

Tourism Inputs to Broome Growth Plan

25th October 2016

About this report

This summary report consolidates the inputs for the Tourism component of the Traded Economy sections of the Broome Growth Plan. It is based on the weight of findings and recommendations of a number of earlier reports by various authors, and is not intended to provide new analysis or new recommendations.

The reports used in the preparation of this document are listed in Appendix A.

This document has been split into modular text blocks for insertion into the final Broome Growth Plan document and final style revision and copywriting. The relevant Section and Heading is listed at the beginning of each module.

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1. Section 2 – Addition to the Introduction

The recent TNS research into target market perceptions, motivations and barriers to visiting Broome helps to focus on the three-part challenge to achieving the Growth Plan objectives. The findings showed that while Broome and the Kimberley both have strong appeal to three different market sectors, there are significant real and perceived barriers to visitation – awareness and knowledge levels were low, particularly with the linkage between Broome and the Kimberley, Broome is seen as expensive to get to, the experience once here is not up to expectation, and there is not enough product intensity to warrant extended or repeat visits.

The three-part challenge, then, is to:

- Leverage the broader range of imagery and experiences to build a more compelling reason (and brand position) to visit
- Make it easier to visit once people have made the decision – through greater access for cruise, fly and drive markets
- Deliver a world-class experience once they are here by leveraging increased product range, better access to indigenous tourism product and a more vibrant and energized industry that is supported by strong leadership

Tourism is uniquely placed to be one of the major growth pillars of Broome and the Kimberley. It already is a strong contributor to both economic output and employment, and there are significant opportunities for Tourism to play a major role in achieving the Scenario 3 outcomes identified by the Project Control Group through enhanced indigenous workforce participation while simultaneously meeting many target market needs for high quality indigenous tourism experiences.

2. Section 2 – List of Potential Projects/Programs

Project and Description	Leadership	Timeframe
Build a more compelling reason to visit		
<p>Integrated Brand and Marketing Strategy Based on the findings of the TNS research, it is clear that any brand and marketing strategy for Broome needs to be properly integrated with a broader Kimberley strategy. The brand strategy needs to provide a framework for industry to leverage, and needs to address target market perceptions of lack of product, and lack of awareness of Broome’s link to the Kimberley. The marketing strategy needs to provide an initiative-based roadmap to build on the brand framework and build awareness, consideration and visitation for Broome. The strategies will need be developed in alignment and integration with broader ANW and Kimberley</p>		2017

marketing efforts, and will therefore closely link into the Leadership project.		
Make it easier to get here		
<p>Activation of the Dampier Peninsula A proposal to seal the Cape Leveque Road to provide greater connectivity between Broome, communities and tourism product along the Dampier Peninsula. Careful consideration needs to be given to the social, environmental and cultural impacts of greater access to the Dampier Peninsula.</p>		2020
<p>Increased Aviation access Increased Aviation access to a range of markets is a major enabler of future Tourism growth. Initiatives, incentives and cooperative marketing programs will need to be developed in parallel with broader demand creation activities to ensure sustainable success. Ongoing route viability will require other industries to be growing in tandem with tourism to reduce seasonality and spread the risk for airlines.</p>		Ongoing
<p>Broome Port Cruise Liner Capacity While visitation to the Port of Broome by cruise liners is limited compared to other regional Western Australian ports, it is one of the most recognized port destinations. Assuming local product can be effectively integrated with visits from cruise liners, the tourism industry will benefit greatly for more, longer visits from larger vessels. This requires upgrades to port infrastructure and operations, in particular the removal of a rock/sand mass in the port channel to enable cruise ship entry on low tide, and an all tide gangway to enable passengers to safely disembark. The Kimberley Port Authority is current exploring different options for progressing these requirements.</p>	Kimberley Port Authority	2020
Deliver a world-class experience		
<p>Chinatown Revitalisation Chinatown is a historical commercial centre in Broome located between Carnarvon and Dampier Streets in the town's centre. It is an important component of the built form in terms of demonstrating the multi-cultural nature of the town from both a local and tourism perspective. Revitalisation in terms of built form and activity will have significant positive local impact and serve as a tourist attraction, reflecting the unique cultural heritage of Broome.</p>		
<p>Broome Cultural/Interpretive Centre An iconic multi-functional centre that is a major new attraction for Chinatown, interactively showcasing the full diversity and depth of Broome and the Kimberley region's people, natural history, art and culture for visitors and locals.</p>	Broome Cultural Centre Working Group	
<p>Commercial and Recreational Boating Infrastructure A small vessel marina would deliver value to the highly marine-oriented local community, and would also be an important tourism asset. It is envisaged that a facility would include retail capacity, rendering it a tourism asset in its own right, and would also provide small marine tourism</p>	DoT is forming a steering committee to progress	

<p>operators with a more appropriate operational base. It would also attract the growing global private cruising market. The facility should also include a small boat launching facility in order to service the independent traveler market.</p>		
<p>Iconic Events Development of a calendar of iconic events in Broome, with linkages to Kimberley events. Successfully implementing this strategy will require a streamlined approach to event approvals, licensing and logistics and the development of add-on tourism products to package with the events.</p>		2017
<p>Leadership A reconciled and sustainable long-term leadership model for tourism in Broome is critical. The current iteration of the Broome Tourism Leadership Group was intended as an interim step towards this model, but now there needs to be an integrated model developed that aligns with regional strategy through ANW, Kimberley strategy across multiple stakeholders, and the strategy for Broome. The model needs to address funding, governance and specific mandates for different parties within the leadership structure.</p>		2017

3. Section 2 - Pathways Table

The table below is set out in the pathways structure, and is intended for use by a designer to bring the information into the final graphical format required.

Pathways	Short term	Medium term	Long term vision
Small enterprise	<ol style="list-style-type: none"> 1. Brand and marketing strategy 	<ol style="list-style-type: none"> 2. Fast-track program for new product and events 3. Packaging workshops to assist small operators to form new packaged offers 4. Leverage brand in small business marketing 5. Indigenous product acceleration program 	Small business feels supported in delivering the best possible outcome for Broome and its visitors.
Governance	<ol style="list-style-type: none"> 1. Determination of optimal long term leadership structure 	<ol style="list-style-type: none"> 2. Implementation of long term leadership structure 	The different tiers of tourism marketing leadership for the Kimberley and Broome are integrated and functional.
Enablers	<ol style="list-style-type: none"> 1. Broome Tourism Employment Plan 		There is a sustainable and skilled employment base for Broome.
Infrastructure		<ol style="list-style-type: none"> 1. Broome Port upgrades 2. Chinatown revitalisation 3. Cape Leveque Road upgrade 4. Small vessel marina 	Broome tourism infrastructure is refreshed and meets the needs of target cruise, fly and drive markets.

4. Section 3 - Introduction

The Tourism sector is a major contributor to Broome's economy, both in terms of GRP and employment, but it is not without its challenges. On one hand Broome and the Kimberley offer a mix of iconic attractions and experiences, but is expensive to get to by air, is lacking in some key infrastructure and some key target markets remain unaware of the full benefits that are available. The strategies and investments are designed to amplify the benefits of Broome, while removing or minimizing some of the potential barriers to visitation.

Beyond the challenges, Tourism is uniquely placed to be one of the major growth pillars of Broome and the Kimberley through the Broome Growth Plan. It already is a strong contributor to both economic output and employment, and there are significant opportunities for Tourism to play a major role in achieving the Scenario 3 outcomes identified by the Project Control Group through enhanced indigenous workforce participation while simultaneously meeting many target market needs for high quality indigenous tourism experiences.

Addition to The Market

The recent TNS research into target market perceptions, motivations and barriers to visiting Broome helps to focus on the three-part challenge to achieving the Growth Plan objectives. The findings showed that while Broome and the Kimberley both have strong appeal to three different market sectors, there are significant real and perceived barriers to visitation – awareness and knowledge levels were low, particularly with the linkage between Broome and the Kimberley, Broome is seen as expensive to get to, the experience once here is not up to expectation, and there is not enough product intensity to warrant extended or repeat visits.

The three-part challenge, then, is to:

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5. Section 3 – Opportunities and Challenges

Opportunities

- Aviation linkage to Asia
- Increased product packaging
- Greater Aboriginal product and workforce participation
- Better linkage with the Kimberley
- Leveraging Broome's unique multi-cultural history
- Broader calendar of iconic events
- Increased product innovation
- Better activation of spaces and places around Broome

Challenges

- Defining the brand of Broome
- Tackling the perception of lack of product and experience density
- Lack of refreshed infrastructure
- Cost of getting to Broome – flights & fuel
- Cost of accommodation & hospitality
- Flight schedules in off peak season
- Competition from other “value for money” destinations
- Finding the right staff that are customer focused

6. Section 3 - Drivers

<p>Project and Description</p>
<p>Activation of the Dampier Peninsula</p> <p>A proposal to seal the Cape Leveque Road to provide greater connectivity between Broome, communities and tourism product along the Dampier Peninsula. Careful consideration needs to be given to the social, environmental and cultural impacts of greater access to the Dampier Peninsula.</p>
<p>Broome Port Cruise Liner Capacity</p> <p>While visitation to the Port of Broome by cruise liners is limited compared to other regional Western Australian ports, it is one of the most recognized port destinations. Assuming local product can be effectively integrated with visits from cruise liners, the tourism industry will benefit greatly for more, longer visits from larger vessels. This requires upgrades to port infrastructure and operations, in particular the removal of a rock/sand mass in the port channel to enable cruise ship entry on low tide, and an all tide gangway to enable passengers to safely disembark. The Kimberley Port Authority is current exploring different options for progressing these requirements.</p>
<p>Chinatown Revitalization</p> <p>Chinatown is a historical commercial center in Broome located between Carnarvon and Dampier Streets in the town's center. It is an important component of the built form in terms of demonstrating the multi-cultural nature of the town from both a local and tourism perspective. Revitalization in terms of built form and activity will have significant positive local impact and serve as a tourist attraction, reflecting the unique cultural heritage of Broome.</p>
<p>Broome Cultural/Interpretive Centre</p> <p>An iconic multi-functional centre that is a major new attraction for Chinatown, interactively showcasing the full diversity and depth of Broome and the Kimberley region's people, natural history, art and culture for visitors and locals.</p>
<p>Commercial and Recreational Boating Infrastructure</p> <p>A small vessel marina would deliver value to the highly marine-oriented local community, and would also be an important tourism asset. It is envisaged that a facility would include retail capacity, rendering it a tourism asset in its own right, and would also provide small marine tourism operators with a more appropriate operational base. It would also attract the growing global private cruising market. The facility should also include a small boat launching facility in order to service the independent traveller market.</p>

7. Section 3 – Tourism Uplift Estimates

In an attempt to estimate the future uplift of different tourism initiatives, the table below categorises the potential impacts of each of the major strategies. Direct uplift means that the initiative will provide a measurable additional boost to either GRP or employment. Multiplier initiatives will have a broader impact across the total tourism contribution to GRP (for example additional products and experiences means there is more reason for each visitor to Broome to stay longer and spend more). Where a specific initiative does not currently have a fully worked business case, the uplift is estimated either as a % of growth over and above trend (direct uplift), or as a % of tourism’s contribution to GRP (multiplier).

Major uplift strategies	GRP		Employment	
	Direct	Multiplier	Direct	Multiplier
Cruising	Y			Y
Cape Leveque Road	Y		Y	
Marketing/brand	Y			Y
Infrastructure		Y	Y	Y
Culture		Y	Y	
Aviation	Y			Y
Product		Y	Y	

Contribution to GRP

The table below lists the potential contribution to GRP for tourism initiatives.

Strategy	% uplift	\$ value (\$m)	Source/assumption/rationale
Cruising	N/A	\$6.5	13 new ships x \$500,000 benefit
Cape Leveque Road	N/A	\$5.4	URBIS modelling
Marketing/branch	30%	\$82.5	30% x trend CAGR ¹ x tourism contribution to GRP
Infrastructure	15%	\$37.1	15% increase in tourism contribution to GRP over baseline
Culture	10%	\$24.7	10% increase in tourism contribution to GRP over baseline
Aviation	30%	\$82.5	30% x trend CAGR ¹ x tourism contribution to GRP
Product	20%	\$49.5	20% increase in tourism contribution to GRP over baseline (approximately 1 extra day of stay in Broome per visitor)
TOTAL POTENTIAL TOURISM CONTRIBUTION		\$288.2	

¹ – CAGR = Compound Annual Growth Rate

APPENDIX A – List of Contributing Reports

Report	Author	Date
2036 and Beyond: A Regional Investment Blueprint for the Kimberley	KDC	July 2014
Broome and Kimberley Perceptions Research	TNS	March 2016
Broome Tourism Strategy	Haeberlin Consulting, Broome Tourism Leadership Group	September 2014
Broome Economic and Situational Analysis	Urbis	September 2016
Unlocking the Door – A study into the feasibility of Broome as a commercial and logistics hub for the Kimberley	Australian Venture Consultants	July 2015
Unlocking the Door Consultation Project – Tourism Sector Workshop Report	Australian Venture Consultants	May 2016