Regional Development Australia
KIMBERLEY

# Tourism Industry

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## Map of the Kimberley Region


### Legend

- Sealed major road
- Sealed minor road
- Unsealed road
- 4WD track
- 4WD track only
- National highway
- National route
- Marine park boundary
- Reef
- Conservation park
- Marine park
- National park
- Airport
- Local Government Area boundary

### Approximate driving distances (km)

| | Perth GNH | Perth NWCH | Broome | Derby | Fitzroy Crossing | Halls Creek | Wyndham | Kununurra | Darwin |
|---|---|---|---|---|---|---|---|---|---|
| Perth GNH | - | - | 2237 | 2391 | 2565 | 2843 | 3197 | 3202 | 4039 |
| Perth NWCH | - | - | 2374 | 2528 | 2701 | 2990 | 3345 | 3349 | 4176 |
| Broome | 2237 | 2374 | - | 221 | 395 | 683 | 1037 | 1042 | 1869 |
| Derby | 2391 | 2528 | 221 | - | 259 | 547 | 894 | 899 | 1733 |
| Fitzroy Crossing | 2565 | 2701 | 395 | 259 | - | 289 | 642 | 647 | 1474 |
| Halls Creek | 2843 | 2990 | 683 | 547 | 289 | - | 354 | 359 | 1186 |
| Wyndham | 3197 | 3345 | 1037 | 894 | 642 | 354 | - | 100 | 929 |
| Kununurra | 3202 | 3349 | 1042 | 899 | 647 | 359 | 100 | - | 829 |
| Darwin | 4039 | 4176 | 1869 | 1733 | 1474 | 1186 | 929 | 829 | - |

*GNH = Great Northern Highway, NWCH = North West Coastal Highway*

## Executive Summary

***This regional brief outlines the state of the Tourism industry, its opportunities, and its challenges and highlights recommendations to enable long term sustainable growth of the sector for the betterment the Kimberley and its people.***

The Kimberley is an iconic holiday destination. The tourism industry represents 10% of gross revenue generated by 500 businesses and directly employs 12% of workforce, with many other indirect flow-on benefits across the region.

The pristine wilderness and natural environment, along with authentic Indigenous cultural experiences are the main visitor drawcards, attracting 400,000 visitors annually - 91% domestic and 9% international. However, there has been minimal growth in these numbers over the last 5 years.

The regions monsoon climate dictates high seasonal fluctuation in visitation – many businesses slow down or shut for up to five months of the year.

The development of a unified regional brand for all stakeholders to utilise could increase destination profile and product recognition. There is opportunity to better activate the regions national parks and develop more indigenous cultural experiences, encourage more high yield cruise market visitation and business events to the region.

Barriers to industry growth are primarily the prohibitive cost and poor connectivity of air access along with high on ground costs. Increasing competition from cost-competitive international destinations along with poor density and diversity of accommodation, dining, and nightlife options across the region are factors that affect industry growth. Australian Government's multi-agency regulations and approval process are onerous, expensive, and untimely and stifle industry development.

**RDAK Recommends:**

- Australian Government remove the current cabotage restrictions as they apply the air services to and from the Kimberley region for a three-year trial period.
- State and local Governmental support for direct flights from Melbourne to Kununurra and direct international flights from Broome to Singapore.
- Local, state, and federal government agencies align to create a bespoke regional brand.
- Australian Government to investigate approaches to activate the region's National Parks.

## The Snapshot

| | | |
|---|---|---|
| 10% of the GRP generated by 500 businesses. | Employs 12% of workforce. | 400,000 visitors annually - 89% domestic, 11% international from key international. |
| Pristine wilderness and natural environment, authentic Indigenous cultural experiences. | Strong intrastate, lower interstate, limited international awareness levels. | Monsoon climate dictates high seasonal fluctuation in visitation. |
| High cost and poor connectivity of air access. | Low product density combined with vast distances between attractions discourage visitation. | High on ground costs of accommodation, tours, and experiences comparative to other tourism destinations. |
| Multi-agency regulations and approval process are onerous, expensive, and untimely. | Global cruise market and Business Event Sectors present growth areas. | Better activate terrestrial and Marine National Parks. |

## The Kimberley

Covering nearly 423,000km2, the unique natural environment of the Kimberley provides a strong basis for Australian tourism experiences of coastal cruises, 4WD adventures, and authentic indigenous cultural interactions.

The Kimberley is renowned for the pristine environment and immense, diverse landscape of majestic rivers and floodplains, ancient cave systems, spectacular gorges and thundering waterfalls along with world-class beaches and rugged island archipelagos. It is home to 17 vast marine and terrestrial national parks, including several RAMSAR listed wetlands, the UNESCO World Heritage-listed Purnululu National Park, Mitchell River National Park, Geikie, and Windjana Gorge National Parks, Horizontal Falls in the Buccaneer Archipelago and the internationally acclaimed Cable Beach.

### Broome, Derby and the Dampier Peninsula

The southern gateway to the region, Broome's multicultural heritage, and world-famous Cable Beach are major tourist drawcards. Daily direct jet services access Broome from Perth (2.2 hrs) and Darwin (1.45hrs) and seasonal flights from Melbourne, Sydney, and Adelaide. Direct flights from Singapore will bring connectivity to SE Asia and onward global connections.

For 200 kilometres north of Broome, the Dampier Peninsula offers authentic Indigenous cultural activities, working pearl farm tours, and remote eco-glamping. Work to seal the Broome Cape Leveque Road is underway and critical to ensuring all-season access and the continued development of diverse, authentic indigenous products. Although it remains to be seen how this will be managed and is tempered by the local communities' desire to expand whilst retaining cultural integrity.

Located 200km east northeast of Broome, Derby is the gateway to the thousand islands of the Buccaneer Archipelago, the Horizontal Waterfall, and the western start point for the iconic Gibb River Road 4WD route.

### Fitzroy Crossing and Halls Creek

The small township of Fitzroy Crossing is 400km east of Broome, offering access to Windjana Gorge and Geikie Gorge National Parks and Indigenous cultural experiences. 300kms east of Fitzroy Crossing, Halls Creek has a strong gold mining history and is the closest township to access UNESCO World Heritage-listed Purnululu National Park and the ancient meteorological site of Wolfe Creek Crater.

### Kununurra and Wyndham

Kununurra is the eastern gateway to the Kimberley, accessed by the national Victoria Highway from the east and serviced by jet flights from Darwin and Broome (>1 hour) and Perth (3 hours). A trial of direct flights from Melbourne commences in May 2020 to encourage increased interstate visitation.

Kununurra is a popular base to explore the ancient Purnululu National Park, Lake Argyle, and the Ord River and is the start/end point for many extended 4WD tours. Barramundi fishing and viewing the Ord Irrigation Scheme are also popular tourism interests. Wyndham is a small historically important port centre situated on the Cambridge Gulf and the departure point for luxury coastal cruise expeditions. The Gibb River is an iconic 4WD route boasting gorges, working cattle stations, and wilderness parks offering homestead, camping, and eco glamping opportunities.

## Industry Overview

Recognised as a 'specialised tourism region' attracting nearly half a million domestic and international visitors annually the Kimberley has one of the highest visitors spend per capita in the country (average annual visitor spend $14,455 per person), ahead of regions such as Tropical North Queensland (average annual visitor spend $12,940 per person[1]).

The tourism sector accounts for an estimated 12% of regional employment[2] and nearly 10% of gross regional revenue, although hard to define, the flow on effect from visitation realises a much greater economic contribution. There are 500 business directly involved with many additional indirectly associated companies gaining value from visitation[3].

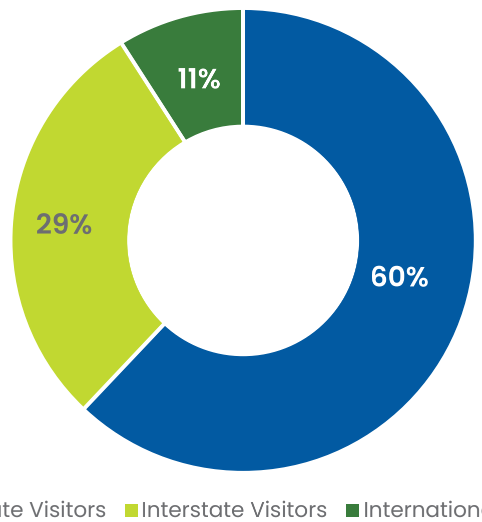
### Visitor Numbers

The region hosted 593,000 visitors in 2017[4] , of these 255,300 are intrastate visitors accounting for 60%, followed by 29% interstate visitors with international making up the remaining 11%. Visitors stayed on average, six nights and spent $163 per night (2008-2018).

Visitation rates grew at approximately two percent per annum, led by the Shire of Wyndham East Kimberley (4%), Derby-West Kimberley (3.2%), and Broome (1.3%) while Halls Creek showed negative growth (- 2.7%).

Concerted efforts by tourism industry campaigns, increased profile for regional events, and the recently trialled discounted airfares from Perth to Broome are the drivers for this marginal growth.

Av 2015-2018 Visitors By Origin




### Seasonality

With a semi-arid monsoon climate, the characteristic wet and dry seasons offer different opportunities and attractions for tourists and some limitations to tourism operations.

The dry season (May to October) brings warm, dry conditions to much of the region and is the peak time for activity, events, and visitation.

The wet season (November to April) brings higher temperatures, humidity, heavy rainfall, and occasional cyclonic events, offering a different experience and landscape. However, restricted access and low visitor numbers see many key attractions and businesses in full shutdown or low use for up to four months. The routine shutdown each year is the sharpest anywhere in Australia[5]. There is a general market perception that the Kimberley is undesirable during the wet season impacting business viability, potential investment, and ongoing development. Yet, although unquestionably hot and humid, the wet season can offer an entirely different experience.

Improvements to crucial access roads such as the Broome Cape Leveque Road, Tanami Road, Duncan Road will have a positive impact on access. However, additional investment in the development of all-season infrastructure and attractions is vital for growth.

Extending shoulder seasons by encouraging lower rates, offering elevated, small group experiences, and capitalising on corporate and incentive markets can provide operators with extended trading windows and soften the region's seasonal profile.

### Industry Regulations

Government policies, regulations, and incentives have a significant impact on the tourism sector and can play a key role in encouraging growth. Tourism industry operators are subject to many rules, including provisions from over seven state and federal government acts.

Many permits and licences apply to general business regulation, including planning and building regulation, labour supply, taxation, liquor licensing, food hygiene, occupational health and safety, and visitor access passes recently introduced by native title groups. Regulatory barriers faced by the tourism industry are high in comparison with other sectors and countries which is challenging and costly for operators and potential investors[6].

[1] ATEA Kimberley Snapshots 2020
[2] Kimberley Development Commission
[3] Austrade/ Tourism Research Australia 2018
[4] Tourism WA Visitor Fact Sheet 2018
[5] See ref 1
[6] Tourism Investment and Regulation Review Final Report – Austrade 2012

## Market Segments

The tourism market is divided into domestic (91% of visitation) and international (9% of visitation) and further subdivided into low and high expenditure tourists. 65% of intra and interstate visitors are considered high expenditure visitors accessing the region by air and up taking accommodation, vehicle hire, organised tours, and dining options. The remaining 35% is generally the lower expenditure backpacker and caravan travellers who spend less per day but stay for extended periods.

### Domestic Market

The Kimberley destination has a relatively strong intrastate profile - research showing a high awareness of location, climate, natural attractions, and key visitor experiences. However, its perceived to be expensive in comparison to other destinations, therefore market growth and return visitation is low.

Interstate segment awareness is comparatively lower, with key attractions of Cable Beach and the Bungle Bungle Range along with bucket list experiences of luxury coastal cruising and extended 4WD expeditions typically having greater awareness than the townships[7]. For many, it remains an aspirational destination with cost, distance, and lack of regional knowledge the cited barriers for visitation. Seasonal direct flights from Melbourne, Sydney, and Brisbane along with targeted marketed campaigns by regional and state tourism organisations are having some positive impact, however, overall growth is slow.

### International Market

International visitors make up 11% of the total tourism numbers. The key markets are the USA (15%), New Zealand (13%) Germany (13%) United Kingdom (11%) and France (6%)[8]. Current International visitors tend to stay for more extended periods but spend less per day than the domestic traveller – this is characteristic of the adventure - backpacking sector.

There is potential to grow the high-yield global luxury travel market who are willing to pay higher costs associated with accessing unique experiences offered in the region. This sector is generally time-poor and seeks authentic travel experiences combined with luxury accommodation and access by jet or helicopter[9].

The International market was engaged by the successful trialling of direct Singapore jet services into Broome in 2018. This uninterrupted service reduces flight and connection time by 11 hours, provides onward connectivity to other key international markets, and has increased the region's profile in SE Asia. Ongoing support for the direct Broome - Singapore air services is critical for global market growth.


### STRENGTHS

- Unique natural environment
- Indigenous Cultural values
- Aspirational destination
- Strong intrastate market reputation

### OPPORTUNITY

- Position as key region for indigenous Tourism
- Develop Business Events market
- Develop Cruise market
- Develop regional brand
- Activate National Parks and Cable Beach

### BARRIERS

- Connectivity and cost of air access
- Seasonal restriction
- Infrastructure underdeveloped
- Social issues
- Distance / services between attractions
- Land tenure & industry regulation
- Poor experience density

### RISKS

- Competition for other markets
- Impact of negative social behaviors
- Increasing native title Visitor Pass and other permits
- Changing market preferences
- Natural or environmental disaster

[7] Tourism Perceptions – Tourism WA
[8] Tourism Research Australia 2018
[9] ATEA Kimberley Snapshot 2020

# Industry Opportunities

## Indigenous Tourism

Indigenous culture is a crucial point of difference in today's highly competitive domestic and international tourism market, and the demand for authentic nature-based cultural interactions and activities continues to grow. International Indigenous Tourism visitation to Australia has surged by an average 9 percent per year since 2013, and this market spend 34% more per trip on average[10]. Research shows that 11% of international visitors uptake Indigenous tourism activities, however, the domestic demand for activities is much lower at less than one percent. The Kimberley is well-positioned to be Australia's pre-eminent region for Indigenous Cultural Tourism. However, given the percentage of domestic visitation, engaging the domestic market in activities is critical to ensuring business sustainability and long-term success. Likewise, engaging, training, and retention of the local indigenous workforce to deliver consistent, authentic product is pivotal in driving this market forward.

## Building Brand Value

Place or regional branding has become an increasingly integral part of regional economic development strategies in the global competition for business investment and growth. Regional branding supports the development of socially, culturally and environmentally oriented economies in areas that are interesting due to their natural and cultural heritage[11]. The Kimberley region is perceived as a unique, adventurous and pristine destination, attributes to develop into a single unified brand that tourism stakeholders could align behind and utilise.

## Activate Natural Attractions

Most natural attractions (e.g., Horizontal Waterfalls, Purnululu, Mitchell Falls, and many Indigenous rock art galleries) are situated in the regions 17 marine and terrestrial national parks. However, they are severely underutilised – for example the two largest national parks in Australia - Drysdale River National Park and Prince Regent National Park are presently unmanned and have no reliable access. These spectacular wilderness areas contain abundant native flora and fauna, unparalleled ancient rock art galleries, pristine water courses and natural waterfalls and have much potential to engage visitors.Development of appropriately managed, eco-sensitive infrastructure along with stronger stakeholder engagement with the state and federal agencies responsible for their management could better activate these tourism drawcards. Likewise, Broome's Cable Beach is world-renowned but underutilised; there is an opportunity to better activate by developing public trading opportunities, a small-scale retail strip, seasonal food vans, and additional adventure activities.

## Cruise Market

In addition to hosting Kimberley expedition vessels, Broome is becoming recognised as an exotic inclusion for extended itineraries with the larger cruise liner industry. In 2018, the cruise industry delivered $14.5 million economic output to the region, including an estimated $7.8m value-adding. 2020 will see 37 cruise ships scheduled into Broome, an increase of 19% from 2019[12]. There is strong potential to foster this market more actively to continue its growth. However, quality onshore tours, dining, and retail options must be readily available to meet the needs of the guests – particularly during the offseason to avoid poor experiences creating damage to reputation.

## Business Events and niche market tourism

The Business Event sector (meetings, incentives, conventions, and exhibitions) is a high yield market – with average daily delegate spending twice as much as traditional tourists. The uniqueness of Kimberley places it in a strong position to attract high yield, low impact domestic and international small group incentives, and pre and post-conference markets. However, the Kimberley profile and level of industry engagement is minimal and requires focus to gain traction and growth.

Opportunity exists to grow a wide range of high yield niche markets like Diving Tourism (the Rowley Shoals offers pristine, abundant coral and fish life rivalling the Great Barrier Reef), Health and Wellness tourism, Wedding tourism and Sport or Game Fishing tourism to name a few.

[10] Department Foreign Affairs and Trade - Indigenous Tourism Surge 2019
[11] Research Gate - Regional Branding: Building Brand Value
[12] Kimberley Ports Cruise Shipping

## Industry Barriers

### Air Access

A connected and cost-competitive aviation environment is essential for tourism growth.

Airfares to and from Kimberley have long been higher than other equivalent air routes in Australia and this is the primary barrier to visitation.

Despite many inquiries and reviews, there has been little or no progress in lowering air travel costs.

A more deliberative approach needs to be tried, in the effort to grow the region and provide more affordable options for travel to support industry and residents. Existing air carriers may oppose change. But there will not be better results without trying different approaches.

In the Harper Review 2015 for The Australian Government Competition Policy Review Final Report 2015, it was recommended that…" The current air cabotage restrictions should be removed for all air cargo as well as passenger services to specific geographic areas, such as island territories and on poorly served routes unless it can be demonstrated that the benefits of the restrictions to the community as a whole outweigh the costs, and the objectives of the restrictions can only be achieved by restricting competition18. "

The suggestion of removing cabotage restrictions for air services to and from Kimberley was raised in the 2017/18 WA parliamentary review into the cost of regional airfares.

Again, despite that review, no lasting improvements in airfare affordability have been seen.

### Product Density & Diversity

Research indicates that the region has a perceived lack of experience density – i.e. limited amount and diversity of tours, experiences and activities to engage visitors[13]. This, coupled with distances between town centres and the considerable time/cost in reaching the destination, present a barrier to justify a lengthy stay or return visit. There is demand for increasing mid-range accommodation options – particularly basic chalets and permanent tents[14]. Investment in the development of environmentally and culturally appropriate 5-star eco-lodges, particularly within national park setting, would cater to the growing high-yield luxury market.

### Land tenure

Access to land is a primary requirement for tourism infrastructure and associated businesses and service development. Kimberley land tenure systems are complex with multiple, overlapping tenures and numerous permits and approvals required for land development. Addressing Indigenous tenure issues, developing consistent principles to guide reviews, and improving assessment processes is crucial. Most land of tourism value is State government-owned, and therefore it is Government which can make a difference in attracting investment to develop tourism product.

### Workforce participation and productivity

Paradoxically given the unemployment rates, local labour skills shortage is an issue, and the region currently rely heavily on 457 visa and seasonal backpacker labour. A focus on engaging, training, and retaining a local workforce, especially from the Indigenous sector, would provide continuity of labour supply reducing human resource, housing, and staff development costs and increase overall productivity.

[13] See ref 11
[14] Tourism WA Research 2018

## Industry Risks

### Competing Destinations and Value for Money

There is increasing competition from alternate domestic and international destinations. These offer extremely cost-competitive holiday packages, making the Kimberley seen poor value for money. For example, for the same offseason dates, same flight distance, same carrier the return fares Perth - Bali, Indonesia $328 compared to Perth – Broome sector at $598[15]. Additionally, the average daily costs for visitors to Broome is 220% above that of equivalent visitor spend in Bali[16].

### Impact of social behaviours and low civic pride

Impact to the region's safe, friendly reputation is strongly compromised by the poor social conditions of some residents, antisocial behaviours and increasing youth-related crime. Unsocial behaviours influencing non-tourism friendly policies (e.g. takeaway alcohol bans) are a risk to the destinations reputation and industry growth. Some town centres appear tired, with public spaces and amenities off lesser standards than tourists expect. Despite considerable efforts of local shire councils, littering and unkempt areas of towns create poor perceptions amongst visitors.

### Native Title Visitor Pass

The recent introduction of individual native title groups Visitor Passes presents a risk. The potential for replication across many separate systems, excessive charges, and a lack of clarity for tourism operators and visitors could impact investment and growth.

### Market Preference

Understanding the trends in and drivers of domestic and international tourism is critical to ensure tourism-related businesses adapt products or make new investments for the region to stay relevant and on-trend to market preferences. There is a risk of complacency around innovation and development and an overreliance on the unique, untouched Kimberley brand.

### Environmental or Natural Disaster

Any large-scale natural disaster or severe outbreak of infectious disease can vastly impact tourism visitation both immediately and in the forward booking period while public confidence in the region's overall security returns.

## Report Recommendations

**Recommendation One**

Australian Government remove the current cabotage restrictions as they apply the air services to and from the Kimberley region for a three year trial period and monitor to assess the effectiveness of that in improving air services and affordability of these to the region.

**Recommendation Two**

State and local Governmental support for the continuation of direct flights from Melbourne to Kununurra along with the extension of direct international flights from Broome to Singapore to encourage increased domestic and international visitation.

**Recommendation Three**

RDA Kimberley recommends Australian Government agencies raise with and encourage the Western Australian Government to follow world best practice to better activate the region's National Parks, to promote investment, tourism products, including a range of accommodation and dining options to encourage and extend visitation.

[15] Webjet web search January 2020
[16] Budget Direct – Average Holiday Costs Statistics 2019

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