

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 visitor economy. As such, there is ample evidence to support the continued effort and investment into Visitor Centres across Western Australia¹. This information is particularly relevant for Local Governments, who currently provide an estimated 68% of the operational funding of accredited Visitor Centres in Western Australia⁵.

\$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.²

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)¹

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.¹

Analysis of online reviews of WA Visitor Centres supports this, showing that 91% of reviews in 2022-23 had a positive sentiment.³

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).⁴

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!**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 jobs⁶.

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.¹ "

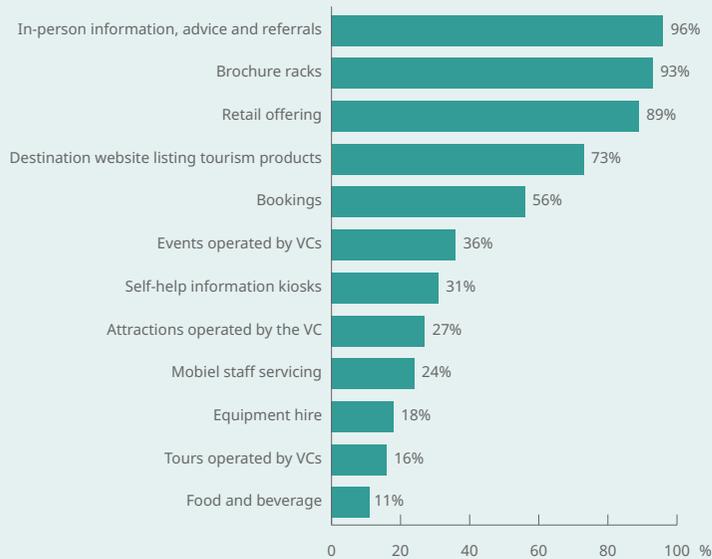


Image Credit: Visit Mandurah

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 I 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.

SERVICES OFFERED BY VISITOR CENTRES⁷

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

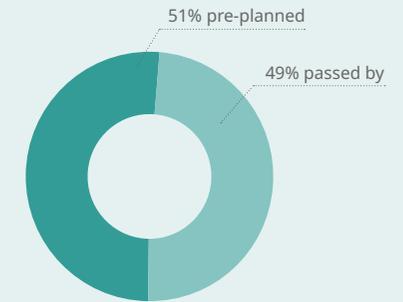


PRE-PLANNED VS. SPONTANEOUS

There is an even split between those who pre-plan to visit a Visitor Centre, and those who spontaneously choose to enter as they pass by.

Almost half (44%) of visitors who don't use a Visitor Centre say they would do so if they happened to go past it.¹

This demonstrates the importance of the location and visibility of Visitor Centres. This demonstrates the importance of the location and visibility of Visitor Centres.



TOP INFO / SERVICES RECEIVED AT VISITOR CENTRES

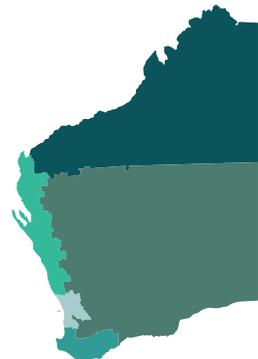
(% of users)¹



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

1. **Enhance online presence:** Travellers who are unlikely to use a Visitor Centre cite a preference for online sources as the main reason. Increasing exposure to and awareness of Visitor Centres through online channels could be a trigger to visit in-person.
2. **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).
3. **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 I 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.