

WESTERN AUSTRALIAN CRUISE TOURISM STRATEGIC PLAN 2023 - 2033



WESTERN
AUSTRALIA
WALKING ON A DREAM

FREMANTLE | WALYALUP



ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Aboriginal people as the Traditional Custodians of Western Australia and pay our respects to Elders past and present. We celebrate the diversity of Aboriginal West Australians and honour their continuing connection to Country, culture and community. We recognise and appreciate the invaluable contributions made by First Nations peoples across many generations in shaping Western Australia as a premier destination.

MESSAGE FROM THE HON RITA SAFFIOTI MLA, DEPUTY PREMIER; MINISTER FOR TOURISM

The Western Australian Government, through Tourism Western Australia, is delighted to present the Western Australian Cruise Tourism Strategic Plan 2023 - 2033.

Cruise tourism is an important part of the state's tourism industry. Before COVID-19, cruise itineraries attracted tens of thousands of visitors to Western Australia each year, while showcasing many of our regional destinations' extraordinary scenery. The sector contributes significantly to the economy and in 2018-19 generated nearly \$229 million in economic benefit and supported 850 jobs pre-pandemic.

After restarting the industry in 2022 following two years of closed borders, the Western Australian Government remains committed to building the state's cruise tourism sector.

Tourism Western Australia has developed the Western Australian Cruise Tourism Strategic Plan 2023 - 2033 in consultation with the Cruise Western Australia Committee to maximise the economic benefits of cruise tourism to our state. The Strategic Plan will also ensure the state's eleven cruise port destinations deliver quality onshore activities and experiences for passengers cruising up and down our spectacular coastline into the future.

The Strategic Plan provides a clear direction on the goals, strategies and initiatives that will make Western Australia not just a desirable and capable cruise destination, but a must-see, highly sought-after holiday choice.

I look forward to seeing strong outcomes from this Strategic Plan over the next decade.



HON RITA SAFFIOTI MLA

Deputy Premier
Minister for Tourism



MESSAGE FROM CAROLYN TURNBULL, MANAGING DIRECTOR, TOURISM WESTERN AUSTRALIA

Western Australia is a place of natural wonders, supernatural contrasts and rare experiences. As one of the world's largest states, Western Australia has an incredibly diverse mainland and coastline stretching over 20,000km. A cruise in Western Australia offers visitors the opportunity to experience one of the most biodiverse landscapes on Earth.

Cruise tourism is an important part of the Western Australian tourism industry and makes a significant economic contribution to our state.

In 2012-13, at the start of the previous Strategic Plan, Western Australia attracted 56 cruise ship visits which contributed \$118 million to the economy. In 2018-19, the last year of trade before the COVID-19 pandemic, Western Australia welcomed 191 cruise ship visits, which delivered \$228.9 million in economic benefit.

In March 2020, Australian international and domestic borders closed, as did the cruise industry, due to COVID-19. It wasn't until two years later that restrictions were lifted, and cruise ships could once again return. Since re-opening, Western Australia has witnessed a strong recovery and there is a healthy global appetite for cruise resumption. Western Australia is expected to benefit from this pent-up demand and growing interest by travellers wanting to explore new cruise frontiers.

To set a strategic path aimed at capitalising on global, regional and domestic opportunities, Tourism Western Australia, in consultation with the Cruise Western Australia Committee and the WA cruise industry, has developed the Western Australian Cruise Tourism Strategic Plan 2023 - 2033. I would like to take the opportunity to congratulate the Cruise Western Australia Committee, and in particular, Professor Ross Dowling AM as Chair, for taking the lead role in working to develop a sustainable, coordinated and achievable future plan for this vibrant tourism sector.

The Strategic Plan outlines how Western Australia will influence the economic, social, cultural and environmental contribution cruise tourism makes to the state, with a vision to become a world-class cruise destination. This will be implemented through the avenues of cruise line attraction, cruise visit optimisation, enriching visitor experiences, developing appropriate marine infrastructure, fostering industry partnerships and supporting sustainable growth. Activities proposed to be undertaken align with Tourism WA's ten-year industry-wide Western Australian Visitor Economy Strategy and reflect the Western Australian tourism brand 'Walking On A Dream'.

Tourism Western Australia looks forward to working with relevant stakeholders to deliver this Strategic Plan.



CAROLYN TURNBULL

Managing Director
Tourism Western Australia



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OVERVIEW OF THE CRUISE TOURISM SECTOR



GLOBAL CRUISE TOURISM

The global cruise tourism industry is continuing to recover from the pandemic. Passenger volume is expected to surpass the peak 29.7 million passenger volume of 2019 by the end of 2023. Furthermore, the global cruise industry is focusing heavily on sustainable cruise tourism, incorporating public health protocols and the pursuit of net carbon neutral cruising by 2050¹.

There were 302 cruise ships in operation globally in 2022, representing a total of 664,602 berths². Fourteen new ships, with an average capacity of 2,109 passengers, are expected to commence operations in 2023 and a total of 44 are on order to be delivered from 2023 through 2028. Sixty per cent of these ships will rely on LNG as a fuel source.

The pursuit of net carbon neutral cruising by 2050 incorporates a range of innovative solutions including: advanced recycling protocols, waste-to-energy initiatives, energy efficient ship design, supply chain sustainability programs, reverse osmosis water filtration systems, and pursuit of alternative fuels. By 2028, the Cruise Line Industry Association (CLIA) member fleet will include 38 LNG-powered cruise ships and 100 per cent will be fitted with advanced wastewater treatment systems. All new ships (except expedition ships) will have shoreside power connectivity, and 88 per cent of non-LNG new-build ships will have exhaust gas cleaning systems.

¹ CLIA (2020, 2022, 2023)
² <https://cruiseshiptraveller.com/how-many-cruise-ships/>



In 2011, just prior to the launch of Western Australia's previous Cruise Tourism Strategic Plan, global passenger volume was 20.5 million. In 2019 this figure peaked at 29.7 million, representing an average annual growth rate of 4.7 per cent. It is projected that passenger volumes will increase to 39.5 million or by 33 per cent over the period 2019 to 2027 (CLIA, 2023).

Globally, 85 per cent of those that have cruised before say they will cruise again – six per cent higher than before the pandemic. In 2020, the average age of the cruise tourist was 46.5 years with millennials the most enthusiastic generation for the future.

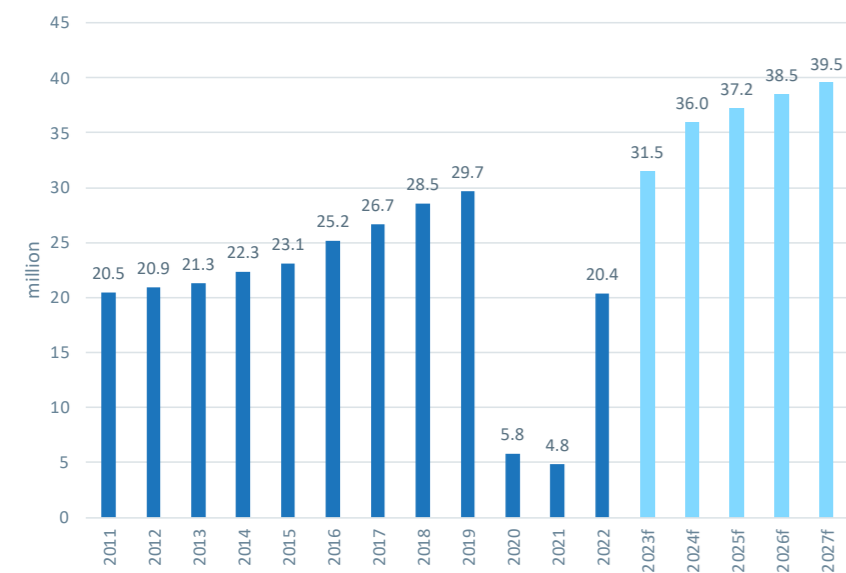
Expedition cruising, loosely defined as cruise ships with less than 100 pax but now upwards of 500 pax*, was a growing market pre-pandemic. Not one expedition ship was decommissioned during the pandemic, and 42 vessels with capacities between 100 and 530 pax have entered the market since 2019, or are scheduled to, before the end of 2023. Aside from two ships specifically built for the Galapagos, the others are all designed for world cruises. Expedition ships don't need port infrastructure and generally aim to interact with and benefit local communities in a sustainable way.

* In Western Australia we define expedition ships as those with between 35 and 300 pax.

Western Australia can benefit from the following global cruise tourism trends:

- A strong global rebound from the pandemic and continued international demand for cruising;
- Increased focus on the 'millennials' visitor market;
- The continued emergence of mega liners (> 1,500 pax) and luxury expedition cruise ships;
- Increased focus on sustainability by cruise lines; and,
- Significant investment in cruise port facilities in emerging markets, such as Asia.

FIGURE 1: HISTORICAL AND FORECAST GLOBAL PASSENGER VOLUMES



f = forecast

Source: CLIA (2023)

FIGURE 2: AUSTRALIA & SOUTH EAST ASIA



WYNDHAM TO BROOME	590 nautical miles 1 day 6 hours
BROOME TO PORT HEDLAND	253 nautical miles 13 hours
PORT HEDLAND TO DAMPIER	140 nautical miles 7 hours
DAMPIER TO EXMOUTH	212 nautical miles 11 hours
EXMOUTH TO GERALDTON	520 nautical miles 1 day 2 hours
GERALDTON TO FREMANTLE	213 nautical miles 10 hours
FREMANTLE TO BUNBURY	100 nautical miles 5 hours
BUNBURY TO BUSSELTON	22 nautical miles 1 hour 15 minutes
BUSSELTON TO ALBANY	242 nautical miles 12 hours
ALBANY TO ESPERANCE	224 nautical miles 11 hours

CRUISE TOURISM IN AUSTRALIA

The Australian cruise tourism market was experiencing a significant increase in the number of cruise ship visits³ and passenger days in port each year from 2011-12 until the pandemic.

In 2018-19, cruise ship visits to Australian port destinations reached an all-time high of 1,240. Since 2011-12, cruise ship visits have recorded an average annual growth of 7.7 per cent. During the same period, the number of cruise ships operating in Australian waters increased from 42 to 55, with strong growth in both international transit ships and ships that based themselves in Australia for part of the year. Passenger days in port, which is a leading indicator for passenger expenditure, grew by an annual average of 13.3 per cent to reach nearly 3.5 million in 2018-19.

From 2011-12 to 2018-19, the number of port destinations in Australia increased from 31 to 47. Queensland currently has the largest number of cruise port destinations with 15, followed by Western Australia with 11. The most frequented ports in Australia in 2018-19 in terms of cruise ship visit days⁴ were Sydney, Brisbane, Melbourne, Cairns, and Hobart.

TABLE 1: TOP 15 PORT/DESTINATION SHIP VISIT DAYS 2018-19

PORT/DESTINATION	STATE	VISIT DAYS	SHARE
SYDNEY	NSW	342	25.4%
BRISBANE	QLD	159	11.8%
MELBOURNE	VIC	125	9.3%
CAIRNS	QLD	90	6.7%
HOBART	TAS	75	5.6%
DARWIN	NT	72	5.4%
WHITSUNDAY	QLD	58	4.3%
ADELAIDE	SA	47	3.5%
FREMANTLE	WA	41	3.1%
MORETON IS	QLD	34	2.5%
BROOME	WA	27	2.0%
KANGAROO IS	SA	26	1.9%
BURNIE	TAS	25	1.9%
WYNDHAM	WA	18	1.3%
NEWCASTLE	NSW	17	1.3%

Source: AEC (2020)

³ Cruise ships with a capacity greater than 100 passengers. Sourced from AEC (2016, 2020)

⁴ A cruise ship may stay more than 1 day in a port/destination.

Key factors contributing to the growth in the Australian cruise industry include:

- Increasing consumer awareness of cruise holidays as a value for money holiday option;
- Increased product diversification of cruise holiday offerings appealing to a broader range of potential customers;
- An increase in port destinations and port infrastructure/cruise terminal facilities;
- An increased choice of cruise itineraries provided by various cruise companies to popular tourism regions; and,
- An increase in the number of cruise ships operating from Australia.

7.7%

Average annual increase in the number of cruise ship visits in Australia 2011-12 to 2018-19.

In 2018, 1.35 million (5.8 per cent of the population), or 1 in 17 Australians, took an ocean cruise, one of the highest penetration rates in the world (CLIA, 2019).

Pre-pandemic, the cruise industry was facing a shortage of cruise infrastructure to meet demand, particularly in the marque port of Sydney. Since then, government investment has seen the delivery of an International Cruise Terminal in Brisbane, and other cruise-related projects in Cairns and Eden have been delivered. Townsville has a project to increase its channel, allowing vessels up to 300m in length to access the port by the end of 2024. Cruise infrastructure developments outside of Western Australia help to secure additional cruise visits for Australia, which in turn brings additional opportunities for our state. Broome is on schedule to receive a new private sector-funded floating dock in late 2024. This will permit safe and efficient 24/7 operations, regardless of tide depth, and will facilitate larger cruise ships.

Whilst projections of cruising demand in Australia do not yet exist, the sector is making a significant recovery since Australian Government restrictions on international cruise ships ended on 17 April 2022. In 2022-23, 46 ships are expected to visit Australian waters to deliver multiple itineraries and some home-ported seasons (CLIA, 2022).

From a consumer demand perspective, growth in cruising intentions among Australians is as strong as all other travel sectors, with 25 per cent of Australian respondents in the Deloitte Global State of the Consumer Tracker (Labine-Romain, 2022) somewhat or very likely to take a cruise in the next three months. Interestingly, in the 18-34 age group, responses were close to 50 per cent.

AEC Group (2020) research on the impact of cruising in Australia during 2018-19 found that:

- Overall economic impact in Australia was \$5.2 billion, including direct expenditure of \$2.5 billion (direct expenditure includes all passenger, crew & cruise line expenditure in each port visited by cruise ships during the year);
- Passenger expenditure (excluding cost of cruise) was \$1.35 billion;
- Cruise line expenditure was \$1.082 billion;
- Crew expenditure was \$35.2 million;
- Of the 1,240 cruise ship visits, 45 per cent were home-port turnarounds;
- There were nearly 3.5 million passenger days in port;
- There were 341,200 crew days in port; and,
- More than 12,000 jobs were supported by cruise tourism.



CRUISE TOURISM IN WESTERN AUSTRALIA

Western Australia has experienced significant growth in the number of cruise ship visits (> 100 pax) increasing from 56 in 2012-13 to 130 in 2018-19. In addition, there were 61 small expedition cruise ship visits (35 to 100 pax) in 2018-19.

In 2018-19, the industry generated approximately \$109.3 million in expenditure, resulting in an economic output of \$228.9 million and supporting nearly 850 jobs. Before the Australian Government's COVID-19-related cruise ban in March 2020, this expenditure had already been exceeded, reaching \$261.9 million (AEC, 2020). However, this was in part due to the redirection of several large ships from COVID-19 hotspots to Western Australia.

The Western Australian cruise tourism industry recorded a total of 244 cruise ship visit days (> 35 pax) in 2018-19, a significant increase from 195 days in 2017-18. Overall, the total passengers aboard the ships visiting Western Australia reached 127,360 in 2018-19.

Western Australia has eleven port destinations. The most frequented for ships with 100 or more passengers is the port of Fremantle. Broome was the second most frequented port and is also a key port for expedition cruise ships, as outlined in Table 2.

TABLE 2: WA CRUISE SHIP VISITS & VISIT DAYS 2018-19

PORT DESTINATION	CRUISE SHIPS (> 100 PAX)		CRUISE SHIPS (35-100 PAX)		TOTAL	
	VISITS	VISIT DAYS	VISITS	VISIT DAYS	VISITS	VISIT DAYS
ALBANY	14	14			14	14
BROOME*	27	27	41	41	68	68
BUNBURY	3	3			3	3
BUSSELTON	11	12			11	12
ESPERANCE	10	10			10	10
EXMOUTH	3	3			3	3
FREMANTLE	35	41			35	41
GERALDTON**	8	9	12	56	20	65
KURI BAY	2	2			2	2
PORT HEDLAND	-	-			0	0
WYNDHAM	17	18	8	8	25	26
TOTAL	130	139	61	105	191	244

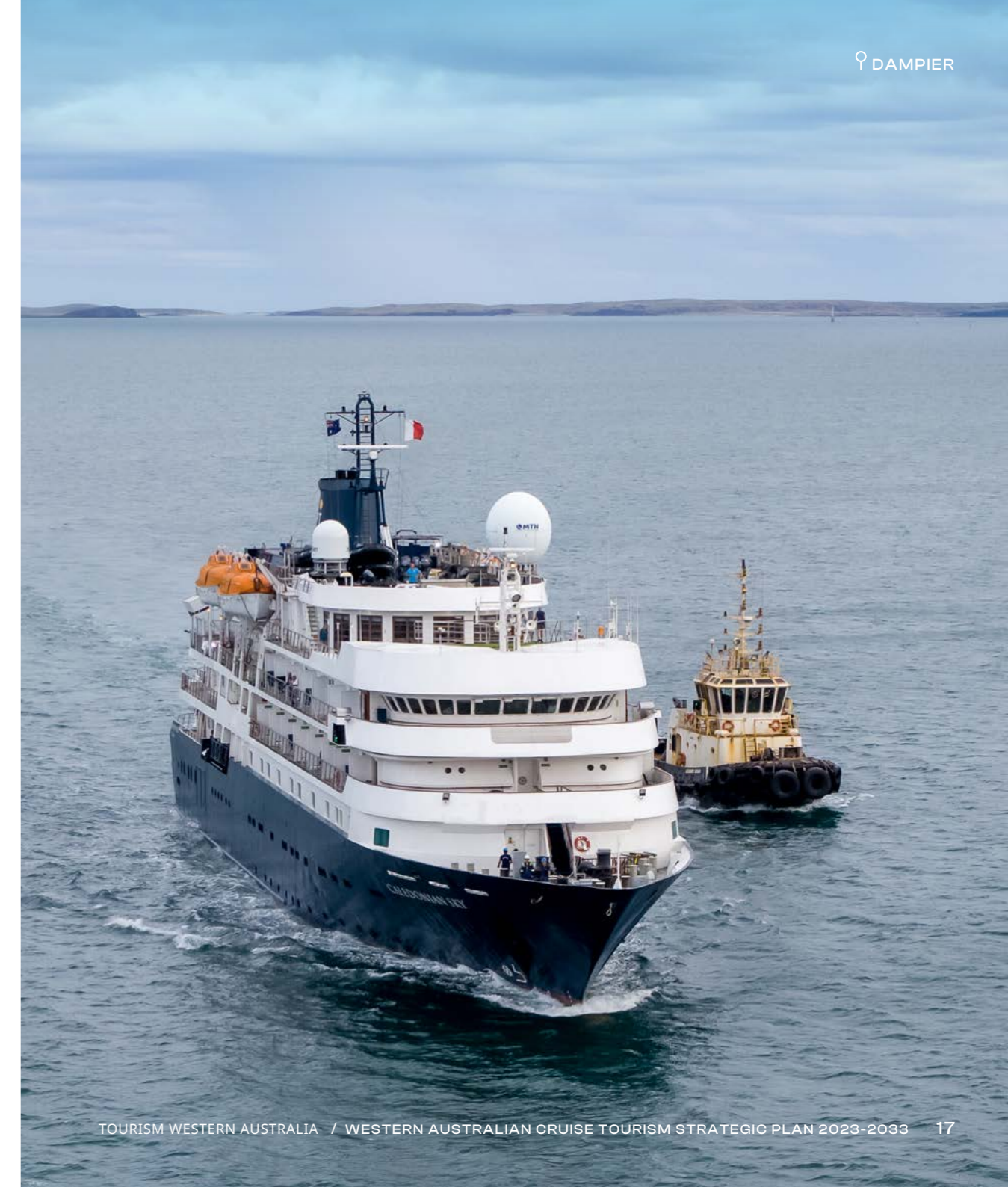
Note: * Broome is the home port for a range of micro-cruise vessels which have under 35 berths and are therefore not captured within this data set ** Geraldton is the home port of Australian micro cruise vessel Eco Abrolhos. Further statistics by port/destination for 2018-19 are provided in Appendix C.

Source: AEC (2020)

On 13 April, 2023, Dampier welcomed its first ever cruise ship visit, Caledonian Sky, an Australian Pacific Touring (APT) vessel with 99 passengers onboard. APT have scheduled future visits and there is growing interest in Dampier as a destination by other expedition cruise lines, in anticipation of Murujuga National Park becoming a World Heritage listed area.

The Western Australian Government is in the process of developing a Superyacht Industry Development Strategy. The focus in attracting the superyacht market comprises the construction, maintenance and refit of vessels, with the bonus being any resulting tourism activity. Tourism WA will implement actions where appropriate under this Strategy, once it has been finalised.

\$228.9M
The value of the cruise shipping sector in Western Australia for 2018-19.





FOCUS ON THE KIMBERLEY

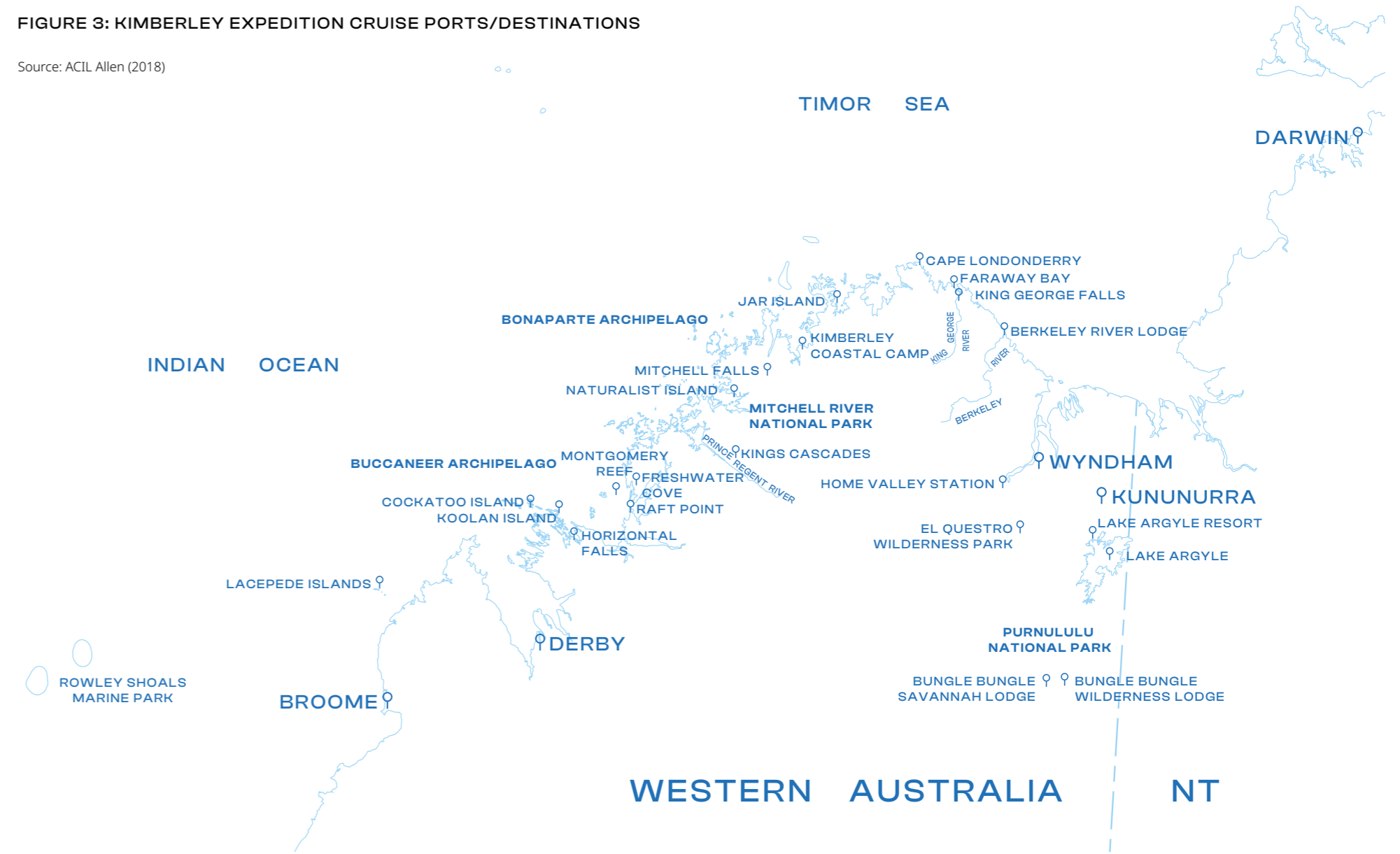
The Kimberley is an important region for the expedition cruise market. Expedition cruise ships frequently visit the Port of Broome and operate seasonally along the coast of Australia's North West between Broome and Darwin, visiting iconic locations such as Horizontal Falls/Garaan-ngaddim, Freshwater Cove, King George Falls and Wyndham.

ACIL Allen (2018) estimated that expedition cruise tourism directly generated \$24.3 million in Gross Value Added (GVA) to the Kimberley region in 2016-17. This included \$17 million from international cruise lines and the remainder by Australian operators. A further \$12.2 million worth of flow-on value added was generated, resulting in a total GVA to the Kimberley's economy of \$36.5 million in 2016-17. This level of activity supported 222 direct and indirect Full Time-Equivalent (FTE) jobs.

The growth in Kimberley cruising represents an opportunity to extend itineraries for the expedition cruise sector to grow economic benefits for other regions of Western Australia.

FIGURE 3: KIMBERLEY EXPEDITION CRUISE PORTS/DESTINATIONS

Source: ACIL Allen (2018)



THE STRATEGIC PLAN



SWOT ANALYSIS

TABLE 3: SWOT OF THE WA CRUISE TOURISM INDUSTRY

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> Diverse destinations and unique experiences and wildlife Large number of cruise destinations in Australia which helps to entice cruise lines to Western Australia Capacity at Fremantle to accommodate mega liners Mediterranean climate in the south and tropical climate in the north has the capacity to support ships all year round Extensive range of quality land and water-based activities and cultural experiences to satisfy the needs of a wide range of cruise passenger demographics World Heritage listed areas and marine parks that are accessible to cruise ship guests Western Australia being an aspirational and safe destination The Kimberley, Ningaloo and South West regions being widely known tourism destinations at the state and national level Only state to host a regular cruise industry workshop where cruise executives and product suppliers/ports meet 	<ul style="list-style-type: none"> On-ground visitor servicing under pressure to support larger cruise ship visitation in some regional destinations Insufficient regional marine infrastructure to adequately service large cruise vessels, especially in Exmouth and Esperance Tender ports being at mercy of seasonal weather conditions that can negatively impact itineraries Lack of general awareness of Western Australia's regional destinations in terms of facilities and capabilities Lack of understanding of licence approval process in Western Australia Lack of formal scheduling for expedition cruising in the Kimberley Diversity and capacity of shore excursion product in some regional areas Lack of passenger awareness of all Western Australian cruise destinations Lack of coach capacity and tour guides in some regional destinations Challenges in servicing shoreside demand in the Kimberley during the peak season 	<ul style="list-style-type: none"> Growing demand with more cruisers seeking unique and off-the-beaten-path destinations Port of Broome to become a First Point of Entry (FPOE) port Closest western destination to South East Asia (SEA), the world's fastest growing tourism source market Improve co-operation and co-ordination within Western Australia's cruise sector Capitalise on Western Australia's ability to deliver quality Aboriginal experiences to cruise ship passengers Expand and enhance destination product for shore excursions and pre and post-touring options Leverage benefits from an increase in home berthed ships in Australia, as ships are relocated to SEA/Australian waters Manage expedition ship visits to environmentally sensitive areas in the Kimberley The growth in expedition cruising globally and the opportunity to extend itineraries and economic benefits to regional areas outside of the Kimberley Increased engagement with Traditional Owners Investment in new marine berthing infrastructure in Broome with Kimberley Marine Support Base (KMSB) New itinerary development specifically beyond Fremantle and into SEA 	<ul style="list-style-type: none"> Strong global competition from other destinations potentially impacting cruise line deployment to Western Australia Availability and cost of marine grade oil and future fuels including biofuels, hydrogen and LNG Competition from other industry sectors for resources and investment Lack of clarity on Coastal Trading Act (2012) for small ships and inconsistency of licences being granted Cruise line ability to make profit from the destination Aborted calls due to unfavourable weather and/or lack of marine infrastructure Difficulty with infrastructure development approval process in environmentally sensitive areas The region's delicate ecosystems could be threatened by increased tourism and development The impact of vessels not securing marine park licences Western Australia is a remote region, which can make it challenging and expensive to access from other parts of the world WA's remote locations have limited infrastructure that could pose safety risks for cruise passengers in the event of an emergency The majority of Kimberley waters are unsurveyed posing risks for navigation Economic downturns or global events could impact tourism and the demand for cruises in Western Australia Ability to grow Broome to Wyndham expedition itineraries should Broome not secure First Point of Entry status and Wyndham not receive support for ad hoc exemptions



CRUISE DESTINATIONS - CURRENT & FUTURE STATUS

Key Western Australian cruise destinations have been identified as having the greatest influence on the future of cruise tourism in the state.

These destinations have been categorised into tiers to reflect their status and projected future status based on their ability to strategically impact the growth of the sector.

The tiering of ports is based on the following criteria:

1. Destination awareness among the cruise industry;
2. Port infrastructure and policy, including ship size, capacity, and passenger facilities, such as ground transport;
3. Industry capacity and ownership; and,
4. Shoreside destination experiences and proximity to attractions and amenities.

The Strategic Plan envisages that by 2027, Western Australia will offer two turnaround ports (Fremantle and Broome), and eight well established transit ports, and many other expedition-focused destinations with little to no infrastructure.

Destinations are categorised broadly as follows:

TIER 1 CRUISE DESTINATIONS are turnaround ports that score highly in the four criteria. That is, they have a high level of port infrastructure and passenger facilities to support visitation from large cruise ships, a high level of destination awareness by the cruise industry, a high degree of industry capacity and port infrastructure to support turnaround visits, maturity as a tourism destination to support cruise ship visitation, offering attractions, accommodation, activities, access, ground transportation, amenities, customs, security and immigration facilities. The destination is an international air gateway.

TIER 2 CRUISE DESTINATIONS score on average a medium rating across the four criteria. Therefore, they may have a high degree of port infrastructure to support visitation from cruise ships but lack sufficient tourism destination infrastructure, industry capacity or destination awareness by the cruise industry. Alternatively, the destinations may have a high level of destination awareness and industry capacity but lack the port infrastructure to rate highly across all four criteria.

TIER 3 CRUISE DESTINATIONS score on average a low rating across the four criteria. For example, while the port offers a medium level of infrastructure, the destination awareness may be low by the cruise sector, industry capacity is low, and the tourism destination infrastructure cannot service the market adequately.

TIER 4 CRUISE DESTINATIONS are generally suitable for expedition ships only, and may lack infrastructure. However, the destination awareness and industry capacity may be high, or alternatively is adequately serviced by the visiting cruise line.

TABLE 4: CURRENT STATUS OF WA CRUISE DESTINATIONS

PORT	DESTINATION AWARENESS BY CRUISE SECTOR	PORT INFRASTRUCTURE & POLICY	INDUSTRY CAPACITY & OWNERSHIP	SHORESIDE DESTINATION DEVELOPMENT	TIER RANKING
FREMANTLE	H	H	H	H	1
BROOME	H	M	H	H	2
BUNBURY	M	M	H	M	2
BUSSELTON	M	L	H	H	2
ALBANY	M	M	M	M	2
ESPERANCE	M	M	L	L	2
GERALDTON	M	M	M	L	2
EXMOUTH	M	L	L	L	3
PORT HEDLAND	L	M	L	L	3
DAMPIER	L	M	L	L	3
WYNDHAM	L	L	L	L	4

Note: H = High, M = Medium, L = Low. Not all Tier 4 expedition destinations are shown.

TABLE 5: ASSESSED AND PLANNED TIER STATUS FOR WA CRUISE DESTINATIONS

The following table shows each cruise destination's assessed 2023 tier status, and its planned tier status during the Strategic Plan timeframe at 2027 and 2033.

YEAR	TIER 1	TIER 2	TIER 3	TIER 4
2023	Fremantle	Albany, Broome, Bunbury, Busselton, Esperance, Geraldton	Dampier, Exmouth, Port Hedland	Wyndham
2027	Broome, Fremantle	Albany, Bunbury, Busselton, Esperance, Geraldton	Dampier, Exmouth, Port Hedland	Abrolhos*, Wyndham
2033	Broome, Fremantle	Albany, Bunbury, Busselton, Dampier**, Esperance, Exmouth***, Geraldton	Port Hedland	Abrolhos*, Wyndham

Note: * Abrolhos having been declared a marine park will develop jetty infrastructure suitable for small recreational/commercial/DBCA vessels and zodiacs/tenders. ** Establishment of Murujuga Cultural Landscape World Heritage Area and planned Tourism Precinct/Living Knowledge Centre will increase destination awareness. *** Exmouth will provide landside marine infrastructure for cruise berthing.

STRATEGIC DIRECTION

VISION

To be a unique world-class cruise destination that consistently exceeds visitor expectations while preserving the natural beauty and culture of Western Australia.

MISSION

To enhance Western Australia's economic growth through the promotion of diverse cruise destinations and exceptional tourism experiences. By influencing the economic, cultural, social and environmental contributions that cruise tourism makes to local communities, cruise passengers and cruise industry, the aim is to establish Western Australia as a unique world-class cruise destination, ensuring the sustainable long-term success of the sector.

APPROACH

Tourism Western Australia (Tourism WA) will lead the implementation of the WA Cruise Tourism Strategic Plan 2023 - 2033.

There has been significant progress in positioning Western Australia as a welcoming and desirable cruise destination through the implementation of the WA Cruise Tourism Strategic Plan 2012 - 2020. The Cruise WA Committee, Chaired by Professor Ross Dowling AM, was established in July 2012 to provide insights into the development

of the sector and support implementation of the cruise strategy. Going forward, the working group will maintain representation from WA Port Authorities, Local Government, Regional Tourism Organisations, relevant State Government agencies and stakeholders from the state's cruise destinations.

Tourism WA will maintain a focus on cruise line attraction by securing a range of cruise brands to visit the state, expanding the itineraries of cruise ships already visiting, and by attracting more seasonal home-ported vessels to call Fremantle home. This includes the attraction of mid-size, larger and expedition ships.

Port destinations will elevate the visitor experience, including the development of port welcome plans, delivery of cruise ready workshops, guide/volunteer training programs, and capacity building around shore excursions. This includes the development of product to meet the demographics of visiting cruise ships, and to consider the younger average age of cruise guests and growing interest in Aboriginal tourism experiences.

AEC Group (2020), estimated cruise ship passengers spend on average between \$173 and \$570 per day, depending on whether they are domestic or international visitors, and whether the ship they are travelling on is transiting or

home-porting in that destination. International visitors and those joining home-ported vessels have a greater impact on local economies due to a higher spend on pre/post cruise stays.

Larger vessels make an important economic contribution to Western Australia's largest port, Fremantle. Fremantle welcomes tens of thousands of guests annually, has the ability to home-port vessels on a seasonal basis, and can accommodate multiple ships at one time. It is estimated that every cruise ship visit to Fremantle generates approximately three additional regional port visits.

Mid-size and larger ships provide regional destinations with a significant economic injection within a short space of time (typically 7-8 hours). Cruise ship visits create excitement and a festive atmosphere within regional communities. Arrivals bring together volunteers, tourism operators, local government, the business community and the general public to proudly showcase the region and culture to visiting guests and crew.

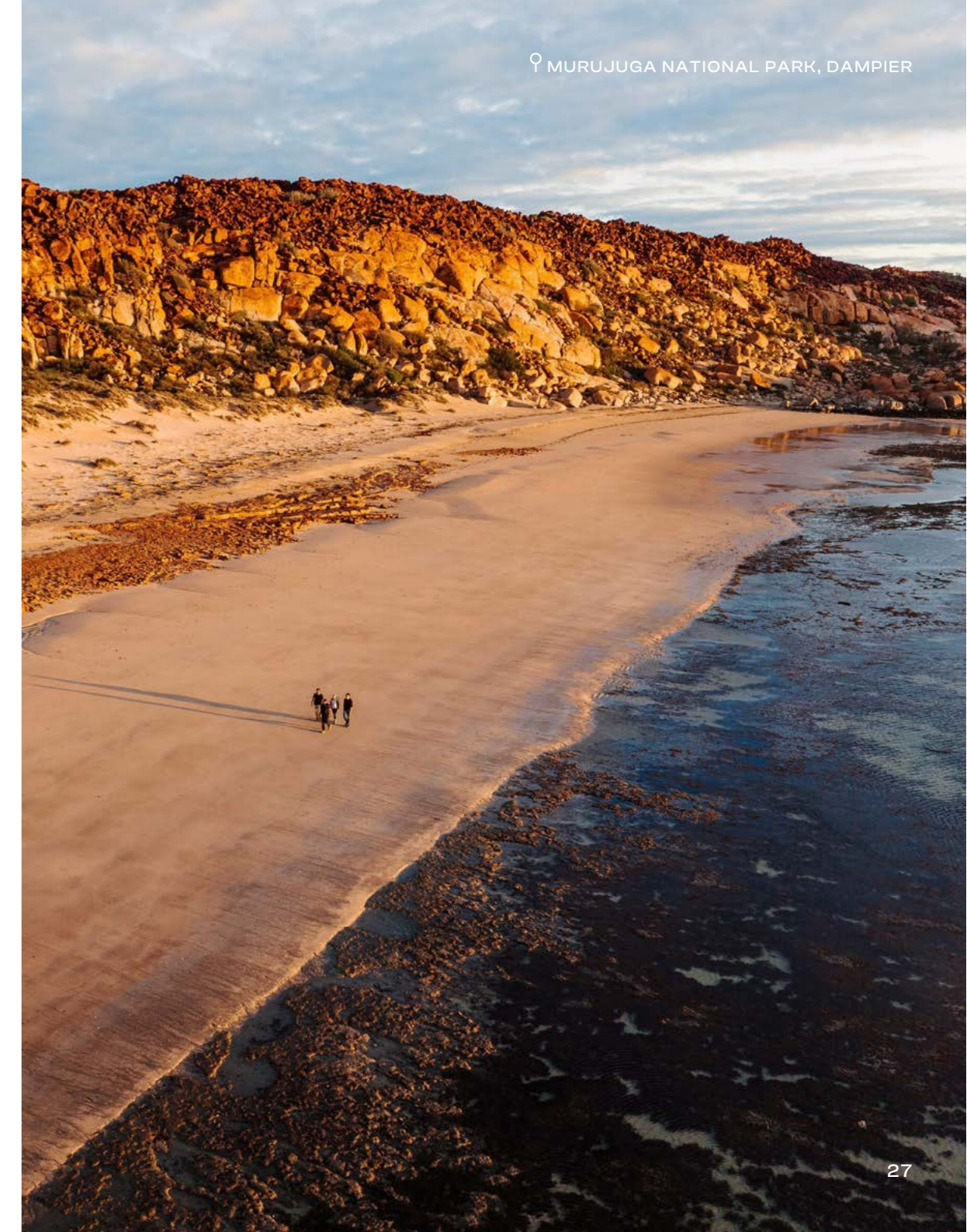
Expedition vessels are smaller and often ultra-luxurious ships carrying under 300 guests that undertake expedition/exploratory style itineraries. Expedition cruise line guests are often brand loyal, high value travellers typically seeking unique and authentic experiences.

The expedition market aligns well with Western Australia's brand, Walking On A Dream, which targets high yield travellers with marketing content that promotes Western Australia's attributes of time, space, connection and freedom.

The Kimberley region's remote terrain and uninhabited locations are well aligned with the aspirations of the expedition market seeking world class nature and wildlife, premium food and wine, stunning coastlines, and friendly hospitality.

The Kimberley must be preserved, and visitation managed with respect to vessel numbers, activities and safety to ensure the continuation of the very types of experiences passengers are drawn to this region for. Tourism WA supports and advocates the work being undertaken by the Department of Biodiversity, Conservation and Attractions (DBCA) and Traditional Owners (TOs) to sustainably deliver cruise itineraries in pristine locations and avoid overcrowding. This will be achieved by carefully managing vessel scheduling to support identified carrying capacities in jointly managed marine park locations.

Expedition cruise lines are encouraged to develop itineraries outside of the Kimberley region. The very nature of expedition cruising will often see these ships favouring visits to non-major ports. Itinerary planners tend to include isolated/remote anchorages and communities to deliver zodiac (inflatable boat) tours that can provide the exploratory attributes of an expedition cruise for their guests.



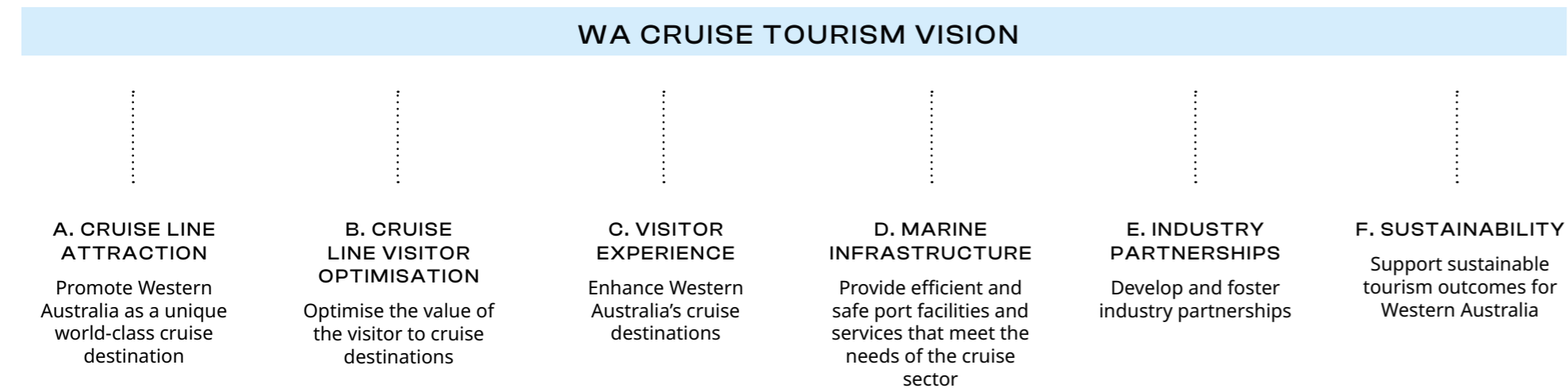
STRATEGIC PLAN FOCUS AREAS

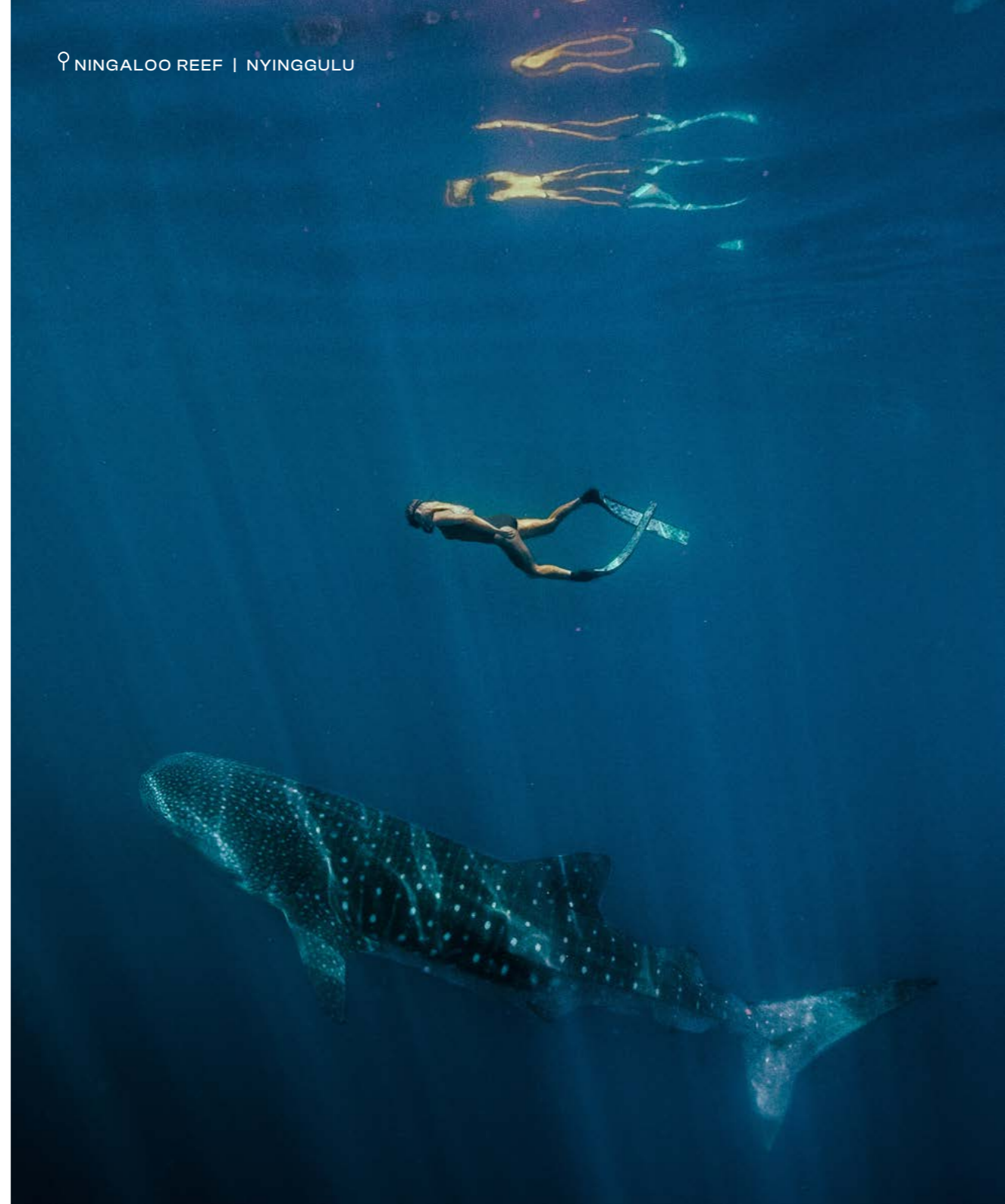
Six key focus areas have been identified to achieve the planned growth and development targets over the life of the Strategic Plan.

Each key focus area is considered in relation to:

- Importance -** The significance of and background of the key focus area.
- Goal -** The goals that the focus area is aiming to achieve.
- Measure/Target -** The measures and targets for each goal.
- Strategy -** The strategies to pursue to achieve the goal.
- Initiative -** The detailed initiatives to be undertaken to deliver each strategy and meet the goal.

FIGURE 4: KEY FOCUS AREAS





A: CRUISE LINE ATTRACTION PROMOTE WESTERN AUSTRALIA AS A UNIQUE WORLD-CLASS CRUISE DESTINATION

Importance

Increasing the number of cruise lines visiting Western Australia and the number of itineraries they undertake, brings more visitors to the state and boosts the economy. Attracting vessels to home-port in Western Australia has the most economic benefit to the state, through cruise lines purchasing fuel and provisions in Western Australia for forward journeys.

Attracting vessels to Western Australia encompasses educating cruise lines about destinations, experiences, marine infrastructure, port density, and on-ground capability. This is achieved through attending trade events and conferences, as well as bringing key decision makers to experience Western Australia first-hand for specific cruise events and on familiarisation visits. Attracting cruise lines to Western Australia also involves assisting with destination information, promotional material, itinerary suggestions, and regulatory requirements.

Goals, Targets, Strategies & Initiatives

GOAL	MEASURE/ TARGET	STRATEGY	INITIATIVE	RESPONSIBILITY	PRIORITY
A1 Attract cruise lines to Western Australia	Number of cruise lines visiting Western Australia Securing two home-ported vessels per annum for Fremantle A balanced approach to growth and volume of vessel numbers in line with destination carrying capacity	A1.1 Develop and implement cruise line attraction plan to position and market Western Australia as an attractive and sustainable cruise destination aligned to Tourism WA's brand	A1.1.1 Undertake traditional engagement activities including, but not limited to, trade events and conference participation	TWA	High
			A1.1.2 Deliver the annual Western Australian Cruise Exchange incorporating a product/experience update, a marine logistics information exchange, and a familiarisation program	TWA	High
			A1.1.3 Conduct a bespoke familiarisation program targeting key cruise line executives and itinerary planners	TWA	High
			A1.1.4 Develop and maintain brand-aligned cruise destination assets used to attract, inform and support cruise lines	TWA	High
			A1.1.5 Work with cruise lines, where required, to develop itineraries, incorporating options for turnarounds, transits and SEA links and include opportunities for shoreside sustainability initiatives	TWA, RTOs, LCCs, LGAs, Ground Handlers	High
			A1.1.6 Pitch Western Australia as a potential destination to two new cruise line brands annually	TWA	High
			A1.1.7 Raise awareness of regulatory requirements and provide connections to cruise lines wishing to enter the Western Australian market	TWA, DBCA	High
			A1.1.8 Bid for cruise industry trade and/or conference events where appropriate	TWA, BEP, LGAs	Medium
			A1.1.9 Implement actions where appropriate under the WA Government's Western Australian Superyacht Industry Development Strategy	TWA	Low
			A1.2 Attract more cruise lines to home-port vessels in Fremantle	A1.2.1 Consider incentives to attract new home-ported vessels to Fremantle	Fremantle Port Authority

B. CRUISE LINE VISITOR OPTIMISATION

OPTIMISE THE VALUE OF THE VISITOR TO CRUISE DESTINATIONS

Importance

It is important that Western Australia optimises the value of each cruise visitor to the state. This is achieved by increasing lengths of stay through pre and post cruise options in turnaround ports, which drives demand for additional visitor nights and encourages further spend. Visits by cruise passengers to port destinations can also drive significant return intention.

Goals, Targets, Strategies & Initiatives

GOAL	MEASURE/TARGET	STRATEGY	INITIATIVE	RESPONSIBILITY	PRIORITY
B1 Increase pre and post stays in Western Australia from cruise visitation	Audience reach/impressions	B1.1 Promote pre and post cruise stays in Western Australian turnaround ports	B1.1.1 Undertake marketing and promotional activities to raise awareness of, and position Western Australia as, a cruise destination in priority global markets.	TWA	High
	Number of partnerships where cruise product is represented		B1.1.2 Ensure cruise product is represented in cooperative marketing partnerships with key distribution partners, including pre and post stay extensions that encourage visitors to stay longer and disperse further.	TWA	High
			B1.1.3 Work with cruise lines, local tourism trade and ground handlers to develop and promote tailored shoreside offerings and experiences for crew	TWA	High



C: VISITOR EXPERIENCE ENHANCE WESTERN AUSTRALIA'S CRUISE DESTINATIONS

Importance

The visitor experience is a crucial element of success for cruise lines, visitors and the destination. Visitor satisfaction with a destination is a key decision metric for cruise lines when deciding which destinations to include on itineraries. Visitor satisfaction can be enhanced through visitor servicing infrastructure, compelling shore excursion options and experiences, by providing exceptional service and creating a positive visitor experience, improving accessibility and convenience for cruise passengers, and collaborating with local businesses.

The visitor experience can be improved by enhancing the infrastructure in destinations such as visitor centres, ground transport, and quality shore excursions. Similarly, enhancing existing and developing new shore excursion options that appeal to a broad range of cruise passengers is important. For Western Australia, there is also a specific desire to develop a greater number and diversity of Aboriginal cultural experiences.



Goals, Targets, Strategies & Initiatives

GOAL	MEASURE/ TARGET	STRATEGY	INITIATIVE	RESPONSIBILITY	PRIORITY	
C1 Enhance and expand the shoreside experience in Western Australian destinations	Customer satisfaction with destination	C1.1 Support each cruise destination to create the most optimal shoreside experiences for cruise passengers	C1.1.1 Support local cruise committees to develop destination welcome plans (non-port) for each cruise destination to identify gaps/opportunities to improve the welcome experience	TWA, LGAs, VCs, LCCs, RTOs, Port Authorities	High	
			C1.1.2 Advocate for the resources to meet destination improvements	TWA, LGAs, VCs, LCCs, RTOs, Port Authorities	Medium	
		C1.2 Enhance and support cruise ship welcome logistics including ground transport	C1.2.1 Identify limitations/challenges and work to deliver improvements specific to each cruise destination	TWA, LGAs, VCs, LCCs, Ground Handlers, Port Authorities	Medium	
			C1.3 Enhance existing and add new shore excursions that support destination attributes, building the density and diversity of cruise-ready experiences	C1.3.1 Conduct an audit of existing shore excursion product/experiences	TWA, RTOs, VCs, LCCs	Medium
				C1.3.2 Work with contracted product providers to improve customer satisfaction and experience offering	TWA, Ground Handlers	Medium
		C1.4 Encourage cultural engagement opportunities between cruise passengers and Aboriginal tourism providers to grow greater cultural awareness, understanding and respect for Country	C1.3.3 Encourage new, and link appropriate uncontracted tourism product and operators to ground handlers and travel intermediaries where identified gaps exist in experience offerings	TWA, RTOs, LCC, VCs	Medium	
			C1.4.1 Encourage and support Aboriginal tourism operators, communities and Aboriginal corporations to participate in the cruise tourism sector	TWA, WAITOC	Medium	
			C1.4.2 Encourage at least two new Aboriginal tourism experiences to be added to shore excursions annually	TWA, WAITOC	Medium	
		C1.5 Deliver a cruise education program	C1.4.3 In collaboration with relevant bodies, disseminate appropriate information about Aboriginal culture, traditions and visitation requirements to cruise lines and passengers	TWA, Ground Handlers	Medium	
			C1.5.1 Deliver at least three cruise-ready workshops with identified stakeholder groups each year	TWA	Medium	
		C1.5.2 Deliver a tour guide/volunteer training program	TWA	Medium		



Photo Credit: Pilbara Ports Authority

D: MARINE INFRASTRUCTURE PROVIDE EFFICIENT AND SAFE PORT FACILITIES AND SERVICES THAT MEET THE NEEDS OF THE CRUISE SECTOR

Importance

If cruise tourism is to grow in Western Australia, then improvements to existing port infrastructure, including filling infrastructure gaps in the network of ports along the coastline, need to be made. These improvements will increase capacity to accommodate larger and more diverse cruise ships, enhance itinerary development, improve the passenger experience, increase revenue for local businesses, and improve cruise line profitability. Community satisfaction levels will improve with increased frequency of visits and a reduced likelihood of aborted calls due to adverse weather.

Port authorities have strategic planning processes that address potential infrastructure initiatives, as referenced in this strategy, and it is essential that cruise shipping needs are considered.

A game-changer would be for Broome to become a designated First Point of Entry (FPOE) port. This will enable cruise lines to deliver itineraries directly from South East Asia.

Goals, Targets, Strategies & Initiatives

GOAL	MEASURE/TARGET	STRATEGY	INITIATIVE	RESPONSIBILITY	PRIORITY
D1 Develop and enhance marine facilities in Western Australia to meet the needs of cruise ships and their passengers	Fewer aborted calls due to adverse weather	D1.1 Prepare and support a cruise tourism marine facilities infrastructure investment plan	D1.1.1 Develop investment business cases for public marine facility upgrades to meet cruise tourism needs, including: <ul style="list-style-type: none"> Fremantle wharf/fendering infrastructure upgrades Geraldton dedicated cruise berth (although likely beyond the timeframe of this Plan) Moorings in the Abrolhos Upgrade passenger transit shed at Albany's Berth 1 to better suit cruise ship needs Other regional port destination upgrades as identified in Port Authority plans Support private sector in navigating timely construction of the Kimberley Marine Support Base (KMSB) in Broome and marine berthing facility in Exmouth	Port Authorities, DoT, DPIRD, JTSI, Project Proponents	High
		D1.2 Develop infrastructure to support sustainability requirements of cruise lines	D1.2.1 Develop investment business cases for public marine facility upgrades to meet cruise tourism sustainability needs, including: <ul style="list-style-type: none"> Bunkering Shoreside power Others as identified 	Port Authorities, DoT, DPIRD	Medium
D2 Establish Broome as a First Point of Entry (FPOE) port	Achieve FPOE status	D2.1 Advocate Broome as a FPOE port	D2.1.1 Invest in the infrastructure and other requirements to secure FPOE designation for the Port of Broome	Kimberley Port Authority	High

E: INDUSTRY PARTNERSHIPS

DEVELOP AND FOSTER INDUSTRY PARTNERSHIPS

Importance

Industry partnerships help address challenges such as improving infrastructure, enhancing the passenger experience, promoting sustainability, and generating economic benefits for local communities. By building strong and resilient partnerships, Western Australia can create a more attractive and competitive destination for cruise lines and passengers, supporting economic growth and development and creating a sustainable and prosperous cruise tourism industry for future generations.

Goals, Targets, Strategies & Initiatives

GOAL	MEASURE/TARGET	STRATEGY	INITIATIVE	RESPONSIBILITY	PRIORITY
E1 Foster and maintain important industry partnerships for Western Australia	Maintained and operational	E1.1 To have a peak cruise ship industry advisory committee for Western Australia	E1.1.1 Maintain a Cruise WA working group that is representative of industry, is a united voice, and advocates for raising the profile of the cruise industry in Western Australia	TWA	High
		E1.2 Partnerships with peak cruise industry bodies	E1.2.1 Maintain memberships of Australian Cruise Association (ACA) and Cruise Line International Association (CLIA)	TWA	High
			E1.2.2 Collaborate with Tourism Australia and other State Tourism Organisations (STOs) to ensure alignment of cruise tourism related activities, where appropriate	TWA	Medium
E2 Communicate the value of Western Australia's cruise tourism sector	Dissemination of information through Tourism WA initiatives	E2.1 Share information about cruise tourism to the broader Western Australian community and tourism industry	E2.1.1 Communicate the economic, social and cultural benefits (including sustainability practices) of cruise tourism to the broader Western Australian community and tourism industry	TWA	High
			E2.1.2 Prepare an annual snapshot of cruise tourism for Western Australia and disseminate where appropriate	TWA	High

F: SUSTAINABILITY

SUPPORT SUSTAINABLE TOURISM OUTCOMES FOR WESTERN AUSTRALIA

Importance

Sustainable tourism addresses the economic, environmental, social and cultural needs of the visitor, the industry, and local communities. Sustainability is increasingly influencing travellers in terms of destination choice, modes of travel, accommodation selection and experiences they engage with.

The WA Government has a commitment to work with all sectors of the economy to achieve net zero by 2050 through the Western Australia Climate Policy.

Goals, Targets, Strategies & Initiatives

GOAL	MEASURE/TARGET	STRATEGY	INITIATIVE	RESPONSIBILITY	PRIORITY
F1 Align cruise tourism with Western Australian tourism sustainability goals	Cruise tourism within state tourism sustainability goals	F1.1 Ensure the incorporation of cruise sector within the broader tourism sector sustainability targets, actions and monitoring	F1.1.1 Align to national and state tourism sustainability policies as they are developed and evolve	TWA	Medium
F2 Deliver sustainable cruise tourism at Western Australian destinations	Cruise tourism is within destination carrying capacity	F2.1 Understand, assess and establish cruise passenger carrying capacity at destinations	F2.1.1 Ensure cruise lines consider and align to marine park visitor plans for itinerary planning and scheduling	DBCA, TWA, Cruise Lines	High
			F2.1.2 Keep records of cruise ship visits, passengers and crew days in port/destination	Port Authorities	Medium
			F2.1.3 In consultation with cruise lines and other jurisdictions, research a suitable scheduling system for Kimberley marine parks, and other required locations, and implement as appropriate	DBCA, TWA, Cruise Lines	High

MEASUREMENT, GOVERNANCE & REVIEW



PERFORMANCE BENCHMARK

The table below outlines Western Australia's performance in 2018 - 19 in terms of cruise ship visits, economic impact and employment.

TABLE 6: PERFORMANCE BENCHMARK 2018-19

PERFORMANCE CRITERIA	CRUISE SHIP (> 35 PAX)
NUMBER OF UNIQUE VISITING CRUISE SHIPS	18
NUMBER OF HOME-PORTED SHIPS IN FREMANTLE	2
NUMBER OF CRUISE SHIP VISITS (>100 PAX)	130
NUMBER OF CRUISE SHIP VISITS (35-100 PAX)	61
TOTAL NUMBER OF CRUISE SHIP VISITS (>=35 PAX)	191
TOTAL INDUSTRY EXPENDITURE (DIRECT)	\$109.3M
TOTAL INDUSTRY ECONOMIC OUTPUT	\$228.9M
TOTAL INDUSTRY EMPLOYMENT	848 FTEs

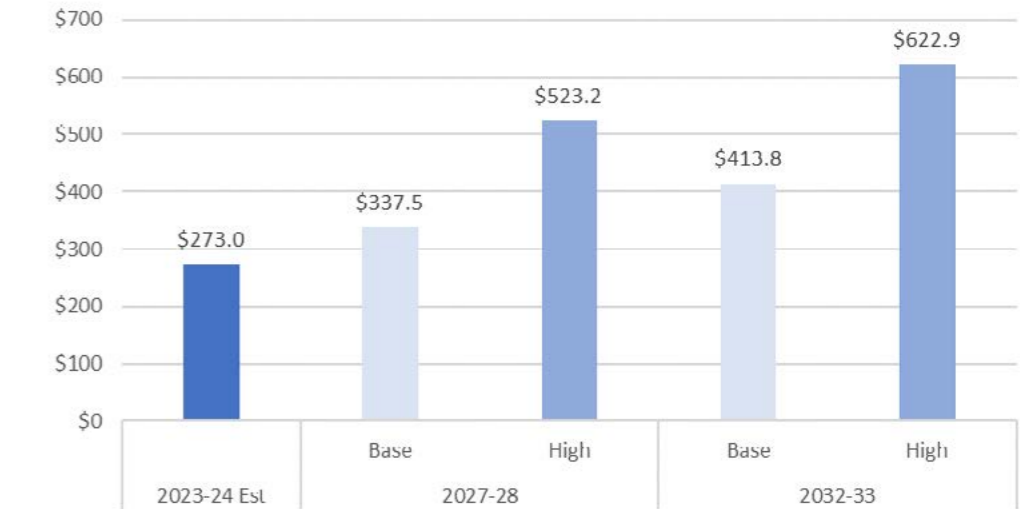
Notes: Cruise ship visits include visits to all WA ports; FTE = Full Time Equivalent.
Source: AEC (2020)



STRATEGIC PLAN TARGETS

Base and high targets for 2032-33 were calculated using 2023 - 24 scheduled cruise ship visits as a foundation. Base targets used assumptions for passenger, crew and ship expenditure as well as transit, turnaround and home-ported ship visit numbers. High targets reflected the impact of key infrastructure developments being delivered in Broome and Exmouth.

FIGURE 5: STRATEGIC PLAN TARGETS



Source: AEC

\$410-\$620M

The Western Australia Cruise Tourism Strategic Plan 2023-33 seeks to increase the total economic output of the cruise shipping sector from an estimated \$273 million in 2023-24 to between \$410 million and \$620 million by 2033.

PERFORMANCE MEASUREMENT

The table below outlines actual, estimated and projected performance indicators. Results will be monitored and reported annually over the life of the Strategic Plan.

TABLE 7: PERFORMANCE INDICATORS: ACTUAL, ESTIMATED & PROJECTED 2018-19 TO 2032-33

PERFORMANCE CRITERIA	2018-2019	2023-2024	2027-2028 BASE	2027-2028 HIGH	2032-2033 BASE	2032-2033 HIGH
TOTAL NUMBER OF CRUISE SHIP VISITS (>=35 PAX)	191	225	245	290	265	306
TOTAL INDUSTRY EXPENDITURE (DIRECT)	\$109.3M	\$130.3M	\$161.1M	\$249.8M	\$197.5M	\$297.3M
TOTAL INDUSTRY ECONOMIC OUTPUT	\$228.9M	\$273M	\$337.5M	\$523.2	\$413.8M	\$622.9M
TOTAL INDUSTRY EMPLOYMENT	848 FTEs	962 FTEs	1,143 FTEs	1,772 FTEs	1,347 FTEs	2,028 FTEs

Notes: 2018-19 figures are actual, 2023-24 are estimates, 2027-28 and 2032-33 (base & high) are projected; FTE = Full Time Equivalent.

Source: CLIA (2020), AEC



STRATEGIC PLAN GOVERNANCE

Tourism WA is the lead agency for the delivery of the Western Australian Cruise Tourism Strategic Plan 2023 - 33 and will work collaboratively with other departments and industry stakeholders. Tourism WA's Board of Commissioners will have oversight and governance of the strategies and initiatives relating to Tourism WA's delivery commitment.

Strong governance and reporting practices will be adopted to ensure the Strategic Plan is implemented in a timely manner and remains responsive to changing circumstances.

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Koomal Dream
Cultural Experi

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APPENDIX A DEFINITIONS & ACRONYMS

DEFINITIONS

TEAM	DEFINITION
Micro Cruise Ship	Cruise ship with < 35 pax
Expedition Cruise Ship	Cruise ship with between 35 and 300 pax
Mid-size Cruise Ship	Cruise ship < 1500 pax
Larger / Mega Cruise Ship	Cruise ship > 1500 pax
Visit days	Number of days a cruise ship is in a port/destination

ACRONYMS

ACRONYM	TERM
ACA	Australian Cruise Association
BEP	Business Events Perth
CLIA	Cruise Line Industry Association
CWAC	Cruise Western Australia Committee
DBCA	Department of Biodiversity, Conservation & Attractions
DPIRD	Department of Primary Industry & Regional Development
DoT	Department of Transport
FPOE	First Point of Entry
GVA	Gross Value Added
ITO	Inbound Tourism Operator
JTSI	Department of Jobs, Tourism, Science & Innovation
KMSB	Kimberley Marine Support Base
LCC	Local Cruise Committee
LGA	Local Government Authority
LNG	Liquefied Natural Gas
RDC	Regional Development Commission
RTO	Regional Tourism Organisation
STO	State Tourism Organisation
TWA	Tourism Western Australia
VC	Visitor Centre
WAITOC	Western Australian Indigenous Tourism Operators Council



APPENDIX B

CRUISE TOURISM INDUSTRY STAKEHOLDERS

The major stakeholders of the Western Australia cruise tourism industry include:

- **Cruise ship** passengers and potential passengers.
- **Cruise lines** currently operating in Australia and potential new cruise lines.
- **Australian Cruise Association (ACA)**, the Australian peak cruise industry association charged with growing and developing the Australian Pacific region as the world's leading cruise destination providing economic, social and environmental benefits.
- **Cruise Line Industry Association (CLIA)**, the world's largest cruise association dedicated to the promotion and growth of the cruise industry.
- **Shipping Agents** that handle the operational aspects for cruise lines while cruise ships are in port.
- **Inbound Tour Operators (ITOs, Ground Handlers)** who develop and operate shore excursions in Australia and generate revenue for tourism operators and cruise lines from the sale of shore excursions.
- **Regional Development Commissions (RDCs)** and other **State Government Agencies** which can provide local support and may assist with infrastructure assessments and local co-ordination.
- **Port Authorities** that provide marine infrastructure and manage the arrival and departure of cruise vessels.
- **Port Facility and Service Providers** including retail businesses and transport or tour providers.
- **Local, Regional, State and National Tourism Authorities**, cruise committees and business groups that assist and support industry in implementing this Strategic Plan.
- **Local Government Authorities (LGAs)** across the state which play a vital role in facilitating numerous on-ground services and amenities to assist in providing cruise passengers with a comfortable and enjoyable visitor experience.



APPENDIX C WESTERN AUSTRALIA CRUISE TOURISM STATISTICS 2018-19

	WESTERN AUSTRALIA	ALBANY	BROOME	BUNBURY	BUSSELTON	ESPERANCE	EXMOUTH	FREMANTLE	GERALDTON	KURI BAY	WYNDHAM
CRUISE SHIP VISITS											
Visits (>100 pax)	130	14	27	3	11	10	3	35	8	2	17
Visits (35 to 100 pax)	61	-	41	-	-	-	-	-	12	-	8
Total visits (>35 pax)	191	14	68	3	11	10	3	35	20	2	25
Visit days (>100 pax)	139	14	27	3	12	10	3	41	9	2	18
Visit days (35 to 100 pax)	105	-	41	-	-	-	-	-	56	-	8
Total visit days (>=35 pax)	244	14	68	3	12	10	3	41	65	2	26
PASSENGERS & CREW											
Passenger Days in Port	127,360	14,051	15,133	4,110	11,103	8,877	1,861	59,538	8,933	1,287	2,467
Crew Days in Port	22,003	3,511	3,391	592	632	2,075	119	8,728	1,962	82	911

Note: 2018-19 was the last full year of cruise tourism activity prior to the industry pausing in March 2020 due to the global pandemic. Port Hedland received no visits in 2018-19.

Source: AEC (2020)

	WESTERN AUSTRALIA	ALBANY	BROOME	BUNBURY	BUSSELTON	ESPERANCE	EXMOUTH	FREMANTLE	GERALDTON	KURI BAY	WYNDHAM
ECONOMIC IMPACT											
OUTPUT (\$M)											
Direct	\$109.26	\$2.15	\$7.26	\$1.31	\$1.65	\$0.92	\$0.18	\$88.58	\$6.58	\$0.16	\$0.46
Indirect & Induced	\$119.64	\$2.05	\$7.26	\$1.67	\$1.71	\$1.01	\$0.18	\$99.96	\$5.22	\$0.15	\$0.44
Total	\$228.90	\$4.20	\$14.52	\$2.98	\$3.36	\$1.93	\$0.36	\$188.54	\$11.80	\$0.31	\$0.90
WAGES INCOME (\$M)											
Direct	\$36.97	\$0.59	\$2.10	\$0.55	\$0.48	\$0.31	\$0.05	\$31.42	\$1.31	\$0.04	\$0.12
Indirect & Induced	\$29.45	\$0.51	\$1.79	\$0.41	\$0.42	\$0.25	\$0.05	\$24.61	\$1.28	\$0.04	\$0.11
Total	\$66.42	\$1.09	\$3.89	\$0.96	\$0.90	\$0.56	\$0.10	\$56.03	\$2.59	\$0.08	\$0.22
EMPLOYMENT (FTES)											
Direct	470	5	21	3	10	3	1	416	9	0	2
Indirect & Induced	378	6	23	5	5	3	1	317	17	0	1
Total	848	11	44	8	15	6	2	733	26	0	3
VALUE ADDED (\$M)											
Direct	\$57.92	\$1.11	\$3.78	\$0.74	\$0.85	\$0.49	\$0.09	\$47.28	\$3.27	\$0.08	\$0.23
Indirect & Induced	\$65.51	\$1.12	\$3.97	\$0.91	\$0.93	\$0.56	\$0.10	\$54.74	\$2.85	\$0.08	\$0.24
Total	\$123.43	\$2.23	\$7.76	\$1.66	\$1.78	\$1.05	\$0.19	\$102.01	\$6.12	\$0.17	\$0.47

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