



# Destination Visitor Survey

## Strategic Regional Research – Western Australia

### Tourism in the Kimberley coastal waterways: Summary of results

#### Introduction

Research was undertaken in 2005–06 in response to concerns about the impacts caused by the growth in the cruise tourism industry along the Kimberley coast, which extends from Broome to the Northern Territory border. This area is one of Australia’s last true wilderness areas.

Anecdotal evidence suggested that there had been a significant increase in the number and diversity of commercial cruises along the Kimberley coast. This had potential to negatively affect the quality of the remote, nature-based experience that visitors expected if appropriate tourism and environmental management processes were not put in place.

Research was conducted with the following target groups:

- Key stakeholders
  - Australia’s North West Tourism Organisation (ANW)
  - Department of Conservation and Land Management (CALM)
  - Department of Fisheries (DoF)
  - Department for Planning and Infrastructure (DPI)
  - Shire of Derby/West Kimberley
  - Shire of Wyndham/East Kimberley
  - Kimberley Regional Development Commission
  - Kimberley Land Council (KLC)
  - Department of Indigenous Affairs (DIA)
  - Pastoral land leaser/s associated with the Kimberley coast
  - Pearl Producers Association
- Tourism operators – a total of 24 small, medium and large operators
- Current or recent visitors to the Kimberley coastal area – a total of 76 visitors

#### The Kimberley cruise industry

- The Kimberley cruise market includes the following market segments: day trips; non-luxury eco-adventures; large luxury vessels; and specialist fishing adventures (luxury and non-luxury).
- Research indicated there were between 40-45 operators working the Kimberley waterways at the time of this survey.

- About half of the operators were relatively new, having started business in the previous five years, while one quarter had been operating for six to nine years. Around one in five had been operating on the Kimberley waterways for 10 years or more.
- There were about five to six newcomers each year, but most only lasted one season. Stakeholders and operators agreed that there had been a significant increase in the number of operators over the previous five years.
- Kimberley-based operators made up the majority of total operators (76%), with 64% originating from Broome, 9% from Derby, and 2% from Wyndham. However, they had relatively small passenger capacities, and carried under half (48%) of the total passengers on the waterways.
- Nearly one quarter of operators (24%) were non-Kimberley based, of which 11% originated from Perth, 7% from Queensland, 4% from the Northern Territory, and 2% from Karratha. They comprised some of the largest vessels, and overall accounted for over half (52%) of all passengers. The three largest operators (with a total combined passenger capacity of 234 passengers) originated from Queensland.
- Around 51% of passengers had travelled on a vessel carrying between nine and 18 passengers. A further 27% were on vessels with capacities of between 19 and 40 passengers.
- The peak season falls between May and September, although operators were expanding their activity periods so that tours were offered throughout the shoulder season (April and October). Many operators expected that the peak season would continue to expand in future years.
- Most visitors travelled during July (24%), August (24%) and September (19%), with only 13% travelling during May and 10% during June.

## Visitor profile

- Both stakeholders and operators agreed that the Kimberley cruise industry as a whole was aimed at a ‘high end’ market. Consequently, visitors were mainly white collar professionals or retirees with high disposable incomes, who were well travelled, both within Australia and overseas.
- Most passengers (85%) were interstate visitors. Over one third (34%) came from New South Wales and 21% from Victoria, with smaller proportions from Queensland (15%), Australian Capital Territory (9%) and South Australia (7%).
- Of the intrastate visitors, 9% were from Perth and 6% were from regional Western Australia.
- About 4% of visitors were aged 15–44 years, 67% aged 45–64 years and 26% aged 65 years and over.
- Most visitors (94%) stated this was their first cruise along the Kimberley coast—only 6% had previously been on another cruise in this region.
- Visitors to the Kimberley coast commonly sought activity and adventure on their holiday (generally adventure within safe boundaries and with a degree of comfort), and enjoyment of the warm weather.
- Specific reasons for visiting were to see the scenery and features of the Kimberley, fishing, isolation and the relaxation that brings—to get away, diving, and the cruise itself, including interaction with others.
- Most visitors considered a few cruising options, although none were aware of how many different operators there were, generally thinking there were about six choices available. Factors affecting the choice of cruise vessel were the:
  - size of the vessel and number of people on board (there was a preference for larger vessels with better facilities)
  - level of comfort (particularly private ensuite facilities)
  - ability to go fishing
  - length of the trip

- ability to go ‘one way’ (more time at sea means less time seeing features)
- cost of the cruise.
- The majority of cruise passengers (84%) spent at least one day in the Kimberley that was not part of their cruise, and 44% spent more than five days in the Kimberley. Most of this time was spent in Broome.

## Activities offered

- The most widely offered activity by operators was fishing. About 91% of operators promoted fishing, although it was rarely the main focus of the cruise.
- Most operators offered a range of ‘eco-style’ activities such as bush walking or exploring, flora/fauna/bird watching, viewing Aboriginal rock art, beach walking and swimming.
- Only two operators promoted educational experiences, but most operators said they offered such activities. However, only 27% of visitors stated that educational activities/learning were offered as part of their cruise.
- The most widely offered activity was visiting/seeing Aboriginal art (63% of visitors), followed by beach walking (56%), exploring (53%), swimming in waterholes (51%) and sightseeing (50%).
- One in eight respondents (13%) stated that some activities offered were physically too difficult for them to participate in, such as rock climbing.

## Satisfaction

- All passengers (100%) stated that they were satisfied with the cruise, 99% of whom were ‘very satisfied’.
- The aspects that were mentioned repeatedly when discussing satisfaction with the cruise covered five key areas: features and scenery; specific locations; specific activities; vessel staff and facilities; isolation and serenity.
- The activities most enjoyed by visitors were fishing (47%), sightseeing (46%) and exploring (43%). These were followed by visiting Aboriginal art (26%), bushwalking (25%), beach barbecues (23%), beach walking (22%), relaxing on the boat (22%), visiting cultural sites (22%) and swimming in waterholes (21%).

## Environmental impacts

- Most stakeholders were aware of overcrowding of particular sites along the Kimberley coast. They felt that any ongoing environmental and cultural impacts would affect the quality of future visitor experience, and should be addressed immediately.
- Operators were less likely than most stakeholders to consider overcrowding a major issue, but felt that it could be a problem in the future if growth of the industry continued at the current rate.

All operators agreed with the need to educate both cruise operators and private vessels, and raise awareness of environmental sensitivities within the area to ensure the region remains pristine in the future.

- Stakeholders mentioned that environmental impacts were not of immediate concern because of the:
  - seasonality of the industry - the shoulder and off-peak seasons gave the area time to recover, so no one area was under continuous stress
  - importance of the product - whatever environmental damage occurred would always be limited by the operators’ own interest in preserving the area, as it was ultimately their ‘product’.
- Most visitors (97%) rated the level of environmental sensitivity on the cruise as very important or important.
- The majority of visitors (84%) were very satisfied with the level of environmental sensitivity shown while on the cruise, and 13% were satisfied.

## Cultural impacts

- Most operators agreed that there was a need to educate the industry about the significance of the area to Indigenous people, and of appropriate conduct on the land and water.
- Stakeholders mentioned that the following issues needed significant attention:
  - education/re-education of operators on Indigenous heritage and appropriate conduct on the water and land
  - industry engagement with traditional owners to develop guidelines for operator conduct
  - ongoing monitoring and regulation of operator conduct for culturally appropriate practices.
- Most visitors (62%) rated the level of cultural sensitivity on the cruise as very important or important.
- The majority of visitors (75%) were very satisfied with the level of cultural sensitivity shown while on the cruise, and 15% were satisfied.

## Management issues

- Stakeholders and operators thought that enforcement was the biggest regulation problem because self-enforcement was not sufficient.
- The existing management scenario was too confusing, as it consisted of different requirements from different regulatory bodies; both operators and stakeholders felt a more integrated waterways management strategy was necessary.
- Stakeholders and operators felt that safety concerns had not been given sufficient attention.
- Existing management practices did not maximise tourism potential.

## Management alternatives

- Operators and stakeholders gave their opinion on different management alternatives:
- Greater regulation and licensing - an accreditation scheme for cruise operators would improve operator conduct and raise cultural/environmental awareness. The main challenge was selling regulation to operators wary of government intervention.
- Operator/visitor caps - caps were needed to manage overcrowding at particular sites, but there would be difficulty in identifying when numbers should be capped. The real problem was operators wanting to be in the same place at the same time.
- Site-specific guidelines - only specific sites needed attention and there was potential to engage with traditional owners. Operators welcomed this approach due to perceived benefits from clear, specific guidelines. Challenges included lack of adequate enforcement, particularly in relation to remote sites. It was felt that different guidelines for different sites would be too complex, and that all sites should be brought under the same guidelines.
- Sites off bounds/seasonal closure of sites – stakeholders considered it necessary to limit numbers of operators and visitors at sensitive sites. Most operators thought this too restrictive, citing a need to balance restrictions with operators' commercial activity. Operators could face difficulties changing their itineraries if insufficient closure notice were given.
- Site modifications - interpretive signage could improve visitors' educational experience and boardwalks would help operators with appropriate conduct at sites, although traditional owners may object due to interference with the land. Operators thought visitors would find the modifications 'too tacky', as they expected to see untouched land.

- User levies and surcharges - visitors would support reasonable pricing (\$50 to \$100 a head) for levies for environmental preservation, and traditional owners and communities. Operators need to see the benefits to them and the industry for this to be accepted.
- Scheduling of routes - this would address crowding issues at particular sites and reduce accident risk. Challenges were deciding which operators would get preferential access, and that tides made route scheduling extremely difficult. Some operators also felt this strategy would impact unfairly on the smaller operators with flexible itineraries.

## Visitors' view on management alternatives

- Most visitors (62%) strongly supported a system of accreditation which would allow them to assess an operators' local knowledge of the area before they booked.
- Visitors considered the following management alternatives would have a strong positive impact on their experience:
  - limiting the number of cruise vessels that can operate along the Kimberley coast (50%)
  - structured scheduling so that you can guarantee avoiding other vessels while on the cruise (49%)
  - specific written guidelines in pamphlet form for sites detailing sensitivities of the area and protocols (49%).
- Visitors supported paying a \$100 levy for funding both environmental (44%) and cultural (49%) sustainability.
- Over half of all visitors (55%) did not support modifying sites with walkways and signage.
- Visitors who did not support paying fees for funding environmental sustainability (31%), and cultural sustainability (25%), gave the reasons for their objections as:
  - unnecessary government interference
  - that the cruise was already expensive
  - that it was their right to visit.
- In general, visitors were more supportive of paying user levies to traditional owners to help protect sacred Indigenous sites, than paying a government agency for environmental protection.

For a copy of the full Strategic Regional Research Report, please email [tra@tourism.australia.com](mailto:tra@tourism.australia.com)

Tourism Research Australia  
 Level 3 11-17 Swanson Plaza  
 PO Box 1110  
 Belconnen ACT 2617

Telephone: + 61 2 6228 6100

Facsimile: + 61 2 6228 6180

Email: [tra@tourism.australia.com](mailto:tra@tourism.australia.com)

Publication date: March 2009

ABN 99 657 548 712

[www.tra.australia.com](http://www.tra.australia.com)

© Copyright Tourism Australia 2009. Tourism Australia and Tourism Research Australia permits copies to be made of this Research data for the purpose of promoting Australian tourism, provided that Tourism Research Australia is recognised on any copies as the author and the material is reproduced in its current form. However, copies may not be made for a commercial purpose, that is, for sale without the permission of Tourism Research Australia. This information is presented in good faith and on the basis that neither Tourism Australia or Tourism Research Australia, nor their agents or employees, are liable (whether by reason of error, omission, negligence, lack of care or otherwise) to any person for any damage or loss whatsoever which has occurred or may occur in relation to that person taking or not taking (as the case may be) action in respect of any statement, information or advice given in this publication. Data derived from Tourism Research Australia surveys are subject to sample error. Users of the data are advised to consult the sample error tables contained in Tourism Research Australia publications or otherwise available from Tourism Research Australia before drawing any conclusions or inferences, or taking any action, based on the data.

**Tourism Australia**  
 Tourism Research Australia 