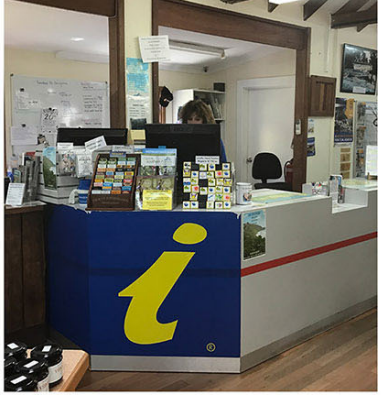

WBAC VISITOR SERVICING BUSINESS PLAN

COMMISSIONED BY WARREN BLACKWOOD ALLIANCE OF COUNCILS | DECEMBER 2016

THE STAFFORD GROUP

WARREN BLACKWOOD ALLIANCE OF COUNCILS

Shire of Bridgetown-Greenbushes .... simply beautiful

SHIRE OF MANJIMUP

Shire of Nannup rest • connect • grow

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1. EXECUTIVE SUMMARY

1.1. Executive Summary

The Stafford Group (The Group) was commissioned by Warren Blackwood Alliance of Councils (WBAC) to undertake a Visitor Servicing Business Plan covering its member councils of Bridgetown-Greenbushes, Manjimup and Nannup.

Importantly, this exercise was undertaken independently of a restructuring proposal to encourage a local tourism organisation (LTO) to be established to offer a single desk approach for delivery of tourism services throughout the WBAC region. This LTO model is a model already activated in surrounding regions. It is proposed by WBAC that visitor servicing (and the visitor centres) would come under a new LTO structure.

1.2. Key Findings

Based on the research and consultation undertaken, the following key findings are noted:

- There are a variety of differences between each of the six visitor centres (VCs) which operate within the WBAC region. The VCs in Manjimup Local Government Area (LGA) are individually operated by not-for-profit organisations with part funding for staff and some ancillary costs provided directly by the Shire of Manjimup, Bridgetown-Greenbushes VC is co-located with a social history museum and the Brierley Jigsaw Gallery and operated by the Shire of Bridgetown-Greenbushes, whilst Nannup's VC is contracted out to a retailer to provide visitor services as part of a service contract arrangement.
- Four of the VCs are accredited (Bridgetown-Greenbushes, Northcliffe, Pemberton and Walpole-Nornalup) whilst two are not (Manjimup and Nannup[1]).
- There are issues associated with the robustness of official visitor data for the LGA's and into the WBAC regional generally.
- Actual visitation to the VCs has been assessed and refined after meetings, follow up discussions and a review of data.
- The important role which VCs play, particularly for smaller communities is noted and recognised, though the true cost of providing visitor services is not fully known.
- Based on the financial reports provided to The Group:
  - Bridgetown-Greenbushes VC generates, on a per visitor basis, $3.34 in gross profit, $10.49 in expenditure and the net loss of delivering the service equates to -$8.86 per visitor. The Bridgetown-Greenbushes VC financials are useful because they highlight the full cost of supporting infrastructure such as buildings, fittings and furniture and their associated depreciation rates, along with the full cost of utilities and apportionment of overhead costs.
  - Manjimup VC generates $1.92 in gross profit, $1.60 in expenditure and produces a net surplus of $0.32 per visitor.
  - Northcliffe VC produces, on a per visitor basis, $3.33 in gross profit, $2.82 in expenditure and generates a net surplus of $0.53 per visitor into the VC.
  - Walpole-Nornalup VC produces, on a per visitor basis, $2.11 in gross profit, $3.11 in expenditure and generates a net loss of -$0.15 per visitor into the VC.

[1] Though we note Nannup is working towards achieving accreditation.

- Whilst digital services (internet, websites and mobile apps) are limited in many areas[2] due to poor connectivity in internet provision, it is noted that the NBN rollout is anticipated into parts of the region in 2017[3] which could have a dramatic effect on how information is sourced and updated and which would offer many online solutions.
- The WBAC region is large but the population base is relatively small and the number of industry operators is subsequently small as well which creates pressure on LGs to support visitor services traditionally. We note that for many VCs which operate with industry members, the level of industry support and membership is low.
- We understand that the Margaret River LTO derives an attractive revenue stream from operating the caves attraction and is looking at contracts to offer services for the airport as well. This allows the LTO to be far more independent than if it was required to source most of its funding from LGs or members. In the absence of a commercial attraction to derive revenue from, the proposed LTO model will need a stronger commitment from LGs and members.
- Road directional signage throughout the WBAC region was found to be generally good, though there was little gateway signage to illustrate one is entering the WBAC region[4] and virtually no interpretative signage, to encourage travellers to stop and better understand the region and its sites of significance.

1.3. Visitor Service Models to Consider

Whilst WBAC has received advice on the establishment of an LTO to bring tourism services together, the notion of best practice ways of delivering visitor services specifically has been looked at with or without an LTO organisation applied. However, it is important that, if an LTO is to be established, for which visitor services are expected to be part of that:

- an agreed equitable way of funding visitor services and related VCs is determined which, in other locations, would more often be via a per capita contribution; and
- any financial commitment from LGs to support visitor services, and VCs specifically, needs to be ring-fenced rather than provided to an LTO as part of a consolidated funding arrangement to protect the funding for visitor services specifically.

The following are four models offered as options for consideration, with or without an LTO structure established.

Model 1 – Centralised Visitor Servicing Model	Model 1 - an umbrella centralised visitor servicing model whereby as many functions as practically possible are coordinated and delivered by a centralised body to help minimise cost, to create consistency in service delivery and to offer a quality standard service to consumers and industry.
Model 2 – LG Co-Location Model	Model 2 - focuses on co-location actively encouraging any VCs to be collocated with compatible organisations such as the community resource centres, libraries, art galleries and museums, by way of example, and allowing for the investigation of co-location with appropriate State Government bodies such as DPAW.
Model 3 – Digital Visitor Servicing Model	Model 3 - a digital visitor servicing model which reflects the introduction of quality internet services and a move by consumers as well as businesses into web-based and associated information sourcing solutions and away from traditional brick and mortar centres.

[2] Though we note town centres and VCs all have adequate services (based on feedback from WBAC).
[3] Though this rollout is not guaranteed.
[4] There is a need for more prominent gateway signage and a signage bay with interpretive material as visitors enter the WBAC region south of Walpole and north of Bridgetown-Greenbushes. There is a need for this signage to focus on the WBAC region rather than separate LGA boundaries. The collective product offering is far stronger and visitors do not recognise LGA boundaries. With limited major visitor attractions the need for a collective regional approach is all the more important.

Model 4 – Rationalisation Model	Model 4 - a rationalisation model which looks to acknowledge the gateway locations of some of the VCs but identifies digital and other ways to deliver services rather than through dedicated VCs.

There are a variety of benefits and costs relating to each of the various models. It may well be that a hybrid model offers the most palatable way forward if an agreement on any one model is not possible amongst the three LGs and WBAC.

1.4. Recommendations

We make the following recommendations based on a variety of assumptions. In saying so, we appreciate that some assumptions might require further refinement and, therefore, might nullify some options.

- It is assumed that the NBN rollout will occur in the next 1-3 years[5] into the WBAC sub-region offering good internet coverage and the opportunity for a digital platform to deliver visitor services to most of the sub-region. In the interim, there will be a need to encourage those without good connectivity to utilise libraries and CRC which may be able to provide this.
- There is a desire by LGs, as the funding body (in different forms) for VCs to look at ways of collocating visitor services, even if these options have been attempted before but have been unsuccessful.
- Whether an LTO is established or not, the focus of visitor services needs to be on delivering quality information in advance (via a quality website) and within the sub-region, via a variety of visitor facilities, and digital-based solutions; so, a mix of both online and on the ground.
- A model which centralises as many of the back of house support functions and requirements including compliance needs should be part of a new model going forward as it will help with quality control to benefit communities, visitors, industry operators and LGs.
- The simple rationalisation of VCs is unlikely to lead to an improved level of visitor service delivery until such time that digital-based solutions are able to be provided comprehensively across the entire WBAC sub-region, including via technology in the form of touch screens, etc.
- None of the above, however, obviates the benefit of having quality volunteer-based ambassadors, well trained and able to support visitor enquiries, particularly during events and peak holiday periods.

The true cost of visitor services is only able to be determined once all costs (including the opportunity cost of providing Peppercorn rental accommodation) are identified. The assessment we have provided shows however, and based on our experience elsewhere, an indication of what some of the true cost is likely to be.

In addition, it is likely that under some of these models, it will be possible to reduce a number of expenditure items and therefore reduce overall VC operating costs. In turn, this may allow VCs and/or the entity formed to coordinate their delivery, to apply any VC cost savings to stronger online marketing and promotional campaigns which can also encourage greater industry/operator participation.

With respect to visitor road signage, consideration should be given to enhanced gateway signage for those entering from the north via Bridgetown- Greenbushes and from the south at Walpole. Where possible, consideration should also be given to

[5] Though this rollout is not guaranteed.

introducing interpretative signage which may need to be developed around lay-bys and easily accessible visitor attractions such as walking trail access points, unique flora changes and areas of more significant geology.

1.5. Additional Factors Considered

Though outside of the brief for this visitor services business plan review, The Group received information on challenges associated with the lack of a major visitor attraction within the WBAC region and the appetite amongst some stakeholders to try and create one.

We see a major challenge being that an estimated 80 - 85% of the land area of the WBAC region is held in either national park or conservation reserve land with limited ability to introduce commercial tourism activities. There is, therefore, relatively limited sites to provide opportunities and, in addition, the financial risks associated with this are likely to be significant. When the commercial development sector perceives an opportunity is real, they are likely to pursue this. In the interim, it would be useful for the WBAC region to undertake the development of a destination management plan (working with ASW who can provide a sound foundation for marketing) to provide a detailed evaluation of current product as well as product gaps and the potential for new experiences and initiatives which could be identified and promoted for the future.

In conclusion, we note the pride which many stakeholders involved in VCs have in relation to their ability to offer a variety of services and product to meet visitor needs. This needs to be acknowledged and commended. Technology, however, is going to be able to provide cost effective ways of delivering information faster and on a more regular basis to a visitor market who is well experienced and conditioned to using websites and other digital information to find out about places of interest and other important visitor information. Being ready and prepared to meet this opportunity, rather than perceiving it as a threat, is an important outcome which each of the VCs within the sub-region needs to be thinking about.

1.6. Conclusion

Based on the available information and our assessment of current and future visitor servicing needs, we would suggest that the preferred model which the three LGs and WBAC should now consider is an amalgam of the models recommended, a Hybrid Model. The preferred model would therefore ideally include:

- all back of house functions (accounting, procurement, IT, marketing, HR systems, administrative functions) to be centralised;
- the introduction of a dynamic destination website to replace the 10 existing destination and VC websites across the two sub-regions of Blackwood River Valley and Southern Forests and including the use of touch screen technology introduced in select locations;
- co-location of VCs with other appropriate facilities to share costs and benefits; and
- whilst we acknowledge the value to local communities of having a “shop window” to reflect the uniqueness of the towns where VCs are currently located and as an important element of community pride, there should be the introduction of a digital based information program to offer stronger online information and promotion, and which reflects the growing consumer preference for more online data solutions.

Whilst we consider that the actual quantum of visitors into some of the VCs in the WBAC sub-region is higher than in other destinations as a percentage of total visitation, there is still close to 80% - 85% of visitors who may not walk into most VCs in the region. Offering quality, reliable information to all visitors is an essential outcome which needs to be aimed for.

Finally, with respect to the need to adapt and enhance visitor services for the future, there is a need for greater destination marketing, a stronger digital presence and a higher level of industry buy in and support. Therefore, whilst the current estimate of

operating costs of VCs across the WBAC sub-region may appear to be inexpensive, the status quo does not appear to be offering optimum outcomes. To achieve the optimum outcome, there is a need for far greater cooperation amongst those offering visitor services across the WBAC sub-region.

2. INTRODUCTION

2.1. Overview

The Stafford Group (The Group) was commissioned by the Warren Blackwood Alliance of Councils (WBAC or the Alliance) to develop a Business Plan for Visitor Servicing (the Plan) for its member councils of Bridgetown-Greenbushes, Manjimup and Nannup. The Plan is being developed to:

- identify an optimum way of delivering visitor services;
- assess roles and responsibilities and how this relates to a Local Tourism Organisation (LTO) structure and resource sharing;
- identify operational efficiencies and industry engagement;
- determine the resources and delivery tools required to ensure visitor services are delivered in the most optimal way; and
- offer a timeline and budget for implementation of recommendations.

With respect to visitor servicing, this Plan focuses on:

- visitor centres (VCs);
- onsite information points; and
- online information.

As consumer needs and expectations are evolving, trends for the way visitors access information are shifting from a traditional focus utilising VCs to accessing information/booking prior to arriving, or whilst in a destination via smartphones etc.

It is important to note, however, that VCs, particularly in regional areas, do play an important role in helping to disperse visitors and provide important information on trail/road conditions and road access information etc. Additionally, some markets such as the Grey Nomads, whilst they are increasingly “tech savvy” do often prefer the “face to face” interaction which VCs can provide.

There is, therefore, a careful balance required to ensure visitor services are delivered in the most optimal way.

2.2. Methodology

The Group has undertaken broad industry research and consultation to determine the level of support for visitor services within the WBAC sub-region and to ascertain what the needs are of industry and the community in the future.

As part of this Plan, the following methodology was applied:

- Discussions were undertaken with WBAC to refine the brief, the project scope and reconfirm the overall methodology for the Plan.
- A literature review was undertaken, based on background data and reports provided by WBAC, as well as other data sourced via desktop research.
- Interviews were held with a number of stakeholders involved in visitor information servicing in the WBAC region in order to gather feedback regarding current challenges to visitor information servicing and future opportunities that may exist.
- The Group applied research on consumer feedback regarding the influence of WA VCs on tourist behaviour conducted by Tourism Research Australia (TRA) in 2015.

- The Group also applied research on consumer feedback regarding the use of VCs in the Sunshine Coast region which was undertaken in mid-2010 (see Supporting Documentation 2 for a summary of key survey findings).
- A range of models for optimising visitor services in the WBAC region were identified and tested with stakeholders.
- Based on feedback and prioritisation of the models, a preferred model for delivering visitor services was identified.
- This draft was completed and forwarded to WBAC for feedback.
- After feedback is received from WBAC, any additions or changes will be completed.

Various stakeholders provided follow-up information and data to assist in this exercise. We wish to express our thanks to all those who contributed and who provided the time to meet when we were in the region.

3. CONTEXT

3.1. About the Warren Blackwood Alliance of Councils

The WBAC, a voluntary regional organisation of LGs, was formed in 2001 following the restructure of the timber industry. The purpose of the Alliance is to work as a collective body on issues affecting areas within the Warren and Blackwood catchments. It covers the local government areas (LGAs) of Bridgetown-Greenbushes, Manjimup and Nannup.

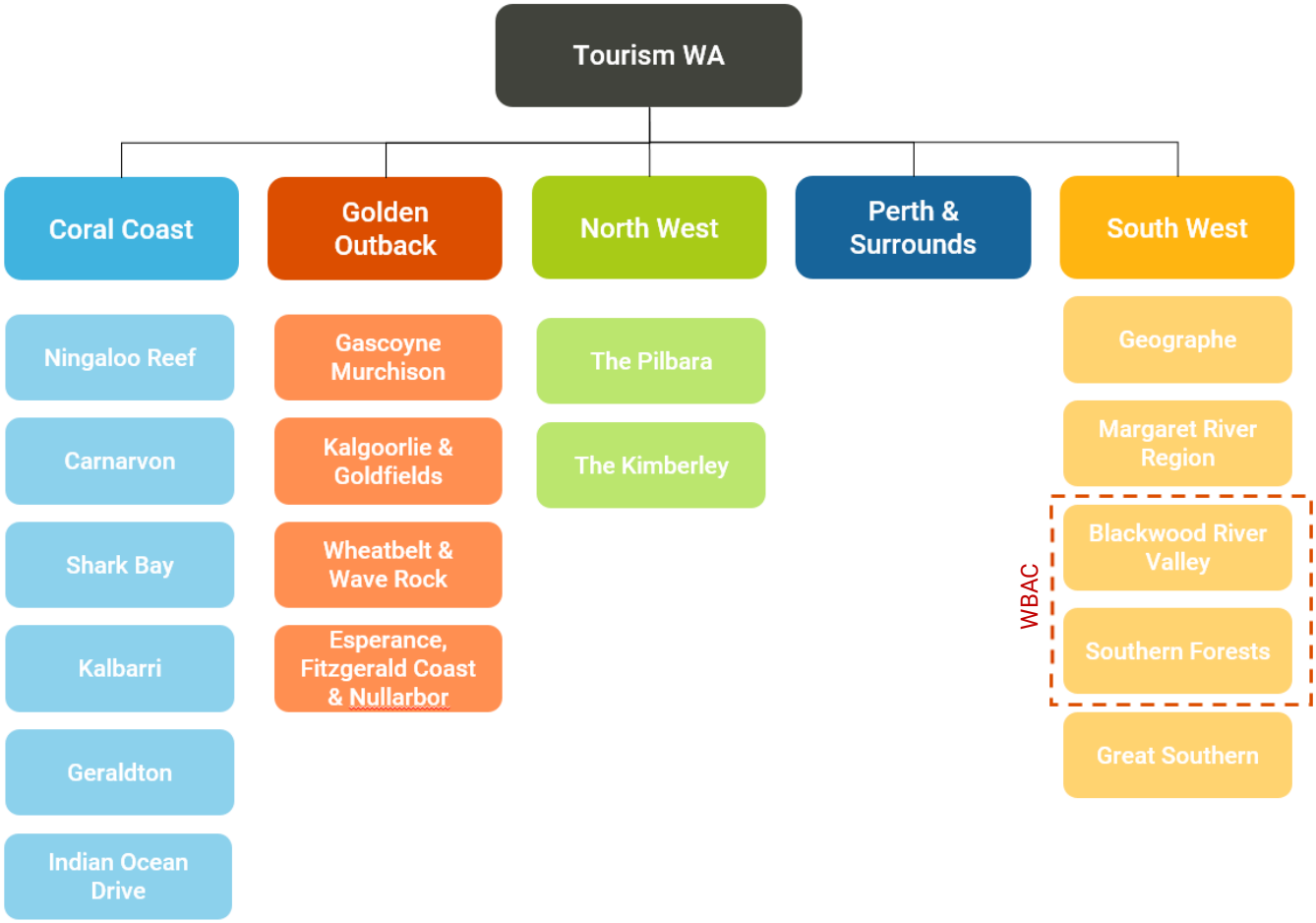
In total, the WBAC region covers an estimated 11,672 km^2. The region's north access point, Greenbushes, is approximately a 2-hour 40-minute drive from Perth. Major towns situated within the WBAC region include Bridgetown, Greenbushes, Manjimup, Nannup, Northcliffe, Pemberton and Walpole.

Figure 1: Map of WBAC

Within Tourism Western Australia's regional network[6], WBAC falls within Australia's South West (ASW) region. ASW also has several sub-regions (outlined in Figure 2 below), and, WBAC falls within the Blackwood River Valley[7] and Southern Forests sub-regions.

Importantly, whilst Southern Forests only includes one LGA (Manjimup), Blackwood River Valley comprises three: Bridgetown-Greenbushes, Nannup as well as the Boyup Brook. This is important to note because Boyup Brook is not a member of the WBAC.

Figure 2: Western Australia Tourism Regions and Sub-Regions



[6] http://www.westernaustralia.com/au/Destinations/Pages/Destinations.aspx
[7] It is important to note, however, that, in addition to covering the LGAs of Bridgetown-Greenbushes and Nannup, the Blackwood River Valley region also covers the Shire of Boyup Brook. We understand that the Shire of Boyup Brook used to be part of the WBAC alliance but left a few years ago.

Figure 3 below provides an overview of the sub-regions within the ASW region and outlines the Blackwood River Valley (in green) and the Southern Forests (in red) sub-regions. It highlights the location of the significant visitor destinations in the Margaret River and Albany especially and what we see as the subsequent challenge of the Southern Forests and Blackwood River Valley sub-regions getting heard when surrounded by large and active visitor destinations.

Figure 3: ASW Tourism Sub-regions

3.2. The Visitor Centres

Within the WBAC region, there are six VCs, each of which operates under varying management structures. The following table provides a summary of each VC (a more comprehensive overview of each VC is included in Section 6 of this Plan).

Table 1: Brief Overview of the VCs

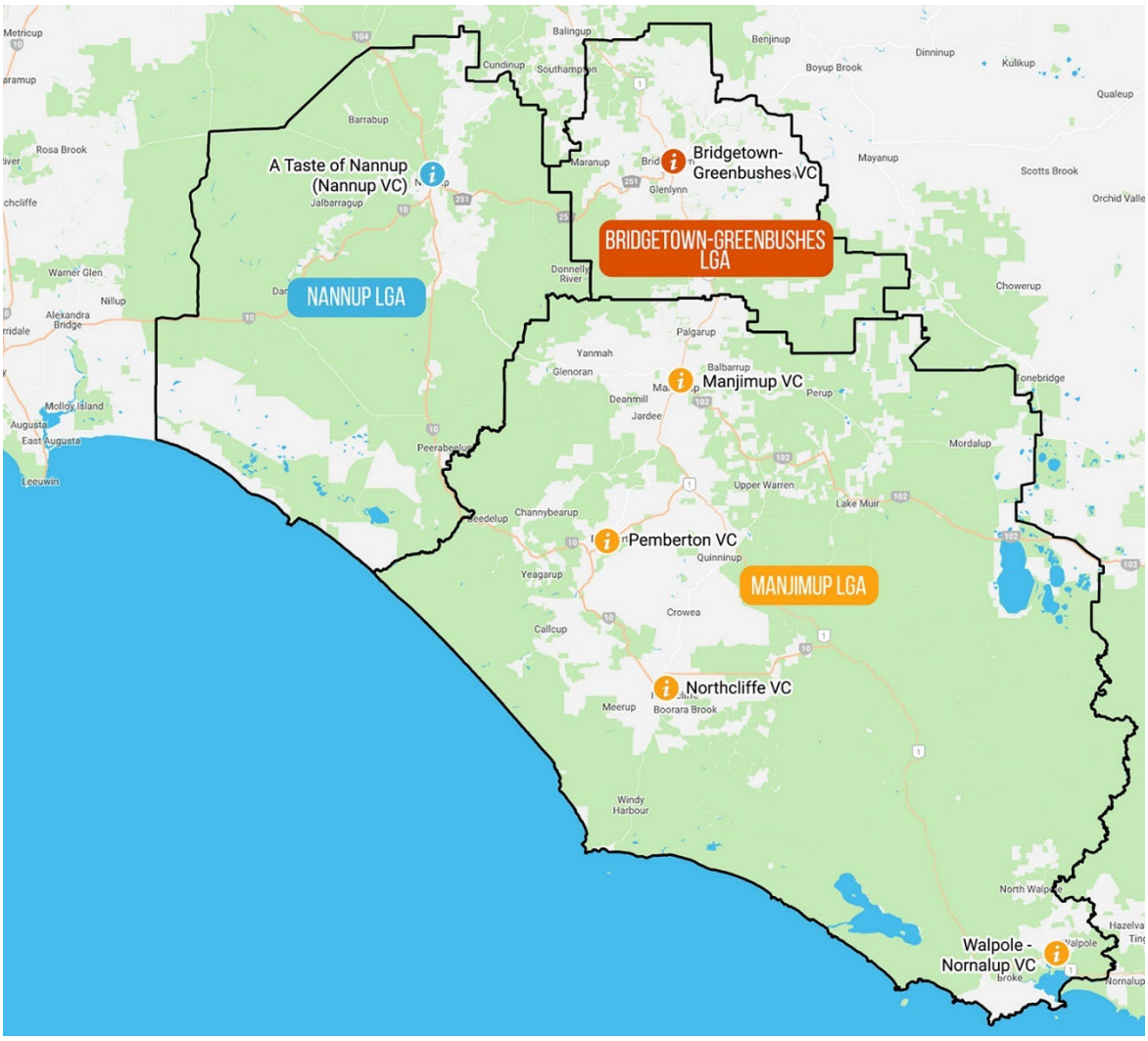
Visitor Centre	LGA	Operating Structure	Accreditation
A Taste of Nannup (Nannup VC)	Nannup Shire	▪ Co-located with retail outlet ▪ Managed by retailer with grant from the Shire of Nannup	Not accredited but accreditation application is underway.
Bridgetown-Greenbushes VC	Bridgetown-Greenbushes Shire	▪ Managed by the Shire of Bridgetown-Greenbushes ▪ Co-located with Brierley Jigsaw Gallery	Accredited
Manjimup VC	Manjimup Shire	▪ Not-for-profit managed by independent board ▪ Receives fee for service from the Shire of Manjimup and peppercorn rent	Not accredited
Pemberton VC	Manjimup Shire	▪ Not-for-profit managed by independent board ▪ Initial plans to amalgamate with Northcliffe VC ▪ Shared manager with Northcliffe VC ▪ Receives fee for service from the Shire of Manjimup and peppercorn rent	Accredited
Northcliffe VC	Manjimup Shire	▪ Not-for-profit managed by independent board ▪ Initial plans to amalgamate with Pemberton VC ▪ Shared manager with Pemberton VC	Accredited

Visitor Centre	LGA	Operating Structure	Accreditation
		▪ Receives fee for service from the Shire of Manjimup and peppercorn rent	
Walpole-Nornalup VC	Manjimup Shire	▪ Not-for-profit managed by independent board ▪ Receives fee for service from the Shire of Manjimup and peppercorn rent	Accredited

Figure 4 provides an overview of the location of the six VCs in WBAC and demonstrates that whilst the LGA's of Nannup and Bridgetown-Greenbushes have one VC each, Manjimup LGA has four separate VCs located throughout the local government area (LGA). Four of the VCs might be viewed as "gateway VCs". These are:

- Nannup VC (which is a 45-minute drive from the Margaret River and a day trip destination);
- Bridgetown-Greenbushes VC which is the northern gateway to the WBAC region on Highway 1;
- Pemberton VC as it has direct access to Augusta, Margaret River and Busselton via the Vasse Highway; and
- Walpole VC which is the southern gateway on Highway 1.

Figure 4: Location of VCs[8]



[8] Data sourced from: ABS; © Open Street Map & Contributors; MapSurfer.NET

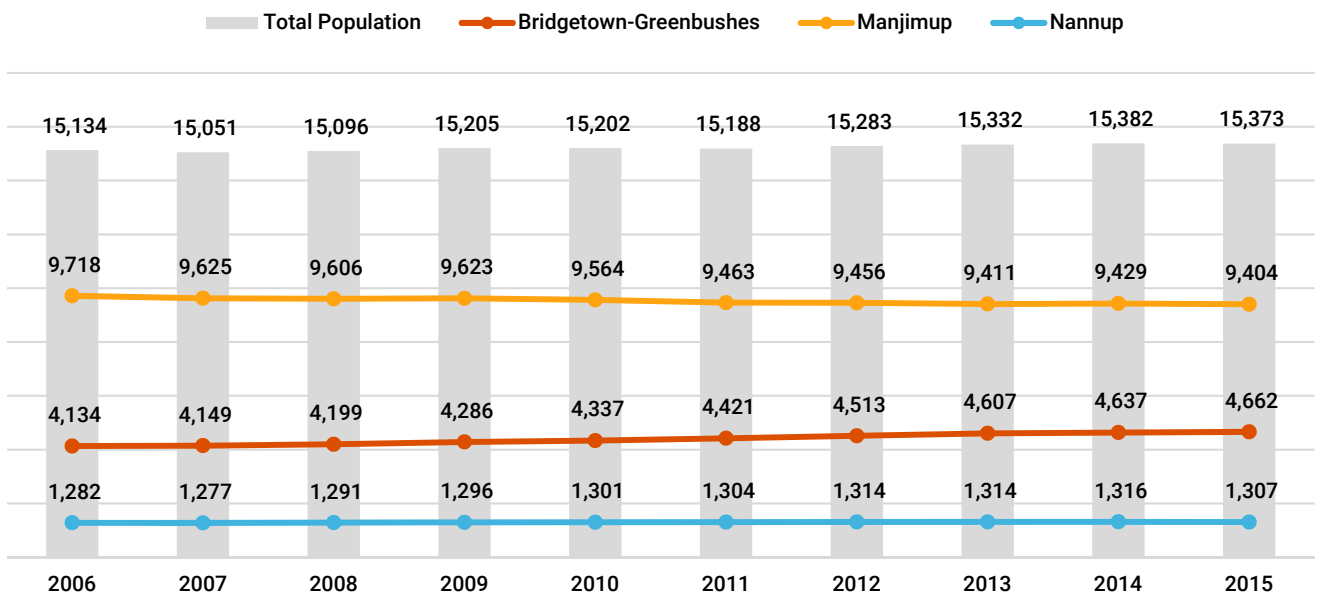
3.3. Population

Figure 5 below provides a summary of the population of the WBAC region over the period 2006 – 2015. This demonstrates the following:

- The total population of the WBAC region has remained relatively static over the 10-year period assessed, increasing slightly from 15,134 residents in 2006 to 15,373 residents in 2015 (an increase of 239 residents or 1.6% growth).
- Whilst the LGA's of Bridgetown-Greenbushes and Nannup experienced a small increase in their resident populations (1.4% and 0.2% average annual growth respectively), Manjimup experienced a slight decline, falling by, on average, 0.4% per annum over the 10-year historic period assessed.
- In total, Manjimup's population fell from 9,718 (2006) residents to 9,404 (2015) residents, whilst Bridgetown-Greenbushes' population grew from 4,134 to 4,662 (528 residents, or, 13% growth) residents and Nannup's population increased from 1,282 to 1,307 residents (25 residents, or, 2% growth).

The slight reduction in Manjimup's population could potentially be attributed to the decline of the timber industry, with anecdotal feedback indicating that some residents have had to relocate from the LGA for alternative employment[9] whilst others commute to Manjimup from the neighbouring Shire of Bridgetown-Greenbushes. We also understand that the timber mill in Pemberton, who is a major employer in the town, is closing and some of the 60 workers have been offered employment in the timber mill in Greenbushes (1 hour away). We merely highlight this as there are significant trickle down effects if these workers and their families choose to relocate out of the town (which has an estimated population of 1k residents) to be closer to their place of work, or, to seek alternative work, which would impact on schools, retail, town vibrancy etc.

Figure 5: WBAC Population, 2006-2015[10]



[9] Strategic Plan, 2016-2019, Warren Blackwood Alliance of Councils
[10] Estimated Resident Population, Local Government Areas, Western Australia, 30 March 2016, ABS

3.4. Visitation

3.4.1. Australia's South West and Sub-Regions

3.4.1.1. Total Visitation

Figure 6 on the following page provides an overview of visitation to Western Australia, the ASW region as well as the sub-regions within the ASW region. It demonstrates the following:

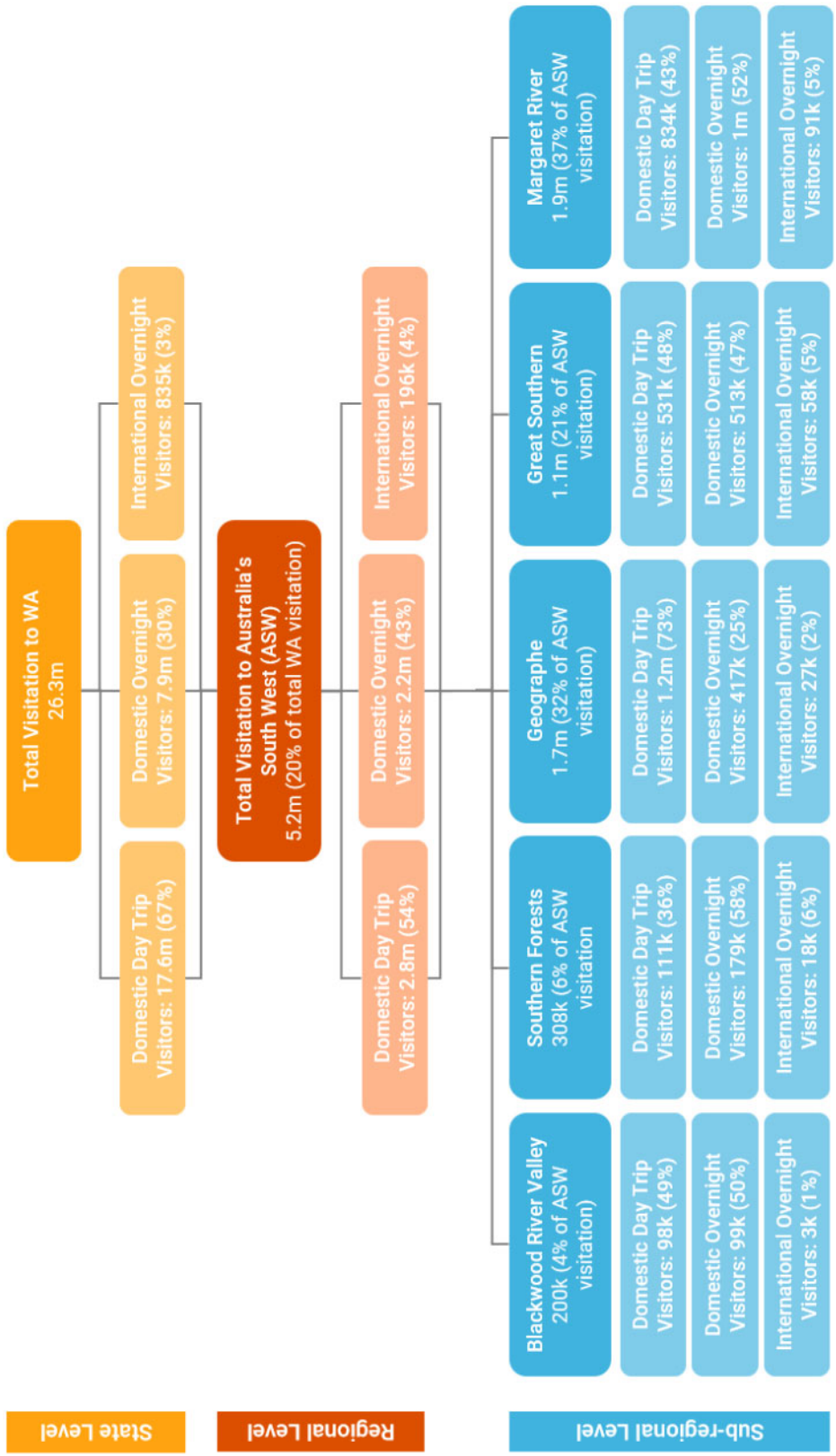
- The ASW region is estimated to capture approximately 20% of total visitation to WA. The majority of these visitors are domestic day trippers (54%), followed by domestic overnight visitors (43%) and international overnight visitors (4%).
- Out of the five sub-regions within the ASW region, the Margaret River sub-region captures the greatest share of visitation, receiving an estimated 37% of visitors. This Is followed by the Geographe sub-region (32%), Great Southern (21%), Southern Forests (6%) and Blackwood River Valley (4%).

It is important to note that from a regional level down, there are some discrepancies when deriving data from a "top-down" approach[11]. The Group has, therefore, gathered data via a "bottom-up" approach, that is, building a picture of visitation to the ASW region using LGA visitation data and combining this to achieve total visitation to each sub-region, and, totalling this to determine visitation to the ASW region as a whole. This is important to note because whilst Tourism Research Australia (TRA) data estimates visitation at 5.97m for the ASW region, when visitation to each LGA within the ASW region is individually assessed[12] and several assumptions were applied for gaps which exist[13], this figure appears to be closer to 5.2m visitors.

This analysis has been undertaken to better estimate visitation to the WBAC region and to look at the percentage of visitors to each of the VCs in the WBAC region.

[11] Splitting data from state, down to regional, sub-regional and LGA
[12] Based on 4 year averages to 2014 by TRA (TRA Local Government Area Profiles, 2014 - http://tra.gov.au/Tourism_in_Local_Government_Areas_2016/LGA_Profiles)
[13] Some small LGAs do not have visitor data available. To fill these gaps, The Group spoke with a range of stakeholders, completed accommodation audits and estimated visitation based on this.

Figure 6: Visitation Overview[14]



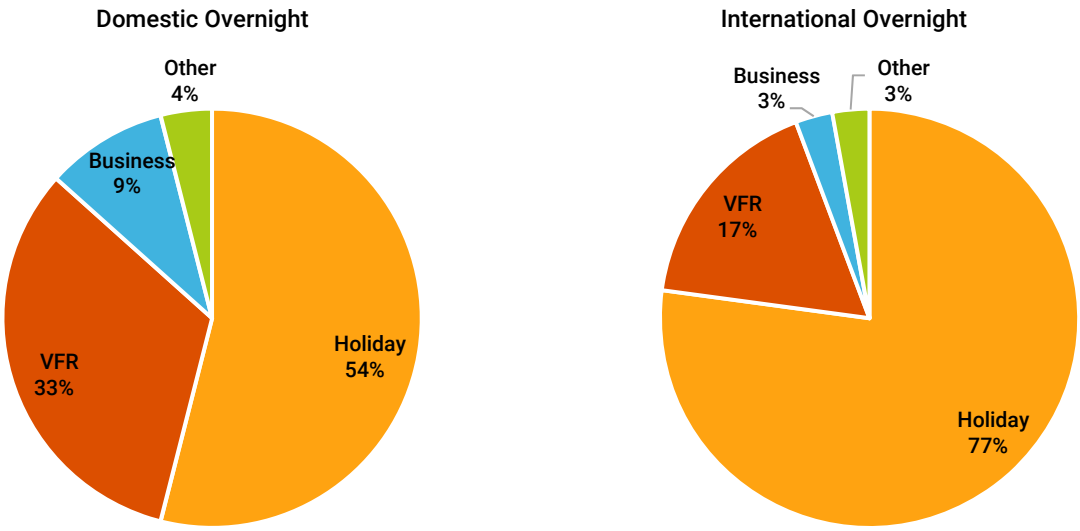
[14] **WA level data:** Fast Facts Year Ending June 2015, Tourism Western Australia;
Regional Level data: Built up from LGA and sub-regional visitor statistics
Sub-Regional Level data: Built up from 2014 LGA visitor statistics from TRA (TRA Local Government Area Profiles, 2014), consultation with stakeholders, national parks visitation and accommodation audits and occupancy assessments.

3.4.1.2. Purpose of Visit

The following figure provides a summary of the purpose of visit for overnight visitors[15] to the ASW region. It demonstrates that most overnight visitors to the ASW region are leisure visitors (holiday or VFR markets), comprising over three-quarters of total overnight visitation to the region across the intrastate, interstate and international markets.

Importantly, however, when interpreting Figure 7, one needs to be cognisant of the fact that the data is for the entire ASW region, which includes the Margaret River. We note the Margaret River has a far larger visitor market and the purpose of visitation for Margaret River visitors is likely to differ significantly from the LGAs within the WBAC region. By way of example, we note the WBAC region has a strong business visitor market and, therefore, the split between leisure and business travellers is likely to differ. No empirical data exists, however, to understand this split.

Figure 7: Purpose of Visit for Overnight Visitors (2015)[16]



[15] Purpose of visit for domestic day trippers was not available
[16] Overnight Visitation Purpose of Visit to South West Region

3.4.2. WBAC Visitation

Figure 8 on the following page provides a further breakdown of visitation to the ASW region, including visitation to the Blackwood River Valley and Southern Forests sub-regions as well as a breakdown of estimated visitation to the WBAC region. This analysis is important to help understand what visitor servicing requirements exist and the size of the visitor market estimated into the WBAC region.

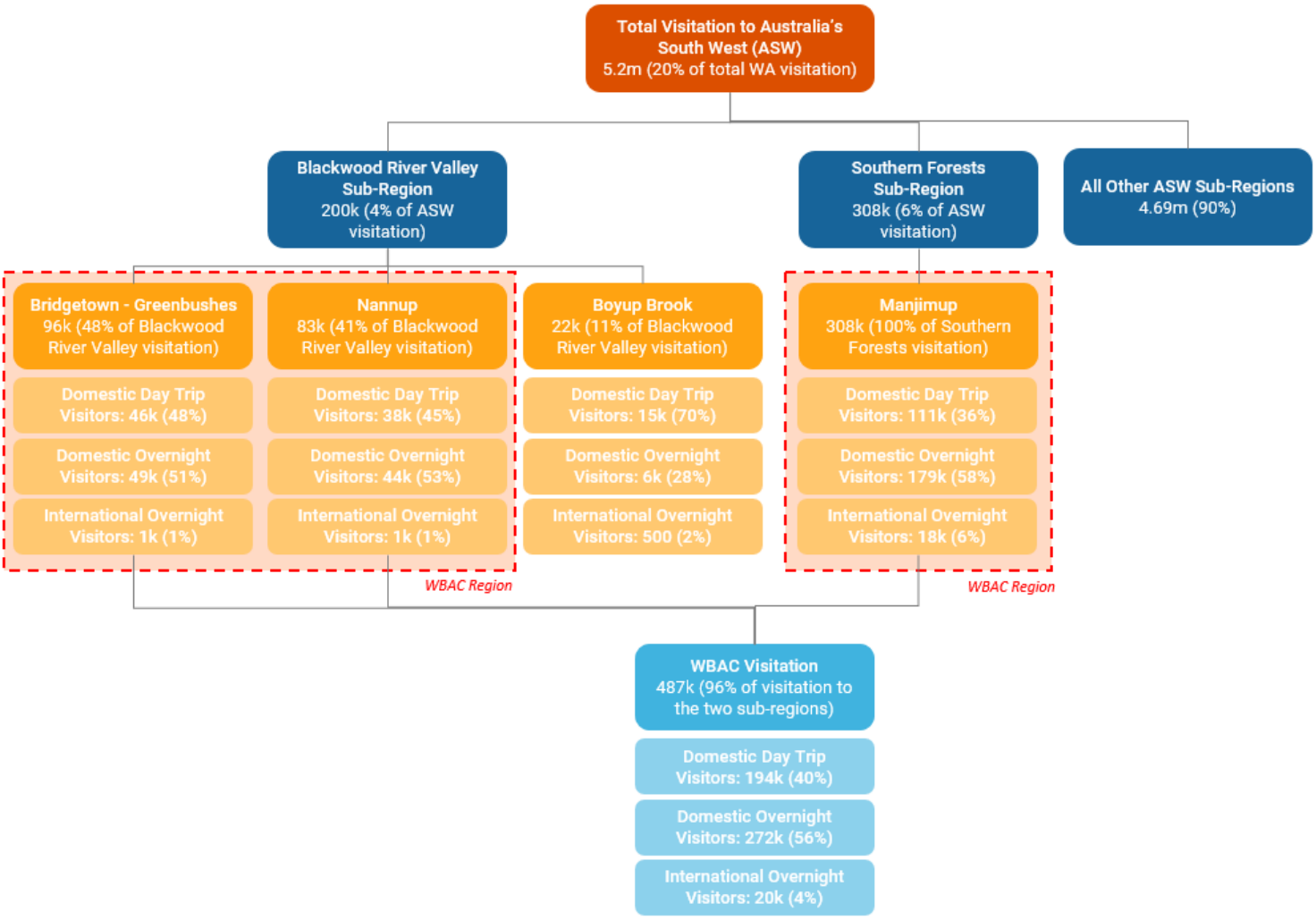
This demonstrates the following:

- Within the Blackwood River Valley sub-region, Bridgetown-Greenbushes LGA receives the greatest number of visitors, estimated at 96k visitors (48% of total sub-regional visitation). This is followed by Nannup (83k visitors or 41% of sub-regional visitation) and Boyup Brook (22k or 11% of sub-regional visitation).[17]
- Bridgetown-Greenbushes[18] receives a fairly even split of visitation between domestic day trippers and domestic overnight visitors at 48% (46k visitors) and 51% (49k visitors) respectively. We consider this is because not only does the LGA have a main highway through the region which generates a day trip market, but also because the LGA, and Bridgetown in particular, is recognised as a business hub, generating a stronger overnight market.
- Nannup's visitor market[19] is split between domestic overnight visitors, comprising 53% of visitors (44k visitors), followed by domestic day trippers (45% or 38k visitors) and international overnight visitors (1% or 1k visitors). We understand that Nannup is estimated to have a stronger overnight than day trip market because it has a number of events which are strongly supported, and, we understand from accommodation providers, that visitors out of preference will stay overnight because of multi-day events. The strength of the day trip market in Nannup is primarily because of day trip excursions which visitors to the Margaret River are undertaking to Nannup since the upgrade[20] of the Mowen Road (now a 50-minute drive).
- Boyup Brook LGA, which falls outside the WBAC region, but within the Blackwood River Valley tourism sub-region is estimated to receive a much smaller share of visitation, comprising 11% of total visitation to the Blackwood River Valley sub-region. We understand this is primarily because of the smaller tourism product base which the LGA has on offer.
- Manjimup, which is the only LGA in the Southern Forests sub-region, is estimated to receive 308k visitors in total, more than half of which, are domestic overnight visitors (58% of visitation or 179k visitors)[21], followed by domestic day trippers (36% of visitors or 111k visitors) and international overnight visitors (6% of visitors or 18k visitors). Manjimup is estimated to have a larger domestic overnight visitor market because it is a major urban centre within the ASW region which also generates a large overnight visitor market associated with business, government and supporting industries.

Total estimated WBAC visitation is 487k, comprising approximately 9.3% of the ASW region's visitation. Based on the limited product in the WBAC region and analysis of visitation to each VC, we consider this visitation estimate to be fairly accurate.

[17] Whilst LGA visitation data was available for Bridgetown-Greenbushes Shire (via TRA Local Government Area Profiles, 2014), data for Nannup and Boyup Brook was unavailable. To fill this gap, The Group applied a variety of assumptions based on discussions with stakeholders, an accommodation audit of room numbers, national parks visitation and occupancy rates and a product audit.
[18] Visitation data to Bridgetown-Greenbushes was available (via TRA Local Government Area Profiles, 2014), however, this excluded domestic day trip visitation. The Group has applied a variety of assumptions based on discussions with stakeholders, national parks visitation, visitation to the VIC data as well as product audit data to estimate domestic day visitation for Bridgetown-Greenbushes Shire.
[19] Based on discussions with stakeholders, an accommodation audit of room numbers and occupancy rates and a product audit.
[20] http://www.donnybrookmail.com.au/story/2147827/margaret-river-nannup-link-set-to-open/
[21] Based on TRA Local Government Area Profiles, 2014 (http://tra.gov.au/Tourism_in_Local_Government_Areas_2016/LGA_Profiles/index.html)

Figure 8: Estimated Visitation to WBAC[22]



[22] Based on TRA Local Government Area Profiles, 2014 (http://tra.gov.au/Tourism_in_Local_Government_Areas_2016/LGA_Profiles/index.html), consultation with stakeholders, national parks visitation and accommodation audits and occupancy assessments.

4. PRODUCT AUDIT

An accommodation, attraction and event audit has been undertaken to assess current tourism product throughout the three LGAs to assist in determining the optimum way to deliver visitor services.

The full findings of the product audit are contained in Section 3 of the Supporting Documentation.

4.1. Accommodation Audit

With numerous small accommodation operators across the three LGAs, such as cottages and B&Bs, which the VCs either currently or have the potential to promote through their websites or booking platforms, an accommodation audit was undertaken. Tables 2 and 3 provide a summary of the commercial accommodation audit for Bridgetown-Greenbushes, Manjimup and Nannup LGAs. It demonstrates the following:

- There are 159 properties across the three LGAs and 1,018 rooms/units available along with 583 caravanning sites.
- Manjimup LGA has the largest number of commercial accommodation properties with 86 properties, and the largest share of available rooms stock (699 rooms or 69% of rooms across the three LGAs).
- The three LGAs are predominantly a cottage/cabin/lodge/guest house/B&B market, with cottages being the most common commercial property type across the three LGAs, accounting for 51 properties (32%), followed by cabin/lodges (26 properties, 16%), guest houses (23 properties, 14%), and B&Bs (16 properties, 10%).
- Although cottages are the most common property type, motels account for the largest room stock with 279 rooms (accounting for 27% of total stock).

Since many of the small accommodation operators do not have their own websites, this provides each of the VCs with a good opportunity to have a booking website/portal. For those VCs that do not currently have the Bookeasy system, it is recommended that training courses be implemented to bridge the knowledge gap.

Table 2: Accommodation Audit Summary by LG[23]

LGA/Type	# of Properties	% of Total properties	# of Total Rooms/Units	% of Total Rooms/Units	# of Total Sites	% of Total Sites	Average Official Rating
Bridgetown-Greenbushes	**39**	**25%**	**190**	**19%**	**80**	**14%**	**3.8**
Guest House	13	8%	27	3%	0	0%	4.0
Cabin/Lodge	7	4%	28	3%	0	0%	4.0
Cottage	6	4%	15	1%	0	0%	-
B&B	6	4%	8	1%	0	0%	3.5
Hotel	3	2%	55	5%	0	0%	-
Caravan Park	2	1%	9	1%	80	14%	-
Motel	2	1%	48	5%	0	0%	3.8
Manjimup	**86**	**54%**	**699**	**69%**	**403**	**69%**	**3.6**
Cottage	21	13%	91	9%	0	0%	3.8
Cabin/Lodge	17	11%	138	14%	0	0%	3.6

[23] The accommodation audit was a desktop research exercise using Hotels.com and Bookings.com, as well as information provided by the LGs, VCs, and their websites (https://www.walpole.com.au/; http://www.bridgetown.com.au/; http://www.everythingnannup.com.au/; http://www.manjimupwa.com/; http://www.pembertonvisitor.com.au/; http://www.northcliffevisitorcentre.com.au/; http://southernforests.com.au/). If operators have not listed themselves on these websites/with the VCs, they may not appear in this list.

LGA/Type	# of Properties	% of Total properties	# of Total Rooms/Units	% of Total Rooms/Units	# of Total Sites	% of Total Sites	Average Official Rating
Caravan Park	10	6%	83	8%	403	69%	-
Guest House	9	6%	13	1%	0	0%	-
Motel	8	5%	231	23%	0	0%	3.3
B&B	6	4%	9	1%	0	0%	-
Backpackers	5	3%	11	1%	0	0%	-
Serviced Apartments	3	2%	13	1%	0	0%	4.0
Hotel	3	2%	70	7%	0	0%	3.3
Houseboat	1	1%	1	0.1%	0	0%	-
Glamping	1	1%	0	0%	0	0%	-
Camping	1	1%	33	3%	0	0%	-
Holiday Home	1	1%	6	1%	0	0%	-
Nannup	**34**	**21%**	**129**	**13%**	**100**	**17%**	**3.7**
Cottage	24	15%	79	8%	0	0%	3.0
B&B	4	3%	11	1%	0	0%	4.3
Cabin/Lodge	2	1%	2	0.2%	0	0%	-
Caravan Park	1	1%	3	0.3%	100	17%	-
Serviced Apartments	1	1%	8	1%	0	0%	3.0
Hotel	1	1%	20	2%	0	0%	-
Guest House	1	1%	6	1%	0	0%	4.0
Total	**159**	**100%**	**1,018**	**100%**	**583**	**100%**	**3.7**

Table 3: Accommodation Audit Summary by Accommodation Type

Type	# of Properties	% of Total Properties	# of Total Rooms/Units	% of Total Rooms/Units	# of Total Sites	% of Total Sites	Average Official Rating
Cottage	51	32%	185	18%	0	0%	3.7
Cabin/Lodge	26	16%	168	17%	0	0%	3.6
Guest House	23	14%	46	5%	0	0%	4.0
B&B	16	10%	28	3%	0	0%	3.9
Caravan Park	13	8%	95	9%	583	100%	-
Motel	10	6%	279	27%	0	0%	3.4
Hotel	7	4%	145	14%	0	0%	3.3
Backpackers	5	3%	11	1%	0	0%	-
Serviced Apartments	4	3%	21	2%	0	0%	3.8
Glamping	1	1%	0	0%	0	0%	-
Camping	1	1%	33	3%	0	0%	-
Holiday Home	1	1%	6	1%	0	0%	-
Houseboat	1	1%	1	0.1%	0	0%	-
Total	**159**	**100%**	**1,018**	**100%**	**583**	**100%**	**3.7**

4.2. Attractions Audit

The attractions audit has identified 120 attractions offered in WBAC. It is important to note that this supply side audit of product captures those operators and attractions who are listed on TripAdvisor and the websites of the VCs[24] or were provided by the VCs. There may be some operators or attractions which either are not listed with VCs or do not have a web presence and are, therefore, not captured in this audit.[25]

Based on this audit, tourism across the three LGAs is primarily distributed amongst:

- nature/recreation, which accounts for 30% of product;
- water activities, which comprise 12% of product; and
- museum/historical, comprising 12% of product.

The vast majority of tourism product is situated in Manjimup, which offers 83 attractions (69% of total tourism product across the three LGAs).

Table 4 provides a breakdown of attraction product for WBAC.

Table 4: Attractions Audit Summary for WBAC

	Bridgetown-Greenbushes		Manjimup		Nannup		Total	
Product Type	Number	% Split	Number	% Split	Number	% Split	Number	% Split
Nature/Recreation	5	4%	29	24%	2	2%	36	30%
Water Activities	0	0%	13	11%	1	1%	14	12%
Museum/Historical	5	4%	9	8%	0	0%	14	12%
Winery/Cidery/Brewery	3	3%	9	8%	1	1%	13	11%
Art/Gallery	3	3%	9	8%	1	1%	13	11%
Farm	2	2%	3	3%	4	3%	9	8%
Specialty Store	3	3%	0	0%	6	5%	9	8%
Golf/Putt Putt	0	0%	3	3%	1	1%	4	3%
Tour	0	0%	2	2%	0	0%	2	2%
Scenic Drive	0	0%	1	1%	0	0%	1	1%
Craft	0	0%	1	1%	0	0%	1	1%
Education	0	0%	1	1%	0	0%	1	1%
Tram	0	0%	1	1%	0	0%	1	1%
Horse Riding	0	0%	1	1%	0	0%	1	1%
Motor Sports	0	0%	1	1%	0	0%	1	1%
Total	**21**	**18%**	**83**	**69%**	**16**	**13%**	**120**	**100%**

[24] Websites used include TripAdvisor, https://www.walpole.com.au/; http://www.bridgetown.com.au/; http://www.everythingnannup.com.au/; http://www.manjimupwa.com/; http://www.pembertonvisitor.com.au/; http://www.northcliffevisitorcentre.com.au/, http://www.golfwa.org.au/cms/services/where-can-i-play/private-clubs/wa-country-club-directory/, http://www.blackwoodvalleywine.asn.au/Blackwood-Valley-Wineries.html, http://southernforests.com.au/. Some attractions were also provided by the VCs and LGs.

[25] Although businesses such as service stations, private transport hire, function centres and clothing stores were included in VC membership lists provided to The Group, these were not included in the attractions audit

4.3. Events Audit

Based on desktop research,[26] the following table provides an audit of the events offered in WBAC. There were 70 events identified across the three LGAs.

The most common event types were sporting/competitions with 24 events (accounting for 34% of total events), followed by festivals (accounting for 30% of events) and music events (accounting for 9% of events).

The day tripper and overnight visitor market to Nannup, in particular, includes many event attendees.

Table 5: Events Audit Summary for WBAC

	Bridgetown-Greenbushes		Manjimup		Nannup		All Shires		Total	
Event Type	Number	% Split	Number	% Split	Number	% Split	Number	% Split	Number	% Split
Sporting/ Competition	8	11%	12	17%	4	6%	0	0%	24	34%
Festival	8	11%	7	10%	3	4%	3	4%	21	30%
Music	2	3%	4	6%	0	0%	0	0%	6	9%
Arts/Cultural	0	0%	2	3%	1	1%	1	1%	4	6%
Food & Beverage	3	4%	0	0%	1	1%	0	0%	4	6%
Markets	0	0%	3	4%	1	1%	0	0%	4	6%
Show	1	1%	1	1%	0	0%	0	0%	2	3%
Fundraiser	0	0%	2	3%	0	0%	0	0%	2	3%
Exhibition	1	1%	0	0%	0	0%	0	0%	1	1%
Walk	1	1%	0	0%	0	0%	0	0%	1	1%
Open Day	1	1%	0	0%	0	0%	0	0%	1	1%
Total	**25**	**36%**	**31**	**44%**	**10**	**14%**	**4**	**6%**	**70**	**100%**

[26] The events audit was a desktop research exercise using: an events calendar provided by WBAC; https://www.walpole.com.au/; http://www.bridgetown.com.au/; http://www.everythingnannup.com.au/; http://www.manjimupwa.com/; http://www.pembertonvisitor.com.au/; http://www.northcliffevisitorcentre.com.au/; http://www.southernforests.com.au/; http://www.southernforests.com.au/; http://www.blackwoodrivervalley.org.au/ and information provided by the VCs and LGs. If events are not listed on these websites/with the VCs/LGs, they may not appear in this list.

5. RESEARCH

5.1. Overview

The following section contains secondary research from TRA's study into WA VCs and tourist behaviour in 2015[27], Haeberlin Consulting's research on the future of WA VCs[28], as well as a study conducted by The Group for the Sunshine Coast Regional Council in 2010 as part of a Visitor Information Centre Review.[29] As no budget was available to conduct similar consumer research regarding visitor services in WBAC specifically, these three pieces of research are viewed as being the most relevant and useful to WBAC regarding visitor information services.

The research conducted by TRA was based on intercept interviews with tourists at selected VCs and major tourism attractions from January-May 2015. The sample included 279 visitor centre users and 350 non-users. Additionally, an online survey was emailed to 876 tourists from visitor centre databases and was completed by 328 visitor centre users.

The research on the future of WA VCs was based on stakeholder consultation involving, online surveys and in-depth interviews with 82 visitor centre managers and owners, in-depth interviews with 53 industry and government stakeholders, written contributions from the Visitor Centre Association of WA and the CRC Association of WA, and online surveys with tourism operators in WA.

The research conducted by The Group was based on an online survey of 500 respondents (visitors who had been to the Sunshine Coast in the previous 12-month period) throughout Australia, with an additional 60 respondents based in New Zealand.

5.2. Key Findings from Tourism Research Australia

The following section provides a summary of the key findings from TRA's research.

- Visitor centre usage is driven by need and not necessarily by visitor type. For example, VCs are more likely to be used if a visitor has not visited the location before (80% of visitor centre users compared to 73% of non-visitor centre users). This is likely to be because they require more information on attractions or accommodation etc. than if they have already visited previously. Other common reasons for using a visitor centre were the inability to access information on the location in advance (64% of visitor centre users, 64% of non-users), and staying at a location for more than one night (54% of users compared to 46% of non-users).
- The main reasons for visiting a visitor centre were sourcing information on attractions in the area (62% of visitor centre users), collecting maps of the area (53%), sourcing information on activities in the area (34%), and asking for directions (25%).[30]
- Non-users do not necessarily reject using VCs, as 95% remarked that they would visit a VC if the situation necessitated them to do so. A further 81% had visited a VC in the past three years.

[27] The Influence of Western Australian Visitor Centres on Tourist Behaviour, Summary, September 2015, Tourism Research Australia
[28] The Future of Visitor Centres in WA, 2014, Haeberlin Consulting
[29] The full findings can be found in Supporting Documentation 2
[30] Note: totals do not add up to 100% as the question is multi-part.

- VCs have a positive impact on visitors' trips, with 95% of users reporting that they are important for their overall visitor experience. Most visitors also reported that they were aware of more attractions and activities because they stopped at VCs (87%), while 70% organised to participate in an activity during their time at the VC.
- Stops at VCs are more likely to be pre-planned rather than spontaneous, with 75% of VC users in the South West Region pre-planning their stop.
- Visitors who used VCs in the South West Region had a high satisfaction rating, with 95% satisfied with their experience of the VC, which included 73% who were very satisfied.

5.3. Key Findings from "The Future of Visitor Centres in WA"

The following section provides a summary of the key findings from "The Future of Visitor Centres in WA."

- The main features that visitors like to see offered by a visitor centre are: knowledgeable, professional staff, with high-level customer services skills; unbiased and authoritative information; and regional displays and stories. Other important features include the ability to book tours and accommodation.
- The focus of VCs is varied. All VCs interviewed provide visitor information, while almost half offered bookings. Other focuses include community, basic destination marketing, advanced destination marketing and industry linkage.
- Visitor centre stakeholders were varied in their view on the importance of VCs and their current performance, with concerns over a decline in visitor numbers and that an increase in internet bookings and research would eventually make them irrelevant.
- Although only 10% of domestic visitors stop at a VC, those who do visit stay in the area twice as long.
- There is no standard measure for measuring the performance of VCs.
- There is little evidence to suggest that VCs operate as a single network, but rather they operate as a collection of independent centres.
- The accreditation model is too focused on compliance when the focus should be on providing a consistent high-quality visitor experience.
- Branding for VCs is inconsistent, particularly the accredited yellow italicised "i" brand. Presentation and layout of the VCs is also inconsistent.
- The challenge of financial stability will continue to affect VCs in the future with reports of decreases in online bookings through VCs by up to 50% from peak levels. There are also issues with being able to recruit and retain highly skilled staff due to funding pressures.
- Being located on a main street or highway is important for increasing overall visitation. Based on anecdotal feedback, VCs which have moved from a quiet street to a main street position have almost doubled their immediate visitation.
- The quality and sophistication of the online presence of VCs is varied. It is important to have a high-quality digital presence as 89% of domestic visitors used the internet to research their trip to WA in 2013, which was an increase of 25% since 2009.[31]

[31] International and National Visitor Surveys, YE June 2013, Tourism Research Australia

5.4. Key Findings from Sunshine Coast Region Study

The following section provides a summary of findings from the survey which highlights future trends for visitor information services:

- The top three types of information sought prior to visiting a destination (gathered from websites or phone calls) include (ranked in order): accommodation information; attraction information; and information on "things to do."
- Regarding sources which were accessed to gain information, the top three sources included (ranked in order): general websites; destination specific websites; and state tourism websites. Other information sources included word of mouth recommendations, brochures, and phone calls made directly to VCs. The popularity of websites for data gathering indicates the importance of having a strong, relevant and updated tourist information website.
- The five main forms of information gathered over the phone or via the internet from a VC prior to visiting included (ranked in order): maps, directions, brochure information, general advice, and event and festival information.
- During visitors' stay in a region, the main sources of information utilised include (ranked in order): brochures; word of mouth; and VC websites. As visitors choose to visit VC websites during their visit, this indicates the importance and need to maintain an updated online presence. With the growing popularity of the internet, this trend is expected to continue in the future.
- Websites, brochures, guidebooks, and word-of-mouth are regarded as the most useful sources of tourist information.
- When respondents were asked if they would use VCs in the future to obtain information, 25% indicate that they would definitely use them. With the growth in online bookings, services and advertising, it is likely that these media will affect a visitor's likelihood of visiting a VC. This is supported by the finding that over 20% indicated that they would not visit a VC in the future because they could find all the information required for their trip over the internet. Again, this highlights the importance to establish an updated and reliable presence for visitor information.
- Respondents indicated that the top two reasons as to why they would consider visiting a VC included to gather information on local events and activities and to obtain local knowledge. The ability to obtain a local's perspective is a unique feature that VCs can offer which the internet often lacks.
- To encourage visitation to VCs in the future, it was found that visitors want to be able to obtain discounts and promotions, have an ability to access internet facilities and be provided with restaurant guides.

5.5. Comparative VC Examples

National and international comparative information was collected and analysed to determine best practice global trends for VCs. This included identifying global best practices that are currently being applied to the provision of information services and specifically to VCs. This research was largely web-based, with follow-up information obtained by email and phone interviews (if required).

The main findings included:

- There are a variety of structures operating, with differing staffing, volunteer structures, financial and other elements but not one uniform approach.
- There is little evidence to suggest that any of the VC systems provide a profitable operation or even achieve a true break-even position (except Blue Mountains VC in NSW and possibly in Auckland and operated by the regional tourism body, Auckland Tourism). Both of these get exceptionally high numbers of international visitors purchasing souvenirs and merchandise.
- The Viennese United Nations Visitors' Centre, while not only a visitor centre provides an interesting example of the use of other commercial revenue streams supporting the centre, operating a florist, hairdresser and café. While there might be some

controversy with this option, The Group merely provides it as an example of a multipurpose centre which operates close to breakeven but in direct competition with commercial businesses offering similar or the same services.

- The most commercially focused VCs seem to clearly separate the volunteer and staff functions and roles and, in some cases, the location of where they operate from.
- There are numerous examples of VCs which operate with "satellite" centres around central VCs. These satellite centres are in the form of small kiosks or roaming "ambassadors" which are often volunteers in city-based locations.
- Many centres offer multi-lingual support services as well as tours.

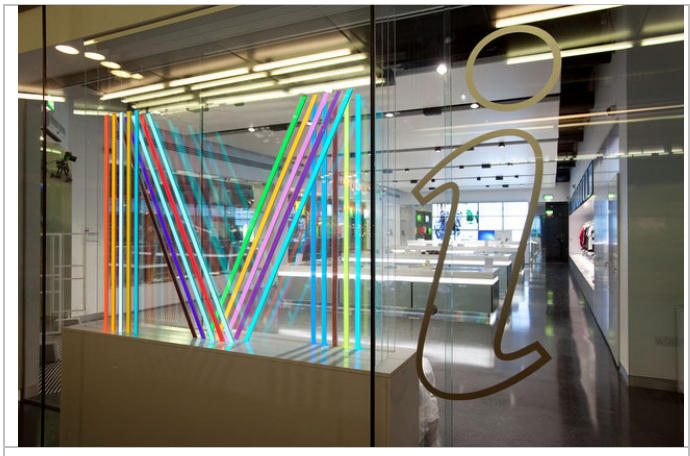
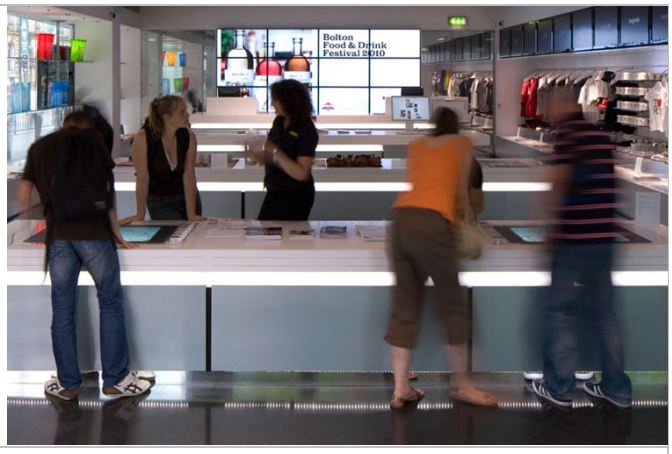
What is evident is the move to more digital and interactive solutions, such as touch screens etc. rather than traditional manned facilities. Most LGs which run VCs are trying to find ways of making them cost neutral as the operating costs generally continue to rise, whilst revenue remains static or drops.

5.6. Global Best Practice Elements

Of the VCs analysed, there were several factors which distinguished what a successful or global best practice visitor information model may need to include:

- A high-profile location to capture consumer and visitor interest, such as along a major road or intersection.
- Multipurpose centres where providing visitor information is only one of many functions.
- A booking centre for events, shows, attractions, and, to a lesser extent, accommodation.
- State-of-the-art technology screens and displays etc., to replace traditional brochure racks and print material.
- Highly trained roving ambassadors (usually volunteers), who are allocated areas to patrol and assist visitors. They may also offer tours.
- Highly trained staff with little expectation of cost recovery from visitor information services.
- A variety of income streams but tending to include internet cafés or general food and beverage facilities as mechanisms for trying to offset overhead costs, particularly staffing costs.
- Continued expansion of web-based services, especially for bookings and general information.

Figure 9: Best Practice Information Centre Examples

	
Manchester VC, UK	Manchester VC, UK

Copenhagen Touch Wall, Denmark

Copenhagen Touch Wall, Denmark

Visit Dublin Centre

New Plymouth i-Site, NZ

Melbourne Museum Information Touch Screens, Australia

MCA Information Touch Screens, Australia

5.7. Management and Operation of VCs

Increasingly, with changes in consumer preference and desires, best practice visitor services involve the effective utilisation of a range of technologies to provide information to visitors on demand. While not suggesting that there is a one size fits all model for effective VC operation, VC services need to be tailored to the needs of the retailers and the local tourism industry and the demands of consumers.

The vexed question which WBAC needs to consider is whether it is still cost effective to continue to invest the same level in VCs and/or whether a different mix of visitor services is now something to be considered to better meet consumer and industry needs.

6. THE VISITOR CENTRES

The following subsections include an analysis of the existing VCs in WBAC. This includes an overview of visitor penetration to the VCs, management structure and digital presence associated with each VC.

6.1. Bridgetown-Greenbushes VC

6.1.1. Overview

Table 6: Snapshot of Bridgetown-Greenbushes VC[32]

About	Description
LGA	Bridgetown-Greenbushes Shire
Location	154 Hampton Street, Bridgetown, 6255
Operating Hours	Weekday: 9am-5pm, Weekend: 10am-3pm (Sat), 10am-1pm (Sun & Public Holidays)
Operating Structure	Owned and managed by the Shire of Bridgetown-Greenbushes
Co-located or Standalone	154 Hampton Street, Bridgetown, 6255
Website	http://www.bridgetown.com.au/
Visitation (2016 FY)	25,558
Staff	1 manager (1 FTE), part-time (0.6 FTE), casuals (3 hours per week) and 10 volunteers
Accredited	Yes[33]
Members	64

The Bridgetown-Greenbushes Visitor Centre is located on Hampton St, Bridgetown, which is Bridgetown's main thoroughfare. The VC, which is a yellow 'i' accredited VC, provides accommodation and tour bookings via a Bookeasy website/booking system. It is open 363 days of the year with the exception of Christmas Day and Good Friday.

[32] All visitor, membership and employment data sourced from discussions with each LG and/or VC management.
[33] Value of Visitor Centres, Tourism Council WA, http://corporate.margaretriver.com/wp-content/uploads/2015/09/TCWA0173-Value-of-Visitor-Centres.pdf

The VC is co-located with the Brierley Jigsaw Gallery and whilst the Gallery has a unique range of jigsaw collections, the experience is somewhat dated and could benefit from the introduction of interactive elements etc. and a refresh of displays.

6.1.2. Operating Structure and Staffing

The Bridgetown-Greenbushes VC is owned and run by Bridgetown-Greenbushes LGA and it is the only VC in the WBAC region which is owned/managed by its associated LG.

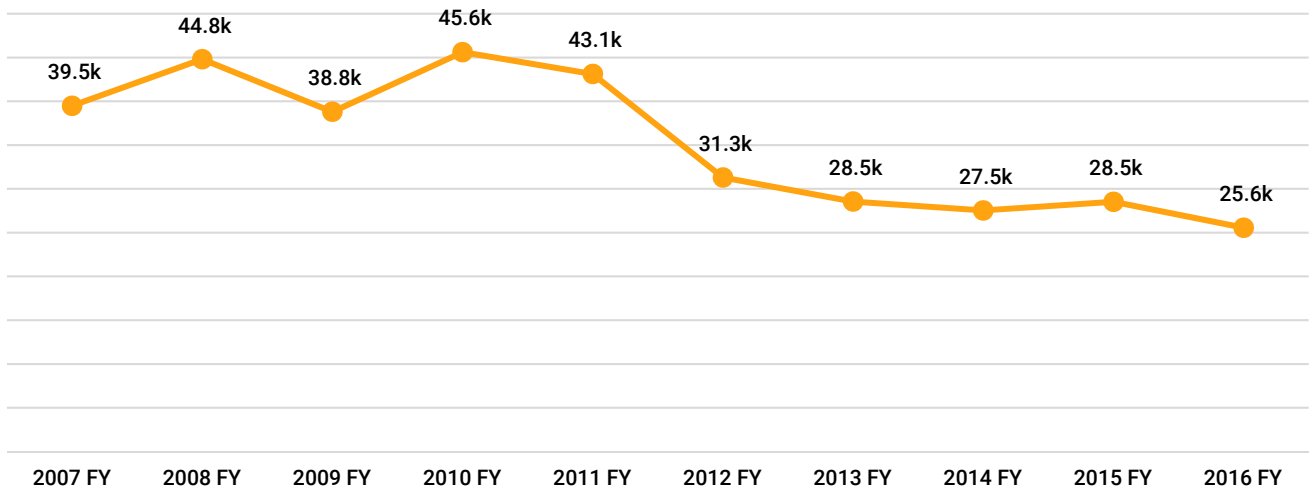
The Bridgetown-Greenbushes VC is staffed by Shire of Bridgetown-Greenbushes employees (1.6 FTE, which includes a manager) in addition casual staff (approximately 3 hours per week) as well as 10 volunteers when required.[34] We understand that the LGA has an above-average retiree population[35] so there is the capacity to potentially encourage more volunteers if required.

6.1.3. Visitor Numbers

The following figure provides a summary of visitation to the Bridgetown-Greenbushes VC over the past 10 years. Over this period, visitation to the VC has declined, on average, by just over 1.5k visitors per annum (equivalent to a -4% annual decline). The VC's peak visitation was in the 2010 FY, where visitation reached 45.6k visitors. Since this period, visitation has declined by over 20k visitors.

We understand[36] that prior to 2011, the VC used to function as a ticket and merchandise venue for the Blues at Bridgetown which resulted in strong visitation and provided a good source of income for the VC. However, from 2011 on, the Blues at Bridgetown organisers elected to perform this function themselves.[37]

Figure 10: Bridgetown-Greenbushes VC Visitor Numbers[38]

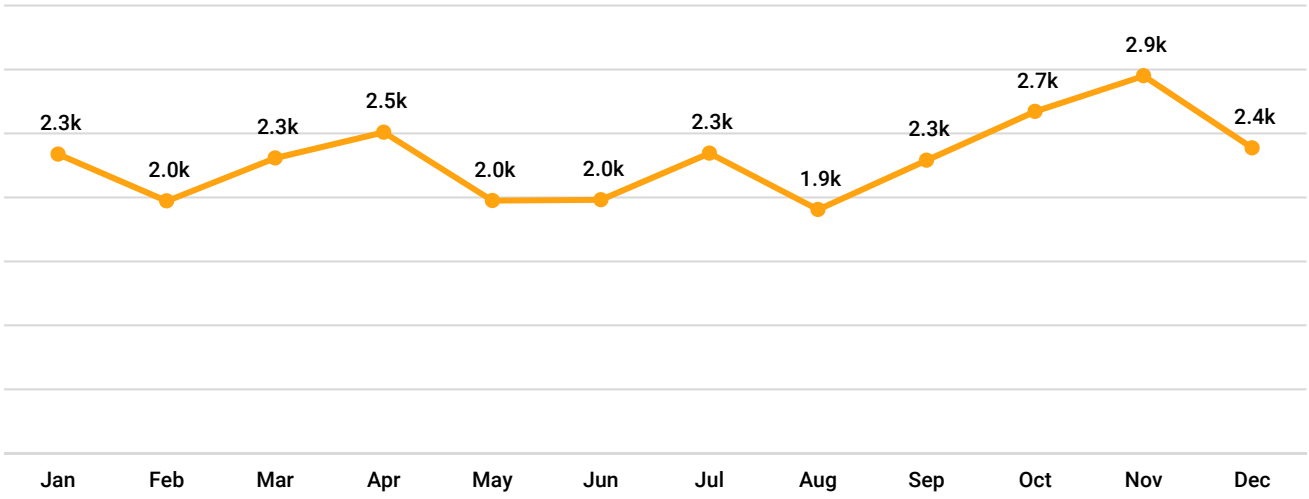


[34] Based on feedback from the Shire of Bridgetown-Greenbushes.
[35] Above 4%
[36] Based on feedback from Bridgetown-Greenbushes VC
[37] 2011 received strong visitor numbers simply because people were coming into the VC assuming it was still the ticket and merchandise venue for the festival.
[38] Provided by Bridgetown-Greenbushes VC. It is important to note that some VCs provided The Group with visitor data per calendar year whilst others provided financial year data (June YE). In order to allow for analysis and comparison of data across each VC, The Group has converted (where possible) all calendar year data to financial year.

Figure 11 below provides a summary of monthly visitation to the VC, averaged over the last five years.[39] This demonstrates that Bridgetown-Greenbushes VC receives the majority of its visitors during school holiday periods as well as during November when the Blues at Bridgetown festival is held.

As the Festival attracts over 15k people[40], visitation into the VC in November should be far higher if visitors see a need for a VC.

Figure 11: Bridgetown-Greenbushes VC Peak Months of Visitation (5-Year Average to 2016 FY)[41]



6.1.4. Membership

As of the 2016 FY, Bridgetown-Greenbushes VC has 64 members, 13% of which (8 members) are situated out of the Bridgetown-Greenbushes LGA in areas such as Nannup and Manjimup and 8% (5 members) of which are associative members such as events and other associations.[42]

Until a comprehensive breakdown of tourism product throughout the Bridgetown-Greenbushes LGA is available (including those who are not currently listed online), it is not possible (with sufficient accuracy) to demonstrate the percentage of tourism businesses in Bridgetown-Greenbushes which the VC captures as members. Anecdotal feedback from the Shire of Bridgetown-Greenbushes, however, indicates that local industry operator numbers have gradually been dropping away as members of the VC. The value of the VC to industry members would, therefore, appear not to be as strong as it used to be; this places greater pressure on the VC to illustrate it is delivering sufficient value to consumers, to warrant the ongoing investment being made by the Shire of Bridgetown-Greenbushes.

Furthermore, membership is noted as including not only locally based tourism industry businesses, but others from outside of the LGA, and more general retail businesses within the LGA, so any analysis of the potential market for members to the VC would need to factor in these other businesses.

[39] Visitation has only been averaged across five years, rather 10 years, as, prior to 2011, the VC acted as a ticket and merchandise seller for the Blues at Bridgetown festival. The VC therefore received significant spikes in visitation in November because of this. Because the VC no longer performs this function, The Group has only averaged visitation for the years following this to demonstrate a more accurate picture of average visitation to the VC in November.
[40] https://au.news.yahoo.com/thewest/regional/south-west/a/25445390/blues-a-boon-for-bridgetown/
[41] Provided by Bridgetown-Greenbushes VC
[42] Data provided by the Shire of Bridgetown-Greenbushes

6.1.5. Financial Performance

Table 7 provides a summary of Bridgetown-Greenbushes VCs' financial performance over the past two years. It demonstrates the following:

- That not only has gross profit declined (by 3%), but operating expenses for the VC have risen by 3%.
- The VC produced a net loss of just under -$227k (a 31% increase in the net loss from the previous year).
- For every visitor that enters the VC, $3.34 is generated in revenue and $10.49 in expenses.
- In total, the VC produces a net loss of -$8.86 for every visitor into the VC.
- Major income streams for the VC comprise accommodation commissions (generating 38% of income in 2015/16), followed by VC memberships (22% of income).
- A decline in accommodation commission revenue occurred over the 2015 FY to 2016 FY, falling by 14% (or just over $5k) which could be indicative of the growing use of the internet for visitors to complete accommodation bookings.
- Primary cost centres for the VC are payroll expenses[43] (comprising 42% of all expenditure in 2015/16), followed by internal activity based costings (11% of expenditure). It is important to note that no lease fee appears to be charged to the VC[44] by the Shire of Bridgetown-Greenbushes.

We note that these results are in line with most other local government operated VCs we have reviewed nationwide.

Table 7: Bridgetown-Greenbushes VC Financial Performance[45]

	2014/15	2015/16	Change	p/Visitor (2015/16)
Gross Profit[46]	$88,109	$85,414	-$2,695	$3.34
Operating Expenses	$260,140	$268,171	$8,031	$10.49
Net Profit/Loss	**-$173,402**	**-$226,553**	**$53,151**	**-$8.86**

6.1.6. Digital Presence

Table 8: Bridgetown-Greenbushes VC Digital Presence Summary

Digital Media	Y/N	Comment
Website	✓	The design is dated. However, we understand the Shire of Bridgetown-Greenbushes is currently reviewing the website and potential upgrades to its functionality.
Online booking capability	✓	Booking system design and process is dated. The Shire of Bridgetown-Greenbushes is currently reviewing upgrading this.
Optimised for mobile access	✗	No
Social media presence	✗	No

[43] Including the line items of: salaries, superannuation, workers compensation insurance, training and other employee costs.
[44] Based on the P&L provided by the Shire of Bridgetown-Greenbushes
[45] Financials provided by the Shire of Bridgetown-Greenbushes
[46] Bridgetown-Greenbushes VC includes its COGS in its expenditure line items which is why total income and gross profit has not been included separately as it has for Manjimup and Walpole VCs by way of example.

6.2. Manjimup VC

6.2.1. Overview

Table 9: Snapshot of Manjimup VC[47]

About	Description
LGA	Manjimup Shire
Location	Johnson Crescent (off Giblett Street), Manjimup, WA 6258
Operating Hours	Weekday: 10am-4pm, Weekend: 10am - 4pm
Operating Structure	Independent not-for-profit run business
Co-located or Standalone	Standalone
Website	http://www.manjimupwa.com/index.htm
Visitation (2016 FY)	47,491
Staff	1 full-time manager, 3 casuals (1/4 FTE), 8 volunteers
Accredited	No[48]
Members	80 - 100

Manjimup VC is located next to the town centre of Manjimup in the Coronation Park Precinct. The VC is open 6 days per week (Monday – Saturday) and is the only unaccredited VC in Manjimup LGA. Currently, the VC does not take bookings.

Visitors to the VC are often enquiring about the surrounding forest areas, particularly including the climbing trees as well as questions regarding the timber industry in the LGA.

6.2.2. Operating Structure and Staffing

Manjimup VC is an independent, not-for-profit run business. The VC, whilst not being owned or managed by the Shire of Manjimup, receives a fee for service from the Shire of Manjimup as well as receiving a peppercorn lease on the VC building.

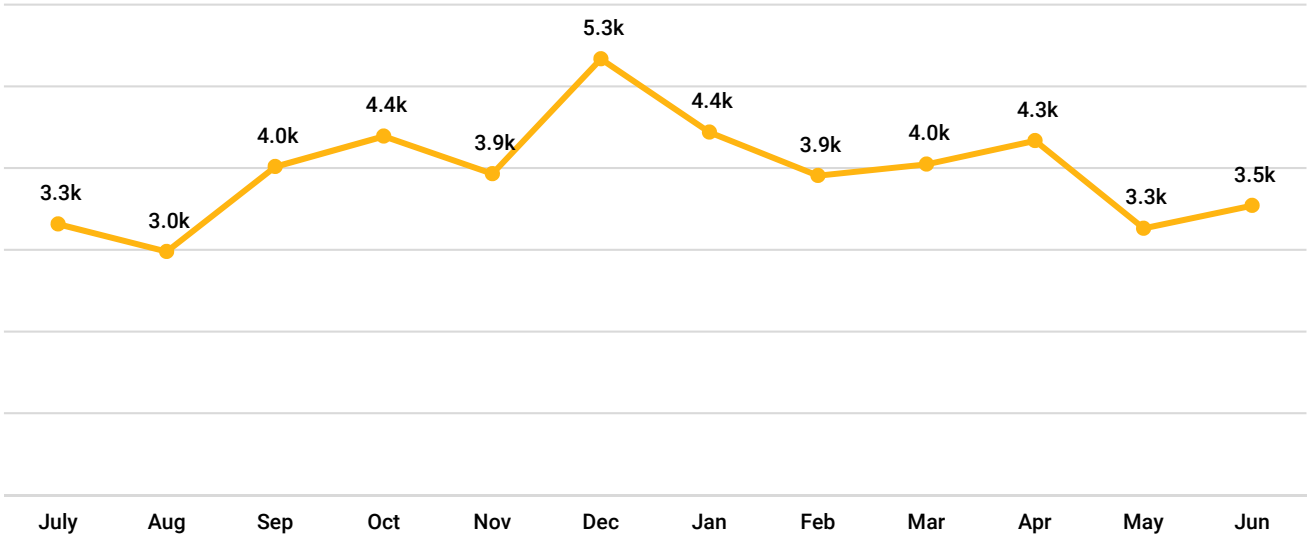
The VC is operated with 1 manager (1 FTE), 3 casuals when required (1/4 FTE) as well as 8 volunteers.

[47] All visitor, membership and employment data sourced from discussions with LG and/or VC management.
[48] Value of Visitor Centres, Tourism Council WA, http://corporate.margaretriver.com/wp-content/uploads/2015/09/TCWA0173-Value-of-Visitor-Centres.pdf

6.2.3. Visitor Numbers

The Manjimup VC receives approximately 47k walk in visitors per annum. In the 2016 FY, the VC received its highest level of visitation in December (5.3k visitors), followed by January (4.4k visitors). No other visitor data (including visitation in previous years) was provided to The Group to analyse trends into the VC.

Figure 12: Manjimup VC Visitor Numbers (2016 FY)[49]



6.2.4. Membership

Manjimup VC has an estimated 80 – 100 members[50] with the majority of these members being businesses which are not directly related to the tourism sector, such as building companies, but who want to support their town and tourism.

Until a comprehensive breakdown of tourism product throughout Manjimup LGA is available (including those who are not currently listed online), as well as a breakdown of the VC's membership (local businesses compared with those who are based out of the LGA), it is not possible to demonstrate the percentage of tourism businesses in Manjimup which the VC captures as members.

We understand that over the last few years, the VC has experienced a decline in membership driven primarily by a resistance to paying membership fees to multiple different associations.

6.2.5. Financial Performance

Table 10 provides a summary of Manjimup VC's financial performance in 2015/16. It demonstrates the following:

- Revenue generated totalled just over $113k, with the primary sources of income being sales of goods ($39k and comprising 34% of total income), followed by the fee for service received from Manjimup Shire ($34k and comprising 30% of total income).
- Gross profit (revenue less COGS) was just over $91k.
- Operating expenses totalled just under $76k, with wages comprising 80% ($61k) of all expenditure. It is important to note that no lease fee is charged to the VC by the Shire of Manjimup.

[49] Provided by Manjimup VC
[50] Based on discussions with Manjimup VC management

- The VC generates $1.92 in gross profit per visitor into the VC, $1.60 in expenditure and a net profit of $0.32.

Table 10: Manjimup VC Financial Performance[51]

	2015/16	p/Visitor (2015/16)
Total Revenue	$113,158	$2.38
COGS	$21,873	-
Gross Profit	$91,285	$1.92
Operating Expenses	$75,934	$1.60
Net Profit/Loss	**$15,351**	$0.32

6.2.6. Digital Presence

Table 11: Manjimup VC Digital Presence Summary

Digital Media	Y/N	Comment
Website	✓	The design is dated and there is limited functionality available.
Online booking capability	✗	-
Optimised for mobile access	✗	-
Social media presence	✗	-

[51] Provided by Manjimup VC. Please note, only 1 year of data was provided.

6.3. Nannup VC

6.3.1. Overview

Table 12: Snapshot of Nannup VC[52]

About	Description
LGA	Nannup Shire
Location	16 Warren Rd, Nannup WA 6275
Operating Hours	7 days (9am – 5pm)
Operating Structure	Contracted by the Shire of Nannup to a third party (A Taste of Nannup)
Co-located or Standalone	Co-located with A Taste of Nannup (no dedicated staff for the VC)
Website	http://www.atasteofnannup.com.au/ and http://www.everythingnannup.com.au
Visitation (estimate 2016)	6,212
Staff	3 staff and 1 volunteer
Accredited	No[53], but working towards it.
Members	n/a

The Nannup VC is located on Warren Road, the main road in Nannup. It is the only VC within the WBAC region which is co-located with a private commercial business - a local produce/gift shop, "A Taste of Nannup." A Taste of Nannup won the contract from the Shire of Nannup to operate the VC after the previous VC at the Nannup Community Centre was shut down.

The VC is open 7 days per week and whilst the VC is not currently accredited, the operators are currently working towards achieving this accreditation.

It is important to note that because the VC is now operated by a commercial provider, the VC is unable to directly access government funding. To source any funding, it must apply through the Shire of Nannup.

[52] All visitor, membership and employment data sourced from discussions with LG and/or VC management.
[53] Value of Visitor Centres, Tourism Council WA, http://corporate.margaretriver.com/wp-content/uploads/2015/09/TCWA0173-Value-of-Visitor-Centres.pdf

6.3.2. Operating Structure and Staffing

The Nannup VC is managed by A Taste of Nannup on behalf of the Shire of Nannup. A Taste of Nannup was awarded the contract to manage the VC after winning an Expressions of Interest process. In exchange for operating the VC, A Taste of Nannup receive $10k from the Shire of Nannup to support the service.[54]

The VC does not have any dedicated staff for providing visitor information, rather, Taste of Nannup staff provide visitor information where required.

6.3.3. Visitor Numbers

Ascertaining visitation into the Nannup VC was challenging because the VC is co-located with a commercial business and there is a need to determine a split between those entering purely for visitor information from those who are looking to purchase items.

Based on discussions with the managers of A Taste of Nannup, it was agreed that on any given day, approximately 15 – 20 people enter the store with specific enquiries that relate to VC functions, such as directions, asking for maps etc. Based on this assumption, the VC is estimated to receive 6,212 true visitors per annum.

Additionally, we understand that the two major events for Nannup (Nannup Music Festival and Nannup Flower and Garden Festival) both attract approximately 8k – 10k[55] into the Shire of Nannup and which increases visitation to the VC. The exact quantum of this, however, is not currently understood.

6.3.4. Membership

We understand that Nannup VC does not currently have a membership base. Some operators in Nannup are also members of other tourism associations such as Bridgetown-Greenbushes' association (3 in total).

We do understand that Nannup has a particularly active arts group under the Nannup Arts Council which currently has approximately 40 members.

6.3.5. Financial Performance

No assessment of the financial performance of Nannup VC is able to be undertaken because, as outlined previously, the VC is operated by a commercial business on behalf of the Shire of Nannup. In exchange for this, the commercial business receives $10k from the Shire of Nannup.

6.3.6. Digital Presence

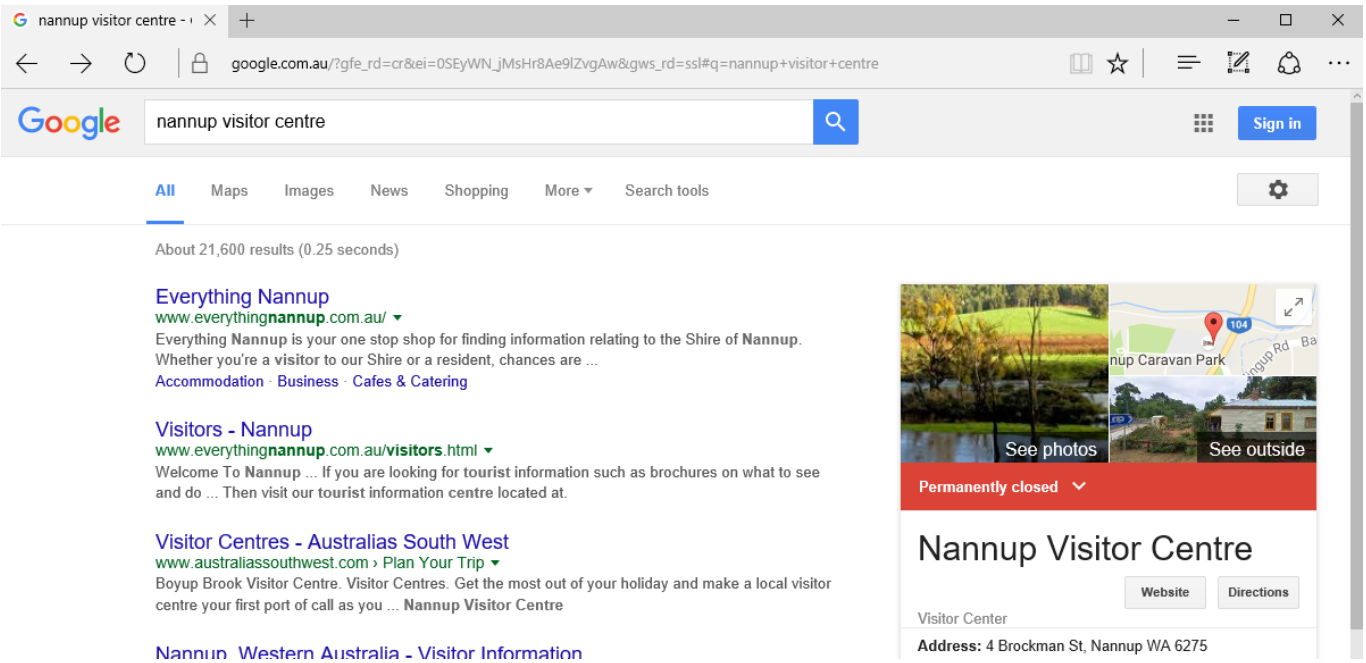
Table 13: Nannup VC Digital Presence Summary

Digital Media	Y/N	Comment
Website	✓	Two websites: http://www.everythingnannup.com.au/ and http://www.atasteofnannup.com.au/ The design of both sites is dated and functionality is limited.
Online booking capability	✗	-
Optimised for mobile access	✗	-
Social media presence	✗	-[56]

[54] Though we note, per: http://www.nannup.wa.gov.au/newsletters/details.aspx?newsletterid=16 that the funding is only available for the first year of operation.
[55] Based on WBAC feedback
[56] We understand that Nannup VC do have a social media presence, however, The Group was unable to locate direct links for these. Links were requested by The Group to WBAC, however, these were unable to be provided.

There is also a need for the current operators of the VC to update the Google listing for the VC as currently, when a search query for “Nannup Visitor Centre” is performed, it displays that the VC is “permanently closed” (see Figure 13).

Figure 13: Google Listing for Nannup VC



6.4. Northcliffe VC

6.4.1. Overview

Table 14: Snapshot of Northcliffe VC[57]

About	Description
LGA	Manjimup Shire
Location	Muirillup Road, Northcliffe WA
Operating Hours	Weekday: 9am-4pm, Weekend: 9am - 4pm
Operating Structure	Independent not-for-profit run business
Co-location	Co-located with Northcliffe Community Resource Centre and Northcliffe Library
Website	http://www.northcliffevisitorcentre.com.au/
Visitation (2015 FY)	33,398
Staff	1 manager (0.6 FTE), 1 part time (0.75 FTE), 2 x casuals (when required), no volunteers for VC (but 150 involved in Karri Cup Challenge)
Accredited	Yes[58]
Members	20

The Northcliffe VC is located on Muirillup Road. Whilst the VC is physically co-located with the Northcliffe Community Resource Centre, Art Gallery as well as the Northcliffe Library, they are not managed as a co-located entity. The VC is a fully accredited VC and is open 362 days per year, with the exception of Christmas Day, Boxing Day and Good Friday).

The VC offers accommodation and tour bookings via a Bookeasy website/booking system.

6.4.2. Operating Structure and Staffing

Northcliffe VC is one of two VCs (Pemberton VC being the other) which is run by a recently amalgamated Pemberton-Northcliffe not-for-profit community organisation. As part of this amalgamated operation, the two VCs share a manager as well as a membership base. This has allowed the VCs to reduce the duplication of functions which previously occurred such as accounting, website management and managerial functions.

[57] All visitor, membership and employment data sourced from discussions with LG and/or VC management.
[58] Value of Visitor Centres, Tourism Council WA, http://corporate.margaretriver.com/wp-content/uploads/2015/09/TCWA0173-Value-of-Visitor-Centres.pdf

Whilst being independent of the Shire of Manjimup, the VC receives a fee for service from the Shire of Manjimup as well as a peppercorn lease for the building they are situated within.

Currently, the manager of the two centres spends approximately three days per week at Northcliffe (0.6 FTE). In addition, the VC has 1 part-time staff member (0.75 FTE) and 2 casuals (on an as needs basis). Whilst volunteers do not assist in the VC specifically, they do have board volunteers (20 hours per month per volunteer) and event volunteers (150 in total) who assist with the annual Karri Cup Challenge mountain bike race.

6.4.3. Visitor Numbers

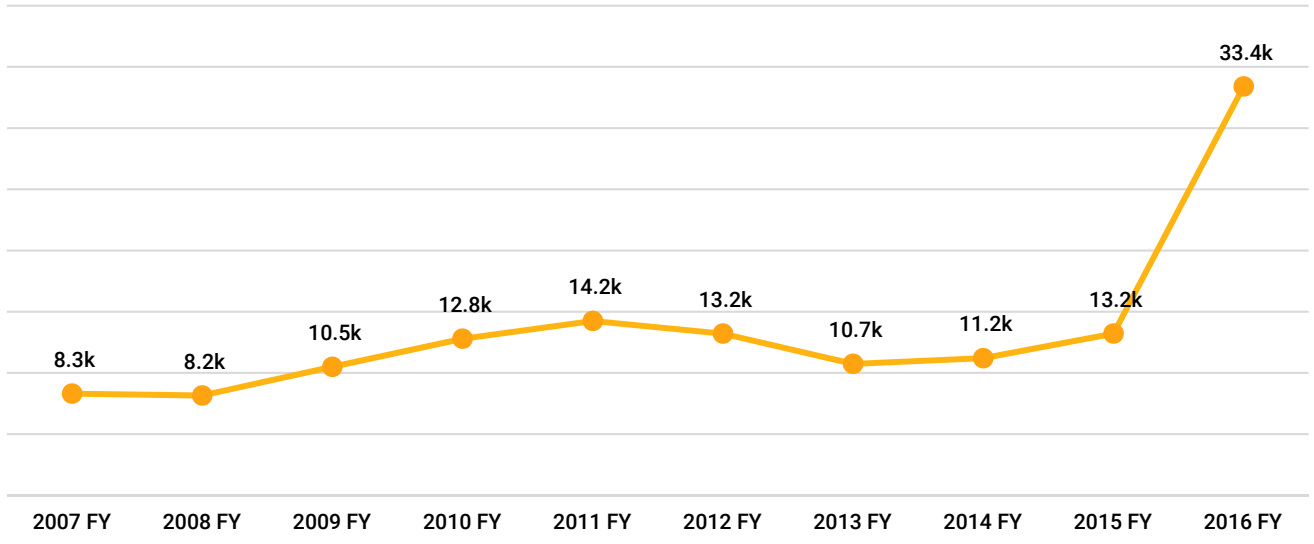
The following figure provides a summary of visitation to Northcliffe VC over the last 10 years. Whilst the data shows a significant increase in visitation from 2015 to 2016, it is important to note the following:

- Prior to 2016, staff were keeping a manual count of visitation into the VC. In 2016, a door counter was installed to keep a record of visitation.
- The VC formed closer ties with other VCs in the South West. In addition, famils were held to educate other staff about what is available within the area.
- The VC developed a far stronger social media presence with a strong focus on the niche wildflower market and Northcliffe's species.

Because of these changes, care is needed when providing a trend analysis of visitation into the Northcliffe VC.

In the 2016 FY, however, the VC received an estimated 33.4k visitors into the VC building (which includes visitors to the sculpture walk and gallery). We understand that in addition to foot traffic, the VC adds into its daily visitor counts an additional 10 "visitors" to account for email and phone enquiries the VC receives, which adds up to approximately 3.6k visitors per annum which are recorded as having entered the VC. The Group considers that going forward, a separate log should be kept of phone calls and emails received as this is a more accurate way of presenting enquiries received.

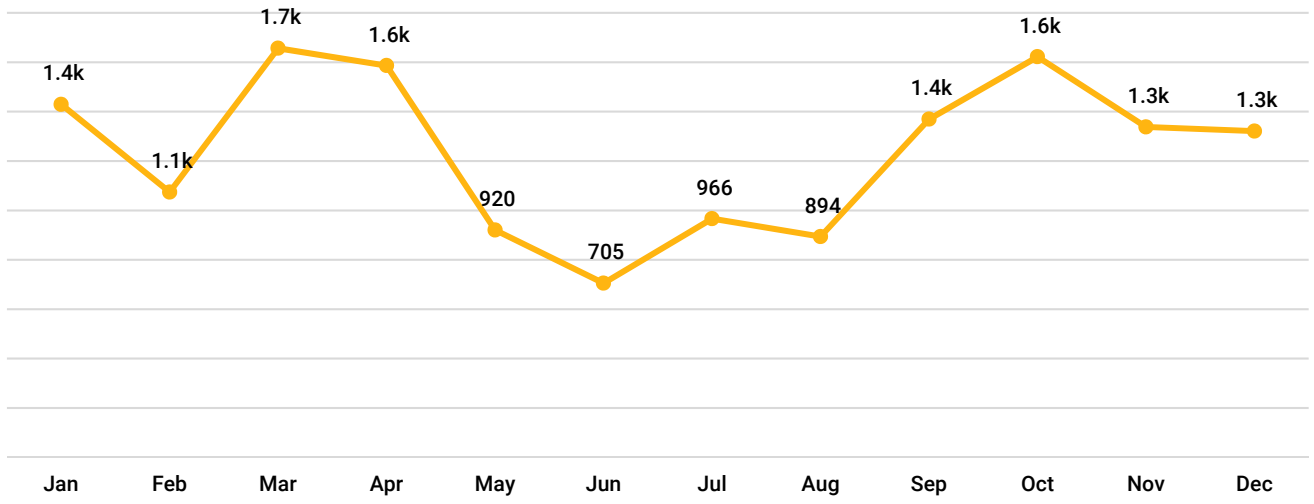
Figure 14: Northcliffe VC Visitor Numbers[59]



[59] Provided by Northcliffe VC. It is important to note that some VCs provided The Group with visitor data per calendar year whilst others provided financial year data (June YE). In order to allow for analysis and comparison of data across each VC, The Group has converted (where possible) all calendar year data to financial year.

Figure 15 provides a summary of average visitation to the VC over the period 2005 – 2015. This demonstrates that the VC has historically received during school holiday periods (December – January, April and October), whilst the winter months (May – August) tend to be far quieter. We understand March was also a strong month for visitation because of the Karri Cup mountain biking event (which attracts roughly 550 riders and a total of approximately 1,500 including support crew etc.[60]), though, they have had to move the event from this date[61] because of safety concerns regarding bushfires.

Figure 15: Northcliffe VC Peak Months of Visitation[62]



6.4.4. Membership

Northcliffe VC has a small membership base of 20 – 12 of these members are tourism businesses and the remaining 8 are classified as private members. Historically, the VC has had up to 20 private members, but, with the initial proposed merger of the Pemberton-Northcliffe membership structure, there has been some drop-off.[63]

Until a comprehensive breakdown of tourism product throughout Manjimup LGA and Northcliffe specifically is available (including those who are not currently listed online), as well as a breakdown of the VC's membership (local businesses compared with those who are based out of the LGA), it is not possible to demonstrate the percentage of tourism businesses in Manjimup LGA and Northcliffe specifically which the VC captures as members.

We understand that the initial desire was to amalgamate Pemberton-Northcliffe VCs with the intention of merging their membership databases. More recently, we have been informed that the discussions for this have been put on hold.

[60] http://www.abc.net.au/local/photos/2015/02/16/4180915.htm
[61] Event operators are looking to move the event to June (http://www.abc.net.au/local/photos/2015/02/16/4180915.htm).
[62] Based on data from 2005 – 2015 provided by Northcliffe VC
[63] Based on feedback from Northcliffe VC management.

6.4.5. Financial Performance

Table 15 provides a summary of Northcliffe VCs' financial performance[64] over the past two years. It demonstrates the following:

- That gross profit has increased by 28% ($24k) over the two-year period assessed.
- The VC produced a net profit of just over $17.6k, an improvement on the net loss generated in the previous year of -$2k.
- For every visitor that enters the VC, $3.33 is generated in gross profit and $2.82 in expenses.
- In total, the VC produced a net profit of $0.53 for every visitor into the VC in 2016.
- Major revenue streams for the VC comprise grants which made up 54% ($79k) of all revenue in the 2016 FY, followed by merchandise sales ($22k and comprising 15% of all revenue).
- The primary cost centre for the VC is wages which comprised 70% ($65k) of all expenditure in the 2016 FY. It is important to note that no lease fee is charged to the VC by the Shire of Manjimup.

Table 15: Northcliffe VC Financial Performance

	2014/15	2015/16	Change	p/Visitor (2015/16)
Total Revenue	$112,411	$145,384	$32,973	$4.35
Gross Profit	$86,869	$111,057	$24,188	$3.33
COGS	$25,542	$34,327	$8,785	-
Other Income	$539	$602	$63	$0.02
Operating Expenses	$89,469	$94,043	$4,574	$2.82
Net Profit/Loss	-$2,061	$17,616	$19,677	$0.53

6.4.6. Digital Presence

Table 16: Northcliffe VC Digital Presence Summary

Digital Media	Y/N	Comment
Website	✓	The design is dated and functionality is limited.
Online booking capability	✗	-
Optimised for mobile access	✓	-
Social media presence	✓	Although, social media buttons need to be integrated into the website so easy to find.

[64] Note these financials represent only income/expenditure attributed to the VC. It does not include consolidated income/expenditure from events which the VC manages (e.g. Karri Cup and Blooming Wild Festival).

6.5. Pemberton VC

6.5.1. Overview

Table 17: Snapshot of Pemberton VC[65]

About	Description
LGA	Manjimup Shire
Location	Brockman St, Pemberton WA 6260
Operating Hours	Weekday: 9am-5pm, Weekend: 9am - 5pm
Operating Structure	Independent not-for-profit run business
Co-located or Standalone	Co-located with the Pemberton Museum
Website	http://www.pembertonvisitor.com.au/
Visitation (2016 FY)	74,627
Staff	1 manager (0.4 FTE), 3 p/t (1 FTE), 2 casuals, 10 volunteers
Accredited	Yes[66]
Members	54

Pemberton VC is located in the old school building on the main street of Pemberton and includes the Pemberton Pioneer Museum. Whilst the VC is co-located physically, with Pemberton Arts Group, the CRC and a few others, they are not operated as a co-located entity.

The VC is accredited and provides accommodation and tour bookings via a Bookeasy website/booking system. It is open 363 days of the year (closed Christmas Day and Boxing Day).

We understand that the Pemberton VC will be relocating to a shared facility combining the Pemberton Community Resource Centre as well as the public library. Each of these facilities is currently located in separate facilities and none of the facilities meet current and future needs of their respective services. The primary purpose of the co-location is to ensure each of the respective services are able to better meet the needs of their clients whilst also maximising resource sharing and potentially developing a shared management structure.[67]

Additionally, we note that Pemberton VC will also be taking over the management of the caravan park which they currently lease out. This will provide the VC with an additional income stream, however, we understand that the park needs considerable reinvestment and will also require a caretaker so the initial financial returns may be far lower than initially expected.[68] We note

[65] All visitor, membership and employment data sourced from discussions with LG and/or VC management.
[66] Value of Visitor Centres, Tourism Council WA, http://corporate.margaretriver.com/wp-content/uploads/2015/09/TCWA0173-Value-of-Visitor-Centres.pdf
[67] http://www.manjimup.wa.gov.au/our-places-and-spaces/libraries/Documents/Pemberton%20Co-location/PCLP%20-%20Information%20Package.pdf
[68] Based on discussions with WBAC.

that during peak periods (including long weekends), every site at this caravan park (and within the broader Pemberton area) is booked.

6.5.2. Operating Structure and Staffing

As indicated in Section 6.4, Pemberton VC is part of the recently formed Pemberton-Northcliffe not-for-profit community organisation. As a result, the two VCs share a manager and the proposed amalgamation allows them to reduce duplication of certain functions (admin, bookkeeping, website management etc.). Whilst we understand the boards of each of the VCs are separate, the VCs recently collaborated to form a shared membership database.

Whilst being independent of the Shire of Manjimup, the VC receives a fee for service from the Shire of Manjimup to cover a variety of operational costs as well as a peppercorn lease for the building they are situated within.

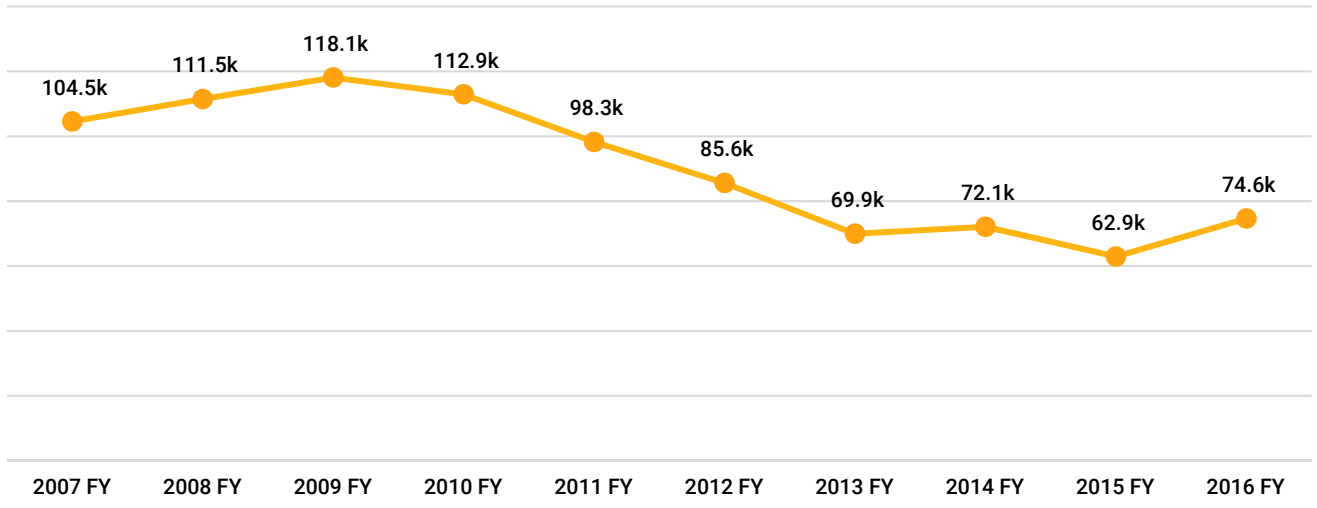
Currently, the manager of the two VCs spends approximately two days per week at Pemberton (0.4 FTE). In addition, the VC has 3 part-time staff members (1 FTE), 2 casuals as well as 10 volunteers which comprise: board volunteers (20 hours per month per volunteer), front counter volunteers (24 hours per month) and maintenance volunteers (100 hours per month) who look after the historic pool and mountain bike tracks.

6.5.3. Visitor Numbers

Over the last 10 years, Pemberton VC has experienced a significant decline in visitation, falling from a peak of 118k visitors in the 2009 FY to a low of just under 63k visitors in the 2015 FY, a total decline of 55k visitors (a 47% drop).

We understand that Pemberton VC, like Northcliffe VC, update their door counter values to reflect emails and phone calls received as “visitors” to the VC. On average, Pemberton VC add 30 additional “visitors” per day to their door counter log, which equates to 10,920 additional visitors per annum being recorded as having entered through the Pemberton VC. Going forward, a separate log for recording emails and phone calls should be kept to ensure the door counter stats wholly reflect actual visitors into the Pemberton VC.

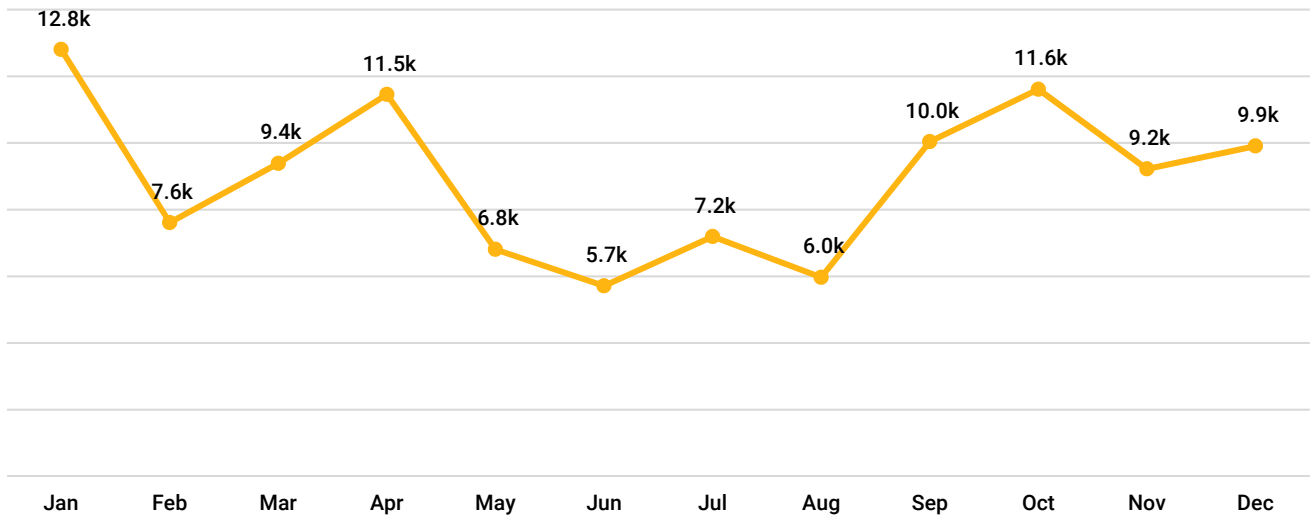
Figure 16: Pemberton VC Visitor Numbers[69]



[69] Provided by Pemberton VC. It is important to note that some VCs provided The Group with visitor data per calendar year whilst others provided financial year data (June YE). In order to allow for analysis and comparison of data across each VC, The Group has converted (where possible) all calendar year data to financial year.

Figure 17 below provides a summary of average visitation to the VC over the period 1996 – 2016. This demonstrates that the VC, on average, receives the majority of its visitors during school holiday periods, including December – January, April, September – October. Historically, the quietest months for the VC fall in winter, running from May – August.

Figure 17: Pemberton VC Peak Months of Visitation[70]

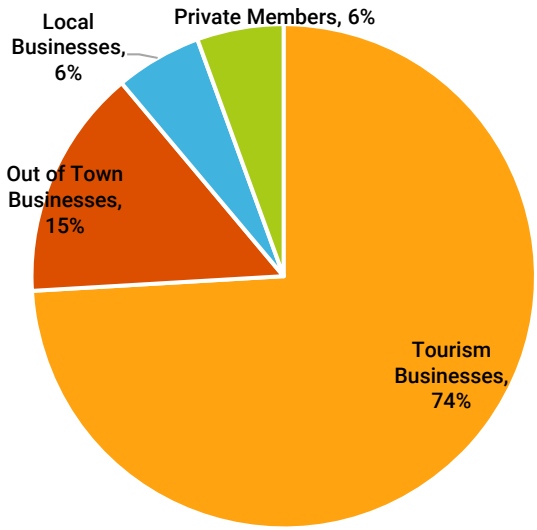


6.5.4. Membership

Pemberton VC has 54 members. The following figure provides a breakdown of membership type and demonstrates that the majority of members of the Pemberton VC are tourism businesses within Pemberton (making up 74% of members in 2016 and comprising 40 businesses in total), followed by out of town businesses (comprising 15% of members, or, 8 businesses) and private members and local businesses (each comprising 6% of members, or, 3 members).

Until a comprehensive breakdown of tourism product throughout Manjimup LGA and Pemberton specifically is available (including those who are not currently listed online), as well as a breakdown of the VC's membership (local businesses compared with those who are based out of the LGA), it is not possible to demonstrate the percentage of tourism businesses in Manjimup LGA and Pemberton specifically which the VC captures as members.

Figure 18: Pemberton VC Membership Breakdown



We understand that Pemberton VCs' membership base has remained relatively static at 54 members for several years. Encouraging new members to join can, at times, be difficult because there are numerous associations which are all vying for members who all work independently and who offer limited synergy for its members.

We also note that in Pemberton, in addition to the VC, there is an accommodation association and a chamber of commerce making it challenging to achieve an industry consensus going forward. It would be preferable to have all tourism membership based organisations

[70] Based on data from 1996 – 2016 provided by Pemberton VC

merged into a single tourism membership entity to allow for the easier determination of priority actions and related resourcing for these.

6.5.5. Financial Performance

Unfortunately, the data for Pemberton arrived after this report had been completed.

6.5.6. Digital Presence

Table 18: Pemberton VC Digital Presence Summary

Digital Media	Y/N	Comment
Website	✓	The design is dated and functionality is limited.
Online booking capability	✓	Booking system design and process is dated.
Optimised for mobile access	✗	-
Social media presence	✓	Although, social media buttons need to be integrated into the website so easy to find.

6.6. Walpole-Nornalup VC

6.6.1. Overview

Table 19: Snapshot of Walpole-Nornalup VC[71]

About	Description
LGA	Manjimup Shire
Location	Pioneer Park, South Coast Highway, Walpole WA 6398
Operating Hours	Weekday: 9am-4pm, Weekend: 9am - 4pm
Operating Structure	Independent not-for-profit run business
Co-located or Standalone	Standalone
Website	https://www.walpole.com.au/
Visitation (2016 FY)	49,183
Staff	1 manager (part-time, 0.3 FTE), 3 part-time (1 FTE) and 12 volunteers (2 FTE)
Accredited	Yes[72]
Members	126

The Walpole-Nornalup VC is located in Pioneer Park opposite the town centre of Walpole and is the southern gateway to the Manjimup LGA. The VC is an accredited centre and is open 364 days per year, with the exception of Christmas Day. The VC provides accommodation and tour bookings via a Bookeasy website/booking system.

Out of the six VCs assessed as part of this Business Plan, Walpole-Nornalup VC appear to have the most current web presence. The website has an updated attractive user interface which is mobile-friendly and the site incorporates booking functionality so that users are able to book both accommodation and tours online.

6.6.2. Operating Structure and Staffing

The Walpole-Nornalup VC is operated by an independent not-for-profit board. Whilst the VC is independent of the Shire of Manjimup, it receives a fee for service for the provision of visitor services as well as a peppercorn lease fee for the building they are situated in.

The VC operates with a manager (0.3 FTE), 3 part-time staff (1 FTE) as well as 12 volunteers (2 FTE).

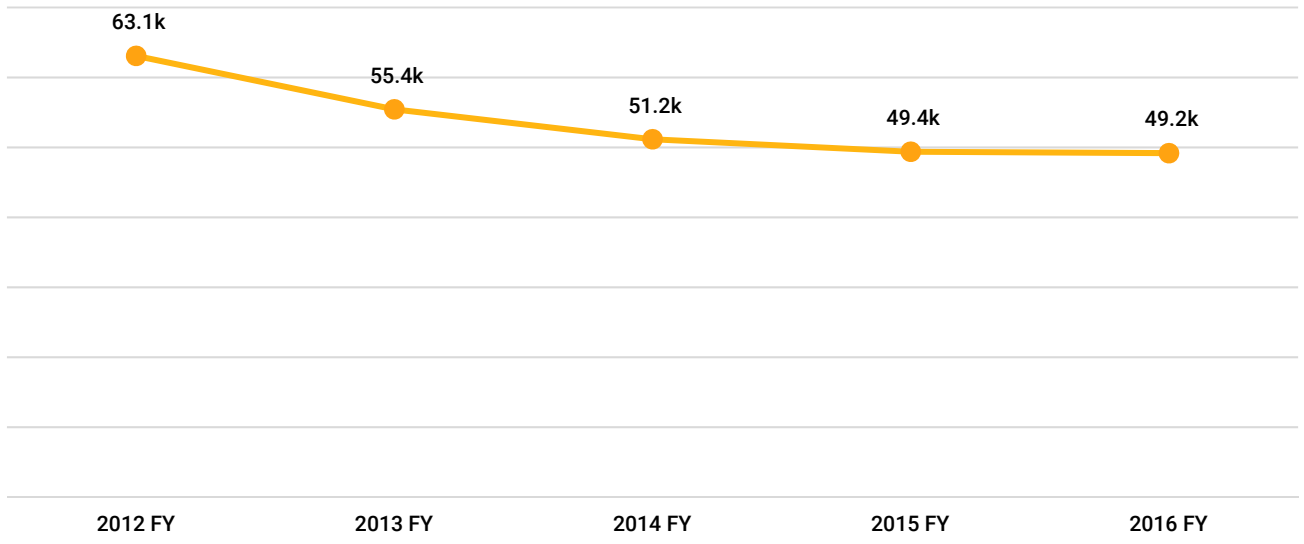
[71] All visitor, membership and employment data sourced from discussions with LG and/or VC management.
[72] Value of Visitor Centres, Tourism Council WA, http://corporate.margaretriver.com/wp-content/uploads/2015/09/TCWA0173-Value-of-Visitor-Centres.pdf

6.6.3. Visitor Numbers

Figure 19 below provides a summary of visitation to the Walpole-Nornalup VC over the five-year period from the 2012 FY – 2016 FY. Over this period, total visitation to the VC fell by 22% (a decline of just under 14k visitors).

We understand that to determine visitation into the VC, a door counter is used. The final daily figure is divided by two to eliminate double counting and an additional 20 – 40 is deducted to account for staff movements.

Figure 19: Walpole-Nornalup VC Visitor Numbers[73]

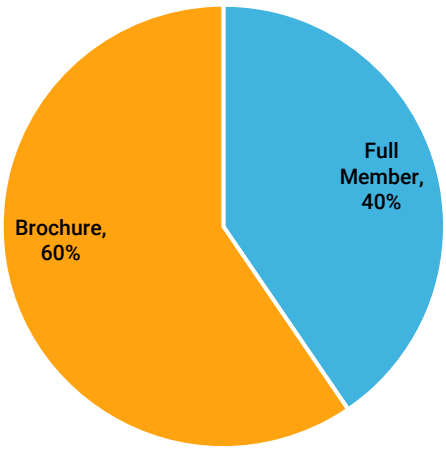


6.6.4. Membership

Walpole-Nornalup VC has a particularly strong membership base compared with the other VCs in the region. Figure 20 provides a breakdown of the VCs' members and demonstrates that the majority of the VCs' members are brochure only members (60% of total members) whilst the remainder are full members (40%).

It is also important to note that almost one-third (32%) of the VCs' members are based in Denmark LGA, demonstrating the strong ties which the VC has Denmark LGA, particularly as the VC acts as a gateway to the LGA and to major attractors such as the Valley of the Giants.

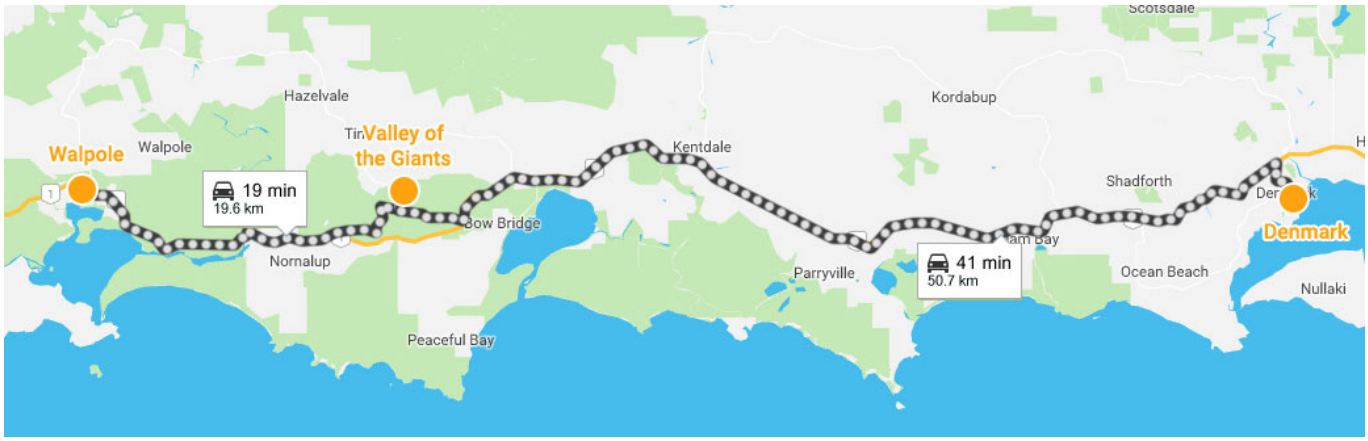
Figure 20: Walpole-Nornalup VC Membership Breakdown



[73] Provided by Walpole-Nornalup VC. It is important to note that some VCs provided The Group with visitor data per calendar year whilst others provided financial year data (June YE). In order to allow for analysis and comparison of data across each VC, The Group has converted (where possible) all calendar year data to financial year.

The following figure demonstrates the proximity of Walpole VC to the Valley of the Giants and illustrates that it is far closer to Walpole than to Denmark.

Figure 21: Proximity of Walpole to the Valley of the Giants



Until a comprehensive breakdown of tourism product throughout Manjimup LGA and Walpole specifically is available (including those who are not currently listed online), as well as a breakdown of the VC's membership (local businesses compared with those who are based out of the LGA), it is not possible to demonstrate the percentage of tourism businesses in Manjimup LGA and Walpole specifically which the VC captures as members.

6.6.5. Financial Performance

Table 20 provides an overview of Walpole VC's financial performance over the 2015 and 2016 financial years. This demonstrates the following:

- In the 2016 FY, the VC generated total revenue of just under $242k, a decline of just under -$325k from the previous year. A major source of this decline was a drop in accommodation bookings income, falling by -$153k.
- Gross profit (total income less COGS), however, increased by 14% ($12k) as a result of a significant decline in the COGS for the VC (falling by $337k).
- Operating expenditure increased by $9.6k (a 7% increase). The major expenditure item for the VC in the 2016 FY was employee expenses, comprising 66% of all expenditure. It is important to note that no lease fee is charged to the VC by the Shire of Manjimup.
- In the 2016 FY, the VC produced a net loss of just over -$7k.
- In the 2016 FY, for every visitor that entered the VC, $2.11 in gross profit and $3.11 in expenditure was generated, equating to a net loss (when the "other income" and "other expenses" line items are included) of -$0.15 per visitor.

Table 20: Walpole-Nornalup VC Financial Performance

	2014/15	2015/16	Change	p/Visitor (2015/16)
Total Revenue	$566,249	$241,518	-$324,731	$4.91
COGS	$475,126	$137,985	-$337,141	-
Gross Profit	$91,123	$103,533	$12,409	$2.11
Operating Expenses	$143,221	$152,845	$9,625	$3.11
Other Income	$59,073	$44,307	-$14,766	-
Other Expenses	$2,859	$2,465	-$393	-
Net Profit/Loss	**$4,117**	**-$7,471**	**-$11,588**	**-$0.15**

6.6.6. Digital Presence

Table 21: Walpole-Nornalup VC Digital Presence Summary

Digital Media	Y/N	Comment
Website	✓	Yes
Online booking capability	✓	Yes
Optimised for mobile access	✓	Yes
Social media presence	✓	Yes, although, social media buttons need to be integrated into the website so easy to find.

6.7. Visitor Centre Use

6.7.1. Local Versus Visitor Use

The following table provides a summary of estimated visitors into each VC and breaks visitation down by local use and "true" visitor use, based on discussions with each VC and/or each LG. This demonstrates that Bridgetown-Greenbushes has the highest assumed local use, where it is estimated that 20% of visits into the VC are by locals whilst Pemberton receives the smallest proportion of local use, comprising 5% of total VC visitation.

The results in Table 22 are based on direct feedback from each of the VCs and LGs. We consider that the local use estimated is far lower than we would have assumed and which many other VCs in other states and territories would receive. If there was a move to a co-located model, it is likely that the ratio of local users will significantly increase as well.

A further point which needs to be noted is the high percentage of enquiries which are not directly related to visitor information needs such as bushfire enquiries and bus tickets. By way of example, Manjimup and Pemberton VCs both estimated that at least 50% of all enquiries are not directly related to tourism.[74]

Table 22: Local Versus Visitor Use

	% Local Use[75]	% True Visitor Use	Local Use	True Visitor Use	Total Use
Bridgetown-Greenbushes VC	20.0%	80.0%	5,112	20,446	25,558
Manjimup VC	12.5%	87.5%	5,936	41,555	47,491
Nannup VC	10.0%	90.0%	621	5,591	6,212
Northcliffe VC	10.0%	90.0%	3,340	30,058	33,398
Pemberton VC	5.0%	95.0%	3,731	70,896	74,627
Walpole-Nornalup VC	10.0%	90.0%	4,918	44,265	49,183

6.7.2. Penetration of the Visitor Market

The following table provides a summary of estimated "true" visitors into each VC (as provided by each VC and/or LG), compared with the estimated number of visitors to each associated LGA. This demonstrates the following:

- Pemberton VC captures the greatest proportion (23%) of total visitors that travel to its associated LGA (Manjimup LGA), followed by Bridgetown-Greenbushes (21%).
- Nannup VC achieves the smallest share of visitors, capturing only 7% of visitors to its associated LGA (Nannup LGA);

[74] Based on Appendix 3 – Visitor Centre Operations Summary, A Sustainable LTO Tourism Model for the Warren Blackwood Alliance, July 2016.
[75] Based on discussions with VCs and/or LGs

- On average, the VCs in the WBAC region capture an estimated 15% of total visitors to the region. It is important to note, however, that this would likely include an element of double counting as the same visitor may visit more than one VC. This visitation is, therefore, not unique visitation.

Most importantly, what this data demonstrates is that, on average, 85% of visitors to the WBAC region are not using the VC facilities. The vexed question, therefore, is how best to reach these 413k visitors[76] who currently do not utilise VC services.

Table 23: VC Penetration

	Size of LGA Visitor Market[77]	VC Visitation - True Visitors Only	True Visitor Penetration
Bridgetown-Greenbushes VC	95,905	20,446	21%
Manjimup VC	308,000	41,555	13%
Nannup VC	82,813	5,591	7%
Northcliffe VC	308,000	30,058	10%
Pemberton VC	308,000	70,896	23%
Walpole-Nornalup VC	308,000	44,265	14%
Average Penetration	-	-[78]	**15%**

6.8. Local Government Contribution to Visitor Services

Table 24 below provides an indication of current advised expenditure by each of the LGs for the six VCs in the WBAC region. It is important to note that this includes not only the LG fee for service but also incorporates an estimated indicative lease fee for each of the VCs.[79]

The figures for Bridgetown-Greenbushes alone of $237k expenditure per annum reflects an LG run VC whilst the others are mostly run by not-for-profit associations without a number of LG costs included. The financial figures derived below should, in our opinion, be treated with great care. Without the determination of the true overhead and related costs (including relevant LG incurred cost items from within various internal departments), it is not possible to accurately determine the real cost of providing visitors services including those needed to support VCs. We would, therefore, question whether the true financial cost for each of the four VCs in the Manjimup LGA has been fully captured, though, at a superficial top line level, they appear to be relatively inexpensive to operate.

We also note that most of the VCs do minimal, if any, destination marketing, have limited digital presence (with the exception of Walpole-Nornalup VC) and appear to struggle to get strong industry support. We, therefore, question whether the return on investment from existing visitor services across the WBAC sub-region is actually generating optimal outcomes even though some VC operations may appear inexpensive to operate.

[76] Based on Table 23, average VC use in the WBAC region is 15%. Total visitation to the WBAC region is estimated at 487k (see Figure 8 for a breakdown). Applying this VC use percentage to total WBAC visitation demonstrates that an estimated 73k visitors use VCs, whilst the remaining 413k visitors to the region do not utilise VCs.
[77] See Section 3.4 of this report for a breakdown of how visitation to each LG was derived.
[78] It is not possible to tally this column as a number of visitors into the WBAC sub-region visit more than one VC and, therefore, the risk of double counting is high. The estimate of 73k visitors who utilise VCs in the WBAC sub-region, therefore, represents unique visitation and excludes repeat users.
[79] Estimated discounted lease fees incorporated into the table include: Bridgetown-Greenbushes VC - $10,440, Manjimup VC - $20,880, Nannup VC - n/a, Northcliffe VC - $10,440, Pemberton VC - $10,440 and Walpole-Nornalup VC - $10,440. Manjimup VC's indicative lease fee is higher because the site is seen as a more prominent site in the largest town in the WBAC region.

Table 24: LG Contribution to VCs[80]

	Shire of Manjimup	Shire of Bridgetown-Greenbushes	Shire of Nannup	Total	Visitation	Cost per Visitor
Bridgetown-Greenbushes VC	-	$236,993	-	**$236,993**	25,558	$9.27
Manjimup VC	$54,630	-	-	**$54,630**	47,491	$1.15
Nannup VC	-	-	$10,000	**$10,000**	6,212	$1.61
Northcliffe VC	$44,190	-	-	**$44,190**	33,398	$1.32
Pemberton VC	$44,190	-	-	**$44,190**	74,627	$0.59
Walpole VC	$44,190	-	-	**$44,190**	49,183	$0.90
Marketing and Promotions	$149,359	-	-	**$149,359**	-	-
Total Funding	**$336,559**	**$236,993**	**$10,000**	**$583,552**	**236,469**	**$2.47**

Table 25 below demonstrates that average VC expenditure from a comparative assessment of 25 VCs throughout Australia, was $301.5k, with an average annual VC net operating loss of -$178k. The net cost (after all revenue was added in) per visitor, using the VCs was -$5.35 and the average percentage of visitors the VCs captures was 18% of total regional visitation.

It is also important to note that for each of these comparative VCs, the following applied:

- each was an accredited VC, operating 7 days per week;
- they had or were developing a strong digital presence;
- they had roving ambassador/volunteer programs to assist particularly during peak seasons and events;
- they generally had strong industry operator support;
- if there were more than one VC in a region, they tended to be operated by an umbrella organisation to allow for economist of scale;
- a number had an ongoing requirement to achieve a cost neutral/break even position; and
- the primary cost centre (60%+ of all expenses) were generally related to wages, salaries and on costs.

Table 25: Comparison of Select VC Performance in Australia and NZ[81]

	Average across 25 VCs
Total VIC Income	$123,494
Total VIC Expenditure	$301,498
VIC Surplus or Net Cost of Service (-)	-$178,005
Annual Visitors to VIC	38,229
Income p/visitor	$2.67
Expenditure p/visitor	$8.02
Net Surplus/Loss p/visitor	-$5.35
Number of visitors to region	382,426
% of visitors VIC is capturing	18%

[80] Based on discussions with each LG and VC managers.
[81] Note, a total of 25 VCs were assessed, including VCs in NSW, Tasmania, Queensland and New Zealand. An average has been provided as individual line items contain confidential data.

7. FACTORS TO CONSIDER

7.1. LTO Model

WBAC have advised that a new LTO model has been investigated to bring sub-regional tourism services for the three LGAs into one entity and to effectively offer what we would term a "one stop shop" for tourism. This follows the creation of LTOs in neighbouring regions and other parts of WA. At this stage, we understand that the preference of WBAC is to put visitor services (and VCs) under the control and management of the proposed LTO, though we understand this is still being discussed with each of the LGs.

It is not the intent of this Visitor Servicing Business Plan to comment on the merits of the proposed LTO structure and the integration of visitor services into it. Rather, we have noted that if visitor services were to be moved to an LTO structure across the three LGAs, that care would need to be taken to ensure that the LTO model was suitably set up to offer better value adds for visitor services in order to achieve stronger buy-in and support. We see this as an important outcome to meet local industry expectations.

Visitor services specifically could potentially sit within an LTO structure, providing that the following is achieved.

- A strong level of operator support was forthcoming to work with the new model.
- That local industry operators were not being charged twice for visitor service support (i.e. that a fee being charged for visitor centre membership was either collected by the LTO, or, by any local LGA tourism association, but not both).
- That because a standardised approach to visitor services would be preferable, that an equitable funding arrangement should be agreed to by the three LGs to reflect this (for many LGs working via shared service agreements, this is often best achieved from an agreed per capita levy applied equally across participating LGs).
- That funding for visitor services (and associated VCs) was delineated specifically for this purpose, rather than being put into a consolidated fund for all tourism administration and related expenditure. It is important to maintain a highly transparent funding pool for visitor services explicitly so that the three LGs and their communities can see where and how this per capita funding contribution is applied.

7.2. Leveraging off Surrounding Destinations

It is important to note that visitors do not recognise LGA or regional boundaries; they travel seamlessly from one attraction/experience/location to the next. For many travellers, the growing preference is also establishing a base/a hub in one location and undertaking day excursions from there.

The strength of surrounding destinations, such as the Margaret River and Albany, need to be leveraged off, to grow day and overnight visitation. It is noted that Nannup receives good numbers of visitors from the Margaret River as the drive is only approximately 45 minutes. For Albany, the challenge is greater as anecdotal feedback indicates that most travellers travel through the WBAC region en route to Denmark and Albany, rather than coming back through Walpole. But the point of visitors finding a good base to do day trip excursions from is important to recognise.

Finding clever ways to link into visitor servicing for the Margaret River[82], through a potential wider regional circuit, should be an initiative explored. Whilst a number of stakeholders were aware of the inroads achieved by the Margaret River in food tourism, on top of their national wine tourism focus, much can still be done to grow connections and visitation into the WBAC region. Whether Southern Forests Food Council can help activate food trails potentially from the Margaret River to drive food tourism needs to be further explored.

7.3. Visitor Centre Role

Most VCs commented that up to 70% of all enquiries they deal with are not directly related to their members or tourism directly – e.g. where are the toilets, what schools are in the town, road closures and emergency information (e.g. fire), etc. They, therefore, provide a valuable community service along with supporting visitor needs. Some of this information is requested by visitors and at other times, locals seek out this information from VCs as a reliable and accurate source.

It is often questionable how much of a VC's role is actually closer aligned to offering community or related support so that the allocation of LG funds for VCs needs to recognise the wider role being played. At times, LGs look at VC contributions as assistance just to the tourism industry, but for most VCs, this is not the case.

Part of the principle behind operational co-location is the strong service delivery and customer focus synergies between VC, libraries and CRCs.

7.4. Lack of Major Visitor Attractors/Drawcards

Many stakeholders commented on the limited number of attractions and major experiences which visitors can undertake when in the region. Whilst the natural environment was often referred to as being one of the region's major strengths, there was recognition that this is not enough to draw visitors into the region and to want to stay longer.

The region would benefit from having a tourism development and investment strategy. The strategy could investigate potential tourism investment opportunities, ranging from accommodation, attractions and experiences, events and marketing opportunities at both a major and more localised level. This would also offer the commercial reality check on what is actually feasible to develop.

In order to grow visitor yield and to leverage off the large visitor market who are travelling to the neighbouring Margaret River region especially, there is a need to growth the WBAC product base. This would also encourage existing operators to create a range of packages to promote the region and encourage greater dispersal throughout the region.

7.5. Lack of Revenue Streams Associated with Trails

We note that the WBAC region has many walking trails and that, Northcliffe and Pemberton, in particular, have a particular strength in mountain biking trails. Whilst these trails are a great asset for the region and whilst we consider that mountain biking is a key product for the region going forward, there needs to be a strong link with this product to commercial revenue streams such as commercial guided tours, transport to/from these trails from towns/hubs, gear hire and packaging the trails with accommodation and food and beverage services etc.

Unless it is possible to get mountain bikers to actually spend more, the cost of trail maintenance alone could show this product as a net economic cost to the local economy though it offers many social and recreational benefits.

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[82] We understand that dialogue is already happening with ASW and discussion has been centred on how to draw visitors into the hinterland of the South West.

7.6. Need for Accurate Visitor Statistics

As detailed in Section 3.4 of this report, the WBAC region and the individual LGAs are challenged because of a lack of recorded visitor data. Whilst Bridgetown-Greenbushes and Manjimup LGAs do receive TRA visitor data, this is problematic because of sample size issues[83] which result in large margins of error. Additionally, for Nannup, no visitor data is provided by TRA (we suspect this is because of sample size).

Ascertaining visitation to the WBAC was also further challenged by the varying boundaries at a sub-regional and LTO level which meant that whilst the Shire of Boyup Brook is included within the Blackwood River Valley sub-region (as defined by ASW), it is not included within the WBAC region. And, therefore, whilst TRA does provide estimated visitation data to the Blackwood River Valley sub-region, visitation to the Shire of Boyup Brook needs to be deducted to determine visitation to the two LGAs within this sub-region which also fall in the WBAC region (Nannup and Bridgetown-Greenbushes). This is challenging because TRA does not produce LGA-level visitation data for Boyup Brook. Therefore, The Group held discussions with stakeholders to fill this gap, though, it is an estimate only.

A bottom-up approach was, therefore, followed by The Group in determining estimated visitation to the WBAC region. Firstly, The Group determined visitation to each LGA within the ASW region. These LGAs were then grouped into their associated sub-regions, which were then totalled to identify total ASW visitation. By following a "bottom-up" approach, a different picture of visitation to the ASW region was identified, with an estimate of 220k fewer visitors to the WBAC sub-region.

This demonstrates the significant challenge associated with visitor data for the region. There is a need to develop an appropriate model for collecting and recording visitor data so that each LGA has a dataset which it can rely on going forward. There is a need to ensure this dataset is collected on a continuous basis so that trend analysis can then be performed.

Whilst comment was received on declining visitation to the WBAC region and individual LGAs and towns, there is no trend data available to support these assertions. Having a robust set of data will enable the LGAs to view trends in visitation, and particularly, be able to potentially demonstrate where changes made by the LGs and tourism industry have resulted in stronger visitation and growth of the visitor economy.

7.7. Need for a Consistent Approach to Recording VC Visitation

In addition to there being challenges with the tourism data sets for the LGAs and the broader region, there is also an inconsistent approach undertaken for recording visitor entry into each of the VCs throughout the region.

Regardless of what operating model is adopting for the VCs going into the future, there is a need to ensure a consistent approach is followed so that comparisons can be undertaken on visitor use of each VC.

The approach followed should include the following:

- Ensuring that daily tally figures are divided by two to ensure there is no double counting occurring through electronic door counters.
- Ensuring a figure is deducted from daily visitor tallies based on the number of staff which work each day at the VCs and shift changes which may occur. This often means that total door counters need to be divided by 2.35 to achieve a more accurate assessment.

[83] By way of example, for Bridgetown-Greenbushes Shire, no visitor data is provided for domestic day visitation because of sample size issues.

- Ensuring that a figure is deducted each day based on any additional workers etc. which may visit the VC (by way of example, we note Pemberton VC also operates as a base for parcels – any entry by these workers should be deducted).
- Rather than counting phone and email queries as "visits" and adding them to the daily visitor tallies, there is a need to create a separate log to keep track of phone and email queries (as these are not visitors to the VC).
- There is a need to also keep track of local versus visitor use of the VC because as community and visitor needs change, the types of services being provided may need to alter and this data may help support this.
- There is a need to, where possible, record the origin of visitors as this data will help in building the WBAC regional visitor profile.

A uniform template for the above should be developed and employed by each of the VCs. A quarterly report should be compiled and released to each VC for their records. Because of the different methodologies currently applied by each VC in collecting visitation, this report should only focus on data compiled utilising the uniform methodology suggested above.

7.8. Gradual Integration of Visitor Services

From a visitor services perspective, the three individual LGs are working toward a more collaborative approach through combining on visitor guides, ASW marketing, trails etc. However, there is still limited product packaging and destination promotion of the overall region.

A coordinated approach, from an umbrella organisation, could allow for far more interaction for visitor services across the three LGAs, but would still enable the unique identity of each LGA to be maintained and showcased.

As indicated above, and as part of this regional visitor services approach, the opportunity should exist to coordinate and enhance local visitor services websites with the regional website, to provide an easier and more streamlined way to access information and, more importantly, to showcase packaged product which offers greater appeal to current and future visitor market segments.

7.9. Lack of Coordinated Marketing Approach

A challenge mentioned by many operators throughout the WBAC region is the preference of LGs and operators in individual areas to try and sell product on a local basis rather than on a regional basis. In reality, the strength of the WBAC region is the *"sum of its parts"*, that is, there is greater synergy, leverage opportunity and overall benefit in marketing collectively on a regional basis, particularly where there is a lack of product and/or where the product mix on a regional basis is a far stronger and offers a more compelling proposition.

What needs to be addressed are the strong parochial challenges of individual local areas wanting to capture more of the visitor nights individually rather than trying to grow the size of the regional "pie" which can generate stronger visitor flows generally into local areas. We note that the WBAC region has a number of small niche product opportunities which individually would struggle to capture sufficient visitor markets but, when effectively packaged with other attractive and comparable quality product available throughout the region, could offer an appealing product mix to package up.

7.10. Lack of Updated/Consistent Digital Presence

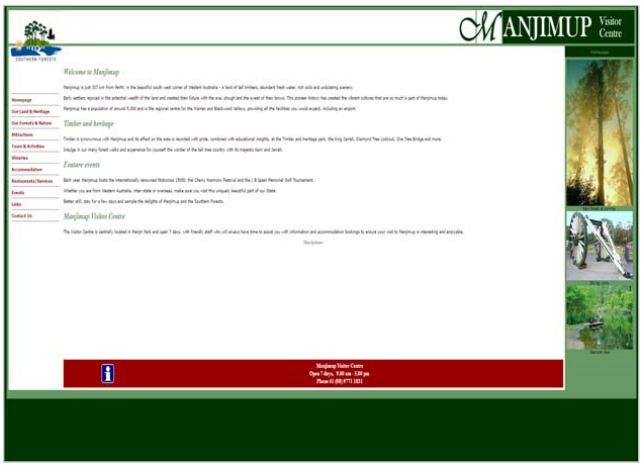
As indicated earlier, there is a need to develop an updated digital presence for the three LGAs. Whilst an estimated 15% of visitors to the WBAC region do utilise the VCs, an even greater number (85%) rely on other sources of information when visiting the region. With the rapid growth of technology and the shift in trends to booking and sourcing information online, it is imperative that the region keeps up with these trends.

7.10.1. The Current VC Websites

The following figure provides screenshots of each of the VCs websites. It demonstrates that many of the websites for the VCs, which tend to be one of the primary destination promotion platforms for each of the LGAs and the region generally, are outdated and could do with design and functionality enhancements (with the exception of the Walpole-Nornalup VC).

Figure 22: VC Website Overview

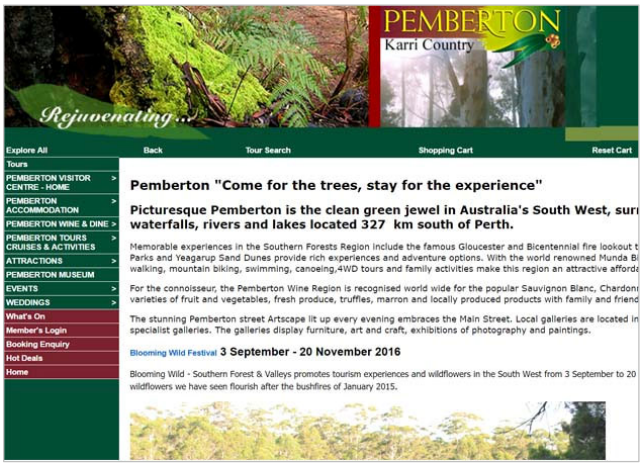
Bridgetown-Greenbushes VC



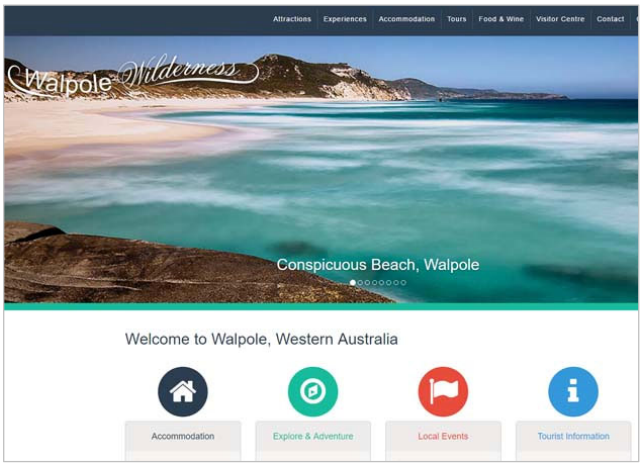
Manjimup VC

Nannup VC

Northcliffe VC



Pemberton VC

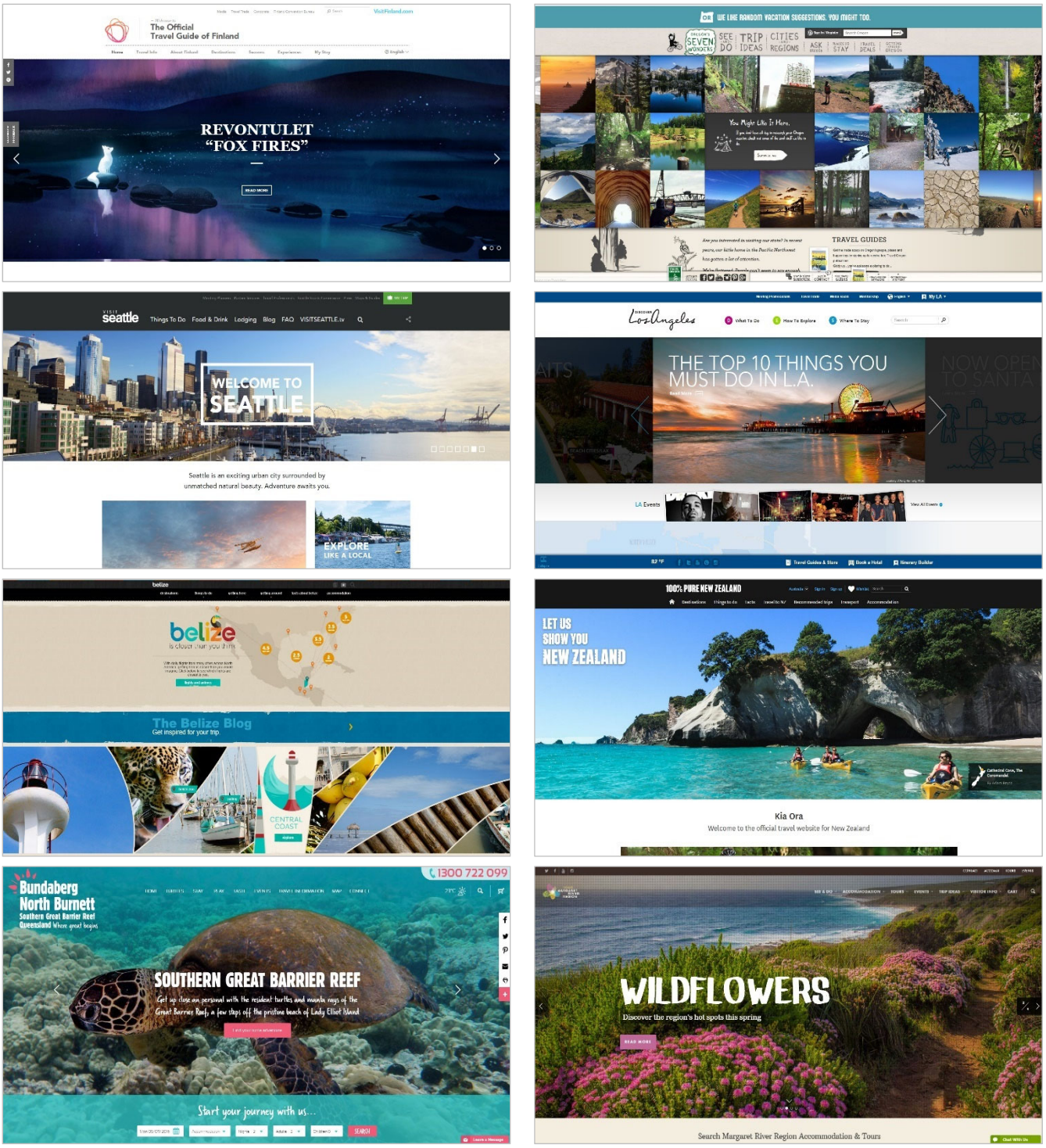


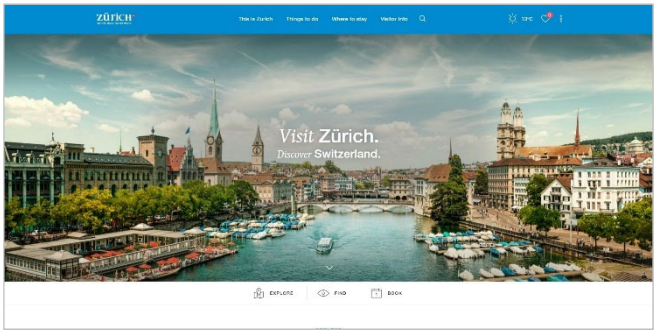
Walpole-Nornalup VC

7.10.2. Best Practice Destination Websites

Figure 23 demonstrates a variety of best practice destination website examples. Whilst some of these websites are for destinations and regions far larger than the WBAC region, there is value in investigating these examples as they provide valuable learning tools as to key features and user interface requirements which visitors now expect.

Figure 23: Examples of Best Practice Destination Websites





7.10.3. Audit of Destination Tourism Websites

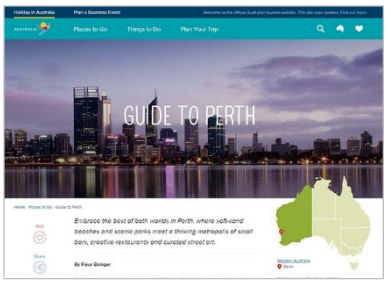
It is important to note, however, that developing a destination website for the WBAC region is an exercise which would likely be outside the current budgets of each of the VCs. It is recommended that, regardless of the outcome of the LTO exercise, that the three LGs consider combining resources to develop one quality destination website, with portals for each of the LGAs, key towns and information on each of the VCs.

Not only will this assist in keeping an up to date presence for the entire WBAC region, but it will reduce the "proliferation" of destination-based pages which require constant updating and can often cause confusion for visitors. By having the individual portals will ensure that each LGA is represented with a unique look and feel.

Figure 24 provides an overview of current destination websites which promote WA and the various towns and LGAs within the WBAC region. It demonstrates that from a national level down to a local level, there are 15 websites which promote the WBAC region[84]. It is important to note that this audit excluded any Facebook-based and other social media sites/portals which promote the region as well as private destination promotion websites so the actual number of sites is likely to be far greater. What this does demonstrate, however, is the plethora of destination-based websites and the need to consolidate destination-based promotion at the sub-regional and local levels to ensure a consistent level of information and a consistent quality of experience is provided. Particularly at the sub-regional and local levels, the quality of destination-based websites varies significantly.

Figure 24: Audit of Destination Tourism Websites

National & State Level



Tourism Australia

Tourism Western Australia

DPAW

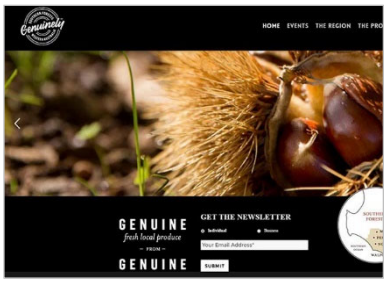
[84] Though the exposure of the various LGAs and towns across the different levels of destination websites occurs to varying degrees.

Regional Level

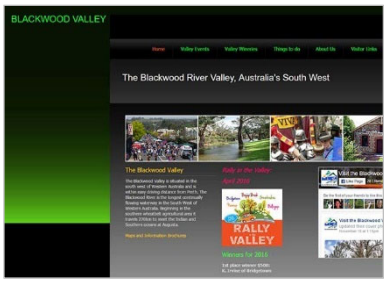
Australia's South West

Sub-regional Level

Southern Forests Tourism



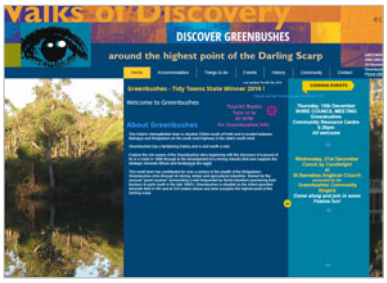
Southern Forests Food Council



Blackwood River Valley

Local Level

Bridgetown-Greenbushes VC



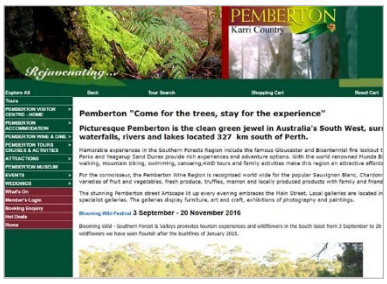
Greenbushes Discovery Centre

Manjimup VC

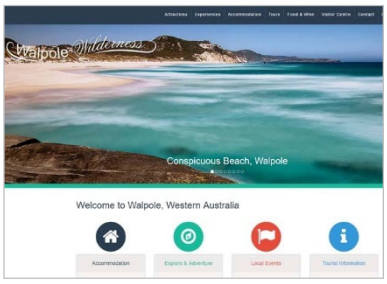
Everything Nannup (Nannup VC)

A Taste of Nannup (Nannup VC)

Northcliffe VC



Pemberton VC



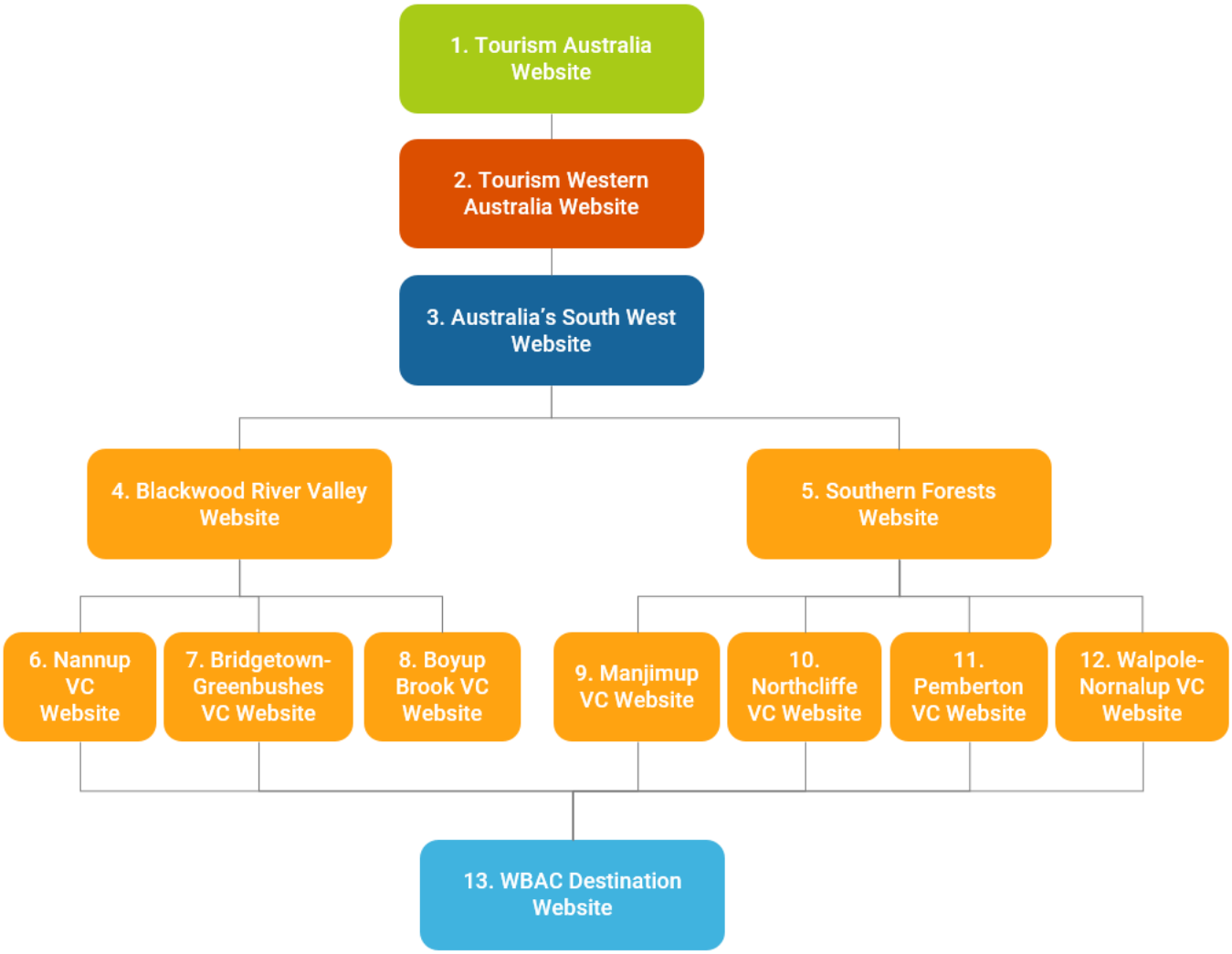
Walpole-Nornalup VC

7.10.4. Amalgamation of Websites

Currently, from a state to a local level, there are 11 websites whose primary focus is to promote destinations and provide visitor information. Figure 25 provides a summary of these destination-based websites and demonstrates how a WBAC destination website could fit into this flow and, most importantly, it demonstrates the need for the amalgamation of websites to simplify the visitor experience. It also shows that if a WBAC destination website was developed, it would be problematic to attempt to amalgamate the two sub-regional destination sites (Blackwood River Valley and Southern Forests) because the Blackwood River Valley site also covers the Shire of Boyup Brook[85].

Figure 26, on the other hand, demonstrates the potential amalgamation of websites, with the proposed destination website covering not only the WBAC region but also including Boyup Brook so that the destination website aligns with the two sub-regional boundaries. This would provide visitors with a much easier digital experience and would enable the sub-regional destination website to be a "one-stop shop" for visitor information and destination promotion.

Figure 25: Destination Website Flow Without Amalgamation of Sites[86]



[85] We note the Shire of Boyup Brook used to be part of the WBAC sub-region but left a few years ago.
[86] Note this flow chart focuses specifically on websites with the specific focus of promoting tourism regions or towns. It does not include those such as DPAWs or the Southern Forest Food Council.

Figure 26: Suggested Destination Website Flow with Amalgamation of Sites

7.10.5. The Need for a Destination Website

The combined destination website should also include booking functionality which will allow visitors to book accommodation and tours etc. throughout the WBAC region. Currently, only Bridgetown-Greenbushes, Pemberton and Walpole-Nornalup VCs offer online booking functionality. Expanding this feature for the whole of the WBAC region will ensure users are provided with a consistent level of service delivery throughout the region.

We understand that there are a number of operators throughout the WBAC region who currently are not yet "online". There are likely to be a variety of reasons for this including:

- a lack of understanding/awareness surrounding websites and booking system options;
- poor internet connections outside town centres; and
- ambivalence surrounding the need to be "online".

To overcome some of these challenges, a series of workshops in various locations throughout the WBAC region could be held to provide step by step instructions on how to get "online", including:

- being listed in the Australian Tourism Data Warehouse (which is where the destination website would be pulling information from);
- setting up some form of web presence (possibly via a Facebook Business Page as a simpler form of promotion and contact);
- more advanced workshops on online booking systems (possibly focusing on the booking system which the destination website may use; and
- providing an overview of locations throughout each of the LGAs which have reliable internet connections (such as libraries) which operators could use until such a time as more reliable internet is available outside town centres (though we note that the NBN is soon to be installed in several towns throughout the WBAC region[87]).

7.11. Signage

With respect to visitor road signage, the WBAC region's directional signage was good with road signs in good condition and well located.

Current town gateway signage is only relevant to the town experiences travellers are entering into. This inadvertently undersells the wider region which collectively has more to offer. Signage ideally needs to profile the major attractions which visitors identify with, such as, the Diamond Tree, the Gloucester Tree, mountain biking trails, Windy Harbour and related fishing experiences etc.

Figure 27: Current Gateway Signage Examples

Consideration should also be given to enhanced gateway signage for those entering from the north via Bridgetown-Greenbushes and from the south at Walpole. Where possible, consideration should also be given to introducing interpretative signage which may need to be developed around lay-bys and easily accessible visitor attractions such as walking trail access points, unique flora changes and areas of more significant geology.

The interpretation of sites and facilities is currently only able to be gathered within town centres. Because of the vast distance between some of the major towns (i.e. Manjimup to Walpole), there is a need to introduce interpretative signage which can better showcase sites of significance. As an area rich in natural assets and associated attractions, it is important to encourage travellers to stop and visit these sites as part of their journey through the region.

[87] Including in Bridgetown-Greenbushes, Manjimup and Walpole (http://www.nbnco.com.au/learn-about-the-nbn/rollout-map.html) though we note this is not guaranteed.

7.12. Agritourism

The potential for agritourism (food trails etc.) is noted by many stakeholders as a major product opportunity for the WBAC region. The Southern Forests Food Council is the umbrella organisation driving the marketing and raising awareness surrounding opportunities for this sub-sector. In discussions with them, the potential for creating food trails and more regular farmers markets was noted.

In developing this sub-sector and its product potential, care is needed to ensure the sector is ready for tourism. This needs to include:

- making sure farmers and other related stakeholders are ready to offer cellar door experiences;
- that farmers are prepared to open over the weekend when visitors may be more likely to visit;
- that product display, packaging and quality control is consistent to ensure that all packaged product offers a uniform quality; and
- that promotional initiatives are well integrated into tourism and visitor servicing websites and regional campaigns.

There is a need for a robust food tourism strategy to provide detailed recommendations and an action plan for achieving the above, as these fall out of the scope of this Visitor Servicing Business Plan.

If this opportunity is to be expanded successfully across the WBAC region, then wider visitor servicing for this important sub-sector of tourism needs to be consistently promoted across the three LGAs.

In addition, opportunities to leverage off existing food/agritourism hubs and trails in the Margaret River region also need to be linked in to help offer new product and diversity of packages.

7.13. Distance Between Towns

Figure 28 provides an overview of the driving distances between many of the VCs in the WBAC region and demonstrates the vast area which the WBAC region covers (an estimated 11,672 km$^{2)}$. Because of the driving distances between many of the major towns in the region, there is a need to ensure visitors are able to receive visitor information when reaching major towns.

If the rationalisation model was considered, there is a need to ensure that visitors are still able to access visitor information in each of the major towns. This could include providing comprehensive visitor information via touch screens at strategically placed locations (which pulls data from the regional website created) as well as potentially having roving ambassadors on peak days throughout the year (and during events).

When the NBN rollout occurs[88] and internet services are faster and more reliable, it is important that a digital presence is strongly promoted including the use of technology such as touch screens to offer faster and more consistent information.

[88] Whilst scheduled over the next few years, we understand this rollout is not guaranteed. We understand that currently Manjimup has relatively high speed internet now with the NBN to follow, Walpole has fixed wireless, Pemberton has NBN planned and Northcliffe has satellite only.

Figure 28: Driving Times Between VCs[89]

[89] Based on Google Maps

7.14. DPAW

The Department of Parks and Wildlife plays a pivotal role not only in conservation and land management but also as a provider of attractions and visitor services. In some jurisdictions such as NSW, the equivalent state body (NPWS) operates VCs. For some of these, it collocates with LG-based visitor services such as in the Snowy Mountains region to offer shared amenities where National Parks are a dominant land manager.

In discussions with DPAW, it is evident that there may be potential to collocate DPAW visitor services with some of the existing VCs but on a seasonal basis. The growth in mountain biking and the use of DPAW land for these trails along with walking trails highlights but one area where a more synergist approach to offering shared visitor services could be beneficial to consumers and other stakeholders. Other areas of information synergy include general trail access, difficulty and quality, fire risk and related danger, and information on fauna and flora to encourage more people to stop, stay and spend to better appreciate what the WBAC region has to offer.

As the major landholder and manager within the WBAC region, having DPAW within the visitor services mix and an active player could be an important value-add for tourism and offer a valuable partnership to help support visitor services generally.

8. POTENTIAL OPERATIONAL MODELS

The following section covers potential operational models for the operation of the VCs for the WBAC region. It also details additional visitor services which could be provided to enhance the visitor experience.

The models include:

Model 1 – Centralised Visitor Servicing Model	Model 2 – Local Government Co-Location Model
Model 3 – Digital Visitor Servicing	Model 4 – Rationalisation Model

8.1. Model 1 – Centralised Visitor Servicing Model

8.1.1. Overview

It is proposed by WBAC that visitor services come under the proposed LTO on the basis that a separate budget item for visitor services is identified and used for this purpose rather than as part of a general marketing and support budget, where various other activities would be considered along with it.

Visitor services under this model would operate via a sub-regional strategic alliance to better manage a number of back-of-house services. This would include marketing, finance and auditing, purchasing and merchandise as well as IT support. All could be centrally managed through the LTO for the supply of visitor services.

8.1.2. Benefits

There are a variety of benefits which would accrue from the creation of a centralised visitor servicing model. Under this model, the various benefits would include the following:

- Auditing, financing and financial management would be centralised leading to uniform reporting.
- Information technology and related support and training would be centralised.
- Procurement of equipment would be centralised leading to improved leverage to achieve cheaper purchase prices.
- Human resource support, contracts and contractual arrangements could be standardised leading to a uniform operating process.
- Training programs for both staff and volunteers could be standardised.
- Merchandise monitoring and purchasing would be standardised.
- Elements of fit out including display stands and other key elements of supporting infrastructure could be standardised.
- A model for valuing the opportunity cost associated with the leasing of buildings by LGs for visitor centre use could also be standardised.

- Opportunities for collocating other appropriate services which might include community resource centres, libraries, art galleries and social history museums and potentially other activities could also be standardised as a base model.

The ability to operate, manage and create uniqueness which each visitor centre could retain as part of the location in which it is positioned, would still be available. Rather, the back of house operating systems, procedures etc. should be standardised wherever possible to reduce duplication and associated costs.

Because each of the current VCs is quite different in the style of building it occupies as well as its layout, one would avoid the risk of a "vanilla flavour" being created across all VCs so the look and feel could be retained.

Importantly, by centralising these important back-of-house support services, there is also the opportunity to ensure greater quality control, particularly in regard to accreditation which should be mandatory for all VCs. Whether these relate to level one or level two accreditation levels, is something which can be determined in the future. For the interim, offering a centralised approach as indicated above, provides an improved approach for offering accredited VCs to meet state-based and national standards.

Under this model, having a centralised tourism body who effectively manages visitor servicing would be desirable.

8.2. Model 2 – LG Co-Location Model

8.2.1. Overview

The LG co-location model is focused on putting visitor services alongside a variety of other primarily LG operated facilities whether this be part of a new major public amenity such as the proposed Timber Museum in Manjimup or co-locating with libraries, CRCs etc. in other locations. In addition, other activities could also be considered for co-location. Discussions with stakeholders and from models investigated elsewhere, options might include:

- a co-location of visitor services with libraries;
- community resource centres;
- art galleries and social history museums; and
- DPAW, but on a seasonal basis.

However, to maximise value to both consumers and industry operators, the location of VC's is critical to their success. Finding high profile locations with high passing pedestrian and/or traffic flows is a key requirement. This also entails locations which offer easy access from and back onto main roads and highways, and locations which can leverage off surrounding attractions and visitor-consumer demand for these.

To this extent, the location needs to firstly satisfy the requirements of visitor services rather than other co-located services and functions.

Whilst the above options clearly focus on public-based collocated facilities and amenities, potential might also exist for VCs to collocate with major accommodation establishments such as destination holiday parks (either owned privately or owned by LGs and operated via lease arrangements), or potentially with larger hotel/motel facilities where these exist.

It is important that as part of any location, there needs to be proof that other parties (for example, libraries, the CRC or DPAW) are actually able to offer value and a comparable quality of visitor servicing.

Additionally, co-location could include the sharing of some staff services where this is practical.

8.2.2. Benefits

The assumed benefits of co-location are likely to include (subject to specific arrangements with the co-location parties):

- the ability to share facilities and amenities;
- the potential to share staff servicing (for front counter assistance, by way of example);
- to provide opportunities to on sell various co-located attractions and amenities to support greater utilisation of facilities;
- to support more cost-effective ways of LGs, in particular, offering up a variety of facilities and amenities to support local communities; and
- to drive stronger relationships with other agencies (i.e. DPAW) if it is possible to collocate information services to support visitor and local inquiries.

Discussions with DPAW indicate there is more likely to be synergy and benefit on collocating based on delivering services, particularly during peak visitor periods and associated shoulder periods. In turn, this might mean that a portion of any collocated facility is only activated for only part of the year if this meets DPAW requirements.

There are issues which need to be carefully worked through, however, to do with quality control particularly in respect to servicing needs and requirements. If there was not only a shared location opportunity but the potential for sharing resources such as front of house/front counter staff, care would be needed so that enquiries for one use (i.e. community resource centre) could be dealt with in the same professional manner as general visitor servicing needs. Most likely, an effective training program would allow for this.

We note that some of the WBAC member councils are already considering ways to co-locate various services and facilities including visitor servicing.

8.3. Model 3 – Digital Visitor Servicing

8.3.1. Overview

The digital visitor servicing model presents a far stronger digital based solution for visitor information servicing. This model, over time, could be expected to lead to the potential closures of some VCs as online servicing becomes more prevalent and the need for accessing visitor information via a centre reduces.

Whilst the cost of digital based systems is generally lower than traditional bricks and mortar VCs, the cost of creating this, servicing it and upgrading it needs to be appraised as well.

The digital visitor servicing model firstly assumes that, within time, quality and fast internet services will be possible. This is likely to enable a wide range of visitors to effectively download information from appropriate websites as well as using apps which would provide most of the information required.

There is still likely to be a need, however, for a degree of face to face interaction. This is seen as beneficial to supplement the information able to be presented online. The mechanisms for providing this, however, may be a series of volunteer ambassadors who, with training, could provide an appropriate interface, particularly around events and potentially over holiday periods to fill information requests that cannot be delivered online.

A number of stakeholders commented that such a model would not be appropriate for the WBAC region because:

- many tourism operators do not have websites and lack internet skills generally;

- the quality of internet services is poor in many areas with no coverage although this is expected to change in some (but not all) locations in the next two years based on the NBN rollout[90]; and
- a belief that the predominant visitor markets (grey nomads) to the region are more likely to prefer face to face than an online presence.

We have provided in the supporting documentation a copy of the survey undertaken for the Sunshine Coast looking at visitor market needs and expectations for VCs. What that illustrates is that even the Grey Nomads are happy to move to an online information source if it is accurate, well maintained and easy to access.

8.3.2. Benefits

The digital visitor servicing model does provide a number of benefits including the following:

- Over time and with the ability to offer unmanned digital-based servicing solutions, some overhead operating costs are likely to reduce.
- The effective closure of some VCs in some of the towns within the region but, through the supply of high quality digital-based and touch screen technology, the needs of individual towns to promote themselves might not change.
- It is possible, through the provision of a digital platform to offer information which is updated weekly by a central body such as the proposed LTO if it is set up with the capability to do so.
- Introducing touch screen information boards in each of the towns could allow users to access information as well as via the website and the two could be easily linked.
- Potential could also exist to create a mobile visitor centre to be taken around various major events throughout the WBAC region so that information services can be provided at each event and which potentially could be manned as well.
- As previously indicated, the personal interface with locals could potentially be managed via a volunteer ambassador trained program to encourage locals to provide support and to offer the personal interface which is an added benefit particularly in more remote locations and during peak periods.
- There are also likely to be a variety of cost savings through the rationalisation of support services for VCs (i.e. back of house servicing and compliance requirements, in particular).
- As technology regularly changes, additional and enhanced technology application can be added to the digital platform which is put in place.

Touch screen technology by way of booths/kiosks already being used in a variety of locations including the Bundaberg region in Queensland amongst others. The purpose is to enable 24-hour information to assist not only visitors but also local members of the community wanting to obtain community-based information.

Over time, and as internet services become stronger within the WBAC region, the value of a quality website and potential information app will become more highly prized. In the interim, we can understand why there is a strong reluctance on the part of some stakeholders to look at an online based visitor servicing solution.

This model then may need to be viewed as a two-step model allowing for a transition from the current VC focused approach over time to a digitally focused model. Importantly, it is predicated on the ability of an online digital approach introduced and offering value-adds which a traditional model could not.

[90] http://www.nbnco.com.au/learn-about-the-nbn/rollout-map.html

8.4. Model 4 – Rationalisation Model

8.4.1. Overview

The rationalisation model is provided in reflection of the fact that there are six VCs currently within the WBAC region. Whilst the distances between some of the centres is sufficiently far to reflect the need for a presence, the question is whether there is a need for six VCs, particularly in the locations in which they are currently provided.

The rationalisation suggested could include the following:

- Nannup to be a digital touch screen facility[91] with a roving visitor support person during events which could include a volunteer ambassador program. We do note, however, that some areas in the WBAC sub-region have challenges with getting volunteers to run events already and there is a need to ensure volunteers are not overloaded in order to avoid volunteer burnout. We also note that Nannup could develop into a more significant gateway into the WBAC sub-region with the growing level of traffic on the Mowen Road along with the planned Busselton/Margaret River Regional Airport redevelopment.
- As a northern gateway into the region, it is suggested that the Bridgetown Visitor Centre be retained under this model but with a number of improvements required to the current layout, profiling etc. and to act as the conduit for visitor servicing requirements for the Nannup touch screen as well.
- That the co-location activity occurs both in Pemberton and in Northcliffe with a stronger focus on Pemberton to offer visitor services across both Northcliffe and Pemberton. This could include a touch screen facility in Northcliffe which could be supplemented with a volunteer ambassador program, though we note the investment already in the VC, library and art gallery complex.
- Walpole is seen as the southern gateway although we do note, from anecdotal feedback that most visitor traffic heads from north to south from Bridgetown and Manjimup down to Walpole and then into Denmark and Albany before coming up the separate highway outside the WBAC. Walpole, however, does seem to be a stronger leisure/holiday destination than other towns in the WBAC region.
- As proposed, the Manjimup VC will eventually be integrated into the Manjimup Timber and Heritage Park facility and should be part of shared resourcing arrangement through reception services generally. The new museum should offer the potential for upgraded information displays and potential touch screen technology for the supply of visitor information.

8.4.2. Benefits

As one might assume through a rationalisation model, there should be a variety of financial benefits including:

- cost savings, particularly to LGs through the various rationalisation options noted above;
- noting that there is still the retention of two VCs acting as gateway hubs for the region whilst others are supported through digital and touch screen solutions as well as roving volunteer ambassador programs through event periods; and
- the above options could also work with digital touch screen options being located in some of the existing buildings where visitor services are offered but currently on a manned basis.

As we are mindful that the quantum of funding applied to staff related costs is comparatively low (compared to other VCs investigated) within the WBAC region for most VCs, there are a variety of on-costs and supporting costs which are also prevalent. The true cost of providing visitor services is easily seen within Bridgetown-Greenbushes because of the financial information provided by the Shire of Bridgetown-Greenbushes and the application of various overhead costs which capture the true extent of

[91] It would need to be determined whether the current "A Taste of Nannup" would support digital touch screen as it may potentially take away retail space at front of shop.

operating a visitor centre. It is important that LGs recognise the true cost of offering visitor services so that an accurate comparison of their costs and benefits can be determined.

Whilst we note the important role that VCs play within smaller communities, and which provide a face for local activities, it is important that the true cost of providing this is fully factored in. This needs to include the use of buildings provided as there is an opportunity cost for potentially allowing these structures to be used for other purposes. Although the ability to lease space to others might be challenging, there is still an opportunity cost in doing so which needs to be factored in. In addition, there are costs associated with building maintenance which are currently captured by some of the LGs but not passed onto the VCs.

8.5. Financial Summary

The following table provides a summary of the estimated impact on likely revenue and expenditure for VCs generally under the various visitor service models assessed. Importantly, because the existing VCs are operated under very different management, staffing and funding structures, one cannot quantify cost savings or increases with accuracy. This is particularly the case when trying to compare all wage and salary related costs across the various VCs.

Unlike many regions which offer various VCs, the quantum of expenditure required for wages, salaries and related on costs in the WBAC sub-regional overall, is noticeably lower. But to achieve this the salaries being paid to VC personnel appear to also be very low in some circumstances.

However, when one looks at the percentage of expenditure which is applied to wages, salaries and related on costs in the WBAC sub-region, it is not dissimilar to other regions around Australia (where 60% or more of all operating costs relate to all wage and salary related costs).

For this reason, the following table notes (rather than quantifies) the likely impact for each series of income or revenue elements against each of the models. Our assessment is that the recommended Hybrid Model, which combines elements of the centralised servicing model, the co-location model and the digital servicing model, should be able to deliver noticeable operating cost savings against most expenditure items, along with very slight reductions generally for a number of income items though online sales should help offset a number of these slight reductions. The net effect should be a higher net profit achieved after all expenditure items are deducted.

Importantly, the quantum of fee for service charges which LGs contribute to some VCs as an income item to support them should also be able to be reduced under the hybrid model. In turn, this should allow the VCs and/or the entity which eventually runs them, to apply more of the LG's contribution toward digital marketing programs and new promotional initiatives which industry can potentially participate in.

Table 26: Estimated Funding Implications

Consolidated financial categories	Centralised Visitor Servicing Model	LG Co-Location Model	Digital Visitor Servicing Model	Rationalisation Model	Hybrid Recommended model
Income Elements					
Merchandise sales	No change	No change	Change with new online sales	Reduction expected though new online sales	Change with new online sales
Accommodation commissions	Expected to reduce for all VCs as more done online directly	Expected to reduce for all VCs as more done online directly	Expected to reduce for all VCs as more done online directly	Expected to reduce for all VCs as more done online directly	Expected to reduce for all VCs as more done online directly
Bus-coach ticket commissions	No change	No change	Reduction expected	Reduction expected though new online sales	Reduction expected though new online sales

Consolidated financial categories	Centralised Visitor Servicing Model	LG Co-Location Model	Digital Visitor Servicing Model	Rationalisation Model	Hybrid Recommended model
Membership fees	No change	May see slight reduction	May see slight reduction	Reduction expected	May see slight reduction
WOW ticket commissions (Walpole)	No change	No change	Reduction expected	May see slight reduction	May see slight reduction
Grants (LG, regional or State)	No change	No change	No change	No change	No change
Fee for service LG contributions	Should reduce overall	Should reduce overall	Should reduce overall	Should reduce overall	Should reduce overall
Brochure display fees	No change	No change	Reduction with move to web based product marketing	Reduction with move to web based product marketing	May see slight reduction
Expenditure Elements					
Wages and oncosts (salaries, leave, training, super)	Reduction expected as back of house functions centralised	Reduction expected with co-located services and costs	Significant reduction expected	Significant reduction expected	Reduction expected as back of house functions centralised
COGS	No change	No change	Reduction expected	Reduction expected	Reduction expected
Marketing Expenses (website, general marketing, brochures etc.)	Reduction expected as IT and marketing functions centralised	No change	Reduction expected as IT and marketing functions centralised and brought online	Reduction expected as IT and marketing functions centralised and brought online	Reduction expected as IT and marketing functions centralised and brought online
Maintenance (materials etc.)	No change	Reduction expected with co-located services and costs	Reduction expected	Reduction expected	Reduction expected
Utilities (water, electricity, phone, rubbish collection, security)	No change	Reduction expected with co-located services and costs	Significant reduction expected	Significant reduction expected	Reduction expected
Depreciation costs	No change	Reduction expected with co-located services and costs	Significant reduction expected	Significant reduction expected	Reduction expected
LG departmental overheads	Reduction expected as back of house functions centralised	Reduction expected with co-located services and costs	Significant reduction expected	Significant reduction expected	Reduction expected
Building lease costs (opportunity cost)	No change	Reduction expected with co-located services and costs	Significant reduction expected	Significant reduction expected	Reduction expected
Fixtures and fittings	Reduction expected as back of house functions centralised	Reduction expected with co-located services and costs	Significant reduction expected	Significant reduction expected	Reduction expected
IT support, hardware, software	Reduction expected as back of house functions centralised	Reduction expected with co-located services and costs	Increase in expenses	Increase in expenses	Increase in expenses
Accounting, legal, audit fees	Reduction expected as back of house functions centralised	Reduction expected with co-located services and costs	Reduction expected	Reduction expected	Reduction expected

9. THE RECOMMENDED WAY FORWARD

9.1. Recommendations

We make the following recommendations based on a variety of assumptions. In saying so, we appreciate that some assumptions might require further refinement and, therefore, might nullify some options.

- It is assumed that the NBN rollout will occur in the next 1-3 years[92] into the WBAC sub-region offering good internet coverage and the opportunity for a digital platform to deliver visitor services to most of the sub-region. In the interim, there will be a need to encourage those without good connectivity to utilise libraries and CRC which may be able to provide this.
- There is a desire by LGs, as the funding body (in different forms) for VCs to look at ways of collocating visitor services, even if these options have been attempted before but have been unsuccessful.
- Whether an LTO is established or not, the focus of visitor services needs to be on delivering quality information in advance (via a quality website) and within the sub-region, via a variety of visitor facilities, and digital-based solutions; so, a mix of both online and on the ground.
- A model which centralises as many of the back of house support functions and requirements including compliance needs should be part of a new model going forward as it will help with quality control to benefit communities, visitors, industry operators and LGs.
- The simple rationalisation of VCs is unlikely to lead to an improved level of visitor service delivery until such time that digital-based solutions are able to be provided comprehensively across the entire WBAC sub-region, including via technology in the form of touch screens, etc.
- None of the above, however, obviates the benefit of having quality volunteer-based ambassadors, well trained and able to support visitor enquiries, particularly during events and peak holiday periods.

The true cost of visitor services is only able to be determined once all costs (including the opportunity cost of providing Peppercorn rental accommodation) are identified. The assessment we have provided shows, based on our experience elsewhere, an indication of what some of the true cost is likely to be but we have not been provided with full financials for each VC to determine the accurate operating cost of visitor servicing.

9.2. Conclusion

Based on the available information and our assessment of current and future visitor servicing needs, we would suggest that the preferred model which the three LGs and WBAC should now consider is an amalgam of the models recommended. The preferred model would therefore ideally include:

- all back of house functions (accounting, procurement, IT, marketing, HR systems, administrative functions) to be centralised;
- the introduction of a dynamic destination website to replace the 10 existing destination and VC websites across the two sub-regions of Blackwood River Valley and Southern Forests and including the use of touch screen technology introduced in select locations;
- co-location of VCs with other appropriate facilities to share costs and benefits; and

[92] Though we understand this is not guaranteed

- whilst we acknowledge the value to local communities of having a “shop window” to reflect the uniqueness of the towns where VCs are currently located and as an important element of community pride, there needs to be a reassessment of the true ongoing cost of operating each VC once full financial data is provided for each.

  In summary, it is important to note that a percentage of visitors to the WBAC region currently use VCs. Whilst we consider that the actual quantum of visitors into some of the VCs in the region is higher than in other locations as a percentage of total visitation, there is still close to 85% of visitors who do not walk into most VCs in the region. Offering quality reliable information to all visitors is an essential outcome which needs to be aimed for.

10. SUPPORTING DOCUMENTATION

10.1. Supporting Documentation 1 - Bibliography

10.2. Supporting Documentation 2 – Visitor Information Services Consumer Research

10.3. Supporting Documentation 3 - Full Product Audit

10.1. Supporting Documentation 1 - Bibliography

Table 27: Bibliography

Author	Name	Year
-	Extraordinary Experiences in the south-west of Western Australia	-
A Taste of Nannup	A Taste of Nannup and Beyond	-
Andimaps	Walpole Street Guide 2016-17	2016-17
australiassouthwest.com	Australia's South West Holiday Planner 2016/17	2016/17
australiassouthwest.com	Your South West Holiday	-
Blackwood Valley Brewing Company	The Cidery	-
Blooming Wild Festival	Blooming Wild Festival	2016
Bridgetown-Greenbushes Visitor Information Centre	Bridgetown-Greenbushes Simply Beautiful	-
Denmark Dinosaur World	Denmark Dinosaur World	-
Department of Parks and Wildlife	Valley of the Giants Tree Top Walk	-
Department of Parks and Wildlife	Walpole Wilderness Discovery Centre	-
Department of Transport	Alcohol Interlock Scheme	2016
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Hidden River Estate Winery & Restaurant	Hidden River Estate Winery & Restaurant	-
Lyster Orchards Manjimup	Lyster Orchards Manjimup	-
Nannup	Mowen Rd Traffic Count 7 days Average	2014
Pemberton Discovery Tours	WA Wilderness	-
Pemberton Wine Region	Wine & Food Map	-
Shire of Bridgetown-Greenbushes	2011 Top Tourism Town Award Entry - Bridgetown	2011
Shire of Bridgetown-Greenbushes	2015-2016 Membership Categories for Shire Invoices	-
Shire of Bridgetown-Greenbushes	Bridgetown-Greenbushes Visitor Centre Membership Policy	2010
Shire of Bridgetown-Greenbushes	Visitor Centre Budget 2014-2015	2014-2015
Shire of Bridgetown-Greenbushes	Visitor Centre Budget 2015-2016	2015-16
Shire of Bridgetown-Greenbushes	Visitor Centre Budget 2016-2017	2016-17
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Shire of Bridgetown-Greenbushes	Visitor Centre Service review	Oct-15
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Shire of Manjimup	Final Concept Report: Manjimup Recreation Plaza	Sep-16
Shire of Manjimup	Manjimup Timber & Heritage Park	-
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Shire of Manjimup	Nature Based Camping Ground Information	2016/17
Shire of Nannup	Immerse Yourself in Nature	-
South West Development Commission	Heritage Tourism	May 3-4, 2012
Southern Forests	Southern Forests Visitor Guide - 2016 Booking Form	2016
Southern Forests Food Council Inc.	Southern Forests Seasonal Produce Guide	-
southernforests.com.au	Explore the Southern Forests Western Australia	-
southernforests.com.au	Southern Forests Map & Guide	-

Author	Name	Year
Tales of the Trail Western Ranch	Horse Riding Adventures	-
The Pemberton Trailway Co.	Forest Encounters by Tram	-
The Wine & Truffle Co	The Wine & Truffle Co	-
Tourism Council WA	The Western Australia Tourism Work Atlas	2014-15
Tourism Research Australia	The Influence of Western Australian Visitor Centres on Tourist Behaviour: Summary	Sep-15
Tourism Western Australia	A Sustainable future for visitor centres in Western Australia: Tourism WA response to the Haberlin Consulting study	2014
Tourism Western Australia	Australia's South West: Overnight Visitor Fact Sheet	2014/2015
Tourism Western Australia	Australia's South West: Overnight Visitor Fact Sheet	13/12/2011
Tourism Western Australia	Fast Facts Year Ending December 2015	Mar-16
Warren Blackwood Alliance of Councils	2016 WBAC LTO Project	2016
Warren Blackwood Alliance of Councils	A Sustainable LTO Tourism Model for the Warren Blackwood Alliance: Investigation Report Summary, September 2016	Sep-16
Warren Blackwood Alliance of Councils	Investigation Report: A Sustainable LTO Tourism Model for the Warren Blackwood Alliance July 2016 Draft 3	Jul-16
Warren Blackwood Alliance of Councils	Strategic Plan 2016-2019	-
www.PembertonWA.com	Free Pemberton Map	-

10.2. Supporting Documentation 2 – Visitor Information Services Consumer Research

10.2.1. Visitor Information Services Consumer Research

The following are the key findings from the consumer survey for the Sunshine Coast. The survey sample was 510. The findings support the trend which notes that individuals are increasingly utilising online services as a means of gathering information prior to visiting a destination.

10.2.2. Demographics

Respondents were asked which age group they fell into with results showing:

AGE/GENDER	PERCENTAGE
18-24	6.7
25-34	25.5
35-44	22.4
45-54	23.9
55-65	21.6
Male	46.1
Female	53.9

10.2.3. International New Zealand visitors

In consultation with Council, it was agreed that the cost of trying to get a representative sample of international visitors from a number of source markets (UK, USA, Europe, Asia, etc.) was prohibitively expensive. However, as a high percentage of visitors are actually from New Zealand it was agreed that the consumer survey would extend to cover a representative sample of New Zealand visitors to Sunshine Coast.

72 New Zealanders were sampled with the majority coming from:

LOCATION	PERCENTAGE
Auckland	43.1
Canterbury	19.4
Otago	8.3
Bay of Plenty	6.9
Wellington	5.6

The geographic spread is highly representative of the New Zealand visitor mix to the Sunshine Coast.

10.2.4. Last visit to the Sunshine Coast

Most of those surveyed had visited the Sunshine Coast relatively recently. The overall results indicate:

LAST VISIT	PERCENTAGE
< 3 months	35.1
3-6 months	18.0
6-12 months	19.2
12-18 months	13.9
18-24 months	13.7

The Group believes this is an important factor noting that most people surveyed would have a recent experience in accessing visitor information services on the Sunshine Coast (nearly 75% over the last 12 month period).

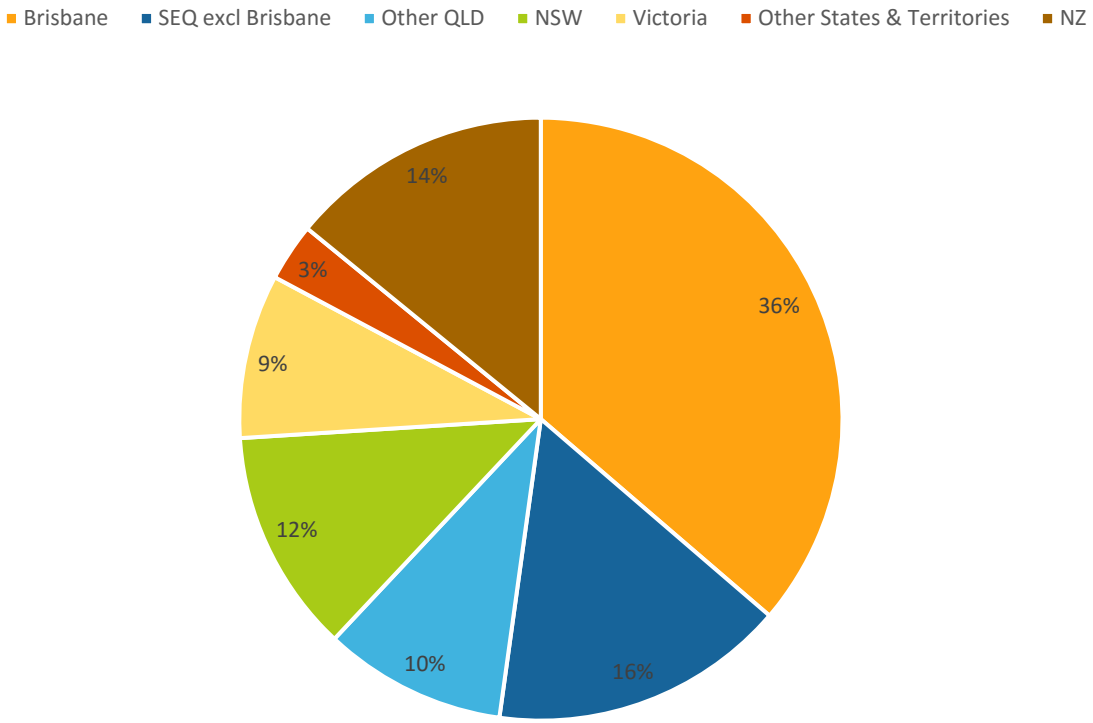
For those driving through the region as opposed to staying overnight, 58% visited in the last 6 months and a further 27% over the last 12-18 month period. By comparison, those staying overnight mirrored the overall percentages referred to above.

10.2.5. Visitor spread

At Council's request, the market research sample mirrored the visitation profile to the Sunshine Coast. As such, the survey sample was as follows:

LOCATION	PERCENTAGE
Brisbane	36.3
South East Queensland (ex. Brisbane)	15.9
Queensland (other)	9.8
New South Wales	12
Victoria	8.8
Other States/Territories	3.1
New Zealand	14.1

Figure 29: Visitor Spread

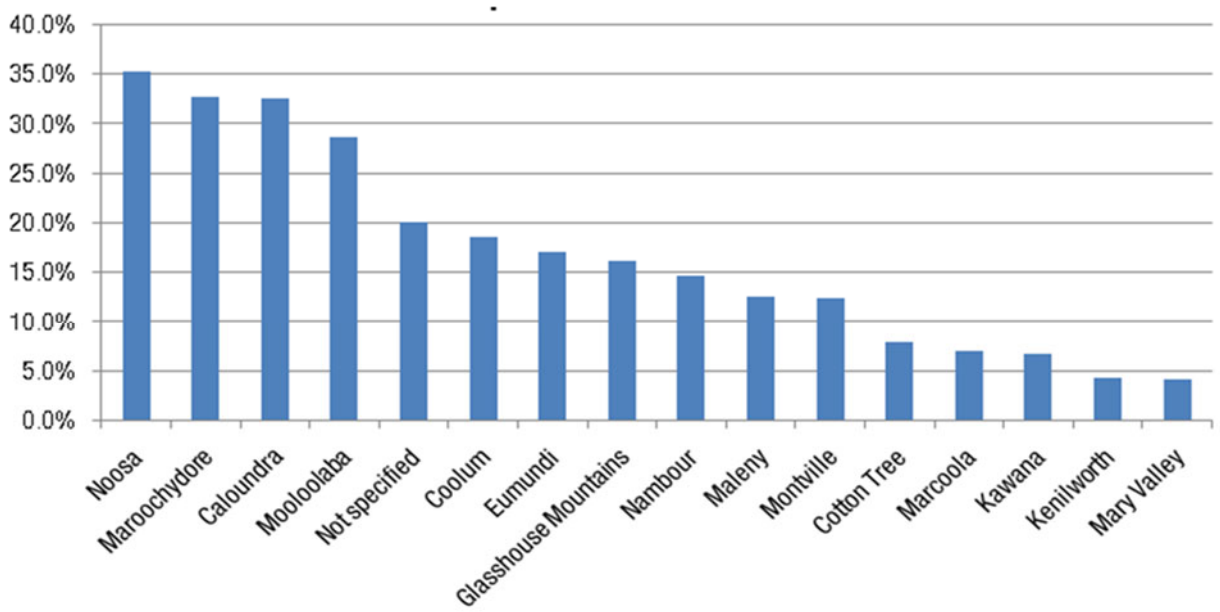


10.2.6. Sunshine Coast Visitors' Locations

Those surveyed were asked where they had specifically visited on the Sunshine Coast with results showing the following:

LOCATION	PERCENTAGE	LOCATION	PERCENTAGE
Caloundra	32.5	Cotton Tree	7.8
Kawana	6.7	Montville	12.4
Mooloolaba	28.6	Maleny	12.5
Maroochydore	32.7	Kenilworth	4.3
Coolum	18.4	Mary Valley	4.1
Marcoola	6.9	Noosa	35.3
Nambour	14.7	Eumundi	17.1
Glasshouse Mountains	16.1	Other (non-Sunshine Coast)	20.0

Figure 30: Specific Locations Visited



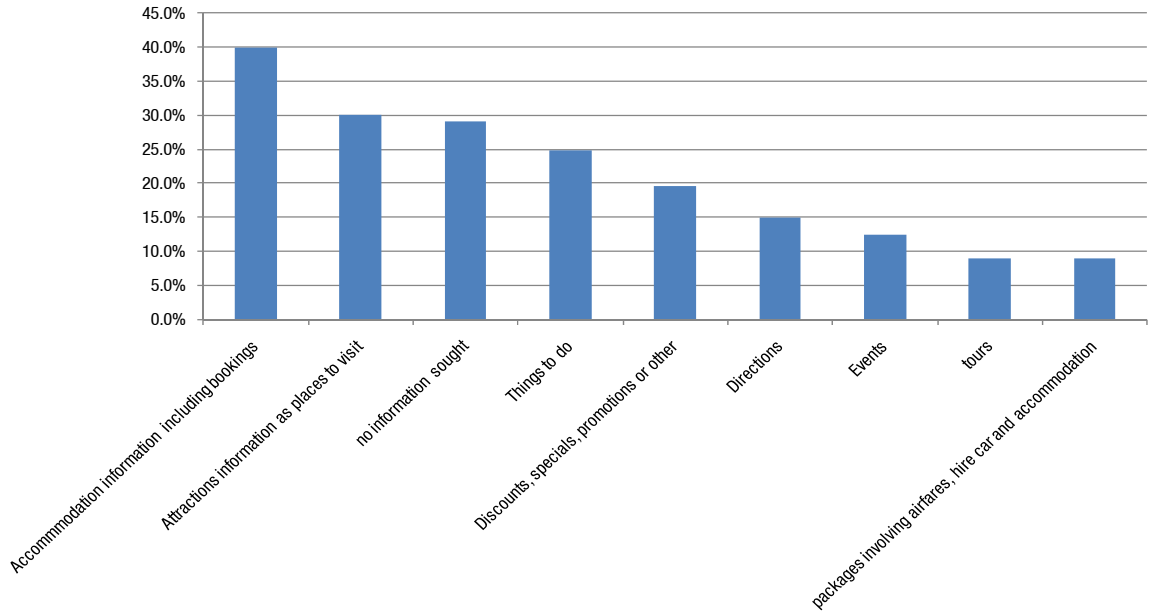
10.2.7. Type of Information Needs Pre Sunshine Coast Visit

The type of information, which survey respondents wanted to gather prior to visiting the Sunshine Coast, was as follows:

INFORMATION TYPE	PERCENTAGE
Accommodation (including bookings)	40.0
Attractions (natural or man-made) as places to visit	30.0
Things to do (indoor/outdoor)	24.9
Discounts, specials, promotions or other forms of offer	19.6
How to get to the Sunshine Coast and transport to other locations	14.9
Events	12.5
Tours	9.0
Packages involving airfares, hire cars and accommodation	9.0
Did not seek information prior to Sunshine Coast visit	29.0
Overnight accommodation in Sunshine Coast	49.7

INFORMATION TYPE	PERCENTAGE
Attractions in Sunshine Coast	33.0
Things to do in Sunshine Coast (indoor/outdoor)	27.9

Figure 31: Information Sought Prior to Visiting



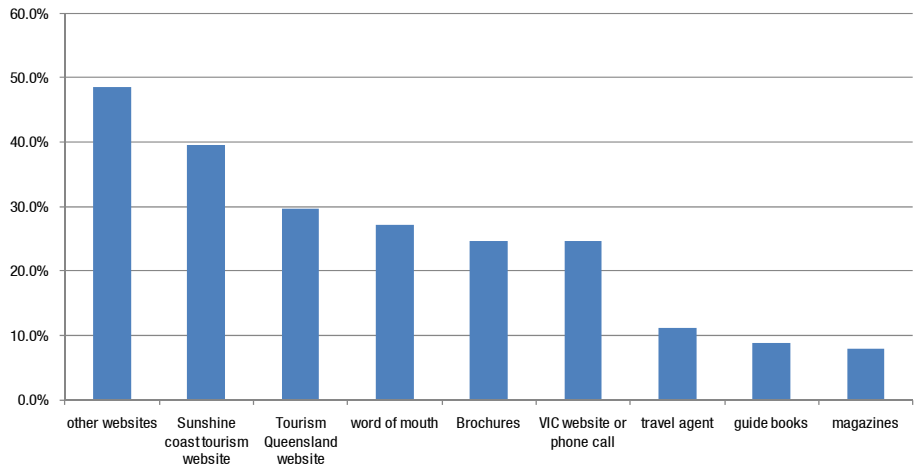
10.2.8. Sources of Information Pre Sunshine Coast Visit

Respondents indicated that a number of sources were accessed which The Group believes highlights the importance of digital and web based marketing both currently and for the future. The results indicate as follows:

SOURCE	PERCENTAGE
Brochures	24.6
Guidebooks	8.9
Travel agent	11.2
Travel magazines	8.0
VIC website/phone enquiry	24.6
Sunshine Coast tourism websites	39.6
Tourism Queensland website	29.7
Other websites	48.6
Word of mouth	27.2

The Group believes that the high percentage of visitors who used various forms of non-RTO or TQ websites were probably searching for accommodation information from specific properties or even some of the major visitor attractions with respect to things to do. Importantly, we believe the results highlight what has been a growing trend over the last 10 years reflecting the diminishing role of travel agents which are now being substituted by online booking services and a variety of search engines.

Figure 32: Information Sources Prior to Visiting



10.2.9. Most Useful Sources of Information Prior to Sunshine Coast Visit

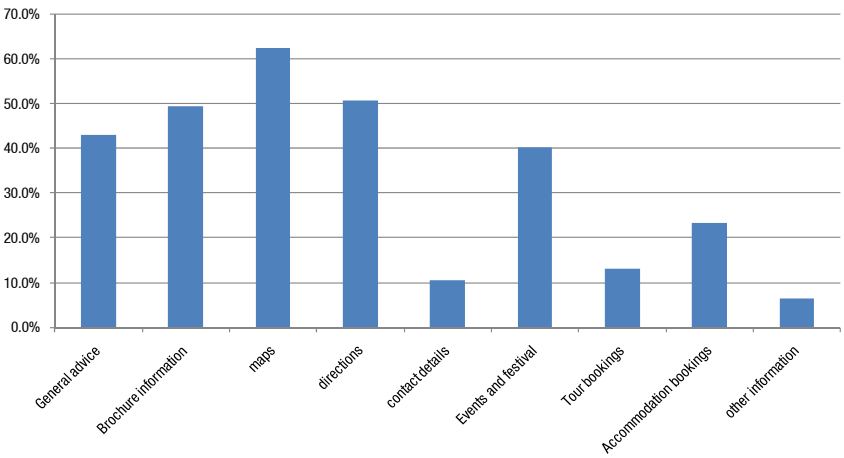
Respondents were asked to rank in descending order the usefulness of the various sources with one being the most useful and eleven being the least useful source of information. The results indicate the following:

SOURCE	RANKING	SOURCE	RANKING
Brochures	5	Sunshine Coast tourism websites	3.4
Guidebooks	6	Tourism Queensland website	4.1
Travel agents	6.7	Other websites	4.8
Travel magazines	6.4	Word of mouth	5.7
VIC website/phone enquiry	4.9		

10.2.10. Type of Service Obtained Prior to Visit via Phone/Web/VIC[93]

Respondents who contacted a visitor information centre prior to visiting the Sunshine Coast indicated that they gathered the following information:

Figure 33: Information Service Obtained Over the Phone or Via the Web from a VIC



[93] VIC = Visitor Information Centre

Respondents were asked how useful they found the informational services gathered from a visitor information centre prior to visiting the Sunshine Coast. The responses indicated:

USEFULNESS	PERCENTAGE
Very useful	62.3
Somewhat useful	35.1
Not useful	2.6

10.2.11. During the Visit to the Sunshine Coast

Respondents were then asked a variety of questions to indicate the types of visitor information which they gathered during their actual visit to the Sunshine Coast or if driving through during their period specifically within the region.

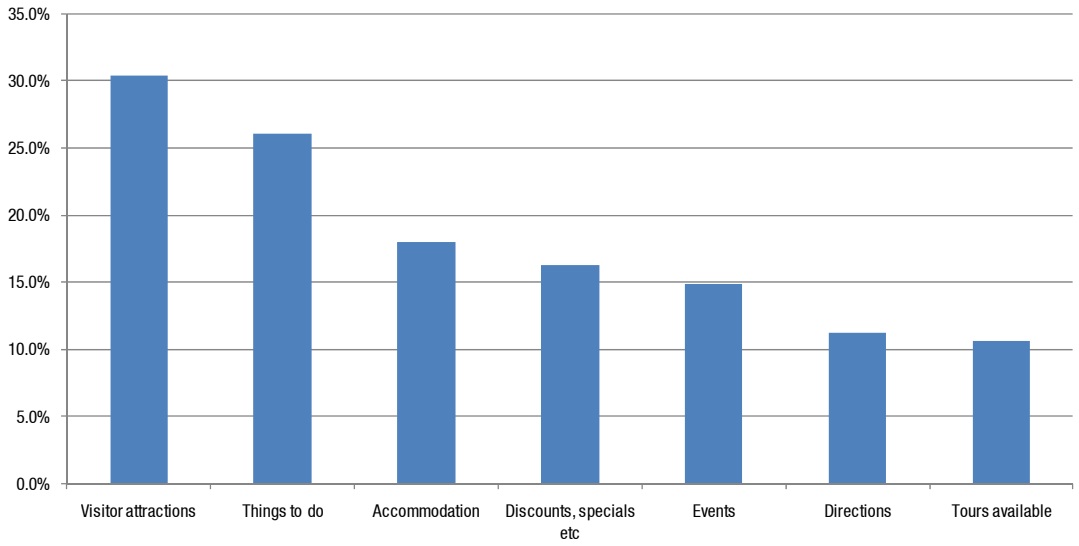
Primary information Sought from VICs during Visit

The results indicate the following as the primary information sought:

INFORMATION TYPE	PERCENTAGE
Visitor attractions	30.4
Things to do	26.1
Accommodation options	18.0
Events	14.9
Discounts, specials, promotions and offers available	16.3
General transportation information and directions	11.2
Available tours	10.6

Consumers seem to be using VICs particularly for information on visitor attractions they can take their family/friends to as well as various things to do in the region.

Figure 34: Primary Information Sought from VICs

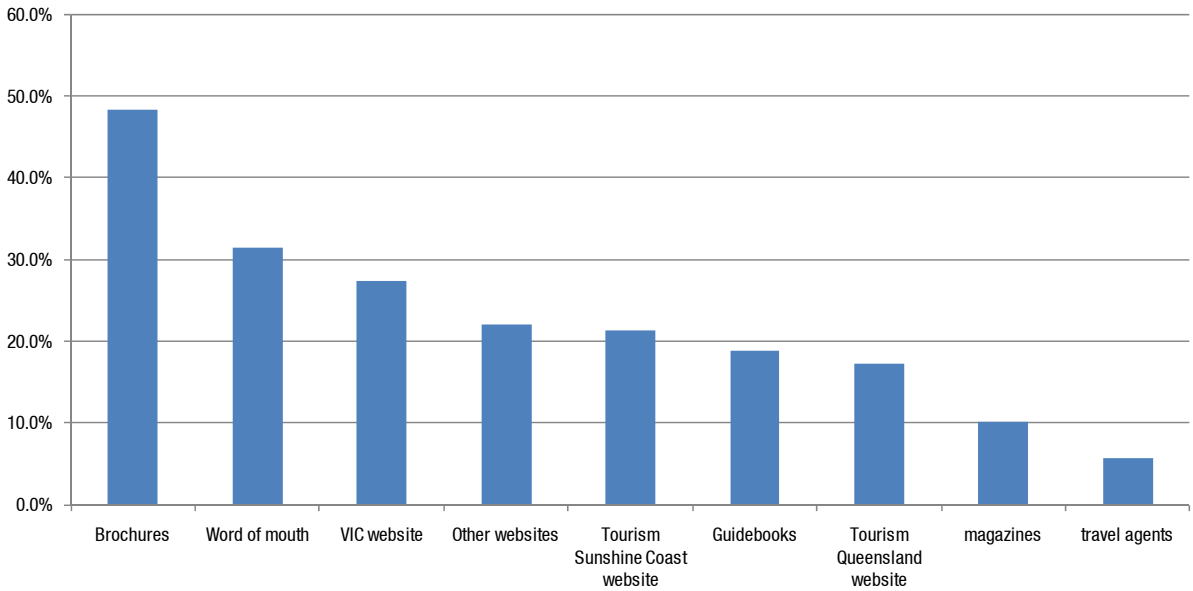


10.2.12. Sources of Information Used during their Stay or Visit to the Sunshine Coast

The following are the primary sources of information identified by respondents:

SOURCE	PERCENTAGE	SOURCE	PERCENTAGE
Brochures	48.4	Other websites	22.0
Word of mouth	31.4	Guidebooks	18.8
VIC website	27.4	Travel magazines	10.1
Tourism Sunshine Coast website	21.3	Travel agents	5.8
Tourism Queensland website	17.3		

The results indicate the maintained value of brochures which people collect from a variety of sources including online, in hotel foyers, in VICs and other locations. Furthermore, the importance of websites can't be emphasised strongly enough with many indicating that they gathered information from VIC websites or other tourism websites within the Sunshine Coast whilst in the region.



10.2.13. Most useful sources of information during their visit to the Sunshine Coast

The results indicate the following (5 being most useful, 1 being least useful).

SOURCE	RATING
Websites	5
Brochures	4
Word of mouth	4
Guidebooks	3
Travel magazines	2
Travel agents	2

The Group considers that the higher ranking provided by sources such as the various websites available highlights two important factors being:

- The growing use of the web for planning and booking as well as gathering information; and
- The acknowledgement that people are accessing a number of websites including VIC websites whilst they are in the Sunshine Coast as opposed to prior to visiting.

10.2.14. Locating the VIC

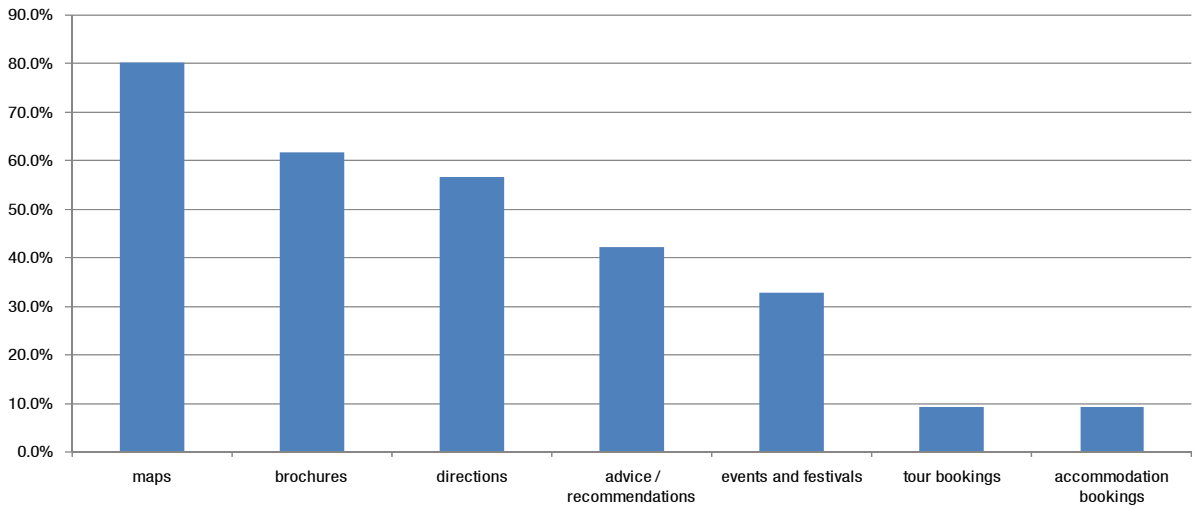
The results indicated that for most VICs they are easy to locate while noting that the numbers of people who actually visited the VICs is proportionately low compared to those who visited the VICs via their websites or who phoned in for information. This raises an important issue of whether it is more cost effective to ensure that a highly effective interlinked group of websites and a call centre for phone enquiries is a better way of offering information services to visitors in future compared to having the structure of information centres staffed by either permanent or casual paid personnel or volunteers.

10.2.15. Information Obtained at a VIC Whilst in the Region

The type of information visitors obtained from VICs whilst in the region included the following.

INFORMATION TYPE	PERCENTAGE
Maps	80.3
Brochures	61.8
Advice/Recommendations	42.1
Directions	56.6
Events/Festivals	32.9
Tour booking	9.2
Accommodation booking	9.2

Figure 35: Information Obtained at a VIC During Visit



Our interpretation of the results reflects the importance of VICs for providing maps to visitors in particular as well as being a source for brochures and general advice. We also note the number of people who visit a VIC for directions. Importantly, a much lower percentage of visitors to a VIC are actually booking accommodation through the VIC or booking tours unless this is being done through the website or over the phone.

Respondents were asked how useful they found the information gathered from the VIC which they visited. 63.2% of those who had visited a VIC indicated that the information they gathered was very useful, 35.5% indicated it was somewhat useful and 1.3% indicated it was not useful.

10.2.16. Likelihood of Reuse VIC

This question was asked of respondents to try and help ascertain whether they would logically seek information from a VIC in the future. The question deliberately doesn't differentiate whether they would gather the information via the VICs website, via a phone enquiry or whether they would visit in person.

The results indicate the following:

LIKELIHOOD	PERCENTAGE
Very likely	27.3
Likely	42.2
Not likely	22.4
Would not reuse VIC	2.5

The Group's interpretation of this question indicates the need for a change in the way information services are offered for the future. The results indicate approximately 1 in 4 respondents were only very likely to seek information from a VIC in the future and we believe that any response less than that (likely, not likely or not at all) indicates a neutral to negative response. This is particularly important as the question does not differentiate information which visitors may get from a VIC website as opposed to visiting in person. It also raises the important question of whether the infrastructure which currently exists within the Sunshine Coast region and which comes at some cost is warranted in the longer term when the response from this question indicates that most respondents were at best ambivalent and at worst unlikely to seek information from a Visitor Information Centre in the future.

We believe the response to this question also highlights:

- The growth and online bookings for accommodation, tours, festival and event activities etc.;
- The growing sophistication of web-based search engines and websites which are able to be provided by individual properties as well as by regional tourism and local tourism organisations; and
- The extensive use of pre-holiday planning in particular done by visitors and which is primarily based on web searches to gather and digest the relevant information before deciding whether to book directly with an accommodation provider as well as organising tour and attraction add-ons.

Respondents were asked whether they had visited a VIC elsewhere nationally or internationally over the last two years which they found particularly impressive

65.5% of respondents indicated they had not visited another VIC which they had found particularly impressive over the last 2 years. This question was asked to identify other models or facilities which may be useful to benchmark VIC services in particular from.

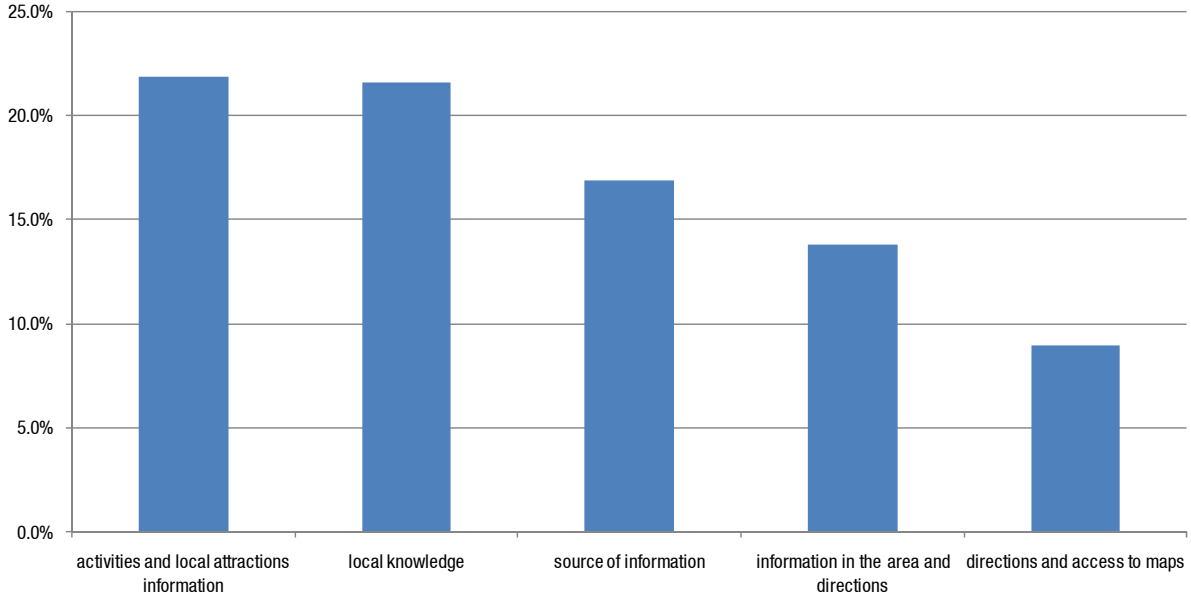
10.2.16.1. Reasons why respondents would visit a VIC in the future

Of those respondents who indicated they would visit a VIC in the future, the main reasons for doing so were given as follows:

REASON	PERCENTAGE
Gather information on activities and local attractions	21.9
Gather local knowledge	21.6
Great source of information	16.9
Gather information on the area and directions	13.8
Get directions and access to maps	9.0

The Group's interpretation of these responses indicates for those who are loyal users of VICs they see value in the quality of the local knowledge and information which staff and volunteers are able to provide to them.

Figure 36: Reasons to Visit a VIC in the Future



10.2.16.2. Reasons Given for Not Wanting to Visit a VIC in the Future

Respondents were also asked why they wouldn't visit a VIC in the future with primary reasons being:

REASON	PERCENTAGE
Belief they already had good knowledge of the area	17.3
Get information required from the internet	22.0
Locations of VICs are inconvenient	7.1
Lived locally and already knew the area intimately	7.1
Gathered information required from family/friends	9.4
Prefer to plan ahead and gather information in advance	6.3
Could source the information required elsewhere	5.5

The Group considers that the responses to this question highlight the growth in alternatives to VICs as sources of information.

10.2.17. Other Services or Information

The question was posed whether there were other services or information that respondents wanted to see a Visitor Information Centre offer, but were not offered currently.

The services or information which users of VICs would like to see in the future but they could not find during their current visit include the following:

- Access to discount vouchers, promotional offers, special deals;
- Restaurant and dining out guides;
- Internet facilities on site; and
- Discount accommodation options.

The responses to this question highlight that for many respondents unless a VIC is able to provide a cheaper rate for accommodation or for tours or attractions the need to access them compared to alternative sources of information is limited.

10.2.18. Other VICs Which Stood Out

In response to the earlier question about whether respondents had come across a Visitor Information Centre which did stand out, the following reasons were provided.

STANDS OUT	PERCENTAGE
Helpful staff	22.3
Friendly staff	17.7
Well informed staff - knowledge	12.6
Wide range of information	14.3
Good location on a main road	10.9
All information requirements were met	12.6

Though the survey was for visitor services on the Sunshine Coast, the findings offer valuable insight into the future needs of visitors generally and the sources where they access visitor information before visiting the destination and when they are there.

10.3. Supporting Documentation 3 - Full Product Audit

10.3.1. Accommodation Audit

Table 28: Full Accommodation Audit

Name	LGA	Type	Number of Rooms/Units	Number of Sites	Official Rating
Ascot House	Bridgetown-Greenbushes	Guest House	1	-	-
Atina Rocks Country Homestead	Bridgetown-Greenbushes	Guest House	-	-	-
Belvedere B&B	Bridgetown-Greenbushes	B&B	-	-	-
BlueSky Retreat	Bridgetown-Greenbushes	Cottage	1	-	-
Bramley Lodge	Bridgetown-Greenbushes	Cabin/Lodge	2	-	-
Bridgetown Caravan Park	Bridgetown-Greenbushes	Caravan Park	9	80	-
Bridgetown Hotel	Bridgetown-Greenbushes	Hotel	9	-	-
Bridgetown House	Bridgetown-Greenbushes	Guest House	-	-	-
Bridgetown Riverside Chalets	Bridgetown-Greenbushes	Cabin/Lodge	8	-	-
Bridgetown Valley Lodge	Bridgetown-Greenbushes	Cabin/Lodge	8	-	4
Cooinda Cottage	Bridgetown-Greenbushes	Cottage	1	-	-
Country Cottages of Bridgetown	Bridgetown-Greenbushes	Cottage	4	-	-
Exchange Hotel	Bridgetown-Greenbushes	Hotel	24	-	-
Ford House Retreat	Bridgetown-Greenbushes	Guest House	9	-	4.5
Forestview Farmstay	Bridgetown-Greenbushes	B&B	-	-	-
Freemasons Hotel	Bridgetown-Greenbushes	Hotel	22	-	-
Glenlynn Cottages	Bridgetown-Greenbushes	Cottage	4	-	-
Hilltop Hideaway	Bridgetown-Greenbushes	Guest House	1	-	-
Leda Lodge	Bridgetown-Greenbushes	Cabin/Lodge	-	-	-
Lucieville Farm Chalets	Bridgetown-Greenbushes	Cabin/Lodge	7	-	-
Maranup Ford Caravan Park	Bridgetown-Greenbushes	Caravan Park	-	-	-
Moyola Manor Guest House	Bridgetown-Greenbushes	Guest House	3	-	-
Nelsons of Bridgetown	Bridgetown-Greenbushes	Motel	40	-	3.5
Oak Tree Barn Bridgetown	Bridgetown-Greenbushes	Cabin/Lodge	1	-	-
Pamela's Retreat	Bridgetown-Greenbushes	Guest House	4	-	3.5
Redtail Cottages	Bridgetown-Greenbushes	Cottage	4	-	-
Remy's Retreat	Bridgetown-Greenbushes	Guest House	-	-	-
Rezanci II	Bridgetown-Greenbushes	Guest House	1	-	-
Rickaty on Blackwood	Bridgetown-Greenbushes	Cabin/Lodge	2	-	-
Shambhala Guesthouse	Bridgetown-Greenbushes	B&B	4	-	3.5
Sunnyhurst Chalets	Bridgetown-Greenbushes	Guest House	5	-	-
The Green Welly Stop	Bridgetown-Greenbushes	B&B	2	-	3.5
The Shed on Blackwood	Bridgetown-Greenbushes	Guest House	1	-	-
The Treetop Riverview	Bridgetown-Greenbushes	Guest House	1	-	-
Tweed Cottage	Bridgetown-Greenbushes	Cottage	1	-	-
Tweed Valley Lodge	Bridgetown-Greenbushes	Motel	8	-	4
Windy Hollow Homestead & Treehouse	Bridgetown-Greenbushes	B&B	-	-	-
Woodlands of Bridgetown B&B	Bridgetown-Greenbushes	B&B	2	-	-
Wren's Hollow	Bridgetown-Greenbushes	Guest House	1	-	-
Annie Domek B&B	Manjimup	B&B	-	-	-

Name	LGA	Type	Number of Rooms/Units	Number of Sites	Official Rating
Aroundtu It Caravan Park	Manjimup	Caravan Park	3	24	-
Bayside Villas	Manjimup	Holiday Home	6	-	-
Beedelup House Cottages	Manjimup	Cottage	7	-	4
Bella Vista B&B	Manjimup	B&B	-	-	-
Best Western Pemberton Hotel	Manjimup	Hotel	30	-	3.5
Big Brook Cottages	Manjimup	Cottage	8	-	4
Billa Farm Cottages	Manjimup	Cottage	4	-	-
Blue Wren Retreat	Manjimup	Guest House	3	-	-
Camelia Cottage	Manjimup	Cottage	-	-	-
Canterbury Cottage Northcliffe	Manjimup	Cottage	1	-	3.5
Caringal in the Karri Cottage	Manjimup	Cottage	1	-	-
Che Sara Chalets	Manjimup	Cabin/Lodge	3	-	-
Clover Cottage Country Retreat	Manjimup	Cottage	4	-	3.5
Coalmine Beach Holiday Park	Manjimup	Caravan Park	11	52	-
Cottage 21	Manjimup	Cottage	1	-	-
Crystal Springs Homestead	Manjimup	Guest House	2	-	-
Diamond Forest Cottages	Manjimup	Cottage	4	-	4
Dingup House B&B	Manjimup	B&B	4	-	-
Donnelly Lakes Chalets	Manjimup	Cottage	11	-	-
Eucalyptus House	Manjimup	Cabin/Lodge	1	-	-
Fonty's Pool Caravan Park	Manjimup	Caravan Park	8	36	-
Forest Lodge Resort	Manjimup	Hotel	13	-	3.5
Gilvonnies Farmstay	Manjimup	Guest House	-	-	-
Gloucester Motel	Manjimup	Motel	51	-	3
Houseboat Holidays	Manjimup	Houseboat	1	-	-
Jennys Lake B&B	Manjimup	B&B	1	-	-
Kangaroo Creek Chalets	Manjimup	Cabin/Lodge	2	-	-
Karri Forest Motel	Manjimup	Motel	26	-	3.5
Karri Rose B&B	Manjimup	B&B	3	-	-
Karri Valley Chalets	Manjimup	Cabin/Lodge	4	-	4
Karri Valley Resort	Manjimup	Cabin/Lodge	62	-	3.5
Kingsley Motel & Restaurant	Manjimup	Motel	30	-	3
Lakeside Garden Retreat	Manjimup	Guest House	1	-	-
Latham House	Manjimup	Guest House	-	-	-
Manjimup Central Caravan Park	Manjimup	Caravan Park	8	30	-
Manjimup Gateway Hotel	Manjimup	Hotel	27	-	3
Manjimup Backpackers	Manjimup	Backpackers	-	-	-
Manjimup Hotel	Manjimup	Motel	-	-	-
Manjimup Motor Inn	Manjimup	Motel	56	-	3
Marima Cottages	Manjimup	Serviced Apartments	4	-	4
Marri House	Manjimup	Guest House	1	-	-
Milesend Cottage	Manjimup	Cottage	1	-	-
Miralee Cottage	Manjimup	Cottage	-	-	-
Northcliffe Hotel & Motor Inn	Manjimup	Motel	3	-	-

Name	LGA	Type	Number of Rooms/Units	Number of Sites	Official Rating
One Tree Bridge Chalets	Manjimup	Cabin/Lodge	-	-	-
Pemberton Backpackers	Manjimup	Backpackers	-	-	-
Pemberton Camp School	Manjimup	Cabin/Lodge	-	-	-
Pemberton Caravan Park	Manjimup	Caravan Park	32	100	-
Pemberton Farm Chalets	Manjimup	Cabin/Lodge	8	-	3
Pemberton Lavender and Berry Farm	Manjimup	Cottage	4	-	3
Pemberton Old Picture Theatre Holiday Apartments	Manjimup	Serviced Apartments	5	-	4
Petit Valley Estate	Manjimup	Guest House	1	-	-
Pump Hill Farm Cottages	Manjimup	Cottage	13	-	-
Quinninup Caravan Park	Manjimup	Caravan Park	-	-	-
Rainbow Trail Cottages	Manjimup	Cottage	4	-	4
Rest Point Holiday Village	Manjimup	Cabin/Lodge	19	-	-
Riverside Retreat Chalets	Manjimup	Cabin/Lodge	6	-	-
Riverway Chalets	Manjimup	Cabin/Lodge	5	-	3.5
Round-to-it Northcliffe Caravan Park	Manjimup	Caravan Park	-	-	-
Scarlet Woods Chalets	Manjimup	Cabin/Lodge	4	-	4
Sid's Campground	Manjimup	Caravan Park	0	10	-
The Log Cabin	Manjimup	B&B	1	-	-
The Manji Hostel	Manjimup	Backpackers	-	-	-
The Whitehouse	Manjimup	Guest House	1	-	-
Tingle All Over Budget Accommodation	Manjimup	Backpackers	11	-	-
Tinglewood Cabins	Manjimup	Cabin/Lodge	4	-	-
Tobacco Park Backpackers	Manjimup	Backpackers	-	-	-
Tree Top Walk Motel	Manjimup	Motel	35	-	4
Treenbrook Cottages	Manjimup	Serviced Apartments	4	-	4
Treenridge Estate	Manjimup	Cottage	3	-	-
Vintners House & Cottage	Manjimup	Cottage	2	-	-
WA Wilderness Glamping	Manjimup	Glamping	-	-	-
Walpole Cottage	Manjimup	Cottage	1	-	-
Walpole Hotel Motel	Manjimup	Motel	30	-	-
Walpole House	Manjimup	Cabin/Lodge	1	-	-
Walpole Lodge	Manjimup	Cabin/Lodge	12	-	3
Walpole Rest Point Caravan Park	Manjimup	Caravan Park	17	106	-
Walpole Wilderness Resort	Manjimup	Cabin/Lodge	4	-	4
Warren River Cottages	Manjimup	Cottage	-	-	-
Warren River Resort	Manjimup	Cottage	25	-	-
Warren Way Caravan Park	Manjimup	Caravan Park	4	45	-
Watermark Kilns	Manjimup	Guest House	4	-	-
Windy Harbour Camping	Manjimup	Camping	33	-	-
Woodbine Chalets	Manjimup	Cabin/Lodge	3	-	-
Woodgate Bush Retreat	Manjimup	Cottage	1	-	-
Alice Cottage	Nannup	Cottage	-	-	-

Name	LGA	Type	Number of Rooms/Units	Number of Sites	Official Rating
Barrabup Sanctuary BirdHide	Nannup	Cabin/Lodge	1	-	-
Beyonderup Falls Adult Retreat	Nannup	Cottage	4	-	-
Blackwood Banks Chalets	Nannup	Cottage	-	-	-
Cambray Cottages	Nannup	Cottage	-	-	-
Crabapple Lane	Nannup	B&B	3	-	4
Donnelly River Holiday Village	Nannup	Cottage	36	-	-
Fern Gulley Retreat	Nannup	Cottage	4	-	-
Higgins House	Nannup	Cottage	1	-	-
Holberry House	Nannup	Guest House	6	-	4
Illyarrie	Nannup	Cottage	1	-	-
Jarrah Glen Cabin	Nannup	Cottage	-	-	-
Lewana Cottages	Nannup	Cottage	6	-	-
Loose Goose Chalets	Nannup	Cottage	3	-	-
Marri Wood Cottage	Nannup	Cottage	1	-	-
Mossbrook Country Estate Bed & Breakfast	Nannup	B&B	3	-	4.5
Nannup Bush Retreat	Nannup	Cabin/Lodge	1	-	-
Nannup Caravan Park	Nannup	Caravan Park	3	100	-
Nannup Hideaway Cottages	Nannup	Cottage	4	-	-
Nannup Hotel	Nannup	Hotel	20	-	-
Nannup River Cottages	Nannup	Cottage	1	-	-
Nannup Riverview Cottage	Nannup	Cottage	1	-	-
Nannup Valley Chalets	Nannup	Serviced Apartments	8	-	3
Nashies Cottage	Nannup	Cottage	-	-	-
Redgum Hill Country Retreat	Nannup	Cottage	4	-	-
Riverwood Retreat	Nannup	B&B	2	-	-
Tathra Hilltop Retreat	Nannup	Cottage	2	-	-
The Black Cockatoo Nannup	Nannup	Cottage	6	-	3
The Blue House	Nannup	B&B	3	-	-
The Trees	Nannup	Cottage	-	-	-
Tiger Cottages	Nannup	Cottage	3	-	-
Tree Frog Cottages	Nannup	Cottage	1	-	-
White Gate Cottage	Nannup	Cottage	-	-	-
Willerin	Nannup	Cottage	1	-	-

10.3.2. Attractions Audit

Table 29: Full Attractions Audit

Name	LGA	Type
Blackwood River Park	Bridgetown-Greenbushes	Nature/Recreation
Bridgedale	Bridgetown-Greenbushes	Museum/Historical
Bridgetown Pottery Tearooms & Gallery	Bridgetown-Greenbushes	Art/Gallery
Brierley Jigsaw Gallery	Bridgetown-Greenbushes	Art/Gallery
Fat Arts	Bridgetown-Greenbushes	Art/Gallery
Greenbushes Discovery Centre	Bridgetown-Greenbushes	Museum/Historical
Greenbushes Heritage Amble	Bridgetown-Greenbushes	Museum/Historical

Name	LGA	Type
Greenbushes Mine Lookout	Bridgetown-Greenbushes	Nature/Recreation
Greenbushes Mining Heritage Walk	Bridgetown-Greenbushes	Nature/Recreation
Greenbushes Pool	Bridgetown-Greenbushes	Nature/Recreation
Levanda Grove	Bridgetown-Greenbushes	Farm
Lucieville Farm	Bridgetown-Greenbushes	Farm
Ooh la Lollipop	Bridgetown-Greenbushes	Specialty Store
Santa's Secret Toy Store	Bridgetown-Greenbushes	Specialty Store
Shedleys Wines	Bridgetown-Greenbushes	Winery/Cidery/Brewery
Sunnyhurst Wines	Bridgetown-Greenbushes	Winery/Cidery/Brewery
Suttons Lookout	Bridgetown-Greenbushes	Nature/Recreation
The Cidery	Bridgetown-Greenbushes	Winery/Cidery/Brewery
The Old Gaol	Bridgetown-Greenbushes	Museum/Historical
Town Heritage Walk	Bridgetown-Greenbushes	Museum/Historical
Wag Walters Emporium	Bridgetown-Greenbushes	Specialty Store
Beedelup Falls	Manjimup	Nature/Recreation
Bibbulmun Track	Manjimup	Nature/Recreation
Bicentennial Tree	Manjimup	Nature/Recreation
Big Brook Dam	Manjimup	Water Activities
Birding South West	Manjimup	Tour
Boorara State Championship MTB Trail	Manjimup	Nature/Recreation
Broke Inlet	Manjimup	Water Activities
Circular Pool	Manjimup	Water Activities
Cosy Creek Motocross	Manjimup	Motor Sports
Deanmill	Manjimup	Museum/Historical
D'Entrecasteaux National Park	Manjimup	Nature/Recreation
Diamond Tree	Manjimup	Nature/Recreation
Dingup Church	Manjimup	Museum/Historical
Donnelly River Cruises	Manjimup	Water Activities
Donnelly River Wines	Manjimup	Winery/Cidery/Brewery
Fernhook Falls	Manjimup	Nature/Recreation
Fonty's Pool	Manjimup	Water Activities
Four Aces	Manjimup	Nature/Recreation
Giant Tingle Tree	Manjimup	Nature/Recreation
Glenoran Pool	Manjimup	Water Activities
Gloucester Tree	Manjimup	Nature/Recreation
Goblin Swamp	Manjimup	Nature/Recreation
Gold'n Grape Gallery	Manjimup	Art/Gallery
Guadignino Farm	Manjimup	Farm
Hidden River Estate Winery & Restaurant	Manjimup	Winery/Cidery/Brewery
Jarrah Jacks Brewery	Manjimup	Winery/Cidery/Brewery
King Jarrah Tree	Manjimup	Nature/Recreation
Knoll Scenic Drive	Manjimup	Scenic Drive
Lane-Poole Falls	Manjimup	Nature/Recreation
Lost Lake Winery	Manjimup	Winery/Cidery/Brewery
Lyster Orchards Manjimup	Manjimup	Farm
Mandalay Beach	Manjimup	Water Activities

Name	LGA	Type
Manjimup Country Club	Manjimup	Golf/Putt Putt
Manjimup Truffle and Wine Company	Manjimup	Winery/Cidery/Brewery
Manjimup Art Gallery	Manjimup	Art/Gallery
Manjimup Regional AquaCentre	Manjimup	Water Activities
Manjimup Timber and Heritage Park	Manjimup	Nature/Recreation
Manjimup WoodTurners	Manjimup	Craft
Marroning	Manjimup	Water Activities
Mount Chudalup	Manjimup	Nature/Recreation
Mount Frankland National Park	Manjimup	Nature/Recreation
Mountfords Tangletoe Cidery	Manjimup	Winery/Cidery/Brewery
Munda Biddi	Manjimup	Nature/Recreation
Nature Based Camping - Throughout	Manjimup	Nature/Recreation
Northcliffe George Gardner Rock and Fossil Collection	Manjimup	Museum/Historical
Northcliffe Pioneer Museum	Manjimup	Museum/Historical
One Tree Bridge	Manjimup	Nature/Recreation
Painted Tree Gallery	Manjimup	Art/Gallery
Painted Tree Gallery	Manjimup	Art/Gallery
Pemberton Discover Tours	Manjimup	Tour
Pemberton Fine Woodcraft Gallery	Manjimup	Art/Gallery
Pemberton Golf Club	Manjimup	Golf/Putt
Pemberton Hiking and Canoeing	Manjimup	Water Activities
Pemberton Mountain Bike Park	Manjimup	Nature/Recreation
Pemberton Swimming Pool	Manjimup	Water Activities
Perup Discover Centre	Manjimup	Education
Petrichor Gallery	Manjimup	Art/Gallery
Pioneer Cairn	Manjimup	Museum/Historical
Pioneer Cemetery	Manjimup	Museum/Historical
Salitage	Manjimup	Winery/Cidery/Brewery
Shannon National Park	Manjimup	Nature/Recreation
Silkwood Winery	Manjimup	Winery/Cidery/Brewery
Strawberry Farms	Manjimup	Farm
Swarbrick	Manjimup	Art/Gallery
Tales of the Trail Western Ranch Trail Rides	Manjimup	Horse Riding
The Bunnings Age of Steam Museum	Manjimup	Museum/Historical
The Cascades	Manjimup	Nature/Recreation
The Historic Hamlet	Manjimup	Museum/Historical
The Pemberton Trailway Co.	Manjimup	Tram
The Peter Kovacsy Studio	Manjimup	Art/Gallery
Tracks and Trails	Manjimup	Nature/Recreation
Trout Fishing	Manjimup	Water Activities
Understory Art and Nature	Manjimup	Art/Gallery
Valley of the Giants Tree Top Walk	Manjimup	Nature/Recreation
Walpole Country Club	Manjimup	Golf/Putt Putt
Walpole Wilderness Discovery Centre	Manjimup	Museum/Historical
Walpole-Nornalup National Park	Manjimup	Nature/Recreation
Warren National Park	Manjimup	Nature/Recreation

Name	LGA	Type
Wildflowers all spring	Manjimup	Nature/Recreation
Windy Harbour	Manjimup	Nature/Recreation
Woodgate Winery	Manjimup	Winery/Cidery/Brewery
WOW Wilderness Ecocruise	Manjimup	Water Activities
Yeagerup Dunes	Manjimup	Nature/Recreation
A Taste of Nannup	Nannup	Specialty Store
Barrabup Pool	Nannup	Water Activities
Cambray Cheese	Nannup	Winery/Cidery/Brewery
Chetsnut Brae	Nannup	Farm
Deep Forest Iron	Nannup	Specialty Store
Gumnuts Galore Mini Putt Putt	Nannup	Golf/Putt Putt
Holberry Sculpture Walk	Nannup	Art/Gallery
Kondil Park Recreation Area	Nannup	Nature/Recreation
Merri Bee Organic Farm	Nannup	Farm
Nannup Clockworks	Nannup	Specialty Store
Nannup Lavendar Farm	Nannup	Farm
Scotts Orchard	Nannup	Farm
Tathra Winery & Restaurant	Nannup	Specialty Store
The Nannup Furniture Gallery	Nannup	Specialty Store
Timberline Trail	Nannup	Nature/Recreation
Word of Mouth	Nannup	Specialty Store

10.3.3. Events Audit

Table 30: Full Events Audit

Name	Shire	Type
Anzac Day Services	All Shires	Arts/Cultural
Australia Day Celebrations	All Shires	Festival
Christmas Gatherings	All Shires	Festival
Festival of Country Gardens	All Shires	Festival
A Banquet on a Bridge Long Table Lunch	Bridgetown-Greenbushes	Food & Beverage
Annual Wattle Walk	Bridgetown-Greenbushes	Walk
Blackwood Classic Power Dinghy Race	Bridgetown-Greenbushes	Sporting/Competition
Blackwood River Chamber Festival (Biennial)	Bridgetown-Greenbushes	Festival
Blackwood Valley & WA Boutique Wine Show	Bridgetown-Greenbushes	Food & Beverage
Blues@Bridgetown	Bridgetown-Greenbushes	Music
Bridgetown Agricultural Show	Bridgetown-Greenbushes	Show
Bridgetown Easter Tennis Tournament	Bridgetown-Greenbushes	Sporting/Competition
Bridgetown Heritage Field Day (Biennial)	Bridgetown-Greenbushes	Exhibition
Bridgetown in the Winter Festival (June/July/August)	Bridgetown-Greenbushes	Festival
Bridgetown Scramble	Bridgetown-Greenbushes	Sporting/Competition
Christmas Craft Fair	Bridgetown-Greenbushes	Festival
Down Under Country Music Festival	Bridgetown-Greenbushes	Festival
Ford House Autumn Garden Fair	Bridgetown-Greenbushes	Festival
Ford House Spring Garden Fair	Bridgetown-Greenbushes	Festival
Geegelup State Kayak Championships	Bridgetown-Greenbushes	Sporting/Competition

Name	Shire	Type
Greenbushes Fun Run	Bridgetown-Greenbushes	Sporting/Competition
Greenbushes Mine Open Day	Bridgetown-Greenbushes	Open Day
Greenbushes Winter Weekend	Bridgetown-Greenbushes	Festival
Rotary Blackwood Marathon Relay	Bridgetown-Greenbushes	Sporting/Competition
Rotary Bridgetown Ouch Festival for Youth	Bridgetown-Greenbushes	Festival
Rotary Up Close & Classical Concert	Bridgetown-Greenbushes	Music
South West Open Chess Championship	Bridgetown-Greenbushes	Sporting/Competition
Sunnyside Sprint Power Boat Race	Bridgetown-Greenbushes	Sporting/Competition
Taste of the Blackwood Festival	Bridgetown-Greenbushes	Food & Beverage
Avag'day in Walpole	Manjimup	Festival
Carols By Candellight	Manjimup	Music
Cherry Harmony Festival	Manjimup	Festival
Jazz in the Jarrah	Manjimup	Music
JB Ipsen Golf Tournament	Manjimup	Sporting/Competition
Karri Cup	Manjimup	Sporting/Competition
Karri Valley Triathlon	Manjimup	Sporting/Competition
Kristofferson Cup Golf Tournament	Manjimup	Festival
Manjimup 15000	Manjimup	Sporting/Competition
Manjimup Bluegrass and Old Time Music Weekend	Manjimup	Music
Manjimup Farmers Market (24 yearly)	Manjimup	Markets
Manjimup Speedway Nationals and others	Manjimup	Sporting/Competition
National Youth Week -Youth Festival Day	Manjimup	Festival
Pemberton Arts Annual Exhibition	Manjimup	Arts/Cultural
Pemberton Classic	Manjimup	Sporting/Competition
Pemberton New Years Event	Manjimup	Music
Quinninup Annual Market Day	Manjimup	Markets
Steps for Stessy	Manjimup	Fundraiser
Subaru National Mountain Bike Series	Manjimup	Sporting/Competition
TARGA Rally	Manjimup	Sporting/Competition
Truffle Kerfuffle	Manjimup	Festival
Turning on the lights	Manjimup	Festival
Unearthed Pemberton Festival	Manjimup	Festival
Walk for Cancer	Manjimup	Fundraiser
Walpole Annual Arts Exhibition	Manjimup	Arts/Cultural
Walpole Easter Markets	Manjimup	Markets
Walpole Enduro	Manjimup	Sporting/Competition
Walpole Fun Run	Manjimup	Sporting/Competition
Walpole in the Trees Regatta	Manjimup	Sporting/Competition
Walpole Pioneer Golf Cup	Manjimup	Sporting/Competition
Warren Agricultural Show	Manjimup	Show
Blackwood Classic Boat Race (Annual)	Nannup	Sporting/Competition
Nannup Arts Festival (Annual)	Nannup	Arts/Cultural
Nannup Flower and Garden Festival (Annual)	Nannup	Festival
Nannup Markets (Fortnightly)	Nannup	Markets
Nannup Music Festival (Annual)	Nannup	Festival
Nannup Quit Forest Rally (Annual)	Nannup	Sporting/Competition

Name	Shire	Type
Power Dingy Boat Race (Annual)	Nannup	Sporting/Competition
Regional Rose Festival	Nannup	Festival
Satalyst Tour of Margaret River (Annual)	Nannup	Sporting/Competition
South West Food Bowl Festival (Biennial)	Nannup	Food & Beverage

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