordability has attracted purchasers, if not necessarily population. The population growth figures would suggest that investors have been snapping up housing because of its price relative to the rest of WA in the expectation of capital growth. The more expensive, traditionally sea and tree change towns have seen the lowest price growth although, conversely, some of the highest population growth as purchasers actually move into these locations rather than simply purchase for investment purposes.

Of course this significant price growth has serious implications for housing affordability. Table 3 examines the price:income ratios for the selected 3R towns. Table 3 is based upon 2006 ABS household income data from the Census adjusted using earnings data to approximate 2010 household incomes. Median house prices are derived from the Real Estate Institute of Western Australia. The price:income ratio in Denmark is very high not because the median house price is especially high (\$385,000) but because household incomes in Denmark are low due to the reliance of tourism jobs and the associated low earnings. Broome is the most unaffordable location due to a combination of low incomes (through tourism) and very high house prices due to the demand for holiday accommodation and from employment in industries located around the town. The situation is likely to deteriorate with the new Kimberley gas hub at James Price point, close to the town.

Traditionally the price:income ratio has been around 3 in Australia. There are only 8 of the 31 locations with a price:income ratio below that level. These low ratios are due to high incomes relative to housing costs in the case of Tom Price, Kalgoorlie-Boulder and Ravensthorpe but low house prices in the other 5 locations.

The table also assesses the situation for indigenous households. The census data records incomes for indigenous households in specific locations with a high concentration of such households. In all cases indigenous incomes were lower than overall median incomes but, of course, the majority still have to compete for owner occupied housing on the open market. This results in much higher price:income ratios with Broome remaining the most unaffordable town and totally out of reach for indigenous households with house prices 14.59 times median incomes. The most affordable location was Meekatharra which is a housing market dominated by specialist indigenous housing.

Table 3: Price:Income Ratios

	Price:Income ratio	Price:Income ratio Indigenous Households
Broome	8.01	14.59
Augusta/Margaret River	7.53	
Denmark	6.75	
Busselton	5.99	9.04
Exmouth	5.96	
Mandurah	5.61	7.44
<i>Perth Metropolitan</i>	5.61	8.56
Albany	5.41	8.07
Geraldton-Greenough	5.27	
<i>Regional WA</i>	5.07	
Karratha	5.05	8.28
Esperance	5.04	6.48
Port Hedland	4.84	9.76
Bridgetown	4.68	
Bunbury	4.63	6.78
York	4.55	
Boddington	4.28	
Northam	3.98	5.68
Dardanup	3.79	
Carnarvon	3.71	5.89
Manjimup	3.7	6.17
Newman (East Pilbara)	3.35	4.33
Harvey	3.33	4.34
Collie	3.15	5.02
Narrogin	3.03	
Kalgoorlie-Boulder	2.96	5.34
Ravensthorpe	2.88	
Ashburton (Tom Price)	2.63	
Corrigin	2.59	
Merredin	2.37	3.98
Moora	1.98	3.21
Coolgardie	1.38	2.06
Meekatharra	0.74	1.17

Source: REIWA market update and author's calculations

The price:income ratios suggest a chronic affordability problem within many 3R housing markets. One of the problems has been the failure of the housing market to respond to increases in demand. Problems with native title, an unresponsive planning system, a State government unaware of the problem, a resources industry unable to inform planning authorities of anticipated demand and competition for skilled labour have all prevented a large scale supply response.

Case studies - Housing market outcomes in 3R WA

This section describes the outcome of four case studies undertaken in 3R towns in WA and highlights the key issues faced by each town, pronominally as a result of housing market failures.

The Pilbara - Karratha

The Pilbara economy is dominated by iron-ore mining although in the last decade oil and gas exploration has spawned the development of numerous large scale energy projects. Nearly all the Pilbara's working population is now employed in the resources sector and the industries that support it. Less affluent industries such as retail, service, entertainment and childcare which pay significantly lower wages than the mining sector have all been marginalised and struggle to survive making many of the towns dysfunctional for lack of services.

The public sector, particularly key workers, struggle to compete and under current conditions (intense competition for accommodation, differentials in remuneration between the resource sector and other non-mining businesses and expensive infrastructure), places such as the Pilbara region have become a mono-economy, dominated by mining and associated activities. There are new initiatives to provide housing for key workers to address the chronic shortages in key services such as health, law enforcement and education.

Land suitable for development has not been released by government in a timely manner due to both poor planning and insufficient consultation between government and the resource companies to gauge demand. Government agencies complain that the mining companies do not provide sufficient notice of housing and land requirements to allow a suitable and measured land supply response.

Karratha is the main town within the Pilbara. Between 2005 and 2010 price growth was over 170%, although much of this occurred up to 2007 with prices remaining relatively stable between 2008 and 2009 due to the GFC but worryingly are starting to rise again. Only about 31 per cent of houses are owner/occupied with the remainder either owned by government, the corporate sector or by private investors. The median house price in Karratha was \$800,000 in March 2010, \$300,000 above the Perth metro median. Modest three bedroom homes are selling for over \$1million. The rental market is also under extreme pressure due to a growing population and the rising costs of owner occupation. Rents for modest houses are in excess of \$2,000 per week and rents per bedroom in shared houses are over \$500 per week, double the State median rental price for a whole house. The pressure for housing in resource boom towns has had a significant impact on the availability of housing for indigenous people and those residents, or would-be residents, for whom housing is either not provided or not subsidised by the resource companies or government, most particularly small business and retirees. There are implications for economic growth and competitiveness as a potential workforce is unable to relocate to the area in search of employment.

Boddington

The small town of Boddington was established in 1912 to service an area of broad acre mixed cereal crop and sheep farming approximately 125 kilometres south east of Perth. When the re-opening of the Boddington gold mine was first mooted in 2005, the Peel Development Commission worked with the Shire, the mining companies and different government agencies to ensure there was adequate infrastructure for mining, population and community expansion. The local infrastructure was set to cope with the considerable expansion of the mines and the community. Immediately after the decision to re-open the mine, house prices and land in and adjacent to, the town escalated in value. Housing stock increased in value by 275% in the decade 1998-2008, the greatest rise in value occurring between 2004 and 2008 (220%) (Rowley and Haslam McKenzie 2009). The median house price in Boddington in 2010 was \$360,000, which, while less than that of Perth (\$500,000), is still one of the most expensive non-metropolitan housing markets in the State.

Boddington struggled to cope with the population influx and the unmet demand for accommodation. The primary reason being the announcement of the mine's re-opening coinciding with the housing and land squeeze in Western Australia resulting from the GFC. This was also the time when the resource sector in Western Australia was at a peak in the construction and production cycle, drawing many of the trades and tradespeople into the Pilbara and Mid West regions where unprecedented payment rates were being achieved. The largest development companies are still struggling to obtain finance and have not proceeded with large scale land development. The unfortunate timing has shaken confidence in the Boddington land and housing markets, causing supply to falter despite demand. As a consequence, the mining companies have encouraged employees to drive-in/drive-out (DIDO) from the urban fringe or from nearby rural communities, even though the biggest employer has stated it favours a local residential workforce. This has implications for the affordability of smaller towns surrounding Boddington.

Denmark

Denmark town is small but picturesque town on the south coast of Western Australia established 120 years ago for timber milling. It is located 55 kilometres east of the large regional centre of Albany and 420 kilometres south east of Perth. Milling ceased in the early 1900s and small scale broadacre farming became the principle industry (Brunger and Selwood 1997).

The population rose by 10% during the period 2005-2010 reversing the decline earlier in the decade. The Shire is dominated by older people and has the second highest proportion of 55+ aged people in the State (Australian Bureau of Statistics 2007a). The census age profile also shows that there are many children under the age of 17 years in the Shire (24.5%). Many people come to Denmark seeking a lifestyle sea/tree change and the Denmark community brands itself as a 'Green Community' and strongly resists large scale development and housing densification. Denmark has a higher than State average proportion of the population who have low incomes (Australian Bureau of Statistics 2007b).

In 2010 the median house price in Denmark was \$382,000. Based on median incomes for the Shire, housing in Denmark is unaffordable for many local residents whose median income is well below the metropolitan median. In Denmark the price:income multiplier is 6.75. The sea/tree change status of the town and local amenity has pushed up house prices. The local government authority reported that 43% of all rate payers in the Shire do not live locally and approximately 52% of homes in the Shire are second homes, most of which are unoccupied for much of the year.

Although most housing in the Shire is not affordable for low income earners and there has been a stated need for affordable housing, a recent development of 12 donga-style 4 x 2 houses each on 200 square metres has been deemed 'unacceptable' by the community because the houses are "too dense, too cheap and too suburban" (case study interviewee). However, there has been limited public housing investment in Denmark in the last three years and there is no sign of an imminent increase in the supply of affordable housing.

Kalgoorlie-Boulder

Kalgoorlie-Boulder, approximately 600 kilometres east of Perth, was established in 1892 as a result of a gold rush. Having a diversified local economy, Kalgoorlie-Boulder has a stable, but growing labour market, most of which is sourced locally with only a small proportion FIFO.

Kalgoorlie-Boulder is regarded by real estate agents operating within the city as an affordable city with a strong market for first time buyers. Not only are median household incomes well above those in the Perth metropolitan area but median house price is \$150,000 lower. The city also contains a diverse housing stock ensuring a range of housing products not only for first time buyers but also for those moving up the housing ladder. The affordability of the local market enhances labour mobility and ensures a good supply of staff for local businesses. House prices in Kalgoorlie-Boulder exhibited

modest growth in the 10 year period between 1994 and 2004. However, prices have doubled since 2004 largely as a result of the markets affordability attracting strong demand from investors, first time buyers and a lack of new supply. Although still regarded as an affordable market, continued upward pressure on prices will have a negative impact on the formation of new households and the inward migration of new workers. Although the market has a long way to rise before it approaches price levels witnessed in Karratha there is a worrying lack of new housing supply in the City.

Thirty one per cent of all property within the Kalgoorlie-Boulder housing market is rented stock. Despite the relatively large proportion of the total stock within the rental market, real estate agents reported a chronic shortage of available property. This has resulted in sharp rent rises. The State government agency, Landcorp, is the main supplier of serviced land in the City. There have been complaints that land has been slow to come to market, prices have escalated and that government has profited excessively from the land shortage in the City.

Conclusions and Policy Directions

Much has been written about the Australian capital city housing markets in the media and academic circles, but there is relatively little known about the housing market outside cities. What is clear however is that it is a mistake to presume the 3R housing markets are either affordable or homogenous. In Western Australia, 3R communities are usually modest in population but spread across large distances and even relatively small changes in housing demand can have a significant impact very quickly due to the isolated nature of the town with no substitute housing market nearby to absorb some of the demand. Housing markets are inextricably linked to local economic conditions and social, cultural and environmental circumstances. Even in communities which are not connected to a mining community, such as Denmark on the south coast, there are significant housing issues due to high demand and insufficient supply of housing appropriate to the demand. This paper has shown how the increase in population across the State has impacted on the demand for housing and it is evident that housing supply, and to some extent, the necessary infrastructure at the local level to support both increased local populations and housing, has been inadequate.

The common housing concerns identified include the under supply, high cost and variable standard of housing as well as the mismatch between local needs and housing types and inequities in the social distribution of housing benefits. In addition, the supply of public housing, especially for those who are marginalised by market forces, is inadequate. The nature and magnitude of housing stress differs among 3R communities depending upon a) proximity to a growth industry, such as mining; b) access to development-ready land; c) the size, diversity and stability of the local economy; d) access to finance and building capacity; and e) long term planning for infrastructure, residential and commercial growth. Some of the extremes in the cost of housing in Karratha in the Pilbara for example, may be explained by its remoteness and therefore higher costs of construction. However, organisations have failed to respond to demand pressures for a variety of reasons and prices have risen dramatically in the wake of unprecedented demand. When compared to Boddington for example, where agencies and community decision makers responded quickly to likely infrastructure and land requirements when the announcement was made regarding the upgraded gold mine, it is evident that Karratha's dire housing problems are largely due to inadequate planning and lack of responsiveness to market indicators by government agencies. Boddington on the other hand was a victim of peculiar economic circumstances.

Housing is inextricably linked to the functionality of communities and balanced housing markets are crucial for the overall sustainability, vitality and future local economic growth of regional communities. This paper has shown, using a diverse range of communities based in rural, regional and remote locations, that housing in non-metropolitan Western Australia is under considerable pressure and that without careful policy attention, the social and economic sustainability of some of these communities is threatened. Policy makers need to understand the different challenges faced by 3R housing markets and understand that a one policy fits all approach is inappropriate in dealing with

the challenges faced by these towns, many of which are crucial to the continued strength of the WA economy.

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