Legatus Group

Tourism Visitor Information Services project

Report delivered by Leonie Boothby & Associates Pty Ltd

July 2019

NOTE: An associated report - the **Legatus Group Tourism Visitor Information Services Situational Analysis** – has been delivered separately. It contains additional detail including audit information and a gap analysis for Visitor Information Services in each of the four tourism regions located within the Legatus Central Local Government Region.

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A **list of tourism abbreviations** is included at the start of this report, and a **bibliography** is included at the end of the document.

Tourism abbreviations

ARTN	Australian Regional Tourism Network
LGA	Local Government Association
National VICN	National Visitor Information Centre Network
RDA	Regional Development Australia
RTO	Regional Tourism Organisation
SA AVICN	South Australian Accredited Visitor Information Centre Network
SATC	South Australian Tourism Commission
SATIC	South Australian Tourism Industry Council (now TiCSA)
TiCSA	Tourism Industry Council of South Australia (formerly SATIC)
TRA	Tourism Research Australia
VIC	Visitor Information Centre
VIO	Visitor Information Outlet
VIS	Visitor Information Services

Legatus Group: Tourism Visitor Information Services project

Executive report

Section 1: About the Legatus Group and regional tourism

The Legatus Group (Legatus) is a peak Local Government organisation comprising 15 member Councils. The Legatus Central Local Government Region sits across four South Australian tourism regions: Yorke Peninsula, Flinders Ranges and Outback, Barossa, and Clare Valley. A complicating factor (in a planning and operational sense) is that the geographical boundaries for Local Government regions and tourism regions do not match.

Local Government plays an integral enabling role in the achievement of regional tourism outcomes, including:

- providing funding to Regional Tourism Organisations (RTOs) – Barossa and Yorke Peninsula

- providing funding to Regional Development Australia (RDA) organisations

- providing key tourism infrastructure and signage

- development and planning advice and approval of tourism development applications

- township placemaking and beautification

- employment of tourism, events and economic development officers and development of strategies and plans

- funding and delivery of Visitor Information Services (VIS).

Most Legatus member Councils make a significant contribution to the management and delivery of VIS in their tourism regions (estimated at $2.5m p.a.), working alongside a range of partners, including individual tourism operators, RTOs, RDAs, tourism industry organisations and government departments.

RDAs across the Legatus region (RDA Yorke & Mid North, RDA Barossa Gawler Light Adelaide Plains and RDA Far North) play a pivotal role in tourism sector support by part-funding and auspicing RTO service delivery.

For more information, see **Appendix 2: Regions and stakeholders**.

Section 2: Project aim and objectives

The aim of this project was to provide member Councils of Legatus with recommendations – based on solid evidence and meaningful consultation – to inform them in considering ways that Local Government can support VIS now and into the future.

To that end, Legatus appointed Leonie Boothby & Associates to look at the way VIS are managed and delivered across the region; in particular to:

- gather and consolidate data and information to support current and future VIS initiatives

- identify gaps in current VIS delivery

- identify opportunities to improve and add value to VIS delivery

- identify areas of focus for future regional projects and funding.

Section 3: Project foundation and methodology

This project is based on an understanding of the general objectives of VIS being to:

- deliver up-to-date, accurate information in line with changing consumer wants and needs

- align with relevant destination marketing and strategic plans

- make the best use of Local Government funding and resources

- increase collaboration and partnerships in information delivery

- increase visitor numbers, length of stay and spend.

With those objectives in mind, Leonie Boothby & Associates has:

1. undertaken an audit of resources currently available to VIS delivery in the Legatus region (see **Appendix 3: Audit of current service delivery**)

2. conducted research to identify trends and best practice relating to VIS delivery and considered the role of Local Government in VIS (see **Appendix 4: Information review**)

3. consulted with local, regional and state tourism representatives, including at a workshop with key stakeholders to discuss early findings and implications for future VIS delivery (see **Appendix 5: Stakeholder consultation**)

4. **analysed data and research findings to develop a situation and gap analysis as well as some localised suggested considerations for each of the four tourism regions included in the project (this material has been presented in a separate Situation Analysis document)**

5. recommended a new model of VIS that is in line with the aim and objectives of the project and aligned to local, state and national tourism plans and strategies (**see next sections and Appendix 1: Best-practice Visitor Information Services**).

Section 4: Project recommendation - a new model

The project recommendation is that Legatus member councils and regional tourism partners consider adopting a new VIS delivery model that is regional, visitor-centric and blended. Within the model are clearly defined advocacy and facilitation roles for Legatus that are responsive to the VIS needs of the region as communicated by local and regional tourism industry practitioners and partners.

The new VIS model will focus on tourism regions rather than Local Government boundaries and will support VIS providers to provide visitor-centric and blended information services. Developing the new model will involve a shift in approach by Legatus member Councils in terms of the way their contributions to VIS are used in the region. However, whilst regional in resource-sharing and general focus, these services will be tailored to reflect the unique tourism opportunities and target markets of different localities and tourism experiences within each tourism region.

Development of the Tourism Region VIS model will be an explicit acknowledgement of:

- the importance of VIS to the visitor economy, as well as the importance of the visitor economy to the regional and state economies

- the social benefits of VIS as part of the wider visitor economy, including increased prosperity, opportunities for volunteers, the creation of connected and vibrant communities, and population retention and growth

- the need to create opportunities for continuous improvement in the delivery of VIS, making the most of Local Government investment in the tourism sector, as well as maximising the benefits of existing and new partnerships and collaborations.

Section 5: The Tourism Region VIS model - key elements

The key elements of the Tourism Region VIS model – regional, visitor-centric and blended – are based on evidence from research and practice in Australia and internationally regarding what contributes to successful VIS delivery. To varying degrees, VIS in SA's tourism regions already demonstrate these elements of best practice, with managers, staff and volunteers working hard to meet the information needs of visitors. The new Tourism Region VIS model builds on this strong foundation, providing frameworks for governance and practice that enable VIS providers to be well supported to deliver effective, efficient and contemporary VIS.

What these key elements would look like if applied to the Legatus region is described below.

Element: Regional

What it looks like:

Legatus member Councils in each tourism region work with each other and with their tourism partners in a strategic way, sharing costs, sharing resources and providing leadership opportunities for individuals and VIS with strengths in particular areas. A framework is in place to ensure effective communication between Legatus, VIS providers and regional tourism partners regarding VIS delivery improvements and opportunities for collaborative projects and programs across the four tourism regions. The model ensures that there is balanced consideration of the bigger regional picture and the unique situation, markets and priorities in different localities within each region.

The role of Legatus as a peak body in this element of the new model is primarily one of advocacy, arising from its regional and cross-regional reach and its existing strong relationships with the tourism industry and all levels of government. Initially, Legatus works with member Councils to develop consensus regarding a shift to a tourism-regional perspective in terms of contributions – financial and otherwise – to tourism in general and VIS delivery in particular. With a framework for its wider advocacy in place, Legatus advocates to all levels of government for increased recognition and support for regional tourism – again, financial and otherwise – from its strengthened position as a representative and consistent 'voice' of the four tourism regions.

Element: Visitor-centric and blended

What it looks like:

Visitor information services in each region are responsive to visitor needs, providing the information people want, when and how they want it. Optimally located and accredited Visitor Information Centres (VICs) are the 'hub' of VIS in each region, with the 'spokes' being accredited VICs or unaccredited Visitor Information Outlets (VIOs), as well as roving ambassadors, pop-ups and mobile delivery. These face-to-face services operate alongside digital delivery of up-to-date, accurate and user-friendly tourism information that is available to people before their visit, while they are visiting, and following their visit.

On an ongoing basis, face-to-face VIS delivery integrates technological advances to maximise the overall visitor experience, for example, through the use of virtual reality and other interactive experiences in VICs. Also, on an ongoing basis, digital VIS delivery is considered from a regional perspective, with collaboration and agreement on regional branding and the role of sub-brands, as well as on the use, management and maintenance of digital resources within and across tourism regions.

The role of Legatus as a peak body in this element of the new model is primarily one of facilitation – in two main areas. Firstly, arising from its function as a platform for member Councils to work together on issues of mutual interest, Legatus facilitates opportunities for the development of regionally consistent VIS and other tourism-related plans and strategies. Secondly, arising from its ability to act as an auspicing body, Legatus facilitates the identification of, funding for, and governance of, VIS projects and programs, working with VIS providers and tourism partners to ensure that such projects and programs are needed, complementary, and, when appropriate, regional in perspective and focus.

Section 6: Actions to support the development of the Tourism Region VIS model

Developing and implementing the Tourism Region VIS model requires a shift in approach to VIS delivery in the Legatus region and will take time and resources. The actions described below will support the development of the model and can also be implemented in a staged process that aligns with resource capacity and funding opportunities.

6.1 Developing the Tourism Region VIS model: working regionally

Actions: Legatus Group	Rationale	Details
6.1.1 Advocate to raise awareness and build consensus among member Councils to support a shift in approach to a tourism-regional rather than a council-specific perspective with regard to VIS delivery.	Visitors do not see council boundaries and are looking for seamless, consistent VIS when they travel.	Develop key messaging that communicates: • the importance of the visitor economy to regional communities • the importance of VIS to the visitor economy and regional communities • the importance of the ongoing investment by Local Government in VIS. Conduct workshops with member Councils, including CEOs, elected members and staff, to: • raise awareness of the value of VIS to the economy of whole regions, not just locations with significant tourism activity • explain and seek input regarding a shift to a regional approach to support of VIS by member Councils • emphasise that a tourism-region approach is not about increasing the contributions made by individual member Councils but about making the best use of resources.

6.1.2	VIS providers and tourism partners in each of the regions have limited (or no) capacity to add to their workload. Given its ability to act as an auspicing body and its placement as a cross-regional group, Legatus is the logical home for this short-term resource. In the longer term, a better-resourced Regional Tourism Organisation (RTO) in each region would ideally take over this coordination-of-collaboration role.	Seek funding for the appointment of a Project Officer:
Facilitate and auspice the appointment of a Project Officer to develop the Tourism Region VIS model for the Legatus region.		• Pull together a working party, including tourism region representatives, to oversee the appointment process. • Develop a project scope setting out requirements for the role, i.e. the scope of work and key skills and experience. • Develop a high-level business case to support the funding application that provides a cost-benefit analysis / return on investment (forecast resultant economic impact – increase in visitation and spend).
6.1.3 Work with member Councils and regional partners to maximise synergies with related, complementary project delivery.	Legatus undertakes projects on behalf of its member Councils that address common challenges and opportunities. The opportunity exists to identify complementary actions and initiatives amongst these projects.	Legatus to assess opportunities to support implementation of the Tourism Region VIS model via delivery of the following complementary projects / initiatives: • Business Support – Creative Industries / Events and Small Business Friendly Program (including recommended formation of a Legatus Economic Development Advisory Committee) • Youth in Volunteering project (including links with the Volunteering Strategy for South Australia) • Digital Growth • Regional Transport Plan (particularly around identified key 'regional tourism roads')

6.1.4 Advocate to relevant governments for urgent and ongoing funding for identified VIS priorities.	State and Commonwealth government tourism plans and strategies consistently acknowledge the importance of regional tourism to the visitor economy, and also acknowledge the substantial contribution made by Local Government to tourism. As a Local Government peak body, Legatus is well placed to initiate and lead discussions with other levels of government regarding gaps in funding and resourcing of VIS and related infrastructure.	In collaboration with the South Australian Region Organisation of Councils (SAROC), advocate for funding to: • increase capacity of RTOs to lead regional collaboration and regional VIS delivery • address key tourism infrastructure gaps that impact VIS delivery, e.g. digital connectivity (mobile black spots and internet speeds).
6.1.5 Facilitate the development of a sustainable regional tourism resourcing model.	A resourcing model that will ensure that best use is made of existing and future Local Government investment in VIS is likely to be supported by member Councils. There is potential for State Government facilitation of a regional or local levy to raise funds for regional tourism resources that support regional VIS delivery.	Work with member Councils, tourism partners and other levels of government to explore and consider funding, human resources and other support that will best serve improved regional VIS delivery, including potential new funding options, such as: • a visitor levy applied on arrival in SA and shared among all tourism regions • a business or community levy that could be applied and distributed at regional level • industry membership that could fund regional initiatives, e.g. RTO membership fees, VIC membership fees.

Actions: VIS providers and partners in individual tourism regions	Rationale	Details
6.1.6 Develop an individual tourism region VIS framework.	Individual member Councils invest significant funds that support regional visitor economy sustainability and growth (including ongoing investment in VIS). Implementation of a tourism region VIS framework will: • facilitate efficiencies that maximise the return on Local Government investment in VIS • support approaches to State Government for funds for regional tourism resources that support regional VIS delivery • capitalise on the existing strengths, skills, knowledge and experience of regional VIS teams • improve communication between VIS stakeholders and partners • improve the quality of visitor experience.	Engage all regional stakeholders (tourism operators and associations, RTOs, VICs, VIOs, RDA and member Councils) to develop a framework for VIS delivery that: • puts in place service agreements or memoranda of understanding, setting out how partners will work together in planning and delivering VIS for the tourism region • aligns with regional tourism plans and incorporates state tourism targets • sets regional VIS goals, performance targets, measures and a reporting framework, including an annual review of the framework • determines stakeholder roles and responsibilities in achieving regional VIS goals in line with their strengths, agreed level of engagement and existing resources, skills, knowledge and capability • creates opportunities for sharing of resources, aiming for best use of available funding and staff and volunteer resources • determines where and how VIS will be delivered, i.e. VICs, VIOs, temporary or mobile VIS (which may be shared across regions) • ensures that the local aspect of VIS delivery is not lost in the development of a regional approach

		• considers centralised oversight of face-to-face and digital VIS delivery
		• considers opportunities to share costs while improving quality and consistency of information material currently produced in the region
		• determines what revenue streams will be developed to offset the cost of face-to-face VIS delivery
		• identifies opportunities to improve marketing, networking and communication among stakeholders
		• sets in place mechanisms to enable regular advocacy to industry bodies, e.g. TiCSA, for increased higher-level branding awareness activities, e.g. promoting the VIC yellow 'i'.
6.1.7 Conduct awareness-raising campaigns regarding the economic and social importance of VIS to regional communities. These campaigns should complement and be run in conjunction with the similar awareness campaign being run by Legatus for its member Councils.	VIS (in particular, VICs) are heavily reliant on Local Government funding and therefore vulnerable to shifting priorities and support by councils-of-the-day. Increased awareness of the value of VIS to the community and encouragement of innovative engagement in VIS delivery is likely to result in increased support for continued Local Government VIS funding and support for other potential funding sources, e.g. business, visitor or community levies.	Utilising key messaging developed by Legatus for the similar awareness campaign being run for its member Councils, develop and deliver a community engagement plan that: • communicates key messaging • encourages local community engagement with and use of VIS including as volunteers and local ambassadors.

6.2 Developing the Tourism Region VIS model: delivering visitor-centric, blended services

Actions: Legatus	Rationale	Details
6.2.1 Facilitate the development of a framework for the sharing of resources across the tourism regions within the Legatus region.	Local Government already collaborates regionally in areas such as public health, community transport, procurement and waste management. Regional VIS delivery provides a further opportunity to create efficiencies in provision of services. Individual VIS providers across the tourism regions are (generally) operating independently of one another with resultant duplication of effort and potential inconsistency in delivery of VIS. Joining together to share resources, specialist skills and knowledge will improve VIS delivery and create economies of scale and financial and time efficiencies.	Subject to the successful auspice of a Legatus VIS Project Officer (refer above), develop a framework for VIS resource development and sharing across individual tourism regions and more broadly across the Legatus region. Key areas for consideration: 1. Consult with VIS providers to determine potential areas for resource sharing, including - • procurement • training and development (staff, volunteers) • sharing of staff and volunteers, development of mentoring programs • development of information and promotional materials 2. Determine a model for resource sharing: • identify relevant specialist skills and knowledge and areas of specific expertise amongst the VIS provider group • scope initiatives including costs and benefits and potential delivery mechanisms • negotiate outcomes with VIS providers.

6.2.2 Facilitate the development of a staff and volunteer VIS training and development program across the tourism regions within the Legatus region.	Delivery of contemporary face-to-face VIS that meets visitor needs requires a range of knowledge and skills amongst staff and volunteers. Shorter lead times for bookings, shorter holiday periods and higher expectations from visitors (authentic, unique, more personalised experiences) and the increased need for integration of technology with face-to-face VIS are just some of the changes impacting VIS delivery. Development of a Legatus region VIS training and development program should assist in reducing duplication of effort and efficiently address current and ongoing needs.	Subject to the successful auspice of a Legatus VIS Project Officer (refer above) or successful negotiation of tourism partner resources: • undertake a VIS training and development needs analysis that identifies and addresses current and emerging training and development needs for staff and volunteers, with areas already identified including sales (upselling, converting an enquiry into a sale), storytelling and information technology • consider opportunities to share training costs more broadly within tourism regions e.g. training applicable to other sectors / organisations such as galleries, museums • identify suitable providers and potential partners to address training and development needs • develop a program to deliver required training for staff and volunteers.

| 6.2.3

Develop a tourism region volunteer attraction and retention program. | VICs across the Legatus region engage significant volunteer effort in delivery of VIS whilst others either do not use or have very few volunteers.

Involving volunteers in face-to-face VIS delivery provides benefits including improving the financial sustainability of VIS delivery, increasing opportunities for volunteerism, increasing the number of local ambassadors and, importantly, increasing the opportunity for visitor interaction with local people. | Subject to the successful auspice of a Legatus VIS Project Officer (refer above) or successful negotiation of tourism partner resources:

Engage regional stakeholders (VICs, VIOs, RDA and member Councils) to develop a framework for volunteer involvement in VIS delivery that considers:

sharing of resources including volunteer management templates and systems initiatives for volunteer attraction and retention including mechanisms for engagement with youth, e.g. development of partnerships with educators and employment providers opportunities to work with RDA and local employment providers to create pathways to employment that utilise volunteering in VIS as a launching pad to future paid employment opportunities for volunteers to receive recognition for training and on-the-job learning engaging volunteer managers across the tourism region to develop a volunteer support framework that assists in increasing quality and consistency of VIS delivery, e.g. regular communication, a volunteer mentor program. |

6.2.4 Facilitate the development of a VIS data capture and sharing framework for use across the tourism regions within the Legatus region.	VIS delivery (face-to-face and digital) results in interactions with a significant number of people from whom valuable insights, information and data can be gained. Measurement of VIS performance is about more than just visitor numbers through VICs. With a transition to a Tourism Region VIS model, meaningful data capture, management and sharing is required on a regional basis and needs to reflect all aspects of VIS delivery. Meaningful data capture and use is pivotal in management of regional VIS performance and identification of opportunities for continuous improvement. Data and information gathered can also assist in providing solid evidence of the value of VIS to the visitor economy and regional communities.	Subject to Legatus obtaining and directing project funding and / or negotiating tourism partner resources, the project will: • engage key VIS stakeholders (SATC, TiCSA, RDA, RTOs, VICs, VIOs and member Councils) to establish an optimum dataset • explore potential partnerships with VIS stakeholders, SA universities, TAFE SA and Australian Bureau of Statistics to develop standardised data and information collection templates and potential resources to collect, manage and analyse data • develop a data capture and sharing framework • develop tools, templates and training for tourism region partners to utilise data and information gathered to communicate to stakeholders the value of VIS to the visitor economy and alignment of VIS to state and Local Government goals and targets.

Actions: VIS providers and partners in individual tourism regions	Rationale	Details
6.2.5 Review current individual VIC visitor experience delivery against best practice and implement changes that improve the visitor experience, increase visitor length of stay and spend, and increase return visitation.	VICs can play a pivotal role in maximising visitor length of stay, spend and likelihood to return to a tourism region. To be successful in that role, VICs need to ensure that the visitor experience provided is in line with contemporary visitor needs, high quality, authentic and engaging.	Engage VIC staff, volunteers and tourism partners in creating an improved VIC visitor experience that: - makes visitors feel welcome and entices them to engage in conversation and enquiry - provides visual promotion of key attractions, products and experiences across the region via digital and hard copy imagery - provides an inviting and easy to navigate space where visitors can freely interact with staff and volunteers - provides engaging interpretive and visitor information that entices visitors to explore and stay longer in the region - entices visitors to purchase a memento, gift, regional art, craft or produce item that reinforces the regional brand and promotes regional businesses - enables easy development of a tailored visitor itinerary provided digitally or in hard copy - increases the visitor's understanding of the region, its people, history, heritage and what makes it a special place to visit - is engaged with by locals when hosting visitors and to regularly find out what's on - facilitates interaction with well-informed, trained and resourced staff and volunteers that is informative, useful and inspires increased length of stay and spend - delivers on the regional brand 'promise'.

Legatus Group: Tourism Visitor Information Services project

Part 2: Supporting appendices

Appendix 1: Best-practice Visitor Information Services

The success of VIS depends on a range of factors, including those that are unique to the location and circumstances in which they are delivered. There are, however, some components of VIS delivery that can be considered 'best-practice' and which can be used as a measuring standard for the development and improvement of VIS in any location. These components have been identified through research and consultation undertaken as part of this project. Contextual and other detail can be found in discussion throughout this report and its appendices.

A key action recommended in **Section 6** of the report is for VIS providers and partners in individual tourism regions to develop an individual tourism region VIS framework. The information below is provided as additional detail to support implementation of that action and components of VIS delivery that may be considered best practice.

Developing the framework: who to involve

Engage all regional stakeholders (RTO, VICs, VIOs, industry, Local Government, RDA, industry (operators and local tourism associations) and member Councils to develop a streamlined tourism region VIS delivery strategy / framework.

Consider the most effective mechanisms for engagement with each stakeholder group, e.g. newsletters, workshops, networking events, collaborative regional reports to councils, social media and local media.

Local Government

Council areas within each tourism region will have a different level of economic dependence on the visitor economy and will be at varying levels of maturity and capacity in terms of engagement with the sector. Create opportunities to engage all councils within the tourism region, aligning the level of engagement with resource capacity and to stakeholder visitor economy goals, plans and strategies.

Industry

Different stakeholders in each tourism region will have different levels of relationships with industry including regular networking and information sharing. Consider the most effective mechanisms to engage with industry in development of the framework, including gaining feedback on support required, models for ongoing communication, and development of initiatives in line with VIS goals.

Community

Create engagement initiatives that support increased community understanding of the importance of the visitor economy to the tourism region and how the community can support VIS delivery (e.g. creating local ambassadors).

Developing the framework: foundation elements

Framework aim

Taking a visitor-centric approach (meeting customer and industry needs), determine what VIS is needed where, when and how to maximise visitation, length of stay and spend.

Look to identify opportunities to increase consistency, efficiency and quality of VIS delivery (e.g. reduce duplication of activities, effort and resources).

Regional VIS goals

Consider where regional VIS 'sits' in terms of tourism region destination management and marketing. VIS needs to be well planned and aligned with regional plans and strategies. Develop VIS goals aligned with regional tourism performance targets and goals.

Developing the framework: who it will serve

Visitors to the region

Look at current visitation (origin, purpose, length of stay, spend) – who is coming as well as who isn't.

Agree on target visitors for the region, what their needs and wants are and how they would like to engage with VIS pre, during and post visit.

Include locals (residents and businesses) in visitor attraction considerations (visitors in their 'own backyard' plus providers of advice to visiting friends and relatives).

Developing the framework: how services could be delivered

Face-to-face delivery

Consider what model fits the tourism region best in order to provide the right level of face-to-face visitor service delivery in the right locations, at the right time and by the right people.

Key considerations include:

- maximising the benefit of visitor engagement with local face-to-face visitor information providers to drive length of stay and spend in the region
- ensuring that delivery of face-to-face visitor services maximises value of funding and resource investment.

Hub & Spoke model - VICs and VIOs

The relationship between VICs and VIOs, particularly in regional areas, often takes the form of a 'hub and spoke' model. At its best, this model provides for the spread of face-to-face information services according to the needs and travel patterns of visitors to a particular region.

Numerous reports have noted that a more holistic view of visitor needs is extending the reach of bricks and mortar Visitor Information Centres, opening up new options in the delivery of the face-to-face interactions, for example, pop-ups, mobile delivery, touchscreens and roving ambassadors. In addition, operational practice and industry standards are

increasingly reflecting the evidence that visitors want access to a range of information sources and channels.

The following aspects of VIS can now be accredited (under the umbrella of a Hub VIC):

- Hub Visitor Information Centre
- Satellite Visitor Information Centre
- Seasonal Visitor Information Centre
- Ancillary
- Pop-up
- Ambassadors
- Digital platforms
- Static display and digital display
- Mobile visitor booth for events.

Establishment of a hub VIC

Consider the opportunity to have one 'hub' / destination regional VIC funded collaboratively (offset by profitable revenue streams) and supported with other forms of VIS including digital, VIOs, mobile / pop-up delivery. The hub VIC could provide services to the whole tourism region (apply resources where they can have the most impact) and support for other delivery partners.

Strategic role of VICs

Consider:

- the potential advantages of converting VICs to VIOs (reduce requirements on staffing, opening hours etc.) and / or replace / complement with mobile / pop-up VIS delivery; and potential disadvantages including loss of the benefits of use of yellow 'i' signage

- the effectiveness of VIS delivery (visitor experience, requirements on staff etc.) where services are currently co-delivered with Local Government services (e.g. library services)

- opportunities for specialisation of VICs within the region – e.g. gaining and sharing of knowledge and expertise in certain areas such as data gathering, digital delivery, working with volunteers etc. (not each VIC has to be the ideal model in all areas); look at key strengths, areas of particular expertise.

VIC locations

Consider best practice:

- Central location - close to retail, cafes etc. to promote incremental spend
- Engage with visitors in high foot traffic areas e.g. CBD or at key attractions
- Co-location with attractions e.g. gallery
- Capture visitors entering the area from key routes

Common traits of successful VICs

Consider those presented by Sandwalk Partners in their presentation to the VTIC 2016 Visitor Information Centre Summit. According to their research, successful VICs:

- are visitor destinations in their own right

- have clear and consistent branding across web, signage and displays

- are highly visible, in high-traffic locations servicing locals and visitors

- have a contemporary 'Apple store' design, with adaptable fixtures and fittings

- offer traditional maps and brochures integrated with digital technology

- are operated by skilled, knowledgeable and multilingual staff (supported by informed volunteers), providing a highly valued interface between visitors and various information sources

- focus on 'what's on today/tonight/right now

- have ancillary revenue streams (retail, merchandise, licensing, food and beverage) integrated with experience to underpin their core function

- have a strong web presence as first contact point

- include an integrated mix of onsite digital technologies (web-kiosks, digital signage, mobile apps) and traditional maps and brochures

- offer regional displays, stories and experiences that provide a sample of what visitors can see and do.

- encourage visitors to see the key role of VICs to be the provider of credible, authoritative and unbiased information

- enable visitors to use online channels to look at and book tourism products, while also providing the highly valued opportunity to speak to knowledgeable and friendly locals

- provide visitors with what they are seeking when they visit a Visitor Information Centre - friendly, unbiased advice.

VIO locations and services

Consider the average visitor journey and where services are needed, then review options in each of those places to create VIOs, e.g. well-sited businesses (wineries, cafes, supermarkets, service stations) or community facilities (op-shops, craft shops, community shops, museums etc.) to develop a network of information providers.

Determine the level of service delivery required at each VIO; consider potential tiers of service levels and associated requirements, e.g. opening hours, staffing levels, level of knowledge required, information to be provided.

Develop an oversight model including setting and measuring performance against agreed criteria for service delivery, and support mechanisms including information sharing, training and development, networking.

Mobile Kiosks / Pop-ups / Roving Ambassadors

Consider the potential opportunities for use of pop-up / mobile VIS delivery and engagement of roving ambassadors in high traffic areas, at peak times, events etc. and develop initiatives to maximise the benefit of those opportunities. Determine what regional resources / facilities /assets already exist that could be utilised and shared for delivery of pop-up / mobile VIS across the region. Consider what is required (vehicle / stand, promotional materials, staffing etc.) and partnership arrangements that could be developed to create that resource.

Consider development of interactive and intuitive mobile kiosk screen displays, offering apps for download and online concierge advice, located in high visitor traffic areas, e.g. rest areas, historic sites and museums, retail centres and conference spaces.

Examples are provided here, along with links to further information:

St Kilda Visitor Info Kombi

https://stkildamelbourne.com.au/visitor-info/st-kilda-visitor-info-kombi/

The St Kilda Visitor Info Kombi is St Kilda's mobile visitor information centre, operated by volunteers and used at tourism trade events, in public relations and promotional activity. It appears every Sunday at the St Kilda Esplanade Market. It highlights and promotes everything that there is to see, do, eat, drink and experience in St Kilda and the greater City of Port Phillip area.

St Kilda and the City of Port Phillip do not service a permanent VIC, so the Kombi seeks to fill part of the gap.

Baxter Service Station Pop Up Visitor Information Centre

https://www.visitmelbourne.com/regions/Mornington-Peninsula/Travel-information/Visitor-information-centres/Baxter-Service-Station-Pop-Up-Visitor-Information-Centre

Situated at the top end of Mornington Peninsula on the main freeway, this pop-up VIC is located in the Service Station just after the Baxter exit. It is staffed on Friday afternoons and Saturday mornings, with regional displays of information available 24/7.

Fremantle Ambassadors

https://www.fremantle.wa.gov.au/visit/fremantle-visitor-centre

Volunteers provide a friendly face and local knowledge to visitors as one of three types of ambassadors; Visitor Centre Ambassadors based at the Fremantle Visitor Centre and Roving Ambassadors at key tourist locations (both 7 days a week); and Cruise Ship Ambassadors (during cruise ship season between October and April) based at either the Fremantle Passenger Terminal or at free shuttle stops.

Guides of Mt Gambier https://discovermountgambier.com.au/guides/

Tourism Mount Gambier (TMG) received a $20,000 Federal Government Building Better Regions Fund Community Investments grant in July 2018, to implement its Guides of Mount Gambier project (with matched funding from TMG). The project was delivered in partnership with the City of Mount Gambier to 'create a formal professional tour guiding program within the local tourism industry'[1]. The project included TMG working with community stakeholders

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[1] https://www.mountgambier.sa.gov.au/news/guides-of-mount-gambier-funding-boost

to develop content, stories and fact sheets to share Mount Gambier's stories. The business case for the project forecast that in three years the Guides of Mount Gambier program will create an estimated $2.9 million in visitor spend per year[2].

Newcastle Now City Ambassador Program

http://www.newcastlenow.org.au/what-we-do-pages/city-ambassador-program

Newcastle Now coordinates a City Ambassador program with a team of over 50 volunteers who are trained to provide a range of services for its members and visitors to the city:

- Business Referral Ambassadors liaise with member businesses and attend B2Bs to meet members and learn about their business.

- Visitor Service Ambassadors provide roving tourism information services for visitors.

- City Monitor Ambassadors act as ears and eyes on the streets and report on cleanliness, safety and crime prevention.

- Promotional Ambassadors distribute relevant promotional material to member businesses and visitors.

- Event Ambassadors work as information guides, ushers and set up crew at large-scale events happening in the city.

Digital delivery

Consider existing regional digital delivery mechanisms, potential initiatives for improvement and staging of implementation. Develop initiatives that support integration of technology into the overall visitor experience and provide a seamless transition from digital to face-to-face delivery and back.

Branding

Consider regional branding and the role of sub-brands; how the destination and sub-brands work together and alignment with the regional destination marketing strategy.

Potential benefits of such a review:

- remove/reduce consumer confusion (and potential lost visitation and revenue)

- ensure information is up-to- date and consistent

- improve search engine optimisation

- reduce duplication of effort

- share resources and establish roles and responsibilities to support -

  o regional brand website development and ongoing maintenance

  o regional social media communications delivery

  o planning and management of a regional presence on third party sites such as TripAdvisor, Google My Business, and sources of online information, e.g. Wikipedia.

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[2] https://www.mountgambier.sa.gov.au/news/guides-of-mount-gambier-funding-boost

Destination (Region) Website

Attributes:

- Maximise digital availability of up-to-date, accurate and user-friendly information for visitor access pre, during and post visit (central source, easy to find, easy to navigate, minimise number of steps to booking)

- Capacity to create a 'shopping basket' for products and experiences to create a personalised itinerary (direct access on customer-own device or used as a tool by VIC staff on site); and capacity to email or print itinerary

- Digital maps

- 'Ask a local' webchat

- Opportunities to create a visitor database for communications post-visit (development of relationships)

Key enablers:

- High-quality digital content from operators

- Products and experiences registered on ATDW

- Strong digital connectivity

- Tech-savvy staff and volunteers

Touchscreens

Examples are provided here, along with links to further information:

Canberra VIC

https://visitcanberra.com.au/canberra-and-region-visitors-centre

A touchscreen in the VIC allows visitors to orientate themselves, see what's nearby and create mini itineraries, taking in a range of attractions, events and experiences. The content is drawn from ATDW. To ensure the VIC's service is where visitors are, touchscreens are planned at key hotspots such as Canberra Airport, National Arboretum, Tidbinbilla Nature Reserve and a regional location. The touchscreen content will be fed and managed by the Centre to ensure consistency in coverage.

Augusta Visitor Information Hubs

https://www.margaretriver.com/services/visitor-centres/

Following the closure of Augusta Visitor Centre (in WA) in February 2019, Visitor Information Hubs have been installed at two locations on its main street (at a newsagency and at a café). Visitors to the hubs can pick up a free map and browse information available through an easy-to-use touchscreen.

Mackay Visitor Information Centre Touch Table

https://www.mackayregion.com/mackay-visitor-information-centre

An interactive touch table, featuring multi-user compatibility, enables visitors to find, research and book tours and accommodation across the region.

Virtual Reality

VR technology can provide visitors with sensory experiences about attractions and activities in the region.

Examples are provided here, along with links to further information:

Tourism Whitsundays Queensland

https://www.tourismwhitsundays.com.au/images/atwcorporate/mediareleases/Media-Release---181101-Visitors-to-experience-Whitsundays-in-Virtual-Reality-Installation.pdf

A Virtual Reality Installation at the Bowen Visitor Information Centre allows visitors to explore the Whitsundays region through a touchscreen, computer-generated-imagery (CGI) interactive map and via a virtual reality (VR) headset that transports the viewer to several hero experiences. Visitors can also purchase a cardboard virtual reality headset and download the free Visit Whitsundays app to take the virtual experiences home with them and share with family and friends.

Swan Hill - Discover More

https://www.swanhill.vic.gov.au/2017/10/a-taste-of-swan-hill-through-virtual-reality/

A virtual reality touring experience of the Swan Hill region highlighting the region's landscape, unique history and key tourist attractions using videos, photospheres, photos and maps. It is a free tool that can be accessed on all mobile, tablet and desktop devices through the Visit Swan Hill website. The information and experiences include visualising what streetscapes looked like 100 years ago, interactive videos that link to current events or the ability to explore accommodation options. A 'where to mapping' tool provides users with easy-to-follow directions to find featured locations, using digital mapping devices. Provided at www.visitswanhill.com.au and visitors to the information centre can access using VR glasses or the designated iPad.

VisitCanberra Virtual Reality

https://visitcanberra.com.au/canberra-and-region-visitors-centre

The Canberra VIC Virtual Tour will feature VR experiences at tourist attractions such as the National Zoo and Aquarium, the Canberra Glassworks, Corin Forest and Tidbinbilla Nature Reserve and will provide visitors with an authentic look at what they can expect to see and do. The VR packages will provide a teaser and entice the visitor to include one or more of these attractions on their holiday itinerary.

Port Pirie Visitor Information Centre

https://www.pirie.sa.gov.au/page.aspx?u=747#.XSB2-ugzY2w

An interactive experience simulates a shark cage dive.

Unearth Whyalla

https://www.whyalla.com/cuttlefestopening

A virtual reality 3D goggle experience at the Whyalla Visitor Centre that enables visitors to experience what it is like to swim with Whyalla's Giant Australian cuttlefish.

Mobile Apps

Travelers use their devices to call up real-time advice based on pre-set profiles, past travel patterns, peer group preferences and emerging behaviour while in the destination.

Examples are provided here, along with links to further information:

Tourism WA Experience Extraordinary mobile app

https://www.westernaustralia.com/en/plan_your_trip/pages/experience-wa-mobile-app.aspx#/

The Experience WA App helps visitors to choose what to do during their visit to WA. The app allows visitors to save things that interest them, with the app learning the visitor's interests to personalise its suggestions.

Queensland Tourism & Events mobile app

https://teq.queensland.com/vic-portal/vic-app

The 'This is Queensland' app encourages visitors to use their smartphone to locate their nearest VIC, and also provides local tips on attractions, events, accommodation and Wi-Fi hotspots.

Margaret River Region mobile app

https://www.margaretriver.com/mobile-app/

App 'Your Margaret River region' – available online and offline – features over 1,000 things to do, location of service points etc.

The app includes the following information and functionality:

- Visitors can search for attractions, activities and tours, wineries, restaurants, breweries and cafes, accommodation

- Places of interest are listed by things to do on sunny days, rainy days or with families, with details of what is open on school and public holidays

- Essential information (public restrooms, waste disposal, camping etc.)

- Busselton Audio Tours

- Local weather forecast

- Integrated maps and directions

Developing the framework: management and oversight

Consider the potential benefits of regionalised / centralised management of and oversight of face-to-face VIS delivery, including consistent service delivery, improved efficiency and reduced duplication of effort; and clearly defined roles and responsibilities for regional stakeholders.

Performance measurement and reporting

Develop a data gathering and reporting framework in line with regional VIS performance targets, including an annual review.

Consider:

- what data and information can and should be captured to inform future delivery and stakeholder plans and strategies, and to communicate and demonstrate the value of VIS to the regional visitor economy.

- developing performance criteria and measures for tourism region VIS delivery (VICs, VIOs, 'other face-to-face' and digital delivery).

- the best ways to engage with visitors to gather the data to measure performance (VICs, VIOs, 'other face-to-face' and digital delivery)

- engaging with industry to measure performance from its perspective, e.g. by conducting an operator survey (validation of value of VIS and measurement of regional performance)

- consolidating reporting – produce collaborative reporting against agreed regional VIS performance criteria.

Stakeholder roles and responsibilities and partnership opportunities

Determine stakeholder roles and responsibilities in achieving regional VIS goals (e.g. leading or supporting) in line with stakeholder strengths, agreed level of engagement and existing resources, skills, knowledge and capability.

Develop a governance model to implement the framework e.g. an MoU setting out how tourism regional partners will work together in planning and delivering VIS, or service agreements to manage expectations between partners.

Consider opportunities for sharing of resources; aiming for streamlined delivery and best use of available funding, staff and volunteer resources. Set out who will do what, when and how it will be funded / resourced.

Tourism region volunteer attraction and retention

Involving volunteers in face-to-face VIS delivery has a range of benefits including improving the financial sustainability of VIS delivery, increasing opportunities for volunteerism, increasing the number of local ambassadors and, importantly, increasing the opportunity for visitor interaction with local people.

Consider engaging regional stakeholders to develop initiatives for volunteer attraction and retention that consider:

- engagement with youth - develop partnerships with local schools, university outreach programs, TAFE, employment providers etc. with the aim of recruiting younger skilled volunteers who are IT savvy.

- creating pathways to employment - work with RDA and local employment providers to create pathways to employment that utilise volunteering in VIS as a launching pad to paid employment. Look at opportunities for volunteers to receive recognition for training and on-the-job learning.

- developing a volunteer support framework - work with volunteer managers across the tourism region to develop a framework of support that assists in increasing quality and consistency of VIS delivery and retention of volunteers, e.g. mechanisms for regular communication and a volunteer mentor program.

Appendix 2 - Regions and stakeholders

The Legatus Central Local Government Region

There are 15 member Councils in the Legatus Group, as shown below:
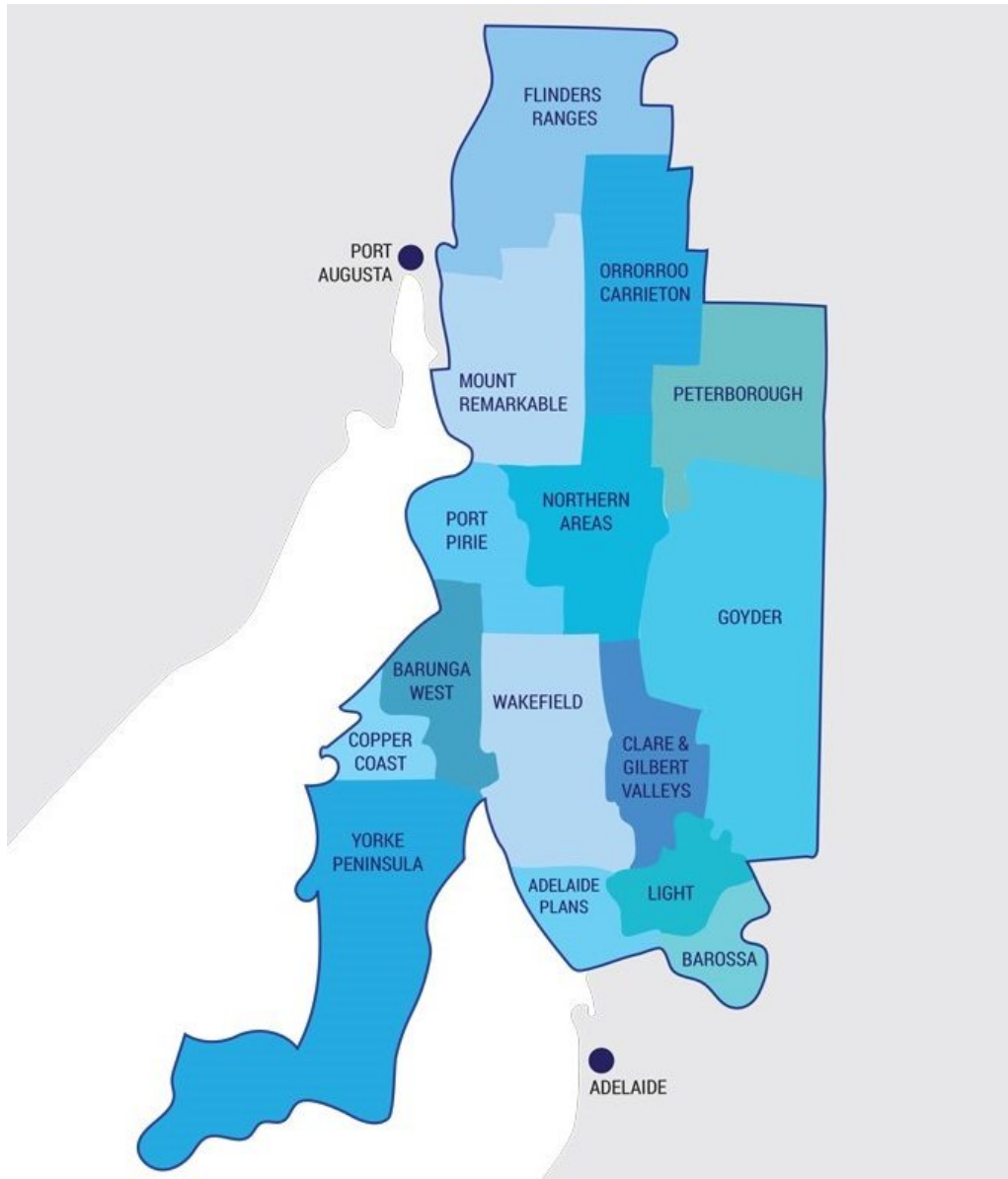
Legatus member Councils within SA tourism regions
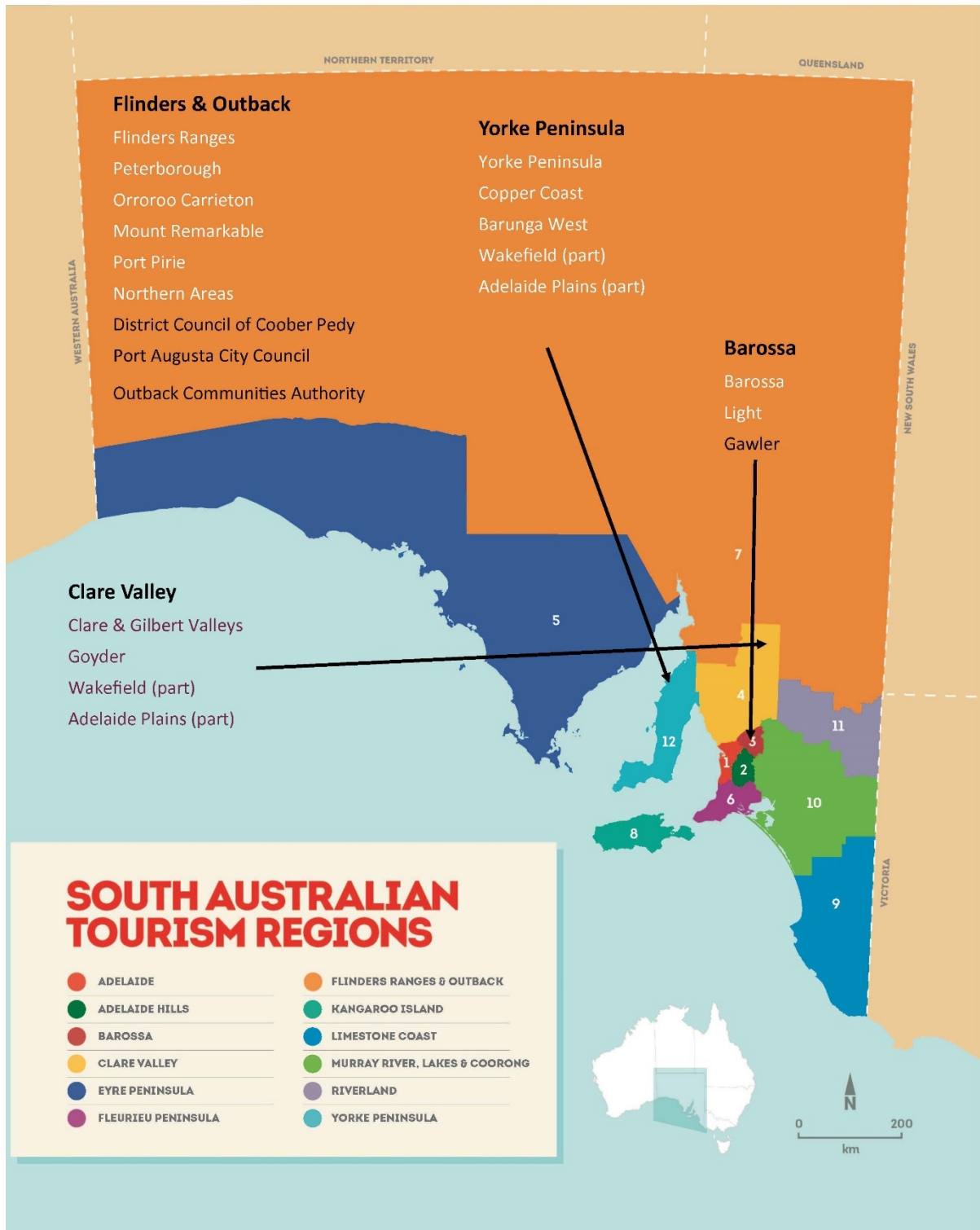
The Legatus Central Local Government Region sits across the four tourism regions of Barossa, Clare Valley, Flinders Ranges and Outback and Yorke Peninsula. The Legatus member Councils are located within those tourism regions as shown below:

The Town of Gawler, while included in the tourism region of Barossa, is not a Legatus member Council and so was not included in this project. However, representatives of that Council were invited to participate in the in-region consultation. Wakefield Regional Council and Adelaide Plains Council are included in both the Clare and Yorke Peninsula tourism regions.

There are nine Local Government areas included in the Flinders Ranges and Outback tourism region, six of which sit in the Legatus region. For the purposes of marketing and collaboration, key tourism stakeholders in these areas (including Local Government) collaborate as the 'Southern Flinders Ranges' tourism (sub)region (note that the region is not recognised as a separate tourism region by SATC).

Tourism partners and stakeholders

The delivery of all tourism-related services requires the contribution of many different individuals and organisations. In its latest plan for the SA visitor economy sector (currently in draft form), SATC noted the importance of collaboration and partnerships among the following stakeholders:

- individual tourism operators

- RTOs

- local tourism associations

- industry in general

- Industry organisations, including TiCSA

- VIC Network (state and national)

- SATC and Tourism Australia

- Government departments: Tourism, Trade and Investment; Environment and Water; Primary Industries and Regions; Planning Transport and Infrastructure, Arts, Treasury

- Adelaide Convention Centre, Adelaide Convention Bureau

- RDA

- Local Government Association and Councils

- educational institutions, including universities and vocational training centres

- other states and territories.

Appendix 3: Audit of current service delivery

Process

The review of current VIS for the Legatus region was primarily undertaken via analysis of information provided in response to a tailored questionnaire for each of the four tourism regions within the Legatus region of 15 Councils. The questionnaire covered digital and face-to-face delivery, resourcing, and staffing (both paid and volunteers) and was designed to create a picture of the 'what, where and how' of VIS. We also sought views about the challenges and opportunities in the delivery of VIS now and in the future.

Detailed audit information and a gap analysis for VIS in each tourism region is included in an accompanying **Legatus Group Tourism Visitor Information Services Situational Analysis** document.

The size of the portfolio of VIS providers across the Legatus region is considerable as is the geographic spread of physical delivery sites. The extent of the 'audit' of VIS for each of the 15 Legatus member Councils was necessarily constrained by project budget limitations.

The Situation Analysis includes data and information gathered for each tourism region including:

- a description of current VIS delivery

- a high-level audit of regional assets, resourcing and staffing (paid and volunteers)

- identification of current Local Government, community and industry contribution and involvement, planned changes to VIS, and relevant local strategies and plans.

Snapshot of Legatus region VIS

The model for VIS delivery across each of the four tourism regions within the Legatus region differs considerably from region to region. Key differences include:

- the nature of relationships

- levels of regional tourism partner financial and in-kind support

- service levels, structures and models of delivery

- levels of 'tourism industry maturity' (e.g. number of businesses on ATDW and industry engagement).

There are also key commonalities, including:

- the level of commitment from Local Government

- the commitment and passion of the VIS provider network

- the challenges in successfully establishing a shared community understanding of the value of the visitor economy and VIS.

Additional commonalities include tourism infrastructure challenges (e.g. digital connectivity) and the lack of resources of RTOs in each region to facilitate collaboration and regional coordination of VIS.

Whilst relationships between RTOs, RDA, Local Government and VIS providers in each region are positive, a significant amount of planning, delivery and cost-bearing is done on an individual Local Government area rather than collective region basis.

Qualitative information gathered via the questionnaires to the Legatus VIS network, along with consultation with key stakeholders, provided key insights that have informed the recommendation for the transition to a Tourism Region VIS model.

Key insights about current VIS delivery for the Legatus region are highlighted below.

Current face-to-face delivery

Current face-to-face VIS delivery is provided by the nine accredited VICs and 30 non-accredited VIOs across the Legatus region. VIS is delivered primarily by Local Government, supported by volunteers without whom, in most cases, services could not be viably delivered. Local community, progress and industry associations and the private sector also provide VIS either as a VIC, VIO or informal information provider.

Visitor Information Centres

Location and focus

In the Barossa tourism region, significant investment in contemporary service delivery is currently being made by The Barossa Council in the upgrading and reimagining of the visitor experience at the Barossa VIC in Tanunda. On completion, the centre will provide an immersive visitor experience and create opportunities for local food, wine and arts industries, showcasing of product, and storytelling to drive visitation and spend.

Similarly, Light Regional Council is also investing in the development of its VIC co-located Kidman Museum to draw people both to Kapunda and the VIC. This Council is also developing a website and social media to promote the visitor appeal of its separate brand 'Light South Australia' that will be supported via face-to-face experience delivery at the VIC.

In the Clare Valley tourism region, the Clare Valley Wine Food & Tourism Centre, located just outside the township of Clare, is operated by an incorporated association with funding from Clare & Gilbert Valleys Council. Whilst its core role is as a VIC, the centre also plays key support roles in providing a retail outlet for the Clare Valley food and arts industries and provides tastings and retail opportunities for the local wine industry. The centre is also located adjacent to a significant accommodation provider.

The other VIC in the Clare Valley tourism region is located in Burra. The Regional Council of Goyder has plans to relocate the VIC to a soon-to-be-created larger facility, the Burra Cultural Centre, located in a prominent site between the existing regional art gallery and town hall. The new location will provide significant opportunities for development of the visitor experience as well as potential sharing of resources.

Three of the four VICs situated across the Southern Flinders (sub) tourism region (Peterborough, Port Pirie and Flinders Ranges) are operated by Local Government; with the fourth VIC (Hawker) being uniquely privately owned and operated. The Peterborough VIC is co-located with the Steamtown Heritage Rail Centre, a significant drawcard to the area. The

Flinders Ranges VIC (located in Quorn) is co-located with the Pichi Richi Preservation Society Museum and Quorn Railway Station. The Hawker VIC has, for over 50 years, been operated by Hawker Motors. The VIC includes a museum, is opposite a gallery, and also provides a range of customer services on behalf of the Flinders Ranges Council. The Port Pirie VIC (Port Pirie Regional Tourism and Arts Centre) is co-located with the library, regional gallery and Stateliner Bus Terminal, and is adjacent to a Recreational Vehicle Park.

As part of recommended future regional VIS delivery discussions, it is suggested that stakeholders in each of these regions consider the potential merits of developing a hub-and-spoke approach to delivery and resource sharing.

Several VICs in these regions are also co-located with library services which provides some advantages (e.g. sharing of staff and management), as well as some challenges in terms of expectations of staff (knowledge, skills and experience). It is suggested that this also be considered by stakeholders in future discussions.

The Yorke Peninsula Council recently converted its VIC in Minlaton to a VIO. The tourism region now has one VIC located in Kadina and an extensive network of 12 VIOs strategically located across the region. The VIC is operated and funded solely by the District Council of Copper Coast and is co-located with the Farm Shed Museum, Miniature Railway, a children's play centre and mini golf activity. Whilst co-location and the facilities available at the centre have merits, the current location is unlikely to be providing the most benefit to the region as its only accredited VIC. The District Council of Copper Coast is aware of the current location limitations which will be addressed in future planning discussions.

Financial sustainability

In all four tourism regions, Local Government invests significant funds in 'bricks and mortar' VIS delivery via the VICs, with current investment roughly estimated at around $2.5 million p.a. As previously outlined in this report, the ongoing provision of this funding is integral to regional VIS delivery and the sustainability and growth of the regional visitor economy. In some cases, funding is also provided by tourism businesses ('pay to play' promotion of businesses outside the council area) and by industry associations (e.g. towards participation by the VIC at trade events). Support is also provided by RDA and industry associations in the form of networking, training and development and in digital VIS delivery.

VICs engage to varying levels in revenue-generating activities, including booking commissions (accommodation, tourism products and experiences and events), retail sales, café sales and direct provision of tourism experiences (e.g. fee-based tours). In generating this activity, VICs balance the desire to reduce the net impost on Local Government funding with the need to support and not unfairly or unnecessarily compete with the private sector. The cost of management of these revenue-generating activities (e.g. staff time (management and sales), procurement, supplier relations, stock management) and profits also need to be considered in terms of assessment of net financial benefit.

There are currently around 26 (full time equivalent) staff employed in VICs, supported by nearly 90 volunteers who collectively deliver approximately 9,300 hours to VICs per year. The majority of VICS operate with small teams of paid staff supported by a team of volunteers which can impact on the capacity to increase the revenue-generating activity. An opportunity identified in most regions is to provide sales training to staff and volunteers to increase revenue generated.

The number of volunteers engaged by VICs also differs greatly. Whilst the resourcing required to manage a team of volunteers cannot be underestimated, the benefits in engaging them in VIS delivery is significant (both financial and in terms of quality of experience). It is suggested that in future regional discussions, all of the above financial sustainability areas be discussed with the aim of highlighting opportunities to create efficiencies, increase revenue and improve the visitor experience.

Integration of technology

VICs across the region are actively pursuing opportunities to integrate technology into the visitor experience. A good example is the 'Shakka the Shark' interactive cage-diving virtual reality experience at the Port Pirie VIC which simulates a shark cage dive. The Barossa VIC, in its current upgrade, will enhance the visitor experience by the use of technology including video screens/wall and lounge where visitors can watch promotional and educational content on the region, including a selection with subtitles in different languages.

A future opportunity for Legatus VICs may be provided by the SA AVICN project to explore potential collaborative development of a 'touch table' along the lines of that used at the Mackay (Queensland) VIC (https://www.mackayregion.com/mackay-region-visitor-information-centre) which features multi-user compatibility, enabling visitors to find, research and book tours and accommodation across the region.

Data capture and performance reporting

Accredited VICs are required to capture key data in line with accreditation guidelines. This information is provided six-monthly and analysed and shared via the SA AVICN, which uses the data it captures to estimate the economic contribution of VICs to SA. VICs each then have specific stakeholder reporting requirements and key performance indicators that require additional data collection. User generated feedback is also gained via sites such as TripAdvisor (comments and ratings) and via social media.

Visitor Information Outlets

There are currently 30 VIOs located across the Legatus region: three in the Barossa tourism region; seven in the Clare Valley tourism region; eight in the Southern Flinders (sub)region; and 12 in the Yorke Peninsula tourism region. These VIOs are operated by a range of organisations, including private sector businesses, community and progress associations, National Trust SA, and government (State and Local).

Various funding arrangements are in place (quantum and provider) and impact on the level of services provided. Some are based entirely on volunteers (e.g. those run by local community and progress associations), some are entirely staffed (e.g. those run by the private sector and which generally have a lower level of information and service provision – not the business' core focus), and others are a combination of both; that is, minor level of staffing and volunteers.

Local Government in the Legatus region supports VIOs in a range of ways, including via VIC support, operation of VIOs (e.g. District Council of Orroroo Carrieton) and by leasing of Council assets to community and progress associations that then run VIOs with volunteer support. The Yorke Peninsula Council leases several of its caravan parks to local progress associations that use net profits generated to provide VIO services by some paid staff supported by volunteers. Other Councils provide in-kind support including information, printing, training and advice. The Yorke Peninsula Council employs a Visitor Information

Officer who provides support to the 12 VIOs in its area. In some regions, there is minimal interaction with and support to VIOs due to a lack of VIC or RTO resources.

In most cases, VIOs (in line with guidelines set in each region) are each associated with a particular VIC which provides oversight (e.g. compliance with guidelines) and support. The level of support provided to VIOs differs significantly and is impacted by the capacity of the VIC resource and level of regional coordination in each tourism region. A common gap identified is the need to increase the regularity of Visitor Information Provider (VICs and VIOs) meetings (which is also dependent on RTO / VIC resources to coordinate).

Other face-to-face

There is currently minimal face-to-face VIS delivery outside of VICs and VIOs. Several regions have mobile stands that are used at events (regional and trade) and indicate that roving ambassadors are used at times (also at events). In the Yorke Peninsula tourism region, pop-up VIS will be made available at Wallaroo to support cruise ship arrivals from late 2019 / early 2020. Other organisations across the Legatus region provide varying levels of informal VIS include industry associations, local progress and business associations, as well as travel agencies and other businesses associated with the visitor economy (accommodation providers, petrol stations, cafes, cellar doors, hotels, retail outlets).

Digital delivery

The addressing of digital connectivity challenges in regions (mobile blackspots and internet speeds / reliability) will assist greatly in the steady increase of digital integration with face-to-face delivery and requires ongoing advocacy of identified needs to Commonwealth and State Government.

Current digital delivery is primarily via regional websites and social media (reflecting the hero regional tourism brand) and in all four tourism regions is delivered collaboratively by the VICs, RTO and RDA (with roles and responsibilities varying in each region). Regional brand-based information and communication is then supported by sub-regional, attraction and township websites (which in most cases link back to the regional websites) and social media.

Several regions have recently made, or are in the process of making, significant improvements to regional websites, including utilising information available from ATDW, creating or enhancing the capacity of online booking, addition of live web chat, and ease of navigation. Light Regional Council is developing an app that provides information on trails within Light Region. Information is also available to visitors on several townships and trails across the region via the Daytrippa app.

A review of tourism region brand management and the interaction between regional and sub-brands is outside of the scope for this project. However, it is suggested that future regional VIS framework discussions consider existing brand interaction (and hence website and social media communications) with key considerations including removing or reducing consumer confusion (and potential lost visitation and revenue), consistency of information provision, search engine optimisation and reducing duplication of effort. The digital landscape is changing rapidly along with customer needs and wants, requiring constant upgrade and innovation. Opportunities to share costs and benefits regionally will assist in long-term sustainability of VIS delivery.

Physical delivery

Physical VIS includes wayfinding, directional and entry statement signage (region and township), information bays, site-specific interpretative information, and VIC / VIO signage. Due to project scope constraints and existing work being done in each region separately to this project, an audit of physical VIS has not been undertaken.

The '*Eyes on Eyre – A wayfinding coastal access and camping options project – regional findings June 2018*' report notes that wayfinding signage is primarily a shared responsibility between Local Government and State Government (Department of Planning Transport & Infrastructure and Department for Environment and Water). It further notes 'the potential to innovate using QR coding and other digital technologies (e.g. apps) to reduce signage numbers and associated maintenance'.

The SATC has developed a series of touring routes under the banner 'SA Roadtrips' across regional SA, supported by in-region 'lollipop' signage and with tear-off maps. Feedback on this program (as a generator of visitation to regions) was provided to SATC by attendees at the SA AVICN conference in June 2019.

Background (Legatus region) research indicates that several tourism regions and Councils within those regions have reviewed / are reviewing visitor signage in some capacity. It is suggested that as part of regional reviews of VIS that visitor signage planning and delivery requirements be considered. In line with recommendations in the 'Eyes on Eyre' report, broad considerations may include:

- removal or repair of damaged or obsolete signage
- advanced warning notifications prior to attraction turnoffs
- regional gateway visitor information bays
- visitor rest stop information bays
- welcome town entry signage (noting potential for joint Local Government procurement).

Collaboration

Strong relationships exist amongst VIS providers and partners across and outside of the Legatus region. TiCSA provides valuable support and advocacy for the SA AVICN which in turn provides valuable support to its VIC network members. TiCSA and SATC provide support for regional VIS delivery, generally in the form of access to data and research, professional development, skills training and promotion of regions.

In particular, collaboration is very strong in the Yorke Peninsula tourism region, with quarterly Visitor Information Provider meetings being held and highly valued by providers. The Southern Flinders region also collaborates well, with examples including ongoing advocacy for recognition as a tourism region and in planning and review of VIS. In a more general sense, tourism region partners work together on joint initiatives such as website upgrades, attendance at trade shows (e.g. Caravan and Camping, Australian Tourism Exchange) and development of regional publications (e.g. Visitor Guides and maps).

Need for greater collaboration – facilitated by increased RTO capacity

The relationships between VICs, VIOs, industry and Local Government is generally strong across all four tourism regions. However, the regularity of contact, level of collaboration and combining of efforts is significantly impacted by the lack of capacity of RTO resources in each region to lead and coordinate that interaction. Regional VIS providers and partners oftentimes work in isolation, focusing on local area efforts and results rather than on a broader regional approach and benefits.

Resourcing of regional tourism capacity varies across the regions; however, all report a lack of resources sufficient to adequately support regional collaboration around VIS. The lack of capacity of the RTO resources has a significant impact on collaboration within each tourism region (amongst VIS stakeholders) as well as in providing the supporting functions of experience development and in-region marketing.

Due to the scarcity of RTO resourcing, RTOs are in most cases only able to take a limited role as a conduit for collaboration and regional direction-setting for VIS. As a result, there is currently no true regional VIS strategy, framework or delivery in any of the four tourism regions. There is a significant opportunity to increase efficiency and effectiveness of VIS delivery by taking a regional approach; however, achieving this will require leadership and sufficient resources.

Appendix 4: Information review

To provide context to the analysis of the current VIS environment in the Legatus region and to inform the development of recommendations on the delivery of VIS in the future, we reviewed relevant material from a range of sources.

Much research has been undertaken into VIS by local, state, national and international bodies, and many reports have been written that provide excellent background to the development of the plans and strategies that guide the delivery of VIS across Australia, including those located in the Legatus council region. These plans and strategies provide a practical and more action-based perspective that takes into account the unique tourism environment of particular locations and regions.

We understand that many readers of this report are working on a day-to-day or regular basis in the tourism environment and so are already very familiar with the key research and evidence base for the delivery of VIS.

Other readers do not have tourism as a core responsibility in their work and so perhaps are not quite as knowledgeable about VIS.

In the interests of respecting the competing priorities impacting on the available reading time of all readers while acknowledging that some people may wish to learn more about tourism in general and VIS in particular, this information review is structured as follows:

1. Headings refer to knowledge needed to provide context for this Legatus Group Tourism Visitor Information Services Report.

2. Under each heading, a 'snapshot' is given regarding general understandings or findings that are influencing, or could influence, the way VIS are delivered in the region.

3. Under the snapshot, a 'References and reading' box lists the sources of the information provided, along with other material that could be of further interest.

4. A full bibliography is provided at the end of this report.

Our visitors – who they are

Key markets within the SA visitor economy

SATC has identified the following key visitor markets – and their key characteristics - for South Australia:

- International visitors
  - long-staying
  - high spending
  - from both eastern and western hemispheres
  - staying in SA for a variety of reasons, including education
  - low awareness of the tourism experiences SA offers.
- Interstate overnight visitors
  - average-spending

- key markets from Victoria and NSW
- moderate understanding of SA tourism experiences, but knowledge may be out-of-date or inaccurate
- Intrastate overnight visitors
  - South Australians travelling within SA
  - lower spending
  - short itineraries, often to familiar destinations
  - feel they have solid understanding of SA attractions, but knowledge may be outdated
  - short booking lead times
- Domestic day trip visitors
  - Australians away from their homes for more than 4 hours, but who do not stay overnight
  - includes some interstate travel (business purposes), but mostly leisure-purpose trips to nearby locations
  - yield is small, but there are almost 14 million of these trips every year and so overall contribution is significant, especially to tourism regions bordering Adelaide

A market with particular relevance to this project is that of Grey Nomads (generally understood as retired people travelling long distances over a long period, typically in a caravan or motorhome). In its September 2018 SA Tourism Barometer, a quarterly survey of members to measure recent business activity and future outlook, SATIC (now TiCSA), identified Grey Nomads as a factor influencing improved business activity in the SA tourism sector as well as underpinning business confidence in the longer term. This intrastate and interstate market is significant for tourism regions within the Legatus region, including Flinders Ranges and Outback region, the Goyder portion of the Clare Valley region, as well as for the Yorke Peninsula region, particularly in relation to its heritage attractions.

SATC has also identified the core proposition for travel for all of our visitor markets that is unlikely to change; that is, that travellers seek out high-quality immersive or relaxing experiences with friendly customer service that represents good value for their travel dollar.

Also unlikely to change, are the core drawcards for South Australia; namely, our established strengths across food and wine and nature-based tourism, as well as cultural experiences.

Emerging visitor markets

At a national level, since 2009, the Commonwealth Government has taken a long-term view of policy development to support the tourism industry to maximise its economic potential. Most recently, the Tourism 2020 policy has provided a framework for a whole of government approach. In 2018, the Beyond Tourism 2020 Steering Committee (the Committee) was established to report on its vision for the future of the tourism industry. It delivered its report to the Commonwealth Government in December 2018.

Within its report, the Committee identified the following emerging visitor markets as important to Australian tourism:

- visitors from China – work is already being done to ensure Australia remains competitive as a destination for these visitors
- visitors from India, South-East Asia and South America – attention needs to also focus on these other emerging markets.

At the South Australian level, in its draft visitor economy sector plan, SATC recently also identified visitors from the eastern hemisphere, including China, as SA's strongest-growing market, with growth also expected from traditional western markets.

Other research has been undertaken relating to the growing Asian visitor market that has particular significance for regional tourism. While the scope of this Legatus project is limited to VIS, some of the research and reports reviewed do also contain insights into tourism in Australia's regions that might be useful to provide context and support for an understanding of the importance of tourism to regional communities.

In its 2017-2018 State of the Industry report, for example, Tourism Research Australia (TRA) described how visitors from the growing Asian middle class are less likely to visit regions, with barriers identified as including –

- a lack of information on regional destinations
- perception of times and distances required to visit regional Australia
- the complexities of booking and adding a trip to regional Australia
- insufficient activities and offerings to convert day visitors to overnight visitors.

In a separate report, TRA specifically addressed the potential for regional Australia in the growth of visitation to Australia by Chinese Free and Independent travellers. It considered the fact that this segment of the Chinese visitor market tends not to disperse to regional areas and, when they do, stay for a shorter length of time than other markets. In addition, a significant proportion stay close to Sydney and Melbourne, only making day trips to adjacent regions. The report discussed a number of possible reasons for the low numbers of Chinese visitors exploring regional Australia, with those related to visitor information including:

- regional destination websites that do not follow a Chinese preference for examining a subject in a general sense first before turning to specific details, i.e. learning about the state/territory first, rather than diving straight into available tourism products and experiences
- website content that is too commercially oriented, rather than reflecting Chinese visitor interest in the everyday life of local residents
- lack of practical value of regional websites, with Chinese visitors expecting them not only to provide information but to also serve as booking facilities.

TRA has also conducted research (in 2017) into Chinese Free and Independent Travellers to SA, finding that while Kangaroo Island was well recognised by potential Chinese visitors, other locations were not. From the Legatus Local Government region, only the Barossa was addressed in the research and that was to highlight the need for that tourism region to grow awareness and emphasise its premium food and wine offering in order to attract more Chinese visitors.

TRA did identify a number of ways that information provision to Chinese visitors could be improved, for example, through more Chinese language options in Adelaide airport and on public transport, and by SA destinations working to combat a Chinese visitor perception that regional areas are not as safe as metropolitan destinations.

However, any concerted effort from Councils in the Legatus Local Government region (with the possible exception of the Barossa tourism region) to attract Chinese visitors may not align with SATC priorities; in its 2013 Activating China – 2020 report, SATC acknowledged that the immediate focus of its strategy was Adelaide, and suggested that expectations of overnight regional dispersal of Chinese visitors should be kept low.

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Our visitors – their information needs and wants

When visitors want information

In 2018, the National VICN identified the following VIS 'touch points':

- Dream – when the visitor is deciding where to go

- Plan – when the visitor is confirming destination and tourism activities

- Book – when the visitor is booking major tourism products (flights, some accommodation and some activities)

- Experience – when the visitor, during the visit, continues to book accommodation and experiences

- Advocate – when the visitor shares their experiences with family and friends

In a study of Local Government's involvement in Victoria's visitor economy, the Victorian Tourism Industry Council (VTIC) also found that travellers are looking for inspiration and assistance at all stages of the trip cycle.

Research undertaken by TRA in 2015 looked specifically at why and when visitors sourced information from VICs, as opposed to getting their information online.

The research showed that the use of VICs is driven by situation, rather than visitor type, with the most common reasons for stopping being to get information on attractions, to obtain maps, and to find out about activities.

As to the 'when' of stopping, the study found that tourists are most likely to visit a VIC:

- when they are visiting a location for the first time
- when they haven't accessed enough information before arrival
- when they are staying more than one night.

What information visitors are looking for

In its study of VIS in NSW in 2016, TRA found that prior to a visit, people seek information on accommodation and things to see and do. During a visit, the hunt for things to see and do continues, while people also seek local maps.

Where visitors are getting their information from

According to the National VICN's 2018 research, visitors get their information from:

- VICs
- fixed and mobile internet services
- travel websites
- mobile apps
- online travel agents
- social media
- user-generated content on peer review sites (e.g. TripAdvisor)
- new travel brands – one-stop shops aggregating relevant content (e.g. TripAdvisor, Expedia, Airbnb Trips) – personalised and curated destination content. Visitors can book every facet of their journey.

Earlier research (2016) undertaken by TRA noted that popular information sources pre-visit also includes direct contact with tourism operators and the recommendations of friends and relatives.

How visitors want their information delivered to them

The National VICN identified that visitors want their information to be:

- filtered; they're seeking different topics and types of information at different stages, rather than getting everything at once
- available to them in different formats, with online and digital information tailored to their preferred devices.

References and reading
National Visitor Information Centre Network 2018, *Visitor information servicing: a national perspective.* Tourism Research Australia 2016, *Visitor information servicing in NSW.*

Visitor information services – how they are evolving

Impact of technology

A number of reports, including that published by the Government of Alberta, have cited findings of a Futurist Panel, comprised of international experts in tourism, data, digital strategy and research, which speculated on technology's impact on visitor services in the next 5-10 years. The panel suggested that:

- VICs will become highly interactive digital centres where trip profiles and requirements can be curated and updated

- there will be a move towards satellite visitor services, primarily mobile kiosks

- virtual reality technology will provide visitors with sensory experiences about attractions and activities in the region

- interactive and intuitive mobile kiosk screen displays, offering apps for download and online concierge advice, will be located in high visitor traffic areas, e.g. rest areas, historic sites and museums, retail centres and convention centres

- travellers will use their devices to call up real-time advice based on pre-set profiles, past travel patterns, peer group preferences and emerging behaviour while in the destination.

Changes in visitor behaviour

TRA's State of the Industry report acknowledged some changes in visitor behaviour that are having particular impact on regional tourism, including that both domestic and international visitors are showing a trend towards shorter stays, wherever they travel. In addition, as mentioned previously, visitors from Asian markets are less likely to visit regions than traditional European markets.

SATC has also identified some general trends in visitor behaviour that are changing the way people approach travel and thus will have an impact on all areas of SA's visitor economy, including VIS:

- SA's visitor mix, from both domestic and international markets, will continue to diversify, meaning the concept of a 'typical visitor' will become increasingly difficult to define, although likely to be older than the 'typical' visitor of today

- the current trend towards shorter average length of stay is likely to continue

- expectations of travellers for personalised, high-quality experiences with short lead times will continue

- the impact of technology in the future is impossible to predict, but it can be assumed that visitors will expect tourism businesses to have embraced any new technologies and digital platforms that emerge.

The National VICN also found that there is a trend towards expectations of personalised, tailored service and that this extends to people's expectations regarding information; visitors are seeking to find what will match their particular preferences.

Challenges and opportunities for the future provision of information to visitors

Research consistently shows that visitor information needs, wants and expectations are changing, and that technology is constantly providing new opportunities and challenges for the what, when and how of information provision. VIS are thus occurring in a dynamic and complex environment that challenges VIS providers to respond as necessary to keep visitor information preferences at the forefront and to ensure information services reflect visitor expectations.

In developing a new visitor services model for Alberta in Canada, the Government of Alberta suggested that most visitor information services providers use a passive approach that requires the visitor to seek out the service. It recommended a shift to a model where providers are more proactive in reaching out to engage with visitors, delivering both face-to-face and online trip planning services. The Alberta report also highlighted a need for providers to be more assertive in promoting their services and connecting with both industry and their communities.

This issue was also addressed in the National VICN's strategic direction paper in 2016. Suggested in the paper was that given changing visitor and industry needs in the provision of VIS, a network-wide shift is needed towards a more proactive approach in taking information to the visitor, rather than hoping the visitor will come to the information.

Balancing traditional and new sources of visitor information provision

The best way to deliver visitor information services continues to be a topic of much discussion and debate within the tourism industry. More and more people are connected to and reliant on the online world, with constant technological advancements providing new platforms and channels for seeking and finding information, and for booking and sharing tourism experiences. This has raised questions about the role that physical, 'bricks and mortar' information sources – VICs and VIOs – play in the VIS arena. As acknowledged in the 2019 accreditation guidelines for SA VICs, Local Government investment in tourism is occurring in a climate of digital information provision, stakeholder cost savings, rate capping, regional visitor servicing strategies, and strong competition.

It is well understood, and supported by research, that while travellers are enthusiastic in their use of digital channels to search for, select, and book their tourism experiences, the 'bricks n mortar' of visitor information provision – the VIC – continues to be a key source for informing visitors about local products and local experiences. In its work for the City of Adelaide in 2017, KPMG reported that some visitors have low digital literacy or low digital preference while others, although comfortable with digital information delivery, still want to access face-to-face advice and information from local people, and still want to obtain hard-copy maps and brochures.

Overall, research undertaken by the tourism industry and its stakeholders consistently shows that visitors want a mix of online access to information and face-to-face interactions throughout their journey. This is not to say that the two sources are separate and distinct from each other. A 2019 VTIC report described this mix as 'blended engagement', while in the aforementioned City of Adelaide report, the suggestion is made that technology is not making VICs redundant; rather, technology is providing centres with new information channels and dynamic ways of interacting with visitors.

In New Zealand, i-SITE New Zealand is the country's official visitor information network with over 80 member Visitor Centres around New Zealand. These centres provide information as well as a New Zealand-wide booking service for activities, attractions, accommodation and transport. The brand is managed by Tourism New Zealand, with accredited members needing to meet standards in staff training, professionalism and information technology. Management, administration and marketing of i-SITE New Zealand is largely funded through an annual grant from Tourism New Zealand as well as membership fees.

Individual centres are funded by booking fees and retail sales and are supported by Local Government either directly or indirectly. According to the network's research, over 45% of international visitors to New Zealand use an i-SITE and around two thirds of these say that i-SITEs influenced their decision on their activities, as well as their transport and accommodation choices. Almost one third of all users made their booking at an i-SITE.

References and reading
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Visitor information services – best practice

Visitor information services – Visitor Information Centres and Outlets

In 2018, The National VIC Network identified the Top 5 features that visitors look for in a VIC:

- a welcoming experience
- knowledgeable, professional staff, skilled in customer service

- unbiased, authoritative and tailored information

- validation of research found before and during the trip

- local stories and insights.

The National VIC Network's findings are consistent with older research, including that undertaken by the WA Local Government Association in 2015 that found that visitors see the key role of VICs to be the provider of credible, authoritative and unbiased information. As identified by Haeberlin Consulting in their report into the future of visitor centres in WA, many studies have consistently shown that along with skilled staff and unbiased, authoritative information, visitors want to see regional displays and stories.

Closer to home, a South Australian study, undertaken by TRA and SATC in 2011 and relating specifically to the impact of regional VICs in SA, found that:

- while visitors use online channels to look at and book tourism products, the opportunity to speak to knowledgeable and friendly locals is highly valued

- visitors are seeking friendly, unbiased advice when they visit a VIC.

The SA research also identified the particular types of information that visitors source from VICs:

- maps

- regional guides

- product brochures

- flyers for events or other tourism products

- transport guides and timetables

- parks guides.

In SA, there are 43 VICs that are accredited through their adherence to a national accreditation standard. As previously outlined, there are nine accredited VICs in the Legatus Local Government region.

Some key benefits to accreditation, as noted in the 2016 Adelaide Hills Visitor Information Servicing report by KPPM Strategy include:

- eligibility to use the trademarked yellow italic "i" logo

- access to official DPTI signage on main roads, approach routes and within townships

- assurance to visitors that staff are well trained, knowledgeable and unbiased in recommending and providing correct information

- inclusion on the Tourism Australia, SATC and TiCSA websites

- free listing in the SATC generic and cooperative marketing brochures.

While some staff in the centres are paid, there is generally also a heavy reliance on a volunteer workforce to deliver information services.

There are also over 60 VIOs across SA, with 30 located in the Legatus local government region. These outlets are not accredited and are often operated within local business shopfronts or run by volunteers. They are another source of face-to-face information delivery

to visitors and generally (but not in all regions) are the responsibility of the relevant accredited centre.

The relationship between VICs and VIOs, particularly in regional areas, often takes the form of a 'hub and spoke' model. At its best, this model provides for the spread of face-to-face information services according to the needs and travel patterns of visitors to a particular region.

Numerous reports have noted that a more holistic view of visitor needs is extending the reach of bricks and mortar VICs, opening up new options in the delivery of the face-to-face interactions, for example, pop-ups, mobile delivery, touchscreens and roving ambassadors. In addition, operational practice and industry standards are increasingly reflecting the evidence that visitors want access to a range of information sources and channels. In the recently updated VIC accreditation guidelines, for example, a number of aspects of VIS can now be accredited (though must all be provided under the umbrella of a 'hub' VIC) and include:

- Hub Visitor Information Centre
- Satellite Visitor Information Centre
- Seasonal Visitor Information Centre
- Ancillary
- Pop-up
- Ambassadors
- Digital platforms
- Static display and digital display
- Mobile visitor booth for events.

Challenges and opportunities

The role and resourcing of VICs now and in the future is another topic of regular discussion and debate among tourism stakeholders. VIS providers across Australia and beyond are developing innovative models to enable VICs to fund their own operations to varying degrees. There are also numerous examples of efforts to embed VICs firmly into their communities with the aim of securing and maintaining what is known as the 'social licence' for tourism; the acceptance by the community of the impacts – positive and negative – of tourism.

In a presentation to the VTIC 2016 Visitor Information Centre Summit, Sandwalk Partners identified some common traits of successful VICs. They:

- are visitor destinations in their own right
- have clear and consistent branding across web, signage and displays
- are highly visible, in high-traffic locations servicing locals and visitors
- have a contemporary 'Apple store' design, with adaptable fixtures and fittings
- offer traditional maps and brochures integrated with digital technology

- are operated by skilled, knowledgeable and multilingual staff (supported by informed volunteers), providing a highly valued interface between visitors and various information sources
- focus on 'what's on today/tonight/right now
- have ancillary revenue streams (retail, merchandise, licensing, food and beverage) integrated with experience to underpin their core function
- have a strong web presence as first contact point
- include an integrated mix of onsite digital technologies (web-kiosks, digital signage, mobile apps) and traditional maps and brochures
- offer regional displays, stories and experiences that provide a sample of what visitors can see and do.

In considering what would create a sustainable future for visitor centres in WA, Tourism WA suggested that VICs often focus too heavily on bookings and the sale of tourism products at the expense of their primary role and in competition with others, for example, travel agents and tourism operators. Their ideas for reducing the cost base of VICs included:

- reducing fixed overheads
- outsourcing to larger, nearby visitor centres
- merging, amalgamating and rationalising operations
- co-locating
- utilising pop-up visitor centres and technology
- better utilising established booking channels.

Location and accessibility of VICs was also highlighted as a critical issue by TRA in its NSW study, with particular mention made of the importance of highly visible and centrally located VICs with proximity to local accommodation and tourist attractions or co-location with complementary services. That study also noted the importance of directional VIC signage, particularly for driving spontaneous visitation.

In terms of securing ongoing, operational funding, Tourism WA, in 2014, noted the importance of continual education of Local Government and the community on the value of tourism and the local visitor centre. It also suggested the implementation of local business levies, a concept which was also explored in the ARTN's research into the contribution of Local Government to the Australian tourism industry. It found that, in 2015/16, there was no 'traction' for the introduction of a business levy to fund tourism. However, in more recent times and currently, business levies, along with business sponsorship, are under consideration or being implemented by a number of VICs around Australia.

TRA, again in its study of VIS in NSW, saw commercial sponsorship of VICs as an under-utilised opportunity to increase revenue. That study also highlighted merchandising, booking commissions and complementary commercial services as opportunities for VICs to maximise returns on increasingly limited budgets.

As part of its research into the role of VICs in distributing tourism products in regional SA, TRA and SATC addressed the potential conflict between 'selling' commissionable tourism product and the provision of 'unbiased information' to visitors. Tourism operators consulted

during the research identified their own barriers to supplying commissionable products to the VIC:

- their own resistance to paying commission

- a view that VICs were not professional (from a sales perspective)

- a view that VICs should be primarily responsible for information services, with the selling process best left to the private sector.

The Government of Alberta approached the challenges associated with providing 'unbiased information' to visitors from a slightly different perspective in its development of a new visitor services model. It acknowledged the potential difficulty in balancing the visitor need for personalised recommendations with the obligation to provide equal and objective representation of tourism businesses and services (whether or not commissions are involved), a difficulty also anecdotally reported within regional South Australia. The answer, according to the Alberta model, lies in staff (and volunteers) receiving training in questioning skills to determine the interests and needs of visitors. Identifying appropriate alternative products based on the visitor's answers, staff can then highlight the features of each while giving the visitor the final choice. This approach is seen to be effective in both face-to-face and online interactions.

The National VIC Network suggested that VICs can fill a number of roles within a community, including:

- being a shopfront that offers a warm welcome to visitors to the region

- offering peace of mind and ease of access for visitors seeking authoritative, unbiased and comprehensive information

- being the 'go-to place' for current and up-to-date information for visitors and residents on road conditions and in the event of natural disasters

- being a source of community pride

- offering support for local producers and artisans where they are showcased and sold through the centre

- providing a central hub for local residents, the tourism industry and other businesses to engage

- enhancing community amenity; tourism growth can facilitate conservation, preservation and restoration of natural and built resources

- offering local services not currently met by the private sector, for example, book exchanges, walking tours, vehicle charging points.

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Western Australia Local Government Association 2015, *Local government and tourism: Discussion paper.*

Visitor information services – digital and online

Challenges and opportunities

In any tourism region, the key challenge to effective and efficient digital and online VIS is connectivity. This was recognised by the nationally focused Beyond 2020 Steering Committee which reported to the Australian Government that online connectivity is crucial to the future of Australian tourism and that destinations – wherever they are across the country – need to ensure their network is fast and easily accessible.

In 2019, SATC identified some of the challenges arising from lack of telecommunications accessibility in many SA tourism regions. These include the impact for visitors: on their safety; on their ability to conduct last-minute research and use digital maps; and on their ability to use social media for sharing of experiences. There is also an impact on tourism operators who require solid telecommunications infrastructure to conduct business; in particular, transactions and promotions. In March 2019, the South Australian Regional Visitor Strategy Steering Committee identified addressing key telecommunications blackspots as the number one shared priority of SA's 11 tourism regions.

How others are responding to the challenges and opportunities

The Beyond 2020 Steering Committee proposed a number of actions for implementation through the next national tourism strategy, with one involving investment in technology

solutions to improve the availability of high-speed internet and encouragement of Australia's tourism regions to keep pace with technological advancements.

Visitor information services – mixed model

In developing its national perspective report on VIS in 2018, the National VICN summarised insights from research, literature and VIS practice nationally and internationally. Not reproduced here but included in the aforementioned report are many interesting case studies that consider what has worked well – and what has not worked well – for VIS providers around Australia. These case studies (and their providers) include:

- Getting the storytelling right (Malanda Visitor Information Centre, Queensland, p20 and p38)

- Innovative ideas to improve performance with limited funds (Southern Highlands Welcome Centre, NSW, p21)

- Redesigning business model/virtual reality experiences (Albany Visitor Information Centre, WA, p22 and p35)

- Community partnerships to support tourism (Julia Creek, Queensland, p25)

- VIC run by volunteers, operating café, function rooms and events to generate economic returns for the community (Rural Hinterland Visitor Information Centre, Queensland, p26)

- VIC as an attraction in its own right (Lismore Visitor Information Centre, NSW, p38

- Temporarily filling service gaps and demonstrating market opportunities for businesses (Alice Springs Visitor Information Centre, NT, p39 and p45

- Collaborating with local businesses to build a culture where "visitor servicing is everyone's business' (Yarra Ranges Tourism, Victoria, p43).

A review for the City of Mount Gambier in 2017 considered the integration of technology with face-to-face VIS delivery. Whilst most of the review's recommendations focus on improving the digital information available to visitors, the review report also highlights the importance of face-to-face interaction that add value to digital delivery through a local person providing personalised recommendations, stories and detail.

Challenges and opportunities

It is well understood within the tourism industry that the contribution of volunteers is vital to the delivery of the information services that visitors seek. Along with paid staff, they are valued by visitors for their warm welcome, their sharing of deep local knowledge and for the opportunity for engagement with real local people providing authentic advice and recommendations. VIS provides an opportunity for local volunteerism and engagement in local communities that leads to creation of knowledgeable local ambassadors. With increasing integration of digital and face-to-face delivery and increasing requirement for flexible and mobile face-to-face delivery, it is essential to ensure that staff and volunteers are sufficiently knowledgeable and tech savvy.

The mixed model of VIS also requires rethinking of the data and information required to measure VIS delivery performance. Historical tracking of data specific to VICs alone will no longer be reflective of activity or performance in VIS. As noted in the aforementioned review

of VIS in Mount Gambier, the monitoring of overall visitation rather than number of people visiting a VIC will be more successful in supporting the growth of the visitor economy.

Aligning with regional and local priorities

In building or growing visitor information services for any of the tourism regions within the Legatus Central Local Government Region, Councils should be guided in part by the SA Regional visitor strategy 2020, developed by SATC in 2018. The strategy is applicable to all aspects of tourism, including VIS. The key aims of the strategy are to:

- create alignment between SATC's research about visitor needs and regional priorities
- consider the five pillars of sustainability (regional marketing, dispersal, infrastructure, product development and industry capability)
- link to the State Tourism 2020 Plan (and, presumably, to the latest state plan which is currently under development)
- foster collaboration across regional boundaries
- translate easily into regional strategies.

While some of the strategy's priorities are directed to tourism operators, they are relevant also to providers of visitor information services. Other priorities relate more directly to visitor information services. Some key priorities include:

- the building of industry capability – in digital marketing, event management, working with distribution intermediaries, business management, customer service, understanding the emerging Chinese market
- borderless collaboration – closer alignment of VICs with the strategies of regional tourism organisations
- ensuring visitor information services are meeting changing visitor needs – when and where they need it
- ensuring strong linkages between Councils and tourism associations
- encouraging greater cross-Council collaborations to maximise investment and impact
- increasing the effectiveness of VICs and VIOs, including the development of digital capabilities.

The strategy addresses tourism-related priorities for each of SA's tourism regions. Specific VIS priorities for tourism regions within Legatus Central Local Government Region are listed below:

Barossa

- support consumer-facing VIC network services to meet changing visitor needs.

Clare Valley

- strengthen the region's capacity to meet visitor information needs where and when they seek it
- continue to embrace and evolve regional VICs in Clare and Burra.

Flinders Ranges and Outback

- increase the effectiveness of the region's VICs and VIOs, including the development of digital capabilities and on-selling of visitor services.

Yorke Peninsula

- evolve visitor information networks to meet changing visitor needs, drive greater dispersal and spend.

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Visitor information services – role of Local Government

Value of tourism for state. local and regional communities

According to TiCSA (in its April 2019 budget submission to the Treasurer regarding SA visitor economy funding priorities), tourism has significant potential for growth over the next decade. The submission expressed concern that SA has seen a decline in market share of visitor expenditure over the last 10 years, with SA being the worst-performing state for

interstate and intrastate visitor expenditure growth (though performing better for international expenditure; SA ranking third out of the six states).

The submission also addressed what it sees as an inconsistent approach to the management of regional tourism in SA resulting from the withdrawal of funding from SATC, leading to a decline in the share of visitor expenditure between regions and Adelaide.

Advocating streamlined management of regional tourism and VIS, TiCSA acknowledges that while the differences between regions require a tailored approach, there are common fundamental services that RTOs need to deliver, including:

- collaboration – with the key role of the RTO to facilitate relationships between regional stakeholders

- in-region and near-region marketing – with the role of the RTO being to encourage a visitor already in SA to stay longer and spend more

- increasing length of stay and spend – with the role of the RTO to facilitate the development of experiences, including packaging and cross-promoting, and to leverage all local visitor communication and marketing assets.

In 2016, the SA Local Government Association produced a background paper on tourism and Local Government to assist Council Officers, Elected Members and other stakeholders to understand the role of tourism as a driver of regional economies and its capacity to contribute to the social, cultural and environmental wellbeing of communities. The paper acknowledged the contribution that Councils make to tourism through discretionary tourism-related expenditure and through the provision of infrastructure and services that are used both by residents and visitors. It also addressed some of the challenges associated with measuring the impact – economic and otherwise – of tourism on a council area or region. Data and methods of analysis available in 2016 included:

- TRA information detailing visitor numbers, visitor nights and visitor expenditures (subject to data reliability and for Council areas where tourism region boundaries match Council boundaries)

- Regional Tourism Satellite Accounts, also published by TRA

- REMPLAN analysis to consider economic activity in a region, including estimates of direct tourism impacts

- the Tourism Impact Model (TIM) developed in 2004 specifically for Australian Local Government to provide a framework for assessing the economic costs and benefits that accrue to Councils from tourism. Examples are given in the LGA's paper regarding TIM modelling in the Alexandrina and Kangaroo Island council areas.

At a Legatus-region level, the recently produced Southern Flinders Ranges Tourism and Events Strategy and Action Plan acknowledged the importance of tourism to the economic wellbeing of region, stating that tourism expenditure in the Flinders Ranges and Outback as a percentage of total economic output is more than double that for Adelaide.

The Ararat Visitor Economy Strategy 2018-2021 considered the role of Local Government in the context of the current visitor climate, noting the importance of the local community to tourism and the critical role Local Government plays in optimising the visitor potential in an area.

Councils as enablers and facilitators for the visitor economy

The overall contribution that Local Government makes to the visitor economy is widely acknowledged. Research conducted for the ARTN in 2017 involved a survey of Councils across Australia to consider the role that Local Government plays in the visitor economy. Findings particularly relevant to VIS included that, across Australia:

- 35c of every dollar spent on tourism by Local Government in 2015/16 went to operating VICs

- in 2015/16, Local Government in SA allocated the highest proportion of their total tourism spend on operating VICs (55%), and the lowest on destination marketing (7%)

- for 2015/16, one in ten Councils indicated that they had a business levy to fund tourism-related activities; for the majority of Councils across Australia, tourism spending is largely financed by residential and business rates – with some income received through grants and surplus from the operation of tourism commercial entities such as attractions, visitor centres and tourism parks.

As has been found in numerous studies and reports, Local Government involvement in tourism is varied. A WA LGA discussion paper noted that for some Councils, involvement is providing a gateway to a destination, or signage alone; for others, involvement is a raft of infrastructure, amenities and attractions. A recent report by VTIC suggested that, in a general tourism sense, the core role of Councils is to raise community understanding of the value of the visitor economy and that doing so assists:

- communities to understand why Local Government is investing in the visitor economy and how they are maximising the benefits and mitigating unwanted impacts

- the local tourism industry to support community aspirations

- the creation of friendlier communities and thus better visitor experiences

- the creation of community advocates who provide word-of-mouth recommendations to current visitors and encourage their own friends and relatives to visit

- the overall value of the visitor economy to the local area to be better understood when new development applications come before Council

- locals to become involved in volunteering opportunities

- in wider community discussions to ensure a good understanding of the local visitor economy.

Local Government also plays a crucial role in the funding and operation of VICs. A strategic directions paper developed on behalf of the National VCIN reported that of the more than 460 accredited VICs across Australia, over 80% of these are run by Local Government, with most of the others being supported in various ways by Councils.

At a state level, SA's AVICN produced a paper to highlight research that demonstrates the value of VICs to Local Government. The paper looked at the economic benefits of VIC activities in the period 2011 to 2016, summarising visitor numbers and economic benefits as follows:

- total visitors (five-year average): 1,335,926 p.a.

- unplanned spend (five-year average): $121,382,218 p.a.

- FTE jobs created and maintained over five years: 758.6.

At a more local level, a 2017 socio-economic impact assessment of the Clare Valley Wine, Food and Tourism Centre estimated that from a regional perspective (i.e. the Lower North/Clare Valley), the Centre is estimated to support annually $2.23 million of value added in the region (Mid North) and supports directly and indirectly (including the multiplier impact) approximately 23.5 FTE jobs per year.

In the latest SA visitor economy sector plan, currently in draft form, Local Government is identified as a key stakeholder in the growth of the SA visitor economy, with its role including:

- working with Regional Tourism Organisations on activities including investment in public infrastructure, experience development, investment attraction and events

- encouraging local community engagement to be ambassadors for visitors in their area

- taking into account the value of the visitor economy to the local area in broader decision-making.

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Visitor information services – collaborations and partnerships

Research consistently shows the value of collaborations and partnerships in achieving positive outcomes in an environment where resources are dwindling or scarce. As is well known in the tourism industry, travellers do not see council boundaries or tourist-region boundaries. This understanding is reflected in the plans and strategies that frame visitor economy activities in SA. SATIC's 2017/18 Industry Agenda, for example, includes as one of its priorities funding to implement the SA Regional Tourism Strategy via partnerships between RDA, Local Government, State Government and industry to support RTOs and VIS (including VICs).

In its 2018 research to develop a national perspective on visitor information services, the National VICN identified a number of studies currently underway to assess the merits of combining resources to deliver consistent visitor information services. At the time of writing this information review, there are no publicly available findings regarding these studies; however, the summary of their content as described by the National VICN is provided below:

- Great Ocean Road region – The four Councils in the region are considering outsourcing responsibility for VICs to a collective group. Consultants are exploring a suitable model and testing it with key stakeholders

- Bass Coast Shire VIC – a review has considered how to reduce and share costs (through regional collaboration) and re-invest in technology such as self-service kiosks and touch screens to extend services

- Murray Regional Tourism has developed a discussion paper recommending a new system of governance across the Murray region and its sub regions that looks beyond the historical framework of Local Government delivery of visitor information services.

References and reading
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Appendix 5: Stakeholder consultation

The findings of this project and the development of recommendations were informed by a range of stakeholder consultation that included:

- a questionnaire distributed to VIS providers in the Legatus region (findings are detailed in **Appendix 3: Audit of current service delivery**)

- meetings with tourism region stakeholder representatives within the Legatus region, including –

  - **Barossa tourism region:** Cathy Wills (Regional Tourism Manager, Tourism Barossa Inc), Jo Seabrook (Manager Tourism Services, The Barossa Council), Liz Heavey (Tourism Development Manager, Light Regional Council), Lynette Ancell (Senior Visitor Information Centre Officer, Gawler Visitor Information Centre, Town of Gawler)

  - **Clare Valley tourism region:** Miriam Ward (Regional Tourism Manager, RDAYMN), Paula Jones (Centre Manager, Clare Valley Wine Food & Tourism Centre), Pat Kent (Tourism, Arts & Heritage Development Manager, Regional Council of Goyder)

  - **Southern Flinders tourism (sub)region:** Carly Archer (Communications / Tourism Officer (Southern Flinders Ranges) RDAYMN), Glen Christie, Manager – Tourism & Events, Port Pirie Regional Council)

  - **Yorke Peninsula tourism region:** Lynn Spurling (Library & Tourism Coordinator, Copper Coast Council), Wendy Storey (Visitor Information Support Officer, Yorke Peninsula Council), Anne Hammond (Manager Business & Public Relations, Yorke Peninsula Council), Deb Clark (Tourism Manager, Yorke Peninsula Tourism)

- Meetings / discussions with VIS and industry broader representatives including:

  - Dr Peter Cahalan, Manager Regional Partnerships, Destination Development, SATC

  - Shaun de Bruyn, CEO TiCSA

  - Sean Holden, Senior Policy Advisor, LGASA

  - Andy Glen (Chair) and Lynette Ancell (Secretary), VICN.

Key stakeholder workshop

In addition to the consultation described above, a workshop was held with key stakeholders from the Legatus region to discuss early project findings and their implications for future VIS delivery.

Participants at the workshop included:

- Simon Millcock (Legatus), Peter Cahalan (SATC), Kelly-Anne Saffin (CEO, RDAYMN), Andy Glen (VICN)

- Paula Jones (Clare), Pat Kent (Goyder), Liz Heavey (Light Regional Council), Pepper Mickan (Light Regional Council), Carly Archer (RDAYMN), Glen Christie (Port Pirie Regional Council), Jillian Wilson (Flinders Ranges Council).

The purpose of the workshop was to 'road test' with local experts the adoption of a new model of blended, regional, visitor-centric VIS in the Legatus region. The group discussed

key aspects around potential implementation of the model for each of the tourism regions in the Legatus region.

A regional model

With regard to the suggested regional, blended, visitor-centric VIS model, the group was supportive and noted the following:

- Benefits of the implementation of the model would include improvement in the visitor experience, as well as better use of collective resources and strengths (including reduced duplication of effort).

- Increased regional VIS planning would assist in advocacy for additional funding and support.

- A regional VIS framework could potentially lead, in the longer term, to a broadened regional focus for tourism. e.g. having a cross-regional Local Government review of regulation/planning and development processes that hinder development of new tourism products, and cross-regional collaboration on wider funding/resourcing issues, leading to stronger, louder advocacy.

Resources and funding

The resource requirements for development of a regional VIS framework was discussed with the group, highlighting the value of existing internal resources. The Legatus region collectively has a strong cohort of experienced and knowledgeable VIS providers who are currently all applying their expert knowledge predominantly in their local area alone. The benefits of successful collaboration amongst the group and regional application of that expertise would likely be significant. The group saw that the key to unlocking that potential would be the facilitation of regional VIS discussions.

With regard to resources and funding, the group noted the following:

- RTOs would be the logical leader (coordinator of collaboration), but current resource capacity cannot meet that need. The group agreed that either increased funding to RTOs or funding for a Legatus-region-wide resource (short-term) would be required to develop and implement the model

- delivery of a regional VIS framework once developed, will also require funding to deliver. Transition to a regional VIS model will require strong engagement with Local Government partners (at senior management and then Elected Member level) to develop shared funding and resourcing arrangements and regional performance measurement and reporting parameters. Delivery of both VIS and visitor economy performance targets would be made significantly easier with the removal of uncertainty around ongoing funding (regional tourism and VIS)

- the prime current funder of regional VIS is Local Government; the group agreed that retention and best use of these funds is the key aim (noting the current and future funding restraints on Local Government e.g. potential rate capping). Funding from industry is currently contributed (in some, not all regions) via booking commissions which in some regions is limited and declining due to competition from third party booking sites. There is limited capacity for other revenue generation with options including retail sales (product (souvenirs, clothing, art, craft), café, food and wine) and

commercial tourism product and experience delivery which are all limited and dependent on gaps in local industry delivery and capacity of VIC staff and volunteer resources

Brief high-level discussion explored potential future funding sources including the potential for a business levy for tourism (with funds allocated to VIS), a visitor tax and corporate sponsorship. Other options included the potential development of business cases to seek State Government, LGASA research funds, other grant funds and partnerships to achieve outcomes / projects.

These challenges were further explored at separate meetings with each tourism region group to consider the challenges and opportunities particular to each tourism region.

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