Measuring the Value of Visitor Centres in WA

Tourism WA

May 1st 2024

Report prepared by Painted Dog Research

Project Background & Methodology

Background to the project

Across Western Australia, there are 60 accredited Visitor Centres (VCs), and many other centres. In 2015, Tourism Research Australia (TRA), together with Tourism WA and Tourism Council WA, commissioned research on the influence of Visitor Centres on WA Tourist Behaviour. The research provided invaluable research for WA destinations, VC operators, and tourism businesses

Since the 2015 research, many market and technology factors have changed. In particular, the Visitor Centres experienced a significant change in role and renewed engagement with destination marketers, tourism businesses and travellers during COVID.

Therefore, the need to reassess the importance and value of VCs in relation to visitor experience, behaviours and spending in this new landscape is crucial – to help demonstrate the value they continue to bring to the WA tourism economy, and to ultimately secure ongoing support for the operation and funding of VCs across the state by local governments and industry.

Strategic aim & objectives

The aim of this research was to provide evidence and a business case for advocating the ongoing funding of VCs as well as identify ways to optimise their role, services, and performances in order to maximise their contribution to the Australian visitor economy.

Research Objectives

To fulfil the strategic aim, this research met the following informational objectives:

1. Updated the profile of visitors to/within WA who use VCs during their trip (users), including demographics, attitudes, values and behaviours

2. Compared users with visitors to/within WA who do not use VCs during their trip (non-users)

3. Determined reasons for use (and non-use) of visitor centres when travelling and evaluated visitor expectations of visitor centres including the services they should provide

4. Determined visitor satisfaction with visitor centres and identified any areas where they excel and/or need to improve

5. Measured the degree to which visitor centres influence visitor behaviour in terms of spend, length of stay, participation in activities, attractions/locations visited, intention for repeat visitation and perception of the region and WA;

6. Determined the influence that VCs have on visitor spend in the region.

7. Compared the above results between Tourism Regions.

At the outset of this project, 10 destinations were selected to conduct face-to-face engagement in.

A number of criteria were applied to select the most appropriate locations:

REPRESENTATION

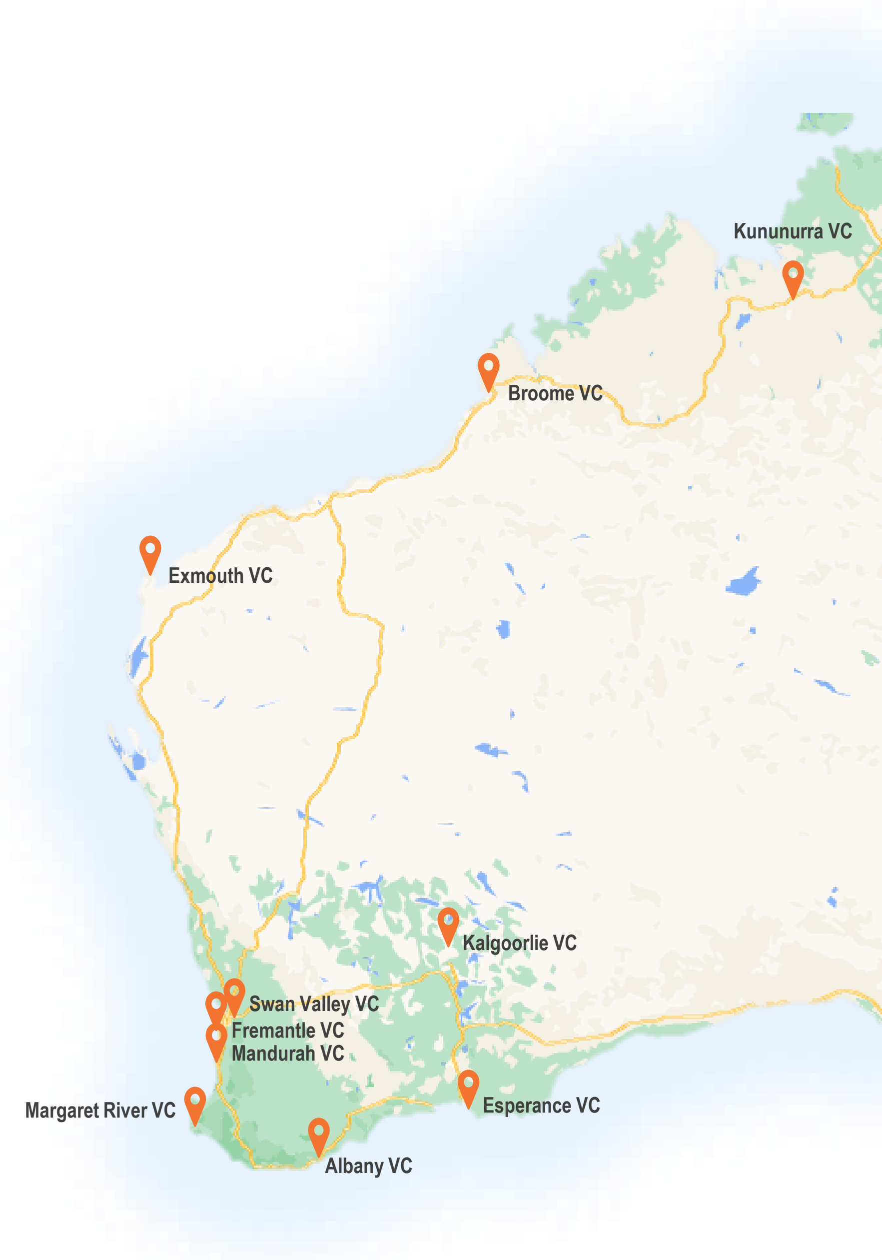
- At least one VC per region
- Number of destinations per region should be relative to visitation
- Need a good representation of different *ways* VCs are used by visitors

SAMPLE ACHIEVABILITY

- Locations must allow for sufficient sample to be captured for statistically powerful and reliable analysis (i.e. strong visitor numbers)

FIELDWORK LOGISTICS

- Allow for a sensible / seasonally appropriate fieldwork schedule



Research methodology

Four methodological approaches were used in order to ensure a robust, representative sample was achieved across three core audiences.

1 Destination Intercepts

- As the primary methodology, face-to-face engagement was carried out in 10 selected destinations across WA.
- In both the Visitor Centres and other parts of town, travellers were intercepted and encouraged to take part in an online survey – a strategy which engaged both VC users and non-users.
- A sample of **n=2,307** was achieved via this approach (exceeding the target sample of n=2,000).

2 VC Contact Lists

- To supplement the face-to-face engagement carried out across the 10 core destinations (particularly in locations where peak season had passed before fieldwork had commenced), where possible, contact lists of recent VC users were supplied by the centres.
- An online survey was emailed to these contacts.
- A sample of **n=182** additional VC users was achieved via this approach.

3 QR Code Posters

- To ensure all VCs across WA had the opportunity to take part in the research, and all travellers could take part, posters were displayed in **64** additional VCs (beyond the 10 selected).
- Users of these VCs were encouraged to scan the QR code and complete the online survey.
- A total sample of **n=376** additional VC users was achieved via this approach.

4 Online Panel

- In order to obtain the perspective of the general population across WA, but also the East Coast (VIC, NSW and QLD), a representative sample was sourced via an ISO-accredited online panel.
- A total sample of **n=1083** was achieved via this approach (n=409 WA, n=674 East Coast).

Survey sample

The survey was conducted among three core audiences: the **Australian general population, WA VC users and non-users**. Large, reliable samples of each audience were achieved in each region. Among WA travellers, a spread of intrastate, interstate and international respondents were engaged.

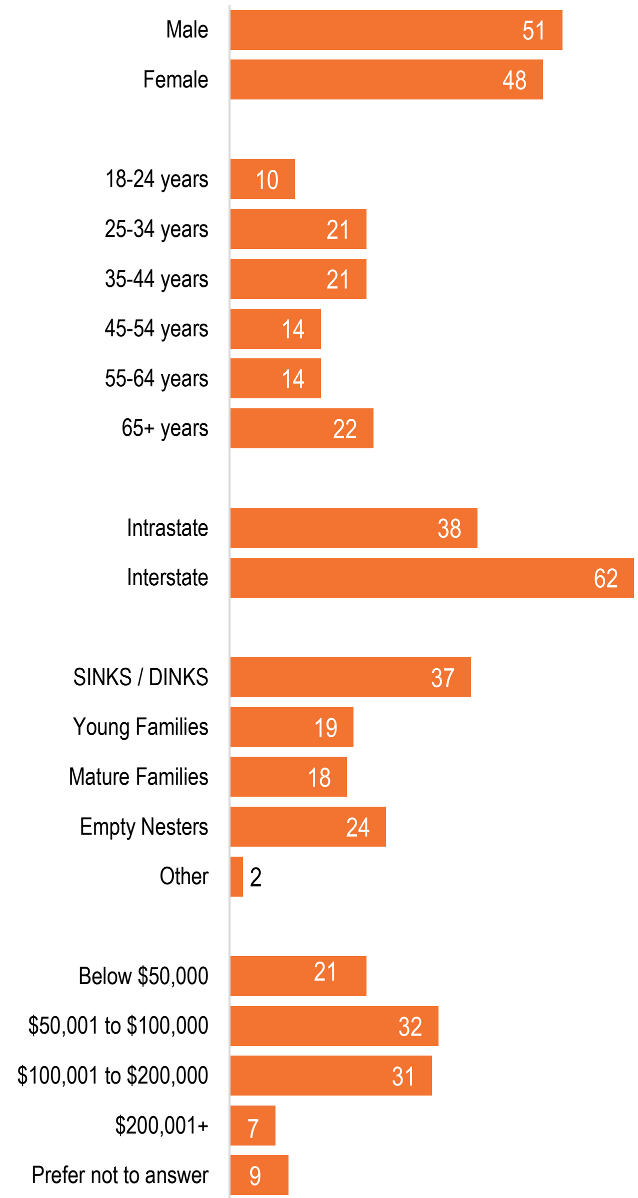
WA VC users	WA VC non-users	AUS General population
Total sample: n=1,472	Total sample: n=1,393	Total sample: n=1,083

Among WA Travellers...		
Intrastate: n=1,698	Interstate: n=716	International: n=451

DP:	ASW:	AGO:	ACC:	ANW:
n=1,068	n=661	n=452	n=240	n=444

Demographic profile snapshot:
General population

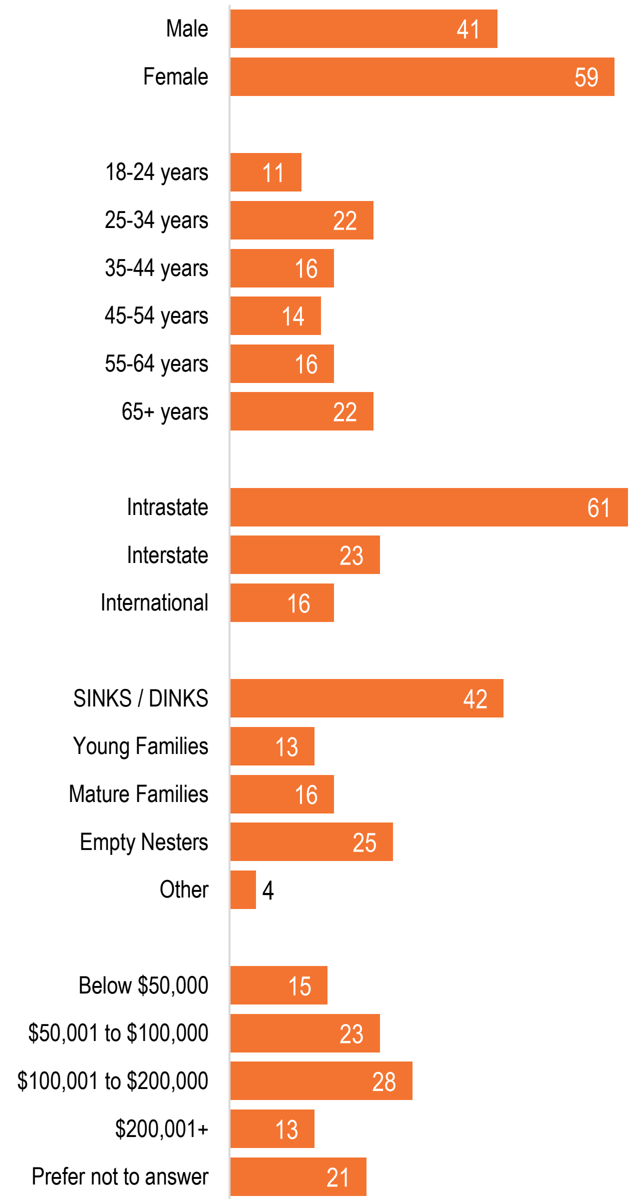
Our sample of the general population audience of n=1,083 is shown right.
These respondents came from WA (n=409) and NSW, VIC, and QLD (n=674).



Base: General Population Survey (n=1083).

Demographic profile snapshot:
Intercepted travellers

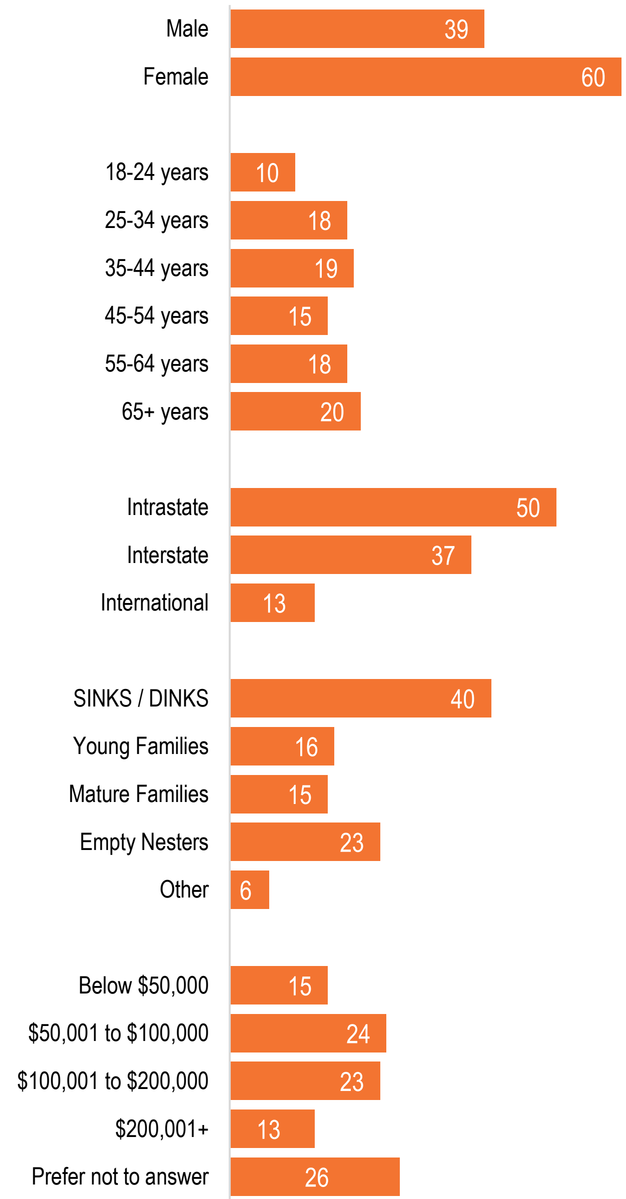
Our sample of the intercepted travellers from the 10 key Visitor Centres of n=2,489.



Base: Intercept Survey – 10 key Visitor Centres (n=2,489).

Demographic profile snapshot: Other travellers

- Armadale
- Bridgetown
- Bunbury
- Busselton
- Central Wheatbelt
- Coolgardie
- Cue District
- Dongara
- Dwellingup
- Geraldton
- Jurien Bay
- Kalamunda
- Kalbarri
- Karratha
- Kojonup
- Lancelin
- Laverton
- Mount Barker
- Mundaring
- Narrogin
- Perth CBD
- Port Hedland
- Rottnest Island
- Shark Bay
- Shoalwater
- Tom Price
- Toodyay
- Walpole



Base: Other VC Intercept Survey (n=376).

Post-weighting approach

General Population

The general population was quota sampled and post-weighted to general population proportions of state, age, gender and regional status (as per ABS, 2021 Census).

Intercept and Other VCs

Data collected among travellers was also weighted to reflect accurate visitation figures. The samples we collected were intentionally not naturally representative of this, as quotas were set to ensure sufficient minimum samples of groups of interest (e.g. VC users, international travellers, equal number of visitors intercepted in each town etc.). VC users and non-users were post-weighted to 2023 IVS/NVS proportions by market (intrastate, interstate, and international) and the region they visited.

VC users were also weighted by their known usage of VCs (as per IVS/NVS) by their market of origin (intrastate, interstate, and international), to again account for the deliberate oversampling of particular users (to enable robust sub-group analysis).

The Broader Context of Visitor Centres in Aus

Measuring Visitor Centre usage in Australia

- What do Australians know about Visitor Centres?
- When and why would they use a Visitor Centre?
- How many have visited a Visitor Centre?

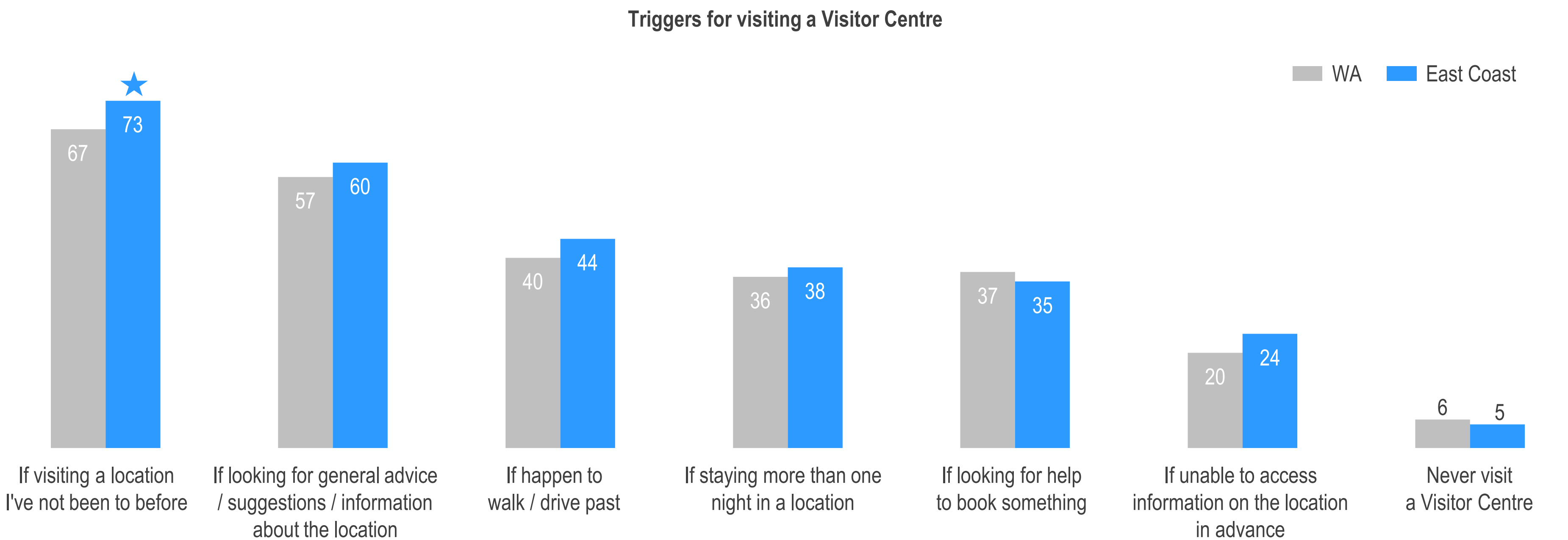
Most Australians have some level of understanding about VCs, mostly knowing they provide info and advice about local attractions.

State-to-state, the understanding of VCs is similar. The only difference is that West Australians are more likely to mention that the role of a VC is to provide assistance with bookings.

Q45. In your own words, how would you describe the role of a Visitor's Centre or tourist bureau? Base: All respondents general public survey intrastate (n=409), interstate (n=674). Not responses below 4% not shown.

Visiting a destination for the first time is a key trigger for using a VC.

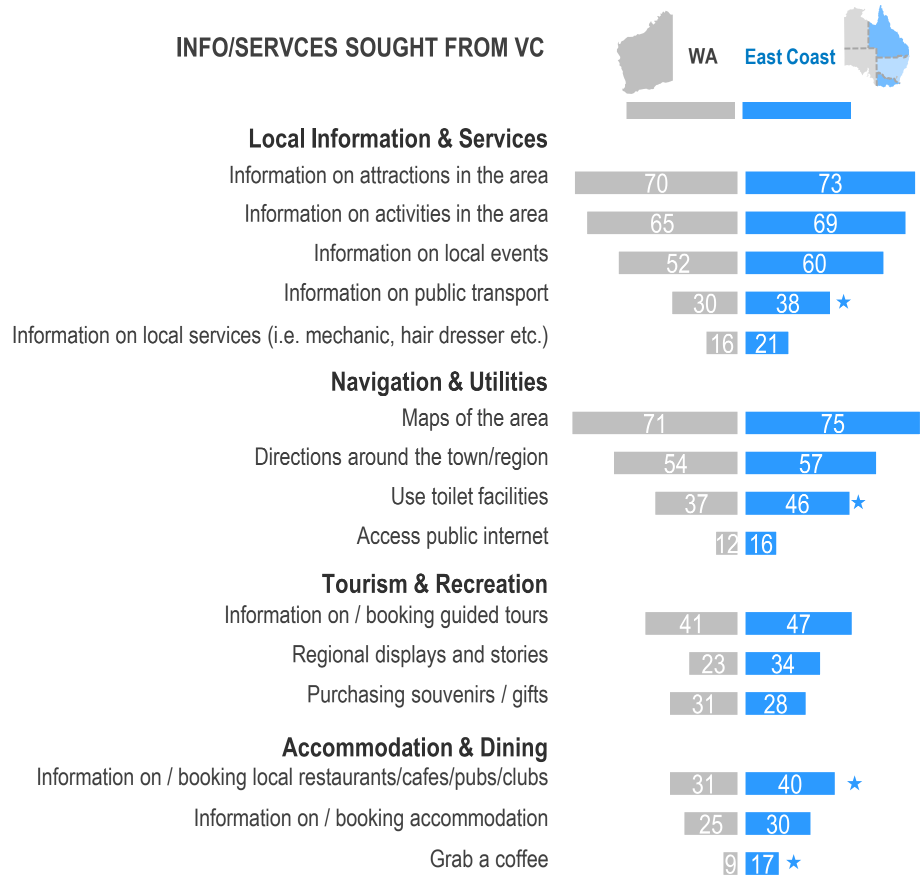
Those who live on the East Coast are even more likely to agree with this (73% vs 67% in WA).



Q10. During a holiday, in what situations, if any, would you visit a Visitor Centre? Base: General population survey; Interstate travellers (n=674), Intrastate travellers (n=409)

Maps and information on attractions / activities are the main services travellers would seek from a VC.

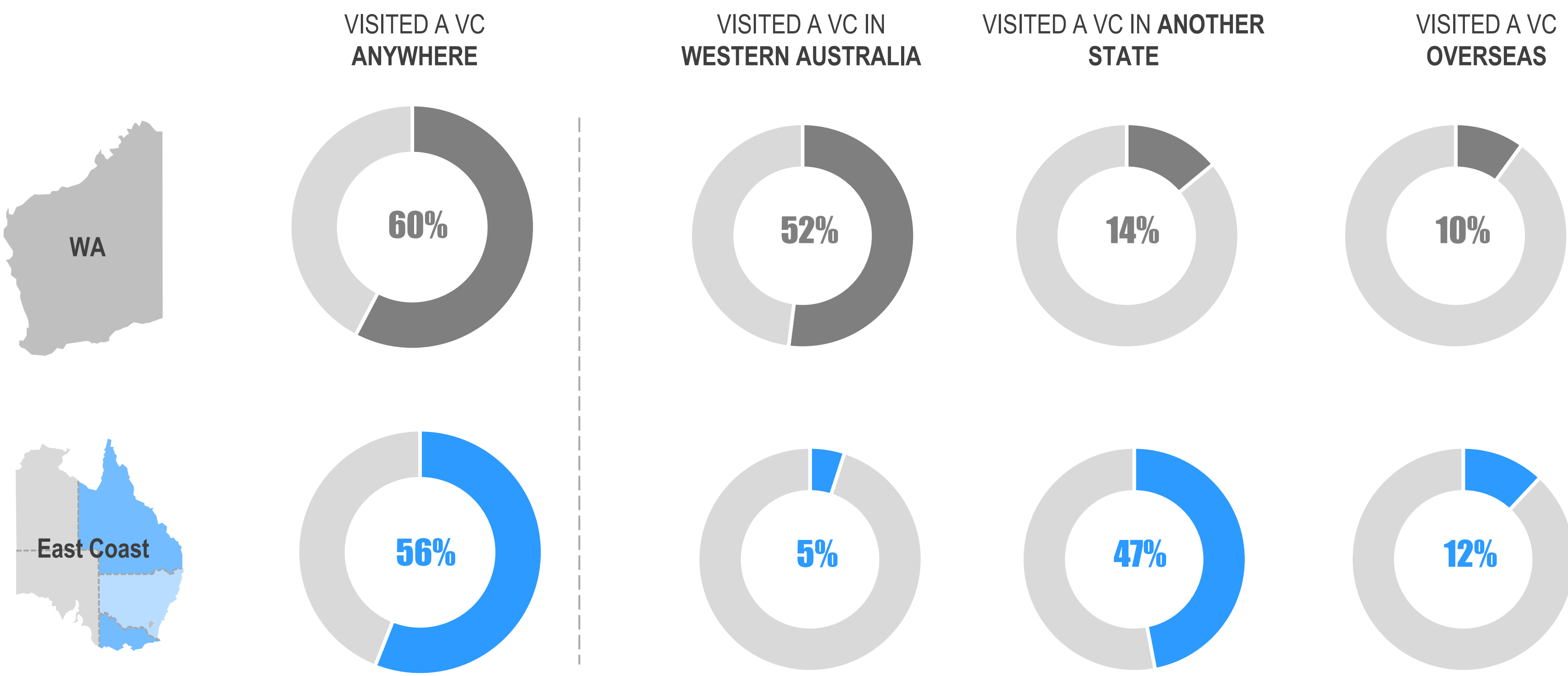
The overall trends are the same between the East Coat and WA, although the East Coast are more likely to use VCs for seeking information on restaurants and public transport.



Q38. What information or services would you be seeking from the Visitor Centre? Base: General population survey; Interstate (n=674), Intrastate (n=409)

Over half say they have visited a VC either in Australia or overseas in the past 3 years.

Usage is slightly higher among West Australians.

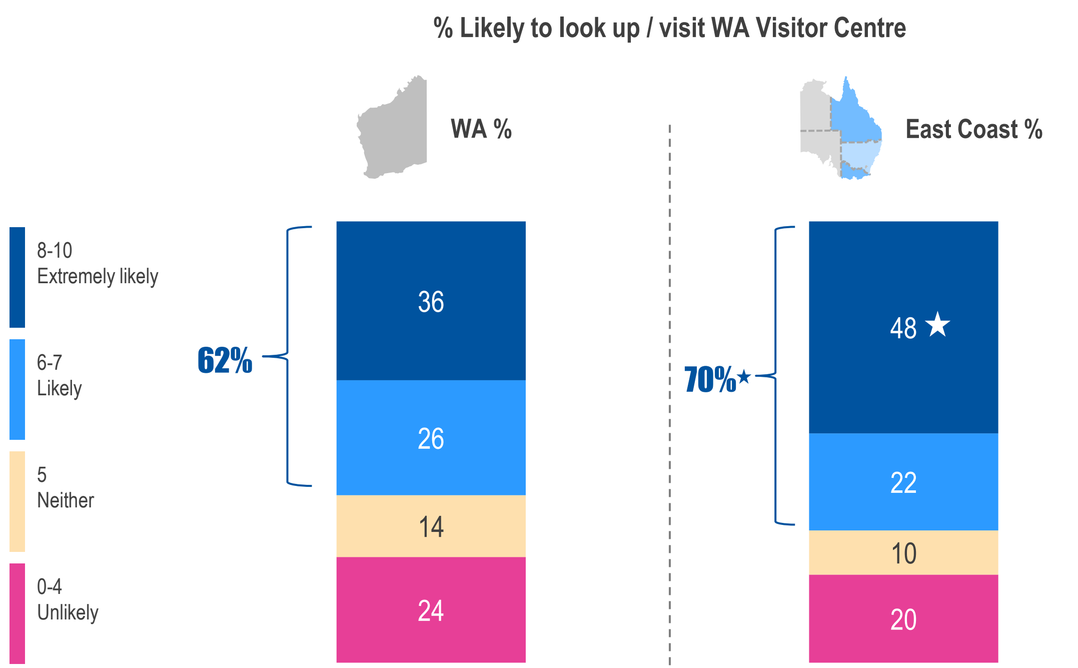


Q12. Have you visited any Visitor Centres within the past three years? Base: Interstate (n=674), Intrastate (n=409)

So, how likely are Australians to use a Visitor Centre when travelling in WA?

Encouragingly, the vast majority say they are likely to look up or visit a VC when holidaying in WA.

Intentions to engage with a VC when holiday in WA are significantly stronger among East Coast travellers – reflecting their lower levels of familiarly with WA. But likelihood still remains strong among the intrastate audience.



Q37. If you were to holiday to or within Western Australia, how likely is it that you would look up or visit a Visitor Centre? Base: Interstate (n=674), Intrastate (n=409).

However, a preference for accessing information online is a barrier to VC usage for 1 in 2, across both markets.

In addition, East Coast travellers are significantly more likely to lack awareness about Visitor Centres in WA, including where they're located and what they have to offer. Exploring ways to build awareness and knowledge among out-of-state travellers may increase usage of VC services on arrival.

Unlikely to use a WA VC: Top 10 Reasons	**WA %**	**East Coast %**
Prefer using online resources for information about a destination	51%	48%
Prefer to plan my own itinerary and don't need additional information	35%	35%
Prefer self-guided exploration / discovering places on my own	26%	21%
Don't know where there are Visitor Centres in Western Australia	5%	21% ★
Don't know enough about what they have to offer	8%	16% ★
Prefer to avoid crowds and long lines during peak tourist seasons	15%	15%
Inconvenient location or limited operating hours of Visitors Centres	8%	14%
Don't want to speak to someone / just want the resources not advice	8%	12%
There is usually limited time in my holiday itineraries to visit a Visitor Centre	6%	11%
The services and resources they offer aren't relevant to me / my interests	6%	9%

Q52. What makes you less likely to look up or visit a Visitor Centre if you were on holiday to or within Western Australia? ? Base: Those unlikely to look up or visit a Visitor Centre, Interstate (n=206), Intrastate (n=155).

Understanding WA VC users

Who we are

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.

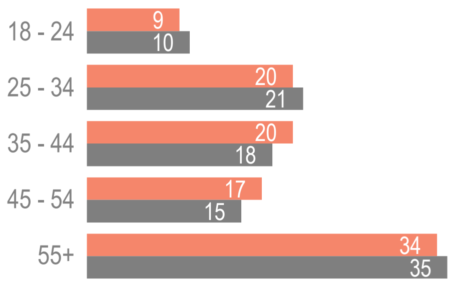
For our WA trips, we typically stay in rented hotels / motels and travel around by car. Our holidays in and around WA are usually for relaxation or leisure – and we're less likely to be visiting friends / family. When it comes to planning our trips, we typically take charge ourselves – relying on cross-referencing multiple online travel platforms for reliable reviews and information. Some of us also do consult Visitor Centres ahead of our trip, to help us plan our stay.

VC usage as per IVS and NVS (International and National Visitor Survey)

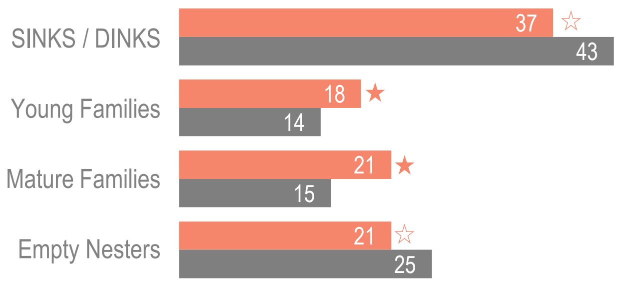
USERS		NON-USERS*	
64%	Intrastate	80%	Intrastate
18%	Interstate	13%	Interstate
18%	International	5%	International

Users Non-users

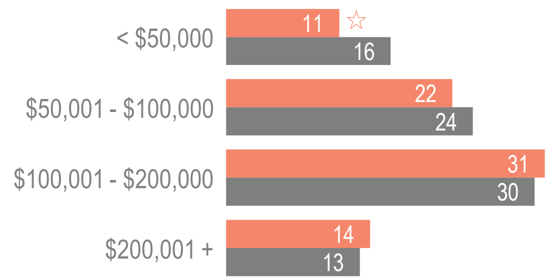
We're a similar age



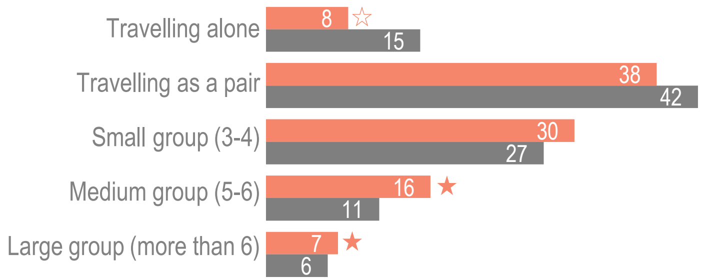
We are more likely to have kids living at home



We have slightly higher HH incomes (>$50k)

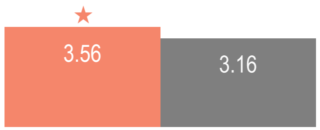


We are more likely to travel in a group

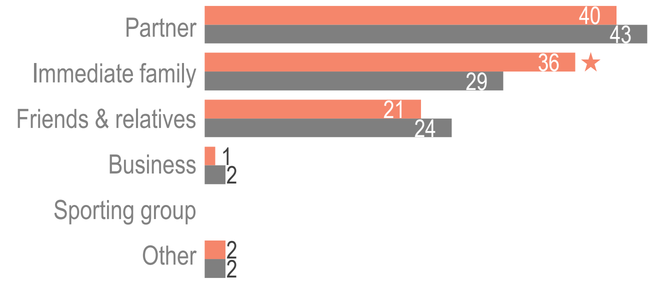


On average, we travel in groups of 3-4

Average travel party size (#)



We tend to travel with our partners and immediate family



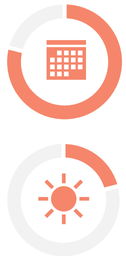
*Weighted data shown. *Note: Marrket proportions sum to <100% due to rounding.*

How we travel

Users Non-users

We're more likely to be first time visitors to our destinations

We tend to stay overnight in our destinations



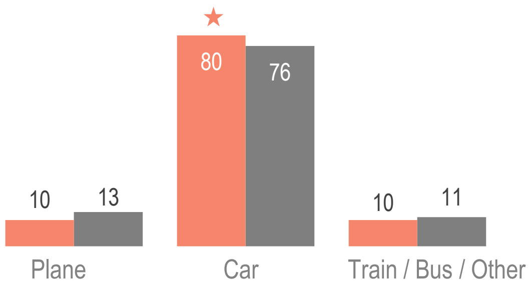
Overnight trip
79% Users ★
63% Non-Users

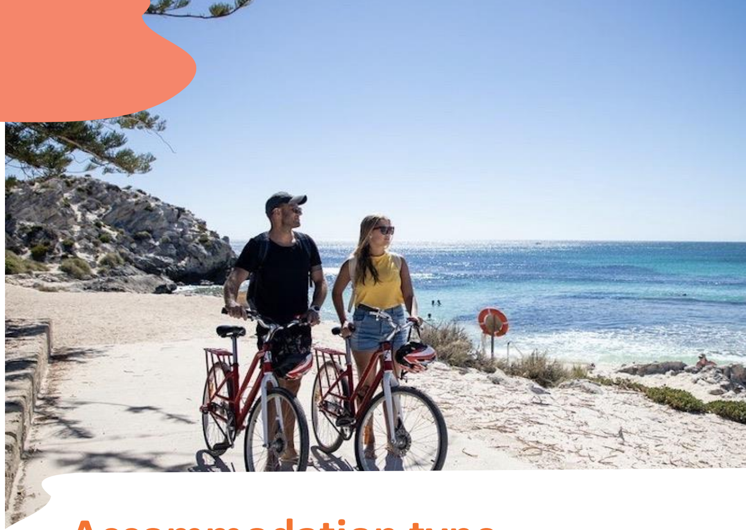
Day trip
21% Users ☆
37% Non-Users

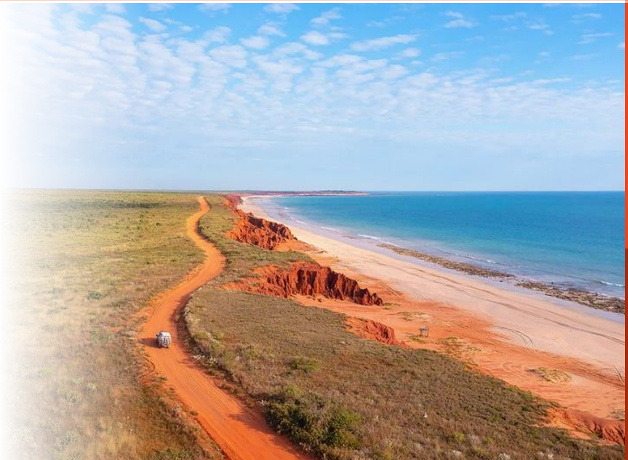
The majority of us travel for leisure

Holiday / leisure	77% Users ★	53% Non-Users
Visiting friends / family	7% Users ☆	19% Non-Users
Entertainment	6% Users ☆	12% Non-Users
Work	4% Users ☆	7% Non-Users
Sport	1% Users	1% Non-Users
Other	5% Users	8% Non-Users

We mostly travel by car within Western Australia







Accommodation type

Hotel / motel / room 51% users; 52% non-users

	User	Non-user
Rented / Airbnb / apartment	19% ★	14%
Standard hotel / motel / resort	13%	18% ★
Luxury hotel / 4-5 star resort	9%	10%
Serviced apartment	5%	4%
Guest house /B&B	3%	1%
Backpacker / hostel	1%	4% ★

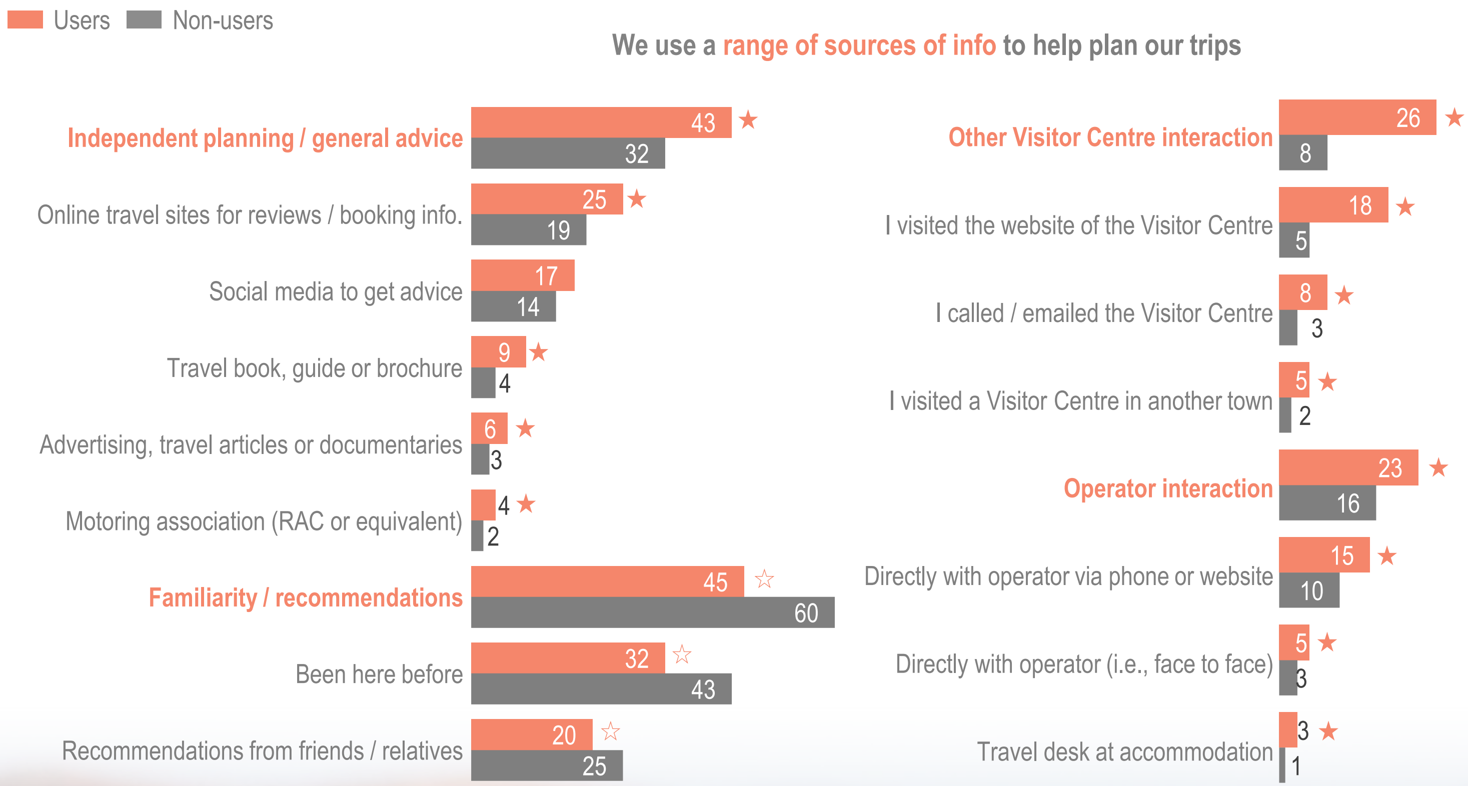
Camping / caravan 32% users ★; 20% non-users

	User	Non-user
Caravan park / staying in a caravan	13% ★	7%
Camping, caravan park	10% ★	5%
Cabin, caravan park	5%	4%

Friends & Relatives 10% users ; 20% non-users ★

Self-drive / informal 5% users; 4% non-users

How we plan our trips



 # Average Sources Used

Users: 2.04 ★

Non-users: 1.46

The profile of VC users differs by region, highlighting the diversity of travellers serviced by VCs in WA.

Developing this profile of VCs users by region is key to enhancing service delivery, relevance of information and tailoring recommendations that deliver on what travellers are seeking. These profiles also show where opportunities may exist to expand the reach and appeal of VCs, so a broader range of visitors to each region feels compelled to visit a VC.

Significantly lower *Significantly higher*

	Destination Perth	North West	Coral Coast	Golden Outback	South West
Age Bracket (%)					
18-34	26	41	44	21	24
35-54	38	25	46	33	41
55+	36	35	11	46	35
Household Structure (%)					
Single / Double Income (no children)	37	42	35	37	36
Young Families (eldest child ≤12)	17	18	34	11	17
Mature Families (eldest child ≥13)	20	17	21	24	22
Empty Nesters (children not at home)	21	22	8	25	23
Market (%)					
Intrastate	64	83	93	89	92
Interstate	20	11	3	7	4
International	16	5	4	4	4
Informational sources prior to trip (average number)					
Sources	1.9	2.5	2.15	2.01	1.83
Accommodation type (% among overnight users)					
NET: Hotel / Motel / Room	60	44	31	54	54
Rented or Airbnb house / apartment / unit	15	7	12	19	29
Standard hotel / motel / resort (< 4 star)	16	16	6	21	9
Luxury hotel / resort (4 or 5 star)	13	15	6	6	7
Serviced apartment	7	3	6	3	7
Guest house/bed and breakfast	6	1	0	6	2
NET: Camping / Caravan Park	22	33	50	29	27
Caravan park, travelling with a caravan	9	16	21	10	10
Caravan park, camping	7	5	21	8	8
Caravan park, cabin	5	5	3	6	6
NET: Self-drive/Informal	2	6	10	6	3
NET: Friends or relatives	10	11	7	10	11

S3. What is your age? D2. Which of these best describes your household? S6. Where do you live? S9. Which of these sources did you use to plan your trip? Base: Users, Destination Perth (n=386), North West (n=231), Coral Coast Users (n=147), Golden Outback (n=297), South West (n=411). Q8. What type of accommodation? Base: Overnight users DP (n=220), NW (n=221), CC (n=140), GO (n=279), SW (n=328).

Now, we want to take a closer look at the experience that travellers have at a VC

- Do VC users pre-plan to go into a centre?
- What are travellers seeking when they go into a VC? Do they receive this?
- Do they make bookings or extend their stay in town as a result of visiting the VC?

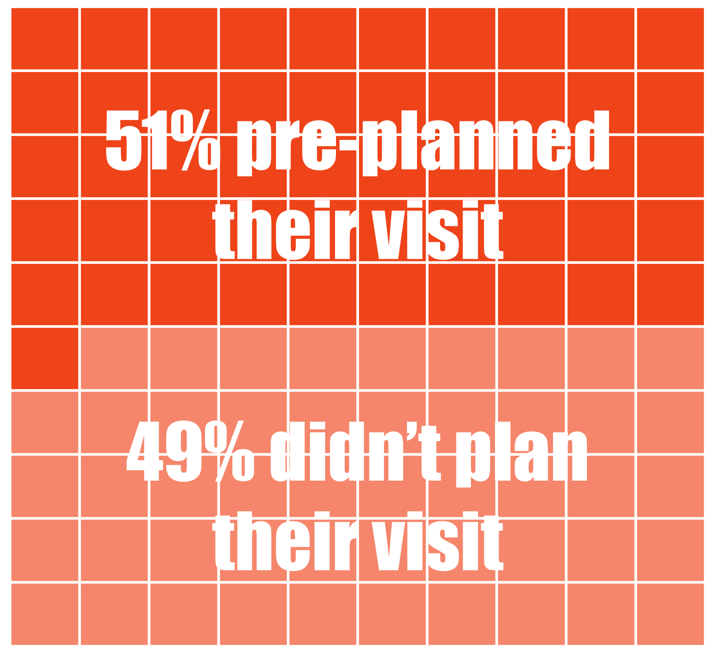
Around half of travellers who use a VC in WA pre-plan to visit the centre.

However, this means that for the other half of users, their visit to the VC was more spontaneous. This aligns with the finding that walking or driving by a VC is a major trigger to visit a centre among the general population.

The proportion of users pre-planning their visit is highest in the North West and Golden Outback, suggesting that VCs and their services are more salient/needed among travellers to these regions.

The Coral Coast and South West see the lowest proportion of planned visits, aligning with results that walking or driving-by VCs is a lead motivator for going in among travellers in these regions. In these regions, there is therefore an opportunity to further promote the VCs to increase pre-planned visits.

% Users who pre-planned to go into VC

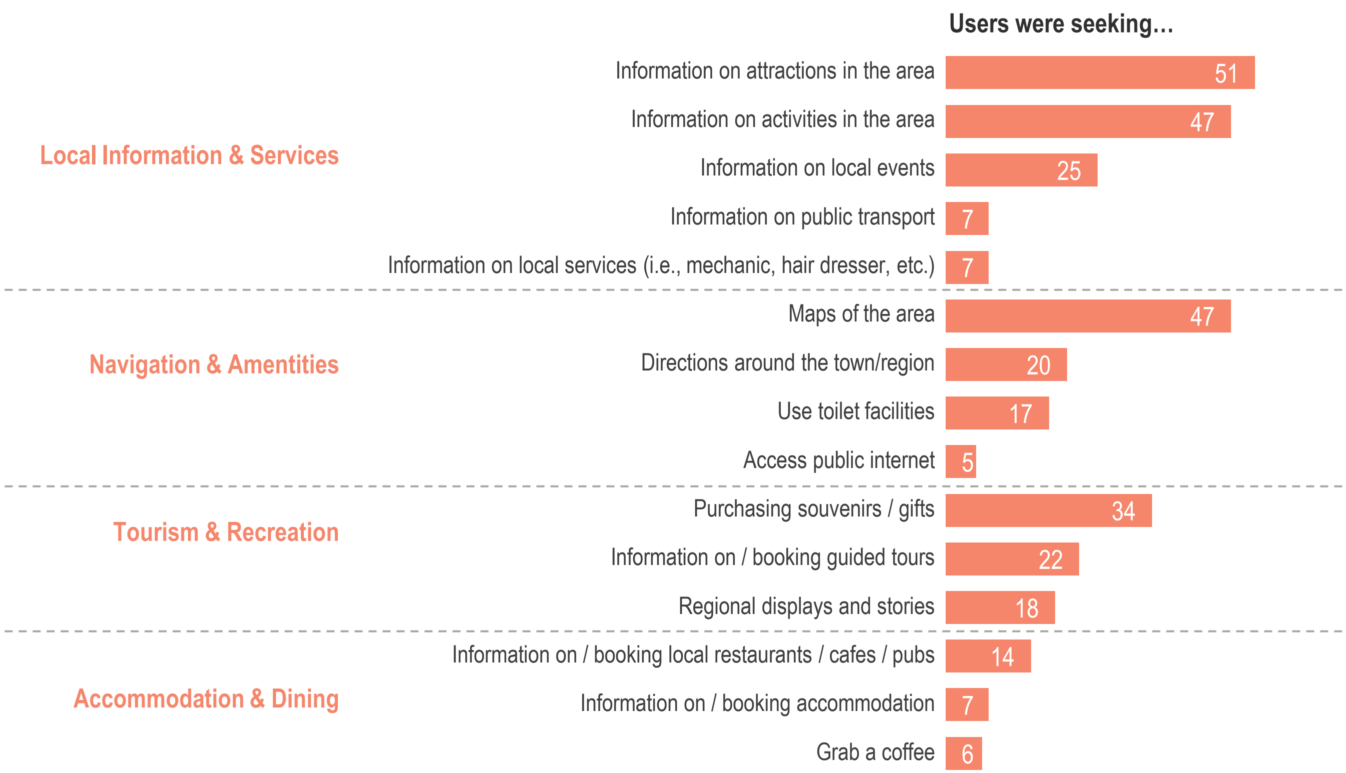


Destination Perth: **53%**
North West: **59%** ★
Coral Coast: **44%** ☆
Golden Outback: **61%** ★
South West: **45%** ☆

Q14. Did you pre-plan to [come/go] to the Visitor Centre in [LOCATION]? Base: All User Overall (n=1472).

While half of users may not plan their visit to the VC, they are all drawn in for a reason.

Users indicate that they come into a VC seeking a diverse range of information and services – but mainly information on local attractions, activities and for maps of the area.



Q15. What were you seeking when you entered the Visitor Centre? Base: Users (n=1472);.

The information and services that users end up receiving in the VC align closely with what they initially seek.

These results suggest that VCs are largely meeting expectations and delivering what travellers need them to. Conversion between the services sought and received reinforces this, with most services/information being delivered at or above expectations.

However, delivering information on local activities, local events, public transport and services, as well as showcasing regional displays and providing assistance with booking tours present the biggest opportunities for improvement – as not all users who were seeking these services or information ended up receiving them in the VC.

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.

More specifically, there are some gaps in each region, between what users were seeking and what they ultimately received from the VC.

These gaps are most apparent in the South West, were significantly fewer users received information on attractions and activities in the area compared to the proportion who were seeking this information. Similarly, fewer VC users ended up purchasing souvenirs and gifts relative to those going in for this purpose. These gaps (in all regions) suggest that there is an opportunity to better align the VC offerings with traveller expectations and needs – something that could improve satisfaction and intentions to return among future travellers.

Significantly lower *Significantly higher*

		Destination Perth		North West		Coral Coast		Golden Outback		South West	
		Sought	*Received*	*Sought*	*Received*	*Sought*	*Received*	*Sought*	*Received*	*Sought*	*Received*
Local Information & Services	Information on attractions in the area	49	49	61	53	41	42	67	59	48	40
	Information on activities in the area	46	41	46	43	43	37	48	43	48	37
	Information on local events	27	22	33	28	21	16	15	21	27	23
	Information on public transport	11	10	16	11	8	8	4	1	3	3
	Information on local services (i.e., mechanic, hair dresser, etc.)	6	5	14	17	13	6	6	3	5	4
Navigation & Utilities	Maps of the area	50	54	56	55	45	45	55	58	39	41
	Directions around the town/region	24	25	29	30	17	16	26	31	12	14
	Use toilet facilities	17	20	19	21	23	30	14	21	16	23
	Access public internet	3	5	14	12	10	9	4	3	1	3
Tourism & Recreation	Purchasing souvenirs / gifts	21	17	33	31	40	40	34	34	43	33
	Information on / booking guided tours	21	21	40	37	26	19	23	20	15	12
	Regional displays and stories	16	14	18	15	21	17	14	14	20	15
Accommodation & Dining	Information on / booking local restaurants/cafes/pubs/clubs	10	11	19	20	15	12	16	19	13	13
	Information on / booking accommodation	7	7	17	18	7	6	6	5	5	3
	Grab a coffee	6	5	9	10	7	12	8	11	4	5

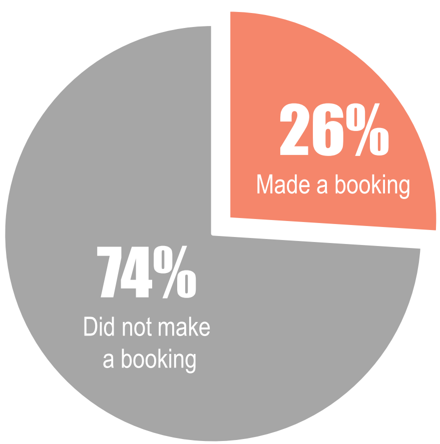
Q16. And what information or services did you end up using at the Visitor Centre? Base: Users, Destination Perth (n=386), North West (n=231), Coral Coast Users (n=147), Golden Outback (n=297), South West (n=411).

Further to this, 1 in 4 users make a booking while they're in a VC.

This proportion differs significantly by region, with 59% of North West VC users indicating that they made a booking while in centre. South West users by comparison see the lowest rate of bookings, potentially reflecting the misalignment between services sought and services received – which further highlights the opportunity to better meet the needs of these users.

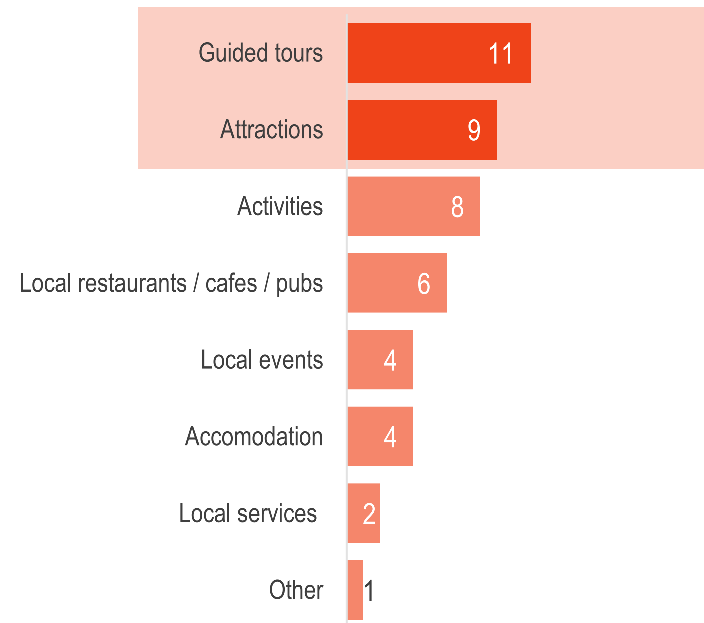
Guided tours and attractions are the two most common types of bookings made in all centres – with 1 in 10 of all who use a VC doing so for each.

% Users who made any booking



Destination Perth: **28%**
North West: **59%** ★
Coral Coast: **29%**
Golden Outback: **22%**
South West: **14%**

Bookings made
% among all users



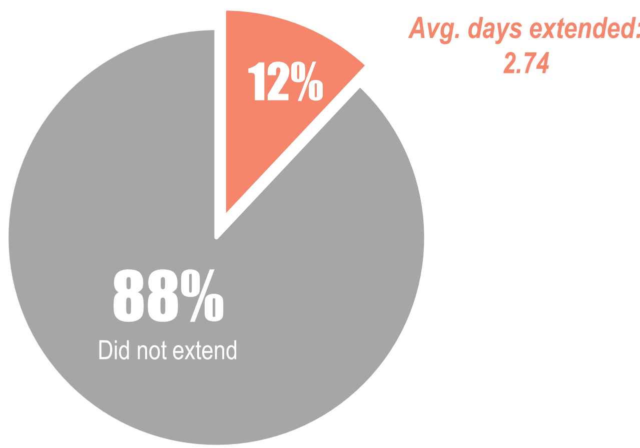
Q17. Did you make any bookings while you were in the Visitor Centre? Base: Visitor Centre users; Overall (n=1472)

Beyond making bookings, 1 in 10 users on overnight trips extend their stay in town as a result of their VC visit.

We know that more than 1.2 million overnight travellers used a WA VC in 2023 - so with these results, we can extrapolate this out to suggest that around 144,000 WA travellers extended their stay in town as a result of a VC in 2023.

Using the average of 2.74 extended days, this suggests that VCs played a role in extending stays in WA towns by 394,560 days**.**

% Users who extended their stay in town



Q20. As a result of visiting the [LOCATION] Visitor Centre, [are you going to (or did you)/did you] extend your stay in [LOCATION]? Base: Overnight VC users (n=1188)
Q21. By how many days did you extend you trip? Base: Overnight Visitor Centre who extended (n=162).

Are users of WA VCs satisfied with their experiences?

- Are those who use a VC satisfied with their visit to the centre? And does this influence their attitudes?
- How does VC usage relate to overall trip satisfaction?
- Would they recommend visiting the VC to other travellers in town?

Users agree that visiting a VC is an important part of their destination experience and perceptions.

% Users who agree (6-10/10)

89% ...of users agree that they know more about things to see and do in town, after going to the VC

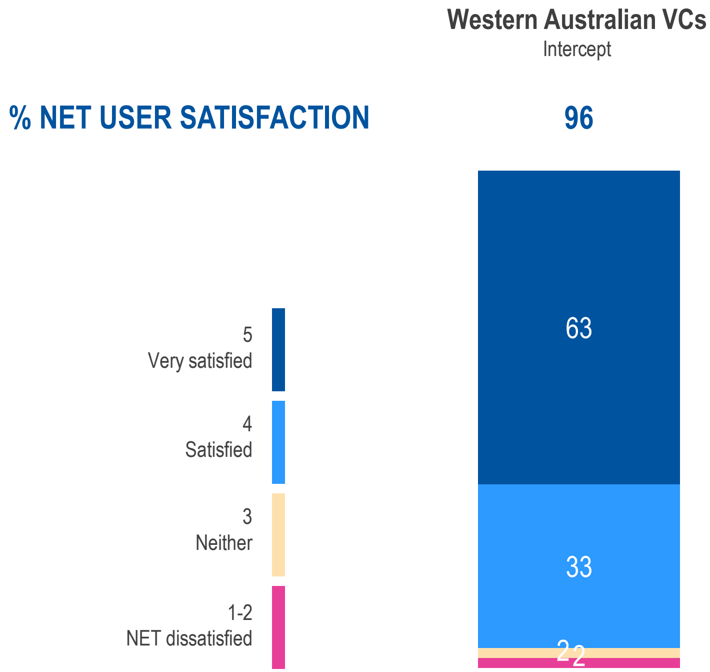
88% ...of users agree that a VC is an important part of their destination experience

82% ...of users agree that their VC experience positively influenced how they think about the destination

	Intrastate	*Interstate*	*International*
Know more about things to see and do in town, after going to the VC	89 ☆	94 ★	91
A VC is an important part of their destination experience	88	92 ★	82
VC experience positively influenced how they think about the destination	82	86 ★	78 ☆

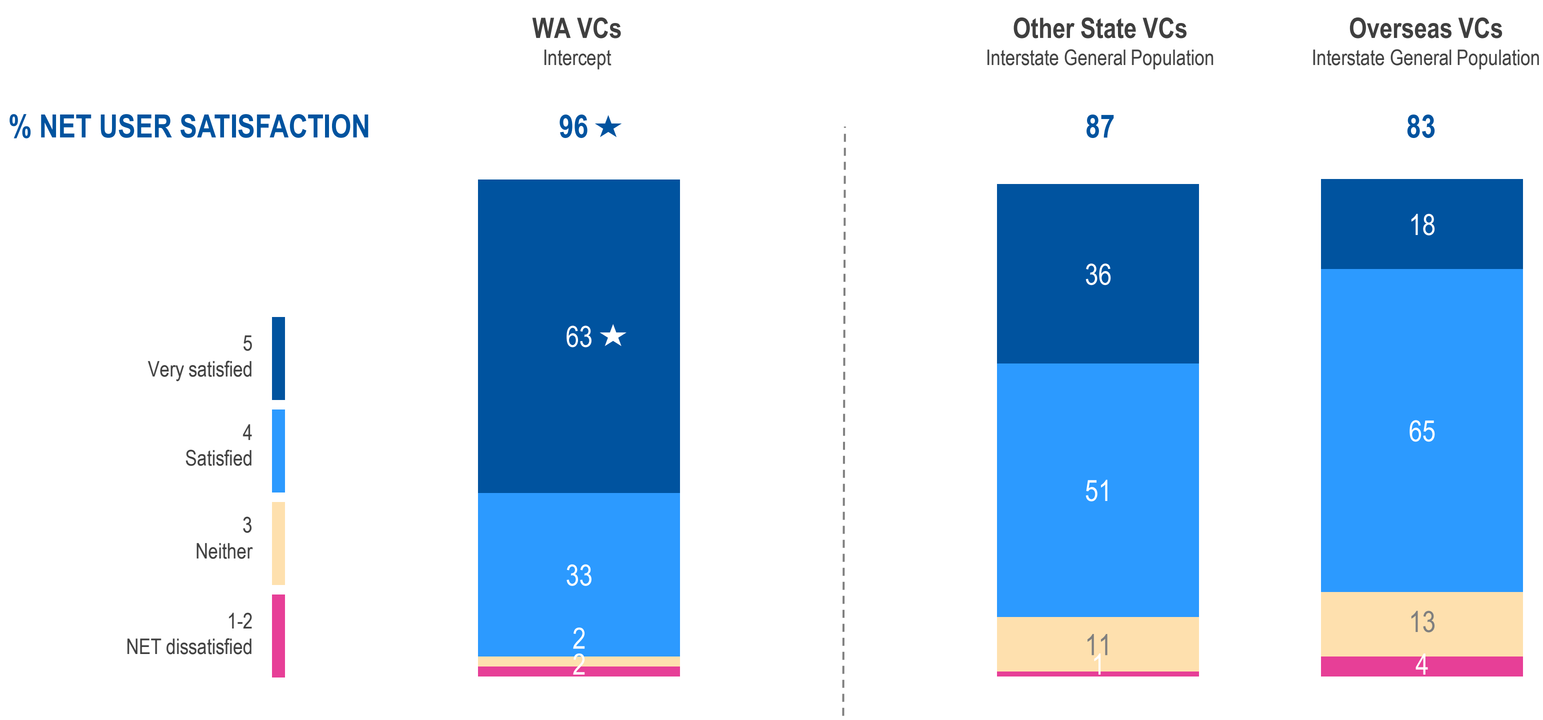
Q24. How strongly do you agree or disagree with the following statements? Base: Users (n=1472)

Almost all users are satisfied with their WA VC experience!



Q18. Overall, how satisfied or dissatisfied were you with your experience at the [LOCATION] Visitor Centre? Base: Users (n=1472).

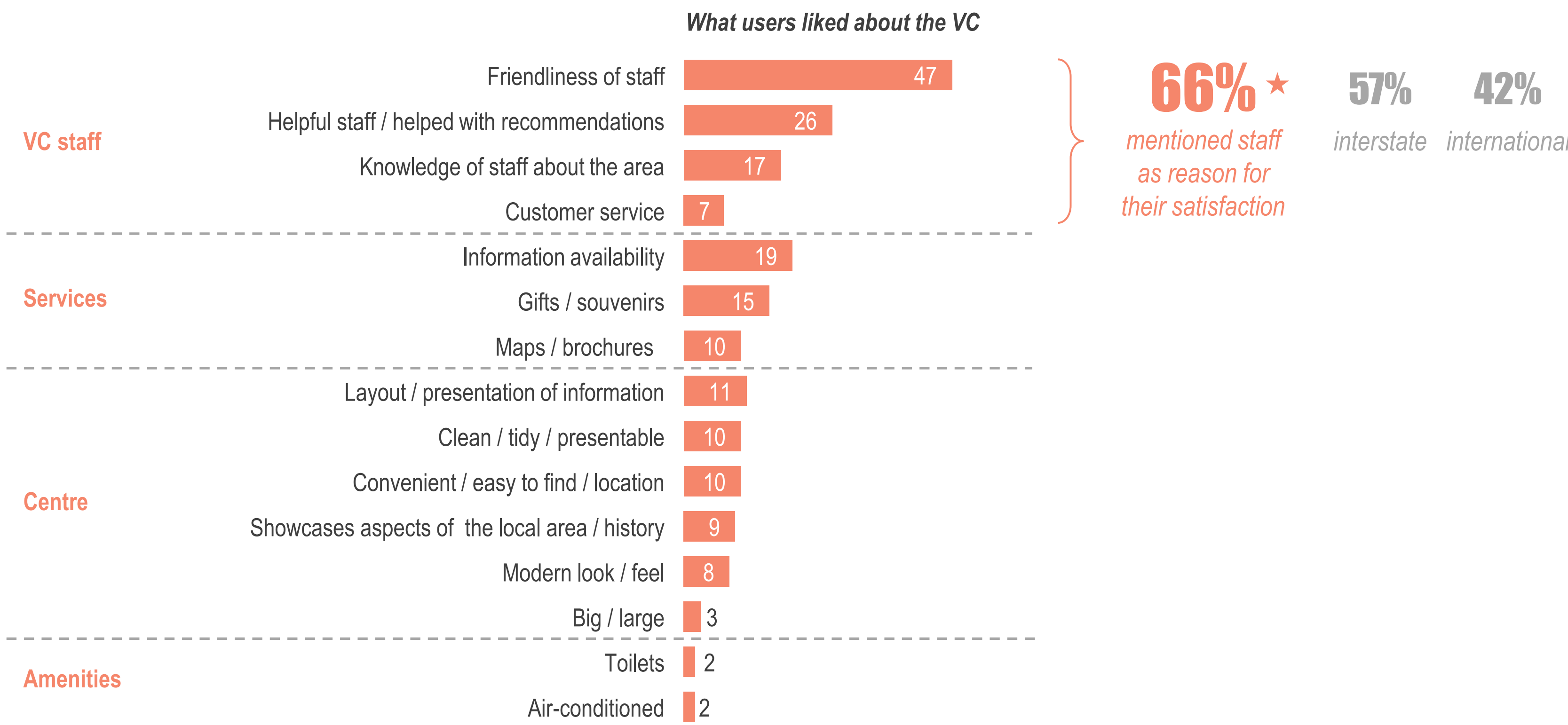
WA VCs outperform VCs in other states and overseas.



Q18. Overall, how satisfied or dissatisfied were you with your experience at the [LOCATION] Visitor Centre? Base: Intercepted WA VC users (n=1472); Q46. Overall, how satisfied or dissatisfied were you with your past experience/s at Visitor Centres outside of Western Australia? Base: Interstate General Population Survey; Used Other State VC but not an overseas VC in past 3 years (n=317), Used overseas VC but not other state (n=71).

WA VC users mention friendly and helpful staff as key reasons for their positive experiences.

Overall, 2 in 3 (66%) of satisfied VC users mentioned centre staff as a reason for their satisfaction – which is the main differentiator in satisfaction between WA VC users and those who have used other VCs.



Q19a. What did you like about the [LOCATION] Visitor Centre? Base: Those satisfied with experience at the [LOCATION] Visitor Centre (n=1472).

However, there are still opportunities to improve on VC user experiences.

This is most evident in the Coral Coast, where users are less likely than users in other regions to mention friendly and helpful staff and personalised recommendations – being instead more likely to mention just having their general informational needs met. Fewer users of VCs in the Golden Outback also tend to suggest modernity of the centre and the presentation of the information was a driver of their satisfaction.

Significantly lower *Significantly higher*

	Destination Perth	North West	Coral Coast	Golden Outback	South West
	Reasons for Satisfaction with VC (% mention)				
Friendly / helpful staff	47	49	29	44	54
Recommendations	30	35	14	31	22
Had what I needed / info	13	19	25	18	20
Maps / brochures	10	10	6	15	9
Modernity and design	9	1	15	6	9
Presentation of info	8	12	16	5	10
Gifts / souvenirs	8	9	12	8	28
Displays	7		26	3	10

Q19b. What did you like about the visitor centre? Base: Users, Destination Perth (n=386), North West (n=231), Coral Coast Users (n=147), Golden Outback (n=297), South West (n=411).

Satisfied VC users

In their own words

Q19a. What did you like about the [LOCATION] Visitor Centre? Base: Those satisfied with experience at the [LOCATION] Visitor Centre (n=1472)

Only a handful of WA VC users felt there was room for improvement…

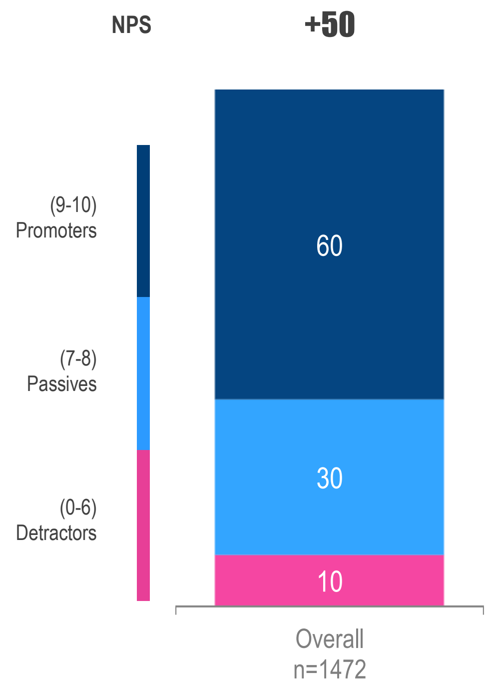
In their own words

Q19b. How could the [LOCATION] Visitor Centre be improved? Base: Dissatisfied users (n=32).

As a result of these experiences, users are highly likely to recommend the VC to other visitors to the area.

Among users, 60% are strong advocates of the VC they went to and would be extremely likely to recommend a visit.

This is particularly positive, as we know the importance placed on personal recommendations as a source of information when planning a trip (particularly among those who didn't use a VC, who are *significantly* more likely to rely on recommendations when planning a trip).



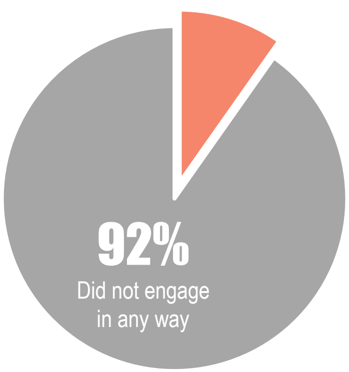
Q22. Thinking about your experience, how likely are you to recommend this Visitor Centre to other people visiting [LOCATION]? Base: VC Users (1472)

What about those who don't physically enter a VC, but engage with it in other ways?

- What other ways are people interacting with a VC?
- What information are they seeking from the VC when interacting?
- How do interactors feel towards VC and their services?
- Why don't interactors physically enter into a VC for information? Is there something missing?

Around 1 in 10 who don't go into a VC still engage with the centre in another way – predominantly online.

% who engage with VCs in another way
among those who didn't visit in-person



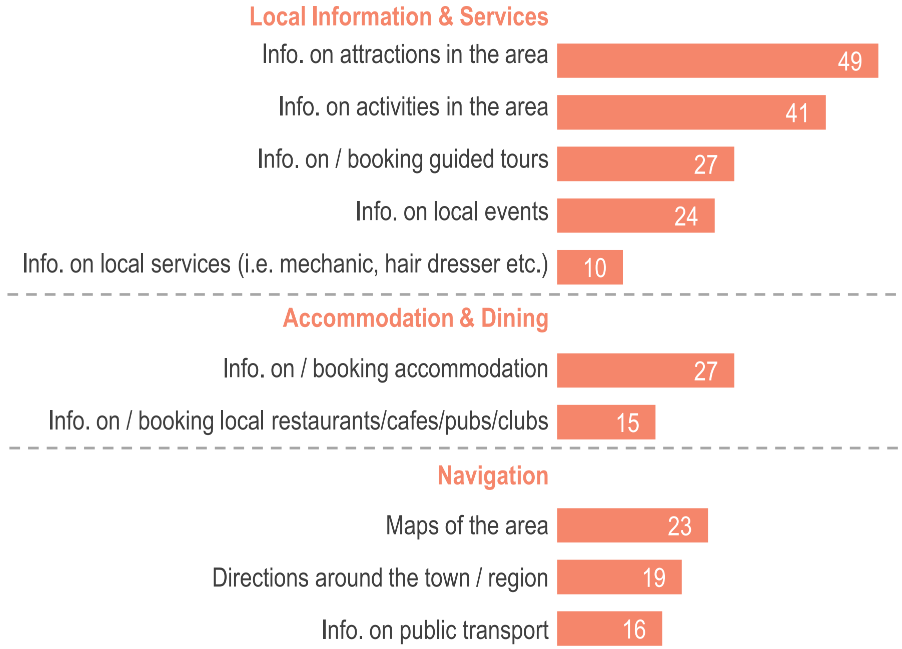
8%
Interactors

5% Visited the VC website

2% Called the VC

1% Emailed the VC

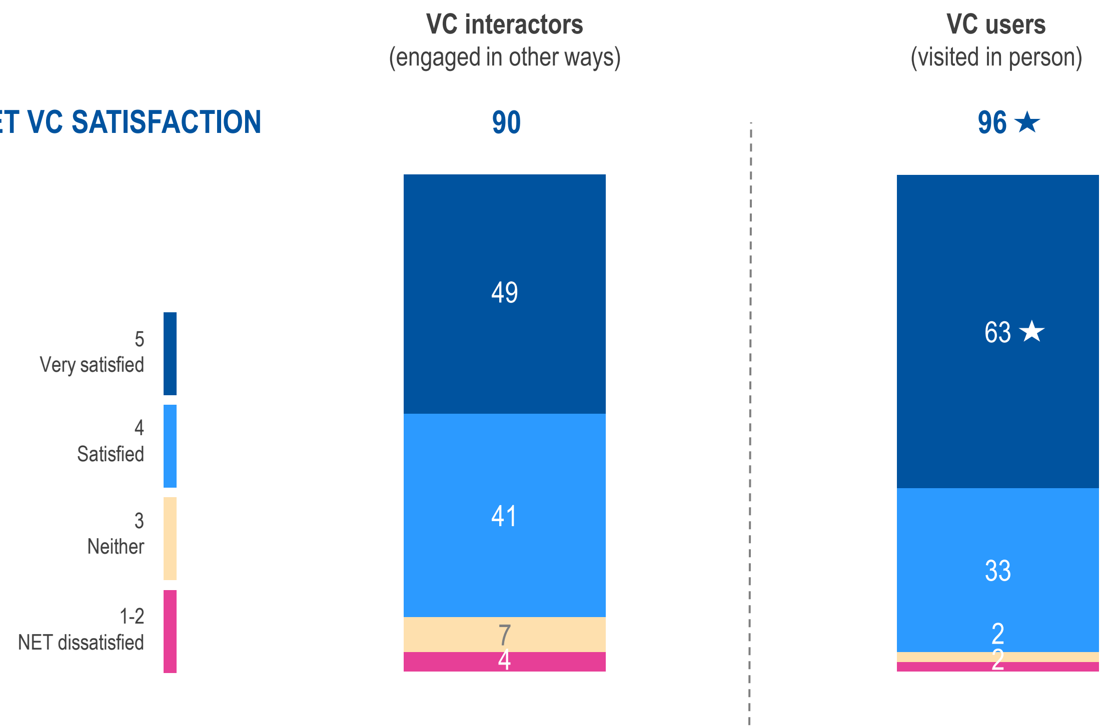
Information / services received from VC



Q11. And on [this/your most recent] visit, [have you been/did you go] into the Visitor Centre in [LOCATION]? / Q9. Which of these sources did you use to obtain information or make bookings for this trip to [LOCATION]? Base: Non-users (n=1417), Interactors (n=115). Q39. You mentioned that you interacted with the [LOCATION] Visitor Centre (i.e., called, emailed or visited the website) but [have not visited / did not visit] the Visitor Centre in person. What information or services did you receive from your interaction with the Visitor Centre? Base: Interactors (n=115).

The majority of those who have interacted with a VC are still satisfied with their experience...

...however they are *less* highly satisfied than those who visited a VC in-person during their trip.

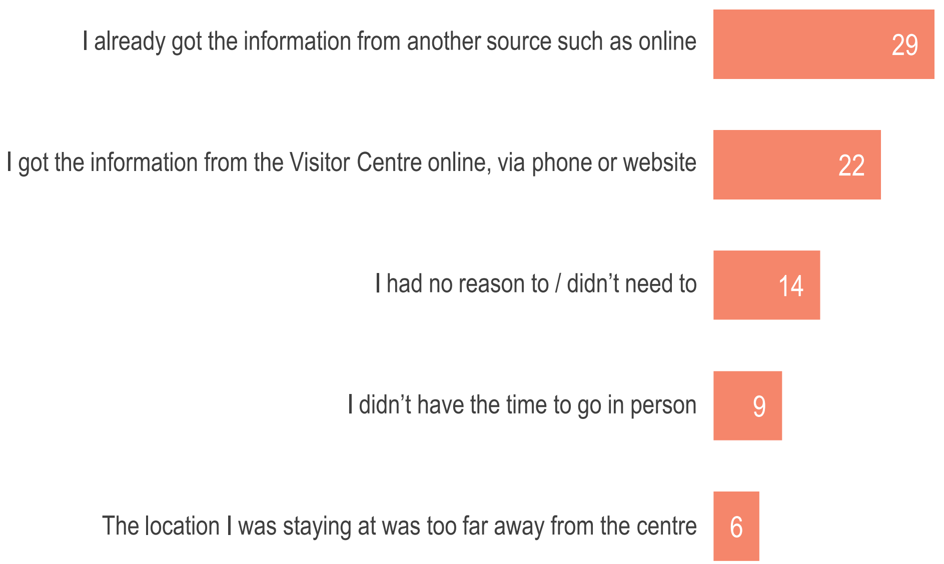


Q18. Overall, how satisfied or dissatisfied were you with your experience at the [LOCATION] Visitor Centre? Base: Users (n=1472).
Q40. Overall, how satisfied or dissatisfied were you with your interaction/s with the [LOCATION] Visitor Centre? Base: Interactors (n=115).

Their main reason for not visiting the VC in-person was the helpfulness of the staff online or over the phone.

This demonstrates that while satisfaction is slightly lower among those who engage with a VC (but not in-person), they are still receiving excellent service – so much so that visiting in-person is not required. But, as we know that satisfaction further increases with in-person visits, this is something that staff could encourage when interacting with visitors remotely (by phone or online).

Top reasons unlikely to visit s VC in-person
% among interactors



Q42. You mentioned that you interacted with the [LOCATION] Visitor Centre, but that you [don't plan on visiting/did not visit] in person. Why is that? Base: Interactors (n=115).

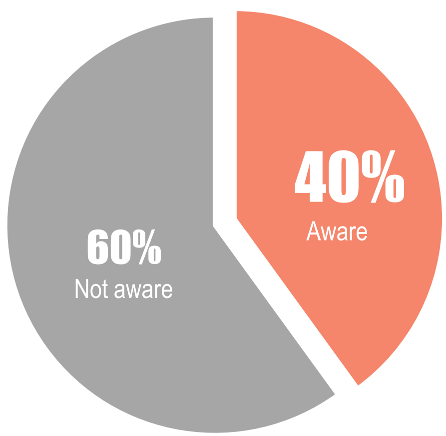
And what about those that didn’t visit a VC while travelling in WA?

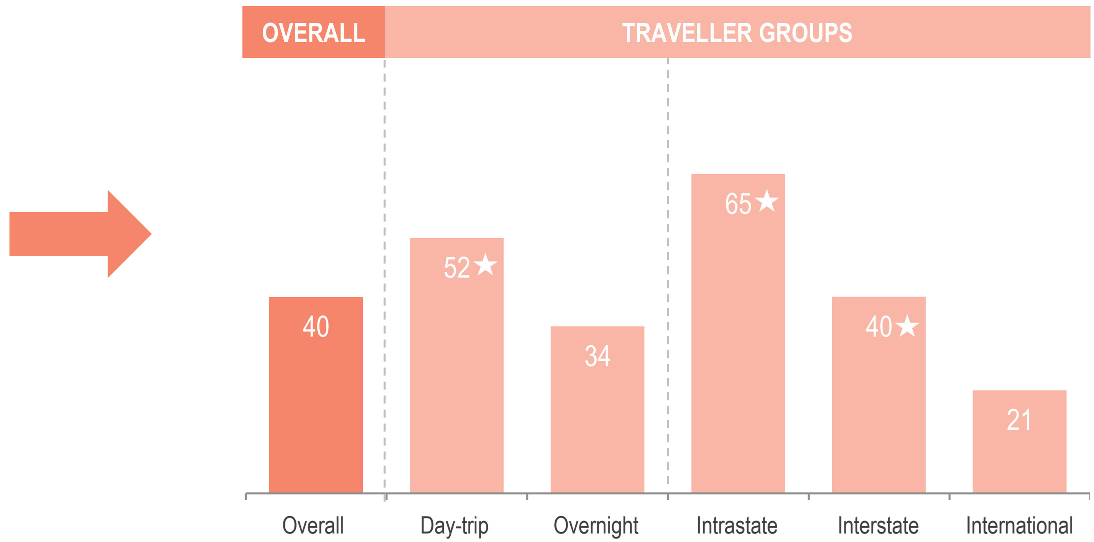
- Were they aware there was a VC in town?
- Beyond awareness, what were their reasons for not visiting?
- What could a VC offer that would encourage them to visit next time they’re in town?

Among those who didn't use a VC, awareness is a key barrier to their engagement.

Just 40% of non-users were aware of the VC in the town they were visiting – which was lowest among those staying overnight and international travellers.

% Non-users aware of the VC





Q25. Before now, did you know there is a Visitor Centre in [LOCATION]? Base: Non-Users who didn't interact with w VC prior to their trip (n=1,360).

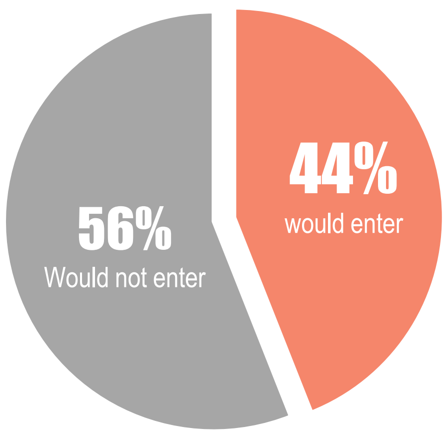
Aside from a lack of awareness, prior familiarity with the location and already being well-researched were key reasons for not using the VC.

Around 2 in 5 claim to be already familiar with the town (and therefore don't see the need to visit the VC) and a further 1 in 4 had planned their trip prior to arriving in town and already had sought all the information they needed.

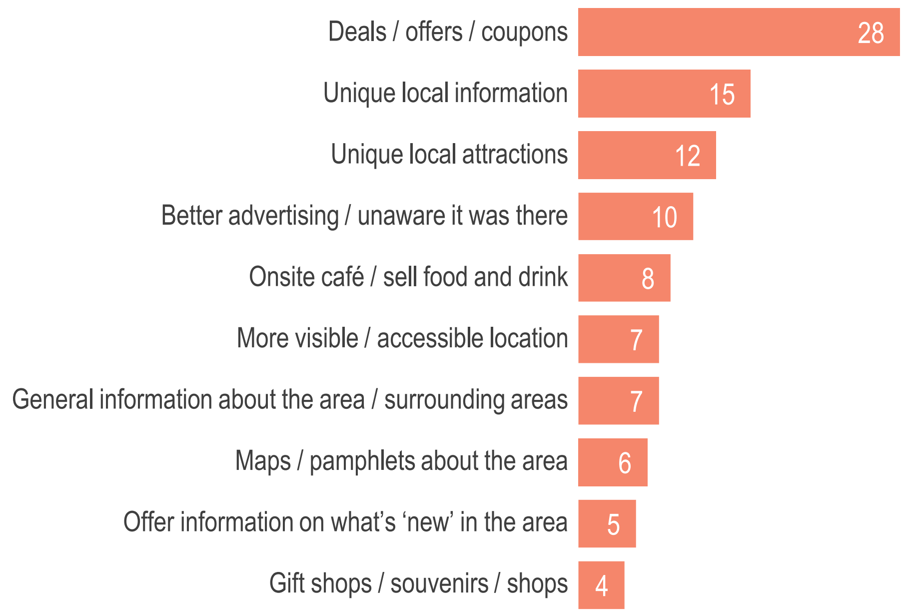
Q26. Why didn't you visit the Visitor Centre in [LOCATION]? Base: Non-Users that are aware of Visitor Centre (n=782)

Just under half of non-users would be likely to enter a VC if they happened to go past it – with coupons or deals the biggest drawcard.

% Would go into the VC if they happened to go past



Strategies to encourage VC usage
% non-users mentioned



Q27. Would you (go / have gone) to the Visitor Centre if you happened to go past it? Base: Non-users (n=1417).
Q28. What would the Visitor Centre in [LOCATION] need to offer to encourage you to visit it next time? Base: Non-users (n=1417)

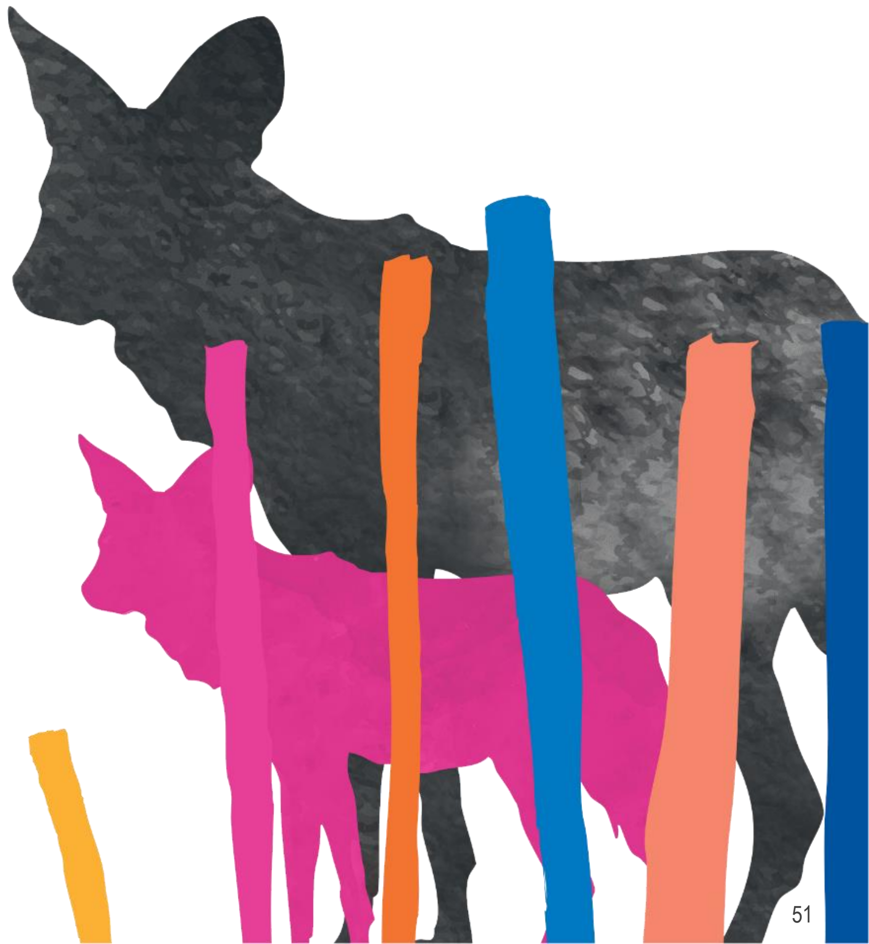
VCs in each region each have unique challenges and opportunities to attract more travellers to use their services.

Awareness of VCs among non-users is lowest in Destination Perth at 46%, being highest among non-users in the South West. However familiarity with the area is a leading barrier and reason for not using a VC among visitors to the South West – suggesting that to increase visitation, something more unique or valuable would need to be offered at this VC to draw people in.

Destination Perth	North West	Coral Coast	Golden Outback	South West
Awareness of VC in Region (% among those who did not go into the VC)				
46%	63%	67%	67%	81%
Top Reasons for Not Visiting (% mentions among those aware of VC)				
○ Familiar with area (35%) ○ Got info elsewhere (27%) ○ Didn't need to (18%) ○ Friends/family in the area (12%) ○ Short / day trip (6%)	○ Got info elsewhere (29%) ○ Familiar with area (24%) ○ Didn't need to (17%) ○ Too busy / no time (11%) ○ Friends/family in the area (9%)	○ Familiar with area (31%) ○ Got info elsewhere (22%) ○ Didn't need to (14%) ○ Too busy / no time (9%) ○ Got info from another VC / email / phone / previous trip (9%)	○ Familiar with area (35%) ○ Got info elsewhere (34%) ○ Didn't need to (16%) ○ Friends/family in the area (8%) ○ On a work trip (7%)	○ Familiar with area (46%) ○ Got info elsewhere (23%) ○ Didn't need to (16%) ○ Friends/family in the area (8%) ○ Short / day trip (7%)
Top Factors that Would Encourage Future Usage (% mentions)				
○ Deals / offers / discounts (27%) ○ Not to be missed attractions (15%) ○ Unique local recommendations not available elsewhere (12%) ○ Advertising / was unaware (11%) ○ More visible / accessible location (10%)	○ Deals / offers / discounts (27%) ○ Advertising / was unaware (17%) ○ General information on area (10%) ○ More visible / accessible location (10%) ○ Onsite café / food / drinks (9%)	○ Deals / offers / discounts (21%) ○ Unique local recommendations not available elsewhere (19%) ○ Information on 'what's new' (14%) ○ Advertising / was unaware (14%) ○ More visible / accessible location (9%)	○ Unique local recommendations not available elsewhere (21%) ○ Deals / offers / discounts (17%) ○ Advertising / was unaware (12%) ○ Awareness of services / 'what can it do for me?' (8%) ○ Not to be missed attractions (7%)	○ Deals / offers / discounts (38%) ○ Unique local recommendations not available elsewhere (20%) ○ Not to be missed attractions (13%) ○ Onsite café / food / drinks (11%) ○ Information on 'what's new' (7%)

Q25. Base non-users Destination Perth (n=611), North West (n=185), Coral Coast Users (n=68), Golden Outback (n=119), South West (n=120). Q26. Why did you not visit? Q28. What would the VC have to do to encourage you to go in next time? Base: non-users who provided a suggestion: Destination Perth (n=369), North West (n=119), Coral Coast Users (n=46), Golden Outback (n=75), South West (n=140).

Understanding the Influence of VCs



What influence does usage of a VC have on a traveller's behaviour?

- Do those who use a VC spend different amounts on their trips?
- Does their length of stay differ, compared to those who don't use a VC?
- Do they participate in different activities? And what *direct* influence does their visit to the VC have on what they choose to do in town?
- Do their visits meet or exceed expectations, more so than those who don't use a VC?

Travellers who use a VC take longer trips in WA and spend more, compared to non-users.

While those who use a VC spend a comparable amount per person, per night on food, transport and souvenirs, their total trip spend per person on tours, attractions and other activities is significantly higher.

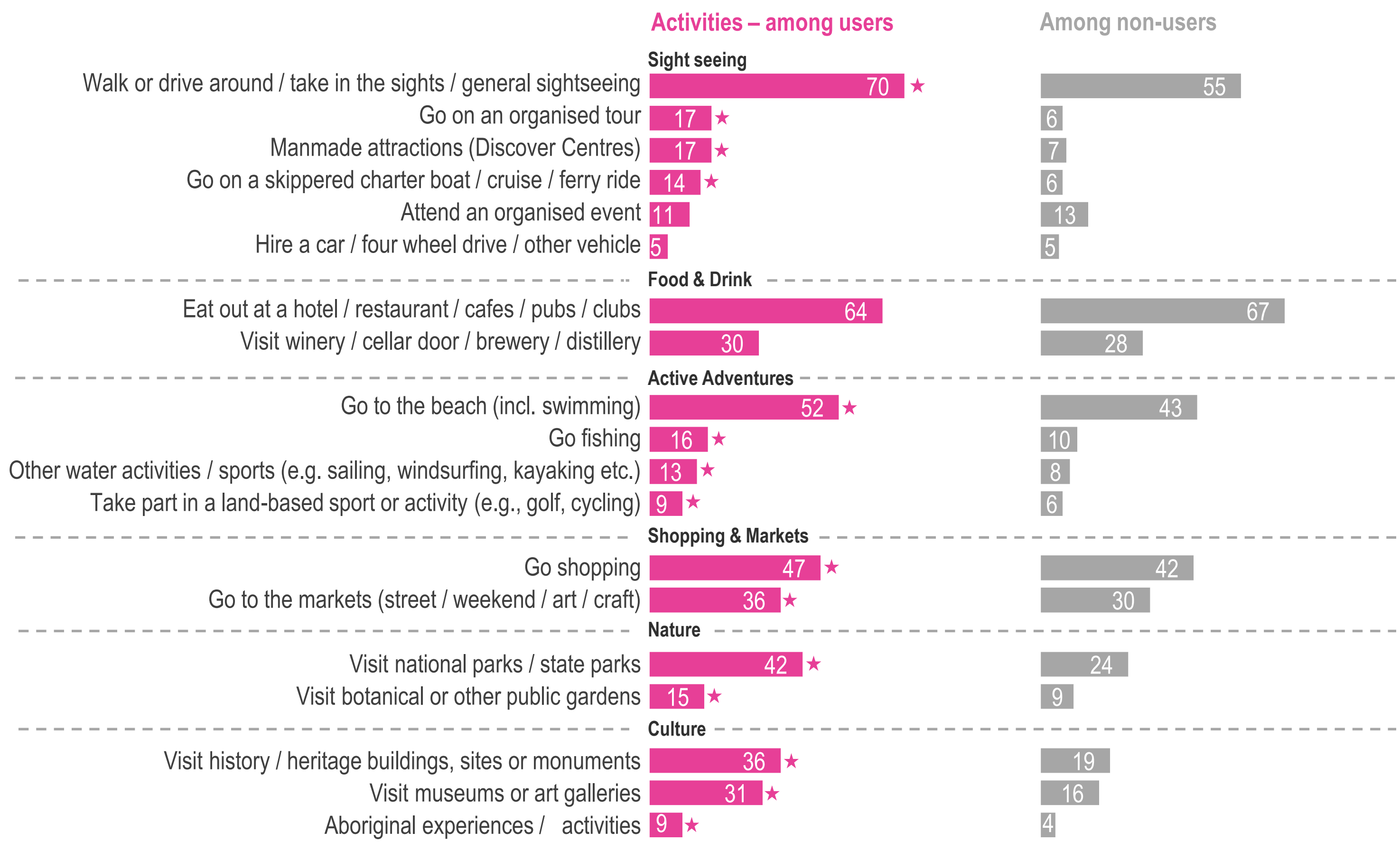
This not only demonstrates that VCs *service* High Yield Travellers in WA, but signals that those who visit are VC are likely *influenced* to participate in more paid-for activities while on their trip – but let's confirm that!

Among overnight travellers…	Users	Non-users
Avg. travel party size (#)	3.52	3.13
Avg. trip length (days)	5.64 ★	4.87
Avg. total trip spend per person	$2,905.92★	2,179.34
	Spend per person (per night)	
Spend on accommodation	$185.56	$167.07
Spend on food & drink	$116.07	$119.47
Spend on transport	$58.83	$60.94
Spend on souvenirs	$51.80	$39.77
	Spend per person (whole trip)	
Spend on tours	$76.60 ★	$36.67
Spend on attraction entrance fees	$26.01 ★	$17.04
Spend on other tourist activities	$34.41 ★	$22.62

Q3. How many other people [are/were] travelling with you on this trip? Q5. What [is/was] the total length of your stay in [LOCATION Q32. How much do you estimate that you [have] spent on an average day during your time in [LOCATION], on each of the following? And how many people did / will that cost cover? Q33. Now thinking about your entire stay in [LOCATION], how much [have you spent or plan to spend/did you spend] on each of the following? And how many people did / will that cost cover? Overnight users (n=1,159), non-users (n=780).

VC users do engage in more activities – both paid and unpaid.

On average, they participate in 5+ activities during their stay in town, whereas those that don't visit a VC participate in around 4. This is consistently seen among both day-trippers and overnight travellers.



 # Average Activities

Users: 5.35 ★

Non-users: 3.97

Among Day Trips

Users: 3.37 ★

Non-users: 2.65

Among Overnight

Users: 5.88 ★

Non-users: 4.76

Q29. On this visit to [LOCATION], which of the following activities [have you already undertaken, or intend to/did you undertake] while you [are here/were there]? Base: All Users (n=1472); Non-users (n=1285)

But this isn't just because VC users have longer stays and like doing more – their visit to the VC is driving this!

% users	Activities done	Found out from VC	Decided on/booked as a result of VC
Sight seeing			
Walk or drive around / take in the sights / general sightseeing	70	22	13
Go on an organised tour	17	14	8
Manmade attractions (Discover Centres)	17	13	6
Go on a skippered charter boat / cruise / ferry ride	14	10	6
Attend an organised event	11	8	4
Hire a car / four wheel drive / other vehicle	5	3	1
Food & Drink			
Eat out at a hotel / restaurant / cafes / pubs / clubs	64	21	13
Visit winery / cellar door / brewery / distillery	30	17	9
Active Adventures			
Go to the beach (incl. swimming)	52	15	9
Go fishing	16	6	3
Other water activities / sports (e.g. sailing, windsurfing, kayaking etc.)	13	7	2
Take part in a land-based sport or activity (e.g., golf, cycling)	9	5	3
Shopping & Markets			
Go shopping	47	9	4
Go to the markets (street / weekend / art / craft)	36	17	10
Nature			
Visit national parks / state parks	42	24	15
Visit botanical or other public gardens	15	9	4
Culture			
Visit history / heritage buildings, sites or monuments	36	23	13
Visit museums or art galleries	31	22	12
Aboriginal experiences / activities	9	9	4

# Average Activities *Among users*	
Activities done	5.35
Activities found out about at VC	2.55
Activities decided on/booked at VC	1.40

Q29. On this visit to [LOCATION], which of the following activities [have you already undertaken, or intend to/did you undertake] while you [are here/were there]? Base: All Users (n=1472)
Q30. Which of these activities did you find out about from the Visitor Centre? Q31. And which of these did you organise, book or decide to do, as a result of going to the Visitor Centre? Base: All Users (n=1472). *proportion of users who decided on activity after finding out about them from the VC.

This is demonstrated when looking at the conversion between finding out and deciding on as a result of VCs.

% users	Activities done	Found out from VC	Conversion	Decided on/booked as a result of VC
Sight seeing				
Walk or drive around / take in the sights / general sightseeing	70	22	60%	13
Go on an organised tour	17	14	62%	8
Manmade attractions (Discover Centres)	17	13	44%	6
Go on a skippered charter boat / cruise / ferry ride	14	10	55%	6
Attend an organised event	11	8	45%	4
Hire a car / four wheel drive / other vehicle	5	3	44%	1
Food & Drink				
Eat out at a hotel / restaurant / cafes / pubs / clubs	64	21	62%	13
Visit winery / cellar door / brewery / distillery	30	17	54%	9
Active Adventures				
Go to the beach (incl. swimming)	52	15	59%	9
Go fishing	16	6	53%	3
Other water activities / sports (e.g. sailing, windsurfing, kayaking etc.)	13	7	30%	2
Take part in a land-based sport or activity (e.g., golf, cycling)	9	5	57%	3
Shopping & Markets				
Go shopping	47	9	49%	4
Go to the markets (street / weekend / art / craft)	36	17	59%	10
Nature				
Visit national parks / state parks	42	24	64%	15
Visit botanical or other public gardens	15	9	44%	4
Culture				
Visit history / heritage buildings, sites or monuments	36	23	57%	13
Visit museums or art galleries	31	22	55%	12
Aboriginal experiences / activities	9	9	43%	4

Q29. On this visit to [LOCATION], which of the following activities [have you already undertaken, or intend to/did you undertake] while you [are here/were there]? Base: All Users (n=1472)
Q30. Which of these activities did you find out about from the Visitor Centre? Q31. And which of these did you organise, book or decide to do, as a result of going to the Visitor Centre? Base: All Users (n=1472). *proportion of users who decided on activity after finding out about them from the VC.

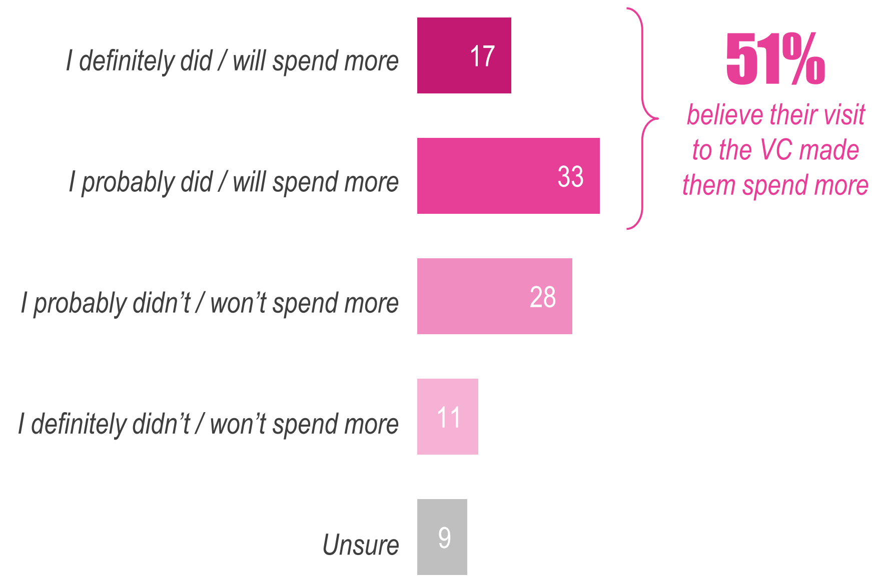
Around 1 in 2 feel their visit to the VC influenced them to spend more on their trip – averaging $179 more.

While this stated additional spend does have some limitations (people are typically not great at fully considering these sorts of influences on their spend), it is still indicative that around half of those who use a VC end up spending more on their trip than they may have otherwise.

$ users directly attribute to VC*

	User spend
*Avg. spend on **bookings** made at the VC*	$85.30
*Avg. spend on **items** bought at the VC (e.g. souvenirs)*	$33.66
*Avg. spend on other **things you found out about** from the VC (e.g. attractions)*	$59.95
AVG. TOTAL SPEND ATTRIBUTABLE TO VC	$178.91

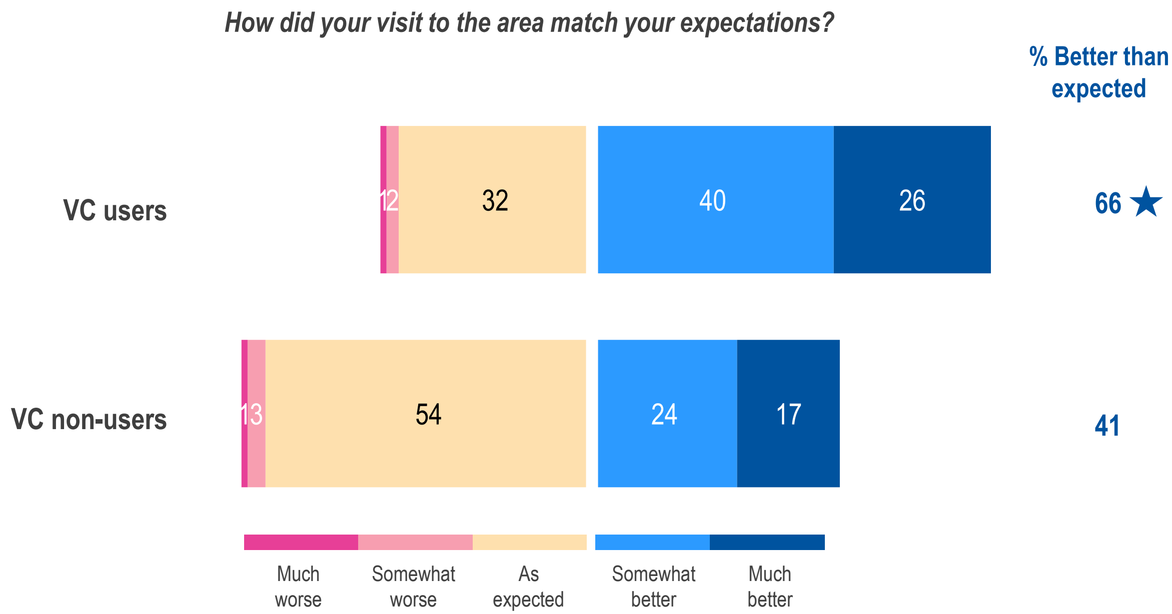
% users who think they spent more as a result of visiting the VC



Q34. How much did you spend as a direct result of visiting the [LOCATION] Visitor Centre? Base: All users (n=1472). Q35. How likely are you to/Did you] spend more during your stay in [LOCATION] as a result of visiting the Visitor Centre? Base: All users (n=1472). **Avg. spend calculated across all users, including those who attributed no spend to VCs*

Not only do VC users spend and do more, but they are also more likely to say their trip exceeded expectations!

Significantly more users agree that their trip was better than expected, while the majority of those who didn't visit a VC were likely to say their trip was as they expected. This again demonstrates that visits to VCs help to enhance experiences for and bring value to travellers in WA.



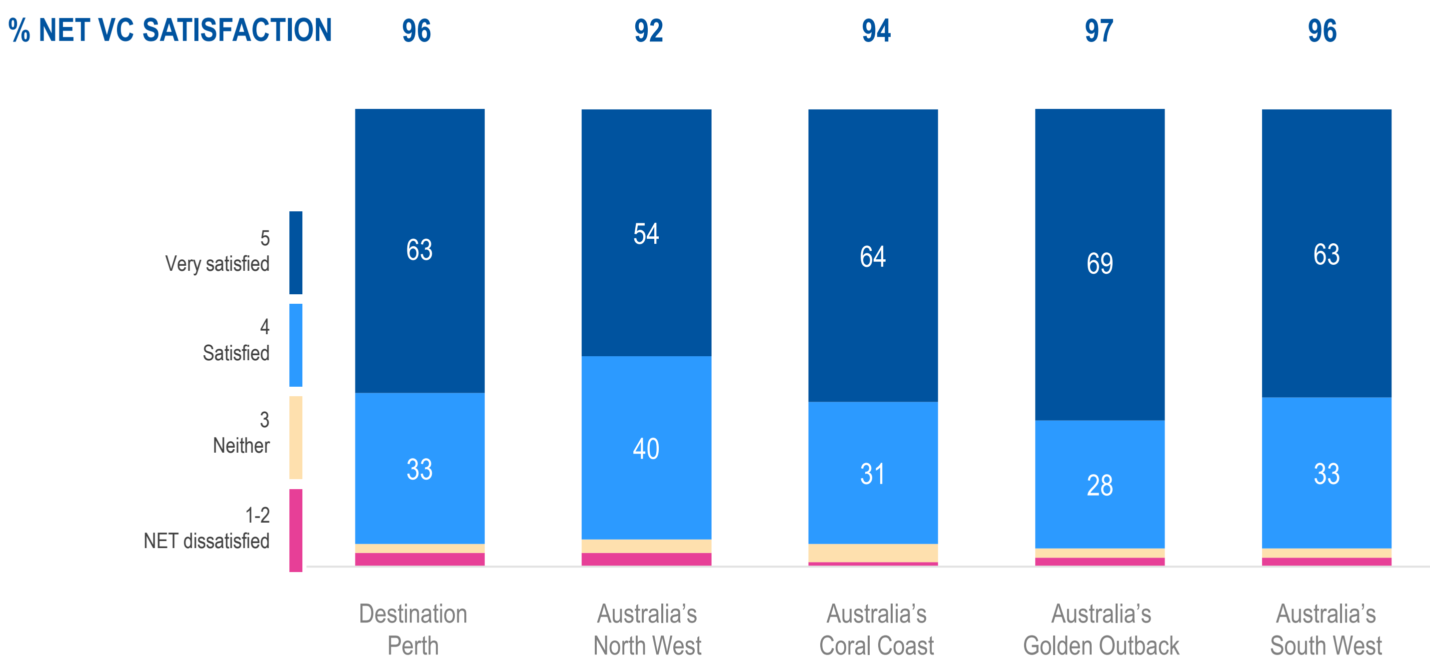
Q36. How [has/did] your visit to [LOCATION] [matched/match] your expectations? Base: Users Overall (n=1472), Non-users (n=1285).

What influence are VCs having on travellers across WA's regions?

- How satisfied are users of VCs across the state? Would they each recommend the VC to other visitors?
- By each region, what are the differences between users' and non-users' trip lengths and what they do while in town?
- Do users spend more than non-users in each region?
- Does a visit to a VC help to improve how well a trip meets expectations, for travellers to each region?

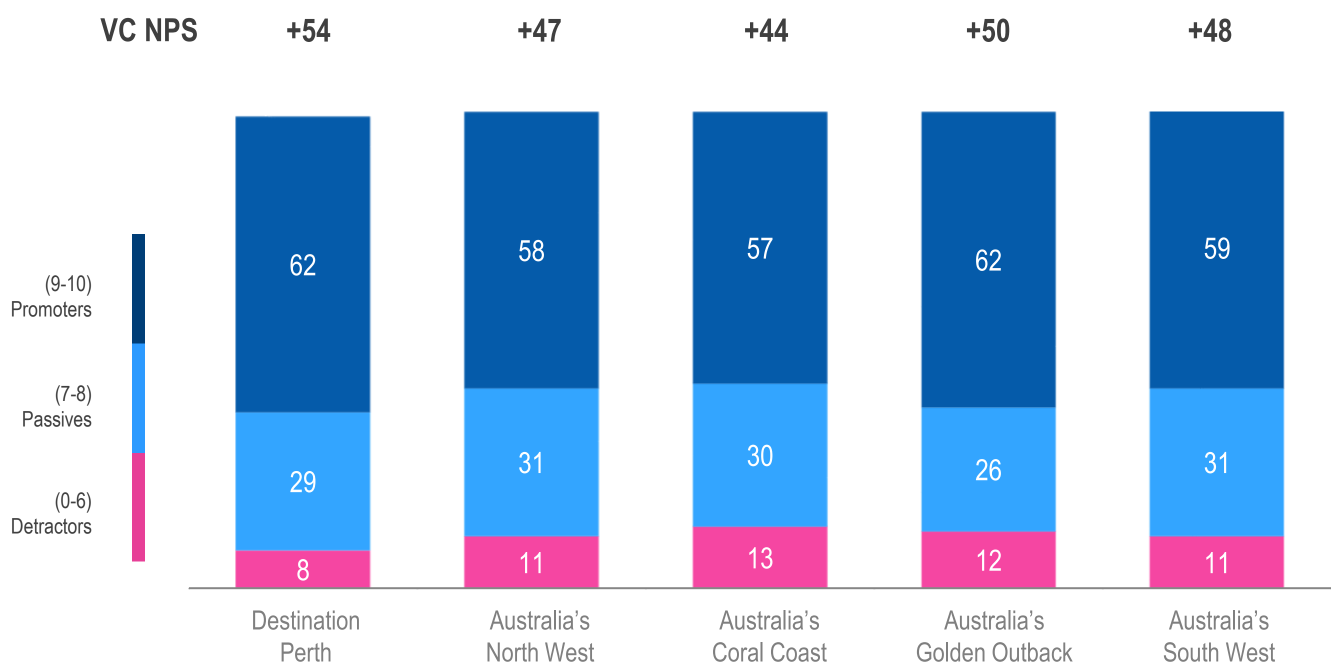
VC users across the state are all extremely satisfied with their experiences at the centres.

While users in all regions are equally satisfied with their VC experiences overall, users in the Golden Outback stand-out, as over 2 in 3 (69%) are *very* satisfied. Conversely, while still a strong score, users of VCs in the North West are the least satisfied, with just over 1 in 2 (54%) feeling *very* satisfied.



Q18. Overall, how satisfied or dissatisfied were you with your experience at the [LOCATION] Visitor Centre? Base: Those who visited the VC Perth (n=386), North West (n=231), Coral Coast (n=147), Golden Outback (n=297), South West (n=411).

And as a result, they are all highly likely to recommend the VC to other travellers in town.

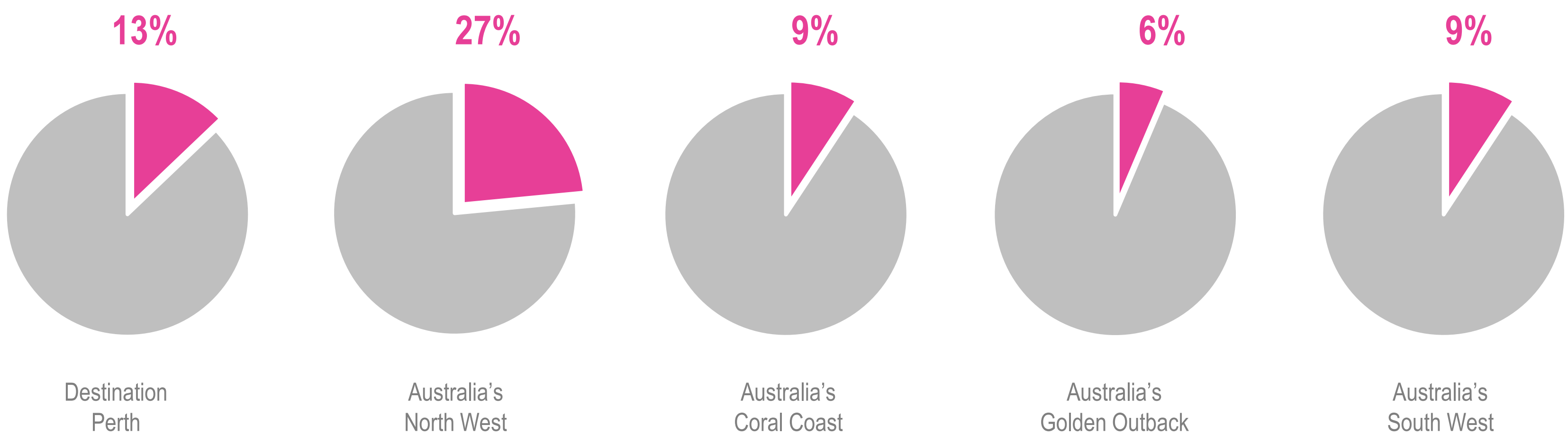


Q22. Thinking about your experience, how likely are you to recommend this Visitor Centre to other people visiting [LOCATION]? Base: Those who visited the VC Perth (n=386), North West (n=231), Coral Coast (n=147), Golden Outback (n=297), South West (n=411).

A proportion of VC users in all regions are likely to extend their stay in town – though this is highest in ANW.

While the ability of travellers to extend their stay in town may be limited by the nature of their trips and plans, understanding how VCs can position information for different traveller types could help drive more people choosing to extend their stay in town – i.e., opportunities for accommodation, 'bucket list' experiences that people cannot miss, 'off the beaten track' opportunities unique to the region, low-cost ways to entertain the family for longer etc..

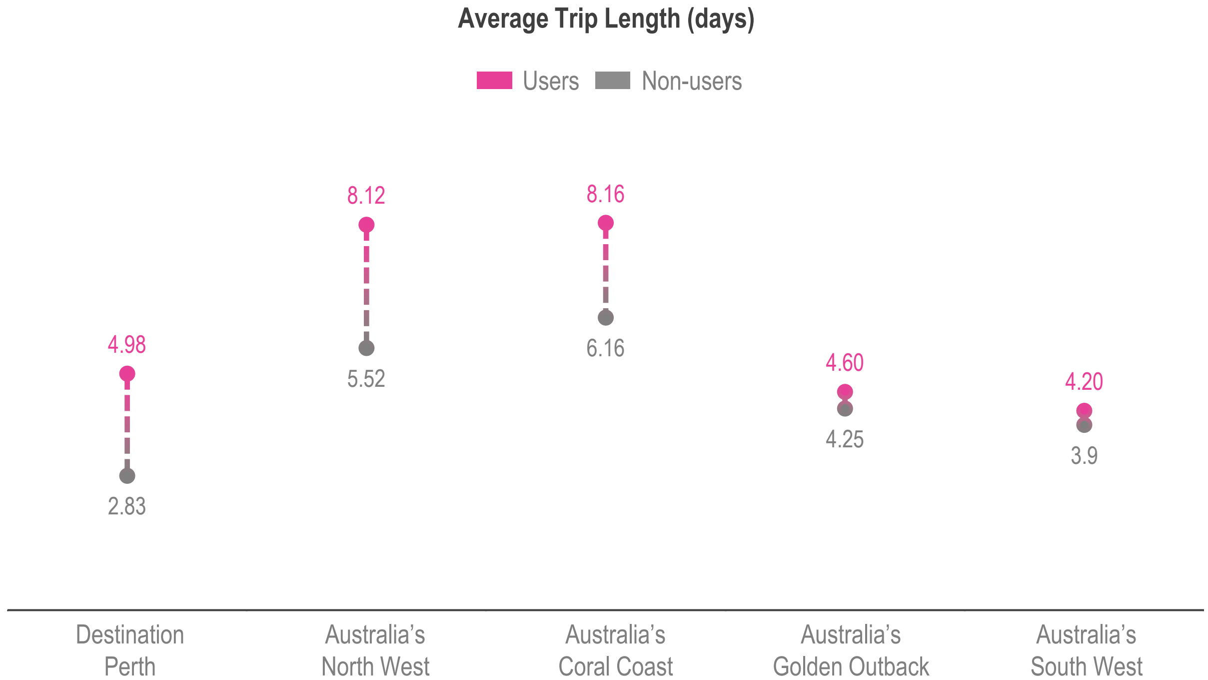
% Overnight users who extended their stay in town as a result of their visit



Q20. As a result of visiting the [LOCATION] Visitor Centre, [are you going to (or did you)/did you] extend your stay in [LOCATION]? Base: Overnight VC users (n=1188); Perth (n=220), North West (n=221), Coral Coast (n=140), Golden Outback (n=279), South West (n=328).

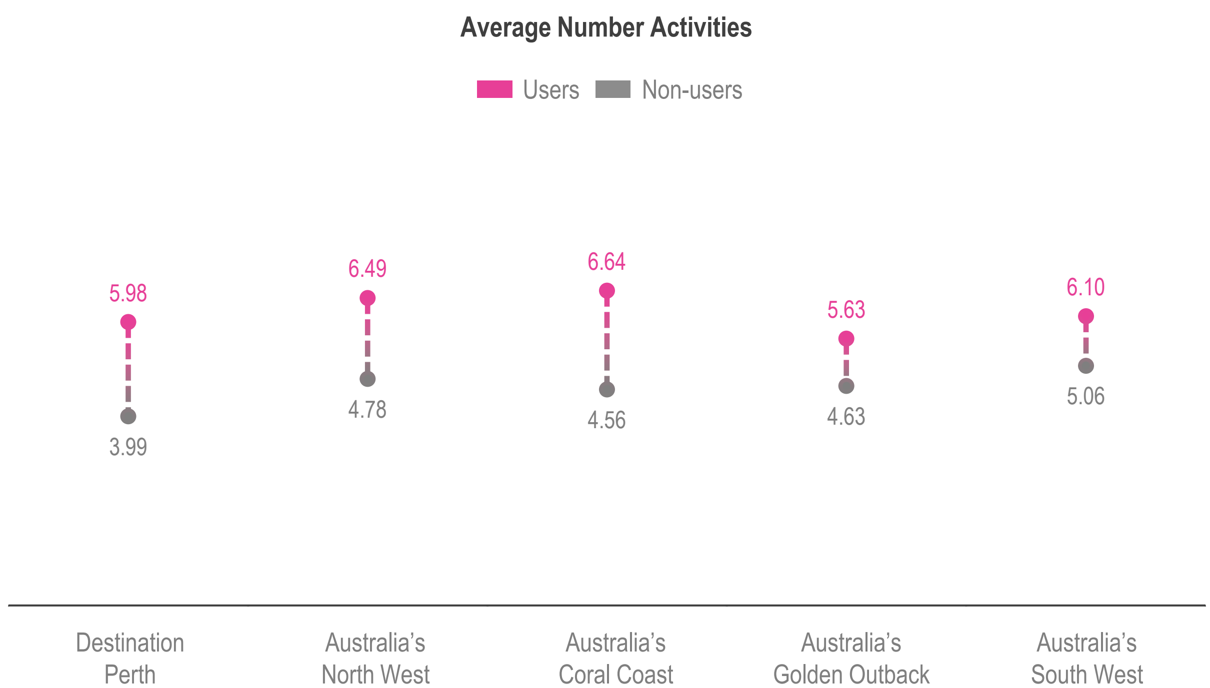
Comparing users and non-users in each region, users take longer trips across the state…

…however, it is greatest between VC users and non-users who visit DP, ANW and ACC. This gap being driven in part by the higher proportion of users in these regions who extend their stay.



Q5. What [is/was] the total length of your stay in [LOCATION Q32. How much do you estimate that you [have] spent on an average day during your time in [LOCATION], on each of the following? Base: Overnight post-trip Destination Perth users (n=117), non-users (n=178), North West users (n=152) and non users (n=162), Coral Coast users (n=65) and non users (n=53), Golden Outback users (n=168) and non users (n=89), and South West users (n=98) and non users (n=115).

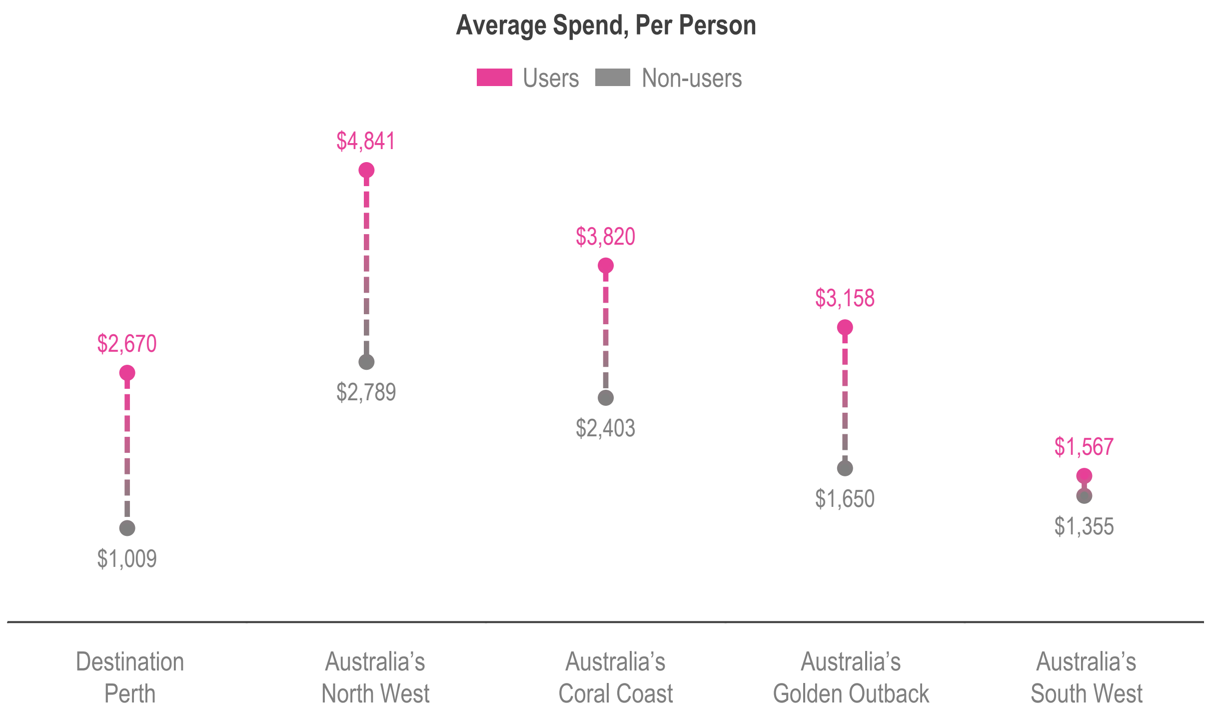
Across the state, VC users are also doing more on their trips, compared to non-users.



Q29. On this visit to [LOCATION], which of the following activities [have you already undertaken, or intend to/did you undertake] while you [are here/were there]? Base: Overnight post-trip Destination Perth users (n=117), non-users (n=178), North West users (n=152) and non users (n=162), Coral Coast users (n=65) and non users (n=53), Golden Outback users (n=168) and non users (n=89), and South West users (n=98) and non users (n=115).

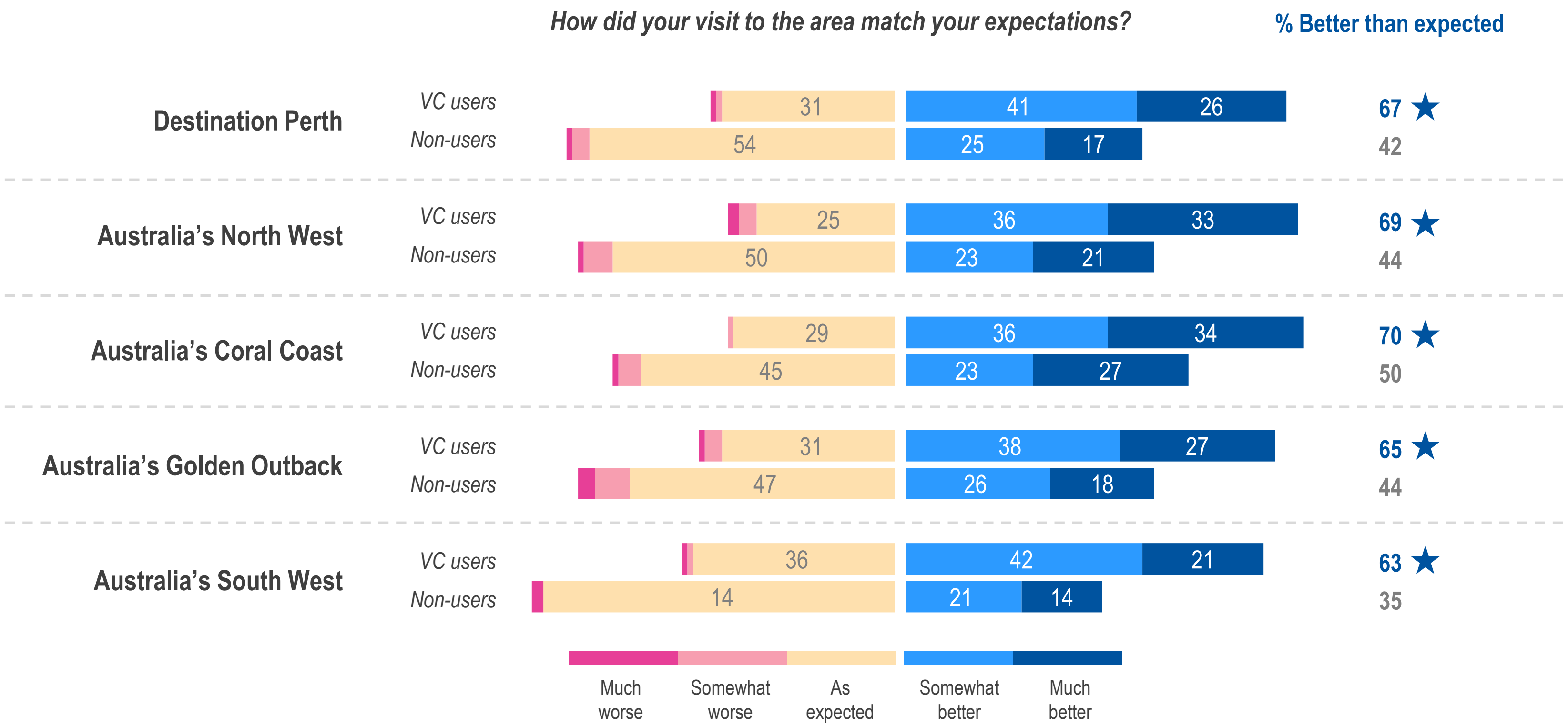
And VC users are spending more than non-users in all regions.

Although, it's apparent that South West VC usage is not associated with the same degree of increased spend comparatively. This is something which may be influenced by more closely aligning VC service and information delivery with traveller expectations and needs.



Q3. Q5. Q32. Q33. Base: Overnight post-trip Destination Perth users (n=117), non-users (n=178), North West users (n=152) and non users (n=162), Coral Coast users (n=65) and non users (n=53), Golden Outback users (n=168) and non users (n=89), and South West users (n=98) and non users (n=115).

Finally, those who use a VC anywhere across WA are significantly more likely to have their trip expectations **exceeded**!



Q36. How [has/did] your visit to [LOCATION] [matched/match] your expectations? Base: Overnight post-trip Destination Perth users (n=386), non-users (n=637), North West users (n=231) and non users (n=201), Coral Coast users (n=147) and non users (n=77), Golden Outback users (n=297) and non users (n=143), and South West users (n=411) and non users (n=224).

The Economic Impact of WA Visitor Centres

The economic impact formula used in 2015…

The below formula is based on the following assumptions:

- The impact of a VC can be measured by looking at the spend of *only* overnight visitors
- Visitors can reliably state the additional expenditure they incurred as a direct result of their visit to a VC

Average spend per night, as stated that was attributable to a VC *(overnight visitors only)*

×

Average length of stay *(overnight visitors only)*

=

Average total spend among VC users, as stated that was attributable to a VC

×

Total VC users in WA in 2014 *(overnight visitors only)*

=

Total spend in WA attributable to a VC *(overnight visitors only)*

Using the exact same method of calculating economic value as was used in 2015, we see that VCs generated over **$226 million in 2023**.

	2015 *overnight only*	**2023** *overnight only*
Number of VC users in WA per annum [IVS / NVS]	1,117,743	1,277,000
Average Spend Per Person, Per Day	$139.89	$449.27
Proportion of User Spend Attributable to VC	11.2%	5.1%
User Spend Per Day Attributable to VC in Dollars	$15.67	$22.85
Average Length of Stay in Destination	6.66 days	7.77 days
User Spend Per Trip Attributable to VC	$104.36	$177.49
Total Overnight Visitor Spend in WA Attributable to VCs	**$116,650,119**	**$226,660,201**

Why has this increased?

- ↑ cost of living
- ↑ accomm. costs
- ↑ demand for travel

Closest replication of 2015 process achievable, including weighting to 2015 proportions of travellers.

But, there are a number of ways we suggest to evolve the VC impact calculation this year...

- Speaking to only to people who have finished their trip (not mid-trip) and have a complete and accurate picture of their total trip spend
- Including not just VC users who are overnight travellers, but also include day-trippers
- Weighting the data to be representative of WA traveller profile as per NVS (by the % of intrastate, interstate and international visitors)

By including the spend of day trippers attributable to a VC, an additional $34 million is added to this impact.

	2015 *overnight only*	**2023** *overnight only*	**2023** *day-trippers only*
Number of VC users in WA per annum [IVS / NVS]	1,117,743	1,277,000	698996
Average Spend Per Person, Per Day	$139.89	$449.27	$182.93
Proportion of User Spend Attributable to VC	11.2%	5.1%	27.2%
User Spend Per Day Attributable to VC in Dollars	$15.67	$22.85	$49.66
Average Length of Stay in Destination	6.66 days	7.77 days	1 day
User Spend Per Trip Attributable to VC	$104.36	$177.49	$49.66
Total Visitor Spend in WA Attributable to VCs	**$116,650,119**	**$226,660,201**	**$34,712,455**

Closest replication of 2015 process achievable, including weighting to 2015 proportions of travellers.

The combined impact of overnight and day trip VC users was more than $261 million in 2023.

However this value is still weighted to 2015 visitor proportions (by market), and is not truly representative of WA travellers in 2023.

	2015 *overnight only*	**2023** *overnight only*	**2023** *day-trippers only*
Number of VC users in WA per annum [IVS / NVS]	1,117,743	1,277,000	698996
Average Spend Per Person, Per Day	$139.89	$449.27	$182.93
Proportion of User Spend Attributable to VC	11.2%	5.1%	27.2%
User Spend Per Day Attributable to VC in Dollars	$15.67	$22.85	$49.66
Average Length of Stay in Destination	6.66 days	7.77 days	1 day
User Spend Per Trip Attributable to VC	$104.36	$177.49	$49.66
Total Visitor Spend in WA Attributable to VCs	**$116,650,119**	**$226,660,201**	**$34,712,455**
		$261,372,656	

Closest replication of 2015 process achievable, including weighting to 2015 proportions of travellers.

When weighted, this more accurate figure still demonstrates that WA VCs created over **$201 million** in direct economic impact in 2023.

	2015 *overnight only*	2023 *overnight only*	2023 *day-trippers only*
Number of VC users in WA per annum [IVS / NVS]	1,117,743	1,277,000	698996
Average Spend Per Person, Per Day	$139.89	$449.27	$182.93
Proportion of User Spend Attributable to VC	11.2%	5.1%	27.2%
User Spend Per Day Attributable to VC in Dollars	$15.67	$22.85	$49.66
Average Length of Stay in Destination	6.66 days	7.77 days	1 day
User Spend Per Trip Attributable to VC	$104.36	$177.49	$49.66
Total Visitor Spend in WA Attributable to VCs	**$116,650,119**	**$226,660,201**	**$34,712,455**
		$261,372,656	
		$201,328,972 *when weighted to NVS data*	

Closest replication of 2015 process achievable, including weighting to 2015 proportions of travellers.

Impact of representative weighting to International and National Visitor Survey.

	DIRECTLY ATTIRUBTABLE *Weighted to 2015 sample proportions*		**DIRECTLY ATTIRUBTABLE** *Weighted to IVS and NVS market proportions*	
	2023 *overnight only*	**2023** *day-trippers only*	**2023** *overnight only*	**2023** *day-trippers only*
Number of VC users in WA per annum [IVS / NVS]	1,277,000	698996	1,277,000	698,996
Average Spend Per Person, Per Day	$449.27	$182.93	$450.47	$177.26
Proportion of User Spend Attributable to VC	5.1%	27.2%	4.3%	27.6%
User Spend Per Day Attributable to VC in Dollars	$22.85	$49.66	$19.39	$48.90
Average Length of Stay in Destination	7.77 days	1 day	6.75 days	1 day
User Spend Per Trip Attributable to VC	$177.49	$49.66	$130.89	$48.90
Total Visitor Spend in WA Attributable to VCs	**$226,660,201**	**$34,712,455**	**$167,146,073**	**$34,182,899**
	$261,372,656		**$201,328,972**	

Closest replication of 2015 process achievable, including weighting to 2015 proportions of travellers.

There's also another way of looking at a more holistic value of what VCs both generate *and* support in WA

- Rather than relying on the stated spend that users believe they spent as a direct result of visiting the VC, we can instead look at the overall difference in total trip spend between users and non-users.
- While not every additional dollar spent by those that use a VC may directly attributable to their VC visit, it does in more holistic way reflect the higher value of VC users.
- This evolved version of the impact calculation considers both the direct value that VCs generate, but ALSO the indirect value that they support.

Travellers who used a VC spent $740 million more than other travellers.

We know that VC users are more likely to be on a leisure trip and take longer trips on average, so this isn't to say that VCs generated *all* of this value directly. Rather, it demonstrates the high value of the travellers they support.

	Indirect Value Supported *Weighted to IVS and NVS market proportions*	
	2023 *overnight only*	**2023** *day-trippers only*
Number of VC Users in WA per annum [IVS / NVS]	1,277,000	698,996
Average VC User Spend Per Person, Per Day	$485.03	$117.64
Average Non VC User Spend Per Person, Per Day	$386.24	$98.24
Average Difference in User / Non-User Spend, Per Day	$98.79	$19.40
Average VC User Length of Stay in Destination	5.76 days	1 days
Average Difference in User / Non-User Spend Total Trip	$569.14	$19.40
Total Value Supported by VCs	**726,786,657**	**13,558,296**
	$740,344,953	

Over $200 million can be directly attributed to VCs, and they indirectly support users spending 3-4x more.

	Directly Attributable *Weighted to IVS and NVS*	
	Overnight	*Day Trips*
Number of VC users in WA per annum	1,277,000	698,996
Avg. Spend Per Person, Per Day	$450.47	$177.26
Proportion of User Spend Attributable to VC	4.3%	27.6%
User Spend Per Day Attributable to VC	$19.39	$48.90
Avg. Length of Stay in Destination	6.75 days	1 day
User Spend Per Trip Attributable to VC	$130.89	$48.90
Total Spend Directly Attributable to VCs	**$167,146,073**	**$34,182,899**
	$201,328,972	

	Indirect Value *Weighted to IVS and NVS*	
	Overnight	*Day Trips*
Number of VC Users in WA per annum	1,277,000	698,996
Avg. VC User Spend Per Person, Per Day	$485.03	$117.64
Avg. Non VC User Spend Per Person, Per Day	$386.24	$98.24
Avg. Difference in Spend, Per Day	$98.79	$19.40
Avg. VC User Length of Stay in Destination	5.76 days	1 days
Avg. Difference Spend Total Trip	$569.14	$19.40
Total Value Supported by VCs	**726,786,657**	**13,558,296**
	$740,344,953	

Note calculation steps and processes differ. Directly attributable spend formula uses closet replication of steps taken in 2015, including filtering of data at separate steps of the calculation process (used in 2015 due small samples restricting exclusive use of post-trip respondents). Treatment of outlier values also differs, with the directly attributable formula replacing trip lengths >90 days with 3.66. Indirect value formula removed cases with values > 3 sigma above means for trip length, party size and spend categories. As a result of these differences avg. spend per VC user per day and average length of stay in destination differs.

The insights...

Overall, it's clear that Visitor Centres help to generate a lot of value and have a significant, positive impact on the WA tourism economy.

This research has evidenced this by demonstrating:

- $201 million of visitor spend can be directly attributed to WA VCs in 2023.
- VCs indirectly support users spending 3-4x more than this, reinforcing the broader impact of centres on the traveller economy.
- 96% of all VC users are satisfied with their experiences, and 60% are highly likely to recommend the services to others. This satisfaction with VCs is seen consistently across WA's tourism regions.
- With 12% of VC users extending their stays in town, this suggests that VCs played a role in extending stays in WA towns by 394,560 days!
- VC users tend to have longer trips, spend more, and engage in more activities compared to non-users. Their visits to VCs influence them to spend more on their trips and often lead to their trips exceeding expectations.
- 88% of VC users agree that visiting a VC is an important part of their destination experience and perceptions.

These insights demonstrate the significant role VCs play in shaping travel behavior, enhancing visitor experiences, and contributing to the value of Western Australia's tourism industry. As such, there is ample evidence to support the continued effort and investment into Visitor Centres across WA.

There are a number of important strategic implications that could help drive further VC usage in WA:

1. Consider enhancing the VC's online presence and services available digitally. We know that a significant proportion of the general population prefer accessing information digitally – and this could be a trigger for them to also want to visit the centre in person.

2. Continue to find ways to further personalise visitor services, which becomes a point of difference from information sourced online and extra value that centres can offer.

3. Expanding the awareness and usage of VCs via promotion of their services – to reduce the barrier of awareness among non-users.

4. Further strengthen partnerships with local tourism stakeholders, including accommodation providers, tour operators and attractions, to enhance the overall visitor experience (and increase their spend!).

5. Explore ways to continuously collect feedback on visitor experiences. This could help inform a system for continuous improvement and evaluation to monitor the effectiveness of VC operations and services.

Optimisation opportunities:
by region

Destination Perth

Satisfaction and likelihood to recommend the DP VCs were among the strongest results across WA. This is likely driven by the fact that there are no significant gaps between the information sought and the information users received from the VC they visited, suggesting that users largely getting what they come in for.

However, slightly fewer users indicated that they received information about activities, relative to the proportion who were seeking this information. This aligns with fewer travellers in this region being likely to mention the centre as having lots of information as a driver of their satisfaction. This may highlight an opportunity to deliver more activity-based recommendations and resources in DP VCs.

Among travellers who didn't go into the DP VCs, awareness that the VCs exist is lowest relative to other regions. Those who could be encouraged to visit the VC next time mentioned deals, information about what 'not to miss', and unique recommendations not available elsewhere as key drawcards – again highlighting the importance of local knowledge and service.

North West

While still very strong, users of VCs in ANW have the lowest satisfaction. However, they praise staff helpfulness and recommendations, with the presentation of information also mentioned as a key driver of overall satisfaction (more so than it was in other regions)

VC users in the North West are the most likely to have made a booking while in the centre, suggesting that the quality service and recommendations do largely convert through to bookings – and that this should continue to remain a priority in ANW VCs. A majority of VC users also indicate that they had pre-planned to come in centre, reinforcing the degree to which the centres are an important part of the traveller experience, particularly in more remote regions. The high degree of pre-planned visits and bookings highlight the economic impact of VCs in this region and the opportunity value of drawing more visitors into VCs.

Of those travellers who didn't visit a VC in ANW, deals, advertising and greater visibility of the VC were listed as top reasons that could drive visitation in the future.

Coral Coast

While satisfaction is strong, likelihood to recommend the ACC VCs is lower than in all other regions – which may be a reflection of the fact that they are the least likely VC users to mention staff friendliness, helpfulness and recommendations as a reason for their satisfaction. However, ACC VC users are complimentary of the centre design and high-quality displays on offer.

When it comes to the information / services visitors sought from the ACC VCs compared what they received, there is a gap in information and bookings of guided tours, and information on local services (such as hairdressers / mechanics etc.). Improving delivery of this information and services could be an opportunity to future satisfaction (and bookings).

ACC VC users are more likely to be young families and less likely to be empty nesters compared to other regions, so tailoring recommendations for these audiences is an important consideration.

Non-users mention deals, unique local recommendations not available elsewhere, and an update on 'what's new' since the last time they visited as ideas for driving future VIC usage.

Golden Outback

AGO VC users are the most satisfied across WA! Satisfied users are highly likely to mention friendly and helpful staff who provide quality recommendations, as well as the maps and brochures available, as the key drivers of their satisfaction.

However, there is a gap between the proportion of VC users who go into centres looking for information on location attractions and public transport, and those who receive this information. Instead, AGO VC users tend to end up receiving more information on local events, facilities and directions.

Travellers in this region are more likely to have pre-planned their VIC visit relative to most other regions, reinforcing that AGO VCs are an established part of the local traveller experience and deliver on needs.

Non-users feel that next time they're in town, unique local recommendations and deals would make them more likely to visit an AGO VC in the future, although a group of these travellers also mention wanting to know more about what services that VCs could offer them that would be personally appealing / relevant.

South West

Satisfaction and likelihood to recommend the ASW VCs were also among the strongest results across WA. The souvenirs and gifts available stand out as a driver of satisfaction compared to other regions, with general information available also emerging as a highlight. Although, compared to other regions, personalised recommendations are a less significant driver of satisfaction.

In terms of delivering on expectations, significantly fewer users of ASW VCs received information on local attractions and activities, relative to the proportion who went into the VC for this purpose – presenting an opportunity to improve the experience.

Awareness of VCs among non-users is highest relative to elsewhere in WA, with a high degree of familiarity with the area being the top reason for not going in among non-users – suggesting those who are repeat visitors to the region could be the biggest opportunity for user growth.

Deals, local recommendations and 'don't miss' attractions and experiences were mentioned as the types of offerings that would encourage future VC usage.

Hunt Smarter.

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