



THE VALUE OF VISITOR CENTRES IN WESTERN AUSTRALIA

WA TOURISM CONFERENCE | 27 MAY 2025



Tourism
WESTERN AUSTRALIA



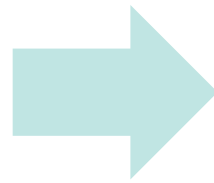


VISITOR CENTRES
ARE AN IMPORTANT
AND VALUABLE PART
OF THE VISITOR
ECONOMY IN
WESTERN AUSTRALIA

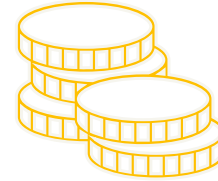
'VALUE' IS OFTEN HARD TO MEASURE DUE TO THE NATURE OF THE SERVICES PROVIDED:



- Offering local knowledge and advice
- Free maps and guides
- Recommending itineraries and tourism experiences
- Referrals to local businesses
- Taking bookings



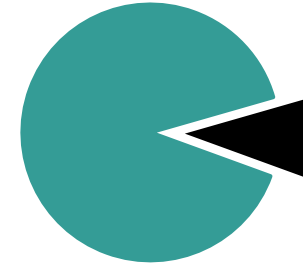
ENHANCED
EXPERIENCE



CURRENT &
FUTURE



TOURISM
OPERATORS



VISITOR
CENTRES



In 2015, Tourism Research Australia (TRA) in conjunction with Tourism WA and TCWA, conducted a study that found visitor centres in WA contributed

\$116 MILLION SPEND

TO THE VISITOR ECONOMY ANNUALLY

IT WAS TIME FOR
AN UPDATE!

2023 UPDATE



A man wearing a straw hat, glasses, a white t-shirt, and dark pants stands on a rocky outcrop, looking out over a vast, green forested landscape. He is holding a glass of beer in his left hand and has his right hand on his hip. The background is a dense forest of tall, thin trees under a bright sky.

MORE INFORMATION ABOUT VISITOR CENTRES...

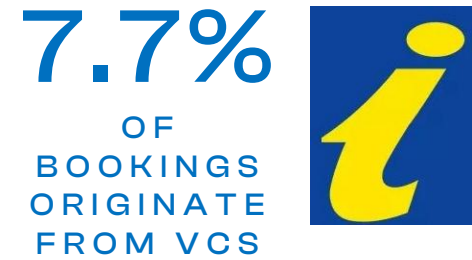
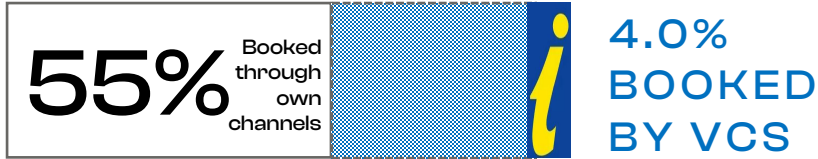
BUSINESS METRICS

- How visitor centres operate / function
- Bookings through visitor centres

CONSUMER METRICS

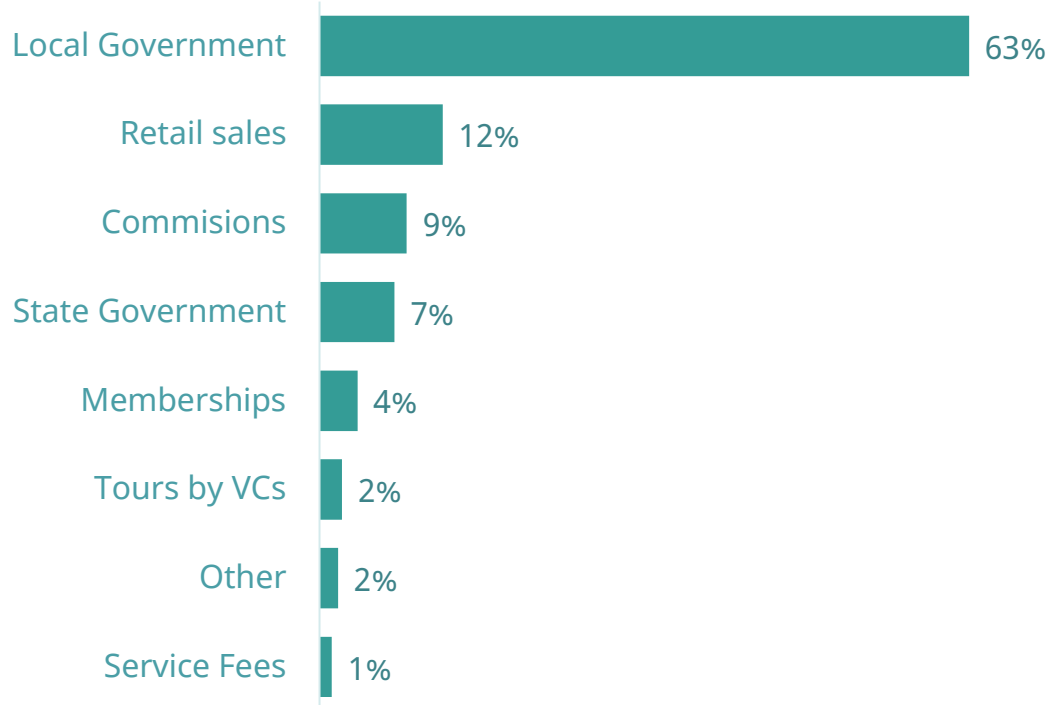
- Usage
- Profiles
- Impact on behaviour and spend

TCWA QUARTERLY BUSINESS SURVEY



TCWA VISITOR CENTRE SURVEY

FUNDING SOURCE



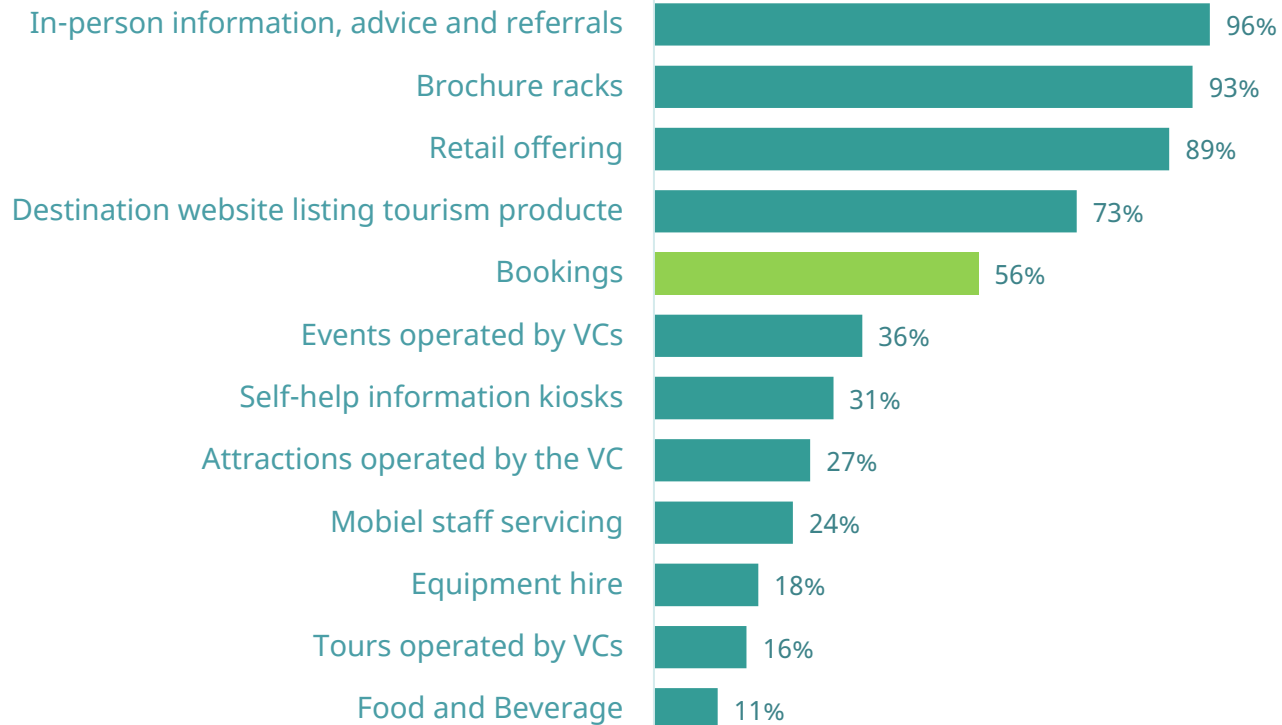
9 out of 10 visitor centres have some funding from their LGA

4 out of 10 visitor centres are 100% funded by their LGA

Two thirds of visitor centres are confident that they will continue to receive funding in the long term (5-10 years)

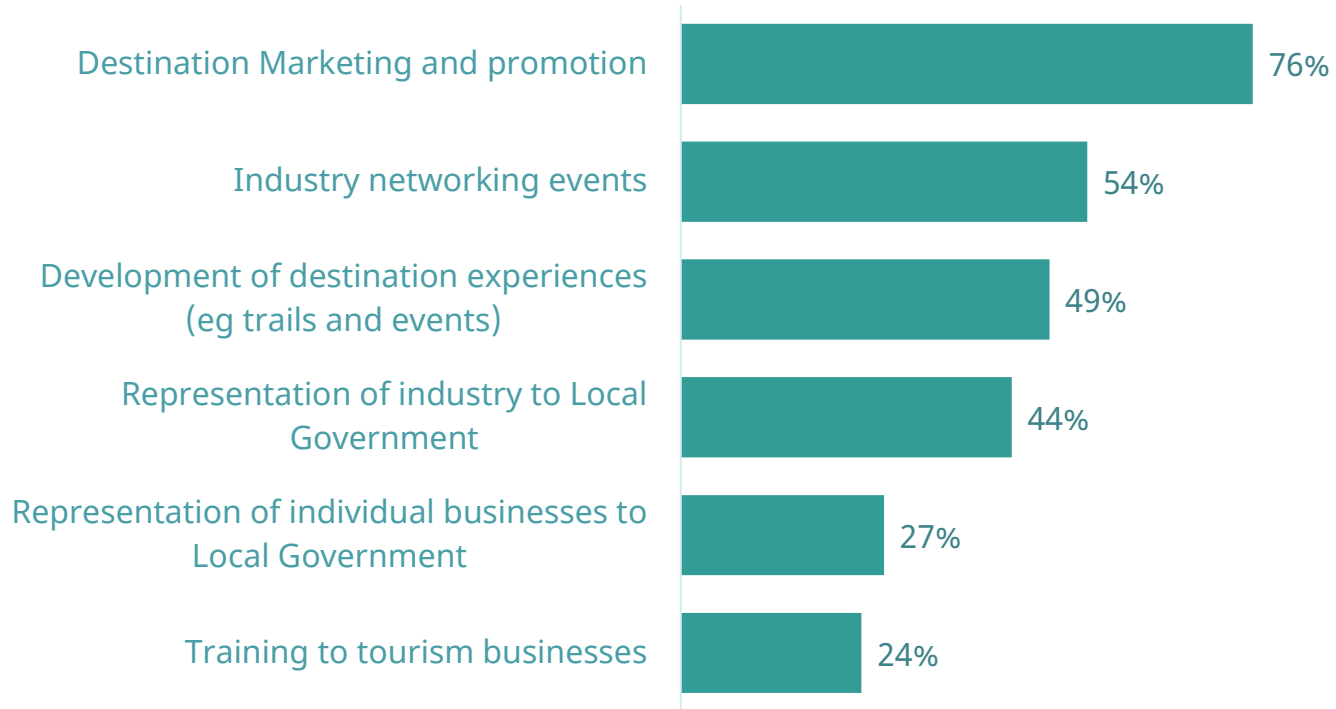
TCWA VISITOR CENTRE SURVEY

SERVICES TO VISITORS



TCWA VISITOR CENTRE SURVEY

SERVICES TO INDUSTRY



TCWA VISITOR CENTRE SURVEY

SELF REPORTED TRAFFIC

Metric	Sample size	Volume	Average/ per centre	Avg. % of total interactions
Door counts	40	1,451,951*	36,299	22%
Phone calls	27	78,321	2,901	2%
Emails	24	81,807	3,413	2%
Web visits	19	2,337,019	123,001	74%

**\$288K PER
VISITOR
CENTRE IN
BOOKINGS**
(N=17)

**\$89K PER
VISITOR
CENTRE IN
RETAIL
SALES** (N=26)

*NVS/IVS reports almost 2 million visitors to all Visitor Centres in 2023



CONSUMER RESEARCH



Painted Dog Research

THE CONSUMER RESEARCH OBJECTIVES

1

USERS
AND
USAGE

2

USER
EXPERIENCE

3

VALUE OF
VISITOR
CENTRES

METHODOLOGY

- **2,307** INTERCEPTS IN REGION
- **182** ON-LINE SURVEYS FROM VC CONTACT LISTS
- **376** ON-LINE SURVEYS THROUGH QR CODES DISPLAYED IN VCS
- **1,083** GENERAL POPULATION ON-LINE SURVEYS INTERSTATE AND INTRASTATE



ALMOST 4,000 PEOPLE CONTRIBUTED TO THE RESEARCH

1,472 VISITOR CENTRE USERS, 1,393 NON-USERS,
1,083 GENERAL POPULATION



USERS AND USAGE



Painted Dog Research

VISITOR CENTRE USERS (v NON-USERS) PROFILE

Demographics:

Not hugely different, however users are more likely to be in the age bracket **35-54 years**, be **travelling with family** (young or maturing), and in **higher income** brackets.

Travel behavior:

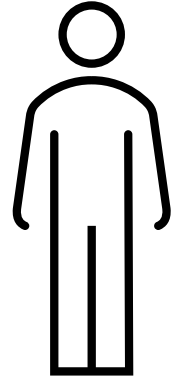
Users are significantly more likely to be **on holiday** (rather than VFR), **visiting a location for the first time**, **staying overnight** in location and staying in **rented apartments or caravan sites**

Planning and booking:

Users prefer to **plan their trips independently**, utilizing **travel sites** including **visitor centre websites**, and are more likely to **contact operators directly**.

Yield:

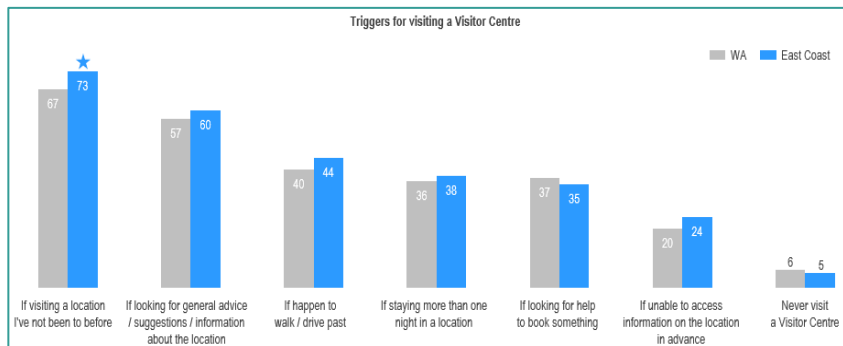
Compared to non-users, visitor centre users **stay longer** (+0.8 days), take part in **more activities** (+25%), and **spend more** (+30%).



VISITOR CENTRE
USERS ARE **GREATER
ADVOCATES** FOR A
DESTINATION, WITH
66% SAYING THEIR
TRIP WAS BETTER
THAN EXPECTED,
VERSUS **41%** OF
NON-USERS.

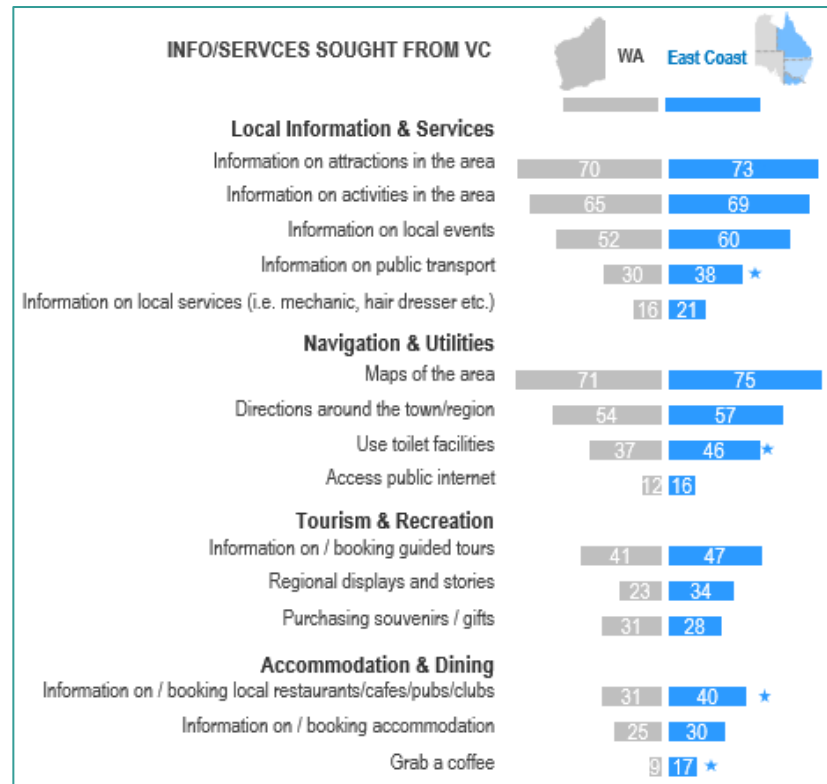
VISITOR CENTRE USERS REASON FOR USE

Top Triggers for visiting a visitor centre are visiting a **new location** and **seeking general advice**.



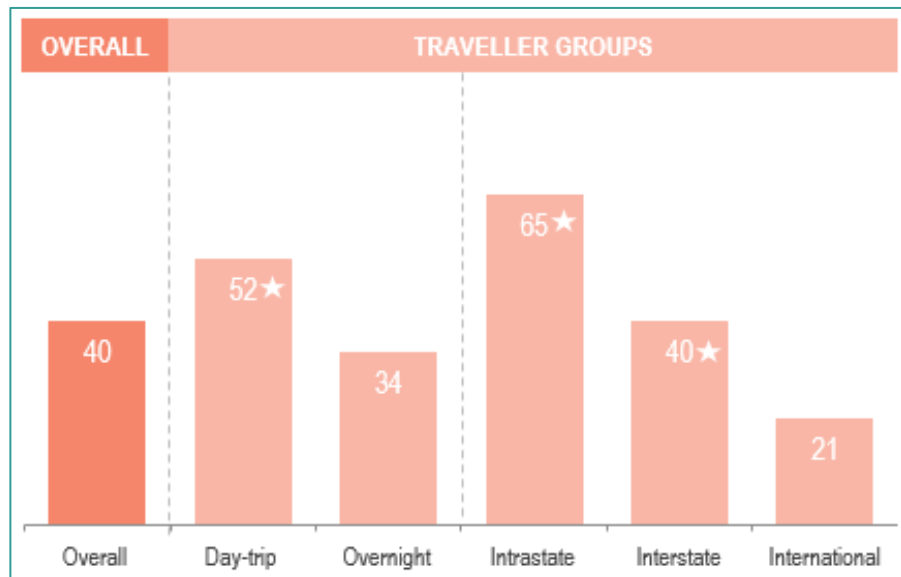
However, around **50%** of respondents said they **prefer** using **online** sources of information about a destination.

Maps and information on **attractions / activities** are the main services travellers seek from a visitor centre.

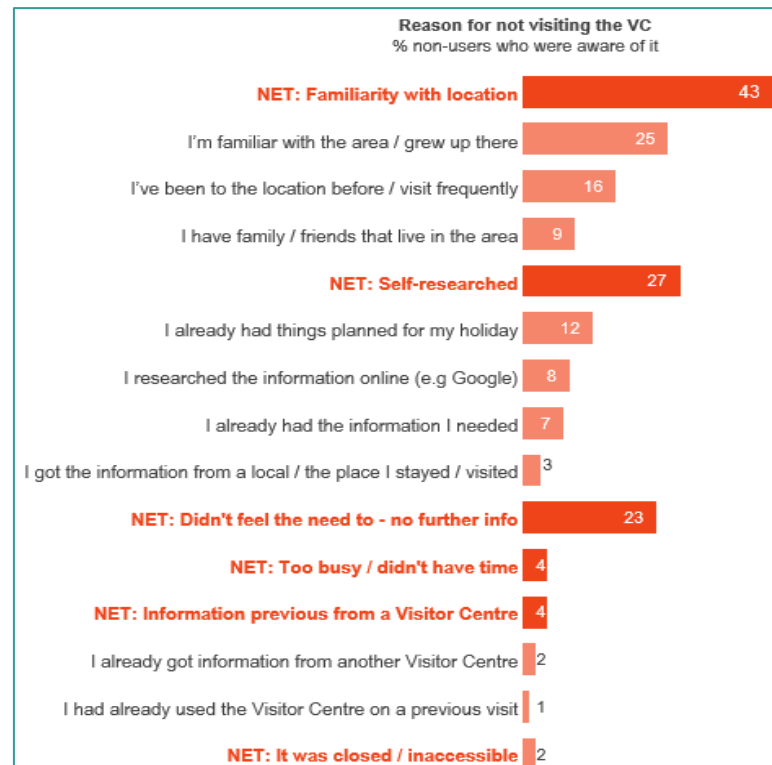


NON-USERS

Only **40%** of non-users were aware of the Visitor Centre in the town they were visiting.

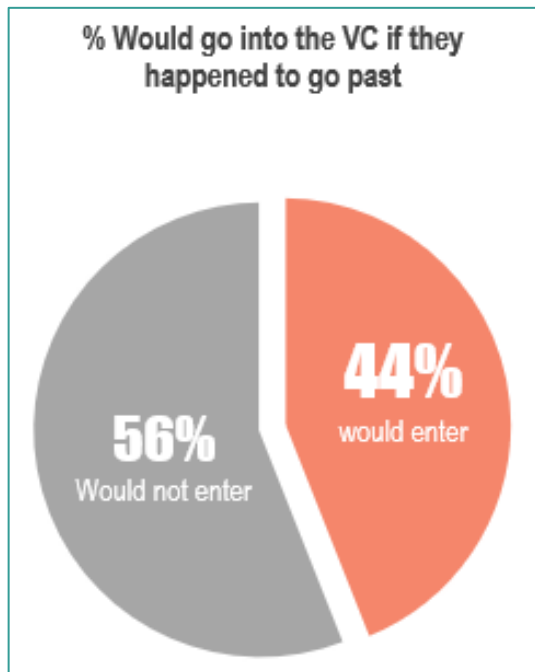


Aside from a lack of awareness, **prior familiarity** with the location and already being **well-researched** were key reasons for not using the visitor centre.



NON-USERS

Almost **half** of non-users would be likely to enter a visitor centre if they happened to go past it



Coupons or deals would be the best way to attract non-users

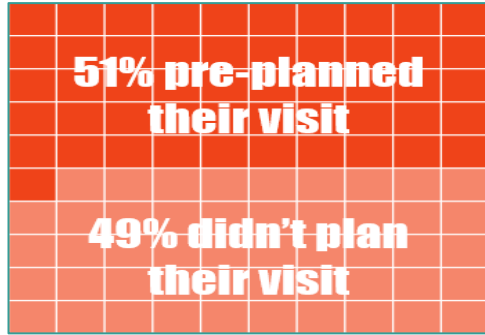


USER EXPERIENCE

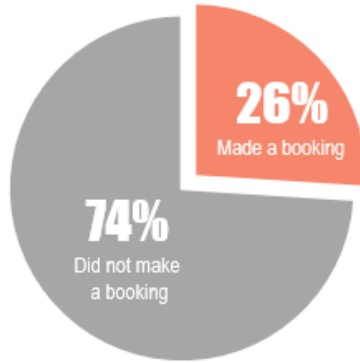


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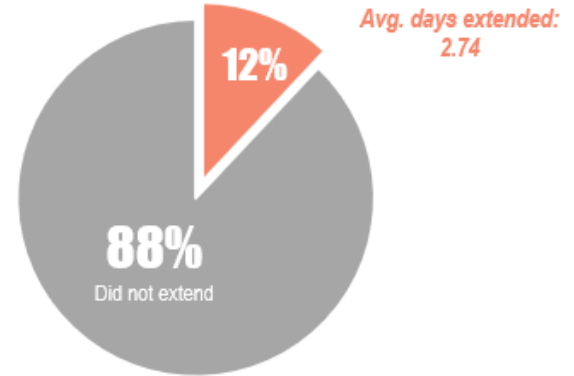
VISITOR CENTRE USER EXPERIENCE...



AROUND
HALF
PLAN THEIR
VISIT

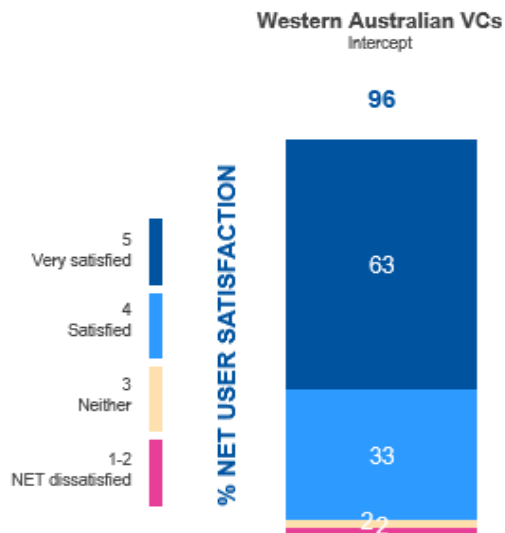


AROUND A
QUARTER
MAKE A
BOOKING

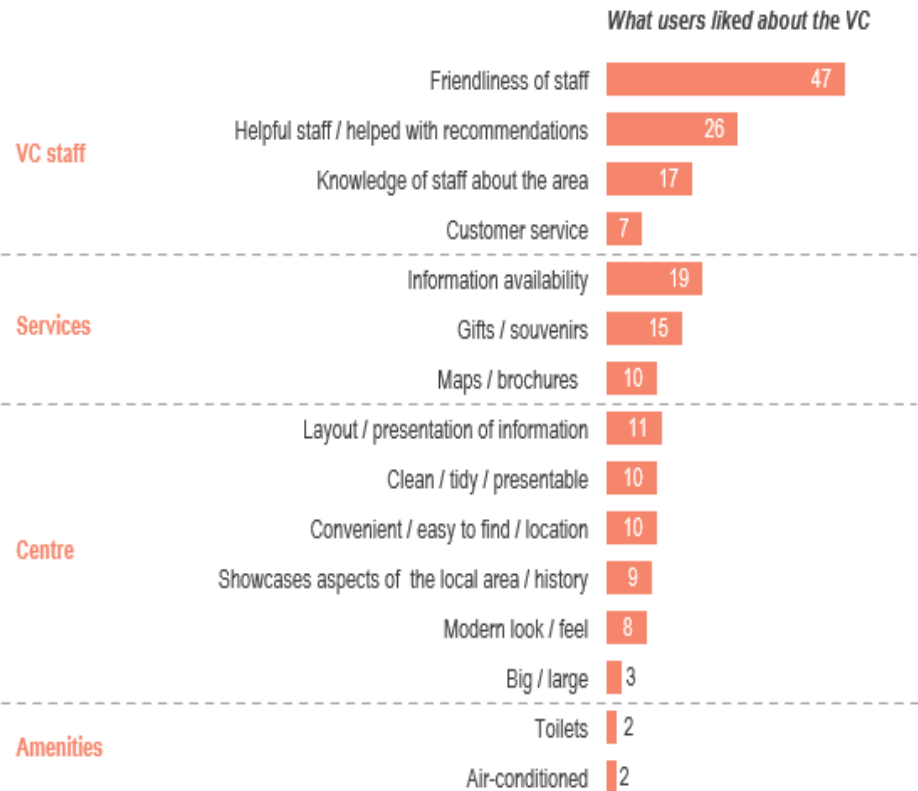


1 IN 8
EXTEND
THEIR STAY

VISITOR CENTRE USER EXPERIENCE...



**96% OF VISITORS
ARE SATISFIED**



66%*
*mentioned staff
as reason for
their satisfaction*

USERS GOT WHAT THEY CAME FOR ...



Q15. What were you seeking when you entered the Visitor Centre?

Q16. And what information or services did you end up using at the Visitor Centre? Base: Users (n=1472). *proportion of users who received information/services, relative to the proportion who sought them.

VALUE OF VISITOR CENTRES



Painted Dog Research

DATA COLLECTED

USERS
(N=1407)

NON-USERS
(N=1376)

TELLS
US

TOTAL
SPEND IN
DESTINATION



MINUS



EQUALS

TOTAL VISITOR
SPEND
SUPPORTED
BY VISITOR
CENTRES

SPEND AS A
RESULT OF
VISITING THE
VISITOR
CENTRE



VISITOR SPEND,
DIRECTLY
ATTRIBUTABLE
TO A VISITOR
CENTRE VISIT

DATA COLLECTED

\$226M

Spend by overnight visitors, directly attributable to a Visitor Centre visit



\$35M

Spend by day-trip visitors, directly attributable to a Visitor Centre visit



\$261M

Total visitor spend, directly attributable to a Visitor Centre visit



Direct Comparison to 2015

\$116M

\$740M

Incremental total spend by Visitor Centre users versus non-users



Total visitor spend supported by Visitor Centres

VISITOR CENTRE RESEARCH SUMMARY INFOGRAPHIC



VALUE OF VISITOR CENTRES IN WESTERN AUSTRALIA

Prepared by Tourism Western Australia, in collaboration with Tourism Council WA

Research conducted in 2023 by Painted Dog Research, on behalf of Tourism WA, demonstrates Visitor Centres in Western Australia play a significant role in shaping travel behaviour, enhancing visitor experiences, and contributing to the value of Western Australia's tourism economy. As such, there is ample evidence to support the continued effort and investment into Visitor Centres across Western Australia. This information is particularly relevant for Local Governments, who currently provide an estimated 68% of the operational funding of accredited Visitor Centres in Western Australia.

\$261 MILLION
Incremental visitor spend per annum directly attributable to Visitor Centres.¹

\$740 MILLION
Visitor spend per annum supported by Visitor Centres.¹

2 MILLION
Visitors serviced in 2023; 1.3 million overnight visitors and 700,000 day-trippers.¹

\$
On average, each time a visitor enters a Visitor Centre, additional spend is generated.

REGION	ADDITIONAL SPEND PER USER
Destination Perth	\$126
Regional WA	\$150

Spend is weighted based on volumes of overnight versus daytrip visitors in region. At a total state level, the additional visitor spend generated translates to an estimated \$184M in GVA and \$203M in GSP, supporting 1,705 tourism filled jobs.⁶

DIRECT ECONOMIC IMPACT	
Direct Gross Value Added (GVA)	\$91.5M
Direct Gross State Product (GDP)	\$100.5M
Direct Tourism Filled Jobs	1,026 jobs

TOTAL (DIRECT + INDIRECT) STATE ECONOMIC IMPACT	
Total Gross Value Added (GVA)	\$183.8M
Total Gross State Product (GDP)	\$203.2M
Total Tourism Filled Jobs	1,705 jobs

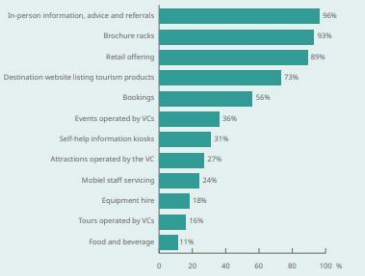
PROFILE OF A TYPICAL WA VISITOR CENTRE USER...

"As users of WA Visitor Centres, we are typically intrastate travellers, and often have children living at home. We usually travel with our immediate family and in small groups of 3 to 4 people, and we typically like exploring new destinations on overnight trips. For our WA trips, we typically stay in rented hotels / motels and travel around by car. Our holidays in and around WA are usually for relaxation or leisure — and we're less likely to be visiting friends / family. When it comes to planning our trips, we typically take charge ourselves — relying on cross-referencing multiple online travel platforms for reliable reviews and information."⁷



SERVICES OFFERED BY VISITOR CENTRES²

More than half (56%) of Visitor Centres make bookings for operators.



PRE-PLANNED VS. SPONTANEOUS

There is an even split between those who pre-plan to visit a VC and those who spontaneously choose to enter as they pass by. Almost half (44%) of visitors who don't use a Visitor Centre do so if they happened to go past it.³ This demonstrates the importance of the location and VCs.

TOP INFO / SERVICES RECEIVED AT VISITOR CENTRES

(% of users)⁴

SERVICING HIGH YIELD TRAVELLERS

WA Visitor Centre users are higher yielding travellers than non-users. On average, Visitor Centre users are more likely than non-users to:

- Stay longer in the destination (5.6 nights vs. 4.9)
- Spend more (particularly on tours and attractions)
- Do more activities (5.4 vs. 4.0 activities)⁵

HIGHLY SATISFIED CUSTOMERS

Almost all (96%) of Visitor Centre users surveyed said they were happy with their experience. The friendliness and helpfulness of staff is the number one driver of customer satisfaction.³ Analysis of online reviews of WA Visitor Centres supports this, showing that 91% of reviews in 2022-23 had a positive sentiment.⁶

DRIVING BUSINESS TO TOURISM OPERATORS

A Tourism Council WA survey of tourism operators in 2023 found that, on average, 8% of all bookings (excluding walk-ups and retail sales) were delivered through Visitor Centres, either via referrals or trade (bookings made through the Visitor Centre).³ More than a quarter (26%) of Visitor Centre users make a booking while they are at the centre, most commonly for guided tours and attractions.¹

More than **1 in 10 (12%)** overnight visitors who used a Visitor Centre chose to **extend their stay in town**. On average, these visitors stayed in town for an **additional 2-3 nights!**³

Sources: 1) Painted Dog on behalf of Tourism WA, Value of Visitor Centres Research, 2023 / 2024. Based on surveys of n=1,472 WA Visitor Centre users, n=1,393 visitors to/in WA who did not use a Visitor Centre (non-users), and n=1,803 Australian general population survey respondents. 2) Tourism Research Australia, International and National Visitor Survey. 3) Tourism Council WA, ReviewPro Visitor Centres Benchmarking Report 2022-2023. 4) Tourism Council WA, Quarterly Business Activity Survey (September Quarter 2023). Survey of n=239 businesses provide a tourism service to patrons such as tours, attractions, activities, events, venues and accommodation. 5) Tourism Council WA, Visitor Centres WA Annual Survey 2022-23, survey of n=41 Golden 1 accredited Visitor Centre Managers. 6) Calculated by TCWA using ratios from Tourism Research Australia's Tourism Satellite Accounts 2022-23. 7) Visitor Centre Manager Survey conducted by TCWA in 2023-24.

CONSISTENCY ACROSS THE REGIONS

The research demonstrated that Visitor Centres are consistently delivering value across WA's five tourism regions. The average result for Visitor Centres in each of the five tourism regions showed:

- Satisfaction levels of more than 90%
- Net Promoter Scores of 44 or higher (i.e. high likelihood for users to recommend the Visitor Centre)
- Support of higher yielding travellers
- Influencing at least half of all users to spend more money in the region
- Users of Visitor Centres are more likely to say the destination exceeded their expectations.¹



OPPORTUNITIES TO OPTIMISE

- Enhance online presence:** Travellers who are unlikely to be the main reason. Increasing exposure to and awareness to visit in-person.
- Offer exclusive deals and local knowledge:** Non-users of Visitor Centres said they could be enticed to use a Visitor Centre if exclusive deals / offers / discounts were available, or to receive unique, local, recommendations that were not available through other channels (i.e. locals-only knowledge).
- Know the customer:** Understanding the profile of visitors in the region is key to Visitor Centres enhancing service delivery and providing relevant recommendations that deliver on what travellers are seeking. The research identified across the regions, users of Visitor Centres skew towards different profiles as follows:

- Australia's North West:** Younger, high information needs, more likely to want to make a booking.
- Australia's Coral Coast:** Families with young children, staying in caravan and camping accommodation.
- Australia's Golden Outback:** Older, staying in rented houses/units, seeking information on attractions.
- Destination Perth:** Interstate and International, staying in hotel/motel/resort or rented houses/units.
- Australia's South West:** Staying in rented houses/units, more likely to be seeking souvenirs / gifts to buy.

Sources: 1) Painted Dog on behalf of Tourism WA, Value of Visitor Centres Research, 2023 / 2024. Based on surveys of n=1,472 WA Visitor Centre users, n=1,393 visitors to/in WA who did not use a Visitor Centre (non-users), and n=1,803 Australian general population survey respondents. 2) Tourism Research Australia, International and National Visitor Survey. 3) Tourism Council WA, ReviewPro Visitor Centres Benchmarking Report 2022-2023. 4) Tourism Council WA, Quarterly Business Activity Survey (September Quarter 2023). Survey of n=239 businesses provide a tourism service to patrons such as tours, attractions, activities, events, venues and accommodation. 5) Tourism Council WA, Visitor Centres WA Annual Survey 2022-23, survey of n=41 Golden 1 accredited Visitor Centre Managers. 6) Calculated by TCWA using ratios from Tourism Research Australia's Tourism Satellite Accounts 2022-23. 7) Visitor Centre Manager Survey conducted by TCWA in 2023-24.

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