



TOURISM IN THE KIMBERLEY TO 2030

This briefing paper was commissioned by the Kimberley Development Commission and authored by Tourism WA. It examines the likely economic opportunities and planning, market and labour requirements of the Kimberley Tourism market out to 2030 – September 2014.

DRAFT FOR PUBLIC COMMENT

Tourism Briefing Paper



Tourism in the Kimberley

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The Kimberley Regional Investment Blueprint

On behalf of
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EXPERIENCE
EXTRAORDINARY
WESTERN AUSTRALIA

Tourism in the Kimberley

2030 Tourism Vision facts for the Kimberley

By 2030:

- Direct spend by visitors to the Kimberley will reach between \$700M-\$1B, annually
- 8000 people will be directly or indirectly employed in tourism in the Kimberley , including up to 1000 local Aboriginal people
- Broome will have international aviation services from South East Asia
- Broome and Kunurra will have direct aviation access from the East Coast
- The Kimberley's point of difference will be its capacity to deliver extraordinary Aboriginal cultural tourism experiences.

Western Australia's Kimberley region offers the quintessential Australian adventure experience where visitors can immerse themselves in ancient culture and in extraordinary landscapes surrounded by unspoilt wilderness under expansive blue skies. These enduring attributes make the Kimberley one of Australia's most iconic and aspirational holiday destinations that features extensively in State and Federal Government tourism marketing initiatives.

The Value of Tourism

The Kimberley attracts some 313,000ⁱ domestic and 35,600 international visitors annually accounting for approximately 2.5 million visitor nights and \$333Mⁱⁱ in visitor spend. Tourism is a significant industry driver for the Kimberley generating economic, social and employment benefits for the region's communities and people. Tourism related infrastructure, amenities, events and services provide legacies for regional communities adding to the social fabric of towns and making these centers more attractive places to live and work.

Tourism and hospitality offers employment opportunities at various skill and experience levels making it a versatile industry sector for regional development. It is estimated that in 2012 approximately 2,500 people were directly employed in tourism in the Kimberley and when indirect employment is added the estimate is in the range of 3,500 to 4,000.

The influence of tourism extends far beyond Kimberley towns and major communities, and into the region's vast rangelands and seascapes. Tourism creates much needed diversification opportunities to the pastoral lands, bringing prospects of new investment, new people and new ideas. It provides enterprise opportunities for Aboriginal people who comprise nearly half the region's population and a much larger proportion of those residents in remote community living areas. Tourism enhances sustainability prospects for conservation estate enabling visitors to access high quality natural and cultural experiences.

The Vision

The State Government's overarching *Strategy for Tourism in Western Australia* aims to grow the net contribution of this industry to \$12B by 2020. This target can be achieved through realising the Government's vision to position the Kimberley as Australia's ***premier epic adventure tourism destination***.

As one of Australia's 16 National Landscapes, the Kimberley region already boasts strong tourism brand recognition, particularly in the Australian and key UK/European markets based on the perception that the region is uncrowded and unspoilt, a vast wilderness landscapes with a strong connection to people and culture.

Through a range of innovative projects, including the *Kimberley Science and Conservation Strategy* and the *WA Caravan and Camping Action Plan 2013-2018*, the Government is on-track to deliver on its vision of creating a truly inspirational Kimberley tourism destination. The vision comprises:

The Government aspires for a Kimberley region where *infrastructure and investment nurtures connectivity and expands the inventory of tourism experiences, with:*

- Broome as the domestic and international aviation gateway to the western Kimberley region delivering a vibrant multi-cultural destination that attracts investment in exciting attractions, activities, events and facilities that meets the needs of the broad range of visitor types
- Kununurra as the eastern aviation and road gateway to the spectacular World Heritage listed Bungle Bungle Range, the extraordinary Lake Argyle and the majestic Cockburn Range
- Broome as an attractive cruise destination accommodating large cruise vessels (portside) and supporting a thriving high yield Kimberley coast micro-cruise market
- Halls Creek strengthened as the transport conduit to the rest of Australia through an all-weather Tanami Track and well marketed Canning Stock Route
- The Kimberley as an aerial-highway destination providing a network of small airstrips in vicinity of spectacular attractions and quality accommodation offerings.

The Government aspires for a Kimberley region where *self-drive journeys and guided tours* are undertaken along well established regional tourism corridors offering a broad range of quality infrastructure and services:

- Wyndham, Halls Creek, Fitzroy Crossing and Derby provide a range of accommodation types and visitor services with each centre developing its own point of difference in the region
- A distribution of quality serviced commercial caravan and camping grounds provide visitors the opportunity to disperse to all parts of the region
- A string of conservation estates harboring the region's natural and cultural icon attractions are managed in a way that permits access for visitors but maintains their unique values
- Roadside amenities and facilities provide for comfort and safety of self drive visitors

The Government aspires for a Kimberley region where *local people have equity and actively participate in tourism and hospitality* in the region:

- Traditional Owners as well as other Aboriginal stakeholders have financial equity in visitor accommodation and in the broad range of tourism experiences and services
- Income from tourism and hospitality ventures makes an increasing contribution to the economic and social fabric of regional and remote Kimberley communities
- Local Aboriginal people and the broader local community is increasingly represented in employment in the range of tourism and hospitality workplaces across the region
- Pastoral lease holders are able to enjoy the social and economic benefits of tourism and hospitality and can actively attract third party investment and involvement in tourism ventures

The Government aspires for a Kimberley region where a suite of *exciting and innovative nature and culture based experiences* are available to secure close encounters of the region's unique environment

- Aboriginal tourism enterprises provide a range of unique quality cultural interpretations of land, life, history and politics for the region
- Iconic walking excursions into wild and remote Kimberley landscape are available as independent as well as guided experiences
- Aboriginal art trails provide inspiration to visitors and establishes economic, employment and profiling opportunities for Aboriginal artisans
- A range of quality exclusive eco lodges and retreats are available across the region providing an alternative to campground accommodation options

The Government aspires for a Kimberley region that *lives and breathes the Kimberley brand*

- Government and industry tourism planning activities, policies and instruments give consideration and reflect the essence of the Kimberley brand
- Land is identified, zoned and preserved ahead of future tourism infrastructure requirements
- Government and industry collaborate and co-ordinate their marketing and awareness initiatives to safe guard and leverage the Kimberley brand

Activating and achieving the Vision

To realise this aspirational tourism vision for the Kimberley region will require Government, the tourism industry, supporting industries and the community to unify and work collaboratively to plan, invest, deliver and promote a range of essential infrastructure and services.

Specific initiatives that Government and industry will focus on in the next 4 years

Broome

- Improving direct air services to Broome from multiple domestic ports creating high traffic volumes to support more buoyant shoulder and green seasons.
- Planning, funding and constructing a range of quality recreational infrastructure in Broome including a boardwalk connecting Chinatown to a lagoon pool facility at Town Beach that is activated along the route with commercial offerings.
- Planning, funding and constructing of an extended and strengthened Broome Port wharf to enable regular visits from large cruise vessels (including voyager-class cruise vessels).
- Planning, funding and constructing Broome's recreational boating marina to support a vibrant recreational marine industry and the micro-cruise industry.
- Supporting the development of a new 5 star caravan park in Broome through the Landbank program and the Caravan and Camping Action Plan.

The Kimberley

- Planning, funding and constructing an iconic Cockburn Range Walking Trail – a multi-day international standard walk trail that connects extraordinary landscape experiences.
- Planning, funding and developing Windjana National Park as a vibrant central Kimberley must-see destination with an innovative multi-media attraction depicting the Jandamarra story, high end eco resort, expanded affordable campgrounds and quality Aboriginal touring.
- Through the Caravan and Camping Action Plan and KSCS project, delivering a network of quality camp grounds across key drive routes including the Gibb River Road, Kalumburu Road and the Great Northern Highway.

- Delivering the *Kimberley Wilderness Parks* - the State's largest interconnected system of marine and terrestrial parks covering more than 3.5 million hectares protecting the region's unique flora and wildlife.
- Investigating and supporting the expansion and enhancement of major Kimberley events (ie Kimberley Moon, Shinju Matsuri) to build the profile of the events and appeal to a broader market.
- Maintaining the Gibb River Road and linked 4WD expedition routes as off-road, unsealed wilderness tourism drive adventures.
- Working with Government to facilitate visitors and commercial tourism operator access to Crown Land in particular pastoral leases.
- Extending Aboriginal people/community involvement in tourism beyond the KSCS with the next innovative approach targeting - workforce engagement, new business enterprise development, continued capacity building with key existing businesses, joint venture business opportunities in areas of accommodation and touring, leveraging indigenous art through the creation of Aboriginal art trails and facilitating new and exciting Aboriginal experiences and attractions that help provide the region with its point of difference.
- Fostering Aboriginal leadership and excellence in the drive to achieve high levels of engagement and success in tourism.
- Through the KSCS project, continuing to enhance and promote the Kimberley Aerial Highway as a premier touring experience to disperse high yield visitors the width of the region connecting extraordinary places.
- Positioning the Kimberley so that it features much more prominently in the next phase of the *Experience Extraordinary* brand marketing journey with a continued tactical focus on generating visitation to Broome and beyond particularly during the shoulder seasons.

Kimberley Tourism in 2020-2030

The Government and industry initiatives specified for the next 4 years have the capacity to progress Tourism WA's vision and aspirations for Kimberley tourism so that the region can play its part in and benefit from Western Australia becoming a destination of choice for intrastate, interstate, and international visitors. The Kimberley figures prominently in the State vision.

Tourism WA projects that by 2030:

- Direct spend by visitors to the Kimberley will reach \$700M-\$1B annually, maintaining tourism as a significant contributor to the region's economy
- The number of people directly and indirectly employed in tourism is projected to reach 8,000.
- Up to 1000 local Aboriginal people will be working or sustained in a range of tourism enterprises ranging from direct employment in mainstream hospitality and tourism services, to operating individual or joint-venture businesses.
- Although the Kimberley will remain a popular destination for an affordable holiday, the range of more exclusive and more expensive options like eco lodges and niche cultural experiences will have increased
- Broome will have further expanded its accommodation options and positioned itself as both an important national aviation hub and turn-around port for the cruise ship market
- Kununurra will have improved its gateway credentials by establishing direct flights to South Eastern seaboard cities

- Halls Creek will emerge as a third regional gateway as a result of increased self-drive traffic entering the region via the Tanami Track
- A selection of Aboriginal cultural themes like immersing in lifestyle and culture on the Dampier Peninsula, experiencing ancient rock art and sharing the Jandamarra story, will have developed to the point where they are recognized as nationally significant icon attractions
- A wide dispersal of affordable as well as niche market accommodation options will have emerged on Aboriginal lands, conservation estate, and cattle stations
- The proportion of international visitors to total visitors will have increased

These forward projections show the Kimberley growing the value of tourism. Fast forward to 2030 and the foundations developed today will have been built upon and the tourism landscape of the Kimberley will have significantly changed. Tourism WA projects that by 2030 Broome could be an international aviation gateway with services to Southeast Asia and this would have significant implications for visitation to the region. The aim is for Broome to continue to be a turn-around port for cruise vessels, and for the region to be internationally recognized for remote area high end niche accommodation and cultural or environmental experiences. By 2030 Aboriginal cultural themes should have developed to the point where they present a point of difference for Kimberley tourism and Aboriginal people play a significant role in the Kimberley's tourism workforce and in tourism business ownership.

The tourism outcomes envisaged for 2030 present wide ranging opportunity but also challenges for the Kimberley. That level of tourism growth comes with substantial employment requirements both directly and indirectly into tourism.

The challenges for tourism in 2030 and beyond will be everything from assembling and releasing land, opening new aviation routes and building regional infrastructure and amenities, to providing affordable housing, training and health services. It will mean preparing towns and remote communities for the social and economic opportunities and challenges. It will require commitment of resources to the management of iconic attractions within conservation estate. It will mean up-skilling Aboriginal Traditional Owners to take advantage of opportunities and to manage access of visitors onto Native Title lands.

To orchestrate this growth will require the local tourism industry to take leadership - to make brave and bold decisions that will drive innovative change and progress. This will require the industry to recognise and promote the value of tourism message to the broader community demonstrating the extensive list of regional benefits that tourism can generate for the Kimberley. It will require the industry to work with local and State Government to ensure that plans are integrated at a local and regional level, and that they are consistent with the objectives of the State Planning Framework.

In Summary

The Government views the Kimberley as one of the State's most valuable tourism assets that plays a significant role as an aspirational attractor capturing the imagination and interest of domestic and international visitors to travel not only to the region, but to Western Australia. The role for Government, the tourism industry and the community is to plan, invest and deliver the essential infrastructure and services so that the Kimberley region can reach its vision and can deliver on the promise of a truly extraordinary holiday destination

ⁱ Vis No. - IVS and NVS, Year Ending Dec 2010/11/12 Average

ⁱⁱ Vis Exp - IVS and NVS, Year Ending Dec 2010/11/12 Average. Note: Spend estimate is based on average spend per night for Western Australia (YE December 2012) and 3 year average visitor nights (YE December 2010/11/12) for the Kimberley Development Commission.