

Kimberley Whale Coast Tourism:

A REVIEW OF OPPORTUNITIES AND THREATS



AUGUST 2010



Presented by:
Curtin Sustainable Tourism Centre
Curtin University

Curtin 
University of Technology

CONTENTS

Introduction	6
The Kimberley Region	8
The Broome and Kimberley 'Brand'	10
Concept of Brand	10
The Kimberley Brand	10
The Broome Brand	10
Tourism in Broome and the Kimberley	14
Broome and Kimberley Visitor Profile	14
Kimberley Economic Contributions: Tourism and other sectors	15
Activities and Attractions	18
Aboriginal tourism products	19
Visiting the beach	21
Cruising, flying and driving	21
Whale watching	22
Recreational fishing	24
Government Support and Funding	25
Impacts on the Kimberley and Broome Tourism Brand	26
Comparative examples of destination impact	26
Shetland Islands	26
LNG processing plant	27
Browse Basin supply base – Broome location	28
Kimberley Tourism Development Priorities	32
Relocation of Airport	32
Sealing of Some Roads	32
Accommodation	32
Attractions and Activities	32
Broome and the Kimberley Tourism Potential	33
Tourism Priorities	33
Establishment of a Marine Park	33
Relocation of airport with links to Singapore "Hub"	34
Sealing of Cape Leveque road	34
Tourism Product Potential	34
Whale watching	35
Aboriginal tourism	35
Implications and Conclusion	36
Conclusion	36
Report Findings	36
References	37

PREFACE

This report was prepared under contract to the Wilderness Society (WA). Curtin Sustainable Tourism Centre - Curtin University, developed the material contained in this report based on published documents and industry reports, government statements and in consultation with a range of individuals and organisations.

Report for:
The Wilderness Society WA
Conservation Council of WA and
Environs Kimberley

CITATION

Curtin Sustainable Tourism Centre (2010) Kimberley Whale Coast Tourism: Opportunities and Threats. Report for the Wilderness Society (WA), July 2010.

DISCLAIMER

All information in this report was considered correct and current at the time of publication and any errors or omissions are unintentional. The Curtin Sustainable Tourism Centre disclaims all and any liability to any person in respect of the consequences of any action or consequence for such persons in reliance, whether wholly or partially, on this report.

List of Tables

Table 1: Annual average number of holiday-leisure overnight visitors to Shire of Broome.	14
Table 2: Shire of Broome visitor overnight stay and expenditure.	14
Table 3: Selected total output multipliers for the Kimberley region.	17
Table 4: Types of tourism related businesses in Broome.	17
Table 5: Range of activities available in Broome and West Kimberley.	18
Table 6: Recipients of tourism related funding through the Kimberley Regional Grants Scheme for 2008/2009.	25

List of Figures

Figure 1: Illustration of Humpback whale calving grounds.	7
Figure 2: Images of Kimberley landscapes. Source: Tourism WA Image Library (2010c)	9
Figure 3: Images of the Kimberley. Source: Tourism WA image library (2010c)	11
Figure 4: Images of Broome. Source: Tourism WA image library (2010c)	12
Figure 5: Images of Broome. Source: Tourism WA image library (2010c)	13
Figure 6; Kimberley employment figures by industry. Source: Kimberley Development Commission (2009)	15
Figure 7: Kimberley gross regional product by industry. Source: Kimberley Development Commission (2009)	16
Figure 8: Examples of Aboriginal tourism operations in Broome and the Dampier Peninsula. Source: KPP Business Development (2009)	19
Figure 9: Images of Kimberley Aboriginal tourism products. Source: Tourism WA image library (2010c)	20
Figure 10: Images of Kimberley Aboriginal tourism products. Source: Tourism WA image library (2010c)	20
Figure 11: Images of Cable Beach. Source: Tourism WA image library (2010c)	21
Figure 12: Images of adventure tourism in the Kimberly. Source: Tourism WA image library (2010c)	21
Figure 13: Map of tourism cruise, flights & tour routes Broome/Dampier Peninsula.	22
Figure 14: Images of humpback whales near the West Kimberley coast.	23
Figure 15: Map of recreational fishing locations near James Price Point. Source: Wright G. and Pyke C. (2009, p13)	24
Figure 16: Satellite photo of James Price Point. Source: Google Earth.	27
Figure 17: Aerial view of James Price Point at low tide, note the cultural walk trail / 4WD track.	28
Figure 18: Concept map for proposed supply base in Town of Broome. Source: Worsley Parsons (2009, p38)	31

EXECUTIVE SUMMARY

The Kimberley region covers a vast area of northern Western Australia. Broome is the largest town in the region and in the West Kimberley, which includes Derby, Fitzroy Crossing and numerous discrete Aboriginal communities; it has emerged as that region's commercial and administrative centre. The expansive Kimberley landscapes and relatively untouched coastal and marine areas, together with vibrant Aboriginal traditional societies and a fascinating colonial heritage, provide the main components of this celebrated nature-based and cultural tourism destination.

This report was commissioned by The Wilderness Society WA, the Conservation Council of WA and Environs Kimberley (the ENGOs) to investigate the successful Kimberley tourism 'brand', the scope for building on this brand through enhanced marine protection, and the likely impacts on tourism of a large-scale heavy industry oil and gas extraction and processing complex in the West Kimberley and Broome coastal and off-shore area. This report is based on desktop analysis using published reports and past research and information from consultations with individuals and organisations based in the region.

Key Findings and Implications

The evidence suggests that the tourism industry in the Kimberley and Broome has great potential to further develop its already significant contribution to the region's economy. This potential and contribution would be severely damaged by development of the oil and gas industry in the region with its relatively lower level of regional socio-economic benefits.

Kimberley and Broome Tourism

The Kimberley brand has been built with considerable effort over an extended period of time from significant public and private investment. Any threat to the Kimberley and Broome experience will devalue the brand and undermine this investment. Recovery from damage to the brand would be a major challenge entailing considerable additional investment, effort and time.

The Kimberley Tourism industry relies heavily on branding an image of the region's spectacularly beautiful landscapes and coastlines, a relaxed feel, the outback experience, sustained Aboriginal culture and a multicultural migrant heritage.

Research shows that the Kimberley is one of two regions tourists associate with holidays in Western Australia. The other is the South-west. The Kimberley and Broome are integral components of the Western Australian tourism brand and image. Because of its special natural and cultural assets, the Kimberley has been included in the Federal Government's National Landscapes Initiative. Development of heavy industry and the likely impacts on the landscape and tourism run counter to the aims of this initiative.

Niche products include a burgeoning Aboriginal tourism sector encompassing a range of accommodation and cultural experiences, tours and arts and cultural products. The remote outback 4WD experience is also a rapidly growing feature of Kimberley tourism.

The region hosts the world's largest Humpback Whale population during breeding time, with opportunities for viewing whale calves in a beautiful and undisturbed marine and coastal setting.

Regional Economic Benefits of Tourism

Kimberley tourism was worth about \$637million in 2008 and represented 35.8% of the region's economy. Tourism is also very important to Broome, representing about 64% of the total revenue generated in the town. The Kimberley has a broad-based and diverse economy in which tourism plays a major role.

Tourism is a labour-intensive sector that affords relatively more employment opportunities for local residents than Oil and Gas. Oil and Gas is capital intensive and employs a relatively small, highly skilled labour force that tends to live mainly outside the region on fly-in fly-out arrangements, offering fewer opportunities for local employment.

Comparison of total output multipliers for the Kimberley region demonstrates that tourism-related industries have a much higher regional economic return on each dollar invested (\$1.50–\$1.70) than Oil and Gas (\$1.18).

It is widely recognised that the mining and gas industries in other regions, such as the Pilbara, have not delivered substantial net regional socio-economic benefits, particularly to Aboriginal communities.

In contrast, tourism supports employment across a broad range of venture types in Broome and the West Kimberley. The sector provides for a significant source of employment and socio-economic benefit to many Aboriginal communities in the region.

Tourism directly employs about 20% of the Aboriginal labour force in the West Kimberley and Broome area. It employs at least 17% of the total Broome labour force and at least 12.5%, and possibly up to 27%, of the Kimberley labour force. In contrast, 0.1% of employees within the Shire of Broome worked in the mining industry in 2006.

The tourism sector in Broome and the Kimberley is highly integrated, each component relying heavily on the viability of the others. For example, lack of available accommodation would have a negative effect on the other tourism products and services and hurt the tourism industry across the region.

The non-extractive character of nature-based and cultural tourism promotes sustained economic benefits to the Kimberley region, while Oil and Gas has a finite life span, with a peak production period followed by a decline in activity.

Likely Impacts of the LNG Plant and Supply Base

Development of an LNG processing plant and supply base to support offshore oil and gas extraction could significantly damage the widely recognised brand of the West Kimberley and Broome region as a tourist destination.

The proposed location of the LNG plant on flat terrain and its 24-hour operation will make it visually dominant night and day from established marine and terrestrial viewpoints. Increased passage of oil and gas industry boats and shipping between James Price Point and Broome could diminish the visual amenity and experience of Broome's famous Cable Beach.

A possible Browse supply base in Broome would require major expansion of the current exploration supply base, up to 200 ha or more to the north and south of the town, and conversion to a 24-hour operation. Broome port area may become off-limits to tourists and the general public for safety and security reasons.

Development of 24-hour heavy industry activity in Broome and on the Dampier Peninsula (both on- and off-shore) will inevitably result in visual, air and noise pollution and the transformation of the Broome and regional image into one dominated by heavy industry.

Development of a comparable venture in the 1970s on the Shetland Islands, a remote nature-based and cultural tourism destination, resulted in a catastrophic decline in tourism activity. The region acquired an industrial town image. Attempts to rebuild tourism in the region were severely hampered by an oil spill during the operation phase. Benefits to the region's former tourism accommodation providers, now housing oil industry workers, dissipated once the peak operation phase had passed. This was despite careful planning and best practice during the construction and operation of the processing and supply-base facilities.

Tourism Potential

The annual Kimberley Humpback whale congregation has created a burgeoning whale-based tourism industry on the Kimberley coast. There are currently around 10 different tour operators, including Aboriginal run businesses, offering focused whale-watching experiences.

Tourism WA cites a series of tourism development priorities for the region including expansion of the airport, sealing of the Broome to Cape Leveque road, support for Aboriginal tourism accommodation, products and services development. The WA Marine Parks and Reserves Authority (MPRA) has recommended the urgent establishment of a comprehensive marine park over the whole of State waters in the Kimberley¹. [MPRA Annual Report, 2008/09, p 3]

¹"In relation to the Kimberley, the Authority has proposed to the Minister for Environment that the Government urgently protect the Kimberley through the establishment of a multiple use marine park over the whole of State waters in the Kimberley with the full reservation of currently identified iconic areas by an appropriate zoning system in the broader multiple use marine park."

Marine parks and protected areas have been shown to boost regional tourism and bring significant regional economic benefits.

Sealing of key roads and expansion of the airport could improve accessibility and subsequent demand for tourism experiences and services through increased visitor numbers and extended seasonal access.

Further development of the growing whale-watching industry as a niche wildlife tourism experience could extend the chain of marine wildlife experiences along the WA coast, from dolphins and penguins in the south to dolphins, whale sharks and turtles on the Gascoyne coast area, and whales in the Kimberley.

Support and further development of Aboriginal tourism products and services is stated as a priority by the Federal Minister for Tourism and the Federal Minister for Environmental Protection, Heritage and the Arts.

Aboriginal tourism is considered a way of reducing welfare dependency, strengthening cultural identity, fostering Aboriginal pride, promoting cross-cultural awareness and understanding, preserving elements of traditional culture and changing mainstream negative stereotypical views about Aboriginal communities. It also positions Australia as a culturally distinctive destination.

Given the potential for numerous market-ready enterprises in Broome and the West Kimberley to be upgraded to export-ready status, further development of authentic, quality Aboriginal tourism experiences is likely to significantly enhance the growth of the region's tourism industry and further contribute to a dynamic regional economy.

Conclusion

Large-scale industrial development would devalue the Kimberley brand and adversely affect tourism, a major component of the Broome and Kimberley economy. This impact would flow through to tourism operators, regional employment and business viability. The timing and duration of these impacts is unknown but indications are that LNG plant development would significantly undermine the image of the Kimberley as a nature-based and cultural tourism destination and seriously damage the multi-million dollar tourism sector that has taken decades to build. Any industrial accidents associated with the LNG operations would have a similar impact on the sector and should be the subject of extensive preventative planning and emergency preparedness.

As a non-extractive activity, nature-based and cultural tourism is a sustainable and profitable industry that is likely to generate greater socio-economic returns to the region than the oil and gas industry, with its limited life span.

Report Findings

- Development of heavy industry in Broome and the West Kimberley is not compatible with the nature based and cultural tourism that underpins the region's special status and makes a significant economic contribution to the region.
- Ongoing government support for, and investment in, tourism, particularly Aboriginal tourism ventures, would provide a better regional socio-economic return with a much lower risk to the natural and cultural environment than Oil and Gas.
- Investment in tourism in the region will create more local employment and greater strengthening of social and community wellbeing than investment in Oil and Gas
- Establishment of an extensive and appropriately managed marine park in the Kimberley is vital for the protection of a unique and world-renowned natural area that is also attractive to tourists
- Implementation of the tourism development priorities outlined in this report from Tourism WA's Australia's Northwest: tourism development priorities 2010-2015 document should be carefully considered by regional stakeholders and government with regard to the future development of the Kimberley tourism industry.

INTRODUCTION:

The Western Australian State and Australian Federal Governments are in the process of planning a large scale Liquefied Natural Gas (LNG) processing plant on the West Kimberley coast, to be located at James Price Point, 50km north of Broome (Figure 1). It is assumed by the government that the development will increase local employment.

The LNG plant and associated supply base will support development of the offshore Browse Basin gas reserves, one of Australia's most hydrocarbon-rich basins. While exploration has been going on since the late 1960s, the development of the Browse Basin has recently become viable because of favourable market conditions².

According to government reports, the construction of the LNG plant over several years will employ up to 5,000 mostly FIFO workers. This figure includes the cumulative full-time, casual and part time jobs over the duration of the construction phase. The operational phase will host about 500 mostly FIFO workers over 30-40 years. Although the workforce may be accommodated at James Price Point, Broome functions as the social, commercial and administrative hub for the region.

It has been suggested that Broome should be the site for a supply base to support the Browse Basin project and construction and operation of the LNG processing plant³ because of its existing infrastructure and services currently supporting offshore exploration, and it being the only deepwater port on the Dampier Peninsula. In order to support LNG plant construction and processing and offshore operations, the current supply base in Broome would have to be considerably expanded.

This report was commissioned to outline the current status and potential of tourism in the Broome and West Kimberley region. The report also outlines potentially negative impacts on the tourism status of this region from developing an onshore LNG processing plant at James Price Point with the associated expansion of support-base facilities in Broome. This report is based on extensive evidence in published documents, statements by government departments and ministers and consultation with a range of individuals and organisations based in the region.

Scope

The report deals with the following themes:

- the profile of existing tourism and related business activity in the West Kimberley;
- defining the Broome and Kimberley brand;
- the current level of Government support for tourism in the Kimberley in comparison with that of other economic activities
- comparisons with equivalent regions;
- some implications for sustainable, locally/regionally 'owned', socially and culturally compatible development.

² Dept of Mines and Petroleum (2009)

³ WorleyParsons (2009)

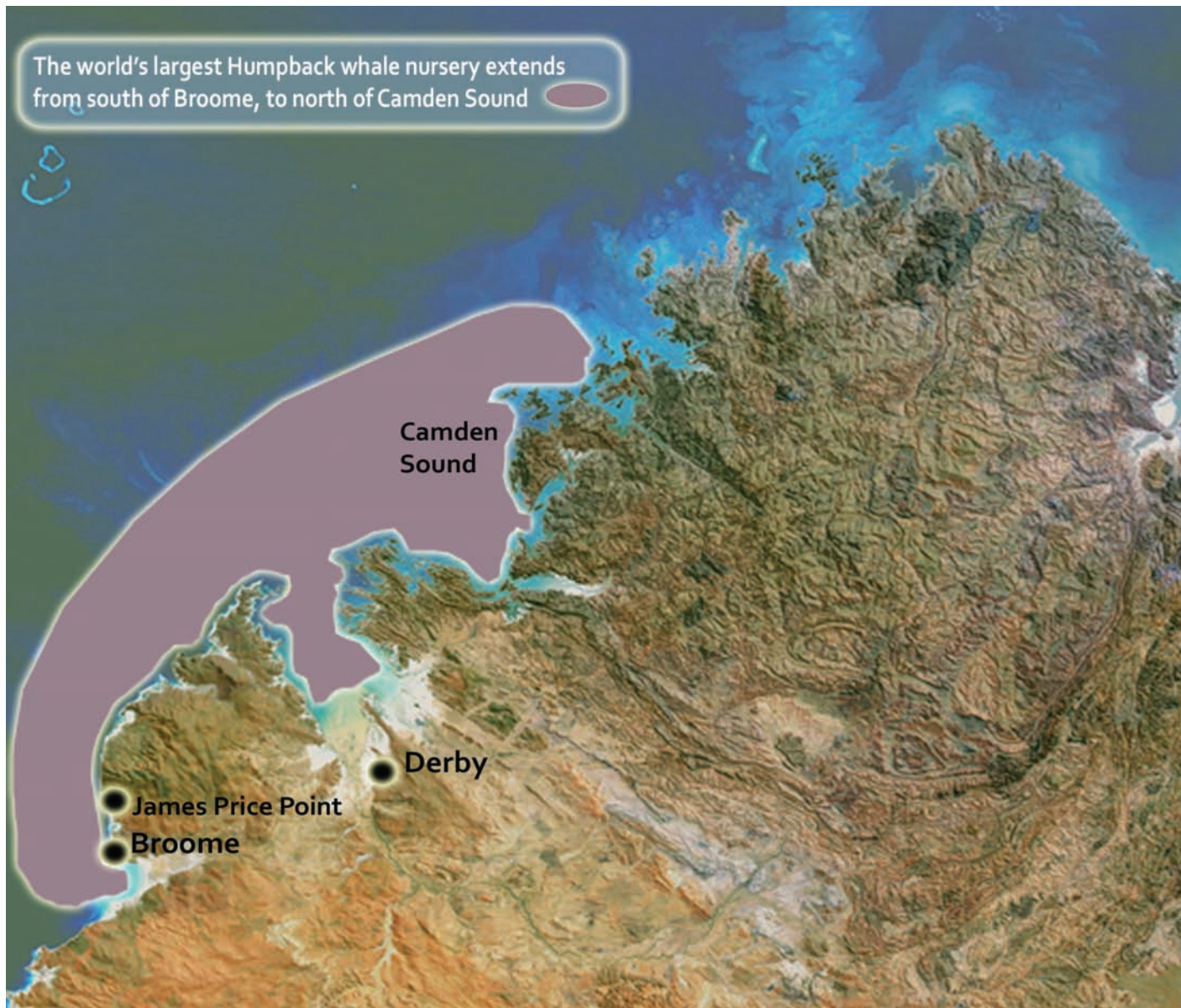


Figure 1: Illustration of Humpback whale calving, training and breeding grounds.

The Kimberley Region

The Kimberley Region, in northern Western Australia, covers 425,000 km². The region is sparsely populated, with an estimated 2008 resident population of 34,185, of which almost half are Aboriginal, living in the region's six towns and approximately two hundred discrete settlements. Almost all the Kimberley lands are either determined or claimed as native title.

Almost half the Kimberley's total population lives in Broome (15,386). The Kimberley is arid-tropical, combining spectacular landscapes and coastlines with a rich diversity of flora and fauna (Figure 2). The region contains internationally recognized geological formations (such as Purnululu and the Devonian Reef), large, wild river systems, isolated pockets of tropical rainforest, extensive savannah woodlands and desert.⁴ The region hosts one of the few remaining large intact tropical savanna areas in the world. The expansive, diverse and spectacular landscape is the core of the Kimberley Brand, which defines the region as an important Australian tourism destination.

The coastal and marine areas of the Kimberley are a significant part of the region's physical setting and character. The coastline varies from wide sandy beaches to mud flats, mangrove forests, coral reef systems and tidal creeks interspersed with stunning coastal cliffs. Some bays extend well inland and there are numerous offshore islands and coral atolls. The Kimberley coast has tidal variations of up to 11 metres, some of the largest in the world. The strong tidal flows result in dramatic effects such as 'horizontal falls'. Long stretches of isolated, lonely and dramatic coastline, offshore islands, coral reefs and marine life are major reasons for the Kimberley's growing attraction to tourists.⁵

The Kimberley has a strong and vibrant traditional cultural heritage built on at least 40,000 years of Aboriginal occupation, with colonial occupation since the late 19th century. Aboriginal culture and language remains strong and diverse, with at least 27 traditional language groups in the region.⁶ There are innumerable examples of rock art and other culturally significant sites. Aboriginal people participate extensively in the region's tourism industry. There is a strong demand for 'authentic' Indigenous tourism experiences, especially among international visitors.⁷ Colonial heritage includes pearling, pastoralism and mining, alongside a unique Australian multicultural society in Broome, where many people from diverse Asian backgrounds settled because of the peculiar nature and history of the pearling industry.

Because of these distinctive natural and cultural qualities, and their special tourism status, the Australian Federal Government has recently added the Kimberley region to its National Landscapes Initiative.⁸ According to the Government of Australia (2010a):

"National Landscapes aims to:

- Ensure tourism agencies, conservation agencies, infrastructure agencies, industry players and local government are collectively responsible for the conservation and enhancement of Australia's outstanding natural and cultural experiences for the future.
- Raise awareness and encourage visitation to these landscapes by Australia's global target market to achieve positive social, economic and environmental outcomes.
- Ensure that each landscape's natural and cultural experiences meet the target market expectations. "

It is reasonable to assume that development in the region that damages the landscape qualities and tourism potential runs counter to the aims of this initiative.

⁴ Kimberley Development Commission (2009a)

⁵ Kimberley Development Commission (2009a).

⁶ Fryer-Smith (2002)

⁷ Tourism WA (2010a)

⁸ Government of Australia (2010a)



Figure 2: Images of Kimberley landscapes. Source: Tourism WA Image Library (2010c)

The Broome and Kimberley 'Brand'

As a tourism destination, Western Australia is generally conceptualised as two regions, the South-west and the Kimberley/Broome region⁹. This highlights the central role Broome and the Kimberley play in creating Western Australia's tourism image and branding and attracting visitors to Western Australia. The special Kimberley brand has been built over an extended period of time through significant public and private investment. Any threat to the Kimberley and Broome experience will devalue the brand and undermine this investment.

Concept of Brand

A brand is a combination of psychological and experiential elements that determine the perception of a product, service or place in the minds of consumers.¹⁰ Branding aims to create a perception that a product/service/place will deliver an experience that not only matches the expectation but also makes that product/service/place unique and special [i.e. a promise]. Repeated consumption of a brand reinforces the consumer's psychological and experiential responses, leading to consumer 'loyalty'. Loyal visitors collectively become a 'segment' of consumers [i.e. the target market] who transmit trust that the brand delivers its promise.¹¹ Branding is about providing guidance through imagery and information that helps build brand recognition, loyalty, value, and market share.¹² Broome and the Kimberley are about experiences and adventure in the outback, the ranges, the gorges, the ocean, the waterways and waterfalls, and enjoyment of the extraordinary scenery.

Possessing a distinctive and appealing brand is vital for a destination's success in tourism.¹³ Broome and the Kimberley's achievement of a distinct and easily recognizable brand for something as complex as a region offering a multidimensional tourism product for a diverse range of market segments is extremely difficult.¹⁴ Recovery from damage to the brand could take considerable re-investment, effort and time.

The Kimberley Brand

The Kimberley brand is based mainly on a sense of its distance in time and space from western urban society, combined with its spectacular and expansive natural landscape (Figure 3).¹⁵ Aboriginal culture and the region's globally renowned coastal and marine areas are strong aspects of this brand.

The Broome Brand

Broome is a vital hub in itself and a gateway to the Kimberley hinterland and coast. The town's tourism appeal is its rich Aboriginal, Asian and European multicultural society, beaches, climate, hospitality and relaxed semitropical lifestyle (Figure 4 & Figure 5).¹⁶ Broome branding is based largely on imagery including pearls, pearling luggers, Chinatown, Cable Beach, bush tucker, colourful [contrasting] landscapes, camel rides at sunset on Cable Beach, Aboriginal art, crocodiles, festivals, luxury coastal cruising and luxury accommodation.

The branding is also influenced by Broome's slogan "Let yourself go", which can imply an invitation to take a visit, do what you enjoy [in Broome] or 'go to Broome'. "Let yourself go" also refers to the many activities available in Broome such as swimming, shopping, tours, fishing, walks/hikes, 4WD driving, viewing flora/fauna, visiting galleries and attending shows and performances. To this end, Broome is portrayed, and widely perceived, as a 'pure' holiday destination promoting a sense of relaxation.

The recent commercial success of the motion picture, *Bran Nue Dae*, has undoubtedly enhanced Broome's romantic brand as a holiday destination.

⁹ Trembath (2008)

¹⁰ Morgan et al (2002)

¹¹ Tourism WA (2007)

¹² Pike (2005)

¹³ Ekinci and Hosany (2006)

¹⁴ Pike (2005)

¹⁵ Trembath (2008)

¹⁶ Trembath (2008)



Figure 3: Images of the Kimberley. Source: Tourism WA Image Library (2010c)



Figure 4: Images of Broome. Source: Tourism WA Image Library (2010c)



Figure 5: Images of Broome. Source: Tourism WA Image Library (2010c)

Tourism in Broome and the Kimberley

According to the Kimberley Development Commission (2009a), the Kimberley currently “enjoys” a broad-based and diverse economy of which tourism is a significant part. The broader economic and social benefits of tourism as a means of diversifying regional economies are well recognised.¹⁷

Broome and Kimberley Visitor Profile

There is a range of available data on tourist visitation in the Kimberley. Given small sample sizes, Tourism WA provides estimated averages based on several years of data gathering (Table 1: Annual average number of holiday-leisure overnight visitors to Shire of Broome.)

Table 1: Annual average number of holiday-leisure overnight visitors to Shire of Broome.

Time frame	Origin			TOTAL
	WA	Interstate	International	
2001-2008 average*	60,000	66,000	35,200	161,800
2006/07/08 average!	128,300		36,200	164,500
2008 estimate+	-	-	-	260,990

*Source Tourism WA (2010a)

! Source Tourism WA (2009)

+ Source KPP Business Development (2009)

Data show that the main market for leisure holidays in Broome is domestic, half the visitors being from Western Australia, followed by people from interstate, who constitute a third of all visitors, with the remainder from overseas (Tourism WA, 2009). Domestic visitors tend to spend more money during their stay than international visitors (Table 2).

Table 2: Shire of Broome visitor overnight stay and expenditure.

Origin	Average Nights	Average spend per night (AU\$)	Total amount spent (AU\$ Mill)
WA	5.5	\$168	\$228
Interstate	9.0		
International	7.7	\$51	\$14

Source Tourism WA (2009)

Tourism WA (2009) data indicate that domestic visitors to Broome Shire tend to stay at resorts, hotels or motels (47% of all domestic visitors), while international visitors tend to stay at caravan parks, backpacker accommodation or hostels (68% of all international visitors). Domestic visitors were more likely to be an older age group than international visitors. The differences in accommodation preference probably account for the much larger average nightly expenditure of domestic visitors than of international visitors. The figures indicate that domestic visitors are the primary component of the significant tourism sector contribution to the Broome and Kimberley economy.

¹⁷ Dwyer et al (2004)

Kimberley Economic Contributions: Tourism and other sectors

Tourism is a major component of the diversified Kimberley and Broome economies, and a major employer. Government commissioned reports stated that tourism directly employs at least 12.5% of the Kimberley labour force, and at least 17% of the Broome labour force. However, closer scrutiny of Australian Bureau of Statistics (ABS) data shows the highly integrated tourism sector in Broome and the Kimberley directly includes employment in a range of industries including accommodation, cafes and restaurants, cultural and recreational services and personal services. Based on the ABS Kimberley labour force figures, the combined proportion of people directly employed in these industries is 27% of the Kimberley workforce.

This 27% proportion is considerably higher than the WA State Government-cited Kimberley direct tourism employment rate (Figure 6). About 20% of the Aboriginal labour force in the Broome/Dampier Peninsula region works in tourism operations, representing the largest source of private employment for Aboriginal people in the region. Mining employs 7.5% of the Kimberley labour force, being mostly Fly-in, Fly-out. Further development of tourism affords comparatively greater opportunities for local employment in the region.

The following chart demonstrates the diversity of the Kimberley economy. The importance of tourism for employment may be inferred from the figures for industries such as Retail, Accommodation, Cafes and Restaurants, and Cultural and Recreational.

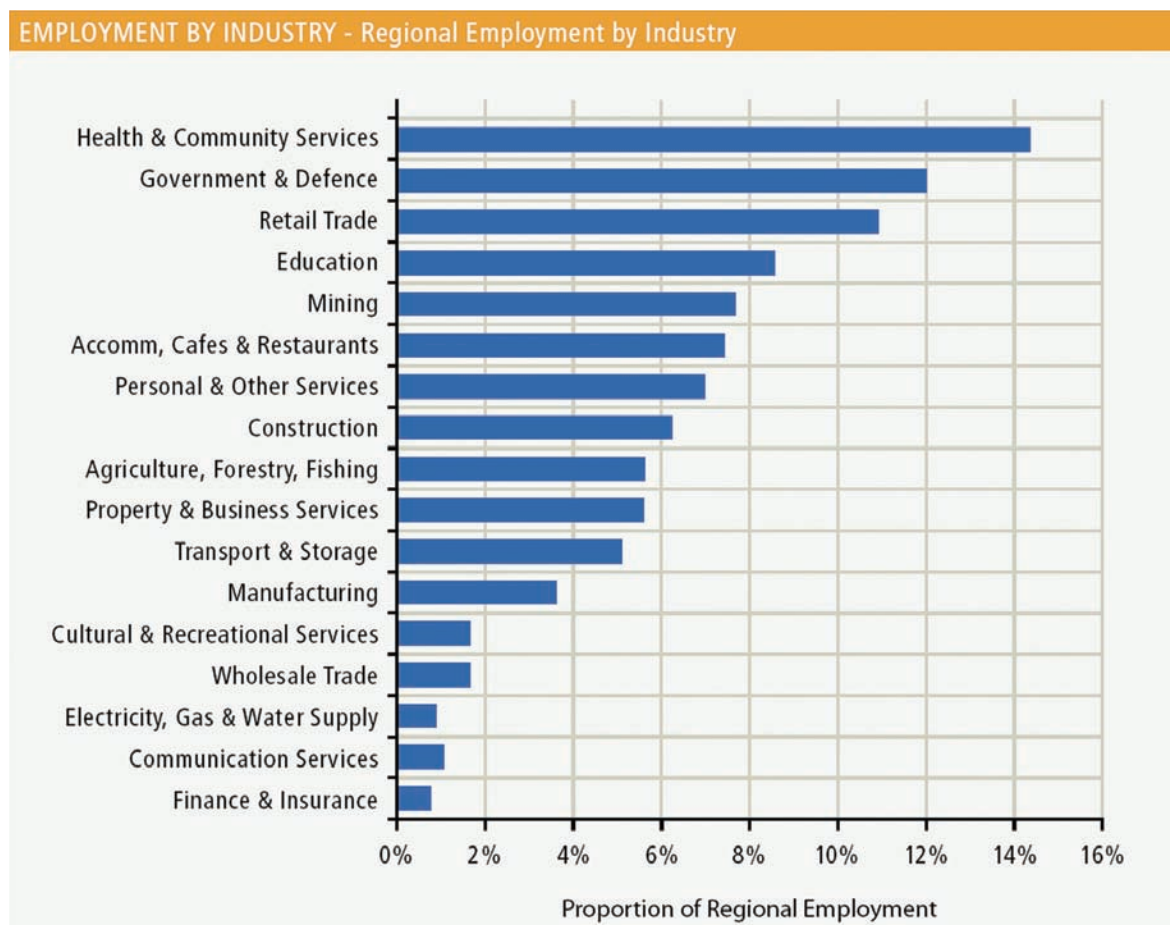


Figure 6: Kimberley employment figures by industry. Source: Kimberley Development Commission (2009)

Tourism indirectly contributes to employment in health and community services, education, personal and other services, construction, property and business services, manufacturing, wholesale trade, electricity, water and gas supply, communication services and finance and insurance.

While the mining industry contributes significantly in dollar terms to the gross regional product (Figure 7), in employment numbers it is less significant than tourism and related sectors. The 2006 Census data indicate that mining employed about 7.5% of the region's labour force, but only 0.1% of workers in the Shire of Broome. Mining, and in particular oil and gas, tend to be capital intensive but employ a relatively small, highly skilled workforce. Current mining operations in the Kimberley rely heavily on Fly-in, Fly-out (FIFO) workers. LNG plant construction and operation is a highly technical process and requires experienced and highly skilled FIFOs to form the bulk of the construction and operation workforce. As a comparative example, the Darwin LNG plant operation workforce is 75% FIFO¹⁸.

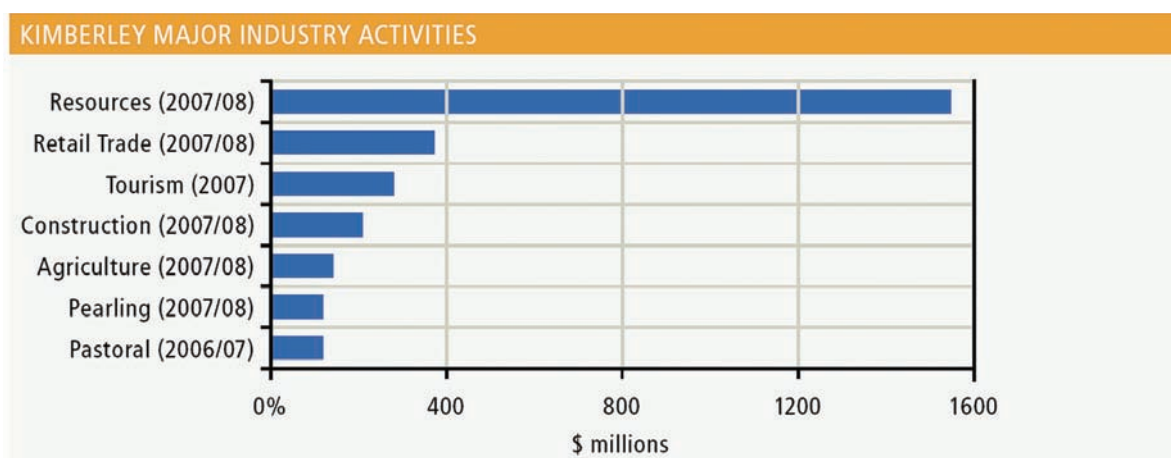


Figure 7: Kimberley gross regional product by industry. Source: Kimberley Development Commission (2009)

According to government estimates, of the mining revenue from resource sales generated in the Kimberley, at least 40% leaks out of the region.¹⁸ This is because of two main characteristics of the industry. Firstly, the strong reliance of mining on FIFOs who live outside the Kimberley and secondly, the necessity of sourcing equipment and supplies from outside the Kimberley because of the region's limited manufacturing base.¹⁸ Employment and increased economic leakage could be further affected by the WA Government's preference for a guest worker scheme for the Broome region, with a reported proposal to source workers on temporary guest worker visas from Sri Lanka, Indonesia and Malaysia.¹⁹

Regional output multipliers can provide a good indication of the economic benefit to the Kimberley region of investment in various industries. The following Input-Output table for the region presents the most recently available regional multipliers (Table 3). The table demonstrates that the output multipliers for tourism-related industries are significantly higher than those for mining, oil and gas in the Kimberley region.

¹⁸ Dept of State Development (2009)

¹⁹ Hannan (2010)

Table 3: Selected total output multipliers for the Kimberley region.

Resource extraction related industries	Multiplier	Tourism related Industries	Multiplier
Oil and Gas	1.18	Accommodation cafes and restaurants	1.51
Other mining	1.19	Sport gambling and recreation services	1.67
Services to mining	1.33	Libraries museums and the arts	1.57
		Personal services	1.5
		Wholesale trade, retail trade and repairs	1.68

Source: Sutherland and Johnson (2001)

These figures indicate that for every dollar increase in expenditure on tourism, there is an increase of between \$1.50 and \$1.70 in regional economic output. This is considerably higher than for oil and gas, where every dollar increase in investment increases the Kimberley's regional economic output by \$1.18. This demonstrates that development of tourism-related activities will deliver a relatively greater return on investment and subsequent regional economic benefits to the Kimberley region than oil and gas.

Reports concerning the proposed LNG hub, including records of past consultation with community representatives in the West Kimberley area, emphasised that people did not want "another Pilbara" ²⁰. Over more than four decades, the Pilbara iron ore mining and LNG processing 'boom' has achieved little to enhance Aboriginal socio-economic development in that region. ²¹

Tourism, on the other hand, is labour intensive, requiring higher numbers of employees relative to economic output and more opportunities for local employment. ^{22,23} KPP Business Development (2006, 2009) and the Kimberley Development Commission (2009b) both state that tourism is a key component of the Kimberley Region's economy. Kimberley tourism was worth about \$637million in 2008 and represented 35.8% of the region's economy. Tourism is cited in government reports as one of the largest sector employers in the Kimberley, directly employing at least 2,175 people of a total 2009 labour force of 17,324 (12.5%) and possibly up to 27% of the labour force. Tourism is also very important to Broome, representing about 64% of the total revenue generated in the town. At least 17% of the Broome labour force is directly employed in provisioning and servicing its tourism sector. ^{24,25} Furthermore, as a non-extractive activity, tourism can provide a sustainable economic base for the continuing development of the region while mining, oil and gas have finite life spans, with a peak production period followed by a steady decline in activity.

Tourism supports employment in a range of venture types. As an example, those based in Broome, as the region's major centre, are listed in Table 4.

Business Type	Number
Accommodation	40
Cafes & Restaurants & Takeaways	25
Attractions & Tours	20
Car & 4WD & Scooter Hire	13
Miscellaneous retail & visitor services	13
Air Charter & Tours	7
Art & Photography Galleries	7
Adventure Cruises & Boat Charters	6
Travel Agents	3
TOTAL	134

Table 4: Types of tourism related businesses in Broome.

Source: Broome Business Directory
<http://www.shireofbroomedirectory.com/>

²⁰ Dept of State Development (2009)
²¹ Taylor and Scamary (2005)
²² Tourism & Transport Forum (no date)
²³ Brereton et al (2007)
²⁴ KPP Business Development (2009)
²⁵ Kimberley Development Commission (2009)

Activities and Attractions

The Broome and Kimberley tourism product revolves around visitors experiencing a unique and natural landscape enriched by traditional Aboriginal culture and Broome’s ethnic diversity. The coastline and Cable Beach are also key drawcards to the region ²⁶. Table 5 demonstrates the range of activities and experiences available in the region.

According to Tourism WA, “The region offers the adventurous traveller with a wide range of unique wilderness and nature based experiences including spectacular gorges, lush waterfalls and over 400,000km2 of remote bushland. The Kimberley is also known for its coastline, including coral atolls and islands offering a wide variety of marine experiences. ... popular experiences in the region include cruising the pristine Kimberley coast, [and] engaging with the rich indigenous heritage in the area ...” ²⁷.

Table 5: Range of activities available in Broome and West Kimberley.

Coastal Activities	Outback Activities	Art, History & Culture
Fishing	4WD exploring & guided tours	Heritage trails
Scuba and snorkeling	Camping	Historic sites and buildings
Boat charter / fishing tour	River / Lake fishing	Museums and collections
Wildlife encounters [whales, turtles, birds, crocodiles]	Scenic flights	Art galleries, workshops & studios
Coastal luxury cruising		Pearling, mining and heritage tours
Nature & Wildlife Activities	Hospitality	Open air theatre, live performances, cultural displays
National park trails, lookouts, flora/fauna, scenery, camping	Outback / bush style tucker, billy tea, etc	Aboriginal talks, performances, displays and guided tours
Gorges, rivers and creeks, walking / hiking, overnight swagging, bird watching	Local produce [seafood, fruit, vegetables, beef, crocodile]	Historic / archaeological sites, rock art
Wildflowers & rare flora in parks / reserves / conservation areas	Cafes & restaurants	
Fauna viewing in the wild and in captivity	Pubs, bars and hotels	

Source: Broome Business Directory <http://www.shireofbroomedirectory.com/>

²⁶ Tourism WA (2010a)

²⁷ Tourism WA (2010a, p9)

Some of the main attractions and activities in the region are as follows

Aboriginal tourism

Aboriginal cultural tourism is a key component of the Kimberley and Broome tourism marketing image and brand (Figure 9 & Figure 10).²⁸ There are numerous accommodation, art and artefact and tour businesses owned and/or operated by Aboriginal entrepreneurs (Figure 8). These include about 30 market- or export-ready Aboriginal owned or operated tourism businesses employing at least 520 Aboriginal people in the Broome and Dampier Peninsula region.^{29,30} This represents about 20% of the West Kimberley Aboriginal labour force employed as of the 2006 census.³¹

According to Tourism WA, "The indigenous tourism offering in the Kimberley is also a key strength of the region. Around the West Kimberley (Broome/Dampier Peninsula), there is an extensive range of indigenous attractions and activities...."³² This includes a range of business operations based on accommodation, tours, art and cultural trails.

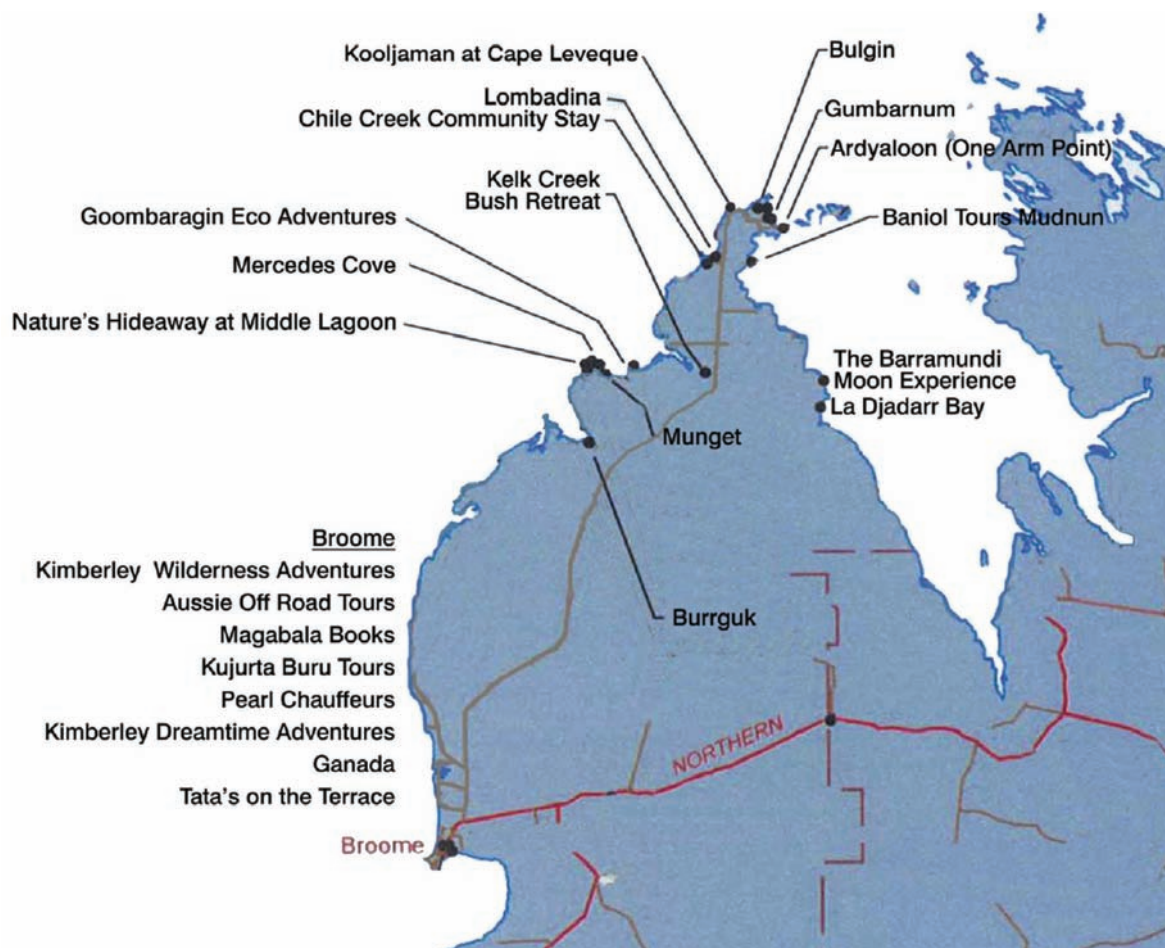


Figure 8: Examples of Aboriginal tourism operations in Broome and the Dampier Peninsula.

Source: KPP Business Development (2009)

²⁸ Tourism WA (2010a)

²⁹ KPP Business Development (2009)

³⁰ The Wilderness Society WA (2009)

³¹ Department of Education, Employment and Workplace Relations (2008)

³² Tourism WA (2010a, p14)



Figure 9: Images of Kimberley Aboriginal tourism products.

Source: Tourism WA image library (2010c)



Figure 10: Images of Kimberley Aboriginal tourism products. Source: Tourism WA image library (2010c)

Visiting the beach

Cable Beach is a core element of the Broome tourism experience and a fundamental part of the Brand (Figure 11). Construction of the proposed LNG plant and associated support base in Broome would result in increased heavy traffic (such as road trains) along a heavy-lift bypass road around the western fringe of the town of Broome, running between the town and the beach. It could also result in more numerous heavy-lift flights over the area, with associated noise, and an increased traffic of rig tenders and other supply boats offshore, within view of the beach. This could detract significantly from the relaxed beach experience.

Figure 11: Images of Cable Beach. Source: Tourism WA image library (2010c)



Figure 12: Images of adventure tourism in the Kimberly. Source: Tourism WA image library (2010c)

Cruising, flying and driving

Broome functions as a port for large visiting cruise ships and a base for smaller luxury cruise-boats north-bound along the Kimberley Coast. As a regional tourism 'hub' with an international airport, it also serves as a point of entry for the Kimberley region from which visitors can access various guided tours and commercial 4WD experiences. The region also has a significant self-drive visitor segment, which accesses the many off-road 'outback' roads such as the famed Gibb River Road. Many operators place a marketing emphasis on the idea of venturing into an 'unexplored wilderness' (Figure 12 & Figure 13).³³

In 2006, 30 vessels owned by 28 companies offering multiday cruises (3 to 18 days) along the Kimberley coast between Broome and Wyndham. These included nine fishing-type vessels, seven sailing vessels and 14 motor cruise vessels. The fishing vessels offered lower –end coast cruises targeted at the fishing and adventure market. Sailing vessels offered relaxed exploration-type experiences with on-shore excursions and a focus on luxury food and service. The motor cruisers (vessels up to 103m in length) targeted the high end luxury market with many vessels purpose-built for cruising the Kimberley Coast. Marketing of the cruises focused on concepts such as 'last frontier', 'untouched', 'wilderness', 'pristine', 'isolation', 'wild and remote' to attract customers.³⁴

³³ Scherrer et al (2008)

³⁴ Scherrer et al (2008, p27)

According to the report by Scherrer et al (2008, p109) on Kimberley coastal cruises and related activities:

“Because of the expedition cruise industry’s strong focus on the area’s natural, cultural and scenic amenities and its mobile nature, traversing the coast between Broome and Wyndham, coastal development, such as for example coastal gas and oil industry developments, may potentially have a very strong negative effect on the tourism product and experience.”

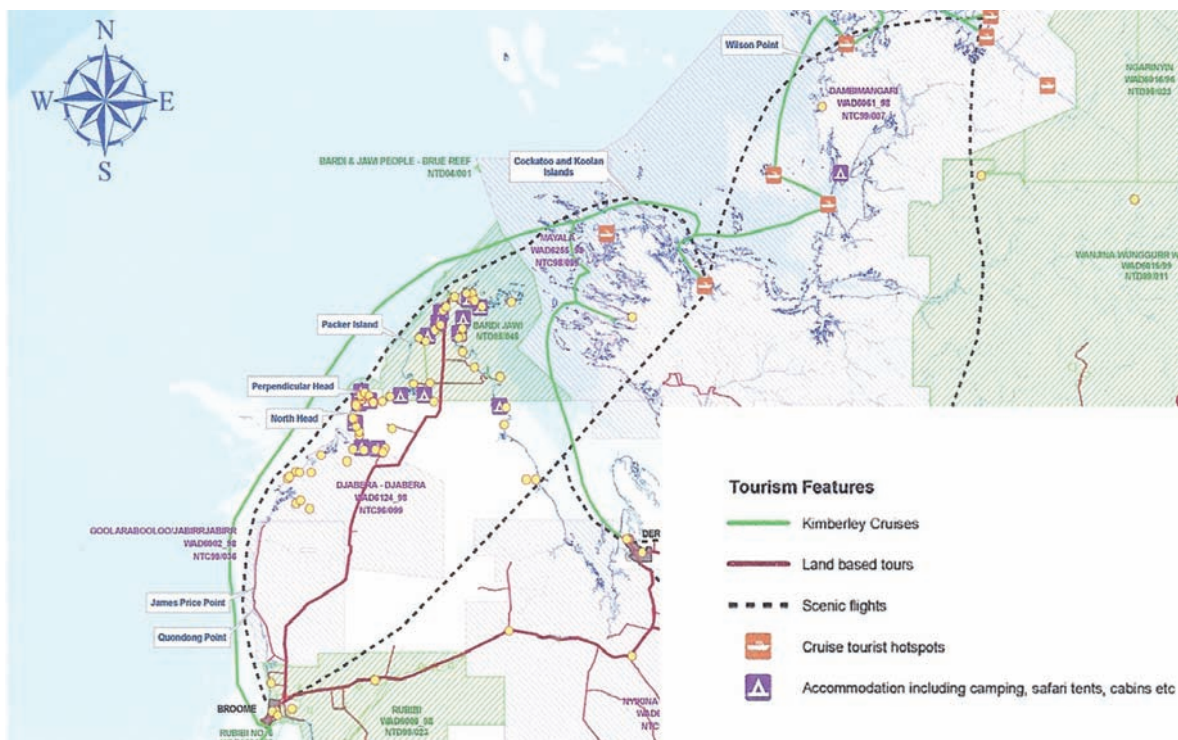


Figure 13: Map of tourism cruise, flights & tour routes Broome/Dampier Peninsula.

Whale watching

Western Australia, in particular the Kimberley region, is home to the largest population of Humpback Whales in the world. The Kimberley Humpbacks are growing to be a major tourism attraction within the region (Figure 14).³⁵ The Kimberley whale population, one of seven populations that inhabit the Southern Hemisphere, is made up of an estimated 16,000 to 20,000 individuals.³⁶ Every year the whales congregate along the Kimberley coast, an arc stretching from Broome and the Dampier Peninsula to Camden Sound where they mate, give birth and nurture and train their young.

The whales then migrate south from their ‘home base’ in the Kimberley region, along the Western Australian coast, until they reach their Antarctic summer feeding grounds.^{37, 38}

This annual congregation has created a burgeoning whale-based tourism industry on the Kimberley coast. There are currently around 10 different tour operators, including Aboriginal run businesses, offering focused whale-watching experiences. These do not include more general nature cruises that are likely to encounter whales. These enterprises run both live-aboard tours and day tours, although the majority run day trips. A number of whale-watching businesses have recently begun operation and several already established tour providers are now focusing more directly on marketing and offering specialised whale-watching tours.

³⁵ Scherrer et al (2008)

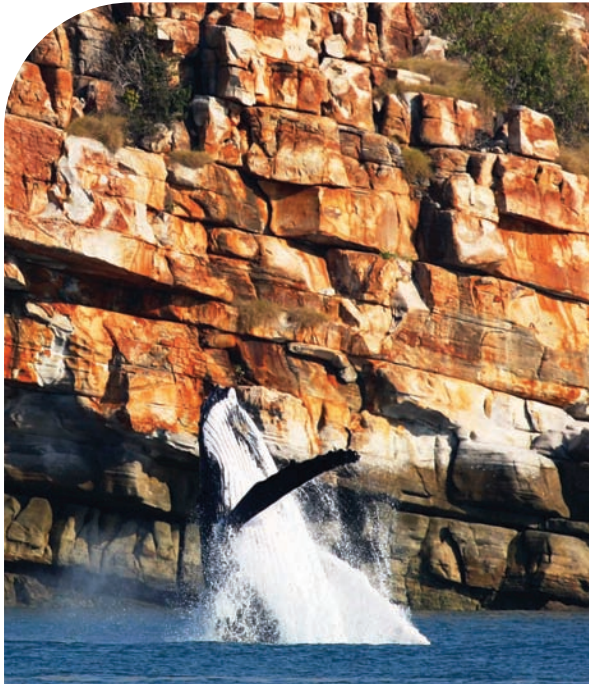
³⁶ Costin and Sandes (2009–)

³⁷ Jenner, et al (2001).

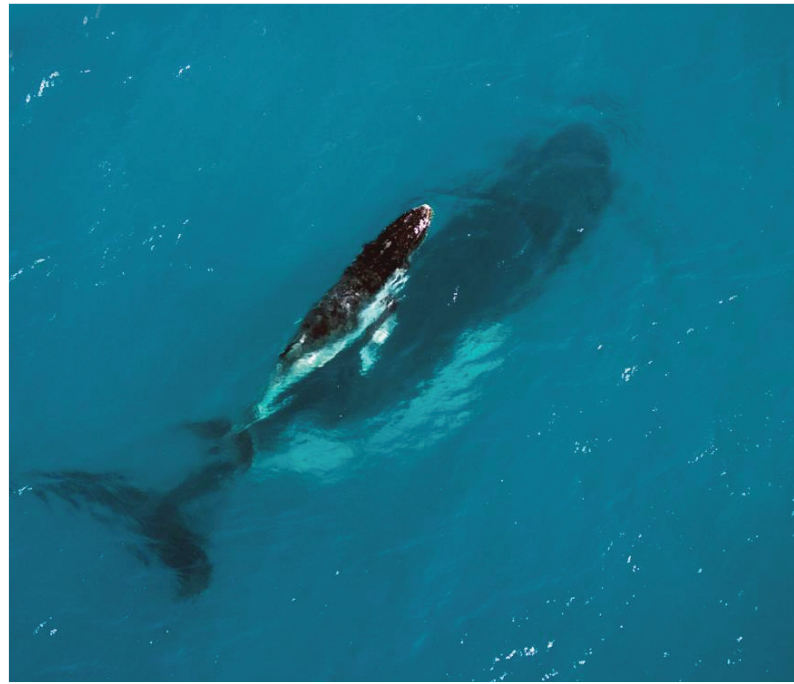
³⁸ Jenner, et al (2001)

This annual congregation has created a burgeoning whale-based tourism industry on the Kimberley coast. There are currently around 10 different tour operators, including Aboriginal run businesses, offering focused whale-watching experiences. These do not include more general nature cruises that are likely to encounter whales. These enterprises run both live-aboard tours and day tours, although the majority run day trips. A number of whale-watching businesses have recently begun operation and several already established tour providers are now focusing more directly on marketing and offering specialised whale-watching tours.

Figure 14: Images of humpback whales near the West Kimberley coast.



Kimberley Humpback whale breaching
Source: Annabelle Sandes, Kimberley Whale Watching



Kimberley Humpback Whale with calf
Source: Annabelle Sandes, Kimberley Whale Watching

Whale-focused tourism is a worldwide phenomenon and generates substantial economic benefit and increases awareness of the need for conservation. According to official figures, global whale-watching revenues have doubled over the past decade. **Approximately 13 million people participated in whale watching across the globe in 2008, generating total revenues of about \$2.1 billion.**³⁹ The economic benefits of wildlife tourism are particularly important to rural and regional economies, where the benefits can be shared amongst a relatively small population. For instance, Hervey Bay on the mid-north coast of Queensland has grown to become a beacon of whale tourism, attracting around 65,000 tourists per annum.⁴⁰ Stoeckl et al (2005) say that Hervey Bay's whale industry brings in AU\$11.5 million annually in direct tourist expenditure to the small regional centre.

In the same study, Stoeckl et al examined the renowned dolphin interaction site at Monkey Mia, on the Western Australian coast. A top figure of AU\$8.8 million was attributed to the dolphin interaction. Another study on the value of wildlife tourism was undertaken using a similar approach at Ningaloo Marine Park, to the north of Monkey Mia.⁴¹ Ningaloo Marine Park is the location of whale shark tours operating out of the small centres of Exmouth and Coral Bay. Recent participation numbers merged with results of the study⁴² show that over AU\$9.0 million in direct expenditure would be lost to the local economy if whale shark tourism ceased to exist. That study also demonstrated the flow-on effect of specific wildlife to destinations, as whale sharks were cited as important reasons for tourists to travel to the area, even outside the interaction season.⁴³

³⁹ Garrett (2010)

⁴⁰ Stoeckl et al (2005)

⁴¹ Catlin et al (2010)

⁴² Wilson and Smith (2009)

⁴³ Wood and Glasson (2006)

Recreational fishing

Commercial recreational fishing tours base their marketing of the experience on quality of fishing, emphasising the natural beauty of a 'pristine wilderness' in a remote setting. In addition, some operators promote secret or secluded fishing spots and good catches.⁴⁴

Two underwater marine features located west of the proposed LNG site at James Price Point are known locally as the "Peanut" – a ridge of about three miles long – and the "Puddle" – an oval depression about 3.5 miles long (Figure 15). Both features are shown on Australian Hydrographic charts, and local boat-based recreational fishers agree these features are important for recreational fishing out of Broome. The Peanut and Puddle are an optimum distance from Broome for a boating day-trip and, given their proximity and fishing productivity, they are especially valuable to the recreational fishing sector, including local charter boat operators. The impacts of the proposed LNG gas hub, such as seismic surveys, submarine [underwater] structures, shipping traffic including anchoring and associated service vessel traffic, are uncertain. They include potentially devastating ecological damage and reduction of marine life, which would be of great concern to local fishers, visitors and the local tourism industry.

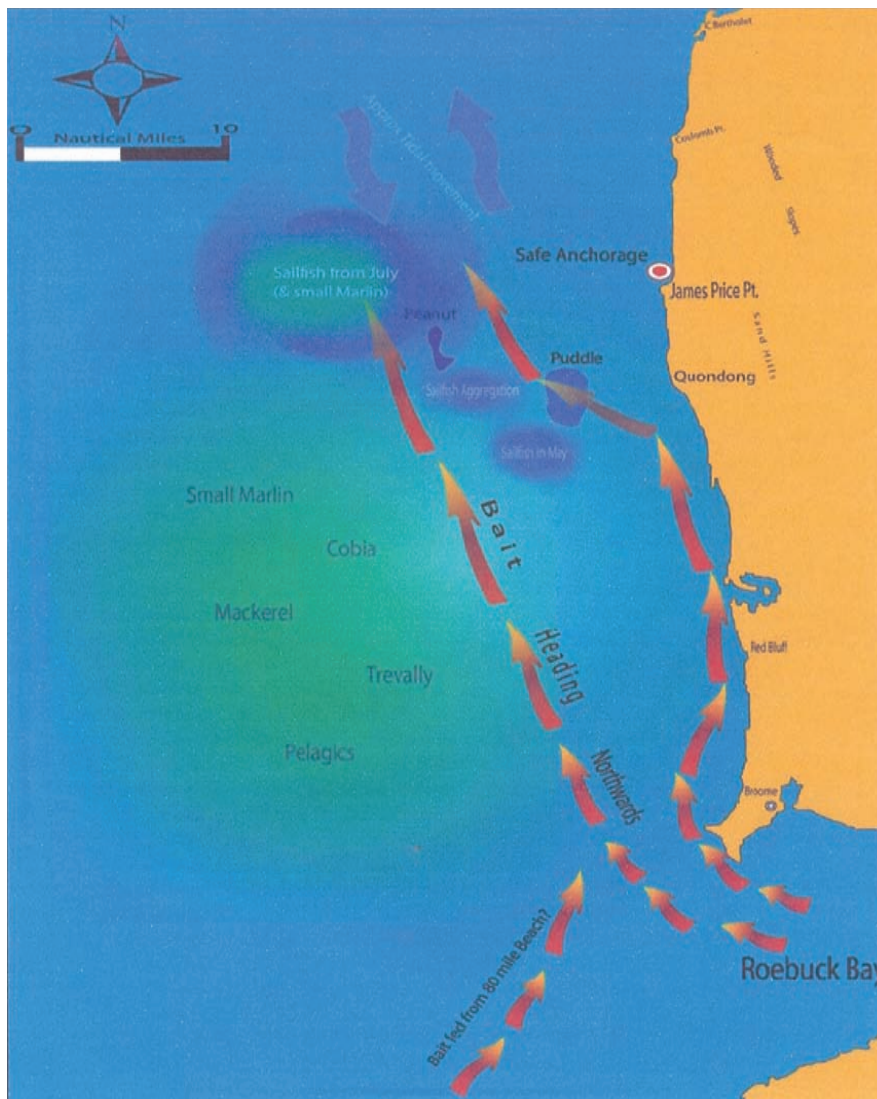


Figure 15: Map of recreational fishing locations near James Price Point.

Source: Wright G. and Pyke C. (2009, p13)

⁴⁴ Scherrer et al (2008)

Government Support and Funding

Information from the Kimberley Development Commission shows the following levels of financial support during 2008/09 for tourism-related enterprise development in the Kimberley (Table 6).

Table 6: Recipients of tourism related funding through the Kimberley Regional Grants Scheme for 2008/2009.

Project	Amount
Broome Visitor Centre, Promoting Indigenous Tourism Product,	\$42,500
Bardina, 'The Hub' Business Centre - Restaurant, Shop, Interpretive Centre / Artifact Gallery	\$150,000
Kununurra Visitor Centre, Technology Upgrade	\$20,000
Mangkaja Arts Resource Agency, Feasibility Study for Gallery for Mangkaja Arts Centre	\$19,800
Mowanjum Aboriginal Corporation, Mowanjum Art & Culture Centre,	\$200,000
Tourism Council WA, Kimberley Tourism Accreditation Mentoring Project	\$30,000
Tourism WA / Australia's North West Tourism, Promoting best practice Aboriginal Tourism in the Kimberley	\$50,000
Yawoorroong MG Group, Identifying recreation & tourism opportunities on new conservation areas,	\$30,000
Gumbarnun Aboriginal Corporation, Gambanan Tourism Infrastructure Project,	\$46,000
Shire of Halls Creek, Capacity Building Halls Creek Visitor Centre,	\$46,000
TOTAL 2008/09	\$634, 300

Source: Kimberley Development Commission 2010; Kimberley Regional Development Scheme 2008/09 recipients:

As a comparison, other Kimberley economic development schemes were investigated for government funding support. For example, the State Government will contribute \$220 million to the Ord River irrigation expansion project in the East Kimberley. Interestingly, the total output multiplier for agriculture (1.36) in the Kimberley (excluding grains and beef) is less than those for tourism.⁴⁵ This indicates that investment in tourism will provide a greater return per dollar to the Kimberley region than investment in irrigated agriculture.

The 2010/2011 WA State Budget indicated an allocation of \$111 million over five years to the Browse Basin Gas Precinct. In comparison, the TTF's budget summary report⁴⁶ indicates a total statewide contribution to nature based and cultural tourism related projects of \$73 million over the next four years. More than 80% of this allocation is for infrastructure and access improvements in WA national parks. Royalties for Regions will contribute \$20 million in new funds to improving national park infrastructure and road access. The Department of Environment and Conservation will receive \$40 million over four years for an ongoing statewide parks and tourist roads improvement program. Funding specific to the West Kimberley and Broome region includes a budget allocation of \$9 million over four years for development of a 'Science and Conservation Strategy' associated with establishment of a marine park in Camden Sound.

Tourism WA's budget allocation was \$61 million, more than half of which was allocated to marketing (\$34 million). Tourism WA's industry development allocation was \$8.5 million, reflecting the restructuring of the organisation toward a greater focus on marketing and fewer resources for product development.⁴⁷

There appears to be a substantial imbalance between government funding for tourism development and the greater level of funding for resource projects, whereas the relative employment benefits and economic return on investment suggest that tourism development should be favoured.

⁴⁵ Sutherland and Johnson (2001)

⁴⁶ TTF (2010)

⁴⁷ Tourism WA (2010d)

Impacts on the Kimberley and Broome Tourism Brand

Construction and operation of an LNG processing plant and supply base to support offshore oil and gas extraction could significantly detract from the Kimberley's tourism destination brand. This would mainly be through an increase in heavy industrial activity near Broome and on the Dampier Peninsula (both on- and off-shore). Development of an LNG industry in the region would inevitably result in visual impacts from air, land and sea, increased sightings and sounds of heavy haulage trucks, increased air traffic, increased sightings in and around Broome of LNG uniformed staff and industry vehicles, and congregations of off-work staff ('company town syndrome'), increased air pollution (from vehicles and from the LNG processing plant itself) and increased presence of commercially-attired business people at hotels and 'holiday' resorts. Increased industrial activity in the form of heavy industry and fossil fuel extraction and processing in the region presents an increased risk of oil spills and other industrial accidents.

The psychological and experiential brand elements associated with Broome and the West Kimberley are likely to diverge increasingly, causing dissonance or 'disconnection' in the minds of loyal and first-time visitors. This could adversely affect post-visit evaluation and, more importantly, downgrade Broome relative to alternative destinations that remain 'pure' holiday destinations, where there are no industrial developments. Brands elicit thoughts, emotions and psychological responses from customers. The all-pervasive changes that will inevitably come with the James Price Point gas hub, and a supply base in Broome, could alter the branding of Broome forever by changing the promise of what it delivers.

Comparative examples of destination impact

There is a paucity of research on the effects of oil and gas industrial developments on regions with established cultural and nature-based tourism activity.⁴⁸ The KPP Business Development (2009) study on the potential impacts of the LNG hub on tourism in the Kimberley provides a number of examples but only one, the Shetland Islands, is relevant to the Kimberley. Other examples it mentions are based on proposed developments that have not yet occurred. One example, centred on existing Alaskan oil and gas industrial development, relies on the regional tourism promotional material to show that wilderness qualities and nature-based tourism have not been affected, rather than on actual research data. It should be noted that the KPP tourism impact report, which was commissioned as part of the Strategic Assessment for the Kimberley coast LNG development, does not include the expansion of support base facilities in the town of Broome, and relies on a very small sample of tourists to the region.

Shetland Islands

The Shetland Islands example is of the expansion of an offshore oil industry with construction of a land-based processing plant and support base in an isolated region with a pre-existing and growing nature-based and cultural tourism market. The most significant element of the development was the construction of a large oil terminal at Sullom Voe on the Shetland Islands mainland, and a large supply base in the town of Lerwick, the Shetland Islands' main town and administration centre.⁴⁹ **The oil terminal processed oil received through two pipes from the North Sea offshore oil rigs in the region. According to the example provided, this resulted in a catastrophic decline in tourism activity where "nearly all pleasure tourism stopped" for ten years.**⁵⁰ This happened despite careful and relatively successful efforts to limit the impacts of the oil terminal and supply base on local traditional activities, and limit development to that which was in the national interest. The decline in tourism was mainly a result of the shortage of accommodation available for tourists, most of it having been taken up by oil industry workers. There were also significantly increased accommodation operation costs in the region. Butler and Fennell's (1994) study noted that the director of Shetland Tourism considered that advertising to tourists at the peak of oil production during the 1970s was a waste of time because of the lack of accommodation. Interestingly, the accommodation providers benefited from the year-round presence of oil industry workers during the peak operation phase, but suffered when the oil industry in the region went into decline and the number of workers was reduced. At this point there were virtually no tourists to replace the oil industry workers, as the region was perceived as an industrial area.⁵¹

Given the "highly integrated" character of tourism in the West Kimberley,⁵² a lack of accommodation for tourists would have direct negative impacts on all other tourism related business (transport, tours, retail, food, cultural and art products). Given the significance of tourism to Broome and the Kimberley as an economic contributor and employer, this could have significant deleterious economic and social impacts on the region.

⁴⁸ Butler Pers. Comm. (2010)

⁴⁹ Butler and Fennell (1994)

⁵⁰ KPP Business Development (2009, p33)

⁵¹ Butler and Fennell (1994)

⁵² KPP Business Development (2009)

It is also worth noting the finite life span of oil and gas development, based on resource availability and market viability, in contrast to a potentially long term, sustainable tourism industry.

LNG processing plant

The physical landscape of James Price Point and hinterland is flat to gently undulating sand plains with uniformity of low-lying vegetation (Figure 16 & Figure 17). This means that large scale development would be visually dominant from established marine and terrestrial viewpoints and routes. For example, unsightly elements would easily be seen, night and day, from cruise ships visiting Broome, adventure cruise ships travelling to/from the Kimberley coastline, 4WD's venturing along the Broome–Minarriny (Quondong) Road, scenic flights over the Dampier Peninsula and land tours within the vicinity of James Price Point. The necessity for 24-hour operations requires brightly lit facilities, enhancing the visibility of the plant at night.

James Price Point is a popular recreational spot for Aboriginal and other locals, and tourists. The offshore area is known for its world-class game fishing. The LNG precinct would, for the life of the project, restrict public access to highly valued recreational areas⁵³.

An exclusion zone would also prohibit the annual Lurujarri Heritage Trail walk. The Lurujarri Heritage Trail is part of the Heritage Trails Network, which was jointly funded by the Commonwealth and Western Australian Governments under the Commonwealth/State Bicentennial Commemorative Programme, to enhance awareness and enjoyment of Western Australia's natural and cultural heritage. The 80km walk trail starts at Minarriny and ends in Broome.⁵⁴

The construction of the LNG plant over several years will employ approximately 5,000 mostly FIFO workers, while the operational phase will host about 500 mostly FIFO workers over 30-40 years. This figure includes the summed part-time, casual and full time workforce over the construction period and operational life of the project. While the workforce may be accommodated on site at James Price Point, Broome functions as a hub for the region, providing entertainment, food and recreation. An influx of workers into Broome and surrounding recreational areas will alter the defining character of the town and region, forever damaging its tourism appeal.⁵⁵



Figure 16: Satellite photo of James Price Point. Source: Google Earth.

⁵³ Northern Development Taskforce Final Site Evaluation Report (Dec 2008)

⁵⁴ Lurujarri Heritage Trail, Retracing the Song Cycle from Minarriny to Yinarra Heritage Council of WA http://tourism.heritage.wa.gov.au/ht_pdf/Lurujarri.pdf

⁵⁵ Dept of State Development (2009)

⁵⁵ Northern Development Taskforce Final Site Evaluation Report (Dec 2008)



Figure 17: Aerial view of James Price Point at low tide, note the cultural walk trail along the beach / 4WD track.

Browse Basin supply base

Broome was recommended as a potential site for a supply base to support the Browse Basin project and the construction and operation of the LNG processing plant. This was based on its top ranking according to a matrix of factors.⁵⁶ Broome was recommended because of the existing infrastructure and services currently supporting offshore exploration, including the only deepwater port on the Dampier Peninsula. In order to support LNG plant construction and processing and off-shore operations, the current supply base would have to be considerably expanded. Concerns raised by government stakeholders such as the DPI included:

“... adverse impact[s] on tourism were seen as key issues against a supply base. The population impact and FIFO personnel was seen as potentially adverse. There was fear of affecting the “sense of place” and Broome becoming an industrial town. This was being considered with respect to Broome being one of the three known tourism marketing points for Western Australia.” (Worsley Parsons, 2009, p57).

There were also concerns about noise pollution occurring 24 hours a day from helicopter operations and maintenance and related industrial activity at the supply base. Increased industrial activity also raises the risk of spills of contaminant (such as fuel and chemicals) and other polluting events.

The WA Government has recently announced a preference for Point Torment near Derby.⁵⁷ This was ranked second in suitability based on a matrix of factors.⁵⁸ There are some concerns regarding the navigability of King George Sound, where Point Torment is located, owing to strong tidal currents restricting access combined with multiple oil and gas users and requirement for 24/7 supply base

⁵⁶ WorleyParsons (2009)

⁵⁷ Mercer (2010)

⁵⁸ WorleyParsons (2009)

operations. As Point Torment is currently undeveloped, establishing a supply base would require extensive capital investment. The current lack of navigation aids for shipping, that restrict movements to daylight hours on a slack tide, would also require significant investment to enable 24 hour operations. They also noted that the topography of this area and subsequent required supply base layout could create significant additional operational and safety constraints due to a requirement for double handling of all cargo.⁵⁹ Finally, WorleyParsons (2009, p46) noted that “no specific related study has been done that assesses the suitability of Point Torment for construction of a supply base”. Interestingly, companies involved in oil and gas exploration and production in the region have previously indicated a preference for a supply base at a location with pre-existing port facilities (such as Darwin or Broome) or near James Price Point.⁶⁰

In the event that a supply base is built at Point Torment, while Derby is the nearest town, Broome, is the region’s gateway and tourism icon. Broome would potentially serve as a venue for rest and relaxation for supply base workers, as for the LNG plant workers. An influx of workers into Broome would, as previously noted, significantly alter the relaxed tourism ambience of the town.

A supply base is a facility that supports the logistical requirements of delivering oil and gas to the market. A supply base operates 24 hours a day and requires brightly lit facilities, including large lay-down areas, warehouses, support buildings and amenities with port and nearby airport access. A typical supply base requires the following:⁶¹

- Lighting for 24 hours operation;
- Roads to allow for heavy road trains in all weather scenarios;
- Container storage;
- Airport for fixed wing and heavy lift helicopters;
- Laydown areas for kilometres of piping, casing and other equipment
- Warehousing;
- Offices;
- Access to a wharf with:
 - o heavy lift capacity/stevedoring,
 - o bulk liquid capacity,
 - o water and fuel bunkering,
 - o deck to support 150-250 tonne crawler cranes and turning circle for road train;
- Wash-down area including customs and quarantine capability;
- Bulk liquid storage for:
 - o Diesel fuel,
 - o Drilling muds,
 - o Aviation fuel,
 - o Chemicals,
 - o Water;
- Communication services;
- Power plant, if supply not available from existing grid;
- Waste disposal/treatment facility including for hazardous materials;

⁵⁹ WorleyParsons (2009)

⁶⁰ Mercer (2010)

⁶¹ WorleyParsons (2009)

A Broome base to support expanded oil and gas-related construction and operation could require, among other things:

- a heavy lift bypass road around the western edge of the town to access the port,
- a new jetty for exclusive use of the oil and gas industry, adjacent to the existing jetty
- 100 ha expansion of existing industrial land near Broome airport to cater for heavier industry.
- 100 ha expansion of industrial area near Broome port to cater for heavier industry

Expansion of the oil and gas support base in Broome would result in restriction of public access to the port area (currently a popular spot for tourist visitation) for "safety and security purposes". Worsley Parsons (2009) noted that these upgrades would result in increased safety risks to the public accessing the existing boat ramp, restaurant, walkway and fishing platform in the port area. These facilities may then have to be relocated.

The current heavy-lift helicopter flights out of Broome are limited to between 6am and 6pm to reduce excessive noise pollution and the resulting complaints from Broome residents. An expanded supply base operation to support the oil and gas plant construction and operation will require 24-hour helicopter operations and maintenance – year round.

Location of the supply base at Broome as the top ranked site could result in the town being effectively surrounded by two 100ha heavy industrial areas to the north and south and a heavy lift road frequented by road trains to the west, between the town and Cable Beach (Figure 18). The industrial areas would operate 24 hours a day and be very brightly lit at night. Inevitably, this will alter the character of the town, shifting its image from a place for relaxation and nature and culture-based recreation to that of heavy industry and frenetic, large-scale industrial activity.

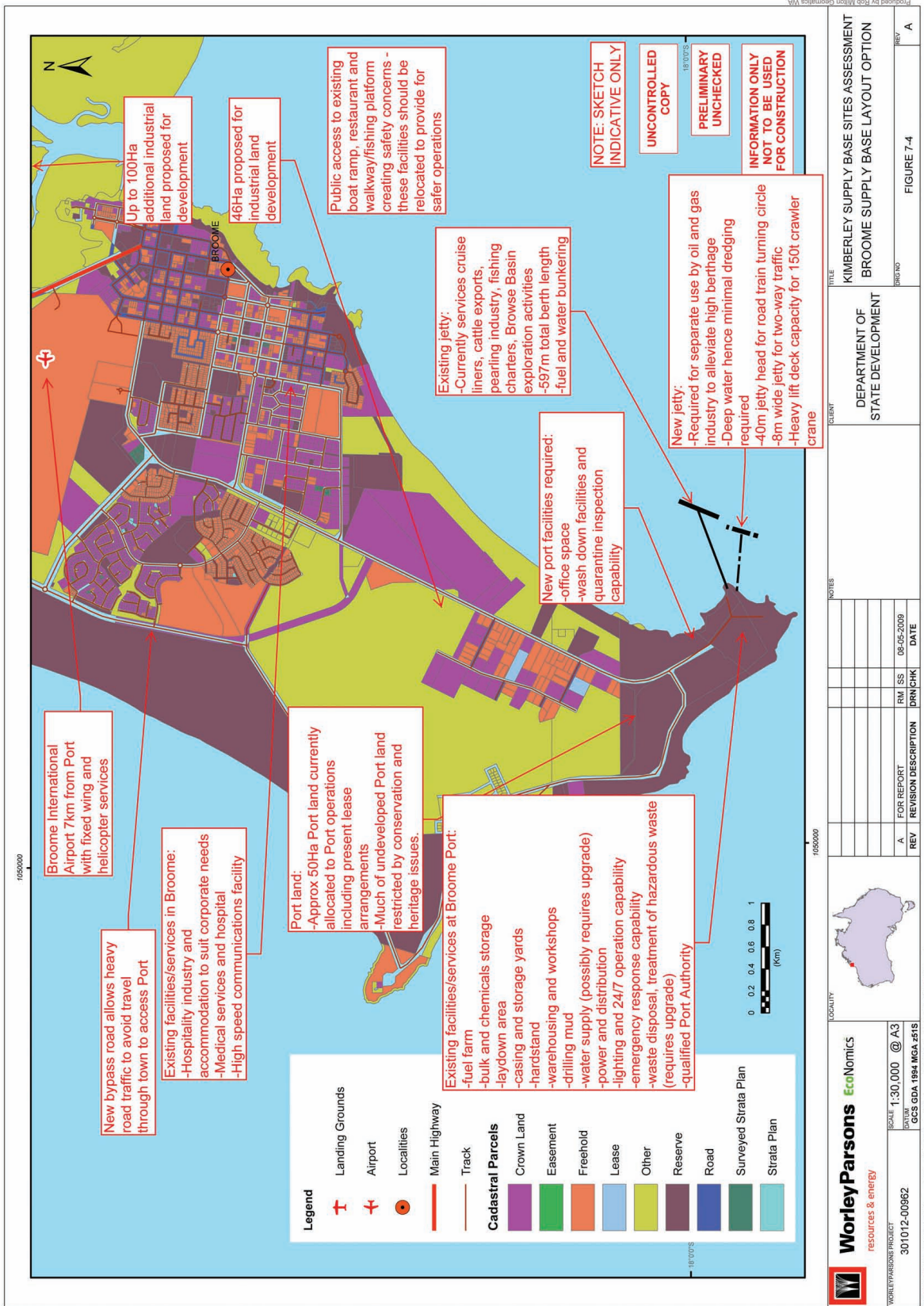


Figure 18: Concept map for proposed supply base in Town of Broome. Source: Worsley Parsons (2009, p38)

Kimberley Tourism Development Priorities

The following development priorities were outlined by Tourism WA (2010a) in the report, *Australia's northwest: tourism development priorities 2010-2015*. They are considered to be important to the growth of tourism in the region.

Relocation of Airport

Both the tourism and oil and gas stakeholders favour relocation of Broome airport away from the town to allow for expansion of capacity. This would allow an increased number of international flights directly into Broome, ideally from an international 'hub' such as Singapore. The oil and gas industry is keen to relocate and expand the airport to allow for larger heavy lift aircraft enabling transport of heavy equipment to service the industry.

Sealing of Some Roads

Completion of the sealing of the Broome to Cape Leveque Road is considered a high priority by Tourism WA, who recommends addressing this in the next 1–5 years. The report stresses the need to retain a significant number of roads unsealed (especially the Gibb River Road). Retaining unsealed roads in the region is considered essential to maintaining the region's remote wilderness brand and outback experience. Sealing of the Broome to Cape Leveque Road to all-weather standard would vastly improve access to the numerous Aboriginal tourism operations on the Dampier Peninsula. This would need to be done in conjunction with management planning to ensure that increased numbers are properly catered for and do not cause unacceptable environmental or cultural damage.

Accommodation

Tourism WA sees "the further opportunity to develop niche accommodation stock in the region... and the opportunity to develop diversified indigenous focused accommodation on the Dampier Peninsula north of Broome..."⁶² This vision is based on the significant number of market-ready products that, with support, could be upgraded to export-ready standard to better cater for international tourist demand.

Attractions and Activities

Aboriginal tourism products are a key strength of the Kimberley region, particularly around Broome and the Dampier Peninsula. Tourism WA (2010a) states that there is a need to build capacity in existing establishments to meet the demand from international visitors and better cater for their needs and expectations. Facilitating the development of Aboriginal product to export-ready standard is considered a high priority for the next 1-5 years.

⁶² Tourism WA (2010a, p13).

Broome and the Kimberley Tourism Potential

Based on Butler's tourism lifecycle model, the Broome area is considered to be in the consolidation phase while the rest of the Kimberley is in the developmental phase.⁶³ This means that the tourism sector in Broome, as a major contributor to the regional economy, is seen to have high potential for further development of new products and improvement of existing products. This will enable tourism in Broome and the Kimberley to grow and consolidate its significant economic contribution if managed carefully. Improvements would be likely to include increased whale tourism ventures, Aboriginal cultural tours and marine adventure cruises. However, the tourism destination life cycle model highlights that the consolidation phase could be followed by a gradual or sharp decline in tourism if appropriate destination planning and management strategies are not put in place. A decline in tourism in this famous region is likely should an LNG industry be established on the Kimberley coast, incorporating a processing facility at James Price Point and an extensive supply base.

Tourism Priorities

Growth of tourism as a sustainable nature- and culture-based activity could be strongly facilitated by one or more regional development priorities outlined below.

Establishment of a Marine Park

In achieving a representative marine reserve system for Western Australia, DEC is considering establishing additional Marine Parks. Areas along the Kimberley coast, near Broome, are likely to be included.⁶⁴ Establishing Marine Parks in the Kimberley region will provide a focus for tourism and result in associated benefits. Numerous studies over the past two decades have demonstrated that protected areas such as Marine and National Parks contribute significantly to the national, state and regional economies in Australia through the generation of tourism activity and the related expenditure.⁶⁵ A report⁶⁶ on a proposed marine park for the South-west region of Western Australia cited strong evidence that marine parks not only have ecological benefits such as increased biomass within no-take zones, they could also significantly boost tourism activity and its contribution to the regional economy. Marine parks can also enhance the cumulative fishery harvest and generate economic payoffs by functioning as a buffer against environmental shocks.

Valuations of The Great Barrier Reef Marine Park have demonstrated significant economic contributions at varying scales. A valuation based on direct tourist visitor expenditure indicated a direct annual contribution of about AU\$776 million to the region.⁶⁷ A more recent valuation by Access Economics gave a broader gross area product value for the marine park of AU\$4.5 billion.⁶⁸ A valuation of the Ningaloo Marine Park coastal area, with similar annual leisure tourism numbers to those of Broome, demonstrated that tourist expenditure directly contributed AU\$127 million annually to the regional economy.⁶⁹ The direct expenditure figures are conservative estimates of economic contribution as they do not include secondary local (multiplier) economic effects of that expenditure. Research into the value of marine and other protected areas for tourism consistently demonstrate significant economic contributions to local economies.

Establishment of a large Marine Park in the West Kimberley coastal and marine region could contribute significantly toward tourism growth in the region. If the Park were large enough, it could serve as a focal point for tourism activities and marketing, while providing a basis for the conservation of important marine and coastal habitats. A Kimberley Coast marine park could complement promotion of the region as a pristine whale-watching destination. At Ningaloo Marine Park, by comparison, the park functions as both a marine conservation and protection area and a major tourist attraction. This is complemented by an effectively managed industry for swimming with whale sharks.

⁶³ Tourism WA (2010a)

⁶⁴ Scherrer et al (2008)

⁶⁵ Hughes and Carlsen (2009)

⁶⁶ Allen Consulting (2009)

⁶⁷ Driml and Common (1995)

⁶⁸ Access Economics (2007)

⁶⁹ Carlsen and Wood (2004)

The authors note a recommendation on the Kimberley from the WA Marine Parks and Reserves Authority, the statutory body charged with the responsibility for protecting WA's marine environment:

"In relation to the Kimberley, the Authority has proposed to the Minister for Environment that the Government urgently protect the Kimberley through the establishment of a multiple use marine park over the whole of State waters in the Kimberley with the full reservation of currently identified iconic areas by an appropriate zoning system in the broader multiple use marine park."⁷⁰

Relocation of airport with links to Singapore "Hub"

The proposed relocation of the Broome airport to enable expansion of capacity would afford excellent opportunities for increased international tourism numbers to the region, especially with links to Singapore as an international hub of travel. Enhanced access to international tourism markets would help grow the relatively smaller number of international tourists to the Kimberley region. Enhanced international accessibility to the region could assist in growing components of the tourism sector in demand by international tourists, such as Aboriginal owned and operated businesses.

Enhanced accessibility through more frequent and affordable flights would require careful management to avoid Broome becoming a 'mass tourism' destination. Rapid and unmanaged expansion of tourism could result in erosion of the Brand and experience of the region as a remote, unspoilt and a place for relaxation. This could be avoided through careful and strategic planning at the regional scale. Such planning has occurred in the Ningaloo Coast region in response to growing visitor numbers, with a view to retaining the regional tourism brand and various nature based experiences.⁷¹

Sealing of Cape Leveque road

An all-weather sealed road to Cape Leveque from Broome will improve access to the Dampier Peninsula. This would increase tourist numbers and help boost business in the area, including the cluster of Aboriginal operated accommodation and tour enterprises. Sealing of the road could reduce the seasonality of visitation, expanding the portion of the year when tourists can access the Dampier Peninsula and providing an expanded market in terms of both visitor numbers and length of season.

Tourism Product Potential

Improving access to the region through an expanded airport and sealed roads, together with the establishment of a marine park and support for further development of tourism products, could ensure that tourism to Broome continues to grow while the West Kimberley consolidates as a tourism destination. This could be facilitated by the development of niche tourism products unique to the West Kimberley region.

Whale watching

The presence of Humpback Whales in the coastal and marine areas of the West Kimberley presents good opportunities for further expansion of a niche tourism activity. This would be greatly facilitated through improved and carefully managed access based on an expanded airport, sealing of roads, development of tourism accommodation in the region and establishment of an adequately defined marine park. As a hub for the region, Broome has a number of valuable features that make it unique, providing an advantage over other whale-viewing locations in Australia. Broome and the Dampier Peninsula have the infrastructure and tourist base for the continued growth of whale-focused tourism. In addition, the region is known for its remote wilderness qualities while the climate is conducive to a comfortable experience with relatively mild sea conditions and warm weather. Besides the setting, it is particularly well placed to offer distinct Humpback Whale experiences. As noted by Duffus and Dearden (1990), wildlife tourism needs the regular occurrence of wildlife over a manageable area. Given the reliability of whales in the Kimberley, whale tours are consistently available from June to August. Moreover, the whales are at the destination of their migratory route, allowing for a more localised experience, as opposed to the generally fast-moving migratory viewing on offer further down the coast.

⁷⁰ MPRA (2009)

⁷¹ CSIRO (2010)

Most importantly, and perhaps providing the greatest edge over other whale-watching destinations, this is the world's largest calving area, where tourists may encounter a calf [i.e. born and raised in the Kimberley]. As Tremblay (2002) states, people are drawn towards megafauna such as whales, and human characteristics such as parenting are particularly sought in wildlife interactions. Consequently, the attraction of encountering whale calves could conceivably define the brand for Kimberley whale-watching. Accordingly there is significant potential for continued growth of this nature-based tourism sector in the West Kimberley.

Tourism marketing in Western Australia is largely based on its natural resources, and Western Australia's marine wildlife tourism attractions constitute a significant part of this image formula. For instance, Penguins at Safety Bay near Rockingham, Bunbury and Monkey Mia dolphins, Whale Sharks in Ningaloo Marine Park and Whales at key locations along the WA coast are given considerable attention. The Shire of Broome is ideally positioned to extend this chain of wildlife destinations with whale watching. Not only does it have the largest population of Humpback Whales at its 'front door', it is also their calving area, allowing rare opportunities for close encounters with juveniles. Wildlife tourism can generate significant income for small regional areas and the development of the whale watching in the Broome Shire would be no exception. Furthermore, it would provide indirect benefits to the tourism brand of the Broome Shire and to Western Australia.

Aboriginal tourism

Further development of the Aboriginal tourism industry in Broome Shire and the West Kimberley is identified as a significant current focus for Tourism WA.⁷² According to recent research by Tourism WA, 29% of visitors holidaying in WA took part in some form of organised Aboriginal tourism experience. Interestingly, 62% of all visitors, and 71% of international visitors, were interested in participating in an Aboriginal tourism experience.⁷³ This indicates a strong demand for Aboriginal tourism experiences that is not currently met by the supply. Increased accessibility for international tourists could help to drive development of this industry. Expansion of the Broome airport and sealing of key roads combined with support to develop and upgrade tourism products and accommodation could ensure Aboriginal tourism continues to grow and thrive in the region.

A recent joint media release⁷⁴ by Federal Tourism Minister Martin Ferguson and Minister for Environmental Protection, Heritage and the Arts, Peter Garrett, stated that:

"Tourism has great potential to provide the sorts of jobs and business opportunities that can deliver economic independence for regional Indigenous communities, particularly here in the Kimberley which has the highest concentration of Indigenous tourism experiences on offer anywhere in Australia. Grasping those opportunities is the key to closing the gap between Indigenous and non-Indigenous Australians ..."

Aboriginal tourism is seen as a way of reducing welfare dependency and strengthening cultural identity among Aboriginal people, especially the young, as well as being a means of positioning Australia as a culturally distinctive destination.⁷⁵ Further development of Aboriginal Tourism products can provide benefits through:

- Promoting cultural and social strength and economic independence;
- Promoting cross-cultural awareness and understanding, and changing negative mainstream stereotypical views about Aboriginal communities;
- Supporting traditional culture through presenting aspects of it to a wider audience;
- Building Aboriginal people's capacity to manage cultural and natural landscapes and biodiversity;
- Fostering a wide appreciation and respect for Aboriginal cultural heritage and landscapes.
- Fostering Aboriginal pride in showing the rest of the world a living culture.⁷⁶

Given the presence of numerous market-ready enterprises that could be upgraded to export-ready, together with a growing tourism demand, further development of authentic, quality Aboriginal tourism experiences is likely and will enable the region to expand its tourism sector activities.⁷⁷ This affords an avenue for advancing tourism development in Broome and the West Kimberley and further contributing to a dynamic regional economy.

⁷² KPP Business Development (2009)

⁷³ Tourism WA, (2010b)

⁷⁴ Government of Australia (2010b)

⁷⁵ Brereton et al (2007)

⁷⁶ Brereton et al (2007); Tourism WA (2006)

⁷⁷ WAITOC (2010)

Implications and Conclusions

Conclusion

Carefully managed tourism can create long-term economic benefits and employment, raise awareness of the special natural and cultural values of the Kimberley and contribute to their conservation for future generations to enjoy. Mining has a finite operational time, based on resource availability and market viability, and its cessation can result in loss of jobs and economic and social decline in regions that become reliant on such activity.

Tourism in Broome and the West Kimberley is a significant component of the economy, employing a much greater proportion of the local population than the mining and oil and gas industries. It is based on the brand perceptions of a relaxed, remote outback destination with isolated rugged landscapes, unspoilt coastal and marine areas and vibrant culture. It has been identified as one of the two 'iconic' tourism regions in Western Australia and is included in the Federal Australian Government's National Landscapes Initiative for these reasons.

The evidence indicates that tourism provides a much greater social and economic benefit at the regional level than mining and oil and gas. It has been shown that tourism-related ventures afford more opportunities for local employment, especially for Aboriginal community members. It can function to improve social and cultural identity and pride and provide a much greater return on investment per dollar within the region. As a non-extractive activity, tourism can operate on a sustainable basis into the future, while oil and gas has a finite life span that includes a peak production phase followed by a period of decline and then closure.

Large-scale industrial development resulting in the devaluing of the Kimberley brand would have an immediate effect on demand for tourism, which would then flow through to tourism operators, employment and business viability. The timing and duration of these impacts is unknown but all indications are that LNG plant development would significantly undermine the image of the Kimberley as an adventurous, unspoilt nature-based and cultural tourism destination and almost destroy the multi-million dollar tourism sector that has taken decades to build. Any commensurate industrial accident associated with the LNG operations would have a severe impact on the sector and such a possibility should be the subject of extensive preventative planning and emergency preparedness.

Report Findings

- Development of heavy industry in Broome and the West Kimberley is not compatible with the nature-based and cultural tourism that underpins the region's special status and its significant economic contribution to the region. Oil and Gas development would have significant detrimental social, environmental and economic impacts.
- Ongoing government support for, and investment in, tourism, particularly Aboriginal tourism ventures, would provide a better regional socio-economic return with a much lower risk to the natural and cultural environment than Oil and Gas.
- Establishment of an adequately defined and managed marine park in consultation with Traditional Owners is a logical next step in the development of the Broome and West Kimberley region as a unique, remote natural area attractive to tourists.
- Implementation of the tourism development priorities outlined in this report from Tourism WA's *Australia's Northwest: tourism development priorities 2010-2015* document should be carefully considered by regional stakeholders and government considering the future development of the Kimberley tourism industry.

References

- Access Economics (2007) *Measuring the economic and financial value of the Great Barrier Reef Marine Park, 2005-06*. Report to the Great Barrier Reef Marine Park Authority, Feb 2007
- Allen Consulting Group (2009) *The economics of marine protected areas. Application of principles to Australia's South West Marine Region*. Report to the Conservation Council of Western Australia. Nov 2009.
- Australia's North West Tourism (2010) *The Kimberley region*. Available at <http://www.australiasnorthwest.com> (accessed March 22, 2010).
- Breteron, D., Memmott, P, Reser, J., Buultjens, J., Thomson, L., Barker, T., O'Rourke, T. and Chambers, C. (2007) *Mining and indigenous tourism in northern Australia*. Technical report for the Sustainable Tourism CRC, Gold Coast, Australia.
- Butler, R. (2010) Oil and gas impacts on tourism. Personal Communication, email March 31, 2010.
- Butler, R. and Fennel, D. (1994) The effects of North Sea oil development on the development of tourism: the case of the Shetland Islands. *Tourism Management*, 15(5) 347-357
- Carlsen, J. and Wood, D. (2004) *Assessment of the economic value of recreation and tourism in Western Australia's national parks, marine parks and forests*. Report to the Sustainable Tourism CRC, Gold Coast, Australia.
- Catlin, J., Jones, T., Norman, B., and Wood, D. (2010). Consolidation in a wildlife tourism industry: the changing impact of whale shark tourist expenditure in the Ningaloo Coast Region. *International Journal of Tourism Research*, 12(2), 134-138.
- Costin, R., and Sandes, A. (2009) *Kimberley cetacean survey 2009: Observations on the distribution and behaviour of Humpback Whales and other cetaceans in Kimberley waters*. Kimberley Waters, Broome, Western Australia.
- CSIRO (2010) *Research spotlight turns on Ningaloo region*. Accessed March 31, 2010 at: <http://www.csiro.au/science/Ningaloo.html> . S
- Dept. of Education, Employment and Workplace Relations (2008) *Labour market information portal*. Accessed March 31, 2010 at: <http://www.workplace.gov.au> . Australian Commonwealth Government, Canberra.
- Dept of Mines and Petroleum (2009) *Browse Basin*. Accessed April 1 at <http://www.dmp.wa.gov.au/1878.aspx> . Government of Western Australia, Perth.
- Dept. of State Development (2009) *Kimberley LNG social impact assessment volume 1: scope and profile*. Government of Western Australia, Perth.
- Driml, S. and Common, M. (1995) Economic and financial benefits of tourism in major protected areas. *Australian Journal of Environmental Management*. 2(1) 19-29
- Duffus, D. A., and Dearden, P. (1990). Non-consumptive wildlife-oriented recreation: a conceptual framework. *Biological Conservation*, 53, 213-231.
- Dwyer, L., Forsyth, p. and Spurr, R. (2004) Evaluating tourism's economic effects: new and old approaches. *Tourism Management*, 25, 307-317.
- Ekinci, Y. and Hosany, S. (2006) Destination personality. An application of brand personality to tourism destinations. *Journal of Travel Research*. 45, 127 - 139
- Fryer-Smith, S. (2002) *Aboriginal benchbook for Western Australian courts*. Australian Institute of Judicial Administration Incorporated, Melbourne, Australia.
-

- Garrett, P. (2010) *Whales worth more alive than dead*. Speech delivered to the Australian National University's Centre for International and Public Law. Accessed April 20, 2010 at <http://www.theage.com.au/environment>
- Government of Australia (2010a) *Australia's National Landscapes*. Accessed 20 April, 2010 at <http://www.environment.gov.au>
- Government of Australia (2010b) *Australian Government gets behind Kimberley tourism*. Media release 12 April, 2010 accessed at <http://www.tourism.australia.com>
- Hannan, E. (2010) Asian guest workers would become 'second-class citizens'. *The Australian Newspaper*. April 1, 2010. Available at: <http://www.theaustralian.com.au/news/nation>
- Hughes, M. and Carlsen (2009) Developing a knowledge platform on value of parks for tourism. *Proceedings of the BEST EN Think Tank IX: The Importance of Values in Sustainable Tourism*. James Cook University. Singapore, June 15-18, 2009
- Hughes, M. and Jones, R. (in press 2010) From productivism to multi-functionality in the Gascoyne–Murchison Rangelands of Western Australia. *The Rangeland Journal*.
- Hughes, M. and Macbeth, J. (2005) *Tourism development in the southern Wheatbelt of Western Australia. From Dryandra Woodland to Dryandra Country*. Technical report for Sustainable Tourism CRC, Gold Coast, Australia.
- Jenner, K.C.S. Jenner M-N.M., and McCabe, K.A. (2001) *Geographical and temporal movements of Humpback Whales in Western Australian waters*. Australian Petroleum Production and Exploration Association. 750-765
- Kimberley Development Commission (2009a) *A Kimberley snapshot, 2009*. Available at http://kimberley.wa.gov.au/documents/kdc/Kimberley_Snapshot.pdf. Government of Western Australia.
- Kimberley Development Commission (2009b) *The Kimberley, an economic profile*. Available at: http://www.kdc.wa.gov.au/documents/kdc/KDC_Economic_Profile.pdf. Government of Western Australia.
- KPP Business Development (2006) *Broome accommodation study future needs analysis*. Report for Tourism WA, November, 2006.
- KPP Business Development (2009) *Tourism impact assessment – Kimberley Liquefied Natural Gas (LNG) Project*. Report for Tourism WA and Western Australia Department of State Development. Broome, Western Australia.
- Mercer, D. (2010) Barnett backs Point Torment for Browse LNG hub. *The West Australian Newspaper*. June 2, 2010. Accessed June 25, 2010 at: www.thewest.com.au
- Morgan, N., Pritchard, A. and Piggott, R. (2002) New Zealand, 100% pure. The creation of a powerful niche destination brand. *The Journal of Brand Management*. 9(4), 335-354
- MPRA (2009) *Annual report, 1 July 2008 – 30 June 2009*. Marine Parks and Reserves Authority, Fremantle, Western Australia. August 2009.
- Pike, S. (2005) Tourism destination branding complexity. *Journal of Product and Brand Management*. 14(4), 258-259
- Pritchard, B., Sutherland, D. and Crawford, J (2001) *The Aboriginal component of the Kimberley economy*. Report for the Kimberley Development Commission, Kununurra, Western Australia.
- Scherrer, P., Smith, A. Dowling, R. (2008) *Tourism and the Kimberley coastal waterways: Environmental and cultural aspects of expedition cruising*. Report for Sustainable Tourism CRC, Gold Coast, Australia.
- Stoeckl, N., Smith, A., Newsome, D., and Lee, D. (2005). Regional economic dependence on iconic wildlife tourism: case studies of Monkey Mia and Harvey Bay. *Journal of Tourism Studies*, 16(1), 69-81.
-

- Sutherland, D. and Johnson, P. (2001) *An input-output table for the Kimberley region of Western Australia. Measuring regional economic benefits and impacts in Western Australia's Kimberley region*. Report to the Kimberley Development Commission,
- Taylor, J. and Scamby, B. (2005) *Indigenous people and the Pilbara mining boom: A base line for regional participation*. Research Monograph No. 25. Centre for Aboriginal Economic Policy Research, The Australian National University, E Press, Canberra
- The Wilderness Society WA (2009) *Indigenous tourism industry thrives in Kimberley: Polluting industry is not the region's future!* Media release accessed March 30, 2010 at: <http://www.wilderness.org.au/>
- Tourism & Transport Forum (no date) *Comment on the Tourism Western Australia tourism 2020 discussion paper*. Tourism & Transport Forum, Sydney Australia.
- Tourism WA (2006) *Listening, looking, learning. An Aboriginal tourism strategy for Western Australia 2006-2010*. Government of Western Australia, Perth Sept. 2006.
- Tourism WA (2007) *Brand WA: What is destination branding?* Accessed April 7, 2010 at: <http://www.brandwa.com/en/What+is+Destination+Branding/default.htm>
- Tourism WA (2009) *Shire of Broome overnight visitor fact sheet. Years ending 2006/07/08*. Government of Western Australia, Perth
- Tourism WA (2010a) *Australia's Northwest: tourism development priorities 2010-2015*. March 2010.
- Tourism WA (2010b) *Visitor experiences and expectations research 2008/2009*. Government of Western Australia, Perth.
- Tourism WA (2010c) *Tourism Western Australia image library*. Accessed April 8, 2010 at: <http://imagegallery.tourism.wa.gov.au>
- Tourism WA (2010d) *New strategy and business model to refocus Tourism WA. Better targeted resources and more funds directed to marketing the state*. Accessed May 21, 2010 at: <http://www.tourism.wa.gov.au>
- Trembath, R. (2008) *Destination salience: a model of consideration and choice for Australian holiday travel*. Report for Sustainable Tourism CRC, Gold Coast, Australia.
- Tremblay, P. (2002). Tourism wildlife icons: attractions or marketing symbols? *Journal of Hospitality and Tourism Management*, vol. 9, pp. 164-181.
- TTF (2010) *Western Australia budget 2010-2011 TTF analysis*. Accessed June 25, 2010 at: www.ttf.org.au
- WAITOC (2010) *Indigenous tourism profile*. Accessed March 30, 2010 at: <http://www.waitoc.com/en/Indigenous+Tourism+Profile/default.htm>
- Wilson, E. & Smith, M. (2009). *Whale shark interaction management: progress report 2009*. Progress report for the Department of Environment and Conservation. Wildlife Management Program No. 27.
- Wood, D., and Glasson, J. (2006). Giving the environment a voice: the transformational potential of valuing tourism in sensitive natural environments: the case of the Ningaloo coastal region, Western Australia. *Journal of Planning Practice and Research*, 20(4).
- WorleyParsons (2009) *Site assessment for a supply base to support the Browse Basin. Assessment of Broome, Derby, Point Torment and James Price Point*. Report for the Dept. of State Development, Western Australia.
- Wright G. & Pyke C. (2009) *Fishing industry impact study. James Price Point proposed Liquefied Natural Gas Precinct*. Prepared for the Department of Fisheries, Western Australia.

