KPP
Business Development

Kadar Pearson & Partners Pty Ltd trading as
KPP Business Development

Shire of Wyndham East Kimberley

East Kimberley Tourism Plan 2022

November 2013

Contents

Acronyms and Abbreviations 3
Figures and Tables 2
Executive Summary 4
1. Background & Methodology 6
2. Key Findings 7
2.1 Secondary Research 7
2.2 Primary Research 7
2.3 Industry Consultation 9
3. Tourism Development 12
3.1 Market Segmentation 12
3.2 Tourism Development & the 6As 15
3.3 Infrastructure, Services & Products 16
3.4 Gap Analysis – Infrastructure, Products & Services 24
Target Market Segment 1: Grey Explorers 25
Target Market Segment 2: Dedicated Discovers (Sub-segment: Adventure tourism) 27
Target Market Segment 3: Business Visitors 29
Target Market Segment 4: Dedicated Discovers (Sub-segment: Eco tourism) 30
Target Market Segment 5: Aspirational Achievers (Sub-segment: Fly/Drive) 31
Target Market Segment 6: Corporate Market 32
Target Market Segment 7: Dedicated Discoverers (Sub-Segment: Cultural Tourism) 35
Target Market Segment 7: Family Connectors 37
4. Working Towards 2022 39
4.1 Strategic Objectives 39
4.2 Strategic Objectives Gap Analysis & Recommended Action Plan 40
Rationale for Recommended Actions 40
Key Strategic Objective 1: Targeting Growth Markets 41
Key Strategic Objective 2: Improving Access to the East Kimberley 42
Key Strategic Objective 3: Building the Value of Tourism 43
Key Strategic Objective 4: Developing Product and Services for Target Market Segments 44
Works Cited 47
List of Reports Reviewed 52
1. Secondary Research-Overview 52
1.1 State of Tourism 52
1.2 Visitor Numbers 53

1.3 Overview of Secondary Research 56
1.4 Review Highlights 57
Summary of Reports Reviewed 61
2 Primary Research 84
2.1 Purpose 84
2.2 Methodology 84
3.1 Consultation 93
3.2 Methodology 93
3.3 Stakeholders 93

Figures and Tables

Table 1: Regional Core Industry Multiplier 53
Table 2 - Kimberley - Core Industry Values 53
Table 3 - Regional Visitor Number Estimates (2010/11) 53
Table 4 - Kununurra Visitor Centre - Door Counts 55
Table 5 - Report by Source and Key Theme 56
Table 6 – Survey Response by Accommodation 84
Table 7 – Survey Response by Tour Taken 84
Table 8 – Survey Response by Place of Residence 85

Figure 1 - Key Report Themes 57
Figure 2: Caravan Parks by State (IBISWorld, 2013) 59
Figure 3: Revenue by Segment within Caravan Parks (IBISWorld, 2013) 59
Figure 4: Tourism Prospects on MG Conservation Lands (Tourism Naturally, 2010) 82
Figure 5- Survey Response by Age 85
Figure 6 - Household Income by Place of Residence 85
Figure 7 - Visit to the Region by Purpose of Visit 86
Figure 8 - Destinations by Purpose of Visit 86
Figure 9 - Travelling Party 87
Figure 10 - Mode of Transport to Destination 87
Figure 11 - Place of Last Overnight Stay 88
Figure 12 - Length of Stay by Purpose of Visit 88
Figure 13 - Destination Motivators by Place of Residence 89
Figure 14 - Likelihood of Visiting the KVC and by age: 89
Figure 15 - Planned Destinations within the Region 90
Figure 16: Planned Destination by Age 90
Figure 17 - Destination Satisfaction by Purpose of Visit 91

Acronyms and Abbreviations

ANL	Australia's National Landscapes
ANW	Australia's Northwest Tourism
BVC	Broome Visitor Centre
DPAW	Department of Parks & Wildlife
KCCI	Kununurra Chamber of Commerce
KPP	Kadar Pearson & Partners Pty Ltd trading as KPP Business Development
KSCS	Kimberley Science & Conservation Strategy
KVIC	Kununurra Visitor Information Centre
MG	Miriuwung Gajerrong
MRD	Main Roads WA
SWEK	Shire of Wyndham East Kimberley
TA	Tourism Australia
TTE	Tourism Top End
TWA	Tourism Western Australia

This Report should be read in conjunction with Part B: East Kimberley Operational Marketing Plan, 2013.

Kadar Pearson & Partners Pty Ltd, trading as KPP Business Development

PO Box 2443, Broome Western Australia 6725

Executive Summary

The Shire of Wyndham East Kimberley (SWEK) has identified the significance of the tourism industry to the East Kimberley economy and has determined that this Tourism Plan will set quantifiable goals with measurable results to take a broader, longer term view of the East Kimberley's strategic roles in tourism. This approach differs from previous years where, East Kimberley tourism has been largely guided by marketing activities and related services through Tourism WA (TWA), Australia's North West Tourism (ANW) and individual operators.

The East Kimberley Tourism Plan guides the sustainable regional growth of tourism to 2022. The Plan builds on existing strategies and is designed to assist SWEK in policy development, planning and financial decision making. Where appropriate, the Tourism Plan aligns with broader regional tourism strategies.

A concept that is fundamental to this Plan is that tourism "destination" development involves creating positive experiences for visitors based on attractions, activities, events and services, and includes management of the destination's assets in addition to marketing activities.

The development of this Plan included secondary research, primary research of visitors and consultation with industry and regional stakeholders which led to the development of the strategic goal:

To increase the value of tourism to the East Kimberley from $100.5m in 2013 to $130m by 2022

The East Kimberley has considerable natural tourism assets and iconic experiences but significant effort is still required in product development, improving the marketing capacity of the local tourism industry and improving access to the region for visitors. The East Kimberley Tourism Plan focusses on addressing these fundamental aspects of tourism as a means of stimulating tourism growth in the region.

On this basis, there are four (4) strategic objectives identified to achieve the goal:

1. Targeting growth markets (Target segments, including Business);
2. Improving access (Making it easier to get to the region);
3. Building the value of tourism (both visitor and resident perspectives); and
4. Developing products, services and events to meet the needs and expectations of target market segments.

The market segments of importance to this plan, identified through research and industry consultation phases, are considered to be the "Grey Explorers", the "Dedicated Discoverers" (as defined by TWA), and the business traveller market segments.

The Grey Explorers have represented the cornerstone of annual tourism visitation for the East Kimberley in past years. Most current East Kimberley tourism strategies are focussed on this market segment. They remain vitally important to the tourism industry in the region and represent a market that will be 'maintained and monitored' going forward.

Dedicated Discoverers, and particularly the sub-segments of this group (fly/drive market, eco-tourists, and east coast visitors) are identified in this plan as a target market for growth. This cohort represents a higher-yielding visitor through which the industry is seeking to increase the contribution and value of tourism to the East Kimberley economy.

The region attracts around 115,000 visitors per annum, of which around 45% are caravan and campers, and 36% are business and fly/drive visitors. Access issues addressed in this plan include overcoming current limitations to air transport/connecting flights; improving road conditions and impacts of seasonality on access to attractions; and overcoming the lack of transport options around Kununurra for visitors.

Tourism is the second largest contributor to the economy of the East Kimberley. Currently there is a low level of understanding by residents of the value of tourism to the local economy. The importance of valuing visitation to the region needs to be reflected through improving the 'service culture' of the town.

The need to look at improving and developing tourism product and services to meet the needs of all target markets is addressed in this Plan. Current products and services meet the needs of the caravan and camper market to a large extent, but other target markets are not yet adequately supported. Some of the key requirements into the future include improving the range of accommodation and products, developing indigenous tourism product, creating new events across shoulder seasons, improving the look and feel of the townscape, and better services for business visitors.

There are 21 strategic actions recommended in this plan that address improvements to the 'fundamentals' of tourism in the East Kimberley. Of importance to the implementation of this Tourism Plan, each one of these strategic actions is within the influence and control of the industry and stakeholders in the East Kimberley. This plan will assist the East Kimberley to become "market ready" for broader strategic and "flagship" tourism infrastructure projects to be driven by State Government initiatives.

The strategic objectives of the East Kimberley Tourism Plan direct the overall focus of the Operational Marketing Program developed to accompany this Plan. Strategic and tactical marketing initiatives focus on maintaining existing key markets (drive market, CCC) in addition to targeting higher-yielding markets (Dedicated Discoverers).

The following strategic marketing priorities were identified to further support the implementation of the East Kimberley Tourism Plan:

1. The development of a local marketing levy for the East Kimberley;
2. The establishment of a local representative body for tourism in the East Kimberley (informal) to provide guidance in terms of creative elements, key messages, values and marketing content;
3. Identification of the most suitable and appropriate means by which the marketing program can be implemented;
4. Improving access to the region by air e.g. connecting services from east coast locations, increased frequency etc; and
5. Educating the local community and small business sector on the 'value of tourism' to ensure that product and service delivery backs up the marketing program.

The East Kimberley Tourism Plan 2022 provides the foundations upon which the Shire of Wyndham East Kimberley can engage with, support and benefit from tourism in the Shire.

1. Background & Methodology

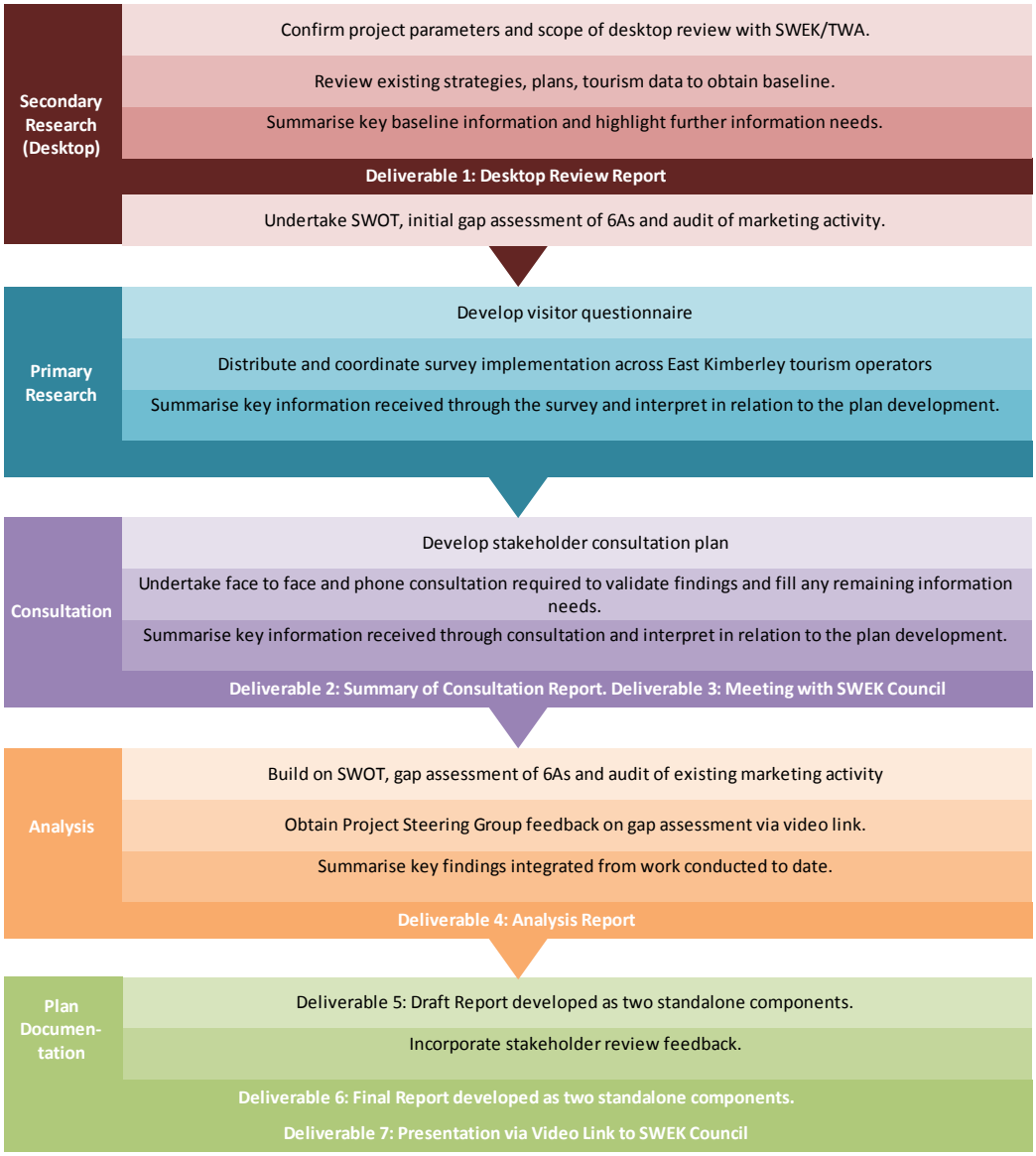
A Tourism Plan for the Shire of Wyndham East Kimberley (SWEK) is required to guide the sustainable regional growth of tourism to 2020. The plan intends to build on existing strategies and assist SWEK in policy development, planning and financial decision making.

Key outputs of the Tourism Plan include quantifying the value of tourism in the East Kimberley; developing tourism infrastructure and product development priorities; devising marketing and promotional activities and how these opportunities can be leveraged to improve outcomes from both events and business investments.

The Tourism Plan needs to align with broader regional tourism strategies, where appropriate.

The agreed methodology for the development of the plan was based on five (5) phases:

1. Review of existing plans and strategies (secondary research);
2. Survey of visitors (primary research);
3. Consultation with key stakeholders;
4. Analysis; and
5. Plan Documentation.



2. Key Findings

2.1 Secondary Research

- There is a large body of work that has been undertaken in determining future priorities for tourism in the Kimberley.
- There is generally consistency in themes between the Commonwealth, State and industry bodies in plans for the East Kimberley. These themes are based on natural attractions; self-drive experiences (camping, caravanning and nature based accommodation); and development of Indigenous product, participation and facilities.
- There is a level of conflict between the destination priorities and trends. The destination is all about spectacular landscapes which are generally accessible by vehicles and yet the drive market is stagnant. The growth segment of the drive market is Grey Nomads who have the lowest average spend per night of any market segment within this industry.
- Around one-quarter of Grey Nomads and Explorers who travel through the Northern Territory's Top End also visit Kununurra. There appears to be opportunities to increase this proportion through targeted marketing and promotional offers.
- There is a growth trend in the fly/drive market, i.e. visitors who fly to a destination and then hire or borrow a vehicle. This trend is compatible with the changing patterns of holiday behaviour, where people are taking shorter, more frequent breaks. This growth trend does not appear to have been considered in its impact on Kununurra and the SWEK region in (external) strategies developed.
- There appears to be strong compatibility between the strategies and plans being adopted by Tourism Top End and the SWEK region.
- Data upon which decisions are made is generally out of date. Specifically, many of the reports are dated around 2009 at which stage the impacts of the GFC on regional tourism were not quantified.
- ABS no longer report of small region tourism satellite account data and therefore the need to develop other data sources is becoming increasingly important.
- Tourism Development Priorities (2010-2015) suggests that Kununurra and all Kimberley regions outside Broome are in the "development phase" of the tourism lifecycle model however, it is unclear which organisation has responsibility for product development.
- The consultation phase of this project will focus on developing mechanisms to improve source data information and timeliness of that information so it can be used for long term and tactical planning; the level of support for strategies developed by external agencies; and consideration of new opportunities (such as closer collaboration with Tourism Top End and product development not currently considered within external strategies).

2.2 Primary Research

The business visitor represents around 15% of the total visitor market based on survey results however, as the survey was conducted over the peak of the leisure visitor season, it is considered that on an annualised basis, the business visitor represents closer to 20% - 22% of visitors to the East Kimberley.

There are significant differences between the leisure and business markets in terms of accommodation choice, average length of stay, mode of transport to reach the destination, average yield, activities sought and services required. Whereas the business sector's dissatisfactions focus on the lack of connecting flights; transport services between the airport and town; lack of a variety of restaurants; and poor service, the leisure sector focuses on road

conditions; amenities; the ambience of the town; and the high cost of essentials.

The results of this survey have provided a number of indicators for future consideration and planning. Specifically, there are issues raised that are in the direct control of the Shire, Chamber of Commerce, Infrastructure and Development agencies, the Visitor Centre and marketing bodies:

SWEK – There is a general sense that Kununurra looks tired and old and requires a "facelift". There is also a need to better accommodate caravans and campers with dedicated parking bays within the town centre and shopping centre.

The Chamber – The value of tourism to the region needs to be better communicated to the business and general community so that the region is seen to be visitor friendly. It is assumed that the poor service referred to by survey respondents is systematic of residents' frustration with the large inflow of visitors during the dry season and therefore locals need to better understand the contribution of these visitors to the local economy. There are also a number of business opportunities that have been identified by respondents that may be valuable to Chamber members.

Infrastructure and Development Agencies – Although many respondents suggested that the Gibb River Road needs to be improved/sealed, this is not compatible with the market positioning of this road. However, there are a significant number of respondents who commented on the safety of the Lake Argyle access road in that it is seen to be too narrow to cater for caravans. Although it is unlikely that this will be considered a priority for SWEK due to funding constraints, some signage about the road conditions may overcome the concerns raised. The same applies to single lane bridges along the Northern Highway. Similarly, consideration should be given to making improvements to the Kalumburu Road and potential investment in 4WD Trails over the longer term.

Kununurra Visitor Information Centre – Around 10% of respondents were dissatisfied with the service or information received at the Visitor Centre. As with all VC's in the Kimberley, casual staff are recruited during the peak season to meet visitor demand and training (and therefore local knowledge) can be limited.

Accommodation providers –The needs of business travellers is substantially different to the needs of the leisure visitor, as is recognised by accommodation providers. However, survey respondents have provided further insights, specifically as they relate to transport services between the Airport and town and an improved variety of places to eat and after work activities.

Marketing Bodies – Survey results have shown clear differences in the motivations to visit the region between intrastate and the east coast market. Whereas people from Perth are far more interested in the weather, East Coast visitors are looking for Aboriginal experiences and visiting cultural and historic sites. Common to both markets is the draw of the landscape. The basic demographics of survey respondents should also be useful in developing targeted marketing activities.

The information gained from this survey is an important first step in developing a long term plan for tourism but should be seen as a benchmark for future studies. It is strongly recommended that consideration be given to running this survey again during the shoulder period (October/November) and again in July 2014.

Detailed findings of the Visitor Survey are attached as Appendix II to this document. However, key findings can be summarised as follows:

- Two thirds (67%) of the sample were visiting the East Kimberley for the first time with the significant majority (85%) stating they were on holidays rather than business.

- 85% of survey respondents claimed they were in the region for holidays compared with 15% who state they are in the region for business.

- Over 70% of respondents who are in the East Kimberley for holidays, state this is their first time in the region compared with 42% who are travelling for business.

- Almost 90% of respondents who are in the region for holidays state that the East Kimberley is part of an extended trip to a number of destinations compared with only 38% of those travelling for business.

- Almost 50% of business visitors state they are travelling in the region with colleagues while over 80% of holiday visitors are travelling with family or friends.

- The significant majority (83%) of business travellers to the region arrived by plane compared with 16% of those travelling for holidays.

- The majority of holiday visitors (56%) came to the region from the Northern Territory compared with 37% who came from the Central or West Kimberley.

- 3-5 day stays appears to be the most prevalent length of stay for both business and leisure travellers.

- Around one-third (34%) of visitors from NSW booked tours in advance of arriving to the region compared with 19.64% of visitors who live in WA.

- Leisure visitors from WA are more likely to go to the East Kimberley because of the good weather whereas visitors from the Eastern States claim Aboriginal experiences, cultural and historic sites and landscape to be key motivators.

- Almost 70% of leisure visitors planned to visit the Kununurra Visitor Centre however this is strongly skewed to people 55+.

- Lake Argyle/Ord River and Purnululu dominate the list of attractions visitors plan on seeing during their stay in the region.

- There is a high level of satisfaction in terms of respondents' visit to the region however leisure visitors have higher satisfaction levels than business travellers.

- Leisure visitors believe improvements can be made in terms of road conditions, mobile and internet coverage, costs, the Visitor Centre, the look of the Town and general facilities and amenities.

- Business visitors believe that there needs to be better connecting flights; improved transport between the airport and town; improved facilities and activities particularly in relation to restaurants and after work hour's events.

- Around 10% of both leisure and business visitors believe that Kununurra is not visitor friendly.

2.3 Industry Consultation

The consultation phase revealed a broad range of views regarding the future development of tourism in the East Kimberley. Matters raised included industry development, destination development and marketing from both a micro and macro perspective. Given the volume and in some cases disparity of views and feedback shared by stakeholders, key findings have been summarised below against the 6A's.

Access

- Stakeholders widely acknowledged that air access to the East Kimberley needs to improve – both connections through Darwin and exploring new routes. This applies to both the leisure and corporate market.

- Comments were put forward on the need to make improvements to the Kalumburu Road. There are constraints in terms of SWEK's ability to fund annual maintenance. There is a view amongst industry stakeholders that divesting SWEK of the Kalumburu Road may help facilitate improvements. Based on discussions with SWEK it would appear they would support this direction.

- Over the longer term investment in 4WD Trails should be considered to encourage visitor dispersal across the region.

Accommodation

- Caravan Park overflow facilities need to be better coordinated. Ord Expansion Project (OEP) Worker's Camp needs to be considered for this use.

- SWEK should not be 'in the business' of operating overflows (e.g. Agricultural Oval) but should facilitate this seasonal need through the industry.

- 24-hr Rest Stops implemented and managed by Main Roads WA (MRD) are not conducive to supporting local Caravan Park operators or the retail business sector. It just gives visitors a reason not to come into town.

Attractions

- Ngamoowalem Conservation Reserve is considered another new area in which walk trail / trekking / hiking products can be developed. It is considered to be the 'low hanging fruit' in terms of the MG Dawangs (reserve lands).
- More events need to be developed to lengthen the season. Focus should obviously be placed on shoulder periods and events should be developed around themes such as Landscape, Water, Wildlife / Nature, People / Culture / Lifestyle.
- A key impediment to the development of future events is determining / identifying who will drive progress in this area. i.e. Events development is often left to too few which in turn limits capacity.

Activities

- A number of stakeholders support the proposal to excise the Cockburn Ranges from the pastoral lease to create iconic walk trails in this area.
- The creation of iconic walk trails is supported conceptually by the industry however there is a view that the target markets for this type of product need to be clarified.
- More Indigenous tourism product would add value to the visitor experience and the appeal of the region. With this in mind, product development strategies are needed for each of the key Traditional Owner Groups (Balangarra, Wunambal Gaambera, Mirriuwung Gajerrong, Dambimangari) to identify opportunities and how they can enhance the visitor experience, particularly along the Kimberley Coast.
- Networks and support for people seeking to enter the tourism industry needs to be improved. It is unclear who is responsible for this or how it functions. A number of stakeholders cited the lack of new product in recent times as a result of this.
- Indigenous stakeholders in the North Kimberley (e.g. Wunambal Gaambera) have a clear vision of where and how they see the future of tourism development on their lands.

Amenities

- There is general agreement amongst stakeholders that Kununurra looks tired and 'needs revitalising'. It is not entirely visitor friendly.
- The majority of stakeholders concurred that the facilities and amenities for the drive market needed to be improved in the town centre.

Awareness

- There is general agreement that service levels in the East Kimberley need to improve.
- The 'value of tourism' is not acknowledged or fully appreciated by the business community, resident community and the local Council.
- There is strong support within industry operators for the notion of a 'tourism portfolio' being established within SWEK / Council.
- The majority of stakeholders believe that SWEK does not support tourism enough – this applies to marketing, policy & planning, infrastructure and advocacy.
- Many stakeholders believe KCCI can play a greater role in advocating the industry for benefit of all businesses.
- There is a lack of industry leadership and advocacy at a local level.
- The SWEK region has many things in common with the Northern Territory (NT) however, it is acknowledged that NT is unlikely to want to collaborate and 'send visitors across the border'. Despite this, it is generally agreed that strategies should be developed to encourage visitors to Darwin and NT to travel further afield to East Kimberley.
- The China market is not considered a realistic option for the East Kimberley, apart from

possibly some small 'business groups' associated with Ord Stage 2. The majority of stakeholders consulted agreed that the experience in the Kimberley was a long way from what the Chinese market is looking for and the region is simply not ready for this market.

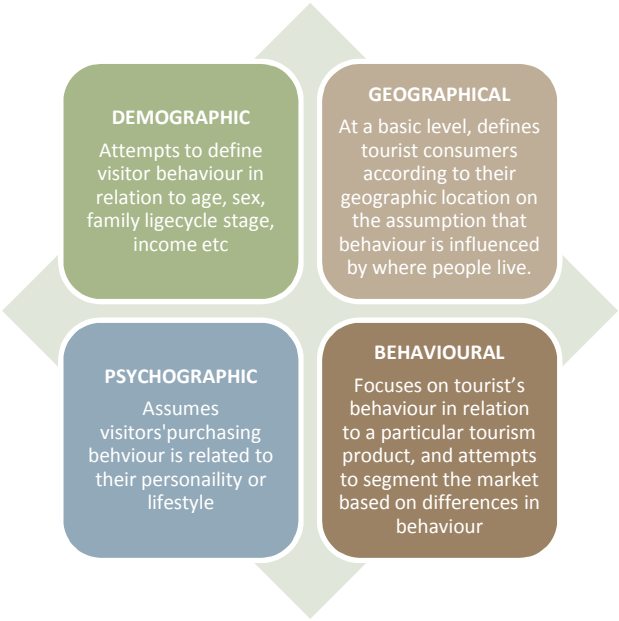
- The 'incentive market' (i.e. corporate retreats or rewards) represents some opportunity from a 'business tourism perspective' but for small groups only.
- There is a perception that the marketing activity undertaken by ANW (the Regional Tourism Marketing Organisation) is mainly focused on Broome.
- There is general consensus that more focus needs to be placed on marketing the East Kimberley. However, it is equally recognised by stakeholders that this requires a greater level of marketing monies and capacity to be raised within the Shire.
- There was a common view amongst industry operators and stakeholders that an East Kimberley tourism marketing fund needs to be established.
- There is support within the industry to consider and explore concepts such as Differential Rating, an Airport levy, a "bed tax" / passenger tax etc as a means of raising a local tourism marketing fund.
- Should a marketing fund be established it is unclear as to who would be responsible for coordinating / implementing such a program.
- There are mixed views on who would be responsible for developing and implementing marketing activity funded through a local program. e.g. KVC, ANW, Local Committee, or KCCI. It is generally acknowledged that setting up a new entity will would require administration and operational costs to be met and potentially reduce funds for marketing.
- There are some strong views that the marketing message needs to focus on Kununurra.
- A number of others maintain that the marketing message / positioning should lead with icons, landscape etc as most of the 'attractions' are outside the town. They believe this is what draws visitors to the area – not the town.
- There are some strong views that the East Kimberley should leverage from key icons in the region as a means of creating greater consumer awareness. E.g. Bungle Bungle, Lake Argyle, Gibb River Road, Kimberley Coast, Ord River, Mitchell Plateau etc.
- The majority of stakeholders agreed that Kununurra is not a destination, however some expressed strong opinions that it needs to be like Broome.
- Some stakeholders suggested that the East Kimberley should have its own brand (like Broome) whereas others suggest the region should continue to leverage off the Kimberley brand and TWA's Experience Extraordinary brand.
- It was agreed that visitors from the East Coast of Australia represent a higher-yielding market.
- The tourism Industry still places a lot of importance on the drive market – they firmly believe that the Grey Nomads are still critical to their operations.
- Generally the industry in the East Kimberley is seeking to explore packaging of product more in partnership with airlines, improved air access etc.
- There is a lack of reliable and up to date visitor data upon which informed decisions can be made.

3. Tourism Development

3.1 Market Segmentation

In order to determine tourism development priorities for the future, clarity around key target markets is required in the first instance, as development priorities need to be considered in terms of the expectations of varying target market segments.

Tourism markets can be segmented in a variety of ways. Each of the four basic techniques – geographic, demographic, psychographic and behaviouristic have a number of advantages and disadvantages. i.e.



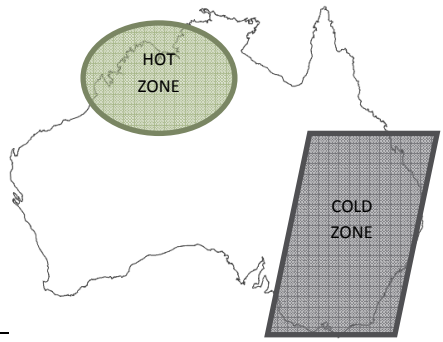
The use of geographic and demographic segmentation methods as a basis for differentiating marketing strategies has traditionally been advocated by regional or demographic variations in tourist behaviour. These methods are a useful starting point for those tourism organisations constrained by limited resources to gain a better understanding of their market.

However, these techniques have drawbacks as they lead to significant stereotyping that usually covers up or masks important variations in tourist behaviour. Not only do these techniques ignore other key influences on behaviour, they do not consider the wide variation in tourists' needs and wants even in small geographic areas or demographic groupings.

Psychometric Models [1]

TWA market segmentations are based on a psychometric segmentation model that consists of three main elements.

1. Aspirations (value statements that identify segments on the basis of perceptions and judgements of quality).
2. Life factors and choice drivers (such as income and stage in the family lifecycle).
3. Tourism purchase scenarios (e.g. accommodation and attraction preferences, purpose of trip, satisfaction with choices previously made, and other purchase drivers



[1] **Psycho** and interpretation of quantitative tests for the measurement of psychological factors for individual or group behaviour.

and determinants).

However, in terms of more accurately targeting market segments, a number of additional variables should be considered:

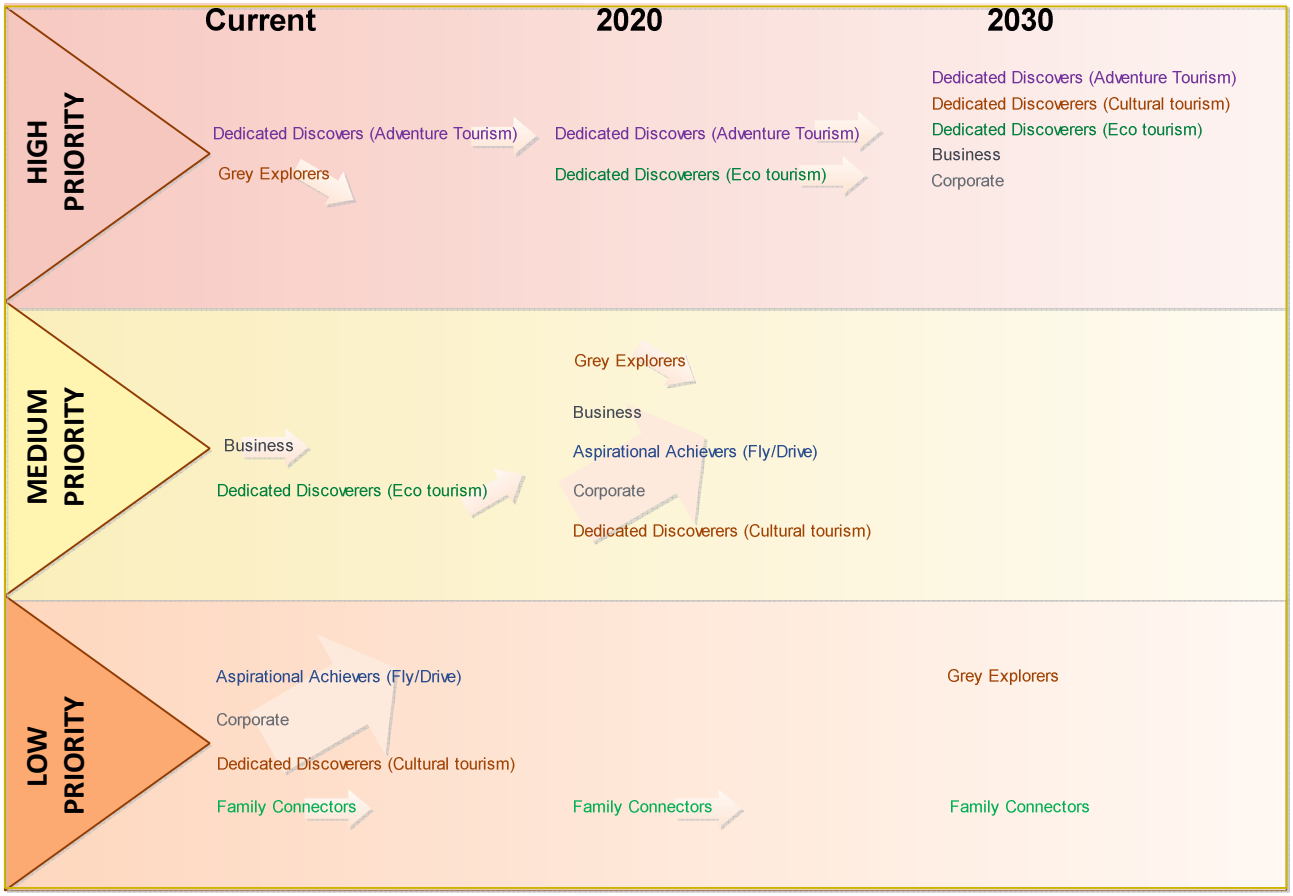
- Is there a relationship between geographic location of visitors and yield/spend?
- Is there a relationship between place of residence and proximity to destination? e.g.
- Where do emerging market segments (e.g. fly/drive) fit within traditional segmentation models? How are they recognised?

Psychometric Segment	Sub-segment	Yield	Geographic	Priority
Aspirational Achievers (AA)	Fly/Drive	High		Currently not a key target as they are time poor and enjoy holidays around resorts, wine, food etc
Dedicated Discoverers (DD)	Adventure Tourism Eco Tourism Cultural Tourism	High High High	Regional, intrastate, interstate, international Intrastate, interstate, international Interstate, international	High – attractions, activities & amenities largely in place High – attractions, activities & amenities largely in place Low - Product scarce and inadequate
Grey Explorers (GE)		Low	Intrastate, interstate	Medium - but will remain cornerstone of visitors over the next decade. High impact, low yield.
Family Connectors (FC)		Low	By default, this segment will be within a reasonable proximity to the EK with the trend to short, more frequent breaks. Most likely inter-region, intrastate and western NT.	Medium – distances are a key barrier.

In addition to the leisure market segments, two additional segment need to be considered:

Segment	Yield	Key Issues
Business	Medium - High	Represents 20% - 24% of visitor market and potentially high yield but don't have places to spend their money
Corporate	High	Low priority currently as dedicated facilities don't exist

On the premise that this plan focuses on the medium term strategies required to firstly consolidate and secondly to build tourism in the East Kimberley, the following table identifies target segment priorities in the short, medium and long-term based on capacity to deliver, time required to build new infrastructure and industry trends:



Grey Explorers – This segment represents the cornerstone of leisure visitors to the East Kimberley and will remain so for some time. This segment (probably) has the highest trip cost but the lowest spend per night of all target segments. With changing holiday behaviour, cheap airlines / airfare and increasing petrol costs, this segment is seen to be declining over time. This segment is well catered in terms of paid and free accommodation, attractions and activities although some amenities could be improved. It is noted that the State Government will be investing $34+ million over the next 4 years in WA's Caravan & Camping segment which will contribute to this cohort remaining a key source of annual visitation.

Dedicated Discoverers (Adventure Tourism) – The natural attractions, tourism attributes / experiences and remoteness of the region will continue to attract this segment over time. This segment may fly to Kununurra and then hire a vehicle or self-drive. The segment is generally well catered for and is a priority segment in 2013 and into the future.

Business – This segment is largely dependent upon economic activity, construction, new projects, expansion of current projects, service delivery and so on. It is estimated to account for 20% - 24% of the visitor market. There are significant opportunities to increase yield from this segment by developing and providing business specific products and services. (e.g. Business Club; high quality restaurant; flagship property on the banks of the Ord; airport transfer services; business services / facilities etc)

Dedicated Discoverers (Eco Tourism) – A number of properties currently meet the aspirations of this segment such as Faraway Bay; Berkeley River Lodge; El Questro / Emma Gorge however, it is largely reliant on property owners to promote and market these properties. There is a global trend to eco-tourism and increased property options and

more cohesive marketing is seen as providing growth opportunities.

Aspirational Achievers (Fly/Drive) – A low priority currently, this segment is time poor and take shorter, more frequent breaks. They seek aspirational destinations and look for indulgences (in accommodation, food, wine etc). Currently, there are few properties / resorts that meet their needs with the exception of the Berkeley River Resort and the Homestead at El Questro. Coupled with the lack of accommodation options, access is difficult with few direct flights and poor connecting services from Darwin or Broome. This is a growth segment and improved access and targeted marketing are seen as priorities for the medium to long term.

Corporate – There are currently limited, suitable, purpose built venues for the corporate / conference market with the exception of the Berkeley River Resort and Kimberley Grande. However, this segment is seen to expand with the building of purpose built facilities at Lake Argyle and the Country Club.

Dedicated Discovers (Cultural Tourism) – There is very little cultural tourism product available in the East Kimberley. The development of MG lands, the determination of the Balangarra Claim and the investment aspirations of Gelganyem are seen as medium term opportunities for product development. Furthermore, the development of cultural tourism products in association with the Kimberley Cruising market is a priority for Wunambal Gaambera people.

Family Connectors – Although this is a forecast growth segment in WA, this segment is seen as a low priority for the East Kimberley mainly due to proximity. (Length of time required to reach destination coupled with length of holiday periods).

3.2 Tourism Development & the 6As

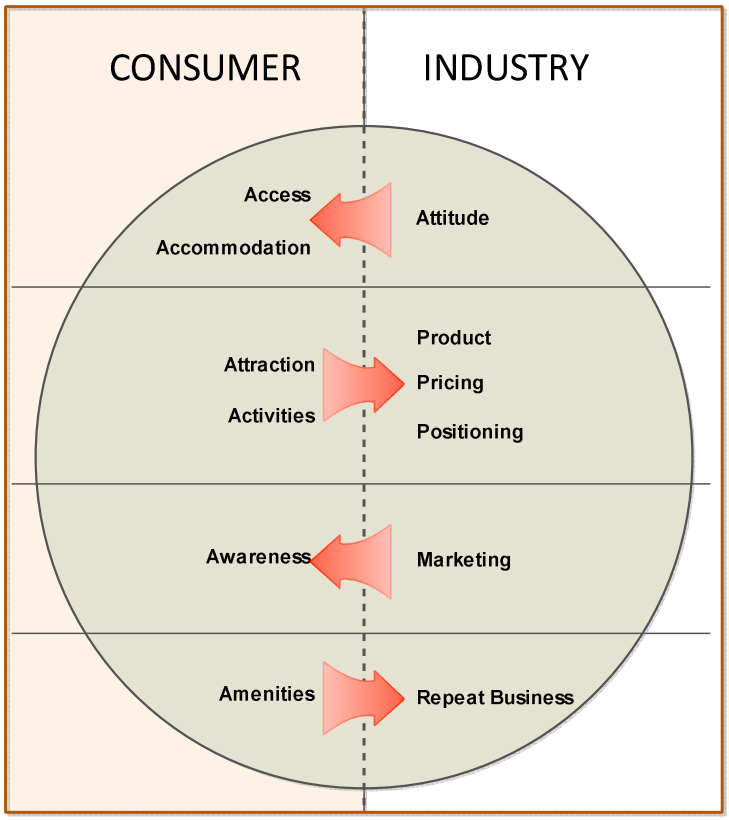
The 6As of tourism as defined by TWA are consumer focused criteria against which destinations can be evaluated and gaps identified. However, input from the industry to deliver the 6As is equally important and needs to be recognised in identifying infrastructure, service and product development gaps and priorities.

The 6As can be consolidated into four (4) categories:

1. Fundamentals – i.e. The basics required to develop and/or build tourism. This includes Access and Accommodation as visitors need a way to get to the destination and somewhere to stay when they get there. Equally important from an industry and community perspective, is the commitment to a tourism sector. If locals don't want leisure visitors, service and pricing will reflect this attitude and dampen efforts to build the sector.
2. Reasons Why – i.e. Visitors need a reason to consider a destination and things to do once they get there. This competitive advantage or Attractions, Activities and Events needs to be compatible with industry drivers of product, pricing and positioning, as it is incumbent on the industry operators to develop product around these attractions; provide the activities; and position these drivers at a price that is reasonable in a competitive environment.
3. Communication/Letting People Know – i.e. Awareness of the destination, access, accommodation, attractions and activities are driven by the industry through marketing, PR, events and promotions.
4. Experience – i.e. The ultimate experience is based on accommodation, attractions, activities meeting expectations however, amenities (to a large extent) drive repeat business and new business through word of mouth, social media, travel sites such as Trip Advisor.

As the 6As are not entirely visitor driven, emphasis on industry and community drivers need to be considered when developing tourism development priorities and gap analysis.

The following diagram attempts to show the



interrelationships between the 6As and industry driven aspects of tourism development.

3.3 Infrastructure, Services & Products

Kununurra is the base for a lot of tourism activity within the East Kimberley, in part due to the services available in this town that also support the Ord River based agricultural enterprises. Kununurra is the location of the main airport for the region, has hire car companies, shopping, banking and other necessary amenities and a range of accommodation options. There are numerous tourism attractions in the region including Australia's largest inland waterbody, Lake Argyle, lookouts, adventure trails (including the Gibb River Road and Parry Creek 4WD Track) and a range of tours, galleries, dining and recreational activities. Kununurra is the Kimberley's busiest scenic flight base, with flights to Purnululu, Mitchell Falls and the Kimberley Coast.

Wyndham is approximately 100 kilometres north of Kununurra along the Great Northern Highway and is the oldest town in the East Kimberley, first settled in the late 1800's. Although very different from Kununurra in its appeal to tourists, its history as a major hive of activity during the European settlement of the East Kimberley, the Five Rivers Lookout on the Bastion range, Afghan Cemetery, prison tree, the large crocodile statue on the entrance to the town, and the remote and desolate nature of the area makes it an interesting destination to visit.

The public tourism infrastructure in the region includes information bays, signage, picnic areas and ablution blocks, principally maintained by the Shire of Wyndham East Kimberley.

As part of the Kimberley Science and Conservation Strategy Tourism Initiatives study undertaken in 2012, a detailed listing of current infrastructure was undertaken. This information has been used

to map existing tourism related infrastructure, services and products.

Tourism infrastructure, products and services have been mapped against six (6) A's of tourism: Access, Accommodation, Attractions, Activities, Amenities and Awareness. For consistency of review (in terms of tourism development) awareness in this instance is based on market awareness.

In the first instance, the existing and proposed tourism related infrastructure has been mapped in the tables following:

East Kimberley – Existing Infrastructure, Services & Products

Location	Access	Accommodation	Attractions	Activities	Amenities	Proposed Infrastructure	Awareness	Source of Plan
Drysdale River Station	4WD - Kalumburu Road Airstrip	Homestead Campsite	Working station, scenic flights over MP, pastoral history	Bar, bush restaurant	Hot / Cold Showers, flushing toilets, laundry, fuel, general store,		Low unless specific research has been undertaken as part of a planned trip to the region	Western Australian Caravan and Camping Action Plan 2013-2018
Miners Pool Campsite	4WD	Paid camping (Managed by Drysdale River Station)		Bush walking	Pit Toilets		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Munurru Camp Ground	4WD	Paid camping	Rock art, bush landscape	Bush walking	Basic ablutions		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Punamii-unpuu (Mitchell Falls) camping area	4WD Port Warrender Rd	Dedicated Camping area (Managed by DPAW)	Mitchell Falls	Walk trails to Falls; swimming holes; helicopter tours	Shade, toilets, drinking water, dedicated firewood collection area		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
APT Mitchell Falls / Wilderness Lodge	4WD Port Warrender Rd	24 Safari Tents	Mitchell Falls	Walk trails to Falls; swimming holes; helicopter tours	Restaurant		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Outback Spirit / Ngauwudu Safari Camp	4WD Port Warrender Rd	14 Safari Suites	Mitchell Falls	Walk trails to Falls; swimming holes; helicopter tours	Restaurant		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012

Location	Access	Accommodation	Attractions	Activities	Amenities	Proposed Infrastructure	Awareness	Source of Plan
Mitchell Plateau	Airstrip 4WD Port Warrender Rd		Mitchell Falls, unique vegetation (livistonia palms), scenic drive	Walk trails to Falls; swimming holes; helicopter tours	Hybrid toilets (at falls), ablutions at airstrip, No rubbish disposal at Mitchell Falls.	Upgrade to airstrip – subject to RADS funding	Low unless specific research has been undertaken as part of a planned trip to the region	Western Australian Caravan and Camping Action Plan 2013-2018
Kalumburu	4WD - Kalumburu Road Airstrip	Paid camping (Mission, Honeymoon, Mc Gowan), dongas, guesthouse (KAC), free camping at nearby coastal locations	River; Mission (museum), Old Mission relics; art centre, bush landscape, Teacher's Pool	Fishing, artists at work	General Store, fuel, fresh water, pay phones, waste disposal facilities		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Longini Landing	Track from Kalumburu	Free camping area		Riverbank Access, fishing			Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Pago	Track from Kalumburu	Free camping area	Pago Mission ruins	Fishing, rock art sites			Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Honeymoon Bay	Track from Kalumburu	Paid camping		Beach access, fishing	Toilets, showers, waste disposal		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Mc Gowan Island	Track from Kalumburu	Paid camping		Beach access, fishing	Toilets, showers, waste disposal, fuel		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012

Location	Access	Accommodation	Attractions	Activities	Amenities	Proposed Infrastructure	Awareness	Source of Plan
Carson River Station	4WD Carson River Track	Free camping	Carson River	River Access	Water	New Designated Campground	Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Carson River Station - Bulldust Yards Camping	4WD Carson River Track, Airstrip	Camping Area	Drysdale River	River access, rock art, gorges, canoeing, bush walking, bird watching			Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Home Valley Station	4WD Gibb River Road	Cabins, eco tents, campground	Lookout area over ranges is spectacular. Taste of Station life, general landscape.	Children's Playground, tours	Bar / Grill, showers, water, toilets		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Pentecost River Crossing	4WD Gibb River Road	3 to 4 Free roadside camp sites	River Crossing	Fishing			Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
El Questro /Emma Gorge	4WD Gibb River Road	Cabins, camping	Natural landscape and organised tours, Emma Gorge	Bush walking, swimming in Emma Gorge	Hot/ Cold Showers, toilets, store, laundry, swimming pool, restaurant		Medium	KSCS – Investigation of Tourism Initiatives 2012
El Questro Station Township	4WD Gibb River Road	Camping, cabins, homestead	Natural landscape and organised tours	Fishing, bush walking	Store, restaurant, laundry, ablutions		Medium	KSCS – Investigation of Tourism Initiatives 2012
Dunham River Reststop/Wyndham	Via Great North Nighway	24 hr camping	History, lookout, swimming hole but only during / after wet season.		Bins, Hybrid toilets, picnic shaded tables, upright bbq's.		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012

Location	Access	Accommodation	Attractions	Activities	Amenities	Proposed Infrastructure	Awareness	Source of Plan
Wyndham	Victoria Highway – sealed Road	Caravan and Camping	5 Rivers Lookout, history, Afghan and Pioneer Cemeteries; Aboriginal Dreamtime Statues	Heritage Trail, walking trails; Wyndham Museum; fishing	Hotel, cafes, tourist information, fuel, stores	Wharf Upgrade	Some level of awareness due to historic significance however, low awareness of attractions, activities & amenities unless specific research has been undertaken as part of a planned trip to the region	Tourism Development Priorities 2010-2015
Cockburn rest stop	Sealed (Victoria Highway & Northern Highway)	24 hr camping			Bins, toilets	$110K investment by State in bbq's, cement tables and earthworks	Low unless specific research has been undertaken as part of a planned trip to the region	Western Australian Caravan and Camping Action Plan 2013-2018
MG Conservation Lands	Bush tracks					Investor ready developments	Low unless specific research has been undertaken as part of a planned trip to the region	Tourism Development Priorities 2010-2015
	Bush tracks					Ngamoowalem Conservation Park		Naturebank
	Bush tracks					Darram Wetlands and Cultural Centre		The Miriuwung Gajerrong Conservation Lands
	Bush tracks					Jimilyiwoorr Safari Lodge		The Miriuwung Gajerrong Conservation Lands
	Bush tracks					Skeleton Creek-high yield safari tents or cabins		The Miriuwung Gajerrong Conservation Lands
	Bush tracks					Turtle Beach-environmental safari lodge		The Miriuwung Gajerrong Conservation Lands

	Bush tracks					Yirralalem-tented safari cabins		The Miriuwung Gajerrong Conservation Lands
Molly Springs **Valentine Springs** **Middle Springs** **Black Rock Falls**	Highway then Bush track Unsealed road Unsealed road Unsealed road	Nil Nil Nil Nil	Freshwater spring Swimming holes during the Wet Swimming hole during the Wet Waterfall / swimming hole during the Wet	Swimming Swimming Swimming Swimming		Toilets Toilets Toilets	Low unless specific research has been undertaken as part of a planned trip to the region	Departmental advice
Berkley River Resort	Floatplane, helicopter or boat	Resort-style accommodation, 20 units	Berkley River Gorge, Rock Art, Landscape, Kimberley Coast	Bush walking, fishing, gorge swimming, bird-watching, gorge cruises, sightseeing	Full Resort facilities, swimming pool, restaurant, conference centre	Land-based airstrip under construction	Low unless specific research has been undertaken as part of a planned trip to the region	Operator consultation
Faraway Bay	Floatplane, helicopter or boat	8 x cabins	Kimberley coast, Rock Art, Landscape	Bush walking, fishing, bird-watching, sightseeing	Hot/ Cold Showers, toilets, , laundry, swimming pool, dining area		Low – medium, unless specific research has been undertaken as part of a planned trip to the region	Desk research
Kimberley Coastal Camp	Floatplane, helicopter or boat	Gazebo-style accommodation	Kimberley coast, Rock Art, Landscape	Bush walking, fishing, bird-watching, sightseeing	Hot/ Cold Showers, toilets, laundry, swimming pool, dining area		Low – medium, unless specific research has been undertaken as part of a planned trip to the region	Desk research
Freshwater Cove	Floatplane, helicopter or boat	Tented accommodation	Kimberley coast, Rock Art, Landscape	Bush walking, fishing, bird-watching, sightseeing, Whale watching	Hot/ Cold Showers, toilets, dining area		Low unless specific research has been undertaken as part of a planned trip to the region	Desk research
Lower Ord Fishing Camps	Access via Parry Creek Road	Bush cabins	Lower Ord River, wildlife, scenery / landscape	Barramundi Fishing, bird-watching, sightseeing	Hot/ Cold Showers, toilets, dining area		Low – medium, unless specific research has been undertaken as part of a planned trip to the region	Desk research

Location	Access	Accommodation	Attractions	Activities	Amenities	Proposed Infrastructure	Awareness	Source of Plan
Cockburn Ranges	No current access	N/A	N/A – due no current access	N/A – due no current access	N/A – due no current access	Iconic Walk Trails	N/A – due no current access	Report yet to be released
Parry Creek Farm & Lagoon	Parry Creek Road	Camping, Caravan park & cabin accommodation	Marlgu Billabong, RAMSAR listed wetland	Camping, bushwalking, bird watching	Restaurant, laundry, swimming pool. Ablutions, fresh water		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Kununurra	Victoria Highway; regional airport	Range of Accommodation	Ord River, Diversion Dam, National Parks, galleries, Ivanhoe Crossing, fishing, boating	Land, air & water tours, fishing, boating	Restaurants/Cafes, fuel, stores, mechanical services,	Increase in Caravan Park capacity Boat Facilities	Low – medium awareness of attractions, activities & amenities unless specific research has been undertaken as part of a planned trip to the region	Tourism Development Priorities 2010-2015 Tourism Development Priorities 2010-2015
Lake Argyle	Sealed (Lake Argyle Road)	Caravan park & cabin accommodation	Lake, Durack Museum	Walking, Boating	Restaurant, swimming pool	Development of Conference Facility		Leaseholder consultation
Doon Doon Roadhouse	Sealed (Great Northern Highway)	Powered / Unpowered Caravan Sites; camping			Laundry , Showers General Store, Fuel, cafe		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012
Warmun Roadhouse	Sealed (Great Northern Highway)	Self Contained Units, motel rooms, dongas, camping; caravan park		Warmun Art Gallery	General Store, laundry, ablutions, fresh water		Low unless specific research has been undertaken as part of a planned trip to the region	KSCS – Investigation of Tourism Initiatives 2012

3.4 Gap Analysis – Infrastructure, Products & Services

For the purpose of consistency with State / TWA tourism plans and strategies, target market segments, as defined by TWA have been used to define key leisure market segments, although sub segments as described in section 3.1 (Market Segmentation) have also been included to improve targeting of requirements. Business and Corporate visitors have also been identified as a key target group and have been included in analysis.

The key target segments that have been attracted to the East Kimberley in the past have been the Dedicated Discovers and Grey Explorers although there have been some changes in recent years with the development and marketing of properties such as El Questro and Berkley River Lodge. It is considered that the Aspirational Achievers are becoming more attracted to the region due to these properties.

Within these key target segments, there are a number of sub-segments. For example, Aspirational Achievers are generally 'pressed for time' and therefore likely to either fly to destinations or consider fly/drive opportunities. There also appears to be adequate evidence to suggest that they are more likely to be from Australia's East Coast. These nuances will be considered as part of the Marketing Plan.

A current inventory of infrastructure, products and services can be found in the previous section of this document.

Gap analysis has been considered against the key criteria of target segments and priority as they relate to the 6As. However, as noted earlier, the industry and operators also have significant impact on the 6As and this has been considered as part of the strategic gap analysis (section 4.2).

Gaps have been identified through the Tourism Corridors project, (KPP, Kimberley Science & Conservation Strategy: Tourism Corridors, 2012), visitor surveys and consultation that formed part of this project.

The following tables outline key issues associated with infrastructure, products and services in relation to each of the targeted market segments and relevant sub-segments:

- Target 1: Grey Explorers
- Target 2: Dedicated Discoverers
  Sub-segment: Adventure Tourism
- Target 3: Business Visitors
- Target 4: Dedicated Discoverers
  Sub-segment: Eco-tourism
- Target 5: Aspirational Achiever
  Sub-segment: Fly-Drive
- Target 6: Corporate Market
- Target 7: Family Connectors

Target Market Segment 1: Grey Explorers

Grey Explorers also known as 'grey nomads' represent the elder age demographic (60+ years). They have lots of time to explore and experience new things and often travel with caravans and campervans thereby reducing accommodation costs while travelling, so their trip can last longer. They are generally 'budget conscious'.

This target segment represents the cornerstone of leisure visitors to the East Kimberley, however the segment will gradually decline and will become a less important segment in the long term. However, it represents the largest single segment to the region currently and will do so for the next decade or so.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Grey Explorer	Access	Main roads and highways into the region all sealed and high quality	Kalumburu Road Upgrade will encourage higher visitation to Mitchell Plateau region in addition to regular maintenance of Parry Creek Road, King River Road, Duncan Highway	SWEK / Lands Dept	Annual / Ongoing	2	$420,000 annually
			Improve condition of Lake Argyle Road as visitors suggest serious safety issues	SWEK		2	Subject to study being undertaken
	Accommodation	There is a good range of caravan and camping options available with some stress points over a couple of weeks of the peak season	Limit new free camping site upgrades to protect business interest of current operators	DPAW / SWEK / TWA	Ongoing	1	Nil
	Attractions	Significant natural landscapes, waterways, natural and cultural histories	Lack of major events to promote shoulder season visitation or extend length of stay. Opportunities need to be fully scoped and key drivers identified – develop events strategy for EK	Eventscorp, Local Industry	Ongoing	2	$25,000
	Activities	Self-guided and organised tours of key sites	Need to develop indigenous cultural tourism products	IBA / Morrgul / MG/ TWA	2014 - 2016	1	Nil[2]
	Awareness	Many East Kimberley sites used to represent the iconic images of the Kimberley	Need more co-ordinated and effective marketing of natural attractions that target identified growth segments	DPaW/ ANW & Industry partners	2014 - Ongoing	1	Refer Marketing Plan

[2] Product development cost noted as nil due to enterprise support available through Morrgul Pty Ltd. Morrgul Pty Ltd is a Business Development Organisation established through negotiations between Native Title Claimant groups (Goolarabooloo / Jabirr Jabirr) and Woodside as part of the onshore gas processing facility that was touted for James Price Point. Woodside has funded the entity for 3 years to provide business development support to Indigenous people across the whole Kimberley region, not just the West Kimberley.

	Amenities	Well serviced towns and visitor information services	More dump points	DPAW / TWA (re C&C Action Plan)	Ongoing	1	Refer WA Caravan & Camping Action Plan
			There are a series of low – moderate level upgrades detailed in the KSCS – Tourism Corridors report that should be reviewed, prioritised and implemented. Many relate to improving signage and visitor information for this market segment	TWA/ DPAW/ SWEK - seek R4R funding	Ongoing	2	Est. at $250,000+
			Improve availability of info for visitors to all the remote areas. This relates to physical conditions and improved signage (road and interpretive)	DPAW, Main Roads WA, SWEK	2014 - Ongoing	2	$30,000
			Upgrade signage in Wyndham at several locations (e.g. Town entry, Lookout etc)	SWEK, Main Roads WA	2014 - Ongoing	2	$25,000
			Need for caravan parking bays in Kununurra shopping precincts	SWEK, Main Roads WA	2014 - 2018	2	Subject to independent study and town planning

Target Market Segment 2: Dedicated Discovers (Sub-segment: Adventure tourism)

Dedicated Discoverers have been defined by TWA as working families 35-64 years wanting to discover something new. This segment is community minded and socially active and is drawn to 'undiscovered' destinations. They tend to have household incomes in excess of $100,000pa and are classed a big discretionary spenders. Motivations for travel include self-development, adventure and engaged observation. The Adventure Tourism sub segment falls under this target segment. This target segment is a high priority to the East Kimberley and is predicted to remain a key market in the medium and long term.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Dedicated Discovers (Adventure Tourism)	Access	Main roads and highways into the region all sealed and high quality. Air access is acceptable with daily services from Darwin and Broome and weekly service from Perth	Key issue is the poor connection of flights to KNX. Visitors from East Coast forced to overnight in Darwin; direct Perth flight weekly only etc. Airlines need to be engaged and business case prepared.	SWEK / Industry	2014 onwards	1	$20,000
	Accommodation	There is a wide range of accommodation including hotels, motels, resorts, apartments and caravan and camping options	Seasonality is a key issue in that accommodation has high occupancy through the dry and poor occupancy over the wet. Reasons to visit the region, particularly in shoulder periods needs attention	Industry	2014 - onwards	1	Refer Marketing Plan (Events)
	Attractions	Significant natural landscapes, waterways, natural and cultural histories	Seasonality is a key issue as many natural attractions have limited access during the wet and shoulder periods			3	
			Development of events to promote shoulder season visitation	Eventscorp / Local Industry	2014-2020	2	Event specific (refer table above)
	Activities	Self-guided and organised tours of key sites	TO's lack clear understanding of mainstream tourism industry. Develop and deliver a series of Tourism Workshops with TO Groups to address this issue so they can make informed decisions about tourism on their lands – future development needs to be guided by TO's.	Indigenous Business Australia/ KDC / /TWA / WAITOC /Traditional Owner Groups/ DPaW	2014	1	$40,000

			Need to develop indigenous tourism products strategy for each key TO group as a priority to attract this market segment	Indigenous Business Australia/ KDC / /TWA / WAITOC /Traditional Owner Groups/ DPaW	2014 – 2018	1	$75,000
			Capitalise on opportunities for Traditional Owners to partner and collaborate with operators to enhance the Kimberley Cruising experience	Wunambal Gaambera/ Balangarra/ Dambimangari/ TWA/ Kimberley Cruise operators/ Morrgul/ WAITOC/ DPaW	2014-2018	1	Nil – product / enterprise development support through Morrgul
			Develop and implement strategies to maximise opportunities to provide land and air-based tours to Cruising visitors (e.g. Bungles flights, Ord River cruises etc). Focus on larger cruise vessels.	Local operators/ TWA	2014-2018	1	Nil – industry driven
	Awareness	Many East Kimberley sites used to represent the iconic images of the Kimberley	Need more co-ordinated and effective marketing of natural attractions that target identified growth segments	Local Industry/ ANW	2014 onwards	1	Refer Marketing Plan
	Amenities	Well serviced towns and visitor information services					

Target Market Segment 3: Business Visitors

Business Visitors are an important segment of East Kimberley tourism, representing over 20% of all visitors. Although this market tends to be Kununurra based with average stay of 3 – 4 days, they represent a low impact, high yield market opportunity. The business travel industry is made up of services geared toward those traveling for business purposes. Such travel services may include transportation (such as airlines and cars), hotel/motel accommodation, as well as allowances for food and beverage needs. Many businesses have separate accounts specifically for business travel necessities. The majority of business travel is domestic rather than international. This segment is seen to be a medium priority in the short and medium terms but increasing to a high priority in the long term.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Business Visitor	Access	Daily air services from Broome and Darwin and weekly service from Perth	Poor connections between other Australian cities to Darwin and Kununurra and direct to Kununurra	SWEK / Industry	2014 onwards	1	Refer table above
	Accommodation	There is a wide range of accommodation including hotels, motels, resorts and self-contained apartments	Development of visitor accommodation at Kalumburu to meet service provider demand	KAC	Ongoing	2	Developer Cost
	Attractions	Not applicable					
	Activities	Not applicable					
	Awareness	Not applicable					
	Amenities	Adequately serviced town	Airport/town shuttle service is required as taxis have proved unreliable	DoT / Morrgul / SWEK	2013 - 2014	1	Nil – subject to feasibility and potential operators interest
			Development of a business services centre and club[3]	Industry / KCCI	2013 - 2016	1	Nil – industry driven
			Greater range of eating venues	Industry	2014 onwards	2	Nil – industry driven

[3] Reference to a business services centre is premised on meeting the needs of 'business visitors' in terms of having a 'virtual office' available in Kununurra.

Target Market Segment 4: Dedicated Discovers (Sub-segment: Eco tourism)

Dedicated Discoverers have been defined by TWA as working families 35-64 years wanting to discover something new. This segment is community–minded, socially active and is drawn to 'undiscovered' destinations. They tend to have household incomes in excess of $100,000pa and are classed a big discretionary spenders. Motivations for travel include self-development, adventure and engaged observation. The Eco Tourism sub segment falls under this target segment. This target segment is a medium priority to the East Kimberley in the short term but rising to a high priority segment in the medium to long term as product is developed and marketed.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Dedicated Discoverer (Eco Tourism)	Access	Main roads and highways into the region all sealed and high quality. Air access is provided with daily services from Darwin and Broome and weekly service from Perth.	Key issue is the poor connection of flights to KNX. Visitors from East Coast often need to overnight en-route; direct Perth flight weekly only etc	SWEK / Industry	2014 onwards	1	Refer table above
	Accommodation	There are a number of eco-tourism accommodation options in remote regions of the East Kimberley	Development of Eco-tourism facility closer (and more accessible) to Kununurra e.g. Ngamoowalem Conservation Reserve	TWA / SWEK / DPaW / MG	2016 - 2020	2	Subject to feasibility and scale of development
	Attractions	Significant natural landscapes, waterways, natural and cultural histories	Seasonality is a key issue as many natural attractions have limited access during the wet and shoulder periods			3	
	Activities	Self-guided and organised tours of key sites	Need to develop indigenous products as a priority to attract this market segment	IBA / Morrgul / MG/TWA / WAITOC	2014 - 2016	1	Refer table above
	Awareness	Many East Kimberley sites used to represent the iconic images of the Kimberley	Need more co-ordinated and effective marketing of natural attractions that target identified growth markets	ANW	2014 onwards	1	Refer Marketing Plan

	Amenities	Well serviced towns and visitor information services					

Target Market Segment 5: Aspirational Achievers (Sub-segment: Fly/Drive)

Aspirational Achievers are defined by TWA as working families 35-64 years who have achieved success (e.g. 'made it') in their chosen field. They travel frequently and spend big on holidays as a means of reward. They enjoy holidays that involve resorts, wine, food and activities and are generally 'pressed for time' and therefore likely to take shorter, more frequent breaks. They are classed as big discretionary spenders. Motivations for travel include indulgence, relaxation and variety. The fly/drive sub segment falls under this broad target definition. This segment is currently a low priority for the East Kimberley but is seen to increase in priority over the medium term and become a high priority segment in the long term. Much will be dependent upon the improvement of air services to the region.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Aspirational Achiever (Fly/Drive)	Access	Daily air services from Broome and Darwin and weekly service from Perth	Poor connections between other Australian cities to Darwin and Kununurra and direct to Kununurra	SWEK / Industry / KCCI / TWA	2014 onwards	1	Refer table above
	Accommodation	There is a wide range of accommodation including hotels, motels, resorts and self-contained apartments. There are a number of (remote) high end options including The Homestead and the Berkeley River Lodge	There is no flagship property in Kununurra	Industry / SWEK / Landgate / RDL / TWA / KDC	2014 - 2018	3	Developer cost
	Attractions	Significant natural landscapes, waterways, natural and cultural histories	Seasonality is a key issue as many natural attractions have limited access during the wet and shoulder periods			3	
	Activities	Self-guided and organised tours of key sites and major events (ORM)	Indigenous product needs to be developed	IBA / Morrgul / MG / TWA	2014 – 2016	1	Nil – refer Morrgul
			As this segment is particularly time poor, the development of the Kimberley Aerial Highway	TWA / Industry	2013 - 2018	2	Refer TWA Tourism Initiatives Study
	Awareness	Awareness principally through airline magazines, high end travel magazines, mainstream press etc and promotion of specific properties	Need more collaborative and effective marketing campaign of high end accommodation and tour product	Industry / ANW	2014 onwards	1	Refer marketing Plan

	Amenities	Kununurra is a well serviced centre	There are limited eating and drinking venues to meet expectations of this market segment (within KNX)	Industry / KCCI	Ongoing	2	Proponent cost
			Kununurra requires a "facelift" and improvements to street scapes	SWEK	2015 – 2020	2	Subject to project scoping and study

Target Market Segment 6: Corporate Market

Corporate Market - This industry includes companies involved in organising and hosting exhibitions and conferences. Industry revenue comes from venues (for example, convention centres and hotels) that are hired for events. Revenue also comes from event organisers and typically generated from venue hire, registration fees, food and beverage, and accommodation (IBISWorld Industry Reports, 2012). The market is valued at around $14.5b globally with a forecast growth rate of 0.2% (2013-2018).

There are four main types of events held in the industry: exhibitions, conferences, incentive events and meetings. The events are defined by the Business Events Council of Australia.

1. Exhibitions are large events where companies display their products and services. They include trade shows such as the Melbourne International Motor Show and popular culture shows such as the Armageddon Expo. Most exhibitions are held at convention and exhibition centres (e.g. the Brisbane Convention and Exhibition Centre). This sector is not seen to offer opportunities for the East Kimberley.
2. Conferences, also known as conventions, refer to gatherings of people with similar interests and can be for corporate or private purposes. Many conventions host small exhibitions. Examples include conventions by industry associations or by science fiction societies. Conventions are typically smaller than exhibitions in size, with about 100 to 500 attendees per event on average. This segment suffered slightly during the downturn but has since recovered. This sector is seen to have opportunities for the East Kimberley over time.
3. The incentives section refers to incentive programs whereby organisations offer trips to motivate employees. Incentive events are similar to business meetings and small-scale exhibitions but are generally smaller and have the main purpose of motivating or rewarding staff. Large companies, often within the pharmaceutical and information technology sectors, generally host incentive events. This segment depends on international and interstate demand. This reliance led to incentive events in particular suffering during the downturn. Furthermore, the strong dollar negatively affected this segment however, this is seen as a key segment for the East Kimberley.

4. Meetings include corporate, government and association meetings. Meetings and Events Australia defines a meeting as a gathering that is outside of the office, hosted at a commercial venue and with at least 15 delegates. More than half of meetings are corporate events and generally last five days or less. The global economic downturn and poor business sentiment led to lower demand for meetings in 2008-09 but demand is estimated to have recovered and grown since. This sector is also seen to hold opportunities for the East Kimberley.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Corporate	Access	Daily air services from Broome and Darwin and weekly service from Perth	Poor connections between other Australian cities to Darwin and Kununurra and direct to Kununurra	SWEK / Industry / KDC	2014 onwards	1	Refer tables above
	Accommodation	There is a wide range of accommodation including hotels, motels, resorts and self-contained apartments					
	Attractions	Significant natural landscapes, waterways, natural and cultural					
	Activities	Customised touring and sightseeing options					
	Awareness	Many East Kimberley sites used to represent the iconic images of the Kimberley	Ability to customise product, venue, touring options etc need to be co-ordinated and targeted to this segment	Industry / ANW / KCCI / KDC	2018 - 2020	3	Nil – industry driven initiative
	Amenities	Adequately serviced town	Airport/town shuttle service is required as taxis have proved unreliable	DoT / Morrgul / SWEK	2013 - 2014	1	Nil – subject to separate study currently underway
			There are limited suitable conference facilities in the East Kimberley (Kimberley Grande, The Berkeley Resort). Both The Country Club and Lake Argyle Resort have plans to build conference facilities	Industry	2014 - 2020	2	Nil – developer cost

			Greater range of eating venues	Industry / KCCI / KDC / SBDC	2016 onwards	2	Nil – industry driven

Target Market Segment 7: Dedicated Discoverers (Sub-Segment: Cultural Tourism)

Dedicated Discoverers have been defined by TWA as working families 35-64 years wanting to discover something new. This segment is community minded and socially active and is drawn to 'undiscovered' destinations. They tend to have household incomes in excess of $100,000pa and are classed a big discretionary spenders. Motivations for travel include self-development, adventure and engaged observation. The Cultural Tourism sub segment falls under this target segment. This target segment is low priority to the East Kimberley in the short term but rising to a medium priority segment in the medium and high priority in the long term as product is developed and marketed.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Dedicated Discoverer (Cultural Tourism)	Access	Main roads and highways into the region all sealed and high quality. Air access is acceptable with daily services from Darwin and Broome and weekly service from Perth	Key issue is the poor connection of flights to KNX. Visitors from East Coast forced to overnight in Darwin; direct Perth flight weekly only etc	SWEK / Industry / KDC	2014 onwards	1	Refer tables above
			Kalumburu Road Upgrade will encourage higher visitation to Mitchell Plateau region and complement Indigenous tourism product development	SWEK / Lands Dept	2014 onwards	1	$420,000+
	Accommodation	There is a wide range of accommodation including hotels, motels, resorts, self-contained apartments and caravan, camping and chalet options	Development of Indigenous owned and operated facility within reach of Kununurra (MG Lands) e.g. Ngamoowalem Conservation Reserve	MG /TWA / DPaW	2016 - 2020	2	Refer tables above
			Development of visitor accommodation and visitor services centre at Kalumburu	KAC	Ongoing	2	Developer Cost
	Attractions	Significant natural landscapes, waterways, natural and cultural histories including rock art sites	Development of Darram Wetlands & Cultural Centre	MG / DPaW	2016 – 2020	3	Developer Cost
	Activities	Self-guided and organised tours of key sites	Need to develop indigenous products as a priority to attract this market segment	IBA / Morrgul / MG/TWA/ Gelganyem/ WG/ Balangarra / WAITOC	2014 - 2016	1	Nil - product / enterprise development support through Morrgul

			Capitalise on opportunities to develop cultural tourism products as part of Kimberley Cruising experience	Cruise operators/ Morrgul/ TWA/ Wunambal Gaambera / Balangarra / Dambimangari / WAITOC			
			Development of "camping with custodians"	Awaiting consultant recommendations			Awaiting consultant recommendations
	Awareness	Many East Kimberley sites used to represent the iconic images of the Kimberley	Need targeted marketing of cultural values of the region once product, services and infrastructure have been developed / built	ANW / MG / TWA/ WG	2015 onwards	3	Refer Marketing Plan
	Amenities	Well serviced towns and visitor information services					

Target Market Segment 7: Family Connectors

Family Connectors use holidays to connect with children, partners and other family members. TWA definitions suggest that this segment is represented across a wide range of age demographics. The segment is generally self-drivers and travel to traditional family destinations. The greatest opportunity for the East Kimberley is seen to market to the regional (Kimberley, Pilbara and NT) markets as accessibility (and time) are destination considerations.

Target Segment	6As	Competitive Advantage	Development Issue	Lead Agency	When	Priority High (1) Medium(2) Low (3)	Est. Cost
Family Connectors	Access	Main roads and highways into the region all sealed and high quality and less than half a day from Katherine and day from Broome	Regular maintenance of Kalumburu Road, King River Road, Parry Creek Road and Duncan Highway will encourage higher visitation and promote extended length of stay.	SWEK / Lands Dept.	Annual	2	$420,000 +
			Improve condition of Lake Argyle Road as visitors suggest serious safety issues	SWEK	Ongoing	2	Subject to project study
	Accommodation	There is a good range of caravan, camping, chalet and self-contained apartment options available with some stress points over a couple of weeks of the peak season					
	Attractions	Significant natural landscapes, waterways, natural and cultural histories	Development of Darram Wetlands & Cultural Centre	MG / DPaW	2016 – 2020	3	Developer Cost
	Activities	Self-guided and organised tours of key sites	Family focused activities will continue to be developed to meet demand	Industry / Tour operators / Accommodation providers	Ongoing	2	Nil – industry driven
	Awareness	Many East Kimberley sites used to represent the iconic images of the Kimberley	Need more co-ordinated and effective marketing of natural attractions that target identified growth segments	ANW	2014 - Ongoing	1	Refer Marketing Plan
	Amenities	Well serviced towns and visitor	More dump points	TWA	Ongoing	3	Refer WA Caravan

		information services					& Camping Action Plan
			Improve availability of info for visitors to all the remote areas. This relates to physical conditions and improved signage (road and interpretive)	DPAW/ Main Roads WA	2015 - Ongoing	2	$30,000
			Upgrade signage in Wyndham at several locations (e.g. Town entry, Lookout etc)	Main Roads WA / SWEK	2015 - Ongoing	2	$25,000
			Need for caravan parking bays in Kununurra shopping precincts	Main Roads WA / SWEK	2014 - 2018	2	Subject to project study & town planning

4. Working Towards 2022

4.1 Strategic Objectives

Strategic objectives are considered fundamental to articulating core target markets and therefore, the infrastructure, products and services that need to be developed in order to increase visitation.

Strategic objectives have been developed based on the Vision documented in SWEK's Strategic Community Plan 2012 - 2022.

For the Shire to be a thriving and vibrant community with unlimited opportunities.

This Vision reflects the social, environmental and economic contributors to the East Kimberley region. In terms of economic development, SWEK identified its key strategic objective as:

To work in partnership with government, community and industry leaders to promote and provide opportunities for economic and social growth across the Shire.

This key objective has been considered in terms of its relationship to tourism. Therefore the goal for tourism has been based on growth. Currently, the tourism sector in the East Kimberley is estimated to be valued at around $100.5 million per annum. This is based on accommodation valued at around $33.7m and a further $1.98 (for every accommodation dollar) being spent on tours, restaurants, hire cars/taxis and retail. (KPP, Kimberley Science & Conservation Strategy: Tourism Corridors, 2012).

Based on the vision and key economic objective of SWEK, the tourism goal for 2022 is:

To increase the value of tourism to the East Kimberley from $100.5m in 2013 to $130m by 2022

This can be achieved through developing actions around the following four (4) strategic objectives:

1. Targeting growth markets (Target market segments, including Business);
2. Improving access (Making it easier to get to the region);
3. Building the value tourism (both visitor and resident perspectives); and
4. Developing product and services to meet expectations of target market segments.

4.2 Strategic Objectives Gap Analysis & Recommended Action Plan

Rationale for Recommended Actions

Recommended actions have been based on input from:

- existing tourism initiatives and plans (secondary research);
- visitors (primary research); and
- industry and regional operators (consultation).

Recommended Actions listed below focus on activities that are, to some extent, within the influence and control of the East Kimberley region. In this report it is viewed that (i) there is little value in duplicating externally driven plans beyond endorsement and support; and (ii) that ratepayer income to SWEK should directly support East Kimberley tourism. The need to focus on activities that are within the control of the East Kimberley Shire and operators has been evidenced by the recent formation of a local operator marketing group.

Recommended actions in this Plan acknowledge the importance of the 6As of tourism but emphasis has been placed on industry inputs. For example, there is no value in improving access to make it easier for visitors to get to the region if there is little community support for tourism or developing new activities that are not clearly targeted (in price and content) to a clear market segment.

The four objectives below are considered within the sphere of influence and control for SWEK:

1. Targeting growth markets that are relevant to the East Kimberley
2. Improving access to the East Kimberley
3. Building the value of tourism in the East Kimberley
4. Developing new and existing tourism products (including events) to meet the expectations of the targeted market segments

Recommended strategic actions against each of these objectives are detailed in the table below:

Key Strategic Objective 1: Targeting Growth Markets

Strategic Objective	Current Position	Current Gaps	Recommended Actions	Who	When	Est. Cost
1. Targeting Growth Markets	Caravaners and campers are the cornerstone of the East Kimberley visitor market and will remain so in the foreseeable future however, this is a (slowly) declining market segment. Most external strategies focusing on the East Kimberley region are targeted to this market segment.	Failure to identify core target groups such as the business market (estimated at around 20% of all visitors to KNX); the fly/drive market (growth segment); the east coast markets (higher yield). The East Kimberley currently lacks marketing capacity to penetrate target growth markets	1. Categorise and prioritise target market segments based on growth trends and yield.	Refer 3.1 and 3.4	Refer 3.4	Nil
			2. Implement an on ongoing research programme to track market trends and performance to help guide and improve current and new product development	Distributed and analysed by a contracted party with collaboration of regional accommodation & service providers, and tour operators	Ongoing	$24,000pa
			3. Develop a mechanism to raise monies to market the region to key target markets	SWEK / Operator Marketing Group/ KCCI	2014	Nil – industry driven
			4. Use web analytics to manage website and inquiry tracking to assess marketing efforts and share results	KVC	Ongoing	Nil – industry driven
			5. Support and develop major festivals and events that are or have the ability to extend visitation to the shoulder seasons. Scope events possibilities (e.g. commission a study)	Local industry, private sector, KCCI, Eventscorp – seek R4R funding	Ongoing	Event specific -Subject to scoping study being completed
			6. Ensure the region's marketing efforts are strategic, aligned & communicate with growth target segments	Marketing Operators Group, ANW	Ongoing	Refer Marketing Plan

Key Strategic Objective 2: Improving Access to the East Kimberley

Strategic Objective	Current Position	Current Gaps	Recommended Actions	Who	When	Est. Cost
2. Improving Access	It is estimated that SWEK region attracts around 115,000 visitors. Of this total, around 45% are CCC while around 36% (business & fly/drive segment) arrive by air.	Connecting flights from Darwin and Perth are poor with no direct flights from other ports.	1. Develop strategy and business case to present to Qantas, Airnorth and Virgin to support the case for improved connecting services and new routes.	SWEK / TWA / Operator Marketing Group / KCCI	2014 - 2016	Cost of preparing business case estimated at $20,000
		A number of minor roads (Gibb, Kalumburu) are in need of regular (and costly) maintenance and grading. Improving road conditions to ensure greater consistency will encourage higher visitation.	2. Develop strategy and business case for purpose of securing recurrent funding for road maintenance – link back to Value of Tourism and strategic priorities	SWEK	2014-2015	Nil (internal action)
		Access between the airport and the town centre has been raised as an issue by key target segments. The introduction and marketing of such a service will improve the overall experience, particularly of business visitors who account for over 20% of visitors.	3. Develop and document feasibility of introducing an airport shuttle service and identify potential operator.	IBA / Morrgul / SWEK/ DoT	March 2014	Nil – feasibility study currently underway

Key Strategic Objective 3: Building the Value of Tourism

Strategic Objective	Current Position	Current Gaps	Recommended Actions	Who	When	Est. Cost
3. **Building the value tourism**	Tourism is the 2nd largest contributor to the East Kimberley economy.	There is a low level of understanding by residents in relation to the value of tourism to the local economy. Visitors are generally resented, rather than valued.	1. Develop SWEK Tourism portfolio so that there is someone on Council who is an advocate for tourism. This also demonstrates the importance of the industry to the local economy.	SWEK	Nov 2013	Nil – internal action
			2. Strengthen tourism in the East Kimberley through collaborative leadership. (Determine which organisation/individuals can take on the leadership role).	SWEK / TWA / Operator Marketing Group / KCCI/ DPaW	March 2014	Cost of meeting & moderator
			3. Report the positive impacts, events, activities and developments in tourism via monthly column in the Kimberley Echo.	KVC , SWEK Advocate, KCCI, Local operators	Jan 2014 onwards	Nil – industry driven
			4. Present Annual Tourism Update to East Kimberley Stakeholders	TWA SWEK / KCCI, Operator Marketing Group	Nov/Dec 2014 (annual)	$5,000
			5. Improve service standards and knowledge of the region so that visitors have the best information presented in a manner that expresses their value.	KVC, KCCI / SBDC	March 2014	Cost of famils (usually borne by provider) and customer service initiatives
			6. Develop and implement a plan that encourages local business to become visitor friendly	KCCI / Industry group	March 2014	$15,000
			7. Target business opportunities that support and complement tourism growth objectives	KCCI / Industry group	Ongoing	Nil – industry driven

Key Strategic Objective 4: Developing Product and Services to Meet Expectations of Target Market Segments

Strategic Objective	Current Position	Current Gaps	Recommended Actions	Who	When	Est. Cost
4. **Developing product and services to meet expectations of target market segments**	Current products & services meet the needs of the CCC market to a large extent	There is a gap in the range of accommodation offerings & tour products to meet target markets outside KNX, particularly in relation to Indigenous tourism products.	1. Develop eco camps, resorts, products and experiences to meet higher-end markets	TWA / Naturebank / MG / DPaW	2014 - 2016	Developer / operator cost
		Current & future visitors believe they are not getting the indigenous experience that is expected	2. Increase capacity, skills and industry knowledge for indigenous people to work in tourism and develop product for the visitor market – e.g. Tourism Workshops, Develop Product Strategy for each TO group 3. Partner with MG Corp to progress proposed tourism developments within Ngamoowalem Conservation Reserve 4. Partner with Wunambal Gaambera to facilitate the development of cultural tourism opportunities outlined in their Healthy Country Plan. Collaborate closely with the Kimberley Cruising operators.	IBA / Morrgul / TWA/ WAITOC/ KDC TWA/ DPaW/ Local Industry TWA/ WG/ Kimberley Cruise Operators/ Morrgul	2014 - 2016	$40,000 (Workshops) $75,000 (Product Strategies) Developer cost Nil – support available through Morrgul
		The business sector represents around 22% of the visitor market but there are few products and/or services designed to cater for their specific needs	5. Develop products that meet the needs of the business visitor such as reliable transfer services (airport to town/hotels); business club; check-in/check-out times around flight times; etc	Operators Marketing Group / KCCI	2014 - 2016	Industry driven - Operator / developer cost
		KNX looks tired and therefore does not have appeal to visitors as a destination but simply a gateway to other Kimberley destinations	6. Develop a community consultation strategy that looks to provide input from residents & visitors that prioritises work to be undertaken that will maximise length of stay, support local business and increase visitor spend.	SWEK	2014	Subject to scoping of project

		There is a need to develop more events that promote visitation during shoulder season periods, particularly the outward shoulder.	7. Scope event possibilities (e.g. commission a study / feasibility) in relation to: Indigenous Cultural Festival Bird-watching Fishing (Competitions)[4] Water-based activities	KCCI, SWEK, Eventscorp, Local industry – seek R4R funding	2014-2016	$20,000

[4] Stocking of Lake Kununurra with over half a million barra fingerlings over the next 3 years provides scope to develop these types of events that will benefit the tourism industry

Vision

Increase the value of tourism to the East Kimberley from $100.5m in 2013 to $130m by 2022

Strategic Objectives

- Targeting growth markets — Grey Explorers, Dedicated Discoverers
- Improving Access
- Build the value of tourism
- Develop product and services to meet needs and expectations of target market

Strategic Actions

Targeting growth markets

1) Categorise & prioritise target market segments.

2) Implement an ongoing research program to track market trends and performance to help guide and improve current & new product development.

3) Develop a mechanism (head tax, bed tax, airport levy etc) to raise monies to market the region to key target markets.

4) Use web analytics to manage website and inquiry tracking to assess marketing efforts and share results.

5) Support and develop major festivals and events that are or have the ability to extend visitation to the shoulder seasons.

6) Ensure the region's marketing efforts are strategic, aligned and communicate with the growth target segments. (ie.Dedicated Discoverers, Business, Corporate)

Improving Access

1) Develop strategy and business case to present to Qantas, Airnorth and Virgin to support the case for improved connecting services and new routes.

2) Develop strategy and business case for purpose of securing recurrent funding for road maintenance - link back to Value of Tourism and strategic priorities.

3) Develop and document feasibility of introducing an airport shuttle service and identify possible operator.

Build the value of tourism

1) Develop SWEK Tourism portfolio so that there is someone on Council who is an advocate for tourism. This also demonstrates the importance of the industry to the local economy.

2) Strengthen tourism in the East Kimberley through collaborative leadership. Determine which organisation/individuals can take on the leadership role.

3) Report the positive impacts, events, activities in tourism via monthly column in the Kimberley Echo.

4) Present Annual Tourism Update to East Kimberley Stakeholders.

5) Improve service standards and knowledge of the region so that visitors have the best information presented in a manner that expresses their value.

6) Develop a plan that encourages local business to be visitor friendly.

7) Target business opportunities that support tourism growth.

Develop product and services to meet needs and expectations of target market

1) Develop eco camps, resorts, products and experiences to meet higher-end markets.

2) Increase the capacity, skills and industry knowledge for Indigenous people to work in tourism and develop product for the visitor market.

3) Develop products that meet the needs of the business visitor such as reliable transfer services (airport to town/hotels); business club; check in/check out times around flight times etc.

4) Develop a community consultation strategy that looks to provide input from residents and visitors that prioritises work to be undertaken that will maximise length of stay, support local business and increase visitor spend.

5) Scope event possibilities (e.g. commission a study /feasibility in relation to an Indigenous Cultural Festival; Bird Watching; Fishing; Water based activities.

Works Cited

Kimberley Land Council. (2004). *Department for Planning & Infrastructure.* Retrieved August 2012, from North Kimberley Report: http://www.planning.wa.gov.au/dop_pub_pdf/n-kimb_report.pdf

Naturebank. (2011). Retrieved June 20, 2013, from Tourism West Australia: http://www.tourism.wa.gov.au/Archive/Pages/Naturebank.aspx

Western Australia Cruise Shipping Strategic Plan. (2012, November). Retrieved June 13, 213, from Tourism West Australia: http://www.tourism.wa.gov.au/Publications%20Library/Infrastructure%20and%20Investment/Cruise%20shipping/Tourism%20WA%20Cruise%20Shipping%20Strategic%20Plan%202012-2020%20WEB%20pdf%20%282%29.pdf

Abbotts, T. (2012). *History of the Kimberley*. Retrieved July 30, 2012, from Gibb River Road: http://www.gibbriverroad.net/

Australian Broadcasting Corporation . (n.d.). *Message Stick* . Retrieved from http://www.abc.net.au/tv/messagestick/stories/s3394040.htm

Avdata. (2012). *Aviation data, Broome and Kununurra 2009-2011.* unpublished.

Brighthouse. (2009). *Kununurra Caravan park Pre-y Study.* Perth: Tourism WA.

Brighthouse. (2010). *The WALGA, Kimberley Zone: Tourism Caravan & Camping Business Case Study.* Perth: Tourism WA.

Buxton, N. (2012). *Mitchell Plateau*. Retrieved August 12 , 2012, from 4WD Online : http://www.4wdonline.com/Places/Au/WA/MitchellPlateau.html

Caravan, RV & Accommodation Industry of Australia Ltd. (2012). *Caravan and Campervan Data Report.* Brisbane: CRVA.

Collis, S. &. (2010). *The Guide to Free Camping in the North of WA.* Self published.

Department of Education Employment and Workplace Relations. (2011, October 19). *Indigenous Economic Development Strategy 2011-2018*. Retrieved August 11, 2012, from DEEWR: http://www.deewr.gov.au/Indigenous/Employment/Pages/IEDS2011_2018.aspx

Department of Energy Tourism and Resources and Tourism Australia. (2011, December). *Tourism 2020 Overview.* Retrieved October 2012, from Tourism Australia: http://www.tourism.australia.com/Tourism_2020_overview.pdf

Department of Environment & Conservation (b). (2012). *Park Finder*. Retrieved August 2012, from DPAW: http://www.dec.wa.gov.au/component/option,com_hotproperty/task,view/id,39/Itemid,1584/

Department of Environment & Conservation. (n.d.). *Derby Visitor Centre* . Retrieved August 2012, from Beyond the Boabs: http://www.derbytourism.com.au/pages/mitchell-plateau/

Department of Environment and Conservation. (2010, September). *Kimberley Science & Conservation Strategy*. Retrieved June 13, 2013, from Department of Environment & Conservation: http://www.dec.wa.gov.au/management-and-protection/land/major-initiatives/kimberley-science-and-conservation-strategy.html

Department of Environment and Conservation. (2012). Perth: unpublished.

Department of Environment and Conservation. (2012). *Geiki Gorge, Tunnel Creek and Windjana Gorge*. Retrieved August 9, 2012, from EveryTrail: http://www.everytrail.com/guide/geikie-gorge-tunnel-creek-and-windjana-gorge-national-parks

Department of Regional Development & Lands. (2011). *Royalties for Regions.* Retrieved October 21, 2012, from Department of Regional Development & Lands: http://www.rdl.wa.gov.au/publications/Documents/RoyaltiesforRegionsOverarchingBrochure2011.pdf

Derby Visitor Centre. (2012). *Beyond the Boabs*. Retrieved August 2012, from http://www.derbytourism.com.au/pages/history/

FAHCSIA. (n.d.). *Indigenous Capability and Development Program*. Retrieved August 10, 2012, from http://www.fahcsia.gov.au/our-responsibilities/indigenous-australians

IBISWorld. (2013). *Caravan Parks and Camping Grounds in Australia.* Melbourne: April.

IBISWorld Industry Reports. (2012). *Exhibitions and Conference Centres in Australia.* Melbourne: IBISWorld.

Indigenous Business Australia. (2012). *Indigenous Business Australia Webpage*. Retrieved 2012, from http://www.iba.gov.au

Kadar, K. (2005). *Kimberley Cultural Trail.* Broome, Western Australia: Broome Arts and Music Festival.

Kimberley Land Council. (n.d.). *Rangers.* Retrieved 8 12, 2012, from Kimberley Land Council: http://klc.org.au/rangers/

KPP Business Development (2009). *Kununurra Accommodation Study.* Perth: Tourism WA.

KPP Business Development (2012). *Kimberley Science & Conservation Strategy: Kimberley Aerial Highway.* Perth: Tourism WA.

KPP. (2012). *Kimberley Science & Conservation Strategy: Tourism Corridors.* perth: Tourism WA.

KPP Business Development. (2008). *State of Tourism.* Perth: Tourism WA.

KPP Business Development. (2012). *Kalumburu Pre-Feasibility Study.* Perth: Tourism WA.

KPP Business Development. (2012). *Kimberley Science & Conservation Strategy: 4WD Expedition Tracks.* Perth: Tourism WA.

Main Roads WA. (2012). *Main Roads WA*. Retrieved August 2, 2012, from Main Roads WA: http://www.mainroads.wa.gov.au/AboutMainRoads/OurRoleRegions/MidWest/RoadInfo/Pages/rd_network.aspx

PROBE Tourism Design Planning & Management. (2008). *Savannah Way Infrastructure Report.* Savannah Way Ltd.

Roy Morgan Research. (2012). *Drive Market Report June 2012.* Darwin: Tourism NT.

Savannah Way. (n.d.). Retrieved June 14, 2013, from Savannah Way: http://www.savannahway.com.au/

Savannah Way Limited. (n.d.). *Savannah Way*. Retrieved August 2, 2012, from Savannah Way: http://www.savannahway.com.au/

Savannah Way Ltd (b). (n.d.). *Savannah Way - Australia's Adventure Drive*. Retrieved August 2012, from http://www.savannahway.com.au/

Science Network Western Australia. (2012). *The Kimberley Science of Conservation Strategy*. Retrieved August 12, 2012, from http://www.sciencewa.net.au/explore-by-region/kimberley-science-portal/kimberley-science-and-conservation-strategy-

Science Network Western Australia. (n.d.). *The Kimberely Science of Conservation Strategy*. Retrieved August 12, 2012, from http://www.sciencewa.net.au/explore-by-region/kimberley-science-portal/kimberley-science-and-conservation-strategy-

Shire of Wyndham East Kimberley. (n.d.). *Strategic Community Plan 2012 - 2022.* Kununurra: SWEK.

Tourism Australia. (2012). *Australia's National Landscapes*. Retrieved June 19, 2013, from australia.com: http://www.australia.com/campaigns/nationallandscapes/index.htm?ta_cid=redirect:au:nl

Tourism Australia. (2012). *Australia's National Landscapes*. Retrieved October 20, 2012, from Tourism Australia: http://www.tourism.australia.com/en-au/marketing/5651_5544.aspx

Tourism Australia. (2013). *Campaigns*. Retrieved August 27, 2013, from Tourism Australia: http://tourism.australia.com/campaigns.aspx

Tourism Australia. (2013). *Markets*. Retrieved August 29, 2013, from Tourism Australia: http://tourism.australia.com/markets/our-target-consumers.aspx

Tourism Naturally. (2009). *Tourism Prospects on Miriuwung Gajerrong Conservation Lands Reprot 1.* Perth: Toursim WA.

Tourism Naturally. (2010). *Tourism Prospects on Miriuwung Gajerrong Conservation Lands Report 2.* Perth: Tourism WA.

Tourism Research Australia. (2013). *Caravan or Camping in Australia.* Canberra: Department of Resources, Energy and Tourism.

Tourism Resource Consultants Limited. (2010). *Kimberley National Landscape Experience Development Strategy.* Broome: Kimberley National Landscapes.

Tourism Top End. (2013). *Strategic Plan 2013-2015.* Darwin: Tourism Top End.

Tourism WA. (2009). *Tourism Development Priorities* . Retrieved June 14, 2013, from Tourism Western Australia: http://www.tourism.wa.gov.au/Policies_Plans_Strategies/tourism_policy_planning/Pages/Destination_Development_Strategy.aspx

Tourism WA. (2010). *Indigenous Tourism*. Retrieved June 15, 2013, from Tourism Western Australia: http://www.tourism.wa.gov.au/Policies_Plans_Strategies/Pages/Indigenous_Tourism.aspx

Tourism WA. (2012). *China Strategy*. Retrieved June 14, 2013, from Tourism Western Australia: http://www.tourism.wa.gov.au/Industry_Resources/China_industry_toolkit/Pages/China_Strategy.aspx

Tourism WA. (2013). *Caravan & Camping Action Plan 2013-2018.* Perth: Tourism WA.

Tourism WA. (2013). *Marketing Activities*. Retrieved August 27, 2013, from Tourism WA Corporate Site: http://www.tourism.wa.gov.au/marketing/Marketing_activities/Pages/Marketing_Campaigns.aspx

Tourism WA. (n.d.). *landbank Program*. Retrieved June 14, 2013, from Tourism Western Australia: http://www.tourism.wa.gov.au/Infrastructure_and_Investment/Current_Tourism_Development_Opportunities/Landbank_program/Pages/Landbank_Program.aspx

Tourism WA. (n.d.). *Strategic Plan*. Retrieved June 15, 2013, from Tourism Western Australia: http://www.tourism.wa.gov.au/Policies_Plans_Strategies/tourism_policy_planning/Pages/Destination_Development_Strategy.aspx

Tyler, I. (2000). *Geology and Landforms of the Kimberley.* Western Australia: Department of Conservation and Land Management .

Unknown. (2012, June 7). *Gibb River Road - '1'*. Retrieved July 30, 2012, from www.travelblog.org:

http://www.travelblog.org/Oceania/Australia/Western-Australia/Gibb-River-Road/blog-726333.html

WAITOC. (n.d.). *Western Australian Indigenous Tourism Operators Council*. Retrieved August 10, 2012, from http://www.waitoc.com/

WAITOC. (n.d.). *WAITOC Strategic Plan 2011-2015*. Retrieved June 13, 2013, from WAITOC: http://www.waitoc.com/strategic-plan-2011-2015

Wikipedia. (2012, July 14). *Great Northern Highway*. Retrieved July 30, 2012, from Wikipedia: http://en.wikipedia.org/wiki/Great_Northern_Highway

Yuco Pty Ltd. (2003). *Impact of Tourism on the Gibb River Road - A Community Perspective.* Broome: Cooperative Research Centre for the Tropical Savannah and the Land & Sea Unit, Kimberley Land Council.

APPENDICES

Appendix 1
Secondary Research – Detailed Findings

List of Reports Reviewed

State Government Strategy for Tourism in Western Australia 2020, Tourism WA

Making a Difference: Aboriginal Tourism Strategy for Western Australia 2011-2015, Tourism WA

Caravan & Camping Action Plan 2012-17, Tourism WA

WA Cruise Shipping Strategic Plan 2012-2020, Tourism WA

Landbank Program, Tourism WA

Naturebank Program, Tourism WA

Australia's National Landscapes: The Kimberley, Tourism Australia

Australia's North West Tourism Development Priorities 2010-2015, Tourism WA

Kimberley Science & Conservation Strategy 2012, DPAW

Kimberley Science & Conservation Strategy initiatives:

- *Kimberley Aerial Highway 2012-13 Campaign*, Tourism WA
- *Kimberley Science & Conservation Strategy Investigation of Tourism Initiatives Kimberley Tourism Corridors*
- *Kimberley Science & Conservation Strategy Investigation of Tourism Initiatives Aerial Highway*
- *Kimberley Science & Conservation Strategy Kalumburu Pre-feasibility Study*
- *Kimberley Science & Conservation Strategy Investigation of Tourism Initiatives 4WD Expedition Routes*

Kununurra Accommodation Study 2009, Kadar Pearson and Partners

Kununurra Caravan Park Pre-feasibility Study, 2009 Brighthouse

Kimberley WALGA Zone Caravan and Camping Business Case Study, 2010 Brighthouse

Tourism Prospects on Miriuwung Gajerrong Conservation Lands Report 1 Aug 2009 Tourism Naturally Internal report

Tourism Prospects on Miriuwung Gajerrong Conservation Lands Report 2 Jan 2010 Tourism Naturally Internal Report

WAITOC Holiday Planner, WAITOC

Drive Market Report, June 2012 Roy Morgan Research

Savannah Way

Tourism Top End Strategic Plan 2013-2015 –Draft

Tourism NT Fact Sheets

Strategic Community Plan 2012 to 2022 Shire of Wyndham East Kimberley

Plan for the Future 2008-2013 Shire of Wyndham East Kimberley

1. Secondary Research-Overview

A wide range of strategies have been developed that will impact the SWEK region. These include State and Federal governments; State agencies; and tourism bodies. Prior to a review of these plans and strategies, work completed by KPP Business Development (KPP) in 2012 as part of the Kimberley Science and Conservation Strategy (KSCS) has been summarised in order to define the size and trends of the visitor market to the Kimberley region of Western Australia.

1.1 State of Tourism (KPP, Kimberley Science & Conservation Strategy: Tourism Corridors, 2012)

The overall value of tourism to the Kimberley and more specifically to the Shire of Wyndham East Kimberley (SWEK) region has not been quantified since June 2011 which did not take into account high season peak activity in July/August 2011 or calendar year 2012. It is intended that this will be undertaken as part of the consultation phase of

Region (By Shire)	Accommodation	Core Industry Multiplier
Broome	$73,450,000	$2.52
Fitzroy/Derby	$13,370,080	$1.05
Halls Creek	$6,422,000	$0.58
Kununurra	$33,740,000	$1.98
KIMBERLEY	**$126,982,080**	**$2.10**

Table 1: Regional Core Industry Multiplier

this project. However, the size and a comparative review of where SWEK sits vis a vis the other three (3) Shire regions in the Kimberley is seen as important for context when reviewing external plans and strategies.

At June 2011, the tourism sector was estimated at $393m of the Kimberley's $2b economy, representing 19.65%. Annual visitation to the region was estimated at around 282,400.

The overall tourism multiplier for the Kimberley is estimated at $2.10 which declined from the estimated $2.14 in 2008 (KPP Business Development, 2008); For every dollar spent in accommodation, a further $2.10 is spent on tours, shopping, entertainment and vehicles. The accommodation estimate of $126,982,000 was based on information provided by operators and validated (as far as possible) against ABS Tourism Satellite Accounts. Unfortunately, not all operators provide accommodation data to ABS and therefore, the validation process required some judgment in identifying those accommodation providers that did not submit takings information. In these instances, KPP made direct approaches to accommodation providers and data was confirmed as far as possible.

Regional Variations – Core Industry Multipliers

There are substantial variations in the multipliers by sub-region within the Kimberley. The multiplier for Broome is higher than other regions and it should be noted that both cruising and guided tours have been included in Broome rather than spread across the Kimberley. The Shire of Broome includes the Dampier Peninsula, while Kununurra includes El Questro, coastal camps and Home Valley. The Fitzroy/Derby region includes the Gibb River Road, although part of this is within the Shire of Wyndham-East Kimberley.

The following table outlines the respective multipliers applied to each Shire in the Kimberley region and have been used to calculate the overall value of tourism based on direct spend (Core Tourism Industry).

Tourism Activity	Core Industry Value
Accommodation	$126,982,080
Tours	$98,691,652
Restaurants / cafes / pubs	$81,759,300
Hire Cars/Taxis	$19,850,000
Retail	$65,950,000
Total Value	$393,233,032

Table 2 - Kimberley - Core Industry Values

1.2 Visitor Numbers

It is estimated that around 282,420 individuals visited the Kimberley over 2010/2011. Based on accommodation data supplied by operators for the 2010/11 financial year, estimated visitation by region can be summarised as follows:

Locality	Total
Broome	268,820
Derby	45,580
Fitzroy Crossing	59,880
Halls Creek	48,720
Kununurra	112,330

Table 3 - Regional Visitor Number Estimates (2010/11)

Assumptions

Limited records are kept in terms of "type of visitor", be they corporate or leisure customers.

KPP has developed a series of assumptions to determine the number of individual visitors rather than the aggregate. These assumptions included the following:

1. Visitors travelling to Dampier Peninsula are counted in Broome visitor numbers as it is unlikely that there is not at least one (1) night stopover in Broome even if the Peninsula is the key destination.
2. People who arrive in Kununurra by car are the same people as those travelling to Halls Creek and Fitzroy Crossing and (possibly) to Broome and Derby.
3. 45% of the "visiting friends and relatives" (VFR) group to Broome visit other Kimberley destinations however, they are already counted in the Broome visitor numbers.
4. People arriving by guided land based tour (to Broome) also visit Fitzroy Crossing, Halls Creek and Kununurra.
5. 43% of caravaners arrive in Broome as their sole Kimberley destination. The rest travel on (or back from) Fitzroy Crossing, Halls Creek and Kununurra.
6. Of the total VFR group to Derby, 4.5% remain in Derby for the duration of their stay.
7. Of the total VFR group to Kununurra, 8% do not leave Kununurra.
8. Of the total VFR group to Fitzroy Crossing all travel through Broome and are counted in Broome visitor numbers.
9. 28% of visitors to Broome do not go to any other destination.
10. 100% of people (tourist visitors) to Fitzroy Crossing and Halls Creek have stayed in Kununurra or Broome and are therefore not re-counted.
11. Accommodation data supplied by operators is assumed to also include corporate visitors.

Visitor numbers through the Visitor Centre in Kununurra (KVIC) suggest a similar pattern to door counts in Broome. In terms of door counts, 2010 was the strongest year in both Kununurra and Broome from 2005 onwards; In that year, door counts in Kununurra peaked at 99,599 representing a 1.28% increase over the previous year which compares to a growth at the Broome Visitor Centre of 3.07% for the same period. However, the greatest incremental growth occurred in 2009 which shows a 5.66% increase in Kununurra over the previous year and a 6.93% increase in Broome.

A comparison of note is with the Visitor Information Centre in Darwin where 221,539 visitors were recorded in the year 2011/12 (Tourism Top End, 2013) compared with 91,387 in Kununurra over the same period. As the Tourism Top End (TTE) estimates total visitors at 898,000, visitors to the Top End Visitor Centre represent less than 25% of total visitors. This raises a number of questions that will need to be addressed in latter parts of this project and particularly: *Does TTE do a better job of packaging, product information, marketing etc. so that visitors to the area are clearer of options in advance of their holiday?*

Kununurra Visitor Centre Door Counts 2005-2013

Month	2005	2006	2007	2008	2009	2010	2011	2012	2013
JANUARY	898	1843	1795	1623	1481	1290	1687	1378	1478
FEBRUARY	1203	1279	1681	1787	1751	1785	1891	1352	1948
MARCH	1728	1652	2473	2558	2575	2777	2848	2497	2076
APRIL	2903	3435	4814	5212	6242	6010	5362	3907	6849
MAY	8188	10235	11552	11994	12046	14644	11751	12228	13998
JUNE	15706	11461	18808	16558	16313	17045	16728	17028	
JULY	21001	18475	20716	20281	21963	21774	21366	18686	
AUGUST	16419	14725	16254	14776	15697	15727	15909	14601	
SEPTEMBER	9414	8548	9158	9073	9394	8682	7322	7916	
OCTOBER	5595	5705	5518	5538	5870	5215	4405	3934	
NOVEMBER	2913	3071	2997	2397	3016	2995	2281	2012	
DECEMBER	1482	1611	1478	1267	1990	1615	1714	1450	
Total	87450	82040	97244	93064	98338	99599	93264	86989	

Table 4 - Kununurra Visitor Centre - Door Counts

1.3 Overview of Secondary Research

Twenty six (26) reports relevant to the East Kimberley Tourism Plan Project were reviewed. A full listing can be found as Appendix 1 to this document. Summaries of each report focusing on key issues and priorities are also attached as Appendix 1.

Research and available reports have been categorised by source and theme to develop an overview of current thinking and planning. In the first instance, key reports by source (national, regional or local) were categorised by major themes as follows:

Source	Strategy / Report	Theme
Commonwealth Government	Australia's National Landscapes	Adventure landscapes, Aboriginal culture, wildlife, pearls, diamonds
State Government	Kimberley Science & Conservation Strategy	Conserving environment, Indigenous involvement
	Naturebank	Environmentally sensitive tourist developments
	Landbank	Land release, investment ready sites
	Tourism 2020	Brand, infrastructure, Asia, regional development, Indigenous experiences
	Cruise Shipping 2012-2020	Infrastructure, capacity
Local Government	Plan for the Future 2008-2013	Linkages between key economic activities
	Strategic Community Plan 2012-2022	Support of regional events that attract visitors
Industry	Development Priorities 2010-2015	Aviation gateway, caravan park capacity, Indigenous product, boating facilities
	Savannah Way	Sustainable tourism network. Marketing.
	Caravan & Camping 2013-2018	Release of land for development, public/private/Aboriginal partnerships, infrastructure
	WAITOC Strategic Plan 2012-2015	Aboriginal tourism employment & product development
	Aboriginal Tourism Strategies 2011-2015	Sustainable Aboriginal tourism development and experiences

Table 5 - Report by Source and Key Theme

Analysis showed that themes at Commonwealth, state, local and industry levels are relatively uniform in that the focus is on landscape, conservation and Aboriginal involvement (be that through product development or partnerships) as illustrated below. For the purpose of review, the fly/drive theme has been separated from the camping and caravanning segment, as targets, length of stay, monies spent etc. are substantially different.

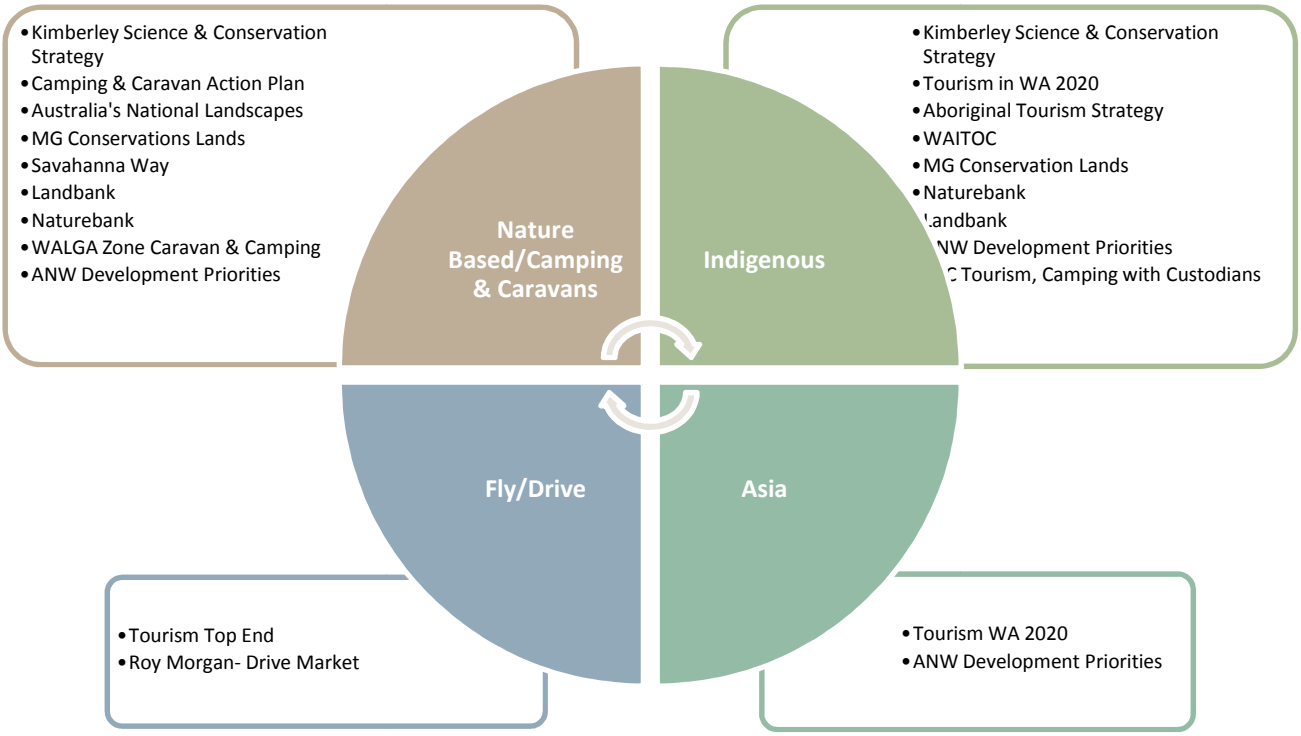


Figure 1 - Key Report Themes

1.4 Review Highlights

For the purpose of this review, highlights from reports assessed focus on those that impact (or could impact) the SWEK region.

1 The Tourism Top End Strategy identifies nature based, adventure experiences, fishing and soft adventures amongst its key targets and identifies mature markets[5] and growth markets[6] for focus.

2 The Drive Market Report prepared by Roy Morgan Research in June 2012 suggests that cheap airfares, petrol costs, changing holiday behaviour and the use of air travel (for the last long trip[7]), the long trip market has only increased by 11% over the past 11 years. The drive only market has been steadily declining whereas the fly/drive market[8] for long trips has increased.

Roy Morgan Research estimate the total Australian Long Trip Drive (only) market at 3.8 million in financial year 2012 with 1.77 million being the Visiting Friends or Relatives (VFR) segment followed by 1.39 million being Families.[9] The report also extrapolated data to show that 25.5% of Grey Nomads[10] and 27.3% of Explorers[11] who visit and NT will also visit Kununurra, however Grey Nomads had the lowest total spend per person per night while the fly/drive segment had the highest per night spend.

3 Western Australian Caravan and Camping Action Plan 2013-2018 identifies prospects to increase camping opportunities in Conservation estates however, only Purnululu is targeted in the

[5] Mature Markets-Australia, UK, North American, Germany and other Europe
[6] Growth Markets- Japan, China, Singapore and Korea
[7] Long trip is defined as 3 or more nights in this report

[8] Fly/drive definition in this report refers to people who fly to a destination and then hire or borrow a vehicle
[9] Families is defined as Australians 14+ who travelled mainly as a family with children on their last long trip and used their own car or4WD, a friend's/ relative's car or 4WD, a hired car or 4WD, motorhome, caravan, campervan and not an aeroplane
[10] In this report, Grey Nomads are defined as retired Australians
[11] In this report, Explorers are defined as Australians 14+ who spent more than 22 nights away

Kimberley. The Plan also looks to create public/private partnerships to improve delivery and maintenance of caravan and camping facilities. Dump points at a Mains Roads WA 24 hour rest area at Cockburn Rest Area have been identified in the Plan. The Report also refers to the Camping with Custodians project that is due for release in September 2013.

4 Tourism Development Priorities 2010-2015 uses the Butler tourism life cycle model to illustrate the development stage of towns/regions within Australia's Northwest. Its assessment shows that Broome is believed to be a developed market nearing a phase of consolidation, whereas the rest of the Kimberley is assessed as in a development phase.

The Plan includes the development of tourist accommodation in national and conservation parks and targets Purnululu and the MG Conservation areas as priorities for investor ready developments. The Plan also looks to increase Caravan Park capacity in and near Kununurra and investigate seasonal, nature based opportunities.

Priorities have also been identified to include new Indigenous product in the East Kimberley, Stage 2 of the Commercial Boat Facility in Kununurra, and upgrades at Wyndham Port.

5 Tourism 2020 looks to increase visitors to regional WA through "the best regional events calendar", improved camping and self-drive experiences, and "extraordinary" regional experiences including nature based, culinary and cruising experiences. This Plan focuses on the desire to provide every visitor with the opportunity to have an Aboriginal experience through the creation of a point of difference to attract international visitors and the integration of Aboriginal tourism product within the wider domestic tourism market.

6 The Naturebank Program identifies six (6) sites in WA of which two (2) are in the Kimberley. Of interest to SWEK is the development of Ngamoowalem Conservation Park, a 70,000 hectare Conservation Park within a one hour drive from Kununurra.

7 The Kimberley Science and Conservation Strategy gives priority to improving the range and amenity of eco-tourism options and promotion of new tourism experiences. The Strategy includes upgrades of camping, picnic, interpretive and other visitor facilities at Mitchell River NP, King Leopold Ranges CP, Purnululu NP, Geikie Gorge CP and Geikie Gorge NP, Windjana Gorge and Tunnel Creek NPs; the development and promotion of tourism corridors across the region; the expansion and promotion of the Kimberley Aerial Highway; and the development and promotion of self-drive journeys through the region, linking and interpreting sites of interest including 4WD expedition trails. This work has been completed and identified opportunities for SWEK from the self-drive market including adventure seekers for off-road experiences and the Kimberley Aerial Highway.

The potential for a Kimberley Icon Walk in the Cockburn Ranges was identified in a consultancy study managed by Tourism WA and undertaken by TRC Tourism. The study is in preparation and still requires consultation with Balangarra Traditional Owners.

The Cockburn Ranges were identified out of an investigation of multiple Kimberley locations. The Ranges are deemed to have the potential to support a fully guided fly-in and fly-out experience referred to as a Kimberley Wilderness Experience, and an independent walk for self-sufficient walkers referred to as a Kimberley trail. For the most part these two products would utilise the same trail.

An Icon Walk in the Cockburn Ranges will require the buy-in of Balangarra Traditional Owners and will be dependent on the outcomes of current land negotiations and land assembly. The affected area is currently part of the El Questro pastoral station.

An Icon Walk in the Cockburn Rangers presents considerable employment and enterprise prospects and if implemented will need to be carefully integrated with management and ranger programs

8 The Miriuwung Gajerrong Conservation Lands reports recommended that Feasibility Assessments be undertaken for those

opportunities determined to have the greatest commercial potential. Priorities for further investigation included: Darram Wetlands and Cultural Centre (to act as a tourism hub for MG conservation lands); Jimilyiwoorr (Spring Creek) site for a Safari Lodge in Ngamoowalem; Skeleton Creek site for high yield safari tents or cabins; Turtle Beach, Cape Domett for an environmental safari lodge; and Yirralalem (Packsaddle Gorge) tented safari cabins at Wawoolam.

The report concludes that although the Indigenous component of the tourism experience will be evident in product delivery, the tourism product identified is essentially an ecotourism experience. The report recommends the targeting of a broader eco-tourism market rather than a narrower cultural tourism market.

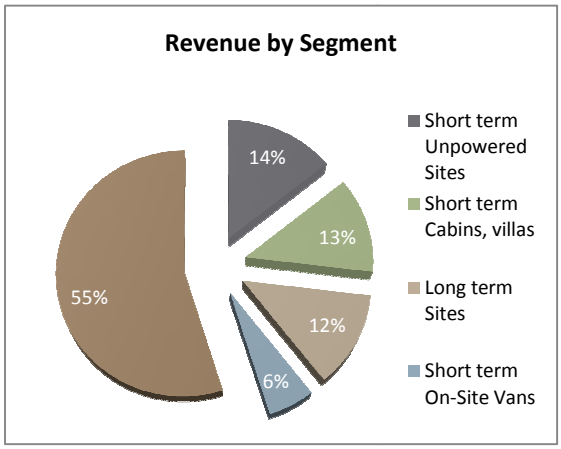


Figure 3: Revenue by Segment within Caravan Parks (IBIS World, 2013)

Based on the key strategies that are to be implemented (externally) for the SWEK region, it is clear that all strategies are about camping, caravanning, nature based and Indigenous experiences. On the basis of these findings, investigation of the caravan and camping sector was included in this section of the report.

Caravan and Camping Sector

Three (3) key reports were used to analysis the Caravan and Camping market trends:

- Caravan & Campervan Data Report (Caravan, RV & Accommodation Industry of Australia Ltd, 2012)
- IBIS World (IBISWorld, 2013)
- Caravan or Camping in Australia (Tourism Research Australia, 2013)

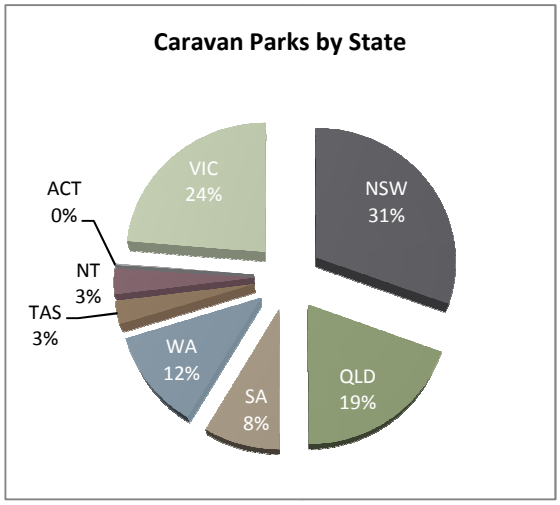


Figure 2: Caravan Parks by State (IBIS World, 2013)

Estimates suggest there are 1,638 caravan parks (with 40+ powered sites) in Australia (Department of Energy Tourism and Resources and Tourism Australia, 2011). By far, the greatest number is in NSW with around 30.6% of all Australian Caravan Parks (IBISWorld, 2013). It is estimated that around 65 (or 3.9%) of Caravan Parks closed in the five (5) years to June 2012.

Caravan and Camping facilities offer a diverse range of accommodation to suit a broad visitor base. For this reason, revenue growth was relatively strong following the GFC as more holiday makers looked for cheaper types of accommodation.

Market revenue was estimated at $1.4 billion in financial year 2012 (IBIS World, 2013). Segmentation of the market by product shows that around 55% of revenue is derived from short term powered sites whereas around 12% house permanent/long terms residents.

According to IBIS World (2013), the industry is in the mature phase of its life cycle and it is forecast that number of establishments, as well as total site capacity, will continue to decline. However, many

caravan parks and camping grounds have moved to providing higher quality on-site facilities such as cabins and villas to overcome the seasonality of their accommodation. Therefore, the net effect of lower capacity is weighed against improving occupancy. Industry gross product is therefore expected to grow at 1.9% annually to 2017/18 against national GDP of 2.4% over the same period (IBIS World, 2013).

Caravan parks and camping grounds are concentrated on the eastern seaboard in line with population. Tourism Australia indicates the top 3 camping regions in Australia as the north and south coast of NSW and the Gold Coast. As the majority of domestic visitors come from intrastate, the relatively low number of nights spent in WA caravan parks and camping grounds can be explained as the driving distance to WA from the eastern states and within the state make is unfeasible for short breaks.

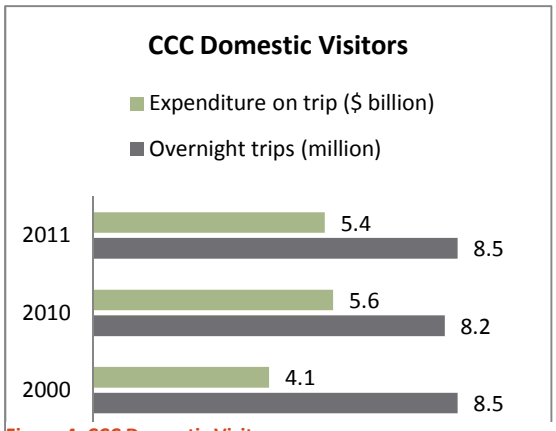


Figure 4: CCC Domestic Visitors

The caravan parks and camping grounds industry is sensitive to factors that influence travel both domestically and internationally (IBISWorld, 2013). IBIS World has determined the key drivers of this industry as:

- Disposable income
- Consumer sentiment index
- Domestic tourism
- Competition from hotels and motels
- International travel to Australia

Domestic tourism has been soft since the GFC due to lower consumer sentiment, economic uncertainty and the high Australian dollar. However, holidays to caravan parks and camp

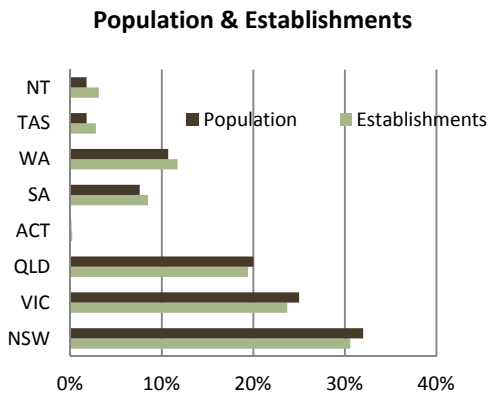


Figure 5: State Population and Caravan Parks

grounds represent a relatively cheap holiday and the industry benefits when consumers budget less for holidays. Countering this industry opportunity, cheap international flights and accommodation deals means going on an overseas holiday can be cheaper than holidaying in Australia. Based on ABS data, overseas departures from Australia have doubled in the ten years to June 2012. On the positive side, the largest markets for caravan and camping holidays are Grey Nomads and Families; both groups less likely to substitute domestic for international holidays. Grey Nomads prefer to take longer trips in their own vehicles or vans and are generally less attracted to short term holidays. For families, the cost of airfares for a typical family can be a deterrent. These trends are confirmed in the 2012 Caravan and Camping Snapshot (Department of Energy Tourism and Resources and Tourism Australia, 2011).

The accompanying chart shows there has been little change in the number of domestic overnight trips taken in 2011 when compared with 2000 (although it should be noted that there have been significant fluctuations over this time). Overnight trips increased in 2011 over 2010 by 3.7% however, expenditure decreased by 3.5%.

The TRA research reports that overnight stays by the CCC segment represent 10% of all visitor nights in Australia.

Examination of the international visitor market shows a sharp decline in overnight trips of 10% in 2011 over 2010 and a decrease of 10.6% in expenditure.

Summary of Reports Reviewed

Tourism Top End Strategic Plan 2013 – 2015 (Tourism Top End, 2013)

In F12, TTE had 221,539 visitors through the Darwin VIC, an increase of 20% on previous year. This represents 25% of all visitors to the Top End (898,000).

Main targets have been identified as:

- Nature based and adventure experiences
- Fishing and soft adventure
- Cruise and conference market
- Major events particularly in shoulder and wet seasons
- Defence force, mining and construction sector

The Territory's total Defence population (incl. families) is around 15,000. An additional 2,500 US personnel is expected in the next 5 years. This segment offers great VFR opportunities.

Key markets have been identified as:

- Category 1 – Mature Markets (Australia, UK, North American, Germany and other Europe)
- Category 2 – Growth Markets Towards 2020 (Japan, China, Singapore and Korea)
- Category 3 – Italy, France, Malaysia, Indonesia and rest of World.

Potential value 2020;

- Cateogry 1 - $1.6b
- Category 2 – $84m

Primary Strategies

- Support growth of sustainable aviation services
- Make the NT a more competitive destination for cruise and marine tourism
- Guide development and upgrades of infrastructure for drive and fly/drive markets
- Improve rail experiences.

Emerging Trends

- Day trips to the Top End accounts for 55% which has increased by 23% over the past 5 years compared with total visitation which has declined by 1% per annum since 2007.
- Over 80% if overnight visitors are from the domestic market. They spend an average of 7.8 nights in the region spending an average of $1,048 per visitor.
- International visitors (144,000) decreased by 6% over the last 5 years and a decrease of 3% over the last year wheras oversears visitors to Australia increased on 5% over the last 5 years.

Yield

- Highest daily yield is business events ($495 per night compared with $212 in NT)
- Top End got 90,000 convention visitors which is by far the largest market. Comparison: Townsville (19,000 convention visitors); Mackay (69000); Hunter Region (59,000); Geelong (38,000) and Tropical North Qld (81,000)

Kununurra Caravan Park Pre Feasibility Study (Brighthouse, 2009)

Part of Landbank "Investment Ready" strategy, this study specifically looked at the viability of Lot 2484 Victoria Highway. At time of this report, there were five (5) caravan parks within Kununurra and one (1) at Lake Argyle (70ksm from Kununurra). The Agricultural Society Oval is used for overflow.

The report suggested that the average number of visitors staying in caravan parks in the three (3) years to 2008 is 166k per year, which represents 38% of all visitors.

This report assessed three (3) options of which it proved 2 to be viable.

- Option 1 – stand-alone tourist caravan park with 10% of sites allocated to cabin accommodation
- Option 2 – construction of Ord Expansion Project used to improve occupancy by introducing high-density, self-contained accommodation units for contractors for 1 – 6 months. Upon project completion, accommodation would be removed and sites revert to tourist caravan park
- Option 3 – Residential park home section with caravan park development.

Option 2 and 3 were proved viable and was subsequently developed as the Workers Camp for Ord River expansion project.

The report is out-dated in terms of data, particularly as the past 4 years have shown changes in previous trends and therefore does not provide a baseline for future planning.

Western Australian Caravan and Camping Action Plan 2013-2018

(Tourism WA, 2013)

This Action Plan includes:

- Key infrastructure such as new caravan/camping grounds in protected areas, overflow park policy amenities, additional rest areas and black waste dump points along major travel corridors;
- Land assembly and incentives to offer 'investor-ready' opportunities for commercial caravan park development in priority areas;
- The implementation of dedicated marketing activities, training programs and accreditation to lift industry standards; and
- Investigation and development of camping facility opportunities on Indigenous lands with the aim of encouraging Indigenous participation in the delivery of these facilities

The report identified 11 key recommendations and implementation plans:

1. Streamline caravan park and campground regulations to improve supply and meet market demand (applying minimum requirements and standards on facilities to meet the health and safety needs of tourists, allowing market forces to dictate other facility and amenity requirements; the potential for co-location of small scale facilities with other businesses (e.g. wineries, sports clubs, pastoral stations)
2. Increase support for the release of land for more caravan park developments where viable. (Identify suitable sites (in areas of high priority) for the development of new caravan parks and undertake land assembly processes for the release of sites under the Landbank initiative)
3. Identify opportunities to increase caravan and camping opportunities for visitors within Western Australia's conservation estate. (Only I site identified in the Kimberley -Purnululu NP, Kimberley – Kurrajong & Walardi)
4. Create public-private partnerships to improve delivery and maintenance of caravan and camping facilities (2 sites identified within the Kimberley at - Cockburn Rest Area Spring Creek Rest Area)[12]
5. Partner with Indigenous Australians to develop caravan and camping infrastructure on Indigenous land (Camping with Custodians project underway)
6. Western Australian Planning Commission to provide better guidelines for the development of caravan parks to Development Assessment Panels and local governments (Review planning policy impacting on caravan and camping with the view to improve investment into the sector. 13/14.
7. Develop a State-wide overflow policy that works for visitors and supports industry
8. Raise the bar on skills for the caravan and camping sector (customised training for the caravan industry to encourage enhanced delivery of product and services.)
9. Improve data to support decision making
10. Develop a marketing strategy to improve perceptions and online presence of the caravan and camping sector
11. Secure sustainable regional tourism benefits from the resources sector (Design and construct workers camps to enable effective conversion into tourist caravan parks once they are no longer required by the resources industry)

Site	Name	Infrastructure	Proposed works
1	Drysdale River Station	Dump Point	Installation
2	The Gibb River Road	Dump Point	Installation
3	Cockburn Rest Area	Main Roads 24hr Rest Area	Full upgrade of facilities
4	Imintji	Camp with Custodians	30-40 campsites
5	Violet Valley	Camp with Custodians	25-40 campsites
6	Mimbi Caves	Camp with Custodians	30-40 campsites
7	Sanctuary Road Caravan Park	New Caravan Park Development	Request for Proposal Stage

Our Direction in China 2012-2015

(Tourism WA, 2012)

Chinese visitors arriving in 2011 represented 18,900 spending $102m. WA 2020 plan targets 100,000 by 2020, spending $500m.

Five strategies have been identified to achieve 2020 goals:

1. Aviation Development – Development of direct and incirect services into and within WA.
2. Consumer Marketing – Confirming brand proposition and identifying appropriate marketing channels
3. Industry Development – Ensuring WA industry is prepared for the increase in Chinese visitors
4. Trade Development – Engaging WA's trade partners to educate and gain support
5. Strategic partnerships – Leveraging the activities of existing products and business in market and aligning acitivities

Priority Destinations have been identified as Perth and the South West while Australia's Northwest is at the bottom of the priority list with core messages identifed as: Australia's outback in comfort and luxury; excellent weather; accessibility. Hero experiences have been identified as Broome, Chinese history, resorts, soft adventure, diamonds and pearls, World Heritage and staircase to the moon.

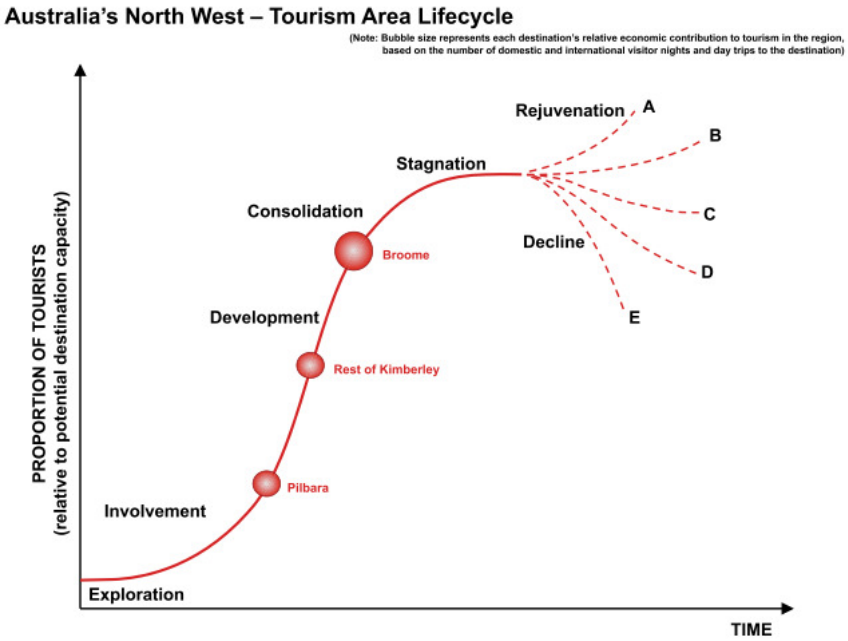
Global	Australia	Western Australia
70m Chinese travelled abroad, each spending on average US$3,000	Chinese visitors to Australia spent $2.7b	WA received 18,900 Chinese visitors who spent $102m, an increase of 27.5% over the previous year
	Between now and 2020, average annual growth in arrivals of 7.8% is forecast with arrivals to increase to 958,000 while tourism exports are expected to double to $6.3b	

Tourism Development Priorities 2010-2015

(Tourism WA, 2009)

Tourism in WA provides over 82,000 jobs and contributes over $7.3b (directly and indirectly) to the WA economy.

As a result of the fragmented, remote and seasonal nature of the tourism industry, government recognises that it has a significant role in destination development specifically inc reating a favourable environment for tourism development through infrastructure investment that supports development.



Annual Average Holiday / Leisure Overnight Visitors 2001 - 2008

The report used the Butler tourism life cycle model to illustrate the development stage of towns/regions within Australia's Northwest. As shown in the following diagram, Broome is believed to be a developed market nearing a phase of consolidation, whereas the rest of the Kimberley is seen to be in a development phase.

The report identified 11 key priorities:

1 **Establish the Kimberley as a key aviation gateway** – Securing international air services from South East Asia to Broome; the relocation of the Broome Airport and upgrading the airport at Kununurra. (*Completed*). High priority was also given to securing a Brisbance-Broome air service, (*completed*) additional air services from Alice Springs and Perth into Kununurra and upgrading of Dampier Peninsular and Mitchell Falls airstrips. (*Costed*).

2 **Facilitate the development of accommodation in national and conservation parks and on pastoral stations** – Purululu investor ready development; investor ready tourism accommodation in MG conservation area, Windjana Gorge National Park, King Leopold Range Conservation park and Mitchell River National Park.

3 **Preserve and maintain the Gibb River Road** – Maintain as an off-road, wilderness frontier for tourism drive adventure.

4 **Increase Caravan Park capacity across the Kimberley region** – Release of caravan specific Langank site in Kununurra; investigate opportunities for seasonal nature based caravan parks near Broome and Kununurra; release of caravan park lease in Cable Beach area; development of high end accommodation in Broome; and development of accommodation (short term) along Great Northern Highway.

LGA	Intrastate	Interstate	International	Total
Shire of Broome	60,000	66,600	35,200	161,800
Shire of Wyndham East Kimberley	15,300	39,400	19,800	74,500
Shire of Derby West Kimberley	13,600	26,800	12,700	53,100
Shire of Halls Creek	11,000	20,000	12,900	43,900
Kimberley Total	99,900	152,800	80,600	333,300

5 **Improve the reliability and safety of access to key natural attractions accessible via the Great Northern Highway** – Upgrading of Fairfiled-Leopold, Tanami, Kalumburu and Carranjia Roads; sealing of Cape Leveque Road.

6 **Facilitate the development of indigenous product and interpretation in the region** – paritcularly in West Kimberley to international standard; new indigenous product in central and East Kimberley.

7 **Improve and expand visitor amenities along major touring routes** – Ammenities along Gibb River Road and dump facilities in all major towns in the region.

8 **Improving boating facilities in the Kimberley Region** – Safe boat harbour in Broome; commerical boat facility in Kununurra; Wyndham Port upgrade.

9 **Facilitiate the development of convention/conference facilities in the region**- Broome focus.

10 **Ensure tourism related development is incorporated in the rejuvenation of precints and townships** – Old Broome, Cable Beach and Kununurra focus.

11 **Seal coastal access roads around Broome** – Crab Creek, Manari, Kavite and Willie Creek Roads.

Strategy for Tourism in Western Australia 2020 (Tourism WA)

Tourism WA's goal is to double the value of tourism in Western Australia from $6 billion in 2010 to $12 billion by 2020. The State Government Strategy for Tourism in Western Australia 2020 outlines how that goal can be achieved and sets the direction for WA's tourism industry over the next decade.

The document outlines a phased approach. Through to 2014, the Government and the tourism industry will work together to set the foundation to enable the required growth to occur from 2015, culminating in 2020.

Seven priorities have been identified to achieve 2020 outcomes. (Details are provided where they directly impact the Kimberley region)

1. Brand – Firmly establish the Experience Extraordinary brand
2. Infrastructure – Expand hotel, aviation and workforce infrastructure to support the growth
   i. Broome and SW airport and route expansion
   ii. Establishing new (air) routes
   iii. Desination management
   iv. Tourism precints
3. Business Travel – Increase the contribution and leverage of business travel to WA
4. Asian Markets – Grow WA's share of high-yeild Asian markets
5. Events – Position WA as a recognised events destination for locals and visitors
6. Regional Travel – Increase visitors to regional WA
   i. Tourism support infrastructure in regional WA
   ii. Australia's best regional events calendar
   iii. Improved camping and self-drive experiences
   iv. Extraordinary regional experiences including nature based, culinary and cruise shipping experiences
7. Indigenous – Provide every visitor with the opportunity to have an Aboriginal tourism experience.
   i. Creation of a compelling point of difference for Aboriginal tourism to attract international visitors and the integration of Aboriginal tourism product within wider domestic toursim, further reinforcing the Experience Extraordinary brand
   ii. Facilitation and support opportunities for access to land and tenure for the development of tourism
   iii. Supporting industry in interfacing with government and maximising involvement in government tourism programs

iv. Opprotunities and pathways for Aboriginal employment in tourism, including traineeships and cadetships.

Making a Difference: Aboriginal Tourism Strategy for Western Australia 2011-2015 (Tourism WA, 2010)

The strategy is based on providing opportunities for the continued development of Aboriginal tourism and position it as an iconic experience in Western Australia.

This stragegy builds on the 2006-2010 plan - *Listening, Looking, Learning: An Aboriginal Tourism Strategy for Western Australia.* The vision for that strategy was:

Western Australia would be the premier destination for autheentic Aboriginal tourism experiences.

In 2006, there were 65 Aboriginal organisations operating a toursim business. In 2008/09, 44 of these were still op[erating and the total had increased to 109 of which 14 were export ready, 41 market ready and 54 emerging. In 2010/11 there were 113 Aboriginal tourism businesses of which 18 were export ready, 41 market ready and 54 emerging.

While the GFC has affected tourism development,, Aboriginal tourism experiences are still highly sought after with 66% of overall visitors and 83% of international visitors seeking to participate in these activities. [13]

2011-2015 Vision:

Quality Aboriginal tourism experiences provide unique Western Australian experiences.

Goals

1. Provide pathways and opportunities for the sustainable development of Aboriginal tourism experiences
2. Enable Aboriginal tourism businesses and the wider tourism industry to work collectively, bringing culture and commerce together in a manner that leverages and adds value to each other
3. Position the Aboriginal tourisnm industry as a sustainable iconic tourism experience

There are 4 strategies to achieve these goals:

1. Positioning and Marketing – Ensure Aboriginal tourism provides a competetive advantage and encourages international visitors to come to WA
2. Industry and Government parnternships – Provide efficient and effective government and insustry support for Aboriginal tourism
3. Quality Product – Ensure the development of authentic, consistewnt and sustainable Aboriginal tourism products
4. Industry Capacity – Strenthen the level of skills and training within the Aboriginal tourism industry

Implementation of thses strategies has largely been left to Tourism WA, the Small Business Development Corporation (SMDC), the Western Australian Indigenous Tourism Operators Council (WAITOC), and the Department of Training and Workforce Development (DTWD).

WA Cruise Shipping Strategic Plan 2012-2020 (Western Australia Cruise Shipping Strategic Plan, 2012)

The WA cruise shipping industry recorded 102 cruise ship visits in 2011/12 which was an increase of 68 visits over the previous year. These visits generated $185.7m in expenditure.

The global cruise industry carried 18.8m passengers in 2010 which increased to 20.23m in 2011. Estimates suggest 23.49m by 2015. Repeat cruisers make up half of all passengers and these passengers are continually looking for new destinations.

[13] Tourism WA (2010) Visitor Experiences & Expectations – Research 2009/2010

The Australian cruise industry is forecast to reach 1m passengers by 2020, representing a 5% annual growth rate. The most significant region within WA is Port of Fremantle which generated approximately $160.6m in F12. Broome recorded $6.5m in the same year.

Four key business priorities have been identified to reach 2020 targets.

1. Destination awareness and marketing
2. Port Infrastructure and policy (identify priority gaps and implement activities to increase capacity for growth)
3. Strengthening industry capacity
4. Landside destination development (shore excursion options)

WA destinations have been categorised into tiers to reflect their current status and projected future status based on their ability to impact on growth of the sector. The forward vision is that by 2020 WA will offer 2 turnaround ports (Fremantle and Broome) and 7 well established transit ports. (None of these 7 is in the Kimberley).

Four strategic goals have been identified to meet target growth:

1. Position and market WA as a world class cruise destination (Destination Marketing)
2. Enhance WA's individual cruise destinations (Landside destination development)
3. Provide efficient and safe port facilities and services that meet the needs of the cruise sector (Port infrastructure and policy)
4. Build and foster industry partnerships (Strengthen industry capacity and ownership)

Landbank Program (Tourism WA)

Landbank identifies crown land in city and regional WA for tourism accommodation development. Tourism Western Australia's (Tourism WA) Landbank initiative helps to ensure that there is an adequate supply of tourism development sites to meet the future needs of the tourism industry in Western Australia. The aim of the Landbank initiative is to make identified tourism sites 'investor ready' by facilitating the approvals processes required for tourism development to occur.

Tourism WA works with a range of different government agencies, local government authorities and developers to;

- identify potential tourism development sites across the State, especially Crown Land
- accelerate the release of investor ready land in strategic locations
- remove upfront uncertainty and reduce the time it takes for developers to commence construction on tourism zoned sites
- safeguard the environment by ensuring any developments are in keeping with the location's environmental values and ensure relevant environmental approvals are gained

Feasibility studies, environmental analyses, planning and consultation are conducted before a site is released for development. Due statutory processes are followed before a development proposal is approved.

The last Landbank Program was released in 2008 which identified 25 sites.

- **Sites in the pipeline** (1-2 years). These sites were already undergoing planning clearances and subject to pre-feasibility assessment. In the Kimberley, this included full service style accommodation in Derby and Caravan park/budget accommodation in Kununurra and Broome.
- **Sites in planning** stage (2+years). These sites were identified as having potential for release but needed to progress through due diligence. This category included full service hotels and caravan parks/budget accommodation in Broome and Kununurra.

- **Ecotourism** (Naturebank Sites). Sites identified within WA's protected areas and typically managed by DPAW. The only Kimberley site identified was Purnululu.

Naturebank Program (Naturebank, 2011)

Naturebank is a WA government initiative that aims to prepare sites for development of quality environmentally sensitive tourist accommodation in the State's national parks. Naturebank works to identify sites in selected national parks and undertakes the pre-release development clearances required to present them to market for development.

Naturebank is jointly managed Tourism WA (TWA) and the Department of Parks & Wildlife (DPAW). TWA is responsible for the development, promotion and protection of tourism experiences while DPAW has responsibility for management of national parks, marine parks, conservation parks and state forests.

The 2011 Program identified 6 sites in WA of which one is in the East Kimberley:

1. Ngamoowalem Conservation Park. Located in the East Kimberley, this 70,000ha conservation park is within an hour drive of Kununurra.

Savannah Way (Savannah Way)

The Savannah Way is Australia's Adventure Drive, linking Cairns in Tropical North Queensland with the historic pearling town of Broome in Western Australia's Kimberley, via the natural wonders of Australia's tropical savannahs and the Northern Territory's Top End.

The 3700 kilometre route links 15 National Parks and five World Heritage areas. You can explore just a section or cross the continent enjoying its wide horizons, ancient gorges and abundant wildlife, connecting with Aboriginal and pioneer heritage in today's friendly outback.

Savannah Way Limited is a non-profit company formed to market quality visitor experiences along the drive route for the economic and social well-being of communities in the region.

The organisation works to assist small businesses and communities along the route through sustainable tourism and network support including tourism promotion, road signage, brochure and merchandise distribution, agent and media contact. Savannah Way Limited also links stakeholders with the market (and each other), as well as assisting regional development through research, projects, training and consultation. The promotion of the drive route is undertaken in co-ordination with our partners and members, including:

- Tourism and service businesses
- State, Regional and Local tourism organisations
- Local, State and Territory Government agencies
- Community, Environment and Development organisations

Australia's National Landscapes: The Kimberley (Tourism Australia, 2012)

Australia's National Landscapes program is a unique tourism and conservation partnership managed by Tourism Australia and Parks Australia. The program provides a framework to consider tourism infrastructure, conservation and marketing in a united way, encouraging collaboration and partnerships. It brings together the tourism industry and conservation sectors to improve environmental, social and economic outcomes for each landscape. The program aims to:

- Promote Australia's world class visitor experiences
- Enhance the value of tourism to regional economies
- Increase the role of protected areas in those economies

- Build support for protecting our natural and cultural assets

Australia's National Landscapes Program was launched in December 2006 with the announcement of Australia's Red Centre as the first National Landscape. In June 2008, seven subsequent landscapes were named at the Australian Tourism Exchange (ATE). Since then, another eight Landscapes have joined the Program, completing the collection of 16.

Four (4) reasons to visit the Kimberley have been promoted under this programme.

1. Awe-inspiring adventure landscapes

   All manner of adventure is possible against the Kimberley's ancient landscapes. Ride a camel along Broome's Cable Beach. Then 4WD the Gibb River Road to Kununurra, where you can boat across mighty waterways such as Lake Argyle and the Ord River. Fly over the magnificent waterfalls of the Mitchell Plateau or the Bungle Bungle Ranges in World Heritage-listed Purnululu National Park. Snorkel and dive in Rowley Shoals Marine Park, just one of the spectacular underwater sites along the remote, pristine Kimberley coastline. For a gentler adventure, cruise in luxury through the Buccaneer Archipelago, home to the Horizontal Waterfalls and 1,000 islands.

2. Rich Aboriginal experiences

   There are countless ways to connect to the Kimberley's rich, living Aboriginal culture. Stay in a traditional Aboriginal community on the Dampier Peninsula, and kayak, snorkel, mud-crab and fish with local guides. In the outback, spend time on an Aboriginal-owned station, where you can taste bush tucker, learn to muster cattle and listen to Dreamtime lore. Explore significant sites such as Geikie Gorge and King George Falls with traditional owners. See ancient rock art in Drysdale National Park or on the isolated Mitchell Plateau, home to the Gwion Gwion paintings. You can check out the Kimberley's acclaimed contemporary Aboriginal artists in galleries and centres in Broome, Derby and Kununurra.

3. Abundant wildlife

   Birds, animals, marine life and prehistoric reptiles reign in the Kimberley. See them on an off-road adventure or join a tour to sanctuaries and breeding spots. Float along the Ord River past salt-water crocodiles, rock wallabies and hundreds of species of birds. Spot crocodiles sunning themselves around Windjana Gorge and Tunnel Creek. Visit Broome's Roebuck Bay, a haven for native birdlife and stopover point for migratory birds between September and April. Another birdwatcher's paradise is Parry Lagoon Nature reserve and Marlgu Billabong, near Wyndham.

4. Diamonds, pearls and eco-retreats

   Nothing says prestige and romance like diamonds and pearls, both produced in the epic Kimberley. Shop for South Sea pearls in Broome and trace the town's rich pearling history in Chinatown and the Japanese Cemetery. Tour the vast Argyle Diamond Mine, near Kununurra, where most of the world's rare pink diamonds are extracted. The Kimberley is also the place to get back to nature in eco-luxury. Go glamping along the Dampier Peninsula or detour off the Gibb River Road to stay in deluxe eco-cabins.

Kimberley Science & Conservation Strategy (Department of Environment and Conservation, 2010)

A State government initiative, the strategy recognises that the Kimberley is at a critical point in its development potential, including offshore oil and gas, the expansion of the Ord Irrigation Scheme and an expanding population (both visitors and residents). The strategy recognises this

growth and has established plans to conserve the region's natural and cultural values.

The cornerstone of the plan is the creation of the Kimberley Wilderness Parks which includes the State's largest interconnected system of marine and terrestrial parks covering more than 3.5m hectares.

Under this strategy, the State has committed an initial investment of $9.6m in nature-based tourism in the region. A total of $63m has been committed to 2015.

The strategy has four major themes:

1. Conserving the Kimberley's unique natural environment
2. Employing and involving local aboriginal people and maintaining the Kimberley's rich culture
3. Increasing knowledge to support informed decision making, planning and management
4. Providing opportunities for people to experience the Kimberley's natural and cultural wonders

The fourth theme is the most pertinent to SWEK in the development of a tourism strategy, as this talks about improving the range and amenity of eco-tourism options and promotion of new tourism experiences. This strategy will be delivered through:

- Upgrades of camping, picnic, interpretive and other visitor facilities at Mitchell River NP, King Leopold Ranges CP, Purnululu NP, Geikie Gorge CP and Geikie Gorge NP, Windjana Gorge and Tunnel Creek NPs.
- Facilitate quality environmentally and culturally sensitive accommodation through the Naturebank program at Purnululu and Windjana Gorge through public-private partnerships
- Develop and promote tourism corridors across the region
- Expand and promote the Aerial Highway concept
- Develop and promote self-drive journeys through the region, linking and interpreting sites of interest including 4WD expedition trails
- Promote the values of Kimberley marine parks through an education and accreditation program with registered tour operators.

Kimberley Science & Conservation Strategy; Tourism Corridors (KPP, Kimberley Science & Conservation Strategy: Tourism Corridors, 2012)

Tourism WA (TWA) in partnership with the Departments of Parks & Wildlife (DPAW) and Regional Development and Lands (RDL), is responsible for the implementation tourism initiatives of the State Government's Kimberley Science and Conservation Strategy (KSCS). The Strategy focuses on initiatives to conserve the physical character of the Kimberley, create training and employment opportunities for Aboriginal people and to promote social and economic development in the region with particular emphasis on expanding the range of eco-tourism opportunities.

Part of this strategy relates to the development and promotion of *tourism corridors*. The corridors identified are:

1. The West Kimberley Circuit, taking in Windjana Gorge, Tunnel Creek and Geikie Gorge;
2. The Gibb River Road; and
3. The Great Northern Highway.

As an indication of the importance of the road corridors to Kimberley tourism, an estimated 105,000 tourist vehicles travelled sections of the Great Northern Highway corridor in 2011, with an additional 20,277 travelling the entire length of Gibb River Road corridor.

The report details stakeholder consultations which highlighted a number of barriers to future development of the corridors, and these included:

- the lack of quality data available to make sound strategic tourism investment decisions;
- the issues and timeframes associated with exclusion and excision processes occurring on pastoral land or gaining approvals for tourism on pastoral and Indigenous community land;
- the responsibility for ongoing maintenance of tourism assets and the difficulty Shires have in taking on this burden from such a low ratepayer base; and finally
- the need to balance the expectation of free camping sites (such as Mary Pool near Halls Creek) with the need to manage the environment at these locations and to maximise economic benefits associated with tourism along the corridors.

A number of broad strategic recommendations were developed as a result of visitor surveys, Delphi panel consultation, stakeholder consultation and field assessments undertaken during this project. These recommendations include:

1. **Focus on "Zones of Opportunity" within the corridors that show maximum potential to increase visitor numbers and/or experience.**

   Based on the sheer scale of the region, the complexity of access, tenure, Indigenous interests, Government and other stakeholder interests, and the practicality of implementing upgrades over such vast tracts of land with such complexities it is recommended that TWA approach future development of tourism infrastructure and tourism product on the Corridors based on priority areas or 'zones of opportunity'; These zones have been recommended on the basis of common features, common points of interest and connectivity. In this report, the on-ground assessment of amenities, activities, attractions, accessibility and accommodation along each of the corridors resulted in the distinction of nine (9) zones across the three tourism corridors. These zones included:

   - Zone 1 – featuring the Windjana/Tunnel Creek attractions.
   - Zone 2 –the King Leopold Ranges to Imintji Community on the Gibb River Road
   - Zone 3 –the 'central' Gibb River Road gorges and Aboriginal communities of Kupungarri and Ngallagunda.
   - Zone 4 – the northern Kimberley toward Mitchell Plateau and Kalumburu.
   - Zone 5 – the eastern end of the Gibb River Road featuring the Cockburn Ranges, El Questro and Home Valley pastoral stations.
   - Zone 6 – featuring the towns of Wyndham and Kununurra, and north eastern end of the Great Northern Highway.
   - Zone 7 – from Doon Doon to Halls Creek, including Purnululu.
   - Zone 8- Halls Creek through to Fitzroy Crossing, including Mary Pool, Mimbi Caves, and Geikie Gorge.
   - Zone 9- Great Northern Highway from Fitzroy Crossing to Derby and Broome.

   It is not intended that marketing be structured around the 'zones' concept; however, some zones may be appropriately themed (e.g. Zone 1 could become the "Bunuba Resistance Trail") based on Indigenous or European heritage, stories, or landscape features. Selecting an appropriate theme would require significant consultation with relevant stakeholders.

2. **Improve online information resources through developing and resourcing a single Web-Portal, Portable Device Application and building an online presence.**

   Stakeholders and visitor information clearly defined the need for better online information to assist visitors in planning their trip, and in effect build accurate expectations

about their planned journey, leading to better experiences. It is therefore recommended that TWA pursue the development and resourcing of a single Kimberley web portal (with associated Application for downloading onto a portable device) that maintains up to date information about road access, accommodation providers, activities, stories and histories, environmental and conservation aspects, appropriate behaviours and links to booking sites. This web portal and App development offers the following benefits:

- Improved ability for the self-drive market to plan and book and commit to a holiday along the corridors.
- Improved economic benefits from increased visitation from tourism accommodation providers.
- Improved information available to tourists about conservation and the local environment, and Indigenous culture and appropriate behaviours on-route to protect these aspects.
- Improved safety for visitors due to information about road conditions, local weather, vehicle standards, emergency planning and communications.

The increased web presence of the Kimberley corridors and the resourcing of the project with a full time communications officer could result in the management of an online presence through social media to target younger market segments into the future.

3. **Improve information collection and application to improve tourism and conservation decision making.**

A number of gaps in collection and quality of information relating to tourism in the Kimberley region has become evident through this study, and confirmed by stakeholders as part of this project. In order to improve the planning and decision making with regard to the Kimberley's tourism assets and the importance of tourism to the Kimberley's economy, it is recommended that an audit of Kimberley tourism data information sources and collection methods is undertaken. This will enable gap analysis to be completed that will help to identify areas where data quality and collection can be improved, and possibly establish an opportunity for a fee for service data provider to manage and share this data with key agencies with the ultimate purpose of improved decision making.

In addition to the broad strategic recommendations, a detailed field assessment of infrastructure along the corridors was conducted in June 2012 and was based on the '5As' product evaluation tool, with attractions, amenities, accommodation, access and activities all reviewed and scored against suitability for the four market segments used by Tourism WA (Aspirational Achievers, Dedicated Discoverers, Grey Explorers and Family Connectors). An assessment was also made of market appeal and market opportunities, giving an indication of market potential of the corridors. After investigating 43 sub-sections of the corridors, this data was rolled into the nine distinct tourism zones mentioned previously. Three of the nine "zones of opportunity" showed immediate market potential and they were prioritized for upgrades. The zones of interest and the recommendations for upgrades include:

- **Zone 1:** the Windjana/Tunnel Creek circuit – upgrades recommended in this report include:
  - improved interpretive signage developed around the Bunuba Resistance (Jandamarra) history;
  - upgrade to Lillimooloora ruins site and signage;
  - development of tourism product such as Indigenous operated tours and support for a "Light and Sound" production that is being proposed by Bunuba people;
  - Improvement to the Fairfield-Leopold Road to increase visitation off the Great Northern Highway (however, the carrying capacity of Tunnel Creek and Windjana Gorge should be determined prior to this occurring); and

- the development of a mid to high-end semi-permanent camp at Windjana Gorge (aligning to existing Naturebank initiatives).

- **Zone 3:** Development of the central Gibb River Road gorges, with a central hub of tourism activity at Mt Barnett – upgrades and recommendations include:
  - Gorges such as Adcock, Galvins and Manning Gorges that will be excluded from the Pastoral stations in 2015 and proposed to be jointly managed between DPaW and the Traditional Owners;
  - Supporting an improved standard of accommodation across the zone through promoting Indigenous partnerships with private operators on Indigenous lands;
  - Targeted support for Indigenous capacity building in tourism management in this zone from a range of providers and programs including RJCP Providers, IBA, TWA's Indigenous programs, DPAW Rangers groups and other conservation and tourism training programs.

- **Zone 7:** The focus should be on building Indigenous tour product to increase visitation and visitor spend, give visitors a cultural experience, and to promote this area as the "Art Heart of the Kimberley":
  - Focus on collaboration and promotion of existing Aboriginal Art galleries in the area from Doon Doon to Halls Creek, which is already known for quality desert art. Develop strategic plans and resource coordinated events and marketing for the region.
  - Development of a high end accommodation facility at Purnululu National Park to target the needs of more affluent tourists currently only undertaking scenic flights to the destination.

In addition to these regional upgrade priorities, a small number of urgent 'local site upgrades' were identified through the field assessment process. These included upgrades to information boards at each end of the Gibb River Road, upgrading March Fly Glen picnic area along the Gibb River Road, replacing information boards on the Great Northern Highway intersection near Derby, and assisting with signage for Mimbi Caves along the Great Northern Highway.

Kimberley Science & Conservation Strategy – 4WD Expedition Tracks

(KPP Business Development, 2012)

This report relates to the 4WD Expedition Routes initiative identified as part of the Kimberley Science & Conservation Strategy. The 4WD expedition routes identified under this strategy were the Parry Creek Road / Kurunjie Track and the Carson River Track.

The assessment process was based on a review of available research, market trends and demand; Delphi and Expert Panel research / feedback; field assessment of each route; consultation with relevant aboriginal communities / organisations and other key stakeholders.

In the context of this project there are limited packaged tour products currently associated with these expedition routes; instead, visitation is generally represented by the Free Independent Traveller (FIT). These visitors fall within the target market segments identified by Tourism WA as Grey Explorers and Dedicated Discoverers.

Parry Creek Road

Desk research and stakeholder consultation undertaken support the view that visitation along the Parry Creek Road was generally limited to day use. The route represents an alternative scenic drive and provides access to the Lower Ord River. Although some tourism infrastructure improvements along this route are already in the planning and design phase (e.g. Valentine Springs, Middle Springs and Black Rock Falls), and recommendations have been put forward in relation to improving directional and interpretive signage, the day-use of the Parry Creek Road is unlikely to change. However, the Ngamoowalem

Conservation Park is an area that holds strong potential for the future development of tourism infrastructure and activities along the Parry Creek Road. Studies reviewed in relation to this area indicate there is strong interest from Traditional Owner groups to develop tourism facilities within the Park with a focus on maintaining cultural and environmental values. The development of tour products that incorporate local Indigenous heritage and culture is also a priority for this area.

Ngamoowalem Conservation Park provides an opportunity to enhance the visitor experience along the Parry Creek Road and will add to the diversification of activities along this route. This may not necessarily equate to increased visitor numbers to the region; however, it will give visitors a reason to extend their stay in the region and in turn increase visitor spend. Strategically, the Ngamoowalem Conservation Park is an area that can add significant value to the tourism experiences associated with the Parry Creek Road and the development of tourism, particularly cultural tourism products, within the Park should be actively pursued in line with Joint Management Plans for the area.

Kurunjie Track

During the pre-planning stage of field trips, potential issues became apparent in relation to accessing the Kurunjie Track as it passes through pastoral land and during muster periods access could not be guaranteed. This situation was confirmed by field personnel who observed signage along the route stating it was not a public thoroughfare. Field personnel also found a number of gates that were locked and therefore diversion routes around the gates needed to be taken.

It became evident that the leaseholders of the pastoral land through which the Kurunjie Track passes (Delaware North) are supportive of increasing visitor movements along this route. Taking into account the support of Delaware North (El Questro pastoral leaseholder) for increasing visitor movements along the Kurunjie Track and the proposed exclusion of the northern section of the Cockburn Ranges as part of pastoral lease renewals in 2015, the Kurunjie Track has future tourism potential. However, collective discussions need to be held between the leaseholder, SWEK and other related Government agencies in order to clarify and develop agreed parameters relating to visitors to the region being able to readily access this route.

Based on the assumption that issues relating to access along the Kurunjie Track can be resolved there is scope to develop a suite of tourism products along this route that incorporate the magnificent Cockburn Ranges. Discussions with relevant stakeholders suggest the development of walking trails, horse-riding trails, hiking treks and accompanying basic infrastructure could be established within the Cockburn Ranges. This development will not come into effect until the proposed pastoral exclusions have been executed, but the concept of developing tourism activities along this route is expected to give rise to increased visitor movements on the Kurunjie Track. A key advantage of developing tourism products and activities along the Kurunjie Track is its proximity to a range of accommodation options, such as El Questro Station, Digger's Rest, Home Valley Station and properties located in the Kununurra and Wyndham town centres. Importantly, the Balangarra Native Title Claimants expressed a strong desire to become more engaged and involved in matters relating to future use of the Track.

It is also noted that any future initiatives aimed at increasing visitation along the Kurunjie Track will need to be accompanied by strong marketing campaigns as a means of changing the current public perception relating to access. Furthermore, it is anticipated that any increased use of the Kurunjie Track by visitors to the region will not necessarily equate to an increased number of visitors to the region. Instead, increase traffic along this route is likely to be drawn from visitors who have already chosen to visit the region. However, it could be reasonably assumed that improved access, new tourism infrastructure and activities along this route will contribute to lengthening the stay of visitors and therefore contribute to increased visitor spend.

Carson River Track

Field personnel who completed the Carson River Track commented on the sheer ruggedness of this route and noted that many sections of the track were 'washed out' or impassable. It was also noted that 3 – 4 hours was required to cross a number of the rivers and creeks along the Track. Field assessments suggested that the Carson River Track would be appealing to the 'hard core' 4WD adventure enthusiasts and the upgrading of road conditions would require considerable capital investment. It was concluded that this investment would be hard to justify as track conditions change after each wet season and upgrades may detract from the 'expedition' experience. Instead, it was concluded that simply increasing access and visitation along the Carson River Track would help to improve travelling conditions through a process of self-maintenance (i.e. routes become more visible with more traffic).

During consultation with key stakeholders, the Balangarra Native Title Claimants also expressed a strong desire to become more engaged and involved in matters relating to future use of the Carson River Track.

The proposed development of the 4WD expedition routes is considered to be closely aligned to the objectives of the Kimberley Science and Conservation Strategy. The opportunities identified and recommendations relating to improving and upgrading tourism infrastructure provide scope to achieve small increases in visitor numbers and enhance the visitor experience, but perhaps more importantly they provide some scope to positively influence the level of visitor spending in the region. The expedition route initiatives do expand the range of eco-tourism product options within the region, and provide scope for Indigenous organisations, families and individuals to develop economic opportunities through the delivery of cultural and nature-based tourism products.

Kimberley Science & Conservation Strategy: Aerial Highway (KPP, Kimberley Science & Conservation Strategy: Kimberley Aerial Highway, 2012)

This project relates to the Kimberley Aerial Highway (KAH) initiative identified under the Kimberley Science & Conservation Strategy. The key deliverable required an assessment of remote airstrips in the Kimberley to determine the infrastructure upgrades that would support increased marketing and usage of the Kimberley Aerial Highway. Priority focus was given to airstrips that are located on Crown Land or DPAW estate.

There are approximately 107 aerial tour products currently available across the Kimberley, which in combination essentially form the Kimberley Aerial Highway concept being actively marketed by Tourism WA. These products operate primarily as day tours on a point-to-point basis from the main hubs of Kununurra and Broome. From a TWA perspective the Kimberley Aerial Highway concept is based on, and includes, any location in the region that can be accessed by air.

The task of identifying priority airstrips was put to the Delphi Panel with the ability to introduce any airstrip that could be included under the KAH concept, regardless of the level of current tourism infrastructure. However, it soon became evident that the industry view was that the priority airstrips should be determined on factors including proximity to major attractions, tourism activities and associated infrastructure, in addition to the availability of suitable accommodation. This is not to suggest that other locations should be excluded from the KAH concept. Instead, Panel members held the view that the airstrips identified provided the most potential in terms of the future promotion and usage of the Kimberley Aerial Highway that would contribute to the objectives of this project.

The identification of priority airstrips was expanded to explore the potential to develop a new KAH product that linked a series of remote airstrips as a continuous journey. However, the Panel recognized a need to upgrade accommodation at some locations in order to meet the expectations of what would be a high-end, niche market. Despite this, the Delphi Panel and the Expert Panel that reviewed results and project recommendations concurred that this

product is seen to open a new market segment opportunity targeted to a high end consumer. It is considered to be an additional product rather than a competitor to the current air tour scenic flight market and has not been proposed at the exclusion of the existing 'day tours' that form part of the KAH. It is considered that a package could be developed that includes 4 – 6 destinations at a fixed price rather than the current point to point product being offered. Other packaged alternatives that could be developed as part of the KAH include the combination of Kimberley Cruising together with Kimberley Aerial Highway destinations. Interestingly, the Kimberley Cruising and KAH packaged touring options both target high-end, niche markets therefore they are considered highly compatible in terms of cross-marketing and the potential to develop a number of touring options that provide visitors with a range of experiences.

Site assessments were undertaken by Aerodrome Management Services (AMS) at Windjana Gorge, Bellburn (Purnululu), Mt Barnett, Mitchell Plateau, Cape Leveque and Kalumburu in late June /early July 2012. A detailed summary of upgrade requirements were provided totalling $1.6m to bring all airstrips to CASA standards.

Although the brief called for the identification of six (6) priority airstrips, eleven (11) were identified for assessment to form part of the Kimberley Aerial Highway. Each of the sites was assessed against their market readiness (excluding airstrip upgrades). Market readiness was assessed against the level (standard) of available accommodation; on-ground amenities and facilities; availability of personnel on the ground to conduct tours (and transfer visitors) to nearby attractions; proximity and access to nearby attractions; and the level/standard of nearby attractions. Against these criteria, five (5) destinations were assessed as market ready (with the exception of aerodrome upgrades), while it was estimated that the remaining six (6) could be developed within a two (2) to five (5) year period.

Although there is little data available that looks specifically at tourism supply and demand models for air tours in the Kimberley region, a number of models were developed to estimate demand. Broadly, demand probability, demand factor and a supply models were developed to estimate an annual demand of 1,780 visitors per year.

On completion of desk research, Delphi panel surveys and site assessments, an Expert Panel was established to review and validate methodologies, findings and recommendations. This Panel consisted of a former Chairman of Australia's Northwest Tourism, a Kimberley air services operator, and highly credentialed tourism industry representatives from the east and west Kimberley. Indigenous elders from each language group who may be affected by the Aerial Highway or its infrastructure development were also asked to review and validate recommendations developed.

The Panel unanimously agreed with the priority destinations recommended but suggested the Berkeley River Resort and (to a lesser extent), Kalumburu should be included as other options for a proposed multi-destination product under the highway concept as well as the expansion of point to point products. The Panel was also unanimous that the promotion of a multi-sector product would increase visitation and would attract a new market compared with the current air tour operator product which is point to point. The Panel agreed that higher-end eco-tourism style accommodation and improved ground services would need to be developed into the future in order to secure the long term success of the concept and that a combination of rotary, fixed wing and seaplanes would increase potential visitor interest. Importantly, the process of identifying priority airstrips under the Kimberley Aerial Highway concept took into account all accessible airstrips in the Kimberley region with the key factors / criteria used in determining these locations applying to both existing products (point to point) and the potential for a new multi-sector product to be introduced. On that basis, the priority airstrips are considered relevant to both existing point to point products as well as the potential for a new multi-sector product to be introduced.

The Kimberley Aerial Highway concept is considered to be a close fit to the objectives of the

Kimberley Science and Conservation Strategy as it expands the range of eco-tourism product options within the region with minimum impact on the environment and will assist Aboriginal communities to develop culture and nature based tourism opportunities at key sites.

Kununurra Accommodation Study

(KPP, Kununurra Accommodation Study, 2009)

The visitor accommodation market in Kununurra currently holds sufficient inventory to meet both visitor demand and expectations. Although accommodation shortages will continue to occur during periods of peak visitation, the weighted average annual occupancy across all categories was reported at 48.07% in 2009. Over the past twelve (12) months high and low season occupancies averaged 81.86% and 23.91% respectively.

In the context of future demand for visitor accommodation, forecasts developed as part of this study suggest that the level of unmet demand across all accommodation categories is insufficient to justify any new developments in the short term (1-5 years). This finding takes into account low, medium and high growth scenarios across this time period.

The prospects for new visitor accommodation developments in the medium (5-20 years) to long term (20—50 years) appear more promising albeit directly dependent on the town achieving a medium to high rate of growth in demand. More specifically, opportunities for new visitor accommodation developments in the medium to long term are likely to arise through the resorts, hotels and backpacker categories.

Comprehensive gap analysis was undertaken through the development of econometric models using data supplied by current accommodation providers. The model outputs produced demand forecasts based on a series of assumptions over short, medium and long term periods under a range of growth scenarios. Assumptions used in this process included consideration of major developments such as the Ord Expansion Project, recent financial commitment from the Federal Government towards infrastructure improvements, incremental growth in tourism, anticipated future trends in tourism and other factors likely to influence demand for visitor accommodation in the town.

A key focus of this study was to analyse the supply and demand of visitor accommodation in Kununurra with a view to assessing the prospects for the development of new accommodation on specific sites identified by Shire of Wyndham-East Kimberley and Tourism WA. It was initially thought that two of these sites (Lot 2484 and Lot 793) could be designated as locations for new caravan park accommodation in Kununurra.

Demand forecasts developed do not support the development of new caravan parks in Kununurra. While it could well be argued that this does not address expected future shortages in this market, the economics of developing a greenfield site are almost certain to prove such a project as unviable. Instead, it is anticipated that the best means of meeting future shortages in the caravan market will be to add inventory to existing parks. Despite a proposed concept to develop one of the identified sites initially as worker's accommodation prior to transitioning the site to a caravan park the low yielding nature of this market is likely to result in the viability of a new park being marginal.

The future development of visitor accommodation in Kununurra is largely dependent upon the level of economic activity generated through the tourism, agricultural and resource sectors. The likelihood that new accommodation developments will be required in the medium to long term appear reasonable and it is for this reason that the specific sites identified as part of this study should be 'banked' by Tourism WA to cater to future needs. These sites all hold particular features and attributes and could be utilized to suit a range of markets or accommodation types as detailed further in the report.

WAITCO Strategic Plan 2011-2015

(WAITOC)

Western Australian Indigenous Tourism Operators Council (WAITOC) is the peak not for profit

Association representing Indigenous tourism in Western Australia. WAITOC comprises membership from all regions within Western Australia. The Association is autonomous and provides advice and information to all relevant State Government agencies as well as the tourism industry sector. WAITOC promotes Indigenous tourism and provides a supportive network for Indigenous tourism operators within Western Australia.

The objectives that guide the forward activities and operation of WAITOC are:

- To promote and raise the profile of Western Australia Indigenous Tourism on a State, National and International level.
- To encourage and support the development of existing, new and emerging Indigenous tourism businesses in Western Australia.
- To encourage greater collaboration between Indigenous tourism operators and non-Indigenous tourism operators including the promotion of joint ventures.
- To encourage employment of Indigenous people by the wider tourism industry.
- To encourage and develop a better relationship between Indigenous tourism operators and State, Federal and private tourism organisations.

Drive Market Report (Roy Morgan Research, 2012)

With changing holiday behaviour, cheap airlines and increasing petrol costs, the use of aeroplanes by last long trip travellers has increased by 11 percentage points over the last 11 years to 35.9% for the 12 months ending June 2012. Domestic long trip travellers are still most likely to favour using their own car or 4WD for transport, but use of hire vehicles has increased in line with air transport.

Drive only (where an aeroplane is not used) transport is still popular for the domestic market but has been declining over time, while use of air transport has increased. The proportion of travellers flying and then hiring or borrowing a vehicle at the destination also increased.

New South Wales, Queensland and Victoria are the most popular destinations for the domestic Drive market.

Almost half (47.2%) of the Explorers[14] segmentation had also visited WA on their last long trip, with 40.5% of Grey Nomads also having done so. South Australia was a common destination for around half of Grey Nomads, Couples and Explorers, while Queensland was the most common additional destination for the VFR market. The Fly & Drive market was the least likely to have visited another destination (see table).

[14] Explorers: Australians 14+ who spent 22+ nights away on their last long trip in the last 12 months and travelled by either their own car or 4WD, a friend's/ relative's car or 4WD, a hired car or 4WD, motorhome, caravan, campervan and not by aeroplane

Drive Market Segment	Australia	NT
VRF	1,777,000	28,000
Couples	707,000	16,000
Families	1,389,000	11,000
Explorers	225,000	39,000
Grey Nomads	498,000	22,000

The report includes a summary of travel behaviour by target segment (who have visited the NT) and provide some valuable insights.

- Interstate long trip travellers who have been to Northern Territory prefer to fly, with 51.6% doing so. There has also been an increase in the proportion using their own vehicle over the last two years.
- Preference for the NT amongst the Interstate Drive Only market has been in decline over the last 9 years, while Intention to visit has remained relatively stable.
- Around a third of most Drive Segments hold a Preference to visit the Northern Territory. Preference for NT amongst the Grey Nomads has grown strongly over the last 3 years, while declining amongst the Fly & Drive Market. Intention for the Northern Territory is highest amongst the VFR market
- Almost half (47.2%) of Explorers had also visited WA on their last long trip, with 40.5% of Grey Nomads. South Australia was a common destination for around half of Grey Nomads, Couples and Explorers, while Queensland was the most common additional destination for the VFR market.
- Grey Nomads and Explorers held a higher propensity to have visited places such as Tennant Creek and Other places in NT. Explorers were much more likely than any other group to have visited Katherine. Darwin was most popular for the Fly & Drive and VFR market.
- About a third of Couples and Explorers visited Uluru, compared to less than 20% of the Fly & Drive market.

The Fly & Drive segment were the most likely of all Drive segments to have visited the Northern Territory during the Low Season. Grey Nomads, and the VFR Segment were the most likely to visit during the Early Shoulder

Other places stayed on long trips to NT (% of total):

	VRF	Couples	Explorers	Grey Nomads	Fly/Drive
Kununurra	18.6	13.8	**27.3**	**25.5**	6.4
Other Kimberley	16.8	10	**22.0**	**18.3**	6
Broome	14.9	5.9	**19.1**	**16.5**	7.8

Kalumburu Pre-Feasibility Study

(KPP Business Development, 2012)

This project required a tourism demand and accommodation pre-feasibility assessment to be undertaken against four (4) identified sites around Kalumburu. With the approval of TWA, KPP later included an additional site within the Kalumburu community as a result of the initial site assessment process. Sites assessed included:

- Longini (approximately 7kms north of Kalumburu).
- Pago (2 sites). Site 1 (approximately 25 kilometres north of the Kalumburu). Site 2 (approximately 2km to the north of the first site along the coastline).
- Carson River Homestead (approximately 33kms southeast of Kalumburu).
- Drysdale River National Park (approximately 24kms southeast Carson River Station).
- Kalumburu Community site (approximately 300m north of current entry sign to Kalumburu).

Project implementation relied on a review of available research, market trends and demand; visitor surveys; on ground assessment of each site; consultation with affected aboriginal communities and other key stakeholders; and a high level assessment of financial viability.

As part of this project, visitor surveys were distributed through Visitor Centres between 21 May and 30 June 2012. The survey looked to target self-drivers who were taking a road journey along the Gibb River Road and to gain an understanding of their expectations compared with experiences. There were 124 surveys completed and results showed that:

- Over a third of respondents to this survey were aged 55-64, and 17.89% were over 65 years of age.
- Visitors from Victoria have a higher average household income when compared with visitors from Queensland, NSW or Tasmania.
- Survey results suggested that visitors believed they knew more about natural, historical and cultural attractions of the region (80%) when compared with essential services (75%), overnight stay options (71%) or road conditions (70%).
- Visitors expected to see gorges and waterfalls, large rivers, cultural and historical sites and had low expectations about road conditions, access to restaurants and cafes, and internet access.
- The vast majority of survey participants (95.16%) stated the trip was either a very positive or positive experience and would recommend the trip to family and friends.

The identified sites were assessed against four (4) key parameters: Physical Characteristics (ability to build, accessibility, seasonality, availability of fresh water); Eco Tourism Criteria (significance of landscape, community benefit, environmental impact, sites of cultural significance); Stakeholder Interests and Aspirations (alignment with community interest, land tenure, land release process, capacity to progress development); and Market Potential (ability to expand market potential).

The Longini site assessment revealed a number of physical, environmental and market constraints that prohibit future development of the site for tourism while the Pago site assessment revealed potential market limitations.

The Carson River Station site holds strong interest for Kalumburu community and Traditional Owners because of the connection and interest these stakeholders have with both pastoral activities and the desire to reside on Country. The site is also of significant interest to DPAW due to its access and proximity to Drysdale River National Park and the scope to improve science and conservation outcomes for the region by improved management of the pastoral lease. The option of a joint management agreement with DPAW is considered the most likely means of ensuring that conservation priorities are achieved and economic and employment opportunities for local people are created. However, tourism development at the

Carson River Station site is considered a medium term option (5 to 10 years) due to tenure issues at the site.

Due to accessibility issues, Drysdale River National Park is not considered suitable for development as part of this project. The site has future potential for a true eco-tourism venture due to its significant conservation values however the viability of such a development is questionable due to seasonality of the site limiting access to just a few months of the year. It is more likely that Drysdale River National Park will have a basic camp for nature and adventure based tourism activities, coordinated from the Carson River Station tourism site (and overseen by DPAW) once that site is developed.

Based on consideration of site factors, stakeholder interests and aspirations, eco-tourism fit and market potential, the report recommended that the site identified within the Kalumburu Community Layout Plan (Lot 39, Crown reserve 46596 held by the ALT) be developed. This site meets the targeted deliverables of the Kimberley Science and Conservation Strategy. The site also meets the triple bottom line model based on People, Profit and Planet in terms of social, environmental and financial viability.

The recommended concept is to develop mid-range quality tented accommodation with private facilities that are serviced by a Visitor Information and Business Centre; a kitchen with café style dining that prepares meals throughout the day; and a north Kimberley base for DPAW where Business Centre facilities are shared. This concept is compatible with micro enterprise development that includes tour products, transfer services, catering businesses and so on.

The Visitor Information Centre is specifically targeted to meet the needs of visitors, to provide information about the region, to sell tour product and therefore attract more people to the area and keep them there longer. There is also a significant opportunity to increase land tour operators to Kalumburu if adequate amenities and activities can be demonstrated.

Strategic Community Plan 2012-2022 (Shire of Wyndham East Kimberley)

The Strategic Community Plan has been developed to set a direction for the Shire's community for the next 10 years. The report addresses the current environment, economic and social impacts and future priorities identified by East Kimberley residents through the public engagement process.

These priorities identified the aspiration for cheaper flights in and out of Kununurra; more affordable housing and green spaces for children. There was also a desire for the promotion of racial harmony; safe house for kids; culturally appropriate education for aboriginal people; and the teaching of aboriginal language at schools.

Targets set in this plan were categorised into three (3) goals summarised as follows:

1. A more strategic approach to community engagement and regional development
2. Greater returns from Regional investments
3. Protection of lifestyle values

Goal 2 included a reference to tourism in its proposed implementation strategy in terms of promoting and supporting major events that benefit locals and attract visitors to the area.

Tourism Prospects on Miriuwung Gajerrong Conservation Lands Report 1 (Tourism Naturally, 2009)

This report focuses on accessing proposed tourism sites on MG Conservation Lands by using data from eco-retreat style accommodation in the Kimberley and establishing evaluation criteria against which potential sites can be measured. As part of this report, 19 existing eco-retreats were appraised.

The project is part of the Ord Final Agreement between the State and Miriuwung Gajerrong people which involved the transfer of six (6) new conservation areas to the MG People. As part of planning, a detailed investigation into tourism and recreation opportunities in the new conservation areas has been undertaken in consultation with DPAW and Tourism WA.

The assessment identified a number of criteria as being important in site selection. The most important locational advantages were summarised as follows:

- Sited with an excellent viewscape close to natural features such as gorges and waterfalls
- Waterfront with an opportunity to swim
- Possess a sense of place
- Reasonable access to a gateway

This report also reviewed existing properties in order to (ultimately) identify suitable locations for fishing camps, eco retreat style tourist accommodation; other tourist accommodation including caravan parks, commercial camping grounds, private or family camping grounds, and areas most suited to the delivery of guided tours.

Tourism Prospects on Miriuwung Gajerrong Conservation Lands Report 2 (Tourism Naturally, 2010)

Six (6) Conservation Areas were examined and evaluated as part of this project and a total of 15 potential sites were identified.

A number of sites were deemed to have excellent tourism potential. The report recommended that Feasibility Assessments be undertaken for those opportunities determined to have the greatest commercial potential. Priorities for further investigation included:

- Darram Wetlands and Cultural Centre to act as a tourism hub for MG Conservation lands.
- Jimilyiwoorr (Spring Creek) site for a Safari Lodge in Ngamoowalem
- Skeleton Creek site for high yield safari tents or cabins
- Turtle Beach, Cape Domett for an environmental safari lodge
- Yirralalem (Packsaddle Gorge) tented safari cabins at Wawoolam.

The report concludes that although the indigenous component of the tourism experience will be evident in product delivery, the tourism product identified is essentially an ecotourism experience. The report recommends the targeting of a broader eco-tourism market rather than a narrower cultural tourism market.

Figure 4: Tourism Prospects on MG Conservation Lands (Tourism Naturally, 2010)

Site	Area	Tourism opportunity	Target markets
The Gorge	Mijing	Camping site	Self drive explorers, Locals
Cape Domett	Mijing	Camping site	Self drive explorers, Locals
Turtle Beach	Mijing	Research Safari Lodge	High yield ecotourists
Lookout Springs	Jermandi-Winingim	Camping and cabins	Self drive explorers, Locals
Goonoonoorang	Barrberrm	Camping	Self drive explorers, Locals
Darram Lagoon	Darram	Waterfront Lodge	High yield ecotourists, tourists
Darram Lagoon	Darram	Wetlands and cultural centre	Self drive explorers, Locals, tourists, high yield ecotourists
Darram Lagoon	Darram	Tourist/ camping resort	self drive explorers, tourists
Yirralalem (Packsaddle Gorge)	Walwoolem	Safari cabins	High yield ecotourist, self-drive
Battery Creek	Ngamoowalem	Hut or camp network	Adventure trekkers
Ord R Fishing Camp	Ngamoowalem	Fishing Camp	Fishers
Galjiba	Ngamoowalem	Camping site	Self drive explorers, Locals
Jimilyiwoorr	Ngamoowalem	Safari Lodge	High yield ecotourists, fishers
Skeleton Creek	Ngamoowalem	Safari lodge or camping	High yield ecotourists or self drive explorers
Cave Springs	Goomiyig	Day use and campsite	Self drive explorers, Locals

Tourism Caravan and Camping Business Case Study (Brighthouse, 2010)

In 2009, work commenced on the Ord Irrigation Expansion Scheme which upon completion will release some 8,000 hectares of agricultural land. This project provided a boost to the profile of Kununurra and with it, increased tourist visitor numbers.

The seasonal nature of tourism in the region places pressure on accommodation facilities over the peak season and leads to a perception of inadequate caravan and camping sites, particularly in the key towns of the region. However, this report completed an audit showing the caravan and camping sites have annual tourist occupancy of less than 33%. This level of occupancy is deemed to be only marginally viable and is a disincentive to the development of new sites.

Camping in non-designated sites has a major impact on the viability of licensed caravan parks and campsites which are bound by standards of health, safety, infrastructure, sewer reticulation, potable water and power. Although local governments bear the cost of the clean-up of this illegal camping, it is generally on lands controlled by others such as DPAW and Main Roads.

This report recommends that the issue of illegal camping needs to be addressed if licenced facilities are to remain viable. The Caravan & Camping Act 1995 does not allow nature based camping within 50kms of a licenced facility however, the Inquiry into Caravan and Camping by the Economics and Industry Standing Committee of the Western Australian Parliament recommended that this restriction be eliminated subject to the development of guidelines for nature based facilities.

This business case provides a summary of the current situation in the Kimberley and expolores the barriers and opportunities for the development of new facilities in the region.

The report states there are 829 powered and 282 unpowered sites in the Shire of Wyndham East Kimberley at December 2010 and that Kununurra has had long term issues with insufficient capacity for more than a week over the peak of the season. Findings also demonstrate a growth in occupancy from 167,486 site nights occupied in 2007/08 compared with 179,162 in 2009/10. However, there is no indication if this increase has come from tourism or temporary workers to the town.

The report concluded expansion and/redesignation of existing facilities in Kununurra and Wyndham whereas opportunities for nature based camps in MG Conservation parks presented opportunities.

Appendix 11

Primary Research - Detailed Findings

2 Primary Research

2.1 Purpose

The purpose of this primary research phase was to fill data gaps identified through the desktop research; As part of the review of existing strategies, an assessment of visitor data demonstrated the lack of information available to align strategies with visitor profiles. Although a visitor survey had not been part of the scope of work originally agreed between SWEK and KPP, the lack of data regarding purpose of visit to the region; motivations for visiting the region; length of stay; travelling party; and basic visitor demographics became apparent.

2.2 Methodology

A Visitor Survey was therefore developed an distributed in in the East Kimberley over July 12 to July 31st 2013. Surveys were distribute through the following tour operators an accommodation providers.

Accommodation Properties – 200 to each property

- Kimberley Grande
- Country Club Resort
- IBIS Kununurra
- Lakeside Resort
- Lakeview Apartments
- Freshwater Apartments
- Hotel Kununurra

Caravan Parks – 200 to each Park

- Hidden Valley Caravan Park
- Ivanhoe Village
- Discovery Holiday Park
- Town Caravan Park
- Lakeside Caravan Park
- Wyndham Caravan Park
- Lake Argyle

Backpacker Properties – 100 to each property

- Kimberley Croc Backpackers
- Kununurra Backpackers

Tours Operators – 200 to each Operator

- Triple J Tours
- Slingair
- Kingfisher Tours (Shoal Air)

Kununurra Visitor Centre – 1,100

A total of 521 surveys were returned by 3 August 2013 representing 11% of distributed surveys. The sample is seen as adequate in that 9% of a sample group is deemed to be statistically valid. The composition of the survey respondents provides a good representative sample from varying types of accommodation providers and tour operators.

Accommodation	Number	%
Backpacker	42	9.48%
CCC	211	47.63%
Hotel	109	24.60%
Self-Contained	75	16.93%
Visiting Friends/Relatives (VFR)	6	1.35%

Table 6 – Survey Response by Accommodation

Tour taken	Number	%
Land	22	21.15%
Air	43	41.35%
Water	39	37.50%

Table 7 – Survey Response by Tour Taken

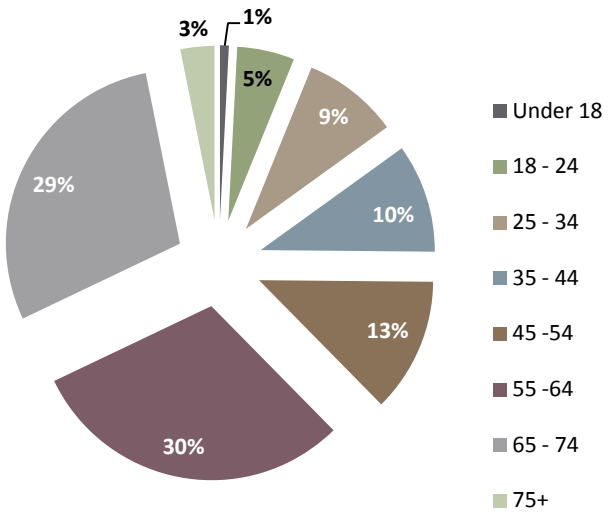
Survey respondents also represented a good sample of intrastate (26.82%), interstate (62.13%) and international (11.05%) visitors.

Place of Residence	Number	%
WA	136	26.82%
NT	5	0.99%
SA	29	5.72%
QLD	58	11.44%
NSW/ACT	114	22.49%
VIC	99	19.53%
TAS	10	1.97%
Americas	1	0.20%
UK/Europe	41	8.09%
Asia	10	1.97%
NZ	4	0.79%

Table 8 – Survey Response by Place of Residence

As has been the view anecdotally, visitors from the East Coast have higher household incomes than intrastate visitors. The average household income of international visitors is severely skewed in this sample due to the high level of backpackers.

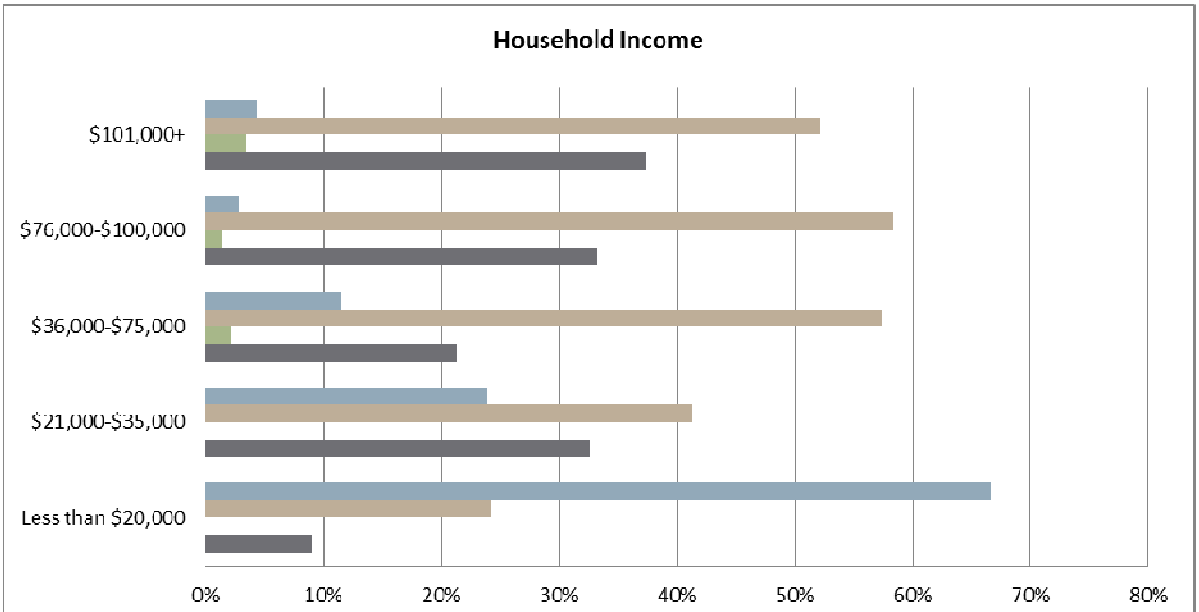
Figure 5- Survey Response by Age



Survey respondents were well represented across the age profiles with almost 60% being 55-74 years old. 24-54 year olds represented 31.5% of respondents while 3% of respondents were over 75.

There are substantial differences between responses from those travelling to the East Kimberley for holidays compared with those visiting for business. Therefore, results have been cross tabulated against the purpose of the visit so that results are not skewed to any one grouping.

Figure 6 - Household Income by Place of Residence

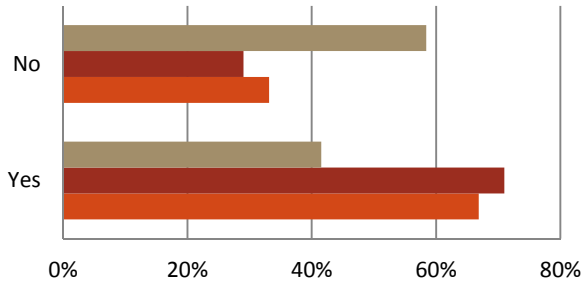


	Less than $20,000	$21,000-$35,000	$36,000-$75,000	$76,000-$100,000	$101,000+
International	66.67%	23.92%	11.48%	2.78%	4.35%
East Coast	24.24%	41.31%	57.37%	58.34%	52.17%
NT/SA	0.00%	0.00%	2.17%	1.39%	3.48%
WA	9.09%	32.61%	21.31%	33.33%	37.39%

Where other anomalies are apparent or results are skewed to a particular age or place of residence, these results have also been cross tabulated. Detailed findings address each question as it appeared on the survey.

Is this your first visit to the East Kimberley region?

Overall, two-thirds of respondents claimed this to be their first visit to the East Kimberley, however, the result is somewhat skewed in that 71% of those who have come for holidays, claim this to be their first visit. Only 42% of respondents who stated they are in the East Kimberley for business, have not been to the region previously.

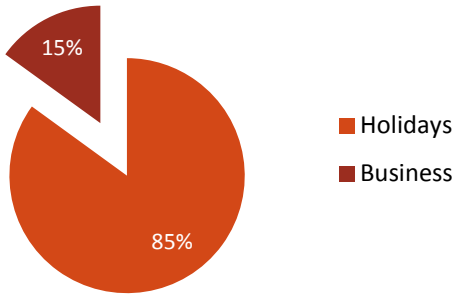


	Yes	No
Business	41.56%	58.44%
Holidays	70.97%	29.03%
Overall	66.86%	33.14%

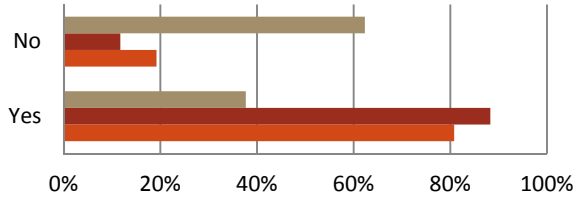
What is the main purpose of your visit?

85% of survey respondents stated they are in the region for holidays vis a vis15% who claim they are in the region for business.

Figure 7 - Visit to the Region by Purpose of Visit



Is this visit to the East Kimberley part of an extended trip to a number of destinations?



	Yes	No
Business	37.66%	62.34%
Holidays	88.29%	11.71%
Overall	80.82%	19.18%

Figure 8 - Destinations by Purpose of Visit

Almost 90% of respondents who are in the region for holidays state that the East Kimberley is part of an extended trip to a number of destinations compared with only 38% of those travelling for business.

Almost 12% of respondents who claim to be in the region for holidays stated that this visit is not part of an extended trip to a number of destinations. This group (51 respondents) includes people visiting friends and relatives, backpackers and a number of people who claim they are in Kununurra specifically for the Ord River Diversion Dam 50 year celebrations.

Who is in your travel party?

Around 70% of survey respondents stated that they were travelling with family or friends, although this increases to over 80% when visitors travelling for business are excluded from the sample. (Refer following chart).

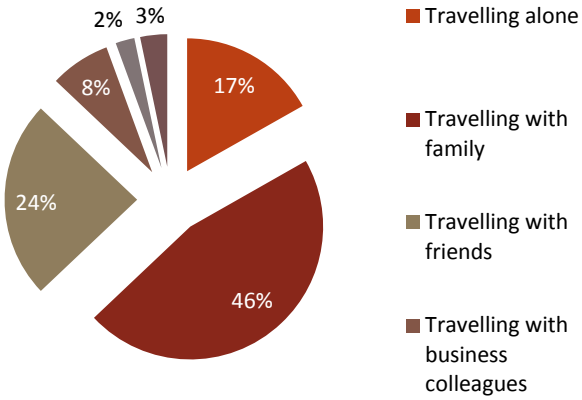
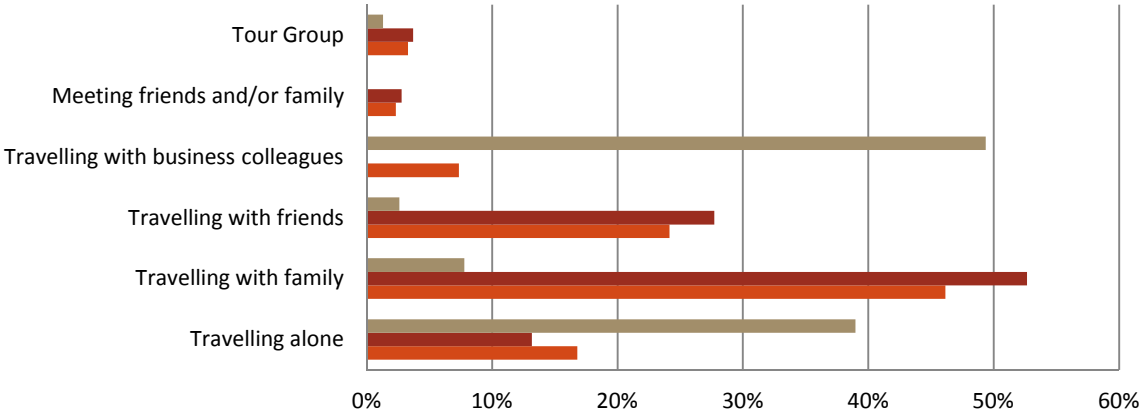


Figure 9 - Travelling Party

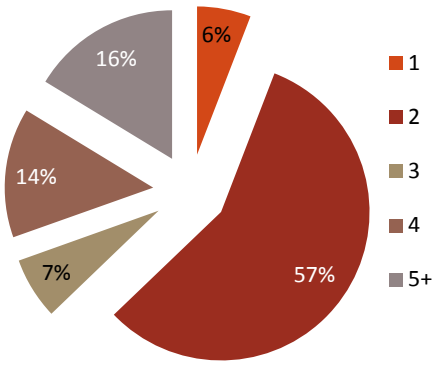


	Travelling alone	Travelling with family	Travelling with friends	Travelling with business colleagues	Meeting friends and/or family	Tour Group
Business	38.96%	7.79%	2.60%	49.35%	0.00%	1.30%
Holidays	13.16%	52.66%	27.71%	0.00%	2.77%	3.70%
Overall	16.80%	46.14%	24.13%	7.34%	2.32%	3.28%

As noted on the above chart, almost 50% of business visitors state they are travelling with colleagues, and a further 39% travel alone.

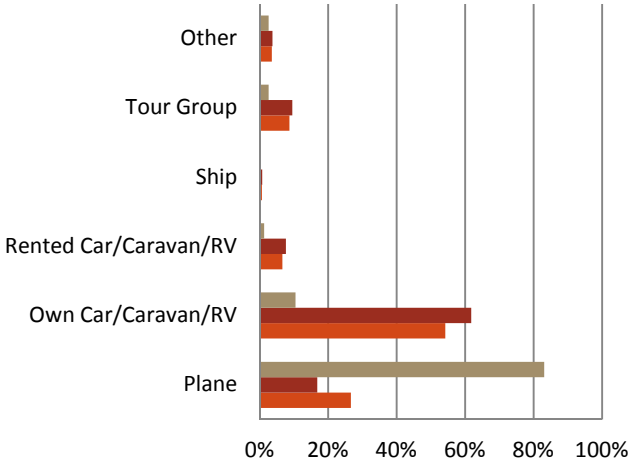
If you are not travelling alone, how many in your travelling party?

The majority of visitors travel with one other person (57%) while 16% travel in groups of more than 5.



How did you get here?

The significant majority (83%) of business travellers to the region arrived by plane compared with 16% of those travelling for holidays.



	Plane	Own Car/Caravan/RV	Rented Car/Caravan/RV	Ship	Tour Group	Other
Business	83.12%	10.39%	1.30%	0.00%	2.60%	2.60%
Holidays	16.82%	61.75%	7.60%	0.69%	9.45%	3.69%
Overall	26.59%	54.14%	6.55%	0.58%	8.67%	3.47%

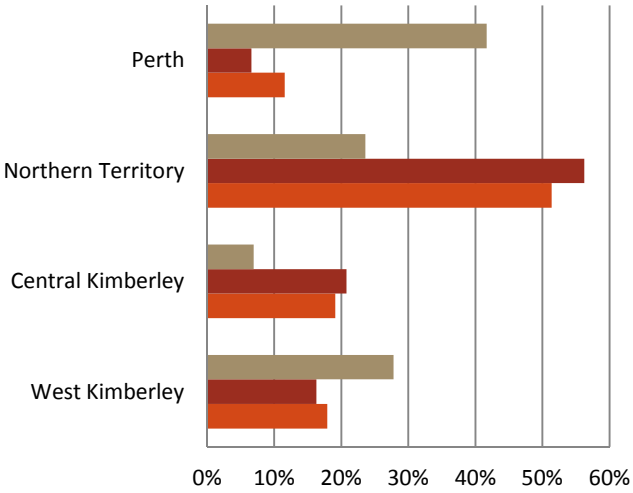
Figure 10 - Mode of Transport to Destination

"Other" mode of transport was principally used by backpackers who arrived by bus with Greyhound.

Where was your last overnight stay before arriving in the East Kimberley region?

The majority of holiday visitors (56%) came to the region from the Northern Territory compared with 37% who came from the Central or West Kimberley. A significant proportion of business visitors (42%) have come to the region from Perth compared with 23% from the Northern Territory and 27% from the West Kimberley.

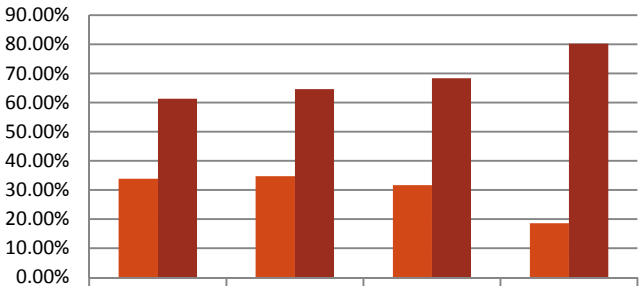
Figure 11 - Place of Last Overnight Stay



	West Kimberley	Central Kimberley	Northern Territory	Perth
Business	27.78%	6.94%	23.61%	41.67%
Holidays	16.31%	20.80%	56.26%	6.62%
Overall	17.93%	19.12%	51.39%	11.55%

How long will you be staying in the East Kimberley region?

Over 60% of business visitors stay in the region between and 1-5 days compared with 42% of visitors on holidays. 3-5 day stays appears to be the most prevalent length of stay for both business and leisure travellers.

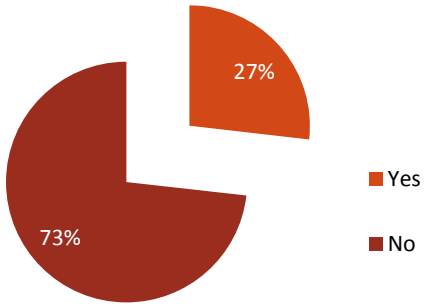


	1-2 days	3-5 days	5-7 days	1-2 weeks
25-54	33.87%	34.75%	31.63%	18.61%
55+	61.29%	64.64%	68%	80.23%

Figure 12 - Length of Stay by Age

If you are here for holidays, did you book any tours before you arrived?

73% of visitors to the region did not book any tours before they arrived. Intrastate visitors are less likely to book tours in advance compared with visitors from NSW and Victoria. One-third (34.43%) of visitors from NSW booked tours in advance of arriving to the region compared with 19.64% of visitors who live in WA.



If you are here for holidays, what were the main reasons you chose this destination?

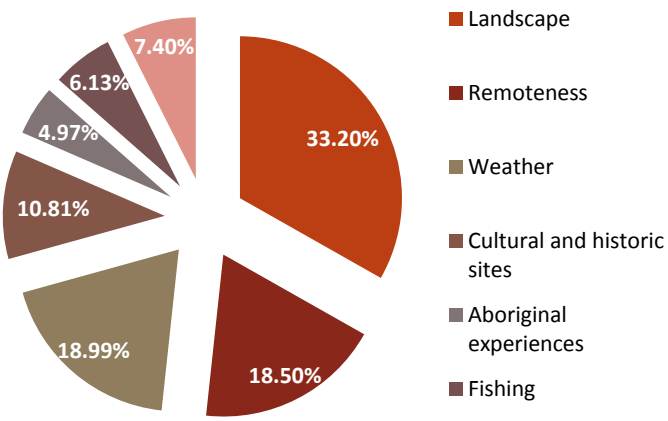
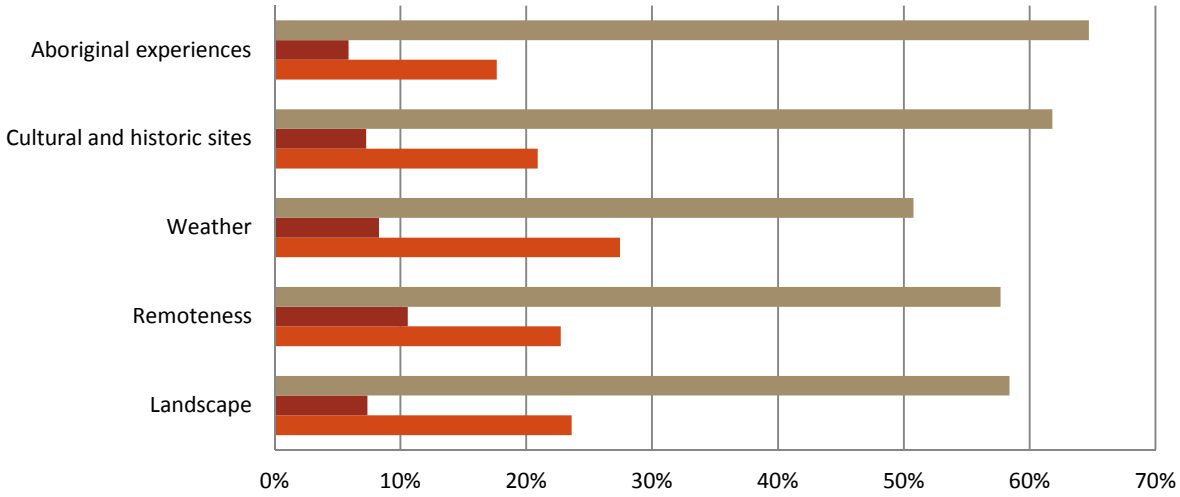


Figure 13 - Destination Motivators by Place of Residence



	Landscape	Remoteness	Weather	Cultural and historic sites	Aboriginal experiences
East Coast	58.40%	57.68%	50.77%	61.82%	64.71%
NT/SA	7.37%	10.58%	8.29%	7.27%	5.88%
WA	23.60%	22.75%	27.46%	20.91%	17.65%

One-third of survey respondents stated that the Landscape was the key reason they were visiting the East Kimberley region. The destinations' remoteness and weather were cited as the secondary motivations (18.99% and 18.5% respectively).

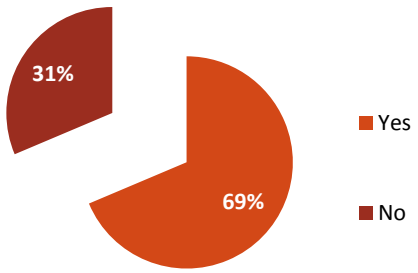
However, there the reasons for visiting vary by both place of residence and age. Whereas visitors from WA refer to weather as a key motivation, this is less important to visitors from the East Coast who claim Aboriginal Experiences (64.71%), Cultural and Historic Sites (61.82%), Landscape (58.4%) and Remoteness (57.68%) are the key reasons for visiting the region. [15]

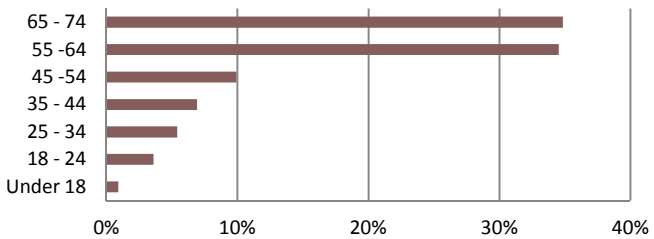
Do you plan to visit the Kununurra Visitor Centre while you are here?

69% of respondents claimed that they had plans to visit the Kununurra Visitor Centre. There were no particular skew to these results based on place of residence however, 72% of those who planned on visiting the KVC had claimed this to be their first visit to the region compared with 55% who had previously visited.

There is also a skew based on age where the older the respondent, the more likely they are to visit the KVC.

Figure 14 - Likelihood of Visiting the KVC and by age:





	Under 18	18 - 24	25 - 34	35 - 44	45 -54	55 -64	65 - 74
Yes	0.90%	3.60%	5.41%	6.91%	9.91%	34.53%	34.83%

[15] Note that percentages do not add up to 100% as multiple variables could be chosen by **respondents.**

Where are you planning to visit on this trip to the region?

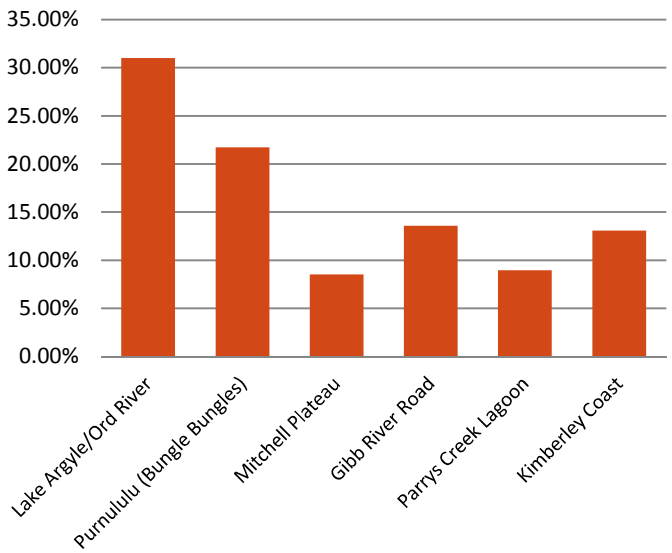
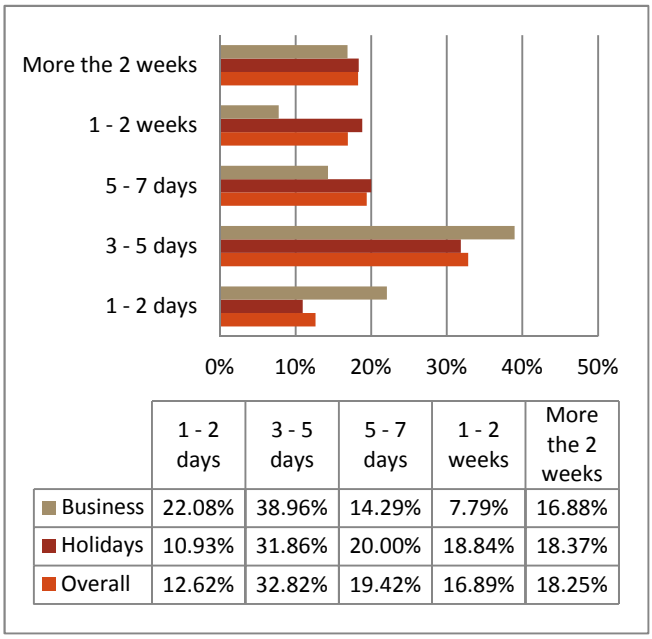


Figure 15 - Planned Destinations within the Region

Lake Argyle followed by Purnululu are the most likely places the leisure market plan to visit on their holiday in the region.

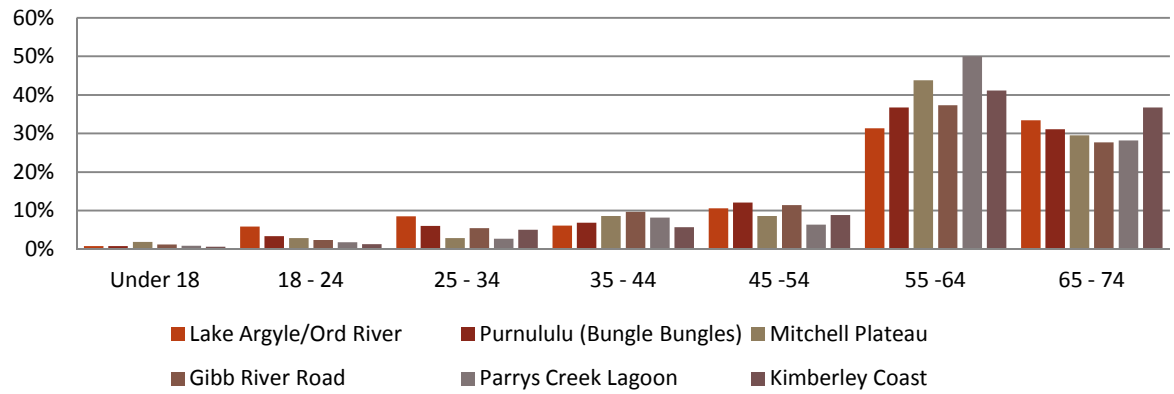
However, there are significant variations when planned destinations are cross tabulated against age. This data shows that visitors aged between 55-74 are more likely to visit most iconic destinations compared with younger visitors. The larger number of destinations that are planned to be visited in the region by older visitors has a clear relationship to their average length of stay as shown on the accompanying chart. 80% of visitors 55+ say they will be in the region from 1-2 weeks compared with 19% of visitors aged between 25-54.



	1 - 2 days	3 - 5 days	5 - 7 days	1 - 2 weeks	More the 2 weeks
Business	22.08%	38.96%	14.29%	7.79%	16.88%
Holidays	10.93%	31.86%	20.00%	18.84%	18.37%
Overall	12.62%	32.82%	19.42%	16.89%	18.25%

Figure 18: Length of stay by type of visitor

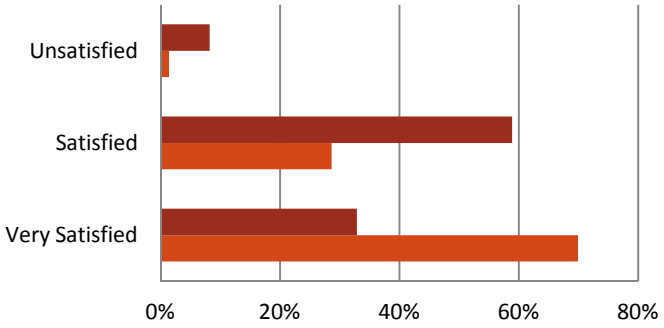
Figure 16: Planned Destination by Age



How satisfied are you with your overall visit to the East Kimberley region?

Overall, there is a high level of satisfaction with respondents' visit to the region with 64% stating they were very satisfied; 33% stating they were satisfied; and 3% stating they were dissatisfied.

However, cross tabulation of these responses by purpose of visit shows that leisure visitors tend to have a higher level of satisfaction compared with business visitors. Whereas 70% of leisure visitors claim high satisfaction, this compares with 33% against business visitors.



	Very Satisfied	Satisfied	Unsatisfied
Business	32.88%	58.90%	8.22%
Holidays	69.93%	28.64%	1.43%

Figure 17 - Destination Satisfaction by Purpose of Visit

What do you think requires development to improve the experience for visitors to the East Kimberley?

237 (45%) of survey respondents provided suggestions to improve the experience for visitors. Of respondents 48 (9%) were in the region for business.

Comments were categorised into major themes for both leisure and business visitors, as comments varied dependent upon purpose of visit to the region.

Leisure visitor comments can be summarised in the following groupings: Road conditions; Cost; Internet and Mobile Coverage; the Visitor Centre; Service; the Town; and Facilities/Amenities.

Road Conditions – 19% of leisure visitors focused on the poor condition of the Gibb River Road, the single lane bridges on the Northern Highway and the access road to Lake Argyle.

"Roads need to be upgraded especially the single lane bridges"

"Build world class roads into world class Bungles, El Questro and Emma Gorge"

"Dirt roads are terrible. No indication just how bad. We blew many tyres"

"The turn off road to Lake Argyle is VERY DANGEROUS- too narrow for caravans passing or other vehicles"

"Roads to Emma Gorge, and Bungles are an absolute disgrace"

Cost – 16% of leisure visitors focused on the cost of fuel, tours, airfares and accommodation.

"More reasonable prices - all over the top. You feel you are constantly being ripped off"

"Cost of fuel and groceries are too expensive. Much dearer than the NT"

"Airfares too high and you can understand why people go to Bali. Even overnight stay in hotel will pay for a trip to Bali. E.g. Breakfast at $16 for toast and cereal"

Internet and Mobile Coverage – 18% of respondents complained about the lack of mobile phone coverage and internet access.

"Mobile phone and internet service at Lake Argyle"

"More 3G on bitumen - not just Telstra"

"Improving phone and internet coverage would encourage me to stay longer"

The Visitor Centre – 9% of leisure visitors complained about the knowledge of staff; trading hours or service received.

"People at the VC need training They are clueless and rude"

"Some staff have bad attitudes and need anger management. Unfortunately some are at the Visitor Centre"

"Longer opening hours at the Visitor Centre"

"Tourist information Centre open later on Sunday"

Service – 8% of survey respondents suggested that Kununurra is not tourist/visitor friendly.

"Can you believe they call tourists - terrorists!!!"

"Teach the locals about customer service"

"Service is about the worst in WA"

The Town – 8% of respondents focused on the town in terms of streetscapes and the general tired look of the town.

"Town needs refurbishing. Exciting to see a town after being on the road and it's a great disappointment"

"Town feels tired and old"

"Visitor Centre looks tired like the town itself. Desperately needs a facelift"

Facilities and Amenities – 24% of respondents commented on the need for improved facilities and amenities. Focus centred on more dump points; better road signage; parking bays for caravans in town; greater range and quality of places to eat: and some type of shuttle bus service to get around town and nearby attractions.

"Desperately need decent coffee, restaurants. Even Macca's would be better that current fare"

"Improved parking for Car/Caravan in shopping centres and publication of these. Dump point locations. Adequate staff in Information Centres at peak times. e.g. 40 minute wait in Kununurra Visitor Centre"

"More signage! Upkeep of tourist areas. Bins are inadequate, and overflowing"

"Cheap and accessible shuttle to attractions"

Business visitor comments were substantially common across three (3) themes: Better access, improved facilities and activities and service.

Access - 28% of business visitors who responded to this question raised the need for better connecting flights and transport between the airport and town.

"Connecting flights - forced to overnight in Darwin"

> *"Airnorth services to Broome unreliable. I have been stranded in KNX 3 times due to failure by Airnorth to have backup plane in DWN. More KNX- PER - KNX direct flights please"*

"How about a taxi at the airport to get to town? Waited over half an hour..."

"Reliable taxi service or shuttle bus from airport"

Improved Facilities and Activities – 29% of business visitors who responded to this question raised the need for more restaurants, variety of eating venues and something to do after work.

"More and better quality food outlets and restaurants"

"Better dining and takeaways facilities"

"How about a decent restaurant and a decent cup of coffee"

"More events in town at night"

"Nightlife"

Service – 11% of business respondents noted the need to change the attitude of locals to visitors.

"People in Kununurra really don't like tourists and it's obvious"

"Better service - KNX isn't a very inviting town for visitors"

"Needs to be more visitor focused. It's as if we're an interruption to their lives."

Appendix III - Consultation

3.1 Consultation

A key phase of this Plan involved consultation with industry operators and stakeholders. The purpose of this consultation was to validate baseline information, key findings and conclusions drawn from the Desktop Review and Visitor Surveys, and gather stakeholder views in terms of the current and future tourism priorities for the East Kimberley.

3.2 Methodology

The methodology adopted and implemented for the consultation phase of this project can be summarised as follows:

1. Stakeholder mapping and development of a target stakeholder list
2. Development of a consultation plan to guide the efficient and effective implementation of consultation activities
3. Meetings in person with stakeholders and industry operators, where possible
4. Consultation with industry operators and stakeholders by telephone
5. Recording key points of all discussions

3.3 Stakeholders

A range of industry operators and stakeholders were consulted through this phase and broadly included representatives from:

- Government agencies
- Industry operators in the East Kimberley
- Indigenous stakeholders
- Tourism industry bodies

The list of industry operators and stakeholders are shown in the following table.

Stakeholder	Agency
Project Steering Group Members	
Janet Takarangi Economic Development & Remote Service Delivery Officer	Shire of Wyndham East Kimberley
Glen Chidlow (CEO)	Australia's North West Tourism
Johnny Edmonds (CEO)	WAITOC
Nadia Donnelly (Manager)	Kununurra Visitor Centre
Brad Williams (President) Lee Irvin	Kununurra Chamber Commerce & Industry
Jeff Gooding (CEO)	Kimberley Development Commission
Daryl Moncrieff Regional Manager, E. Kimberley	Department of Parks & Wildlife (DPaW)
Sue Campbell (Project Manager)	Tourism WA
Regional	
Nick Linton (General Manager)	Broome Visitor Centre
Liz Jack *[16] Project Manager – Aboriginal Tourism Kimberley Science & Conservation Strategy	Tourism WA
El Questro Station	
Home Valley Station	
Warmun Art Centre	
Warringarri Arts	
APT / Kimberley Wilderness Adventures (Rob Tandy)	
Outback Spirit *	
East Kimberley Tours (Paul Wainwright)	
Lake Argyle Village (Charlie Sharpe)	
Cissy Gore-Birch Gault (Chairperson) *	Balangarra Aboriginal Corporation
Cathy Goonack (Chairperson), Bevan Stott	Wunambal Gaambera Aboriginal Corporation
Northern Airport Services (Frank Rodriguez)	
Drysdale River Station (Anne Koeyers)	

[16] * denotes stakeholders consulted through recent similar projects such as KSCS – Tourism Initiatives in late 2012.

Stakeholder	Agency
Triple J Tours (Jeff Hayley & Grant Lodge)	
Slingair / Heliwork (Sonja Mitchell)	
Shoal Air / Kingfisher Tours (Steve Irving)	
Kimberley Accommodation (Martin Pierson-Jones)	
Michael Mc Conachy (Freshwater Apartments)	
Lakeside resort (Laurie Mc Kenzie)	
Ibis Kununurra (Robert Poh)	
Kununurra Country Club Resort (Alistair Gooray)	
Kimberley Grande (Simon Della Santa)	
Ebony Muirson (Kimberley Coastal Camp)	
Peter Stubbs	DLRD – Ord Stage II Project
Vaughan Davies	Department of Aboriginal Affairs
State	
Gary Taylor (Project Manager, KSCS)	Tourism WA
Brooke Gregory (Domestic Marketing)	Tourism WA
Renata Lowe (Projects Director)	Tourism WA
Michelle Ellis	Eventscorp
Jackie Farmer *	Regional Development and Lands
Karl Eringa *	Pastoral Lands Board, RDL