

Victorian Visitor Information Centres Futures Project

DECEMBER 2013



Authors

Urban Enterprise

Mike Ruzzene

Fiona Dunn

Todd Ainsaar

ITOURS Australia

Jeff Sharp

Anita Sharp

© Copyright, Urban Enterprise Pty Ltd, August 2013.

This work is copyright. Apart from any use as permitted under Copyright Act 1963, no part may be reproduced without written permission of Urban Enterprise Pty Ltd.

Disclaimer

Neither Urban Enterprise Pty. Ltd. nor any member or employee of Urban Enterprise Pty. Ltd. takes responsibility in any way whatsoever to any person or organisation (other than that for which this report has been prepared) in respect of the information set out in this report, including any errors or omissions therein. In the course of our preparation of this report, projections have been prepared on the basis of assumptions and methodology which have been described in the report. It is possible that some of the assumptions underlying the projections may change. Nevertheless, the professional judgement of the members and employees of Urban Enterprise Pty. Ltd. have been applied in making these assumptions, such that they constitute an understandable basis for estimates and projections. Beyond this, to the extent that the assumptions do not materialise, the estimates and projections of achievable results may vary.

CONTENTS

EXECUTIVE SUMMARY	5		
ABOUT THE EXISTING VICTORIAN NETWORK	5		
VIC USE AND CONSUMPTION	6		
VIC PERFORMANCE	7		
VIC OPERATIONS	7		
VIC DESIGN	7		
TECHNOLOGY AND DIGITAL MEDIA	7		
INFORMATION	8		
BOOKINGS	8		
VICTORIAN VIC NETWORK VISION 2022	9		
RESEARCH NEEDS	11		
1. INTRODUCTION	12		
1.1. BACKGROUND	12		
1.2. APPROACH	12		
1.3. GLOSSARY	13		
PART A ANALYSIS	14		
2. VIC NETWORK AND ACCREDITATION	15		
2.1. INTRODUCTION	15		
2.2. KEY FINDINGS	15		
2.3. BACKGROUND OF ACCREDITATION	16		
2.4. THE ACCREDITATION BRAND	17		
2.5. ROLE OF VICS	17		
2.6. THE VICTORIAN ACCREDITED VIC NETWORK	19		
3. VIC USAGE AND CONSUMPTION	23		
3.1. INTRODUCTION	23		
		3.2. KEY FINDINGS	23
		3.3. USE OF VISITOR INFORMATION CENTRES: AS REPORTED BY VICS	24
		3.4. USE OF VISITOR INFORMATION CENTRES: NATIONAL AND INTERNATIONAL VISITOR SURVEYS	25
		3.5. INFORMATION SOURCES	27
		4. VIC OPERATIONS	30
		4.1. INTRODUCTION	30
		4.2. KEY FINDINGS	30
		4.3. EXISTING CONDITIONS	31
		4.4. CONSULTATION OUTCOMES	36
		4.5. CASE STUDIES: VIC OPERATIONS	37
		5. VIC DESIGN	40
		5.1. INTRODUCTION	40
		5.2. KEY FINDINGS	40
		5.3. EXISTING CONDITIONS	41
		5.4. CONSULTATION OUTCOMES	42
		5.5. CASE STUDIES: VIC DESIGN	43
		6. VIC LOCATION	47
		6.1. INTRODUCTION	47
		6.2. KEY FINDINGS	47
		6.3. EXISTING CONDITIONS	48
		6.4. LOCATION CASE STUDIES	49
		7. DIGITAL MEDIA	51
		7.1. INTRODUCTION	51
		7.2. KEY FINDINGS	51

7.3. CONSUMPTION OF DIGITAL MEDIA	52
7.4. CONSUMER TRENDS AS A CONSEQUENCE OF DIGITAL MEDIA	53
7.5. FUTURE TECHNOLOGY	53
7.6. CONSULTATION OUTCOMES	55
7.7. DIGITAL MEDIA CASE STUDIES	56
8. INFORMATION AND BOOKINGS	61
8.1. INTRODUCTION	61
8.2. KEY FINDINGS	61
8.3. EXISTING CONDITIONS	62
8.4. CONSULTATION OUTCOMES	64
9. ISSUES AND OPPORTUNITIES	65
9.1. INTRODUCTION	65
9.2. ISSUES	65
9.3. OPPORTUNITIES	68
PART B VICTORIAN VIC NETWORK VISION 2022	70
10. ROLE OF VICS	71
11. LEADERSHIP	73
12. MANAGEMENT AND ADMINISTRATION	75
13. PROVISION	77
14. VIC DESIGN	79
15. TECHNOLOGY	80
16. ACTION PLAN	81

EXECUTIVE SUMMARY

BACKGROUND

Tourism Victoria, in conjunction with the Victoria Tourism Industry Council (VTIC), has commissioned Urban Enterprise to undertake an analysis of Visitor Information Centres (VICs) in Victoria in order to propose a vision for the delivery of VICs in 2022.

This study has been prepared in line with the project brief which requested the following tasks be undertaken to establish a future vision for Visitor Information Centres:

- An analysis of the current situation of the accredited VIC network in Victoria. Based on information from the IER survey of VICs;
- An analysis of best practice in VIC operation, service delivery and management using case studies of existing VICs; and
- Determine the future role of VICs in the context of emerging consumer and technological trends and demographic changes.

The vision for Visitor Information Centres is aspirational and draws on best practice and trends in visitor information consumption and technological change. The vision statement will provide a framework for decision makers to consider when investing, reviewing and improving visitor information services.

The document is written for all levels of Government and, in particular, highlights key actions to be considered by stakeholders for improving the Visitor Information Centre network.

Whilst this document is primarily written with regard to Visitor Information Centres in Victoria, it provides other states in Australia with information to assist with their decision making and identifies opportunities for interstate collaboration.

Given the diverse nature of Visitor Information Centre delivery in Victoria, the objectives and respective actions identified may not be relevant to all VICs; however this document strives to provide guidance for decision makers when considering the future of visitor information delivery.

This document is not a policy or position paper, but an independent assessment of the Victorian VIC network which provides recommendations for consideration by VIC stakeholders.

This report is split into two sections:

- Part A - Analysis; and
- Part B - Vision for the VIC network.

ABOUT THE EXISTING VICTORIAN NETWORK

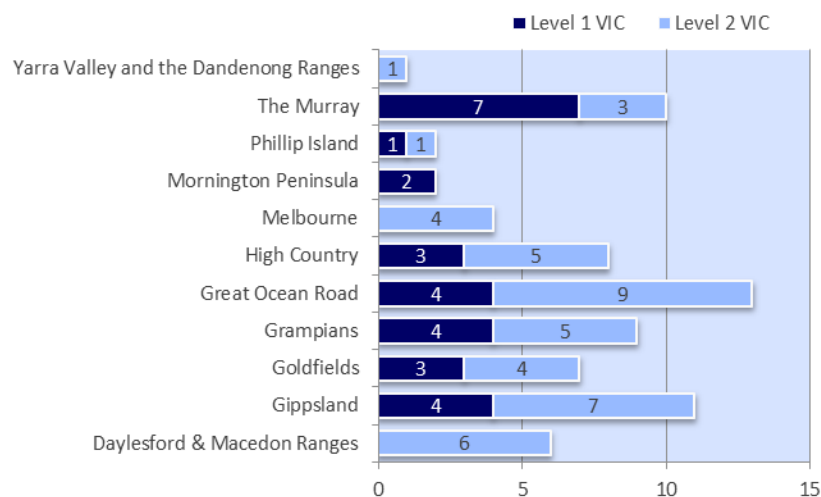
The Visitor Information Centre network in Victoria consists of 73 accredited centres, distributed throughout 11 tourism regions.

The quality and size of centres, roles and responsibilities and services provided by Visitor Information Centres varies greatly across Victoria. Well-resourced VICs often act as gateway centres, whereby they undertake a broad range of activities, well beyond that required by the accreditation guidelines, including:

- Provision of emergency information;
- Research into visitors;
- Provision of tourism business mentoring and education and training;
- Informing and engaging with residents, building an understanding of tourism in the community and strengthening VFR markets;
- Provision of information relating to resident and industry attraction; and
- Providing a hub for the tourism industry in a region.

There are many other VICs in Victoria which have fewer resources and focus primarily on visitor information distribution.

NUMBER OF ACCREDITED VICS BY VICTORIAN REGION



There is great variability in the provision of VICs across the Victorian tourism regions. Regions closer to Melbourne generally had fewer VICs, correlating with the smaller size of these regions.

Whilst generally smaller in size, the regions surrounding Melbourne have a much lower proportion of total walk in visitors captured by VICs than regions further from Melbourne. For example, the Yarra Valley and the Dandenongs VICs captured 0.5% of total visitors and the Mornington Peninsula VICs captured 2.3% of total visitors.

The reason for much lower levels of capture of visitors into VICs for regions which are close to Melbourne may include:

- They have a high proportion of daytrip visitors;
- They have a higher proportion of holiday home owners; or
- Visitors are travelling for a specific attraction, occasion or event.

An analysis of total enquiries as a proportion of total visitors highlights that Mornington Peninsula, the Yarra Valley and the Dandenongs attract much greater levels of enquiry

via alternative methods including email and phone, highlighting the importance of having a range of visitor information services to meet visitor needs.

Locations close to Melbourne need to consider other forms of visitor information services to offset the lower levels of walk in visitors to VICs. This may include the internet, smart phone services and destination based information. City of Melbourne research into the visitor journey indicates that information at accommodation establishments is one of the highest sources of information on arrival.

The data presented in this report highlights that larger regions further from Melbourne, such as The Murray, High Country, The Grampians and the Great Ocean Road have greater capture of walk in visitors as a proportion of total visitors to the region than regions closer to Melbourne. The regions that are more successful at capturing walk in visitors have the following attributes:

- Locations where visitors travel further distance;
- VICs located in regional centres that are also strong tourist destinations;
- A strong touring focus;
- Higher quality, well-located information centres;
- Higher levels of holiday leisure visitors; and
- Are overnight destinations.

VIC USE AND CONSUMPTION

There are two key datasets available which track trends for visitor information consumption. The first dataset is collected by VTIC whereby VICs in Victoria report regularly on enquiries by phone, walk in visitors and by email. This data shows that walk in visitors to VICs in Victoria have declined over the 2009-2011 period by around 2.1% per annum.

The other data source is the National and International Visitor Surveys which tracks visitor use of information centres prior to visit. This dataset highlights a much greater decline of around 20% per annum for domestic visitors' use of information centres prior to visit during the period 2007-2011.

There are significant gaps in tracking visitor information centre use from the demand side. Expanding the questions in the National and International Visitor Surveys to relate to use of

information centres whilst visiting an area would provide valuable data on consumption and trends in the use of VICs.

The slight decline in walk in visitors to VICs (from the survey of information centres) is likely to be related to growth in internet use and, more recently, smart phone use, which allows visitors to access information in the region more readily than previously.

There are some VICs that have reported increased walk in visitation, which is attributed to enhancements to the existing information centre, relocation of the centre or growth in tourism in the region.

It is most likely that VICs overall will continue to experience a decline in walk in visitors as digital information improves and is used more widely across demographic groups.

VIC PERFORMANCE

There is little data available that tracks visitor experience, satisfaction and economic impact from VICs. The last study of this nature in Victoria was undertaken by VTIC (Tourism Alliance) in 2009 across all VICs and took the form of a survey of VIC users. A similar study could be considered again on a biennial basis to collect and understand VIC visitor demographics, experience, satisfaction and economic impact.

Consumers of visitor information services need to be surveyed on a regular basis to understand VIC performance and ability of VICs to grow visitor yield. This data will be important for assessing the performance of the VICs and to put strategies in place to meet visitor needs.

VIC OPERATIONS

There are many different approaches to the management and operational structure of VICs, with VICs being operated by Local Government, Regional Tourism Organisations (RTOs), Local Tourism Organisations (LTOs) and private enterprise.

There is no single model for best practice management of a VIC. There are many Local Government and RTO based structures which work well. Most importantly, the approach to VIC management should include consideration of links to industry and RTOs where appropriate and be mindful of the need for a regional approach to information provision.

In order to provide accurate, relevant information and messages consistent with regional marketing across Victoria, it is important that VICs do not operate in a silo, but rather are

actively engaged with RTOs, Regional Tourism Boards (RTBs) and the local tourism industry.

In Victoria, the majority of VICs are funded by Local Government, which allows VICs to focus on providing independent advice to the visitor. It needs to be acknowledged by funding partners that VICs make an important contribution to creating additional economic benefit to a region, by creating increased yield and visitor dispersal. Funding for VICs comes from a range of sources and whilst Local Government is a key contributor, industry memberships, sales of merchandise and commissions from bookings also contribute to funding for VICs.

It should not be expected that VICs be financially self-sufficient. The measure for the effectiveness of VICs should be indicators such as economic impact, visitor experience and satisfaction and industry growth and performance.

There are substantial resources required to fund VICs, with the average VIC in Victoria requiring \$206,393 of external funding per annum from a mix of Local Government, Regional/Local Tourism Organisations and other sponsors. Investors in VICs must understand the ongoing cost for accredited VICs and that there are many models for information service delivery. Information service delivery needs to be tailored to the destination to meet visitor and industry needs.

VIC DESIGN

Many custom designed VICs in Australia have focused on the aesthetic of the information centre to create an 'iconic' architectural landmark. A rethink of VIC design is required with a much greater focus on the interior layout and design. Extensive investment goes into bespoke designed information centres; however the Launceston VIC provides an example of a small retail shopfront which can house a highly effective information centre. There is little guidance for centres in relation to best practice design. Guidelines for VICs may be considered to assist with providing a standardised and functional approach to VIC layout and appearance.

TECHNOLOGY AND DIGITAL MEDIA

The delivery of new and updated information technology is beyond the resource capabilities of many VICs. This includes the capital to implement new technology and train staff on the technological skills to oversee and operate any new technology. The IER Research survey

conducted as part of this study highlighted that VICs were most concerned with how and what to deliver in the face of emerging technology.

In addition, many VICs are linked to Local Government IT systems and are thus bound by policy which has created significant constraints on the uptake of information technology with information centres.

Many visitors to information centres are seeking face to face engagement with staff or volunteers; however there is much to be done in providing visitors with greater access to high quality, targeted information online to service those visitors who only access digital content.

The internet is the number one tool for accessing visitor information. The “internet age” is now being surpassed by the “mobile age” and with it, visitors’ desire to access, download, upload information whilst on their trip is increasing.

The greatest opportunity in the short term to medium term in relation to digital information is to develop information websites and applications which allow information to be tailored to the visitor’s holiday preferences, timeframes and location. The delivery of this information can occur on a myriad of devices, either personal devices or larger screens at VICs.

INFORMATION

There is a need to consolidate visitor information databases at a regional and state level to ensure that tourism organisations, VICs and visitors can access accurate information. The collection, storage and maintenance of accurate information is important for tourism destination management planning.

The Australian Tourism Data Warehouse provides opportunity for Victorian VICs to store content online in a widely accessible format. This should be explored broadly across the state. VICs should also consider one content management system that links all digital platforms.

Research highlights that around 50% of information sought in VICs relates to product across an entire region, not just a specific destination. This highlights the importance of a regional approach to the provision of visitor information services.

BOOKINGS

The provision of booking systems has become a key element of many larger VICs. Booking systems are often critical for smaller accommodation establishments which do not have a strong online presence or online booking system. Case studies such as Mansfield VIC highlight the importance of regional booking systems during peak times, creating regional dispersal when key destinations are at capacity.

There is a large variation in the provision of online booking services by VICs. VICs that were earlier adopters of online booking systems for accommodation have created a strong position in the booking market. However centres which are now considering adopting new online booking services will be faced with an extensive number of commercial competitors who have entered the market.

VICTORIAN VIC NETWORK VISION 2022

The following 6 vision statements provide an outline of how Visitor Information Centres may be delivered in a changing environment. These provide the basis for specific actions for VIC stakeholders to consider. The table below provides a summary of drivers leading to the vision statement. There is considerable research in the following document which has led to the vision statements, including consultation with VIC Managers, Regional Tourism Organisations/Boards, Local Government, surveys of VICs and case studies of best practice VIC delivery.

CATEGORY	2022 VISION STATEMENTS	DRIVERS	
Role of the VIC Network	VIC networks will broaden their roles and responsibilities beyond the provision of visitor information services to a hub servicing visitors, residents and industry	<ul style="list-style-type: none"> Need to broaden the role of VICs to ensure they remain relevant in the face of changes in information consumption Maximise the physical and ongoing resources dedicated to VICs 	<ul style="list-style-type: none"> Opportunity for VICs to play a critical role in industry liaison and development Opportunity for VICs to grow communities' awareness of tourism and the importance of the VFR market
Leadership	A VIC network that has strong leadership from all levels of Government and tourism organisations	<ul style="list-style-type: none"> Leadership is required with regard to best practice, consumer needs and research There is currently limited coordination between states and there is duplication of activities and research 	<ul style="list-style-type: none"> Opportunity for VICs to link more effectively with regional marketing initiatives
Management and Administration	Transition to a regional networked approach of gateway and satellite visitor information delivery	<ul style="list-style-type: none"> Limited resources for small VICs to deliver digital information services Opportunity to create stronger links between well-resourced VICs and lower resourced VICs Greater economies of scale through a network Around 50% of questions asked at VICs are for the broader region not just the destination being visited 	<ul style="list-style-type: none"> Opportunity for lower resourced VICs to leverage off well-resourced VICs Potential for improved visitor information provision through a regional networked approach Improved consistency in messaging throughout regions

CATEGORY	2022 VISION STATEMENTS	DRIVERS	
Provision	Resources for VICs and services will be tailored to meet visitor consumption and needs	<ul style="list-style-type: none"> • Lack of knowledge about visitor information consumption • Historically, many VICs have been developed without knowledge of visitor needs 	<ul style="list-style-type: none"> • Need to provide greater resources to improve online information services and digital information
VIC Design	The design of VICs will embrace emerging digital technology and focus on providing uncluttered, streamlined and visitor friendly spaces	<ul style="list-style-type: none"> • There are currently no guidelines for VICs when designing information centres • Opportunity to integrate technology into VICs to reduce printed material 	
Technology	Digital information delivery is embraced by VICs	<ul style="list-style-type: none"> • Need to lift digital information delivery in line with visitor expectations: <ul style="list-style-type: none"> • Requirement for Wi-Fi for visitors to access information and social networks on their own devices • Need for applications suited to multiple devices 	<ul style="list-style-type: none"> • Need to implement content management systems to improve information storage and distribution • Need to improve web based information

RESEARCH NEEDS

One of the key issues identified in the preparation of this study was gaps in current research. This made it difficult to definitively understand trends in use, awareness, and benefits of visitor information services. The following are key research projects which need to be undertaken to assist with future decision making in relation to visitor information services:

1. **VIC customer research.** Ongoing survey coordinated across Australia at VICs which targets existing VIC users. This research will collect information on satisfaction, economic impact and information needs.
2. **Visitor use of information.** The National and International Visitor Surveys collect data on visitor information use prior to arrival. The questions in the research should be reviewed to reflect current trends in consumption, particularly with regard to digital information sources, and the use of information in a region.
3. **/ Brand awareness research.** New research is required into the awareness of the accredited "i" amongst travellers. This research should be developed to identify any marketing or brand development strategies which are required for the italic "i".
4. **Ongoing VIC benchmarking survey.** An annual survey of VICs across Australia should be conducted, similar to the research conducted by IER for the VIC Futures Project. This includes gathering information on funding, expenditure, staffing, VIC size and ownership. This will provide trends on VIC performance and management over time and allow for improved decision making by VICs.

1. INTRODUCTION

1.1. BACKGROUND

Tourism Victoria, in conjunction with Victoria Tourism Industry Council (VTIC), has commissioned Urban Enterprise to undertake an analysis of Visitor Information Centres (VICs) in Victoria in order to propose a vision for VICs in Victoria in 2022.

The vision for VICs is one that is aspirational and draws on best practice and trends in visitor information consumption and technological change. The vision statement will provide a framework for decision makers to consider when investing in, reviewing and improving visitor information services.

The document is written primarily for all levels of Government and, in particular, highlights some key actions to be considered by stakeholders in improving the VIC network in Victoria.

Whilst this document is primarily written with regard to VICs in Victoria, it provides other states in Australia with information to assist with their decision making and identifies opportunities for interstate collaboration.

This report investigates the following aspects of VICs to inform this vision:

1. Accreditation;
2. Operations;
3. Design;
4. Location;
5. Consumer Trends and Digital Media;
6. Information; and
7. Bookings.

Each theme is analysed according to existing conditions in VICs, examples of best practice, local, interstate and international case studies and discussion of issues and opportunities.

1.2. APPROACH

The study draws on the following approach:

- Review of existing literature in relation to VICs;
- A survey of VICs in Victoria;
- Case studies of specific VICs in Victoria, interstate and overseas.
- Consultation including:
 - Meetings with various VIC Managers;
 - Meetings with various Regional Tourism Organisation CEOs;
 - Workshops with Visitor Centre Managers; and
 - Discussions with other stakeholders e.g. Economic Development Managers.

In addition to research undertaken by Urban Enterprise, ITours Australia was engaged to provide advice relating to changes in information technology and consumption of information using digital media.

IER Research Pty Ltd was engaged by Tourism Victoria and VTIC to survey Visitor Information Centres to help inform the study.

1.2.1. VIC SURVEY OVERVIEW

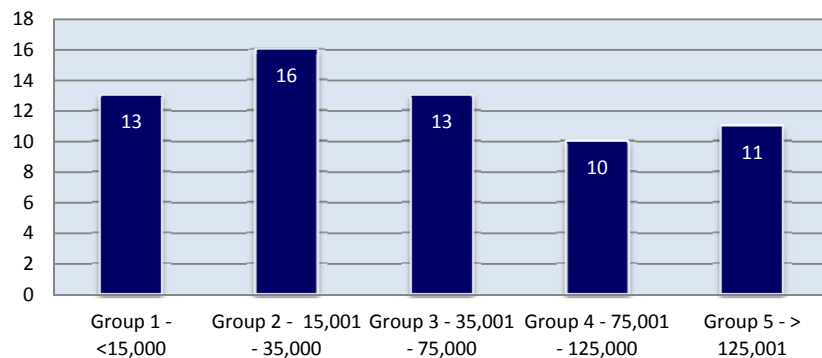
Much of the background information relating to the current situation of VICs in Victoria is based on information gathered from a survey of Victorian VICs conducted in February-March 2013 by IER Research Pty Ltd. The responses to the survey have been classified into groups according to the VIC's number of walk in enquiries, as shown in Figure 1.

A total of 63 out of the 73 accredited VICs in Victoria completed the survey.

For reporting purposes, VICs have been grouped in line with the number of walk in visitors they attracted in 2012.

- Group 1 VICs attract fewer than 15,000 walk in visitors
- Group 2 VICs attract between 15,001-35,000 walk in visitors
- Group 3 VICs attract between 35,001-75,000 walk in visitors
- Group 4 VICs attract between 75,001 - 125,000 walk in visitors
- Group 5 VICs attract more than 125,001 walk in visitors

FIGURE 1 VIC SURVEY SAMPLE SIZE



1.3. GLOSSARY

Gateway Location	Refers a VIC which is located at the entrance to a town or a region
Gateway Centre	Refers to a VIC which is a hub for a particular region.
Satellite VIC	A small VIC which is linked to a gateway centre or central management.
VIC	Visitor Information Centre
RTO/A	Regional Tourism Organisation/ Association
LTO/A	Local Tourism Organisation/ Association
RTB	Regional Tourism Board
VTIC	Victoria Tourism Industry Council
LGA	Local Government Area
ATAP	Australian Tourism Accreditation Program

PART A

ANALYSIS

This section of the report provides an analysis of the VIC network with respect to:

1. Accreditation
2. Operations
3. Design
4. Location
5. Consumer Trends and Digital Media
6. Information
7. Bookings

The section includes analysis of best practice VICs, surveys of the Victorian VIC network and consultation with various stakeholders.

2. VIC NETWORK AND ACCREDITATION

2.1. INTRODUCTION

This section of the report focuses on a review of the 73 accredited Visitor Information Centres in Victoria. It provides an overview of the background to accreditation and distribution of VICs within the network.

2.2. KEY FINDINGS

ACCREDITATION

Consultation with VIC managers highlighted that most centres agree on the importance of accreditation and the consistency of service provision it brings to the network.

VICs would benefit from increased guidance and support from an overarching body to assist in decision making. VICs identified the need for improved leadership in relation to the following:

- Best practice VIC design;
- Technology transitioning;
- Opportunity for collaborative exercises across the network, such as generic smart phone applications;
- Booking systems; and
- Marketing of the 'i'.

VIC NETWORK

There is great variability in the provision of VICs across the Victorian tourism regions. Firstly, regions closer to Melbourne generally had a lower number of VICs, however are geographically smaller.

The regions surrounding Melbourne have a much lower proportion of total walk in visitors captured by VICs than those further from Melbourne. For example, the Yarra Valley and the

Dandenongs VICs captured 0.5% of total visitors and the Mornington Peninsula VICs captured 2.3% of total visitors.

The reason for much lower levels of capture of visitors into VICs in regions in close proximity to Melbourne, despite being geographically smaller, may include:

- They have a high proportion of daytrip visitors;
- They have a higher proportion of holiday home owners;
- Visitors are travelling for a specific attraction, occasion or event.

An analysis of total enquiries as a proportion of total visitors highlights that Mornington Peninsula and Yarra Valley and the Dandenongs attract much greater levels of enquiry via alternative methods including email and phone.

Locations close to Melbourne should consider other forms of visitor information services to offset the lower levels of walk in visitors to VICs. This may include the internet, smart phone services and destination based information.

The data presented in this report highlights that larger regions further from Melbourne, such as the Murray, High Country, the Grampians and the Great Ocean Road have greater capture of walk in visitors as a proportion of total visitors to the region. The regions that are more successful at capturing walk in visitors have the following attributes:

- Locations where visitors travel further distance;
- VICs located in regional centres that are also strong tourist destinations;
- A strong touring focus;
- Higher quality, well-located information centres;
- Attract higher levels of holiday leisure visitors; and
- Are overnight destinations.

2.3. BACKGROUND OF ACCREDITATION

The VIC accreditation program was initiated in 1997, when the Country Victoria Tourism Council (CVTC) in partnership with Tourism Victoria and representatives from the tourism industry, established an accreditation system in Victoria. This system operated for only one year.

In 1999, the Better Business Tourism Accreditation Panel was developed. This panel resulted from a merger of accreditation programs used by the CVTC, the Victorian Tourism Operators Association (VTOA), the Hotel Motel and Accommodation Association (HMAA) and the Victorian Wineries Tourism Council (VWTC). Following this merger, the Better Business Tourism Accreditation Program (BBTAP) was developed, which is now called the Australian Tourism Accreditation Program (ATAP).

During this time, the Australian Tourism Accreditation Authority (ATAA) was formed, which developed a set of national guidelines for tourism accreditation programs across Australia. The BBTAP was developed in line with the ATAA national guidelines and in December 1999, the BBTAP was launched, with VICs being the first sector to be accredited under the new program.

The yellow italicised 'i' with the blue background was trademarked in 1999 by Tourism Victoria and this is sublicensed to each of the states and territories.

All members must fulfil the ATAP core requirements, with VICs having to complete an additional application regarding VIC operations before they are able to display the yellow 'i' sign.

The VIC application has nine sections which relate to the following areas:

- Tenancy;
- Support from Local Government and Tourism Associations;
- Business Name Registration and Insurance;
- Opening Hours and After Hours Information;
- Collection and Collation of Visitor Records;
- Staffing Levels;

- Visitor Enquiries and Bookings;
- Information Display and Policies; and
- Facilities and Amenities.

Although there are many queries on a yearly basis from businesses or organisations wanting to become an accredited VIC, very few go ahead with the application, mainly due to the significant initial establishment and ongoing costs. As such, very few centres are able to operate without the financial backing from Local Government and/or their Regional or Local Tourism Association. It is for this reason that one of the compulsory requirements is to have letters of support from Local Government and the Regional Tourism Association, to ensure the centre is embraced by the community and will have every chance of being sustainable into the future.

At a national level, each state and territory must adhere to minimum standards of operation in order to be able to display the 'i' sign. However, it is up to each state and territory to employ additional criteria once with these minimum standards have been met. The VIC guidelines are generally uniform across the country; however there are subtle differences which suit the needs of different states and territories.

In Queensland for example, VICs are required to be open for a minimum of 36 hours per week and exemptions are made in the instances where a centre is located in a remote location and is subject to extreme weather conditions such as annual flooding. In contrast, opening hours in Victoria are stipulated as 7 days per week, from 9am to 5pm. Opening hour requirements are also different in South Australia, where VICs are only required to open from 10am until 4pm on Saturday and Sunday.

Queensland has made the requirement for one full time equivalent paid staff member managing each centre recommended rather than mandatory, which is the case in Victoria.

2.4. THE ACCREDITATION BRAND



The VIC brand is heavily associated with the yellow “i” logo. It is one of the most recognisable signs for people seeking information and is an important factor when assessing the value of accreditation.

Research conducted by Millward Brown around 13 years ago highlighted people's awareness of the i sign. The relevant findings of this research are highlighted below. Given the age of the research it is recommended that an update to this be conducted to provide a current picture of the i brand awareness.

- 77% of respondents were aware of Visitor Information Signs;
- Most respondents were clearly associating VIC signage with the white on blue symbol (62%), 30% were familiar with the yellow on blue Visitor Information Centre Signs; and
- 12% of respondents had noticed both white ‘i’ and yellow ‘i’ symbols, however 80% did not know a reason for having these two signage systems.

Importantly, under the various State and Territory Tourist Signing Guidelines/policies only accredited visitor centres are provided with road signing on Australia's arterial road network.

2.5. ROLE OF VICS

2.5.1. “OFFICIAL” ROLE OF VICS

The current role of Visitor Information Centres is highlighted in the Victorian VIC Accreditation guidelines. They include:

- A Visitor Information Centre provides a **central location** (in a fixed building/structure) for visitors to gain access to **timely, accurate and impartial visitor information** and advice.
- The prime purpose of a Visitor Information Centre is to **enhance the visitor experience, encourage visitors to stay longer and undertake additional activities, exceed visitors' expectations and encourage visitors to return to the region.**
- A Visitor Information Centre delivers the above by sharing its passion and providing **quality and accurate information, by providing exceptional customer service and effectively promoting the range of visitor experiences and services available.**
- A Visitor Information Centre **also supports local businesses and tourism operators within a region.** Many local business and tourism operators are reliant on the services of the Visitor Information Centre to provide additional business and ensure a high standard of visitor servicing in the area.

2.5.2. OTHER ROLES ADOPTED BY VICS

Through consultation with VICS in Victoria, this study has identified that well-resourced VICS are playing a much broader role in tourism than required by the accreditation standards. Many leading VICS in Victoria provide the following services (in addition to the roles described above):

- Accurate, timely emergency information to visitors and residents when required;
- An avenue to collect information on visitors to a region to test marketing programs;
- Tourism business mentoring and education including workshops on packaging information, digital media, booking services;
- Greater focus on visitor servicing: moving beyond information to improving visitor experience in a region;

- Inform and engage with residents, building an understanding of tourism in the community and strengthening VFR markets;
- Information relating to resident and industry attraction; and
- A hub for the tourism industry.

2.5.3. RESEARCH RELATING TO VIC ROLES AND IMPACTS

This broader role of Visitor Information Centres is explored in a Queensland report “Accredited Visitor Information Centre Case Studies: Insights into their Valuable Contribution to Tourism and Communities”. (Refer to Appendix A). The report highlights the following with respect to successful VICs’ contribution to the tourism industry and community:

- They help to build positive relationships with the tourism industry, RTOs/RTBs and the community;
- They communicate the benefits of tourism to the broader business sector;
- They partner with local businesses and organisations; and
- They perform a role in crisis management.

A report titled “The Impacts of Regional Visitor Information Centres on Visitor Behaviour” (Refer Appendix B) also highlights the importance of VICs in changing visitor behaviour leading to increased yield. The report highlights the following:

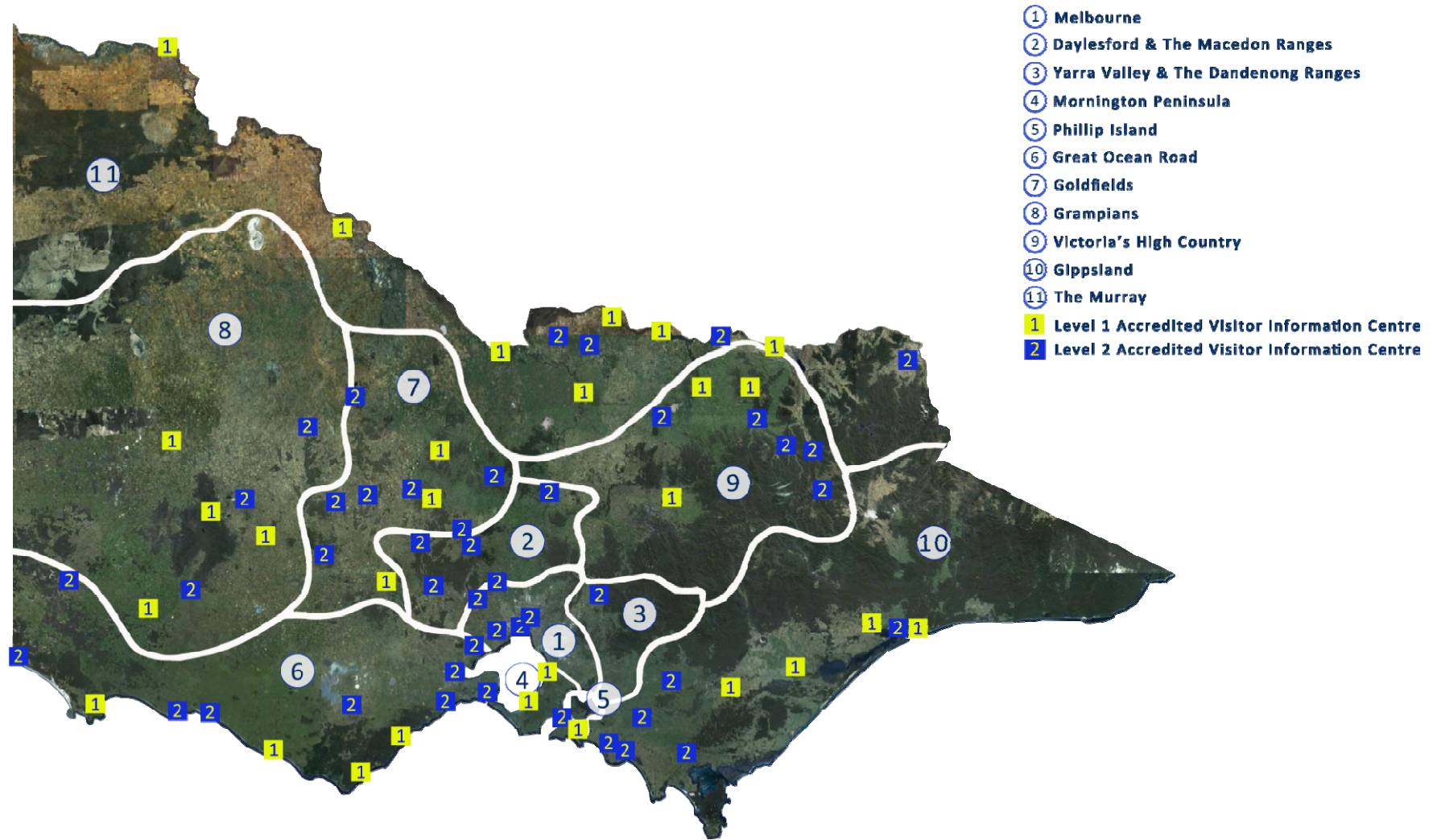
- 83% of VIC patrons participated in additional activities;
- 72% of VIC patrons increased their length of stay;
- 22% spent additional nights in the area and 27% spend additional nights elsewhere; and
- 59% of VIC patrons stated that the additional activities or time resulting from their visit to a VIC had resulted in additional expenditure that they hadn’t planned prior to visiting a VIC.

2.5.4. ROLE OF VICS IN EMERGENCY INFORMATION

Recent studies into visitor perceptions and attitudes to safety and risks in Victoria have found a strong dependence upon accredited VICs to provide safety and emergency information. For instance, a 2009 Tourism Victoria study found that a majority of respondents (81%) would seek emergency information from local VICs while they were least likely to source safety information from emergency services websites.

A recent study into tourism bushfire messaging commissioned by the Department of Justice and Tourism Victoria confirmed this importance with VICs rated as high on the list of expected sources of information about details of bushfire plans, updates on bushfires in the area, locations of Neighbourhood Safer Places and activities for high risk days.

2.6. THE VICTORIAN ACCREDITED VIC NETWORK



2.6.1. NUMBER OF ACCREDITED VISITOR INFORMATION CENTRES

There are 73 accredited VICs throughout Victoria¹.

The Great Ocean Road region has the highest number of accredited VICs at 13, followed by Gippsland (11), The Murray (10), The Grampians (9) and High Country (8). These regions are made up of a range of destinations and Local Government Areas.

The Murray has the greatest number of level 1 VICs, followed by the Great Ocean Road, Grampians and Gippsland all with 4 level 1 VICs. This is most likely influenced by a number of larger regional centres within the Murray Region, Grampians and Gippsland regions. Generally, the larger the region the more VICs that are present, with Daylesford and Macedon Ranges the exception.

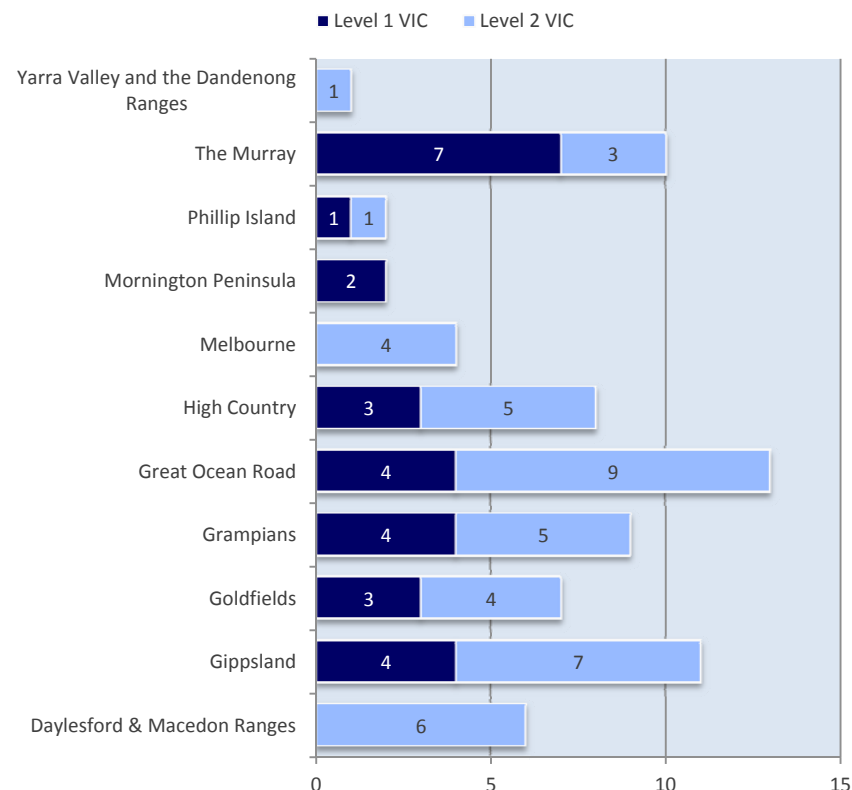
Figure 3 shows the number of visitors to a region per VIC, highlighting that there is a large variation in the number of VICs per visitor in the regions. For instance, the Grampians region has 1 VIC per 173,000 visitors, where Melbourne has 6.4 million visitors per VIC. It is difficult to determine an appropriate benchmark for the provision of VICs however, in the those regions which are at the extreme end of the scale in terms of high provision or low provision, further analysis of the effectiveness of the VIC network may be required.

The Melbourne region may consider expanding its VIC network to more effectively align with gateways such as Melbourne Airport or Southern Cross Station.

Figure 4 shows VIC walk in visitors as a proportion of total visitation to each of Victoria's regions. Those regions close to Melbourne have relatively low capture of visitation; however they also generally have a lower number of Visitor Information Centres, with Daylesford and the Macedon Ranges (with six accredited centres) the exception.

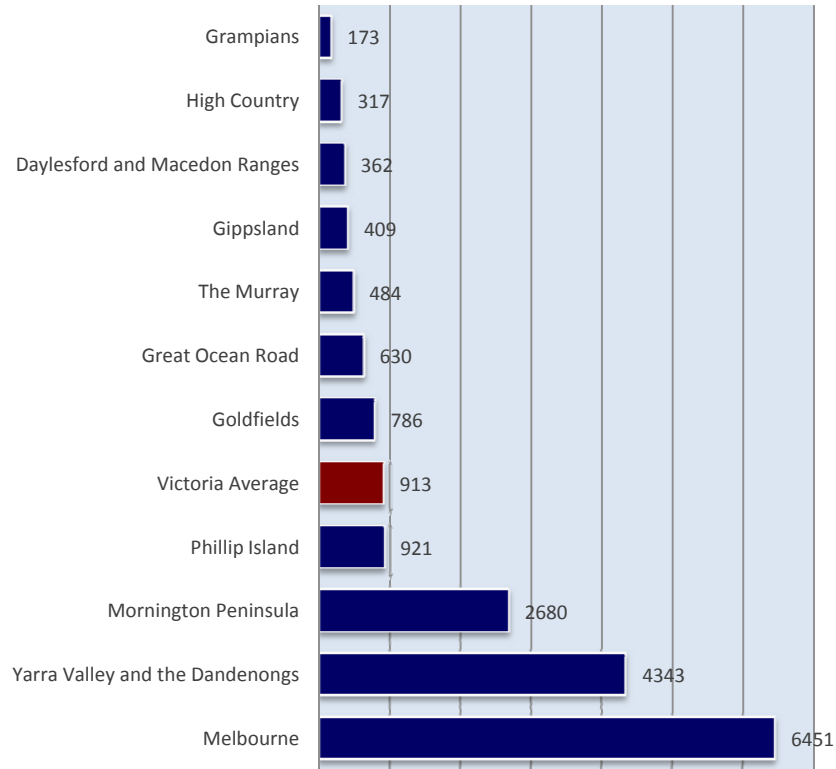
Figure 5 shows the number of enquires as a proportion of total visitors to each of Victoria's regions. By contrast, this shows that a number of the regions closer to Melbourne have a higher capture of visitors when including email and phone enquiries in the data.

FIGURE 2 NUMBER OF VISITOR INFORMATION CENTRES IN VICTORIA



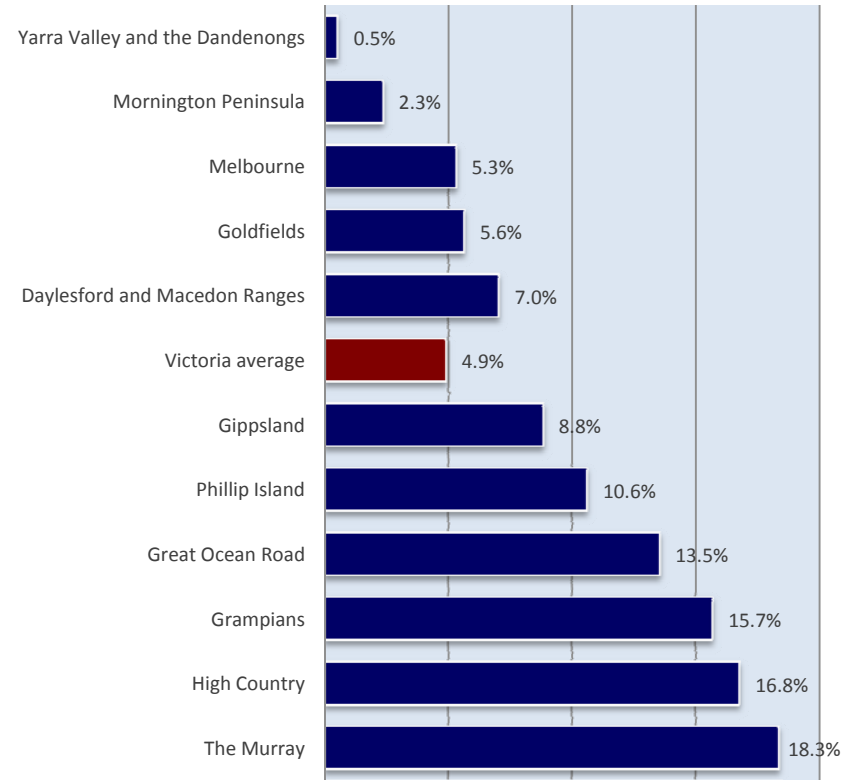
¹ Refer to the Visit Victoria website, in which 92 Visitor Information Centres are identified - 73 accredited, 19 non-accredited.

FIGURE 3 NUMBER OF VISITORS TO THE REGION PER VISITOR INFORMATION CENTRE



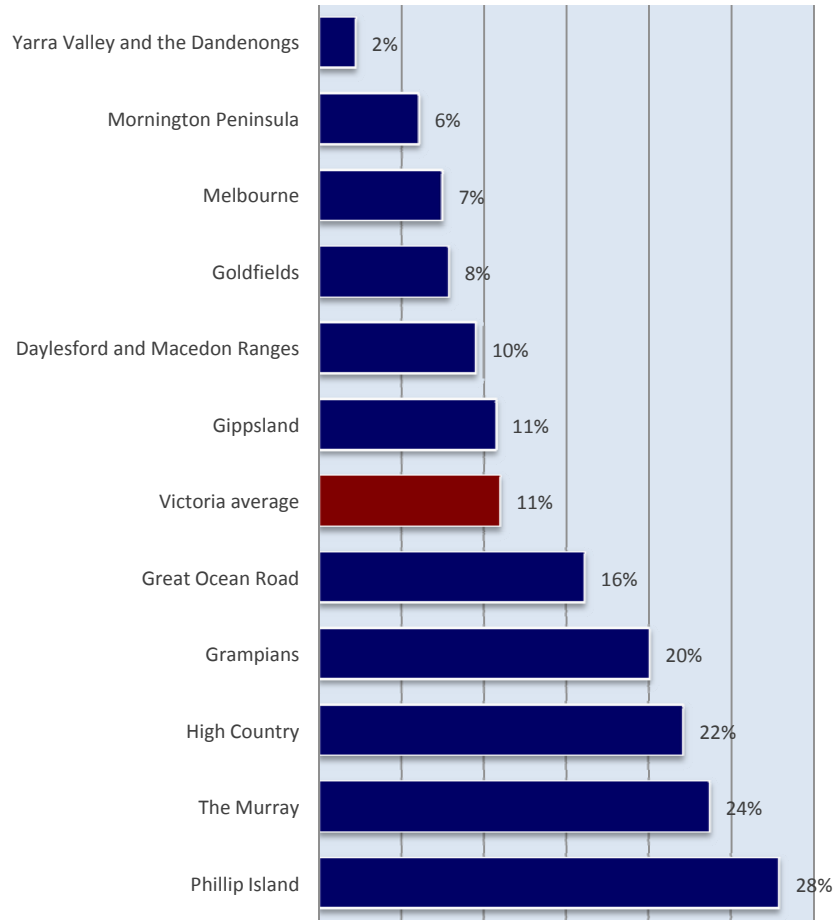
Source: Visit Victoria, National and International Visitor Survey, Urban Enterprise

FIGURE 4 NUMBER OF WALK IN VISITORS AS A PROPORTION OF TOTAL VISITORS TO THE REGION



Source: Visit Victoria, National and International Visitor Survey, Urban Enterprise

FIGURE 5 NUMBER OF ENQUIRES AS A PROPORTION OF TOTAL VISITORS TO THE REGION



Source: Visit Victoria, National and International Visitor Survey, Urban Enterprise

3. VIC USAGE AND CONSUMPTION

3.1. INTRODUCTION

The way visitor information is delivered and consumed has changed markedly over the past 15 years, particularly in response to the increasing use of the internet. This has provided visitors access with an extensive amount of information pre-trip and now with smart phones and tablet devices, also during the trip.

The data analysed in this section identifies changes in use and consumption of VICs and information sources to inform the likely future needs for visitor information.

3.2. KEY FINDINGS

WALK IN VISITORS TO VICs

There are two key datasets available which track trends for visitor information consumption. The first dataset is collected by VTIC whereby VICs in Victoria report regularly on enquiries by phone, walk in visitors and by email. This data shows that walk in visitors to VICs in Victoria have declined over 2009-2011 period by around 2.1% per annum.

The other data source is the National and International Visitor Surveys which tracks visitors' use of Information Centres prior to visit. This dataset highlights a much greater decline of around 20% per annum for domestic visitors' use of information centres prior to visit during the period 2007-2011.

There are significant gaps in tracking VIC use from the demand side. Expanding the questions in the National and International Visitor Surveys to relate to use of information centres whilst visiting would provide valuable data on consumption and trends in use of VICs.

The slight decline in walk in visitors to VICs (from the survey of information centres) is likely to be related to growth in internet use and, more recently, smart phone use, which allows visitors to access information in the region more readily than previously.

There are some VICs that have reported increased walk in visitation, which is attributed to enhancements to the existing information centre, relocation of the centre or growth in tourism in the region.

It is likely that VICs overall will continue to experience a decline in walk in visitors as digital information improves and is used more widely across demographic groups.

There is little data available that tracks visitor experience, satisfaction and economic impact from VICs. A study was undertaken by VTIC (Tourism Alliance) in 2009 across all VICs, which surveyed VIC visitors. A similar study may be considered again on a biennial basis which surveys visitors who visit VICs and access web-based material.

Consumers of visitor information services need to be surveyed on a regular basis to understand VIC performance and ability of VICs to grow visitor yield. This data will be important in assessing the performance of the VIC and also put strategies in place to meet visitor needs. The National and International Visitor Surveys are well placed to provide quality Australia wide research on VIC consumption.

INTERNET USE

Internet use for visitor information in both international and domestic markets has grown significantly in recent years. In the past, the internet was used primarily for pre-trip information, however with the advent of smart phones; the internet is used increasingly in region or at the destination of visit.

3.3. USE OF VISITOR INFORMATION CENTRES: AS REPORTED BY VICS

An annual survey is undertaken of Visitor Information Centres by IER Research to identify the number of walk in visitors, email enquiries and phone enquiries in Victoria. Only a limited amount of this data has been reported due to inconsistencies of reporting. Data reported relates to the years 2008/09-2010/11.

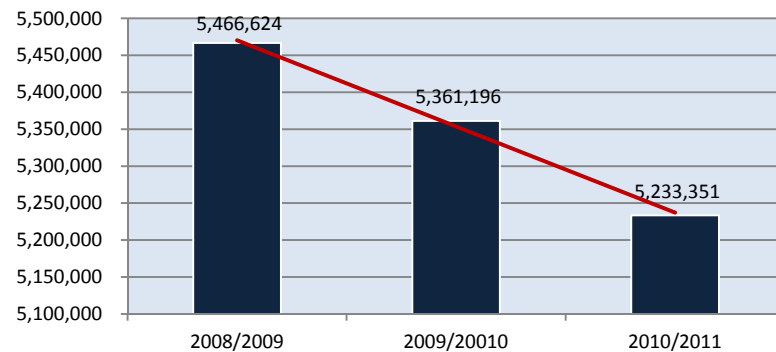
3.3.1. WALK IN VISITORS

Visitor Information Centres in Victoria reported a total of 5,233,351 visitors in 2010/11.

Walk in visitors to VICs across Victoria have declined by around 2.1% per annum overall during 2008/09 to 2010/11. Individual results have not been provided for privacy reasons.

It is difficult to know the exact causes of this decline in walk in visitation to VICs over the three year period, with many factors affecting visitation levels. Two possible factors having impacted these figures include the proliferation in the use of the internet and smart phones during this time, with visitors now having greater self-sufficiency when they travel and therefore less of a reliance on the VIC. Effects on domestic and international travel patterns caused by the high Australian dollar which has led to greater overseas visitation by Australians could have also impacted on the overall decreases in visitation.

FIGURE 6 VIC WALK IN VISITORS – VICTORIA TOTAL



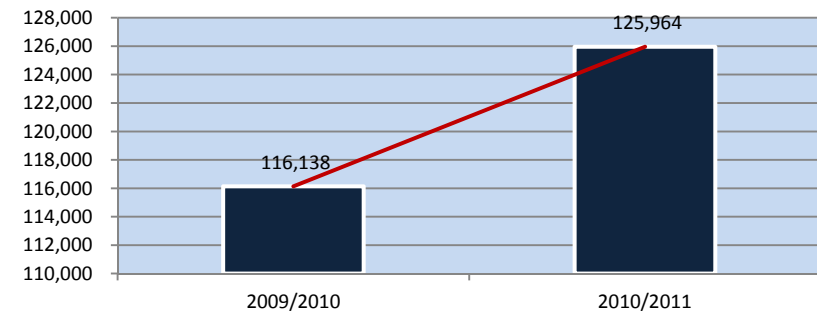
Source: IER Research, as reported by VICS

3.3.2. EMAIL ENQUIRIES

VICs in Victoria reported a total 125,964 email enquiries in 2010/11.

Email enquiries have grown by around 8% between 2009/10 and 2010/11 across Victorian VICs.

FIGURE 7 VIC EMAIL ENQUIRIES

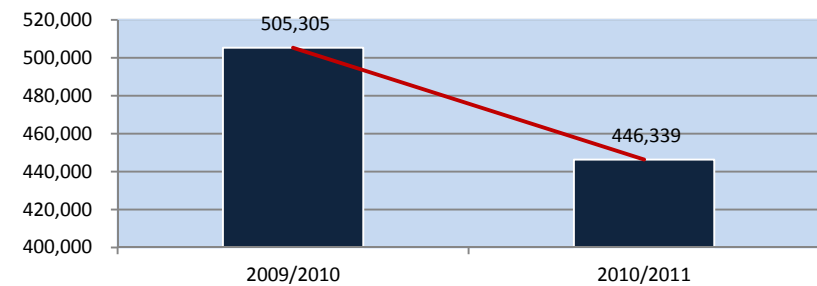


Source: IER Research, as reported by VICS

3.3.3. PHONE ENQUIRIES

Phone enquiries declined by around -12% between 2009/10 and 2010/11.

FIGURE 8 VIC PHONE ENQUIRIES



Source: IER Research, as reported by VICS

3.4. USE OF VISITOR INFORMATION CENTRES: NATIONAL AND INTERNATIONAL VISITOR SURVEYS

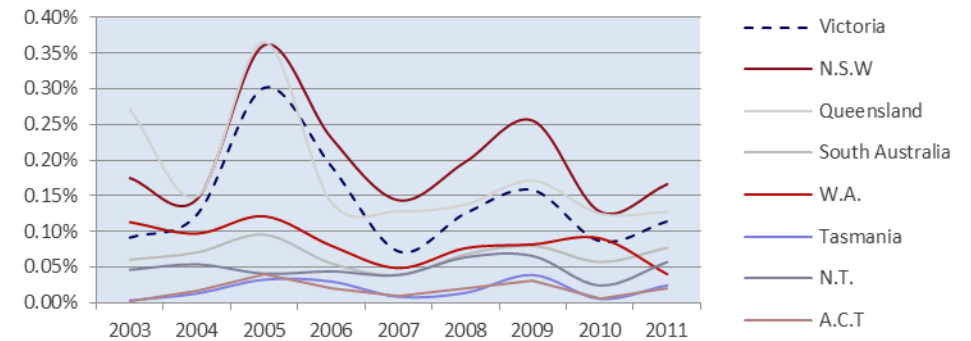
3.4.1. INTERNATIONAL VISITORS

In the International Visitor Survey, Tourism Research Australia only asks one question relating to use of information sources prior to visit.

An average of 0.5% of total international visitors to Victoria used a tourism bureau or a VIC for information prior to their visit between 2003 and 2011. The highest percentage of use was recorded in 2005 at 1.1% and the lowest was reported in 2007 at 0.2%.

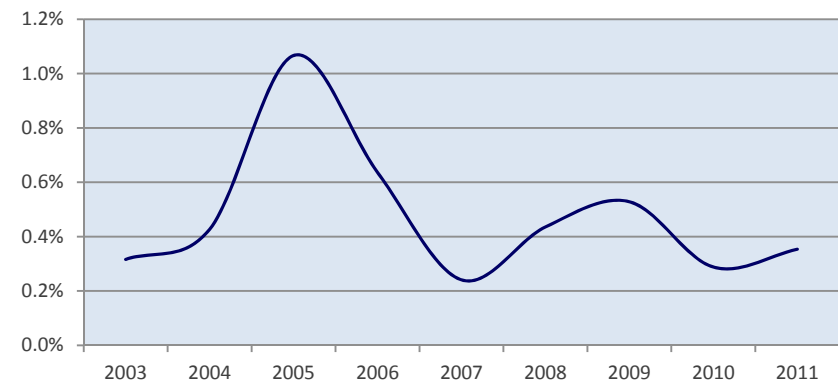
Victoria is ranked the third highest state or territory for percentage of international visitors who used a tourism bureau or VIC prior to their visit to Australia.

FIGURE 9 PERCENTAGE OF INTERNATIONAL VISITORS TO AUSTRALIA WHO USED A TOURISM BUREAU OR VIC – BY STATE 2003–2011 PRIOR TO VISIT



Source: Tourism Research Australia - IVS

FIGURE 10 PERCENTAGE OF INTERNATIONAL VISITORS TO VICTORIA WHO USED A TOURISM BUREAU OR VIC – 2003 TO 2011 PRIOR TO VISIT



Source: Tourism Research Australia - IVS

3.4.2. DOMESTIC VISITORS

In the National Visitor Survey, Tourism Research Australia only asks whether visitors have used an information centre prior to their trip.

The data for the use of a Tourist Office/Visitor Information Centre reveals that the use of these centres prior to visit has been declining substantially since 2007.

2008 saw a very substantial decline in the use of a Tourist Office or VIC prior to visit, with a reported 42% reduction in visitation.

Overall, there has been a 62% decline in uses of a Tourist Office/Visitor Information Centre prior to visit between 2007 to 2010.

As aforementioned, the decreases in VIC usage during this period correlates strongly with the use of the internet as well as with the use of smart phones.

TABLE 1 NUMBER OF DOMESTIC VISITORS WHO USED A TOURIST OFFICE/VIC 2007–2010 PRIOR TO VISIT

Year	Number of Domestic Users
2007	1,437,000
2008	832,000
2009	743,000
2010	545,000

Source: Tourism Research Australia - NVS

TABLE 2 PERCENTAGE CHANGE IN USE OF A TOURIST OFFICE/VIC [DOMESTIC VISITORS] PRIOR TO VISIT

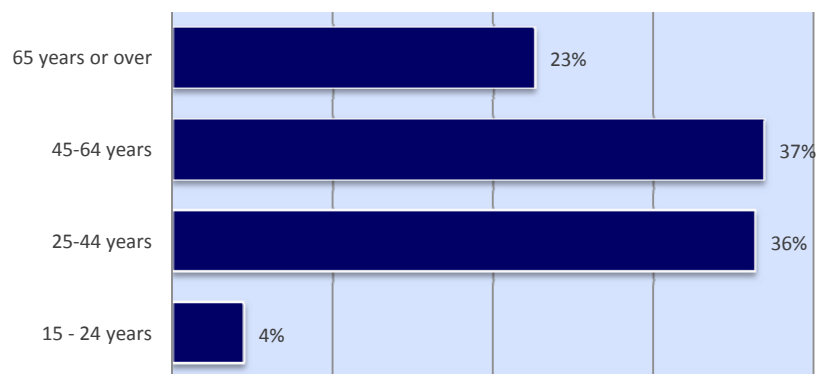
Years	Percentage Change
2007/2008	-42%
2008/2009	-11%
2009/2010	-27%

Source: Tourism Research Australia - NVS

3.4.3. AGE GROUP OF VIC USERS [DOMESTIC VISITORS]

The predominant age group of people who were using VICs in 2010 was 45-64 year olds (37%), 25-44 year olds (36%) and 65 years and over (23%). There is very low use of Visitor Information Centres by people aged 15-24 years.

FIGURE 11 AGE GROUP OF USERS OF A VIC IN 2010



Source: Tourism Research Australia - NVS, 2010

3.5. INFORMATION SOURCES

3.5.1. INTERNET USE [INTERNATIONAL VISITORS]

The International Visitor Survey collects data on consumption of visitor information by international visitors.

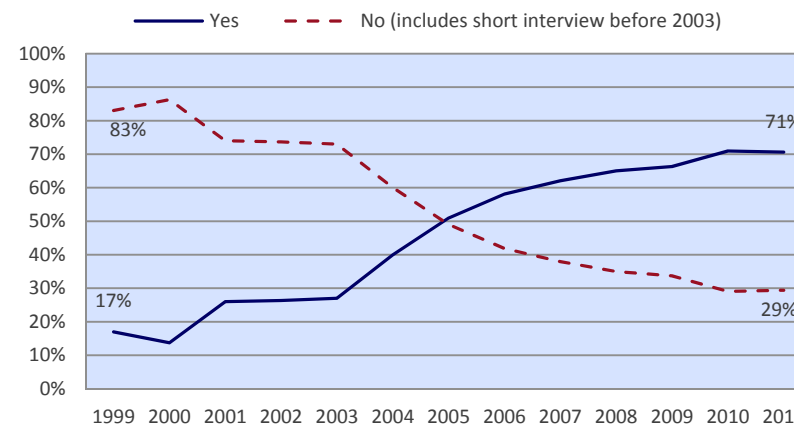
The following graph shows the percentage of international visitors to Australia that used the internet to source information prior to their visit, between 1999 and 2011.

In 1999, only 17% of international visitors surveyed reported having used the internet prior to their visit. By 2011, this percentage had increased to 71% of international visitors.

The reverse situation exists for people who did not use the internet prior to their visit. In 1999, 83% of international visitors did not use the internet prior to their visit. In 2011, only 29% reported not having used the internet.

These results highlight the increasing influence the internet has on visitors' travel plans and the increasing reliance on the internet as a source of information on travel.

FIGURE 12 USE OF INTERNET PRIOR TO VISIT 1999-2011 [INTERNATIONAL VISITORS]



Source: Tourism Research Australia, IVS

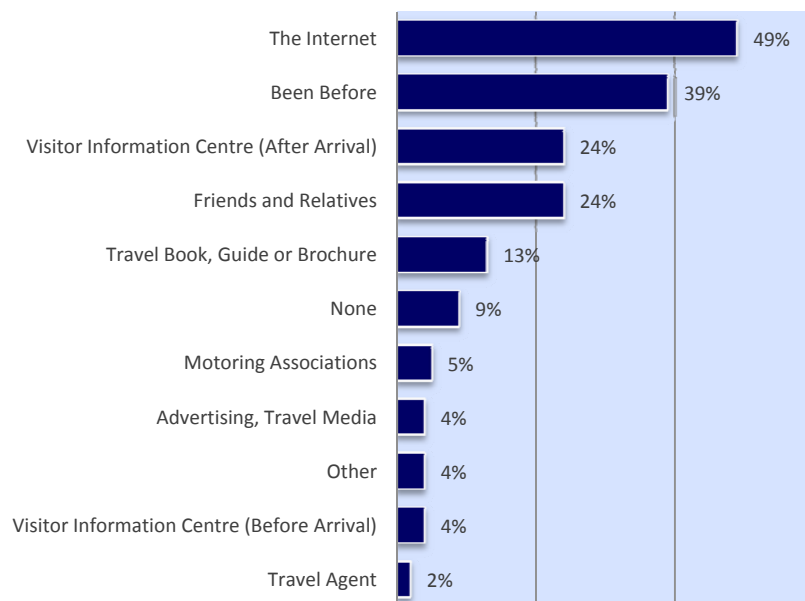
3.5.2. INFORMATION SOURCES [DOMESTIC VISITORS]

Tourism Research Australia prepared Visitor Profiles and Satisfaction Surveys for the following regions: Daylesford & Macedon Ranges (2010), Grampians (2009), Marysville & Eildon (2012), Phillip Island (2012), Swan Hill (2008), Yarra Valley (2011), Ballarat (2011), Bendigo (2011), Goldfields (2011) and High Country (2010). These datasets provide the results for sources of visitor information used, as shown in Figure 13.

The key information sources were the Internet (49%) and Been there Before (39%).

Local VICs (after arrival) were used by 24% of respondents as an information source. An average of 4% of respondents used a local VIC as an information source prior to arrival.

FIGURE 13 INFORMATION SOURCES USED BY DOMESTIC VISITORS



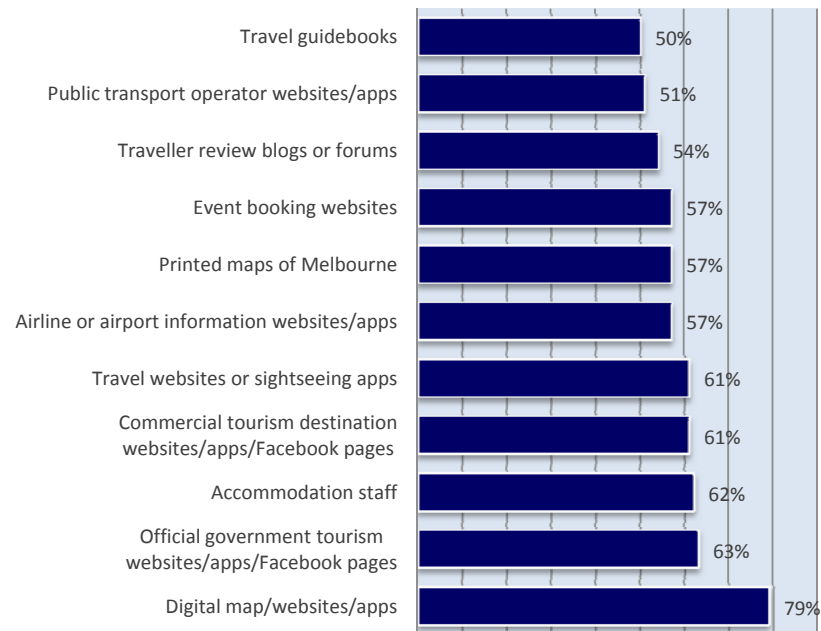
Source: Tourism Research Australia, Visitor Profiles and Satisfaction Surveys, 2008/09/10/11/12

3.5.3. CITY OF MELBOURNE VISITORS: INFORMATION SOURCE PRIOR TO TRIP

The City of Melbourne recently commissioned Nitty Gritty Research to undertake a study into visitor information use and consumption by visitors to Melbourne. The figure below highlights top information sources used prior to the trip.

Digital maps/websites/apps were used most (79%). Contacting the VIC for information prior to arrival did not rank in the top 11 information sources prior to trip.

FIGURE 14 TOP INFORMATION SOURCES USED BY VISITORS TO CITY OF MELBOURNE PRIOR TO VISIT

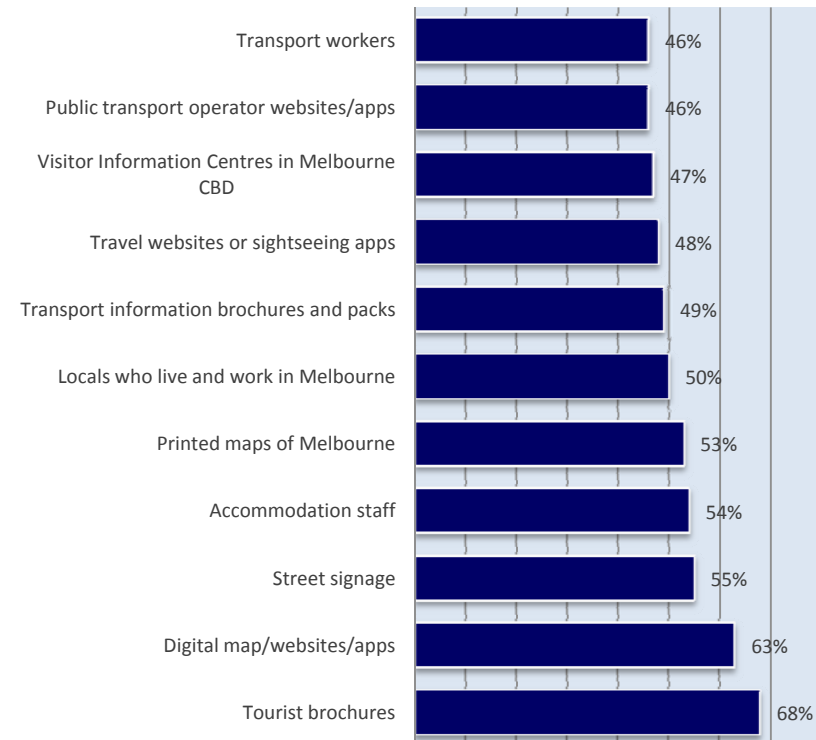


Source: City of Melbourne, Nitty Gritty Research

3.5.4. CITY OF MELBOURNE VISITORS: INFORMATION SOURCE USED DURING TRIP

The City of Melbourne research below shows information sources used during trip. Information Centres were used by 47% of respondents. The data suggests that broader strategies around information distribution need to be developed in region, particularly information at accommodation establishments.

FIGURE 15 TOP INFORMATION SOURCES USED BY VISITORS TO CITY OF MELBOURNE DURING VISIT



Source: City of Melbourne, Nitty Gritty Research

4. VIC OPERATIONS

4.1. INTRODUCTION

The following section analyses VIC operations. The analysis draws on data gathered from a survey of VICs in Victoria undertaken by IER research for VTIC, case studies of VICs and consultation. Specifically, the following aspects of VIC operations have been analysed:

- Owners and operators;
- Staff and volunteers;
- Training;
- Funding;
- Expenditure; and
- Online presence.

4.2. KEY FINDINGS

MANAGEMENT STRUCTURE

There are many different approaches to management structure, with VICs being operated by Local Government, Regional Tourism Organisations and Local Tourism Organisations.

The best approach to VIC management structure is dependent on local factors, however many VICs have been identified that lack strong links with industry and with their Regional Tourism Organisations.

In order to provide accurate, relevant information and messages consistent with regional marketing, it is important that VICs do not operate in a silo and are actively engaged with Regional Tourism Organisations, Regional Tourism Boards and the local tourism industry.

RESOURCES FOR VISITOR INFORMATION CENTRES

In Victoria, the majority of VICs are funded by Local Government, which allows VICs to focus on providing independent advice to the visitor. VICs also make an important contribution to creating additional economic benefit to a region, by creating increased yield and visitor dispersal.

Because of this, it should not be expected that VICs be financially self-sufficient. The measures for the effectiveness of VICs should be indicators such as economic impact, visitor experience and satisfaction and industry growth and performance.

There are substantial resources required to fund VICs, with the average VIC in Victoria requiring \$206,393 of external funding per annum from a mix of Local Government, Regional/Local Tourism Organisations and other sponsors. In order to justify these resources in the face of declining walk-in visitation, VICs should consider providing the following services:

- Links to and implementation of regional marketing;
- Industry development and training; and
- Consumer research.

4.3. EXISTING CONDITIONS

For reporting purposes, VICs have been grouped in terms of the number of walk in visitors which they attracted in 2012.

- Group 1 VICs attract fewer than 15,000 walk in visitors [micro];
- Group 2 VICs attract between 15,001-35,000 walk in visitors [small];
- Group 3 VICs attract between 35,001-75,000 walk in visitors [medium];
- Group 4 VICs attract between 75,001 - 125,000 walk in visitors [large]; and
- Group 5 VICs attract more than 125,001 walk in visitors [very large].

4.3.1. VIC OWNERSHIP

Overall, 85% of VICs that responded to the survey reported that their VIC was owned by Local Government.

Regional Tourism Associations own 5% of those VICs and very few VICs are owned by the private sector or LTAs.

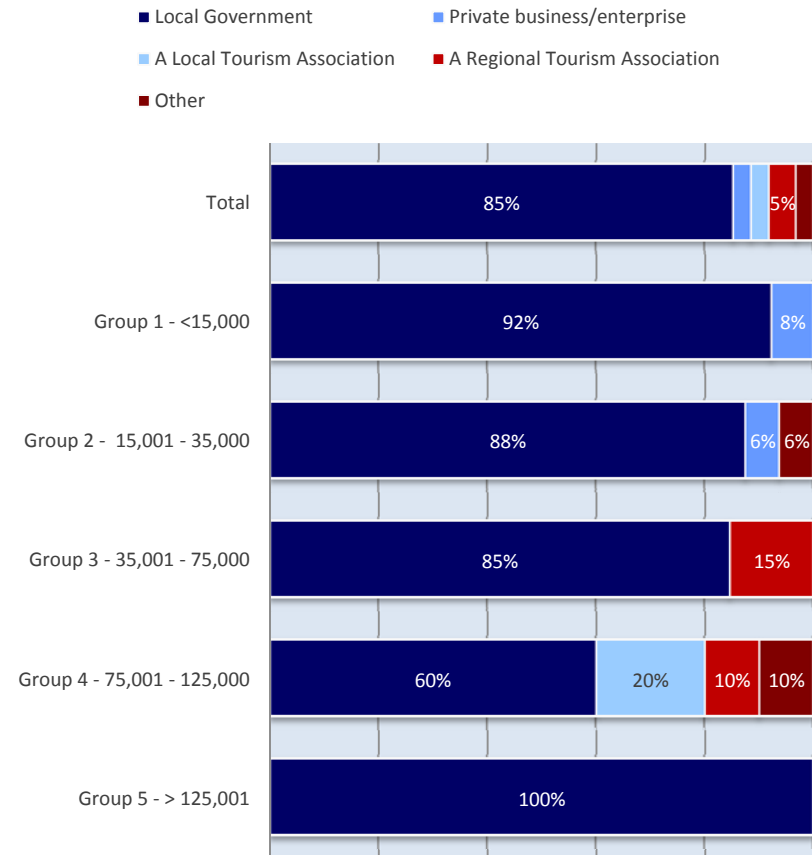
4.3.2. VIC OPERATORS

As with ownership of VICs, the operation of VICs is predominantly undertaken by Local Government (83%).

All VICs in Group 5 are operated by Local Government, followed by 92% in Group 1 and 88% in Group 2.

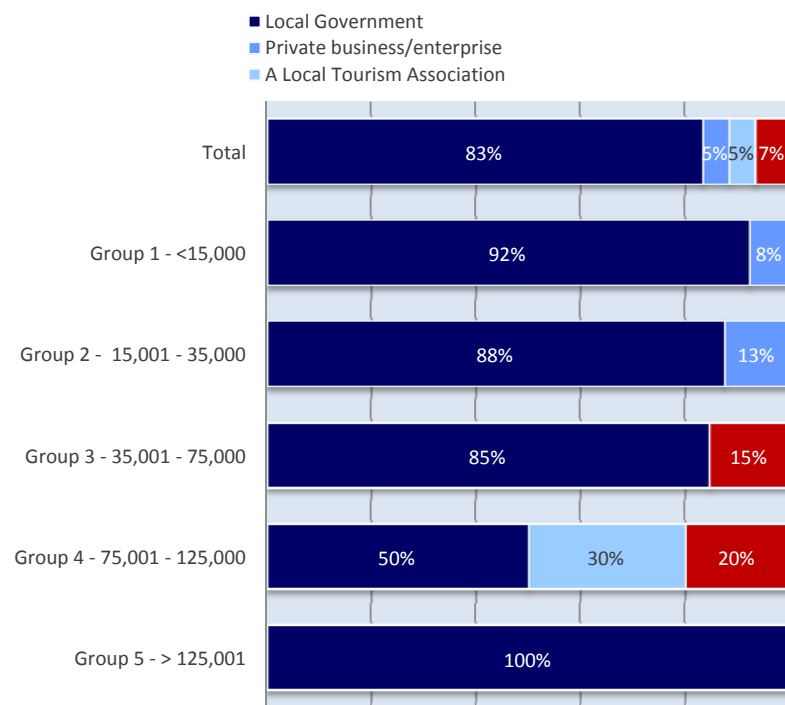
Only 50% of VICs in Group 4 reported that they were operated by Local Government, 30% are operated by a Local Tourism Association and 20% by a Regional Tourism Association.

FIGURE 16 VIC OWNERS



Source: IER Research, as reported by VICs

FIGURE 17 VIC OPERATORS



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

4.3.3. STAFF AND VOLUNTEERS

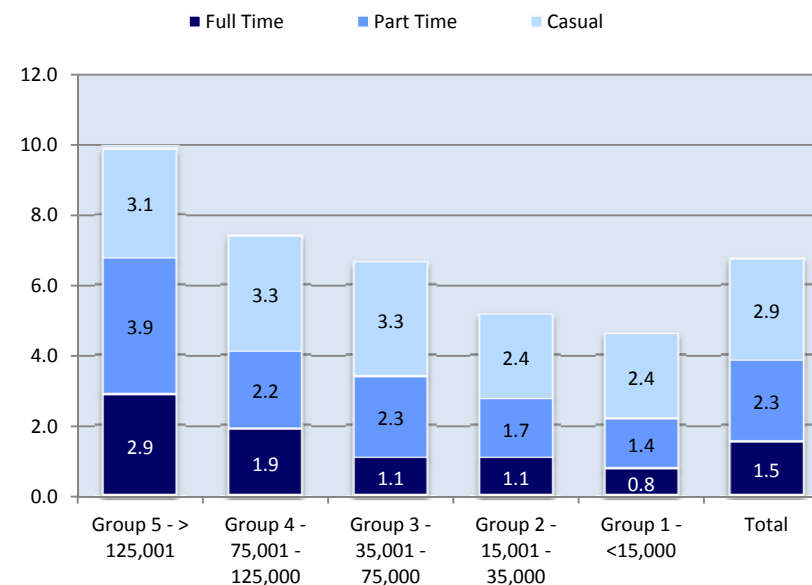
VICs reported that on average 1.5 full time staff, 2.4 part time staff and 2.9 casual staff were employed by VICs. Staff numbers at VICs correlate to the number of enquiries, as shown in Figure 18.

There are clearly economies of scale relating to the service provision, as larger VICs are able to operate with fewer staff per visitor. This is likely to reflect the minimum staff requirements for accredited VICs, which means that the staff costs for smaller VICs per visitor are significantly higher than large VICs.

There was an average of 24.9 volunteers per VIC across the survey sample. The number of volunteers for each VIC did not change substantially across each VIC size group.

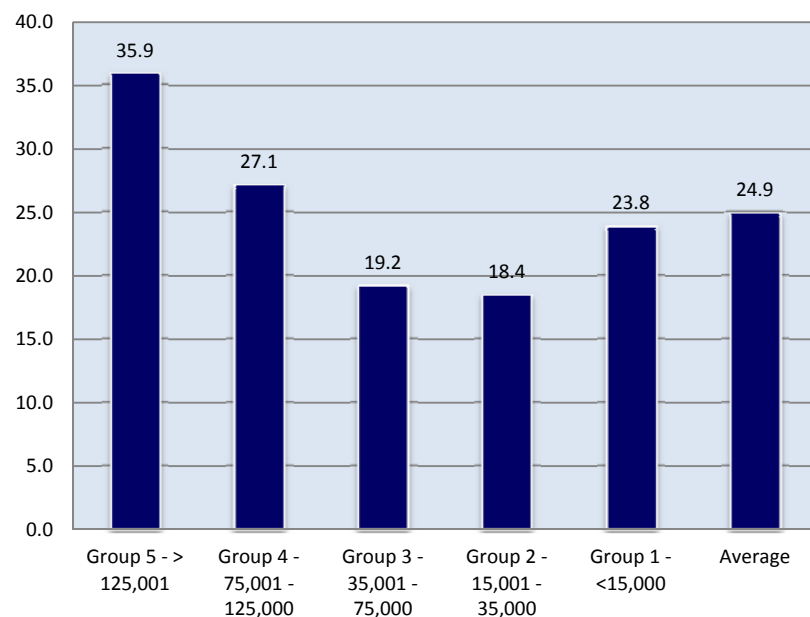
There were very few VICs that operate without volunteer assistance.

FIGURE 18 AVERAGE NUMBER OF STAFF PER VIC



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

FIGURE 19 AVERAGE NUMBER OF VOLUNTEERS PER VIC



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

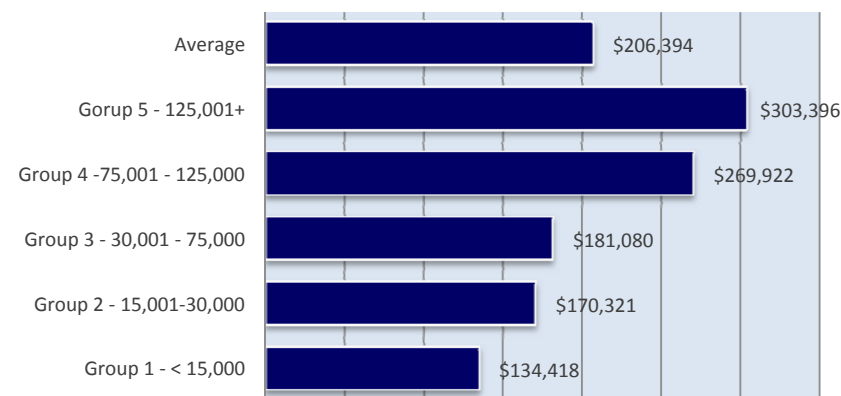
4.3.4. FUNDING

From the survey responses, the amount of external funding required to operate VICs was \$206,393 per annum per VIC. This excludes revenue generated through merchandise sales, commissions and memberships.

The amount of funding is related to the size of the VIC. Group 1 VICs require on average \$134,418 of funding from Local Government, Local /Regional Tourism Organisations and sponsors whilst group 5 VICs require on average \$303,396 of funding per VIC.

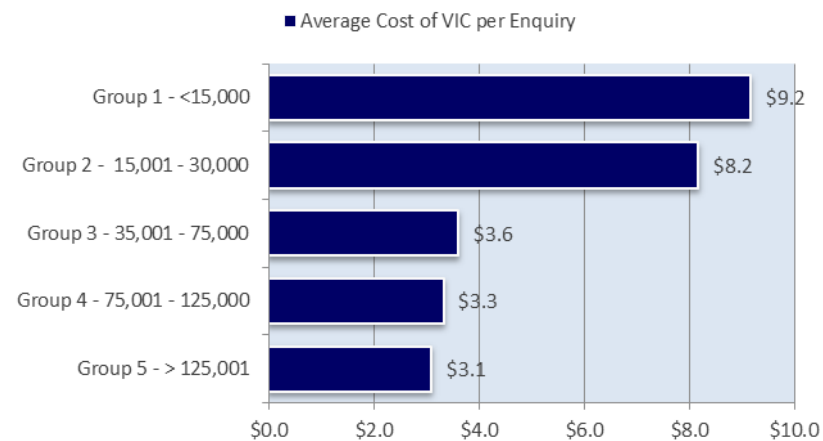
Figure 21 shows the cost per walk in visitor to Visitor Information Centres by VIC size. The data highlights that economies of scale in terms of operating a VIC are achieved for centres which have more than 35,000 walk in enquiries.

FIGURE 20 EXTERNAL FUNDING REQUIRED TO OPERATE VICs



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

FIGURE 21 COST PER WALK IN VISITOR

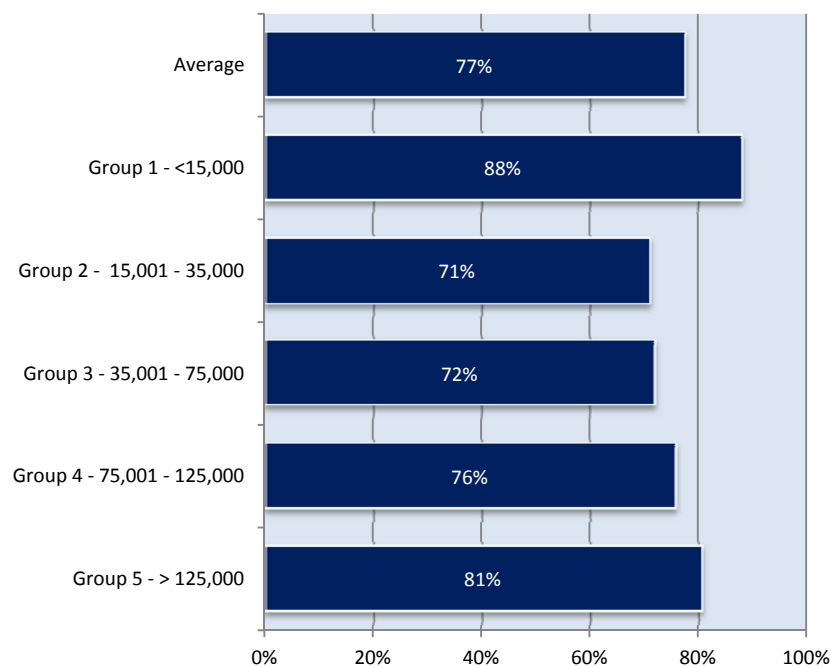


Source: IER Research, calculated by Urban Enterprise, as reported by VICs

4.3.5. FUNDING SOURCES

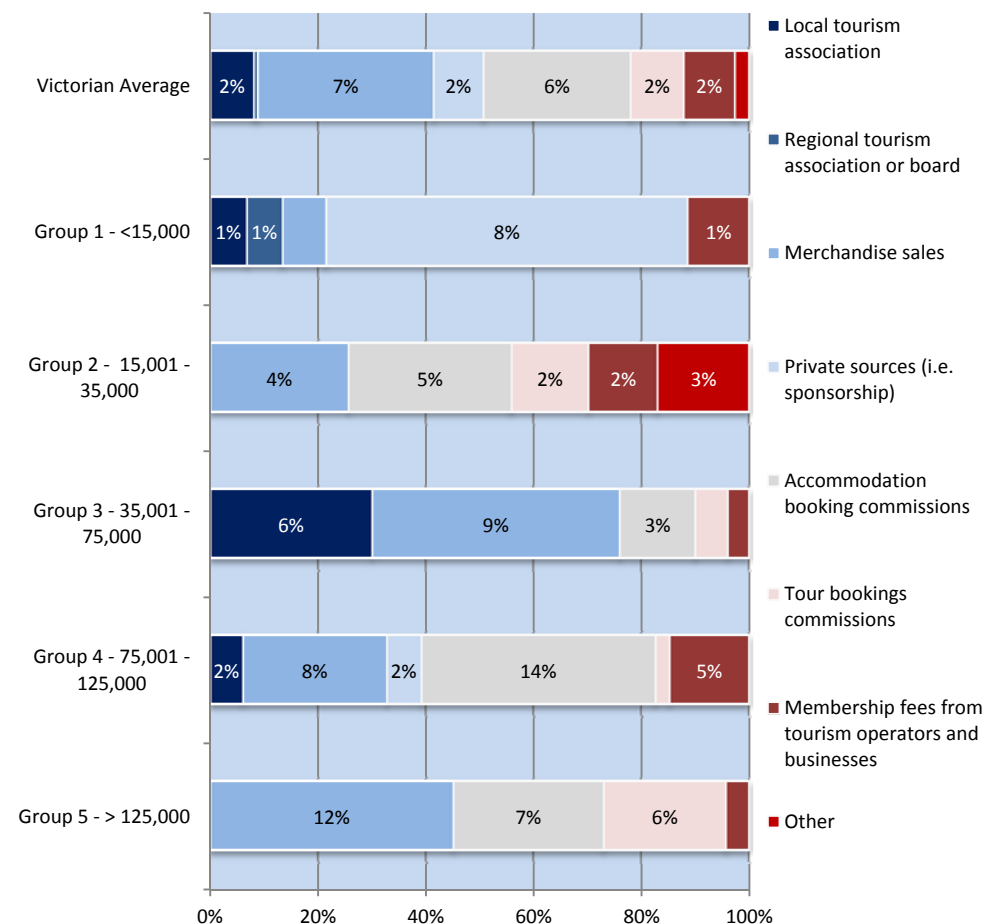
Local Government provides the majority of funding for VICs, providing an average of 77% of funding. The smaller VICs in Group 1 reported the highest percentage of funding as sourced from Local Government, at 88%. Other minor funding sources included sales from merchandise (7%) and accommodation and booking commissions (6%).

FIGURE 22 % OF LOCAL GOVERNMENT FUNDING



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

FIGURE 23 OTHER FUNDING SOURCES



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

4.3.6. EXPENDITURE

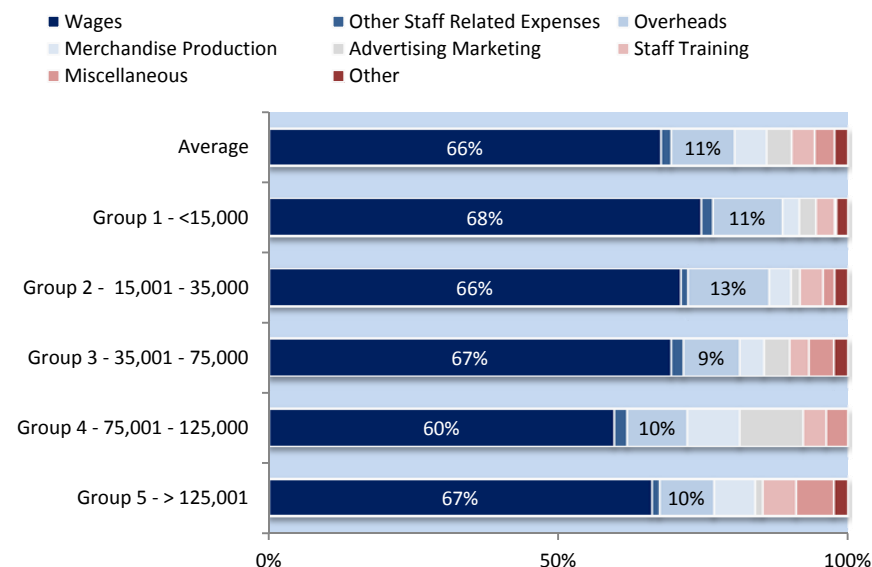
VICs reported on their operational costs. Overwhelmingly, the majority of VICs reported wages as the greatest item of expenditure, representing 66% of expenditure. Based on the averages for staff, funding and percentage of expenditure allocation, average monetary values for items of expenditure have been calculated, as shown in Table 3. These estimates are general and will obviously vary between VICs.

'Other' items of expenditure noted by respondents include other volunteer support related costs, equipment and other overheads.

Wages account for an estimated \$162,700 of the average VIC expenditure budget. The next largest item was overheads, which accounts for an estimated \$26,000 of the average expenditure budget. Overheads include rent, electricity, water, council rates, building maintenance etc.

There is very little expenditure on digital media by VICs, which is now the most used source of information by visitors. Anecdotally, costs for digital media information are often attributed to Regional Tourism Organisations or Local Government and not VICs.

FIGURE 24 EXPENDITURE BUDGET



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

TABLE 3 ESTIMATES OF EXPENDITURE

Expenditure Category	Percentage of Expenditure	Estimated Expenditure
Wages	66%	\$162,701
Other Staff Related Expenses	2%	\$4,179
Overheads	11%	\$26,417
Merchandise Production	5%	\$13,207
Advertising Marketing	4%	\$10,239
Staff Training	4%	\$9,700
Miscellaneous	3%	\$8,298
Other	5%	\$12,683
Total	100%	\$247,424.00

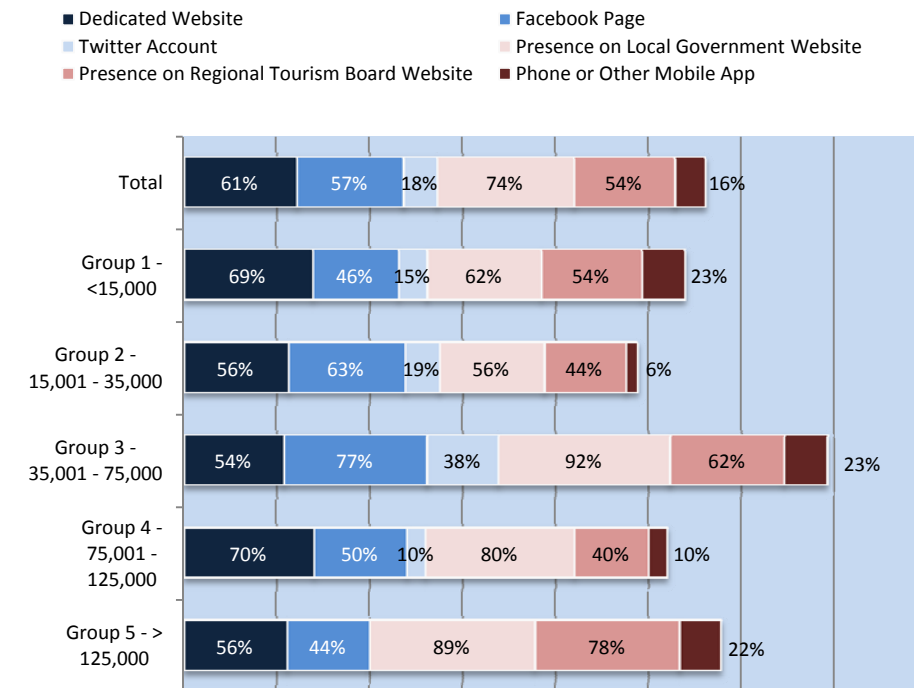
Source: IER Research, calculated by Urban Enterprise, as reported by VICs

4.3.7. ONLINE PRESENCE

61% of respondents reported they had a dedicated website for their VIC, 74% said their VIC had a presence on their Local Government website, 54% reported a presence on the Regional Tourism Board website, 57% reported they have a Facebook page, 18% have a twitter account and 16% have a phone or other mobile app.

The highest reported online presence was on the Local Government website (74%). It should be a goal to increase VICs' presence on Local Government and regional tourism websites to 100% of VICs.

FIGURE 25 ONLINE PRESENCE



Source: IER Research, as reported by VICs

4.4. CONSULTATION OUTCOMES

REGIONAL CONNECTIVITY

Throughout consultation it was acknowledged that the longer a region had been established, the more likely it was that there were strong communication channels and greater connectivity. One such example is that of the Great Ocean Road VICs, which operate effectively as a network of centres, with regular and consistent flow of communication between one another. They meet every three months to exchange information and share ideas and include the Southern Grampians and Ballarat as they comprise the Great Southern Touring Route. The Geelong Otway Tourism database is maintained at Geelong for seven centres and brochures are also distributed via the centre.

It was highlighted that in some regions there could be greater connectivity between the regional marketing efforts and VICs and that there was a missed opportunity to take advantage of the VIC's direct link to visitors, such as providing intelligence back to the RTB as to the success of marketing campaigns and what visitors want. There was also a concern that it was a missed opportunity that some RTBs did not have VIC representatives and information was not sought from them on a regular basis.

FINANCIAL SUSTAINABILITY

There was a general consensus that VICs are not money making entities, but exist primarily as an economic driver, key to dispersing visitor expenditure and increasing visitor yield. A VIC's ability to generate revenue in order to offset its running costs depends on a multitude of factors such as location, income streams, the amount of product, the management model as well the dependency on Local Government funding.

Despite the large financial turnover of some VICs, there are still very few centres creating revenue and some that have practically no revenue streams. The Lorne VIC, for example, originally investigated the option of operating a booking system, but did not see a model that worked and generated sufficient revenue.

4.5. CASE STUDIES: VIC OPERATIONS

The following case studies provide an overview of best practice VICs in terms of operations and management.

ONLINE PRESENCE: NEW ZEALAND – I-SITES



New Zealand has more than 80 Visitor Information Centres, or 'i-sites' across the country. The New Zealand i-site network is called i-SITE New Zealand and is resourced by Tourism NZ.

The centres are heavily promoted through digital means via Tourism New Zealand. Individual i-sites also have their own strategies, including dedicated websites and social media. Tourism NZ's strategy is to promote the centres through regional tourism organisations and national tourism organisation channels where there are more 'eyeballs'. Tourism NZ recently decided to close down its i-SITE NZ website which had minimal traffic and replaced it with a hub on Tourism NZ's newzealand.com website. This has resulted in traffic to the website almost doubling over 12 months. They are continuing to investigate ways to improve pathways within this website.

Tourism NZ is encouraging i-Sites to work more closely with their RTOs to ensure their digital channels complement and do not contradict each other. i-SITE NZ will be working with Tourism NZ on the development of a national smartphone app, rather than looking at

developing its own and will work with third party application developers to ensure content is synchronised across all platforms.

The ability for visitors to be guided to their i-SITEs through the newzealand.com website is facilitated via a national i-SITE map which highlights the location, address and contact information for all centres across New Zealand. Visitors can print this from the website and also have the ability to get it sent directly to their smartphone by scanning a Quick Response code (QR code) located on the map.

Although Tourism NZ recognises that there will always be a need for visitors to meet face to face with a local, they do realise that the network must face the challenges of greater scrutiny from Local Government and advances in technology. In 2012, a national i-SITE strategy² was developed in order to grow the network's profile and increase the productivity of the network, encourage innovation and develop operational efficiencies. One component of this strategy is to focus on digital promotion and information provision, which they aim to achieve through the development of mobile device applications, mobile geo-location technology as well as free Wi-Fi throughout the network.

Developing a collaborative and streamlined approach to the digital promotion and enhancement of VICs is important in order to harness the power of the network and be differentiated amongst the myriad of online visitor information. New Zealand presents a case study for a top down approach to VIC management for consistency of provision.

² Refer to appendices in this report.

VIC STRUCTURES: MANSFIELD VISITOR INFORMATION CENTRE



Mansfield Visitor Information Centre is operated by the Mansfield Mt Buller Tourism Association. The organisation is a Regional Tourism Association with a board structure comprising members of the Mt Buller Resort Management Board, Mansfield Shire Council and industry.

The Mansfield Mt Buller Tourism Association also operates the Mt Buller VIC during peak periods and is responsible for the Mansfield Mt Buller High Country Reservations accommodation booking service.

The Mansfield Mt Buller Tourism Association is predominantly funded by Mansfield Shire and the Mt Buller Resort Management Board, with additional funding streams including commissions from the accommodation booking service.

The Mansfield VIC only uses paid staff; there are 2 full time, 4 part time and 6 casual staff during winter.

Having one organisation responsible for the distribution of visitor information services in the Mt Buller-Mansfield region ensures that there is consistent messaging for visitors. Importantly, the coordinated booking service provides visitors with more choice in terms of their accommodation options (on mountain or off mountain). The coordinated approach to bookings allows for flow on business to accommodation providers in the Mansfield Valley when Mt Buller accommodation is fully occupied on weekends.

In the case of Mansfield, the delivery of a good quality accommodation booking service is a core function of the VIC and commissions from bookings offset some of the cost of paid staff. VICs in emerging tourism nodes or with a much lower product and accommodation

base are unlikely to financially support a VIC with paid staff only, without excessive cost to Council.

VICs which operate under a larger regional tourism organisation structure allows for consistent messaging across the region and provides greater economies of scale in distribution of Visitor information Services. During peak times, a coordinated VIC network allows accommodation to be booked across a wider area, creating increases in visitation to a region.

COMMUNITY LINKS AND STAFF DEVELOPMENT: FRANKSTON VISITOR INFORMATION CENTRE



The Frankston VIC was opened on 30th March, 2007 and is part of the \$25 million Frankston Waterfront entertainment precinct. The centre was the winner of the 2012 Australian Tourism Award in the category of Visitor Information and Services.

The Centre prides itself on being strongly engaged within the Frankston and wider Mornington Peninsula community as well as its staff development and continuous improvement initiatives, which were two of the strongest measures of the Centre's success at the 2012 Australian Tourism Awards.

In its first year of operation, the Centre had approximately 43,000 visitors pass through its doors, which has since grown to an expected 90,000 visitors in the 2012/13 financial year. The focus for the centre is attracting the Visiting Friends and Relatives market. Approximately 65% of visitors are from the Frankston and Mornington Peninsula area, whose main aim is to discover what there is to see and do in the area with friends and relatives.

The VIC encourages community and tour groups to use the centre as an initial meeting location, which can also include a tour of the centre by management. They see this as essential to developing community ambassadors for the centre and spreading a positive message about the services they offer. New council staff are provided with orientation within the centre and receive a discount on retail at the centre, which acts as an incentive to visit again.

One of the other key projects they are involved with is the Mornington Peninsula Traineeship program, which is open to students in senior secondary school working

towards their Certificate III in Tourism. They take on one student for a period of six months. This is one example of important links with the Frankston City Council's Learning City and Community Engagement policies, which are integrated into many of their projects. The VIC is heavily involved with events at the waterfront, with the Sand Sculpting Australia event, the Ironman Asia-Pacific Championships and St Kilda Football Club Family Day.

The Centre takes accommodation bookings, however these are minimal and is a service to the visitor more than a revenue generating initiative. The Centre is involved with assisting conference coordination for Frankston, another service which does not generate income; however, it is important in terms of developing positive links with conference delegates and facilitating their stay in Frankston. The VIC recognises that it will never be independent from Council, however they strongly justify their existence through the strong community engagement and that economic value will flow back into the area.

The Centre undertakes continuous improvement and surveys visitors daily, as well as their volunteers and local businesses as to how they can improve on performance. They have an operations manual which clearly sets out processes within the organisation. Input from staff and volunteers is seen as very important and they are regularly asked for ideas and feedback on ways in which the centre can refresh and renew the space and the way they operate.

Frankston VIC's retail strategy is a large part of its operations, focusing on presenting as much locally and Australian made merchandise and produce as possible. Approximately 60% of Frankston VIC's retail range is local or Australian. Some of the popular items include the locally produced 'I love Frankston' range and Frankston branded souvenirs, as well as hand crafted items. The revenue generated from retail sales subsidises the Centre's costs by approximately one third.

The Frankston VIC is assisting in promoting the region not only to those outside the municipality but also to the local community, which has helped generate greater community pride. The Frankston VIC highlights the importance of VICs engaging with their community and strengthening the VFR market.

5. VIC DESIGN

5.1. INTRODUCTION

VICs across Victoria and Australia have taken many forms, including both purpose built and retrofitted existing buildings.

When new VICs have been developed, they have been done so with very little guidance as to best practice. Many VICs have been designed with aesthetics in the front of mind, however have lacked the guidance on how to best engage with the visitor or provide a sustainable, practical and functional centre.

5.2. KEY FINDINGS

DESIGN

Many custom designed VICs in Australia have focused on the aesthetic exterior of the information centre to create an 'iconic' architectural masterpiece. A rethink of VIC design is required, and a stronger focus on the interior layout and design of VICs is desirable. Considerable cost goes into bespoke designed information centres, however the New York example highlights that with a simple retail shopfront the visitor can access a highly effective information centre.

When designing new information centres, the focus of the design needs to be much more about the internal visitor experience. Excessive expenditure on the external design of buildings is wasted if the internal design and fit out of a VIC is cluttered, confusing or inadequate in size.

TECHNOLOGY

Gateway centres that represent a large destination or region should consider the use of interactive screens and information technology to reduce clutter (such as printed material)

which can overwhelm the visitor. The use of technology would enable visitors to personalise their experience through the development of tailored itineraries.

Smaller centres, which have greater limitations on budget, should not feel pressured to implement expensive information technology. The responses from the survey have highlighted that all VICs are concerned with keeping up to date with the emergence of information technology. With the advent of smart phones and tablets, most visitors now have access to the internet and online information. Engagement with staff and volunteers is the primary reason for visitors going to VICs.

Smaller VICs may consider Wi-Fi and tablets to assist visitors in accessing online information. Larger centres may consider introducing touch screens to simplify and streamline information provision.

PARKING

The number of parking spaces at Visitor Information Centres is not correlated with the size of the VIC. In fact, the average number of parking spaces for VICs which attract between 75,000 and 130,000 walk in visitors is lower than it is for small VICs.

VICs in larger centres are not disadvantaged by having an extensive number of spaces.

DIVERGENCE IN APPROACHES TO VISITOR INFORMATION SERVICING

There is a divergence in the approach to Visitor Information Centres in Victoria. Geelong Otway Tourism has shifted to a network of smaller satellite VICs that are located where the visitors are. This approach allows the management and administration of VICs to be located at Geelong Otway Tourism offices, whilst the face to face services are provided in high traffic areas.

Most other VICs in key destinations in Victoria have focused on creating a larger gateway VIC, co-located with administration.

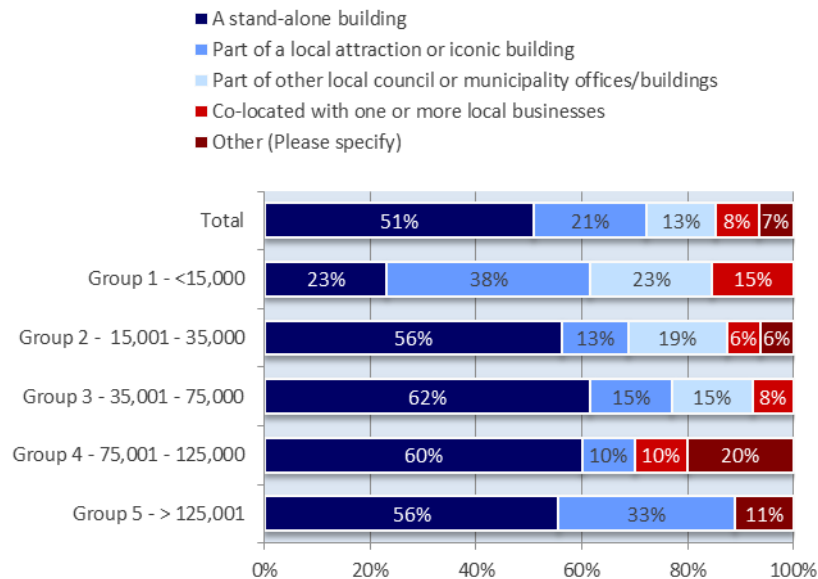
5.3. EXISTING CONDITIONS

5.3.1. VIC BUILDING TYPE

51% of VICs in Victoria are in a stand-alone building, followed by 21% who said their VIC was part of a local attraction or iconic building, 13% reported their VIC was part of other local council or municipality offices/buildings. Only 8% reported their VIC was co-located with another business. Only 7% reported their VIC was co-located with another business.

Groups 2 through to 5 have a similar proportion that occupy a stand-alone building. Interestingly, Group 1 VICs have a relatively lower percentage that are in a stand-alone building (23%) with the majority of VICs in Group 1 located as part of a local attraction or council building (61%).

FIGURE 26 VIC BUILDING TYPE

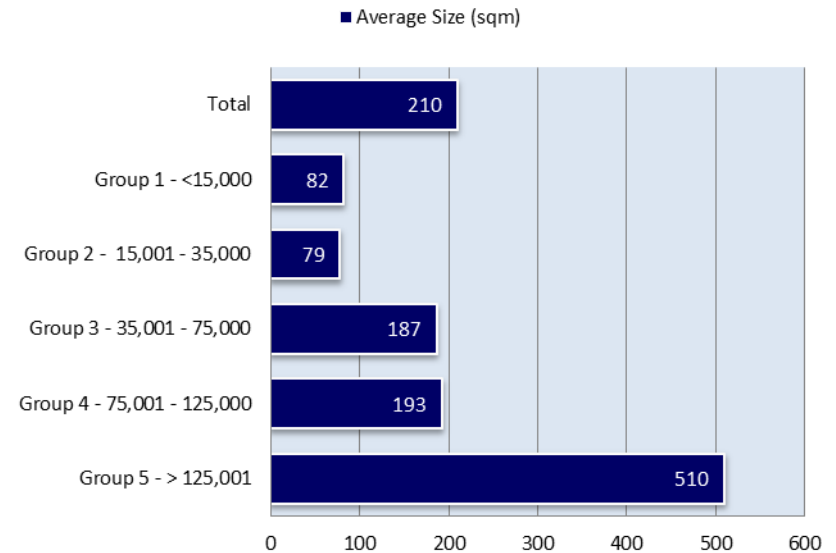


Source: IER Research, as reported by VICs

5.3.2. SIZE OF VICs

The average size for VICs that responded to the survey is 210 square metres. The size of VICs generally increases with the level of visitation. Group 5 reported the highest average floor area of VICs at 510 square metres.

FIGURE 27 VIC AVERAGE SIZE (SQM)



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

5.3.3. PROVISION OF PARKING

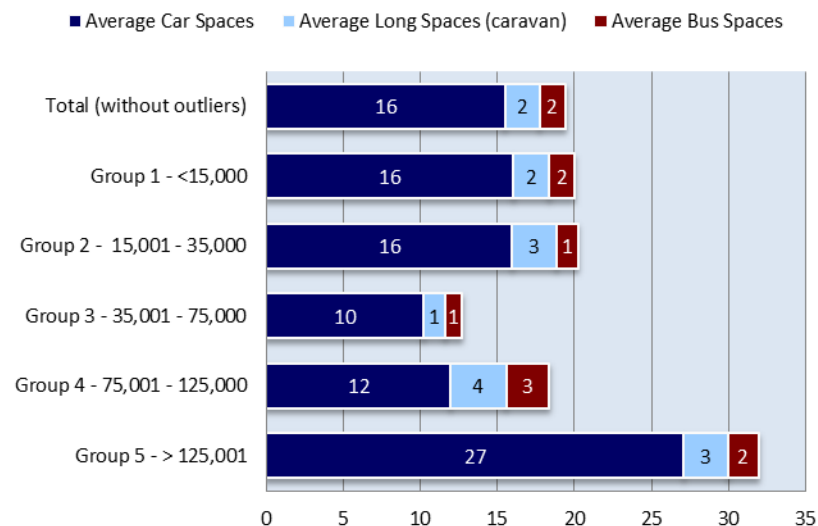
VICs reported having an average of 16 car spaces; this average has been calculated after removing VICs with more than 100 car parks from the data due its distorting effect.

VICs also reported an average of two long vehicle spaces and two bus spaces.

The number of car spaces provided did not increase with the number of walk in visitors. This highlights two things, firstly many larger VICs are likely to be in larger centres and have limited opportunity for parking, and secondly larger VICs are not disadvantaged in attracting walk in visitors by having fewer parking spaces

Extensive parking for VICs is important but not essential, particularly where the VIC is in a larger urban centre.

FIGURE 28 VIC PARKING PROVISION



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

5.4. CONSULTATION OUTCOMES

ADOPTION OF TECHNOLOGY IN VICS

There is no integrated approach to the adoption of technology across the VIC network. However, most of those consulted said technology had been considered within VICs, but to varying degrees across the state. There was consensus amongst the Regional Tourism Boards that technology needs to be integrated further within VICs but that it would be a gradual process. Several VICs have already established Wi-Fi hotspots at their centres and are looking at additional locations to enable greater visitor access to information and an ability to tailor their experience. Some VICs have already set up iPads within their centres and some are looking to do so in the future which would enhance the visitor experience and enable greater interaction.

Touchscreens are already being used at several centres with varying degrees of success. A comment was made that as the touchscreens were mainly operated by external firms, it was more of a disincentive to set them up. Setting up technology that was controlled in house (such as iPads) was more appealing,

DESIGN AND LAYOUT

There are differences in opinion when it comes to the design and layout of a VIC. The design and complexity of a VIC is dependent on a multitude of factors, such as whether the centre is in a gateway location, situated in a historic centre or key regional hub. Geelong Otway Tourism has adopted a unique approach to its VIC at Little River whereby the VIC is a very small modern portable building with little focus on ancillary facilities and display space. The emphasis is on providing visitor information first and foremost and in a quick and efficient way before the visitor continues on to explore the region.

5.5. CASE STUDIES: VIC DESIGN

DESIGN: NOOSA (HASTINGS STREET) VISITOR INFORMATION CENTRE



The Hastings St Visitor Information Centre is a contemporary centre located in a prime location in the centre of town.

This modest 134m² centre provides street shelter, and is shaped to accommodate existing trees and corner site location at the rear of the surf lifesaving club.

The architects were able to extend the roof canopy over the public footpath, inviting people to stop and pause in the shade, perhaps creating incidental visitation.

The building is a distorted L-shape. The centre has multiple customer service points, at one end an external counter operates through a hatch-like window. Internally there is a more conventional desk for general enquiries, as well as an additional booking desk. Beyond this space is the manager's office, staff room and a courtyard, fitted with a

barbeque, predominately for volunteer use. The plan also conceals two discreet car parking spaces for staff use.

The primary room of the centre consists of an information, brochure and map display all on the rear wall. This display runs the length of the wall and reflects the size of the entry to the centre. The primary room also has provision for seating and two yellow podiums. Local maps usually sit atop these podiums, free for visitors to take with them or examine in the centre.

In addition, the centre includes art installations in the form of screen printing on high windows on the rear wall and pod like pendant lamps which hang from the ceiling; these bring qualities of light and air to the space.

The entry to the centre is seamlessly integrated into the streetscape so a visitor could wander into the centre without even realising they were off the street. This is achieved by a large open entry point that rounds the corner of the centre. This allows visitors and passers-by to wander in and out of the centre as they please. The seamless entry is also achieved by the choice of flooring material in the centre; the speckled grey colour laminate is reminiscent of concrete or bitumen that you would find on a typical street. There is an exterior bench seat, located under the italicised "i" where visitors can stop to gather their information or just take a break.

The roof of the centre helps to elevate the public status of the building and addresses the issue of being overshadowed by the surf lifesaving club. The large awnings also generate on street presence and intrigue by close passers-by.

The Hastings St Visitor Information Centre is almost like a gallery space, where their primary business is the provision of information. The design effectively attracts incidental visitation and invites visitors to drift in and out as they please.

Successful small Visitor Information Centres need to be positioned in highly visible locations and high pedestrian traffic areas. Small centres should focus on being highly accessible and having minimal clutter. The Noosa VIC blends into the streetscape and encourages visitors to wander in, with minimal barriers to entry.

DESIGN: NEW YORK VISITOR INFORMATION CENTRE



The custom designed and built New York City Visitor Information Centre was opened in January 2009.

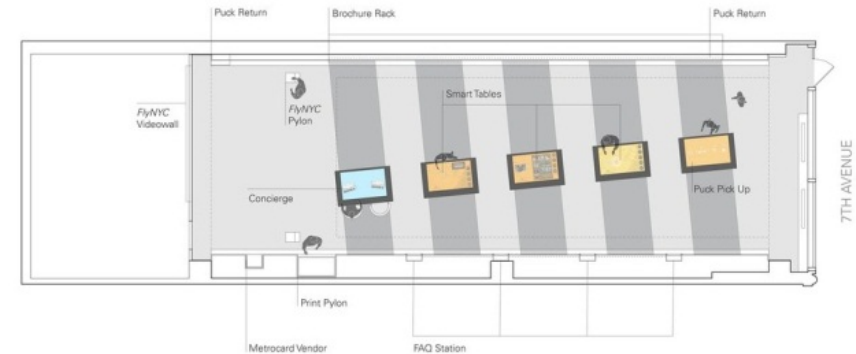
The centre combines elegant design with contemporary technology to create a unique visitor experience.

The renovated storefront façade of the centre is open and light filled, consisting of two large clear glass windows and a large clear glass door. This provides a line of sight all the way through to the rear of the centre from the street as well as providing natural light to the interior of the centre. The black window frames provide a stark contrast to the white coloured interior, framing the interior view.

Once inside, the visitor will find guides and maps along the interior right wall, complemented by messages of welcome in several languages. This hint of multiculturalism is inviting to international guests, and indicates that the centre is accommodating of people of non-English speaking origin. On the left interior wall are touch screen displays and some printed information. Through the centre of the room is a row of interactive mapping tables arranged in a way that guides the visitor through the centre to the fly through mapping screen at the end of the room.

Great attention was given to the lighting of the Centre's interior. The architects created an ambient, adaptable and colourful experience. Recessed light that runs the length of the space infuses the centre with a soft, white illumination, while the light emitted by various media displays brighten the interior without the use of direct lighting.

Overall, the space is open plan and clutter free; it does not contain masses of printed information that can overwhelm the visitor. The space is easily navigable and has an inviting street presence. Visitor Information Centres that are unburdened by masses of information on display will do well to create an information environment that is not overwhelming to the visitor.



In the age of information technology, a less is more approach can provide much clearer messaging for visitors and allows visitors to explore the region or destination through the assistance of interactive screens and VIC staff. Smart screens also allow for multiple languages, which is particularly important for international tourists.

DESIGN AND OPERATION: BENDIGO VISITOR INFORMATION CENTRE



The Bendigo Visitor Information Centre has been an industry leader in the provision of visitor information services. It has won numerous state and national awards for its innovative visitor servicing programs, industry capacity building and the development of key strategic partnerships. The visitor centre is proudly supported and operated by the City of Greater Bendigo.

The centre has been located in Bendigo's former historic post office for over 15 years and is located in the heart of town. It has on street parking and showcases Bendigo's heritage strengths.

The VIC underwent a refurbishment in 2010 to further align to Bendigo's brand strengths and facilitate the diversification of its business model. The refurbished facility now includes:

- Two cultural art spaces - Living Arts Space and Post Office Gallery (satellite of Bendigo Art Gallery);
- A large retail area;
- On floor individual booking desks;
- Information displays;

- Unique storage options;
- Off floor office space; and
- A large meeting / conference room.

The image opposite shows the internal fit-out of the VIC. The refurbishment provides an excellent example of developing a VIC within the constraints of a heritage building.

The Bendigo Visitor Information Centre is a central hub for local and regional tourism activity and provides a case study for a well-developed strategic VIC framework. Features of the framework include:

- Strong industry links supported by membership;
- Strong links with Bendigo's event and marketing units;
- Heathcote VIC established as a satellite centre (same Local Government Area);
- Supporting regional VICs through the Goldfields VIC Network; and
- Taking visitor servicing to the visitors via:
 - Roving visitor information ambassadors;
 - Ambassadors on key Bendigo bound V-Line train services during identified peak periods; and
 - Establishing temporary visitor information booths to support exhibitions and key events.

The strong integration between the Local Government, local tourism industry association (Bendigo Tourism) and other key stakeholders has been critical to the success of the VIC. This has resulted in high levels of industry buy in, a strong and successful booking service and conversion on Bendigo's branding and marketing campaigns. In turn this has contributed to the bigger picture in growing the yield for Bendigo.

The Bendigo VIC is funded and operated through Local Government but in close partnership with Bendigo Tourism (Local Tourism Association).

Bendigo Regional Tourism Board (BRTB) is working with 4 Local Government areas which in turn deliver visitor services through their VICs.

The integration between visitor servicing and tourism product and marketing in Bendigo is seamless and provides a strong argument for transition of gateway VICs into tourism hubs providing a broader tourism role than visitor information delivery.

LAUNCESTON VISITOR INFORMATION CENTRE

The Launceston VIC has recently relocated and adopted one content management system (CMS) across all of its digital platforms, largely drawing content from ATDW and the VIC's own booking system. The main reason for moving to a common CMS was to minimise the duplication of effort so that information could be easily transferred to other platforms and maintain content more easily. It was also motivated by the recognition that more and more people are obtaining their information from digital devices which was part of the overall strategy to move into a more modern delivery model for the VIC services and to improve customer service. The smartphone app, touchscreens, use of iPads and free wifi in the centre and the (still to be launched) revised website were all a part of the technology component of the project. The relocation of the centre to a new building enabled Centre staff to plan for the digital implementation from the beginning which facilitated the transition.

Launceston uses bookeasy as its booking system and this is integrated with the CMS, but the app also allows visits to individual operator websites who have their own booking systems online. The Launceston City Council's IT Department is the first port of call for any technological glitches, and it then makes an assessment about whether the problem is within its scope or whether it is either a hardware or a programming issue. The Centre has spare iPads to deal with any issues that arise with the units and the centre's internet access is separate from the Council's system, so any down time on the server does not affect the Centre.

The way in which visitors traditionally interacted with staff and gathered information has changed in the new Centre, with high service counters removed and a more casual and open atmosphere created. There is a concierge desk which is visible but not intrusive as visitors walk in, then the next most obvious service area is the touchscreens and table where iPads are set up, and the booking desks are island stations that are located at the back of the Centre. If a visitor has a simple question, the concierge can assist, floating

staff can assist anyone who needs help with the technology and the booking desks are located away from the main activity if someone needs assistance to make bookings. There is a small retail space and a wall of brochures. Electronic screens are used throughout the Centre to display information about the weather, product and events.

The project was funded entirely from a project budget allocation by Council. The relocation of the visitor centre, removal of the old visitor desk at the airport, decommissioning of the old visitor centre, and the introduction of touchscreens, Wi-Fi, CMS, website and app development were all part of two project budgets. The total budget was just over \$200,000, plus a further \$30,000 in project costs allocated for the website and events calendar revision. An estimation of software development was approximately \$20,000 with touch screens costing approximately \$7,000 and the iPads \$750.

Launceston highlights a new approach to the development of VICs which has digital technology considered in the design of the Centre. The most important improvement to the provision of visitor information services was the adoption of one content management system. This approach streamlines information to be used on many different platforms.

6. VIC LOCATION

6.1. INTRODUCTION

The optimum location for a VIC is often widely debated by decision makers, particularly with regard to gateway and in town locations. This section explores the current locations of VICs and their reason for being located in their current positions.

6.2. KEY FINDINGS

REASON FOR VIC

VICs should not be viewed as a way to attract tourists. Their primary role is to serve a tourist in an established or emerging destination. It is very difficult to achieve strong economic flow on benefits from a VIC which is not located within an area with an established or emerging industry.

Visitor Information Centres need to have the following attributes:

- A strong or emerging tourism industry;
- Strong links with the tourism industry;
- An ability to disperse visitors through a region; and
- Be located in a high traffic area, allowing for incidental visitation.

Visitor Information Centres should not be developed as a way to “attract” tourists; their primary aim is to serve an existing strong or emerging tourism industry with the support of local operators.

GATEWAY LOCATION OR IN-TOWN LOCATION

In large towns with multiple entry points, CBD location is more important than a “Gateway location”. Examples include Ballarat, Bendigo, and Benalla.

A gateway location should only be considered where it is understood that the vast majority of visitors can pass the VIC; examples include Newhaven VIC or the Little River VIC. Whilst the parking and access advantages of gateway VICs are strong, evidence shows that VICs which have moved from gateway to in-town locations have had strong levels of walk in visitor growth. One of the main reasons for this is the opportunity to attract incidental visitors who are in town shopping or dining.

An example of this was the growth in visitation to the Wangaratta VIC when it was relocated to a central town location from its original gateway location.

Gateway locations for Visitor Information Centres should only be considered when it is clear that the vast majority of visitors are passing through. In-town centres have been proven to attract higher number of visitors and provide an opportunity for visitors to visit the VIC and shop and dine in town

6.3. EXISTING CONDITIONS

6.3.1. LOCATION DETERMINATION

The majority of respondents to the survey conducted by IER reported that the reason for the location of their VIC was because the site was available (57%), followed by 43% who reported the location was identified through a strategic plan/feasibility plan. 30% reported it was due to community interest and 11% were unsure.

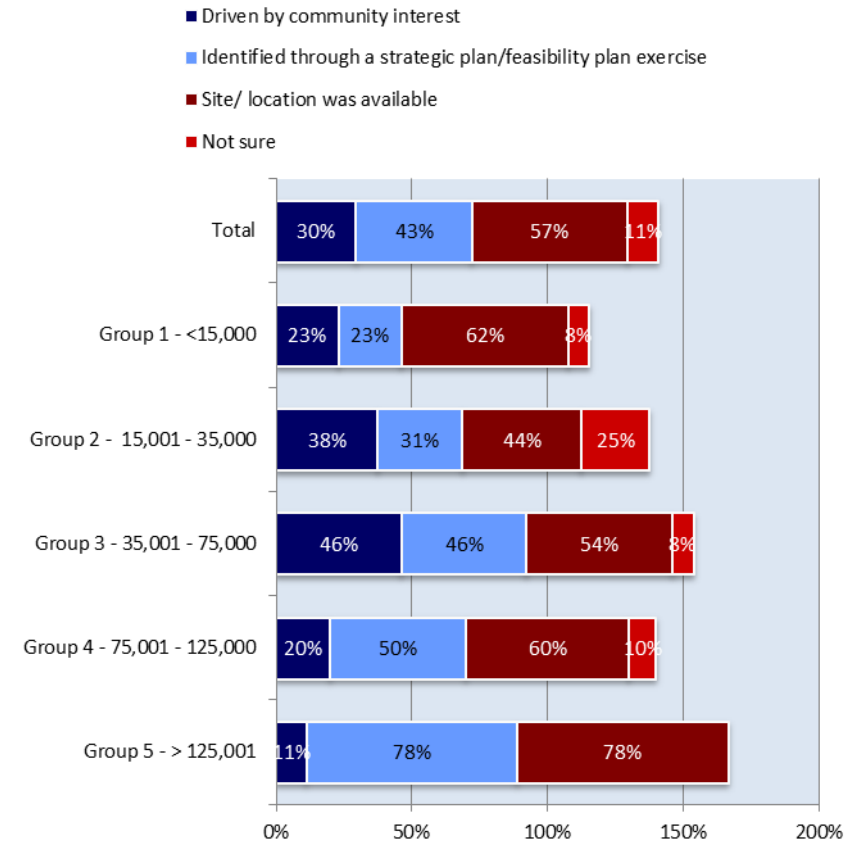
VICs with higher visitation were more likely to be situated through a strategic plan/feasibility study and the site being available; therefore the location is less driven by community interest.

VICs with fewer than 15,000 visitors were more likely to be located in their current location simply because there was a site available to occupy.

The location of mid-range visitation VICs (Groups 2 and 3) are more heavily driven by community interest than other visitation groups.

The lack of strategic planning or feasibility studies to identify the need and the best location for VICs with low levels of visitation is an issue, particularly given Local Governments' commitment to VICs and the funding resources allocated to these.

FIGURE 29 REASON FOR VIC LOCATIONS



Source: IER Research, calculated by Urban Enterprise, as reported by VICs

6.4. LOCATION CASE STUDIES

LORNE VISITOR INFORMATION CENTRE

The Lorne VIC is operated by the Surf Coast Shire and is situated at the entry point to Lorne next to the main tourist hub. The Centre opened in 2005, following a move from its original position along Mountjoy Parade, Lorne's main street. Despite the original VIC being positioned in the town's centre, there were several features of this location that did not facilitate ease of access which affected visitation, such as being located on the second floor with no disabled access and limited parking. Although it is still located on Mountjoy Parade, the current VIC is in a much more suitable location. It is situated on the left hand side of the road as people enter Lorne and has extensive car and coach parking available. Following relocation and new centre, visitor numbers have increased by approximately 60,000 per annum, with the centre now receiving approximately 180,000 visitors in the 2011-12 financial year.

When the Centre was planned, not only was its location given careful consideration but the interior was also considered, as an opportunity to generate revenue. The Centre is approximately 300m² and is used for displays and exhibition space as well as computers. The Centre management is continually considering ways to maximise the centre's use and attract visitors. Towards the end of 2012, Wi-Fi was set up at the Centre, which has been successful in attracting additional visitors. As visitors access the Wi-Fi network, the Centre is able to control the content the visitors view before they start using the internet for personal use. This enables the promotion of the website of a local attraction, the region's Facebook page or the main regional website to visitors.

The Centre will enter a new stage in the near future, as the Great Ocean Road National Heritage Centre is planned as an addition to the current building. The Centre will tell the story of the construction and history of the Great Ocean Road and will create further incentive to visit the VIC.

In order to facilitate visitor access to a VIC, positioning is crucial. An eye catching location on a main visitor route with close access to a town's commercial precinct and adequate parking form the basis to maximising VIC visitation.

GEELONG AND GREAT OCEAN ROAD VISITOR INFORMATION CENTRE [LITTLE RIVER]

The Geelong and Great Ocean Road VIC is located on the Princes Highway next to a BP service station approximately 26km from Geelong and at the gateway to the Bellarine Peninsula and the Great Ocean Road. It is one of two accredited VICs within the City of Greater Geelong and operates as a satellite to the Geelong VIC. The centre has been operational for just over three years, after relocating in 2009 from its position in Corio, a suburb of Geelong. The decision to relocate from Corio was a result of the Geelong bypass which, following its construction resulted in a reduction in Corio VIC visitation by approximately 20,000 per annum. A new location was sought in order to capture visitors heading towards Geelong and those travelling directly to the Great Ocean Road and bypassing Geelong.

The site at Little River was leased from the service station management and took approximately 12 months to set up. It was initially run on a trial basis, within a portable building, in order to gauge visitor interest. This minimised risk, as if the site was not successful they could try a different location. After 12 months, based on visitation to the VIC and service station, the decision was made to develop a permanent VIC at the site.

Although the building is significantly smaller than the previous building at Corio, the cost to run the Geelong and Great Ocean Road VICs is slightly higher. The additional costs include the leasing arrangements with the service station, as well as petrol money and lunch provision for the volunteers who work there. Conversely, all amenities were already provided by the service station including toilets and parking which facilitated the initial set up. The building's compact size works well for this location and Geelong Otway Tourism does not see the need for merchandise or any large display areas. As there are no additional attractions on site to keep the visitor for a long period of time, visitors only stop briefly before travelling to their next destination.

Visitation to the Little River site was lower than originally forecast. Prior to the construction of the Geelong Ring Road, the Corio site received approximately 64,000 people per annum through its doors, the Little River site presently receives about 42,000. In comparison, the Geelong VIC at the National Wool Centre in the city centre receives approximately 80,000 visitors per annum.

A small, compact, no frills VIC design and layout can meet visitor needs in a gateway location. These VICs however need to be linked to a broader network in order to provide the support, storage, administration and management.

7. DIGITAL MEDIA

7.1. INTRODUCTION

This section draws on a report prepared by ITours Australia and provides an outline of emerging trends in technology and consumption of digital media.

Technology is undergoing massive shifts on a number of fronts, creating a perfect digital storm and giving rise to unprecedented changes in user behaviour and information consumption. This has affected walk in visitation to VICs and the recent survey by IER research highlights that all VICs are grappling with how to progress in the changing digital world.

Mobile technology is delivering the most significant changes of our time, leading to this being known as “the Age of Mobile”. Mobile will be the main digital channel and way to engage with customers and visitors over the next 5 years. Consumers and visitors will constantly evaluate their digital experience based on their core desire for convenience - immediacy, simplicity and context.

7.2. KEY FINDINGS

RESOURCES TO DELIVER INFORMATION TECHNOLOGY

The delivery of new and updated information technology is out of the resource capabilities of many VICs. This includes the capital to implement new technology and equip staff with the skills to oversee and operate any new technology. The IER survey highlighted that VICs were most concerned with how and what to deliver in the face of emerging technology.

In addition, many VICs were linked to Local Government IT systems and policy which has created significant constraints on the uptake of information technology.

Moving forward, delivery of digital media and information technology needs leadership at the regional and state levels.

TECHNOLOGY REQUIRED TO MEET VISITOR NEEDS AND EXPECTATIONS

Whilst most visitors to information centres are seeking face to face engagement with staff or volunteers, there is much to be done in providing visitors with greater access to high quality targeted information on visitor needs.

The internet age is now being surpassed by the mobile age and with it, visitors’ desire to access, download, and upload information whilst on their trip is increasing.

The greatest opportunity in the short term to medium term in relation to digital information is to develop information websites and applications which allow information to be tailored to the visitor’s preferences, timeframes and location. The delivery of this information can occur on a myriad of devices, either personal devices or larger screens at Visitor Information Centres.

7.3. CONSUMPTION OF DIGITAL MEDIA

The digital revolution is already upon us. Advances in digital technology have made information available at our fingertips. Technology facilitates delivering information that is personalised right to where we are at the moment. Information from around the world can be accessed at any time and by anyone. Our ability to share information is serviced by technology in the form of social media.

There is a major convergence of channels, and social, local, and mobile will work as part of an integrated initiative as they speak to key travel behaviours such as sharing experiences, immediate information and anytime access. The following statistics highlight this:

- 50% of all new internet connections worldwide are coming from mobile devices.
- 63% of females and 73% of male owners of smartphones don't go an hour without checking their phone;
- Mobile users aged 18 - 24 send an average of 109.5 text messages per day;
- Nearly 15% of all web traffic in the world occurs beyond the PC and this is accelerating;
- 1 in every 4 minutes spent online is spent on social networking;
- Accessing social networking on mobile grew 153% in 12 months. This was the highest growth category;
- Smartphone ownership passed feature phone ownership as at Sept 2012;
- 1 in 10 US retail dollars are spent via mobile devices; and
- Second screening: more than 80% of smart phone users and tablet owners use these devices while watching TV.

This has a profound impact on the way visitors use and access information:

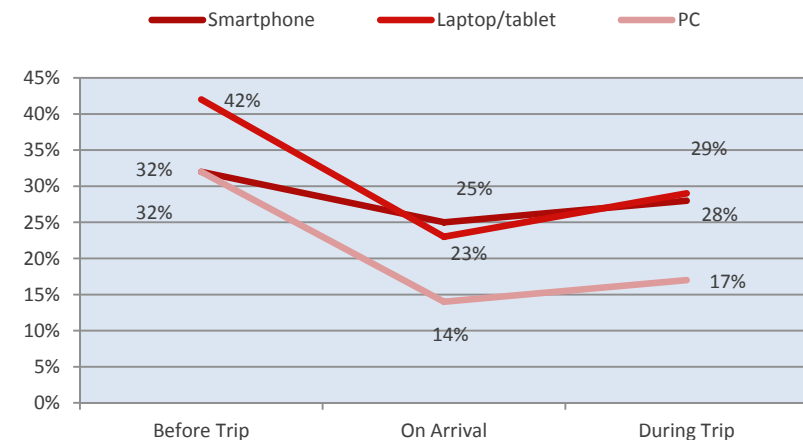
- 43% of leisure travellers who own a smartphone use mobile internet for travel purposes such as searching for hotels;
- 17% have researched a trip on a mobile app or mobile website and 12% have downloaded a mobile app related to travel;

- Two thirds say they are likely to explore, shop and book travel activities via their mobile devices;
- More than half of all leisure travellers and nearly three in four business travellers now own a smartphone and mobile travel bookings are expected to triple in 2013; and
- More than half of business customers now use mobile technology when it comes to searching and booking hotels, indicating a rapid increase in the use of mobile technology in the business travel sector.

7.3.1. CITY OF MELBOURNE RESEARCH

Research undertaken in the City of Melbourne's "The Visitor Journey" study identified the use of digital platforms before, on arrival and during the trip. Over the journey, laptops and tablets are used most, followed by smartphones. PCs are predominately used before the trip.

FIGURE 30 TECHNOLOGY PATTERNS OVER JOURNEY - CITY OF MELBOURNE VISITORS



Source: City of Melbourne and Nitty Gritty Research

7.4. CONSUMER TRENDS AS A CONSEQUENCE OF DIGITAL MEDIA

As fast as technology is changing, consumer behaviour is changing too. Consumers will be the arbiter of which technology advances will be successful and which will not be, but the overarching trend for the consumer is the growing acceptance that this pace of change is now a way of life. These changes make it incredibly difficult for individual Visitor Information Centres to keep pace with the consumer.

HYPERACTIVITY – CONSUMERS/ VISITORS ARE ALWAYS “ON”

Mobile devices and wireless and broadband technology allow instant access in consumers' hands. Increasingly, access to information is happening through mobile devices and not via other devices.

Consumer touch points when travelling are becoming ubiquitous at every stage of the travel process based on the consumer desire for convenience.

It is a global phenomenon. 73% of international independent travellers from China to Australia bring their mobile phone on holidays with them and use them to take and share photos, using social media, finding information on the places they are visiting and navigating their way around (ITours Australia Chinese FIT monitor, February 2013).

INSTANT GRATIFICATION

Consumers and visitors are always “on” and expect instant knowledge gratification from technology. There is a new term for instant and expected access to information - “infogratisation”. Just as going online is no longer about sitting at a computer at a desk, access to information will no longer be tied to text search. Currently you can access information through other platforms such as QR Codes, augmented reality and tagging. And there are many examples of readily available applications such as Google Goggles and Layar.

The next frontier is visual infogratisation - pointing at an object encountered in the real world and receiving information on it. This is a significant growth opportunity in the highly visual experience that is tourism.

Increased processing and access speed as well as anytime access delivered by cloud computing will be the information driver, enabler and accelerator. Consumers require storage and retrieval of data anywhere, anytime, and at greater speeds and across devices.

Limited access to high speed internet in regional areas of Victoria provides a hindrance to trends of instant gratification and hyperactivity. Visitor Information Centres providing Wi-Fi will assist visitors with their need to access online information and their social media needs.

7.5. FUTURE TECHNOLOGY

The trends highlighted in this report have been selected because of their relevance to tourism, visitor services and information transfer. While some of these technologies seem improbable, most of the development work is in play now. The overarching trend is that it will all be delivered in the near future and become the accepted norm in a very short space of time.

EMBEDDED TECHNOLOGY FOR INFORMATION TRANSFER

Called the “Internet of THINGS”, this is the fusion of the physical world and the digital world where technology is embedded into real world things. Mobile and other devices capture these labels, barcodes, sensors or photos to link the real world to the cyberworld.

There are many examples of this already in existence such as RFID codes on runners' bibs in a marathon or codes embedded in museum pieces that produce a flow of information when triggered.

Gadgets like Google Glasses are on the verge of becoming widely available. There are already ski goggles which display a tiny screen which lets you not only sync to your mobile device but helps you determine where you are and how fast you are going.

In the future, the reduction in cost of embedding technology will enable manufacturers and marketers to build in or add sensors, making any sort of product, service or location information accessible and mobile.

Websites and applications which simply provide static information will become dated, and visitors will soon have access to information that is far more tailored to their needs and that links location and visitors' own preferences.

HUMANISATION OF TECHNOLOGY

The era of cognitive systems will see humans and machines collaborate, bringing their own skills to each. The machines will be analytical and rational. Humans will bring emotion, empathy and moral compass and creativity.

With the advanced engagement of people with technology, the interfaces are becoming more human centric and engaging, increasing the ability to respond more "intuitively" to user's needs through the capture and analysis of user patterns. An example is 3D virtual assistants at Dubai International Airport.

However, technology is advancing so much that machines are able to mimic and augment the senses. "Sensory intelligence" is already a reality, for example in cars or biometric security. On the reverse side, "haptics" allow consumers to "feel" through technology, such as sensing through the skin surface such as feeling the pebbly surface of a basketball, or sensing through muscle tightening for a deeper kinaesthetic sensing.

Putting this in a tourism context, there is the ability to take a visitor on a sensory journey - imagine detecting and identifying the smell a eucalyptus leaf, hearing the sound of the sea, feel the sand beneath your toes.

EXTREME INFORMATION MANAGEMENT

So much information is collected now that organisations are struggling to come to terms with how to organise that data into meaningful information. Currently there is "data surplus and insight deficit" - more of our data is being collected, mined and stored, that doesn't mean it is being interpreted meaningfully. But the next few years will see organisations that own that data start to figure out what to do with it, such as using it to "optimise, predict, score and forecast". The correct and efficient analysis of this data results in knowing your target intimately and delivering information that is personalised and relevant, driving context which is a key trend.

DEVICE CONVERGENCE

In the near future, mobile phones will do everything, but they do not always deliver the best experience in all circumstances, for example, reading, viewing, processing or creating. Consumers have shifted from the single desktop to the use of multiple devices in a myriad of settings. But the current gap is lack of access to all your data, programmes and application across all the devices a user chooses to work with.

This creates a complexity in the form of multiple touchpoints and the need for access to information across multiple devices, difference delivery scenarios, device and model variations and differences in platforms. This will be resolved in the future. Technology is already developed in areas like storage through the Cloud and responsive design - where a programme or application responds to the dimensions and functionality of a range of devices to produce the optimal viewing experience on each device, rather than a compromised experience that exists now.

Even TV is becoming a "smart" device and the renaissance of TV - beyond viewing - to interaction, is driven by televisions interacting with other devices and accessing online data, known as "conjoined consumption". "Second screening", or watching one screen while interacting with another, has become a verb in a very short period.

COMPUTING POWER

In the future, the fancy features of today's smart phones will become commonplace. They will also contain new sensors that will expand environmental cues beyond location. Motion, voice and touch will be the common interface and high definition capability will expand.

But these extra functions and massive databases will need more power to be useful. Multicore processors in all devices will start to deliver mega processing abilities - hundreds of times faster than today's processors - as the information supply, device sophistication and consumer demand grows.

MOBILE MONEY

Mobile payments are set to take off, with support from technology, device manufacturers and retailers. It won't be long before paying with your mobile will become the norm.

New technologies such as mobile wallets, near-field communication (NFC), are enabling mobile payment systems, which can streamline both purchasing and expense processing,

particularly for business travellers. NFC is built into most new smart phones with Apple iPhones being the current notable exception. As an alternative, Apple has embedded a “passbook” app on the iPhone 5. The feature allows users to save and redeem coupons and buy products all in one application on their phone. However, experts predict that it is just a matter of time before Apple embraces NFC and incorporates it into a future model.

THE TRADE OFF – PRIVACY FOR RELEVANCE

The current generation of digital “natives” don’t seem to care about privacy as those that were dragged into the digital age. Digital natives assume that everything they post, everywhere they go, is captured and aggregated and will become public information.

Our attitudes and how we act towards our own privacy will change in the coming years because of the constant data collection and the ever growing number of services that ask you to share something about yourself.

The trade-off of profiling will allow for contextually relevant or personalised data to be delivered to the device that you require, and that that level of convenience and immediacy is likely to be deemed worth the privacy sacrifice.

7.6. CONSULTATION OUTCOMES

Recent advances in technology are affecting the current service model of VICs, with technological integration varying across the state. Some smaller VICs have done very little to adopt technology at their centres due to limited resources. Some centres also find it challenging due to resource allocations within council if they are particularly reliant on internal information technology support to maintain iPads, touchscreens and content management systems.

Several VICs voiced their concerns regarding the lack of understanding from management within council as to the additional support required once a new digital device has been implemented. There are additional staff allocations that need to be arranged as well as staff training and general changes in regards to the day to day running of the centre with the adoption of new technology. Despite some centres having sophisticated content management systems whereby the operator can update their own information; there is still the initial and ongoing operator education that can be very labour intensive. In order to install additional digital communication into VICs, a clear understanding of the overall implementation costs and what the current benchmarks are is critical.

VICs were conscious of the fact that if they did not advance with technology they might become obsolete to a certain extent. The popularity of Trip Advisor was a key concern for centres and ways to channel these resources to drive visitation need to be explored. In order for VICs to maintain their uniqueness and remain relevant, they need to promote their point of difference for someone who already has access to Trip Adviser. It was noted in consultation that VICs need to ensure that the experience visitors had within a VIC was unforgettable and the service unparalleled in order to remain relevant and have an edge over technology.

The fact that visitors can access information online 24 hours a day was highlighted as a threat to the future of VICs due to the current nine to five pm opening hours. Hence access to quality after hours information needs to be a focus, as does the ability to respond to social media channels after the centre has closed. Ballarat VIC does have Twitter and Facebook accounts that are responded to out of business hours, but this is on an ad hoc basis. Several VICs also have touchscreens within their centre for after hours information, which in the case of East Gippsland was especially made use of in emergency situations.

Current technology being used within centres include, free Wi-Fi hotspots, using the JIBS (Jewel Integrated Booking System) which enables integration with the destination website and reduces administration.

Looking at a more regional approach to delivering digital communications to the visitor is seen as increasingly important, with the North East region specifically highlighting a new digital platform they are in the process of rolling out, whereby all regional websites will be reproduced and streamlined providing more of a uniformed online presence. The VICs will play a key role in this project by assisting feed information into these outlets. The Great Ocean Road was also in the initial stages of developing a digital strategy which would include how the VIC can be integrated into this.

It was seen as important for the VIC managers to be more involved with the region’s online presence with more ownership over the websites and click throughs to the websites. The RTBs acknowledge they need to empower the VICs and involve them more in the digital space. Furthermore, they see the VICs as having an ability to play a greater role in industry development and operator education and diversification of their present roles within the centres.

7.7. DIGITAL MEDIA CASE STUDIES

NEW YORK CITY INFORMATION CENTRE



The digital media provision in the New York City Information Centre reinvented the way visitors navigate the city.

The key digital media feature of the Centre is the interactive mapping and information tables. These allow the user to access area specific information based on a range of categories and user preferences. A 'digital puck' is used to generate the user specific experience. Once placed on one of the interactive mapping tables, it displays colour coded attractions and category specific information based on the user's criteria. The user can select and save any information they stumble upon to the 'digital puck', this information becomes a personalised itinerary for their visit to NYC.

The information saved onto the puck can then be printed, emailed or texted to the user. This removes the need for a mass of printed brochures and displays; it also allows the visitor to have a digital copy of their itinerary in the palm of their hand which is easily accessible at any time.

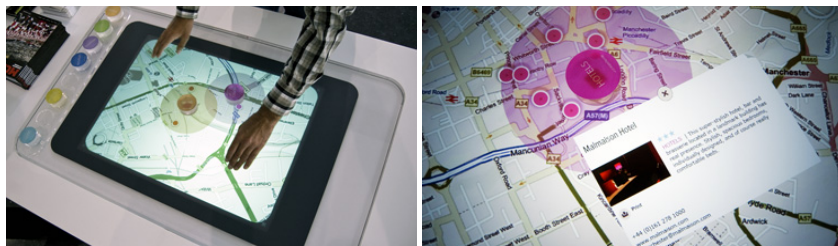
The visitor has the option of taking their digital puck to the media wall at the rear of the Centre, which, using Google Earth, creates a virtual fly through of the city, outlining the specific itinerary saved onto the 'digital puck'.

Touch screens on one side of the centre allow visitors to get answers to the top 100 frequently asked questions in ten different languages as well as other information about the city. The touch screens provide free Wi-Fi access, which means visitors can seek any information they wish.



Digital systems at NYC allow information to be tailored to the needs and preferences of the visitor. Whilst large interpretive screens will be out of scope of the resources available to many VICs in Australia, the approach of allowing visitors to tailor information they receive to their interests is an opportunity which VICs should consider further.

MANCHESTER CITY VISITOR INFORMATION CENTRE



The Manchester City VIC uses digital technology to engage the visitor in an interactive experience. This is achieved by using an application installed on Microsoft Surface tables, which allow the visitor to virtually explore what the city of Manchester has to offer.

The interactive tables use categorised 'digital pucks' (similar to those used in NYC). There are eight different categorised 'pucks' including; hotels, museums & galleries, nightlife, what's on, shopping and dining. A selected 'digital puck' is placed on the surface table, which is a digital map of Manchester city, the map will then display the options on the screen for the chosen category. The radius at which information is seen can either be expanded or contracted simply by turning the digital puck clockwise or counter clockwise. This means visitors can select a certain event, look at the associated times, description of the venue and show any related costs. Any information collated during their searches on the interactive maps can be printed for free.

The content within the Microsoft Surface tables is updated from Manchester's Destination Marketing Service.

The centre also has a 'media wall' at the rear of the Centre which showcases tourism products best suited to the current moment in time; this is designed to increase membership engagement and therefore revenue generation. It also allows visitors the chance to see current information from tourism businesses.

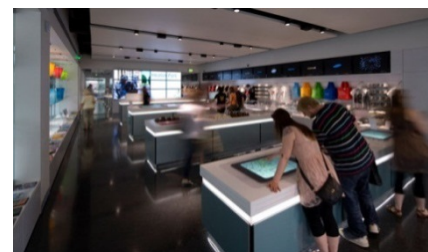
There are multiple flat screen monitors around the centre which display live twitter feeds from visitmanchester.com from a range of sources, including tourism businesses, residents and visitors and events data from the destination management service. The Twitter feed is filtered to keep out unwanted information.

The Centre also has PCs for customers use. Visitors can book accommodation, transport and events, and search for further information in more detail on places or events they've heard about or picked up on through visitmanchester.com and other sources.

Some research was conducted by Qa research, UK, on the effectiveness of the Manchester City Visitor Information Centre, some of the quantified results were:

- Shorter queues;
- 52% of visitors used either the surface tables or the PC to gain visitor information;
- Younger respondents particularly were more likely to use the surface tables and computer without assistance from a member of staff;
- 43% of visitors aged 16-25 used surface tables independently compared to 20% of those aged 36 to 45;
- 58% of visitors discovered new places to visit through using the technology;
- 66% of visitors cited the information technology provision as a reason why they'd use the VIC again.

The Manchester Visitor Information Centre has developed an interactive way for visitors to self-discover information. The screens used are expensive and duplicate information available through visitmanchester.com. There is a long term risk that the interactive technology is in danger of becoming a gimmick rather than a sustainable, effective model for future Visitor Information Centres.



NEW ZEALAND – WEBSITE

www.newzealand.com

The New Zealand tourism website welcomes first time visitors by first asking them to identify their location and subsequently choosing their purpose of visit, either for travel or for business. For purposes of this analysis, the website journey is based on a "for travel" visit from Australia.



The website is heavily centred around Tourism New Zealand's current marketing campaign which is based on the idea of New Zealand as 'Middle Earth' playing on the recent release of the movie The Hobbit.

Rather than burden the user with information, the website tells a story of the possibilities on offer. This is achieved by using Hobbit themed illustrations that morph into real images of New Zealand in a slideshow format. Each picture is complemented by a caption that relates to the experience and hints at the possibilities. Examples of these are shown in the following images.

Information on pricing does not properly enter the viewer's journey through the slideshow until the final slide is presented, which has a brief amount of information on visiting the Hobbit set and basic costing.

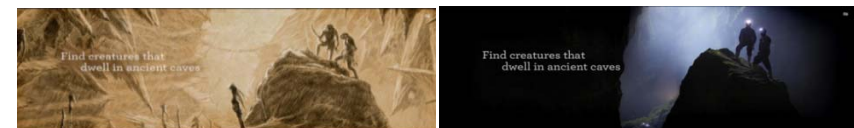
ADVENTURES – MOUNTAIN HIKING



EXPERIENCES – WINERIES



ADVENTURES – CAVES



EXPERIENCES – 'HOBBITON'



Scrolling down through the webpage begins to offer snippets of information about what to do in New Zealand. The information presented is only complementary to the images of New Zealand. The images aim to sell New Zealand to the potential traveller, with the snippets of travel information providing the complementary detail so that the visitor can see that these experiences are a real and potential possibility for them.



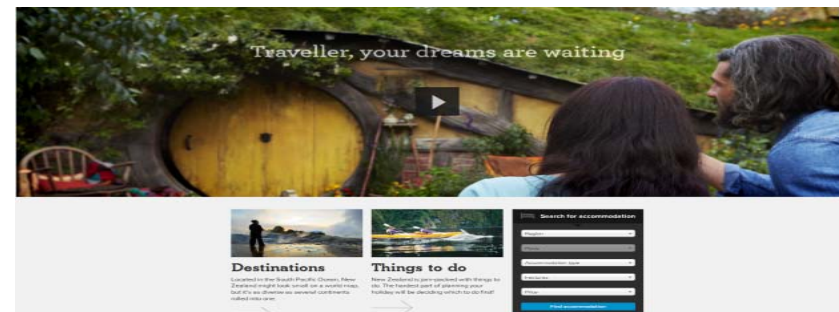
Toward the bottom of the page, links to information entitled Essential New Zealand is presented as six recommended experiences to a complete New Zealand holiday, information on finding and booking flights from your destination, specified when first entering the website.



Other information relating to Maori culture, national parks, airlines and airports and Queenstown are again presented through heavy use of imagery and links to information on these topics.

Finally, the bottom of the web page reveals the video ad campaign for tourism New Zealand and links to destinations, things to do and an accommodation search.

The video campaign reinforces the message the visitor has already seen and again plays on the possibilities New Zealand has on offer.



The website aims to intrigue the viewer not overwhelm them with information. It aims to capture the visitor's imagination, in order to prioritise New Zealand as an essential destination in the visitor's mind. Once the visitor has decided that New Zealand is the place to go, the information they require is all there for them to discover. This is in part achieved by an information bar at the top of the website. When you scroll through the website, this remains at the top, providing drop down menus to destinations, things to do, facts about New Zealand, getting here, getting around and accommodation.

These lessons are not only applicable to tourism region's websites, but also VICs. The content should aim to inspire the visitor, capture their imagination and then provide the information resources to guide them in the right place to have their desired experience.

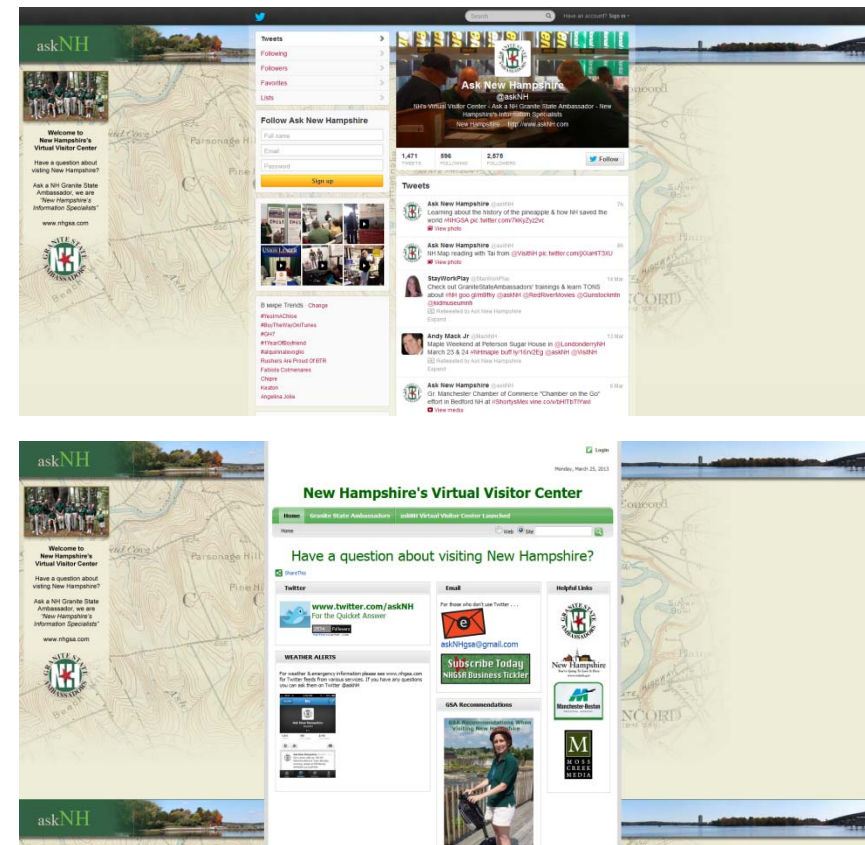
Most Victorian tourist websites are over cluttered with lists of information and trip options which confuse the visitor. Tailoring information to visitor needs and preferences needs to be explored further, so that information provided is targeted to visitor needs and the research is not lost in information that is irrelevant or uninteresting to the visitor.

VIRTUAL VIC: NEW HAMPSHIRE

New Hampshire has created a 'virtual Visitor Centre' which is available 24 hours a day through a Twitter account called "Ask New Hampshire" (Twitter handle is asknh, or link at <https://twitter.com/asknh>). This enables visitors to ask real time questions about the destination through twitter or via an email address which is staffed by volunteer "Ambassadors" who work in the physical Visitor Information Centres. The staff also monitor and tweet "What's On" information, promotions and special offers in the local area. The live Twitter stream is embedded on their

The live Twitter stream is embedded on their Ambassador website as seen below (www.nhgsa.com).

A virtual VIC would be difficult for a single VIC to run, however there is opportunity for Regional Tourism Organisations or Boards to take leadership in this area, drawing on human resources across the region.



8. INFORMATION AND BOOKINGS

8.1. INTRODUCTION

The collection, sharing and distribution of information by Visitor Information Centres in Victoria is often undertaken in a silo. Other states, such as Queensland, have adopted the use of the Australian Tourism Data Warehouse more widely and this approach has highlighted the benefit of having a consolidated database for collection and sharing of visitor information.

This section analyses information requested by visitors and the reason for visiting VICs as well as the current approach to booking systems in Australia.

8.2. KEY FINDINGS

8.2.1. COLLECTION, STORAGE AND DISTRIBUTION OF INFORMATION

There is a need to consolidate visitor information databases at a Regional and State level to ensure that tourism organisations, VICs and visitors can access accurate information. The collection and storage of accurate information is also important for tourism destination management planning.

The Australian Tourism Data Warehouse provides opportunity for Victorian VICs to link in with other VICs for online storage of tourism product. This should be explored broadly across the State. VICs need to consider one content management system that links all digital platforms.

8.2.2. VISITOR INFORMATION ENQUIRY

A journal article “Meeting the Needs of Tourists: The Role and Function of Australian Visitor Information Centers”³ has highlighted that as many enquiries are made about regional product as local product at Visitor Information Centres.

8.2.3. BOOKINGS

There is a large variation to the provision of online booking services by Visitor Information Centres. Visitor Information Centres which were earlier adopters of online booking systems for accommodation have created a strong position in the booking market. However centres which are now considering adopting new online booking services will be faced with an extensive number of commercial competitors who have entered the market.

Consultation with Visitor Information Centres has highlighted that the cost of providing a booking service often outweighs the revenue generated from commissions and that the booking market is crowded by many well developed services such as wot-if.

Many smaller accommodation operators are still not linked to online booking agencies and have been slow adopters of technology. Many of these smaller operators are more reliant on referrals and booking services provided by Visitor Information Centres.

³ Ballantyne R, Hughes K, Ritchie B (2009) Meeting the Needs of Tourists: The Role and Function of Australian Visitor Information Centers, Journal of Travel and Tourism Marketing, Vol. 26 Issue 8, 2009.

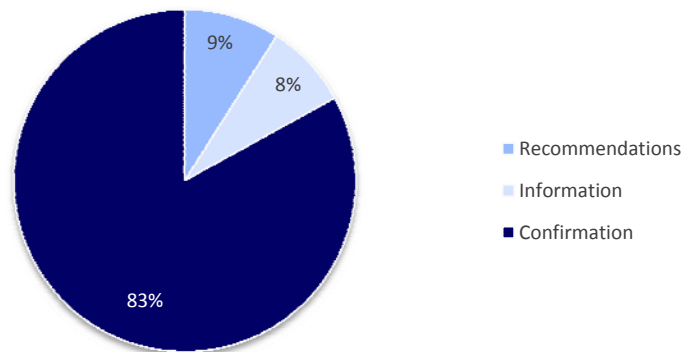
8.3. EXISTING CONDITIONS

8.3.1. INFORMATION SOUGHT

In 2012, a study was published by La Trobe University, analysing the questions asked at Visitor Information Centres at specific centres in NSW⁴. The study distinguished four categories, based on their level of specificity, ranging from the least specific to the most specific questions. They were as follows:

1. Enquiries regarding very general aspects of the destination or travel experience, and requesting generic information, e.g. "Do you have any information on the area?" or "Is Destination X worth stopping at?"
2. Enquiries related to one of three main tourism products: accommodation, restaurants and activities/attractions.
3. Enquiries about specific types of the three main tourism products e.g. B&Bs, camp sites, fast food and shopping centres.
4. Enquiries regarding a specific tourism business, identified by name or directions to get to a specific destination.

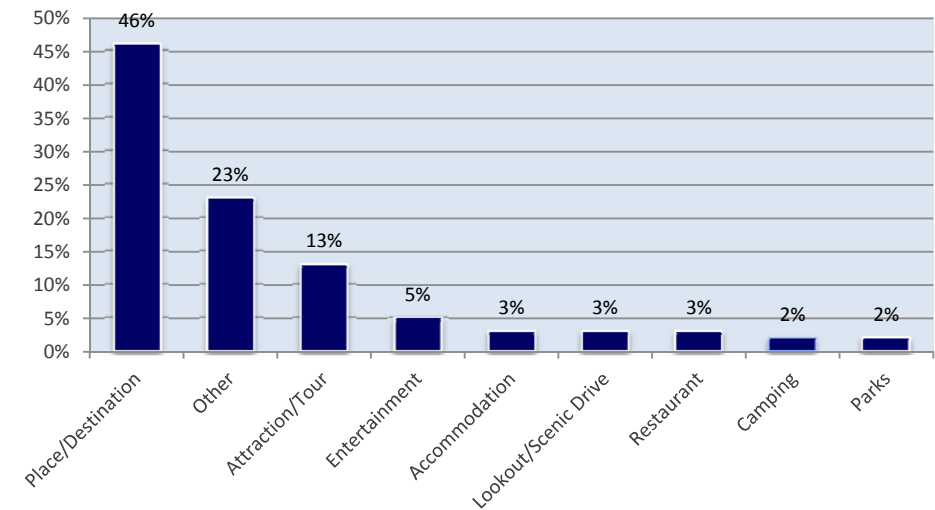
FIGURE 31 TYPE OF INFORMATION SOUGHT



Source: What Tourists Want to Know: An Analysis of Questions Asked at VICs, La Trobe University, 2012

⁴ What Tourists Want to Know: An Analysis of Questions Asked at VICs, La Trobe University, 2012

FIGURE 32 OBJECT OF ENQUIRY



Source: What Tourists Want to Know: An Analysis of Questions Asked at VICs, La Trobe University, 2012

Complementary to this study, The Journal of Travel & Tourism Marketing published an article in 2009 entitled *Meeting the Needs of Tourists: The Role and Function of Australian Visitor Information Centres*. The report was based on a survey of people visiting VICs across Victoria, Queensland, Western Australia and the Northern Territory. Some relevant findings are presented in the following table.

TABLE 4 MAIN REASONS FOR VISITING THE VIC

Main Reason for Visiting the VIC	This Town/City	This Region	Other Regions	Other States
General Information about	59%	56%	8%	2%
Specific Activities/Attractions in	52%	48%	6%	1%
Book Activities/Tours (if possible) in	22%	18%	3%	0%
Find out about Accommodation in	22%	16%	3%	1%
Book Accommodation (if possible) in	15%	9%	3%	5%
Use Facilities (e.g. restrooms)	30%	-	-	-
Have a Rest from Travelling	27%	-	-	-
Purchase Merchandise/Souvenirs	26%	-	-	-
Find Refreshments	18%	-	-	-

Source: Meeting the Needs of Tourists: The Role and Function of Australian Visitor Information Centres, Journal of Travel and Tourism Marketing, 2009

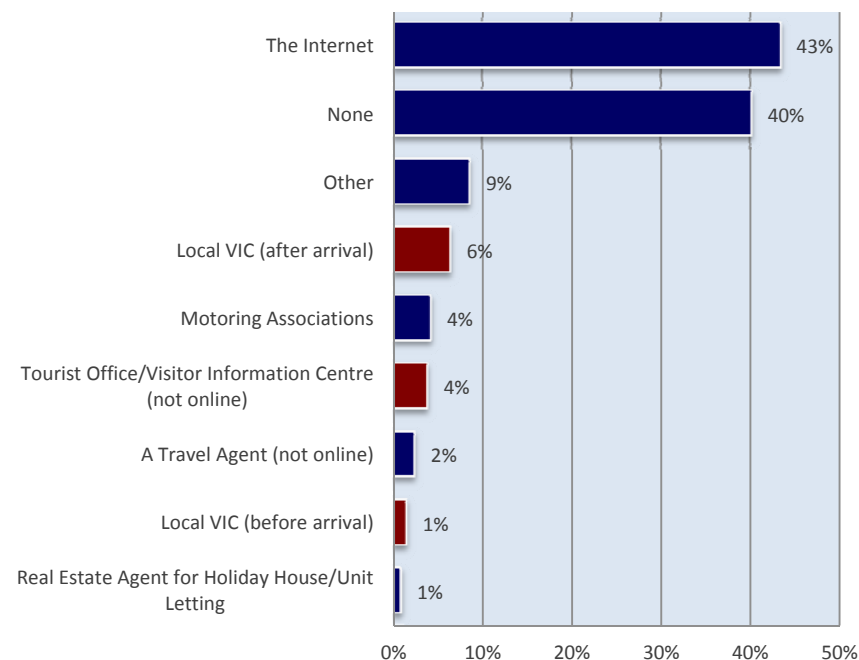
The data highlights the importance of a regional approach to the delivery of visitor information, with visitors generally seeking information at both the town and regional level. Visitor Information Centres which are focused only on Local Government Areas or Townships are not meeting visitor needs.

8.3.2. BOOKING SOURCE

6% of visitors surveyed reported they used a local Visitor Information Centre after arrival at the destination as a booking source. An additional 4% indicated they had used a Visitor Information Centre as a booking source and only 1% reported they had used a local VIC before arriving at their destination.

The internet is the primary source for booking accommodation. It is important to ensure that all accommodation in the region has an internet presence and can be booked directly online.

FIGURE 33 BOOKING SERVICES USED



Source: Tourism Research Australia, Visitor Profiles and Satisfaction Surveys. Compiled Urban Enterprise 2012.

8.4. CONSULTATION OUTCOMES

Most VICs within Victoria have some degree of accommodation, attraction and event booking service to meet the needs of their visitors. Many provide a manual, non-commission based referral service. In this case, suitable accommodation options are provided to the visitor and the visitor books themselves, or the VIC makes the booking by calling the operator to check for availability and then booking.

The motivations behind implementing an online reservation system vary between centres. Many have undertaken cost benefit analyses of implementing a booking system, however have chosen not to proceed due to the insignificant financial gains versus the resourcing output. Anecdotally, the VICs which have chosen to implement an automated booking system have done so principally to streamline the service they offer their visitors and operators as opposed to a revenue making venture. A walk in visitor can make a booking at the centre and when they leave they have the security that the accommodation/attraction or event has been booked and paid for. The booking is also streamlined for the operator who has a booking made on its behalf and the money deposited into its account. Furthermore, the inventory is online to be booked immediately without the need to necessarily contact the operator for confirmation of availability. Around one third of VICs in the State have implemented a booking system within their centre with most using the Bookeasy system.

Some centres such as Bendigo and the Mornington Peninsula have their reservations system well integrated with their destination website so visitors have the ability to book straight away instead of searching elsewhere to make their purchase. This ensures monies are retained by a local booking service and these can then be re-invested back into the industry.

Ballarat Regional Tourism (BRT) has recently implemented the JIBS (Jewel Integrated Booking System) which is a full content management system that sits within its destination website, visitballarat.com.au and is used by staff at the VIC. The system pulls all of the data from the Australian Tourism Data Warehouse (ATDW) and will soon have online bookable accommodation. They have acknowledged that although it may not provide substantial revenue, they see a need from the consumer for such a service to be offered at the VIC and online. Despite the plethora of online booking services available to the consumer, Ballarat Regional Tourism felt they needed to be active in the digital space

as a service for visitors to their site and as a service to their BRT member base. Another key consideration was the ability to offer online ticket sales for big events held within Ballarat and attraction passes.

9. ISSUES AND OPPORTUNITIES

9.1. INTRODUCTION

This section draws on the research and analysis in previous sections and the appendix documents. The issues and opportunities identified are addressed in the vision for the VIC network in 2022.

9.2. ISSUES

9.2.1. PROVISION OF VISITOR INFORMATION CENTRES

LOW CAPTURE OF VISITORS TO VICS IN THE MELBOURNE REGION

The Melbourne Region has the lowest ratio of VICs to visitor population of Victoria's regions. It also has the third lowest capture of total visitors to information centres in Victoria. This highlights that there is potentially a need for further provision of VICs in the Melbourne Region. Locations suggested include gateway centres at Melbourne Airport and potentially also at Southern Cross Station.

INEFFICIENT VISITOR INFORMATION CENTRES IN DAYLESFORD AND MACEDON RANGES REGION

The Daylesford and Macedon Ranges Region has a large number of accredited VICs and the third highest provision of VICs per head of visitor population in Victoria. However, the large provision of VICs has not translated into high rates of walk in visitors. This suggests that there are either too many VICs in the region or they are ineffective in meeting visitor needs, potentially due to location, design or marketing.

LOW LEVEL OF WALK IN VISITORS TO VICS IN REGIONS CLOSE TO MELBOURNE

The Yarra Valley and the Dandenongs and the Mornington Peninsula have the second and third lowest provision of VICs per head of visitor population of Victoria's regions. Correspondingly, they have the lowest number of walk in visitors to VICs of Victoria's regions. Whilst this may be somewhat attributed to the low number of Visitor Information Centres, Daylesford and Macedon Ranges, which has a high number of VICs also has low levels of walk in visitors.

Regions closer to metropolitan Melbourne (the largest market for tourism in regional Victoria) have difficulty in attracting visitors to visit their VICs, reasons for this include:

- High number of daytrip visitors and short length of stay;
- High proportion of visitors who are familiar with the region (either holiday home owners or visit frequently due to proximity); and
- Distributed product and numerous visitor nodes (visitors are often travelling to a specific business or attraction, such as a winery).

Alternative methods of visitor information provision should be considered for these regions, and potentially focus more on destination based information and the use of information technology. Furthermore, a review of the current location and provision of VICs may be necessary to ensure they are located best to service visitor populations.

9.2.2. RESOURCES AND MANAGEMENT

LITTLE OVERARCHING SUPPORT AND LEADERSHIP

Accredited VICs highlighted that they have little overarching support or leadership to assist with decision making. There is a requirement for further resources and leadership to be provided by accreditation authorities with regard to best practice in VICs.

REGIONAL APPROACH

Almost half of all information requested in VICs is for the surrounding region. However the vast majority of VICs are owned and operated by Local Government. In order to provide consistent messaging, accurate information and information linked to regional marketing messaging there is a strong argument that VICs should have much greater alignment to Regional Tourism Associations or Regional Tourism Boards or both. This would also allow for much greater economies of scale and resource efficiencies.

SIGNIFICANT RESOURCES REQUIRED TO FUND INFORMATION CENTRES

There are substantial resources required to fund VICs, with the average VIC in Victoria requiring \$206,393 of external funding per annum from a mix of Local Government, Regional/Local Tourism Organisations and other sponsors. Much of this goes towards funding of staff, administration and equipment. Before developing a Visitor Information Centre, Local Government, Local Tourism Associations and Regional Tourism Associations need to understand the large financial cost information centres can have on funding agencies. While the benefits often meet and exceed the costs of an information centre in strong and emerging destinations, decision making by funding agencies needs to have regard to this.

POOR ECONOMIES OF SCALE FOR SMALL VICs

The cost to provide information to a visitor to a VIC which attracts fewer than 35,000 visitors per year is three times that of VICs which attract more than 35,000 visitors. While satellite VICs which are linked to larger regional VICs may save costs in administration and overheads, small standalone VICs with no links to regional RTOs, little or no industry links and low levels of walk in visitation need further consideration in terms of cost versus benefit.

LIMITED FINANCIAL RESOURCES ARE ATTRIBUTED TO DIGITAL MEDIA

There are limited digital resources allocated to digital media and improvement of online information by VICs. Pooling finances across information centres at a regional level to develop online information and digital approaches to information should be considered.

9.2.3. VISITOR INFORMATION CONSUMPTION AND DEMAND

DECREASE IN WALK IN VISITORS

There has been a decrease in walk in visitors to Visitor VICs in Victoria, particularly over the past five years. The decline in walk in visitation correlates strongly with the use of the internet, but more importantly the use of smart phones which allow visitors to access information in region, and at any time.

It is likely that visitation will continue to decline with increased consumption of web based information, improvement to information available on smart phones, and with demographic change.

The strategies required to deal with this decline will include:

- Review of Visitor Information Centre networks to identify any over delivery or inefficient delivery of information;
- Broadening the role of information centres to include industry development, training, emergency services;
- Greater resources to be provided to digital media and information technology; and
- A review of the location of VICs to ensure it is positioned in a spot that maximises visitation and ensures strong economic flow on benefits to the community

9.2.4. DESIGN

POORLY DESIGNED LAYOUT AND INTERIOR OF VICS

Many VICS in the past 10-15 years have been designed as 'icons'. They are aesthetically pleasing and interesting; however in many cases the interior of the VIC has little regard to meeting the needs of the visitor and in providing an uncluttered and streamlined experience.

TECHNOLOGY IN VISITOR INFORMATION CENTRES

Many VICS are grappling with how to keep pace with technological innovation. While interactive touch screens would be desirable, it should be highlighted that visitors enter VICS predominantly for engagement by staff or volunteers. With the prevalence of smart phones and tablets it is not necessary for small VICS with limited resources to provide large interactive screens.

DIVERGENCE OF VIC DELIVERY MODELS

There has been a gradual divergence in VIC models in Victoria. Geelong Otway Tourism has shifted to a multi node approach to visitor information distribution using smaller VICS and a transportable VIC to bring information to where the visitors are, rather than attracting visitors to a VIC 'hub'. This approach may be in response to the difficulty in attracting walk in visitors to VICS that are in close proximity to Melbourne.

Large gateway Visitor Information Centres or VIC hubs work well in locations which are overnight destinations and more than 1.5 hours from Melbourne. An alternative method of information distribution needs to be considered for locations in close proximity to Melbourne.

9.2.5. LOCATION

MANY VICS ARE LOCATED WITHOUT FEASIBILITY STUDIES OR STRATEGIC PLANNING

A number of VICS have been developed and located in townships through the effort of community interest groups. Some of these VICS have very little relationship with industry which should be one of the core reasons for their development in the first place. In addition to this, there are numerous examples of VICS that have been developed to

'attract' tourism. VICS do not help attract visitors, they serve the tourism industry, their reason for being is to improve visitor experience, grow yield, create dispersal and increase length of stay.

GATEWAY LOCATIONS SHOULD NOT BE USED IN TOWNS WHICH HAVE NUMEROUS ACCESS POINTS

VICS located at the gateway to towns can often miss visitors entering from other directions and do not encourage high levels of incidental visitation due to people walking by. In-town VICS provide the opportunity for visitors to visit a VIC, shop and look around a town centre.

PARKING

In many cases when VICS are planned, parking is considered the most important factor for location, however there are several factors that need to be considered. Analysis of VIC visitation data indicates that many VICS that have a high level of walk in visitors have very limited parking provision. Parking is important but should not be the deciding factor location of a VIC.

RESISTANCE TO CHANGE

As many VICS have been developed in response to community calls for a visitor servicing hub, there is often strong resistance to change. This includes either closing a VIC or relocating a VIC to an alternative position. There are some regions identified in this report which may be over serviced by information centres, however streamlining the provision of information centres could be met with strong opposition.

9.2.6. TECHNOLOGY, INFORMATION AND BOOKINGS

MOST EXISTING APPROACHES TO WEBSITE DESIGN AND ONLINE INFORMATION PROVISION ARE DATED

Websites and applications which provide only static information are already dated, visitors will soon expect to have access to information that is far more tailored to their needs and that links location and visitors' own preferences with the information they are provided.

CROWDED WEB BASED BOOKINGS MARKET

There are numerous online providers of web-based bookings. For information centres which have had slow uptake of online booking systems, there is now very little room in the market. Visitor Information Centres that do not have online booking systems should consider how they can link to existing providers, rather than developing another system.

VOLUNTEER AND STAFF TRAINING IN INFORMATION TECHNOLOGY

As new technology is introduced within some centres, there will be a need to train staff and volunteers in the use of these new systems. This will inevitably affect staffing resources which will need to be taken into consideration.

9.3. OPPORTUNITIES

9.3.1. TECHNOLOGY

PROVISION OF WEB ACCESS

All VICs should consider providing Wi-Fi to allow visitors to access information on their smart phones and tablets. This negates the need for expensive interpretive screens, particularly for smaller VICs, and provides incentive for visitors to enter the VIC.

INTERACTIVE SCREENS

Larger and well-resourced VICs may consider implementing interactive screens to reduce the need for printed material and provide a much more streamlined information centre. This should link to one central content management system for all devices.

TAILORED INFORMATION

The greatest opportunity in the short term to medium term in relation to digital media is to develop information websites and applications that allow information to be tailored to the visitor's holiday preferences, timeframes and location. The delivery of this information can occur on a myriad of devices, either personal devices or larger screens at VICs.

SINGLE LOCATION FOR COLLECTION, STORAGE AND DISTRIBUTION OF INFORMATION

A single electronic location for the collection, storage and distribution of information is required in order to provide visitors with access to consistent information across computer terminals, smart phones and tablets. This single location for data needs to be shared across the state or even at the national level to ensure that all accreditation VICs can equally distribute current and correct information.

BOOKINGS

For VICs that do not have online booking capabilities, there is opportunity to link in with the large network of current providers, such as wotif or Stayz.

For the VICs who do not have an online booking system the application of a regional approach to bookings should be explored with the opportunity of utilising the services of a larger more well-resourced VIC in the region.

The resources required to run an online booking service for a small number of accommodation providers may be difficult to justify.

CONTENT MANAGEMENT SYSTEMS

It is very important that VICs transition to content management systems. With so many platforms now available and under development, it will be essential for VICs to move to one content management system that allows the management of online content more effectively and significantly reduces staff time.

9.3.2. VIC STRUCTURES

REGIONAL APPROACH

There is opportunity for greater collaboration and a regional approach to streamline Visitor Information Services delivery. There is great duplication of activities being undertaken by individual information centres which can be achieved with lower resource requirements if pooling of effort is achieved. A number of Regional Tourism Boards have commenced digital strategies as an example of regional collaboration, however there is opportunity for the following to be undertaken under one umbrella organisation for multiple VICs:

- Strategic planning;
- Research into visitors;
- Assessment of VIC effectiveness;
- Testing of marketing campaigns;
- Industry development;
- Booking services;
- Retail merchandising strategies;
- Online information collection, storage and distribution; and
- Digital strategies.

GATEWAY VISITOR INFORMATION CENTRES

The gateway and satellite approach to VICs provides the opportunity to deliver information services across a broader area, at high quality with consistent and streamlined information. This allows a gateway centre to provide the resources to support the smaller satellite locations. Bendigo and Mansfield provide examples of this.

PART B

VICTORIAN VIC

NETWORK VISION

2022

This section of the report provides a vision for the Victorian VIC network. The vision for Visitor Information Centres is aspirational and draws on best practice and trends in visitor information consumption and technological change. The vision statements provide a framework for decision makers to consider when investing, reviewing and improving visitor information services.

The vision draws on best practice in visitor information servicing and issues and opportunities identified throughout Part A of this report.

10. ROLE OF VICs

2022 Objective 1: VIC networks will broaden their roles and responsibilities beyond the provision of visitor information services to a hub servicing visitors, residents and industry

BACKGROUND

The current role of Visitor Information Centres is highlighted in the Victorian VICs Accreditation guidelines. They include:

- A Visitor Information Centre provides a **central location** (in a fixed building/structure) for visitors to gain access to **timely, accurate and impartial visitor information** and advice.
- The primary purpose of a Visitor Information Centre is to **enhance the visitor experience, encourage visitors to stay longer and undertake additional activities, exceed visitors' expectations and encourage visitors to return to the region.**
- A Visitor Information Centre delivers the above by sharing its passion and providing **quality and accurate information, by providing exceptional customer service and effectively promoting the range of visitor experiences and services available.**
- A Visitor Information Centre **supports local businesses and tourism operators within a region.** Many local business and tourism operators are reliant on the services of the Visitor Information Centre to provide additional business and ensure a high standard of visitor servicing in the area.

The current role of VICs is predominantly focused towards visitors and supporting tourism businesses. However the accreditation guidelines do not provide any criteria which

assess how well businesses are engaged or benchmarks for how VICs are improving visitor experience.

Walk in visitors to VICs have declined by 2.1% per annum over the period 2009-2011 and is likely to continue to decline in the near future with the growth of digital information.

Throughout the course of this research, Urban Enterprise has identified that well-resourced VICs are playing a much broader role in tourism than required by the accreditation standards. Many leading VICs provide the following services:

- Accurate, timely emergency information to visitors and residents;
- An avenue to collect information on visitors to a region to test marketing programs;
- Tourism business mentoring and education, including workshops on packaging information, digital media, booking services;
- Greater focus on visitor servicing: moving beyond information to improving visitor experience in a region;
- Inform and engage with residents, building an understanding of tourism in the community and strengthening VFR markets;
- Information relating to resident and industry attraction; and
- A hub for the tourism industry.

ACTIONS TO ACHIEVE 2022 VISION ROLE OF VICs

Action 1 Review the current accreditation guidelines with respect to broadening the role of VIC networks.

VIC networks will perform a growing role in destination management. In particular, VIC networks will broaden their roles and responsibilities beyond the provision of visitor information to also providing services to residents and industry. The roles and responsibilities provided by VIC networks in 2022 should include:

- Information delivery and management;
- Emergency information to visitors and residents;
- Collection of visitor data;

- Provision of mentorship and education to tourism businesses;
- Informing and engaging with residents, building an understanding of tourism in the community and strengthening VFR markets; and
- Provide a hub for the tourism industry.

Action 2 Set performance indicators for assessing VICs' delivery of customer service and business services.

Performance criteria for VICs need to be developed to understand how well VICs are performing in relation to their roles and objectives.

Key performance criteria may include:

- Assessing the overall economic impact of a VIC (including length of stay and increases in visitor expenditure), measured through visitor surveys;
- Visitor satisfaction with services, measured through surveys;
- Business satisfaction with services and experience, measured through a survey of businesses;
- Number of visitors serviced;
- Currency of information provided; and
- Presentation of VIC.

11. LEADERSHIP

2022 Objective 2: A VIC network that has strong leadership from all levels of Government and Tourism Organisations

BACKGROUND

Consultation with accredited VIC managers highlighted that VICs in Victoria would benefit from increased support or leadership to assist with decision making. There is a requirement for further resources and leadership to be provided by overarching authorities with regard to best practice in VICs. Areas identified by VICs Centres where more leadership would assist in improving visitor services within the network include:

- Ongoing research into information consumption and information needs;
- Guidelines for VIC decision making, including investment, location and design;
- Guidance in relation to best practice and emerging technology; and
- Guidance relating to the developing role of VICs.

Greater leadership at the National, State, Regional and Local level would see decision makers better informed in relation to providing visitor information services effectively.

ACTIONS TO ACHIEVE 2022 VISION: LEADERSHIP

Action 3 Victorian RTOs to take leadership in their respective regions in relation to digital media and research where appropriate

Many VICs are finding it difficult to progress visitor information services through digital technology. The cost, lack of technologically proficient staff and restricted Local Government IT policy provide barriers to progressing digital media at the local level. There is opportunity for RTOs/RTBs to take leadership in this area and a number of Victorian RTBs are already taking a proactive approach to this.

Action 4 Establishment of a national body which sets policy, identifies best practice and aims to achieve consistency across the Australian States and Territories with regards to accreditation and delivery.

New Zealand provides a strong example of national leadership in the provision of visitor information services. The national approach ensures that there is strong and consistent messaging, accurate information across online websites and through physical delivery of VICs. All States and Territories are grappling with the same issues in relation to provision of information services such as digital information delivery, sustainability of accredited VICs and best practice in design and layout. Rather than continuing to duplicate research, guidelines, and accreditation resources at the state level, a national body could coordinate efforts from each state to provide strong leadership for VICs in Australia.

Action 5 Research into the awareness of the italic /is undertaken to determine an appropriate response to marketing and brand awareness of accredited VICs.

Research shows that consumer awareness of the italic i is very low, and that most visitors do not understand the difference between the standard white i and the accredited italic i. This research should be updated to determine the requirement for marketing and brand development of the accredited i.

Action 6 Leadership to be provided in ongoing research and monitoring of VICs.

Given the extensive resources that are attributed to Visitor Information Centres, there is very little information gathered about VIC consumers. Coordinated research programs at

the national and state level are essential for understanding demand for services. Research approaches should consider in-centre consumer surveys coordinated across the network to assess economic impact and visitor experience.

Action 7 Ongoing management and review of Visitor Information Services by Local Government to ensure that delivery meets best practice and visitor needs

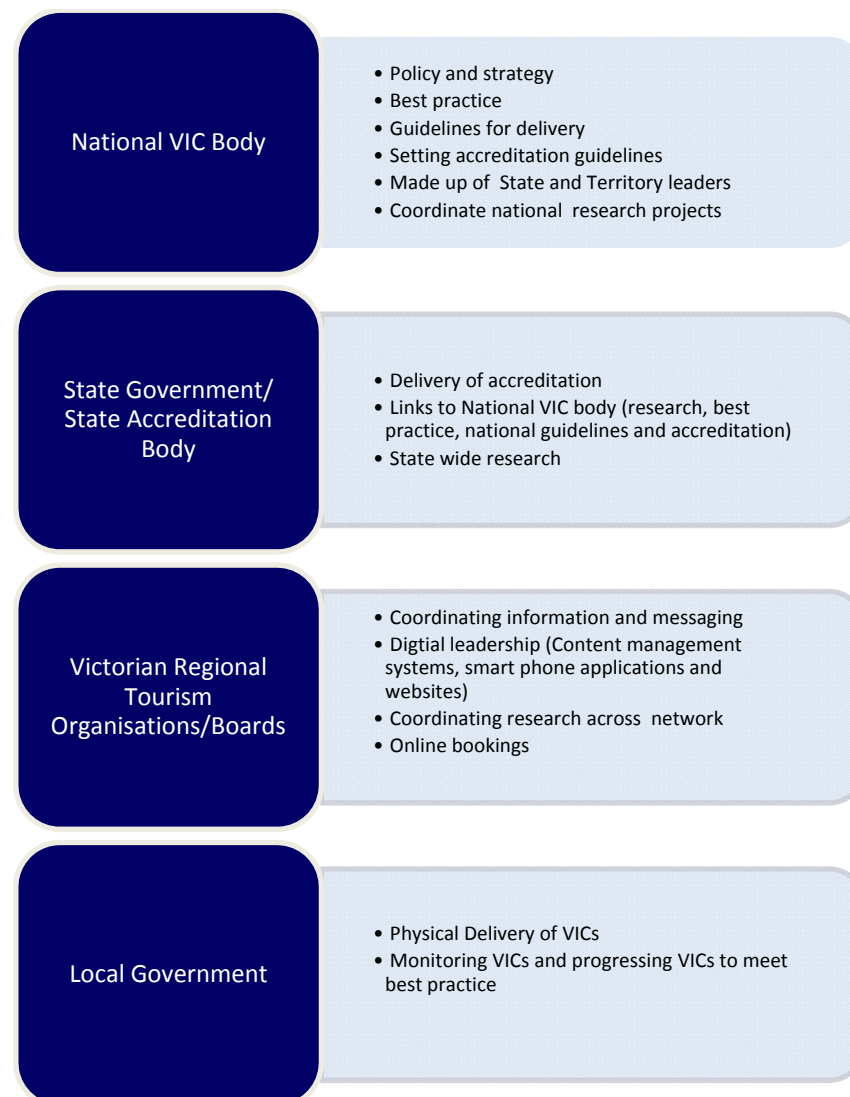
85% of Visitor Information Centres are owned by Local Government and 83% of VICs are managed by Local Government. In total, Local Government in Victoria spends in the vicinity of \$15 million per annum on the VIC network. However there are many instances where little additional resources are provided to review their investment in terms of whether it meets best practice and the visitor's needs.

APPROACH TO FUTURE LEADERSHIP

The following chart provides an indication of future leadership for VICs in Victoria. The chart is provided as an example of a tiered approach where stronger leadership is provided at all levels of government.

There will be some crossover of services between tiers and there is much variance in the delivery of VICs. This chart provides an example of how leadership may be approached in a general sense.

FIGURE 34 INDICATIVE FUTURE LEADERSHIP/ VIC ORGANISATION MATRIX



12. MANAGEMENT AND ADMINISTRATION

2022 Objective 3: Transition to a regional networked approach of gateway and satellite visitor information delivery

BACKGROUND

Research shows that almost half of all information requested in VICs is for the surrounding region. However the vast majority of VICs are owned and operated by Local Government.

The Gateway and Satellite approach to VICs provides the opportunity to deliver information services across a broader area which provides high quality services, consistent and streamlined information. This allows gateway centres to provide the resources to support the smaller satellite locations. Bendigo and Mansfield provide examples of regional approaches.

A regional approach to visitor information delivery will be different for each region in Victoria. In some cases, an RTO is well placed to take leadership in this area, in other instances it might be a collection of Local Governments collaborating together. The overall aim however will be to get consistency in visitor information services across a destination and draw on the leadership that may be provided by a gateway or hub VIC.

This approach will provide the following benefits:

- Allow for consistency in messaging across a regional destination;
- Greater economies of scale in VICs collaborating together;

- Allows for leadership to be provided from the well-resourced VICs; and
- Allows VICs with low resources to transition and keep up with best practice by collaborating with well-resourced VICs.

ACTIONS TO ACHIEVE 2022 VISION: LEADERSHIP

Action 8 **Regional VIC networks should be reviewed to understand opportunities for collaboration and resource sharing**

Information centres which do not have links to a broader regional network need to be reviewed. There are significant economies of scale that can be achieved within a network working collaboratively.

Action 9 **VICs should develop strong links with industry**

One of the core functions for VICs is to provide benefits to local business. All VICs should have strong links with industry. There is opportunity for VICs to be the conduit between Regional Tourism Organisations and industry.

Action 10 **Investigate opportunities to transition VICs to operate under a collaborative regional network, examples of this may include:**

- A number of smaller VICs and a gateway VIC establishing a cooperative agreement;
- A number of Local Government Areas which form a tourism destination establish a cooperative agreement;
- An RTO to operate a number of VICs under one umbrella organisation; and
- An RTO to provide a VIC coordinator which promotes cooperation, collaboration and sharing of resources.

There are many examples of VICs which operate under an RTO. This provides strong links with regional marketing and industry. Examples of effective operation of VICs under an RTO umbrella include Mansfield-Mt Buller, Mornington Peninsula Tourism and Geelong Otway Tourism. This approach allows sharing of resources and development of Gateway-Satellite approach to VICs. This approach discourages parochialism and improves regional provision of information.

The approach for each region is likely to be different, in some instances it may be under an RTO structure or in others collaboration of several Local Governments.

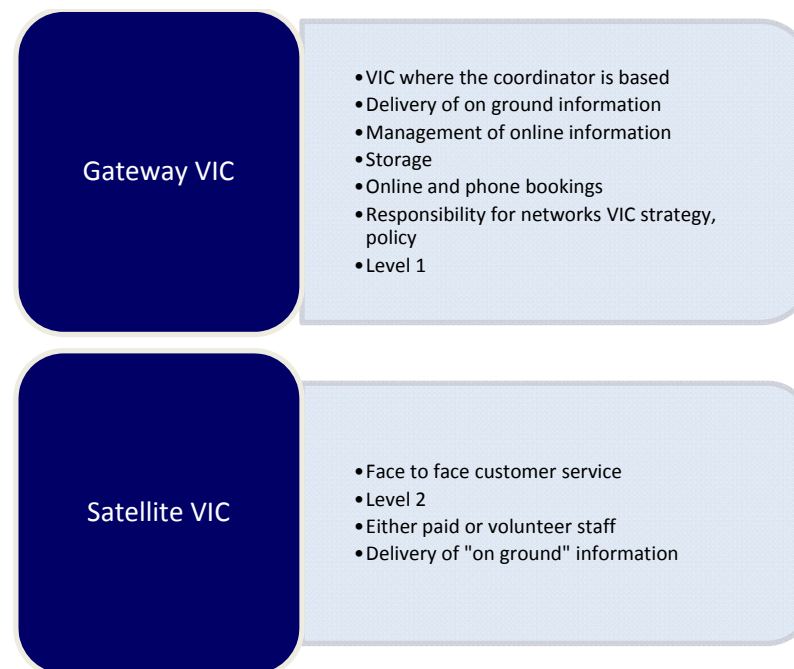
Action 11 Investigate how accreditation can be modified to provide greater incentives for networks which use a regional Gateway-Satellite approach.

The Victorian accreditation guidelines consider this approach and make allowances for VICs that are satellites to a gateway VIC with regard to staffing. There may be opportunity to make further concessions in this area, such as flexible hours for satellite VICs, further reduction in paid staff requirements and accreditation for temporary VICs. The accreditation guidelines should be modified to provide separate criteria for Gateway and Satellite VICs, providing that Satellite VICs are linked through management to a Gateway Centre.

APPROACH TO GATEWAY AND SATELLITE VIC NETWORK

The following provides an example of how gateway VICs can provide a range of services that may not need to be duplicated by smaller satellite VICs in a region

FIGURE 35 GATEWAY AND SATELLITE APPROACH TO REGIONAL VIC DELIVERY



13. PROVISION

2022 Objective 4: Resources for Visitor Information Centres and Services will be tailored to meet visitor need

BACKGROUND

There are substantial resources required to fund VICs, with the average VIC in Victoria requiring \$206,393 of external funding per annum from a mix of Local Government, Regional/Local Tourism Organisations and other sponsors. Much of this goes towards funding of staff, administration and equipment. Before developing a VIC, Local Government, Local Tourism Associations and Regional Tourism Associations need to understand the financial cost information centres can have on funding agencies. While the benefits often meet and exceed the cost of operating information centres in strong and emerging tourism destinations, decision making by funding agencies needs to have regard to this.

The cost per walk in visitor to a VIC which attracts less than 35,000 visitors per year is three times that of VICs which attract more than 35,000 visitors. While satellite VICs which are linked to a larger regional VICs may save costs in administration and overheads, small standalone VICs with no links to regional tourism networks, little or no industry links and low levels of walk in visitation need further consideration in terms of cost versus benefit.

ACTIONS TO ACHIEVE 2022 VISION: LEADERSHIP

Action 12 Assessment of the performance and approach of delivering visitor information services

Each tourism region in Victoria needs to be reviewed with regard to the provision of visitor information services to ensure that resources dedicated to VICs are being directed to visitor need.

General trends to understand from the research are:

- Regions closer to Melbourne (Yarra Valley and Dandenongs, Mornington Peninsula, Geelong Region, Daylesford and Macedon Ranges) have lower levels of walk in visitors. Alternative methods of visitor information provision should be considered for these regions, and potentially focus more on destination based information and the use of information technology.
- Larger regions further from Melbourne such as The Murray, High Country and Great Ocean Road have high levels of VIC visitation. This is due to higher levels of overnight visit and the structure of tourism product around larger regional centres and tourism destinations.
- The Melbourne Region has a very low capture of walk in visitors due to low provision of VICs compared to visitation. Provision of a gateway airport VIC should be considered.

Assessment of the performance and provision of visitor information services at the regional level should have regard to:

- How well each region's VICs are networked and linked;
- Areas where over provision occurs;
- Identification of underperforming VICs;
- Alternative methods of information distribution; and
- Digital strategy.

Action 13 Further resources to be allocated to provision of digital information services

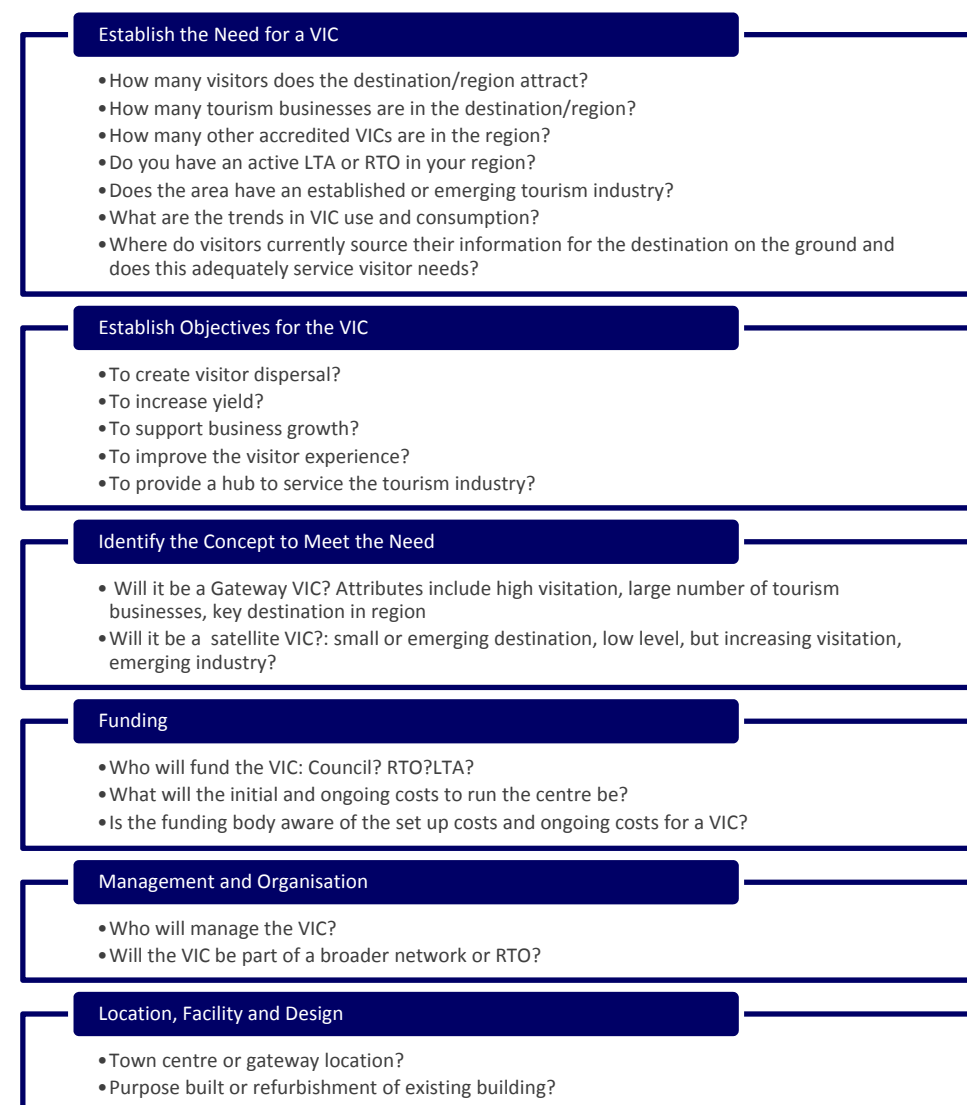
Action 14 IT proficient staff are engaged at hub or satellite centres to lead digital information delivery.

Online information is the most used information source by visitors, however the resources allocated to digital information by VICs is very low when compared to physical services. Pooling finances across information centres at a regional level to develop online information and digital approaches to information should be considered. In some cases resources may need to be redirected from physical services to digital information services.

Action 15 Develop a set of decision making criteria for VIC establishment.

The following figure provides a set of questions which should be considered prior to establishing a VIC. This should be further developed to allow self-assessment criteria for decision makers.

FIGURE 36 CONSIDERATIONS FOR ESTABLISHING A VIC



14. VIC DESIGN

2022 Objective 5: The Design of VICs will embrace emerging digital technology and focus on providing uncluttered, and streamlined visitor friendly spaces

BACKGROUND

Many purpose built VICs in the past 10-15 years have been designed as 'iconic' structures. They are aesthetically pleasing and interesting; however in many cases the interior of the VIC has little regard to meeting the needs of the visitor and in providing an uncluttered and streamlined experience.

Many VICs are grappling with how to keep pace with technological innovation. While interactive touch screens would be desirable, it should be highlighted that visitors enter Visitor Information Centres predominantly for engagement with VIC staff or volunteers; this is confirmed by research which highlights that 97% of VIC patrons prefer to speak to a person than use a portal. With the prevalence of smart phones and tablets, it is not necessary for small VICs with limited resources to provide large interactive screens.

ACTIONS TO ACHIEVE 2022 VISION: VIC DESIGN

Action 16 Standard guidelines for the interior look and feel of VICs should be developed to ensure the visitor is provided with a consistent approach across the VIC network.

Standard guidelines should be developed for the interior layout of a VIC in consultation with experienced VIC managers and retail architects. This will provide VIC designers with a clear understanding of how to meet visitor needs.

Action 17 Transition to removing excessive collateral is undertaken, utilising digital information where possible.

Larger and well-resourced VICs should consider implementing interactive screens to reduce the need for printed material and provide a much more streamlined information centre. This should link to one central content management system for all devices. Launceston VIC provides a recent example of a VIC which has embraced digital media in a cost effective and efficient way.

It is not expected that smaller and lower resourced VICs be investing in expensive digital screens, however their content should be kept up to date on websites and applications for the region.

15. TECHNOLOGY

2022 Objective 6: Digital information delivery is embraced by VIC networks

BACKGROUND

There are limited resources provided to VICs to develop effective approaches to providing digital information accessible on the numerous internet enabled devices. There is a need to approach digital information provision at the regional level, to ensure a consistent approach is achieved and that resources are not wasted on development of technology that will become quickly out-dated or expensive to maintain.

ACTIONS FOR CONSIDERATION TO ACHIEVE 2022 VISION: TECHNOLOGY

Action 18 Digital information delivery strategies to be prepared for of Victoria's regions where necessary and appropriate.

Action 19 All information centres to provide Wi-Fi

All VICs should consider providing Wi-Fi as means to allow visitors to access information on their smart phones and tablets. This negates the need for expensive interpretive screens, particularly for smaller VICs.

Action 20 Information provided on websites becomes "smarter" and tailored to the user

The greatest opportunity in the short term to medium term in relation to digital media is to develop information websites and applications that allow information to be tailored to the visitor's holiday preferences, timeframes and location. The delivery of this information can occur on a myriad of devices, either personal devices or larger screens at VICs.

Action 21 Content management systems are used in all Visitor Information Centres.

A single location for the collection, storage and distribution of information is required in order to provide visitors with access to consistent information across, computer terminals, smart phones and tablets. This single location for data needs to be shared across the state or even at the national level to ensure that all accredited Visitor Information Centres can equally distribute current and correct information.

It is important that VICs transition to content management systems. With so many platforms now available and under development, it will be essential for VICs to move to one content management system that allows the management of online content more effectively and significantly reduces staff time.

16. ACTION PLAN

CATEGORY	2022 VISION STATEMENTS	ACTIONS	RESPONSIBILITY
Role of the VIC Network	VIC networks will broaden their roles and responsibilities beyond the provision of visitor information services to a hub servicing visitors, residents and industry	Action 1 Review the current accreditation guidelines with respect to broadening the role of VIC networks.	ATAP, Tourism Victoria
		Action 2 Set performance indicators for assessing VICs' delivery of customer service and business services	New National Body, VIC Reference Group
Leadership	A VIC network that has strong leadership and support from all levels of Government and Tourism Organisations	Action 3 Ongoing management and review of Visitor Information Services by Local Government to ensure that delivery meets best practice and visitor needs	Local Government
		Action 4 Establishment of a national body which sets policy, identifies best practice and aims to achieve consistency across the Australian states and territories with regards to accreditation and delivery.	State Tourism Organisations
		Action 5 Research into visitor awareness of the italic "i"	ATAP/ Tourism Victoria
		Action 6 Leadership to be provided in ongoing research and monitoring of VICs.	State Government, VTIC, New National Body
		Action 7 Regional approach to delivery of digital services	VIC networks, LGAs, Regional Tourism Associations, Regional Tourism Boards

Management and Administration	Transition to a regional networked approach of gateway and satellite visitor information delivery	Action 8 Investigate how accreditation can be modified to provide greater incentives for networks which use a regional Gateway-Satellite approach.	ATAP, Tourism Victoria
		Action 9 VICs should develop strong links with industry	VICs/ Local Government/RTOs/Industry
		Action 10 Investigate opportunities to transition VICs to operate under a collaborative regional network	Local Government/ RTOs/RTBs
		Action 11 Regional VIC networks should be reviewed to understand opportunities for collaboration and resource sharing	Local Government/ RTOs/RTBs
Provision	Resources for Visitor Information Centres and Services will be tailored to meet visitor consumption and need	Action 12 Develop a set of decision making criteria for VIC establishment.	New National Body
		Action 13 Further resources to be allocated to provision of digital information services	RTBs/ RTOs/ Local Government
		Action 14 IT proficient staff are engaged at hub or satellite centres to lead digital information delivery.	Gateway VICs
		Action 15 Assessment of the performance and approach of delivering visitor information services	Local Government/ Regional Tourism Organisations
VIC Design	The design of VICs will embrace emerging digital technology and focus on providing uncluttered, streamlined and visitor friendly spaces	Action 16 Standard guidelines for the interior look and feel of VICs should be developed to ensure the visitor is provided with a consistent approach across the VIC network.	New National Body
		Action 17 Transition to removing excessive collateral is undertaken, with a focus on digital information services.	VICs

Technology	Digital information delivery is embraced by VICs	Action 18 Content management systems are used in all VICs	VIC networks
		Action 19 Information provided on websites becomes "smarter" and tailored to the user	VIC networks/ RTOs/ State Government
		Action 20 Digital information delivery strategies to be prepared for of Victoria's regions where necessary and appropriate	RTBs
		Action 21 All VICs provide Wi-Fi	VIC networks, Local Government
Recommendations to address existing research gaps	<ul style="list-style-type: none"> • VIC customer research. A bi annual survey coordinated across Australia at VICs which targets existing VIC users. This research will collect information on satisfaction, economic impact and information needs. • Visitor use of information. The National and International Visitor Surveys only collect data on information used prior to visit. The questions should be reviewed to reflect current trends in consumption during trip, and also the various digital information sources utilised. • i Brand awareness research. New research is required into the awareness of the accredited "i" amongst travellers. This research should be developed to identify any marketing or brand development strategies required for the italic "i". • Ongoing VIC Benchmarking Survey. An annual survey of VICs across Australia should be conducted, similar to the research conducted by IER for the VIC Future project. This includes gathering information on funding, expenditure, staffing, VIC size and ownership. This will provide trends on VIC performance and management over time and allow for improved decision making by VICs 		State Government, VTIC, New National Body

Part C

Appendices

Appendix A REVIEW OF RELEVANT LITERATURE

REPORT: *Accredited Visitor Information Centre Case Studies Insights into their Valuable Contribution to tourism and Communities*

PREPARED BY: *Tourism Queensland's industry innovation team, October 2012*

The Accredited Visitor Information Centre Case Studies report showcases a number of accredited VIC case studies, including eight VICs from Queensland and three from other states. The VIC case studies are listed below:

- Charleville Cosmos Centre and VIC (Qld)
- Gladstone VIC (Qld)
- Ipswich VIC (Qld)
- Julia Creek VIC (Qld)
- Mission Beach VIC (Qld)
- Moreton Bay VIC (Qld)
- Toowoomba VIC (Qld)
- Tyto Wetlands VIC (Qld)
- Bendigo Visitor Centre (Vic)
- Lismore VIC (N.S.W)
- Swan Valley Visitor Centre (W.A)

The report identifies accredited VICs that are effectively contributing to tourism and communities and their strategic approaches.

The report identifies some standout aspects of VICs that are important for success:

- Build positive working relationships with the tourism industry, RTOs, Council, civic leaders, industry and the wider community;
- Partner with local businesses and organisations;

- Provide staff and volunteers with appropriate training needed to maintain a high level of customer service, and keep them up to date with new and innovative technology;
- Engage with the local community;
- Establish a comprehensive distribution channel to market the facility;
- Pursue all avenues of funding opportunities;
- Deliver value added services;
- Communicate the benefits for the broader business sector and the community;
- Don't underestimate the power of an actual person assisting a visitor;
- Understand how best to use multimedia communication channels including SMS and social media;
- Have a crisis management plan, and understand the role the VIC can play;
- Allocate floor and wall space to local products, produce and merchandise to encourage community 'buy in' to the centre;
- Think and operate like a commercial business, whilst being owned and administered by Local Government;
- Ensure the centres web presence and use of other communication channels reflect the VICs strong service culture and value system
- Maintain a strong, unified, creative and motivated volunteer team
- Establish a strong reporting regime to ensure all stakeholders are aware of the VICs performance;
- Communicate the successes to all stakeholders; and
- Continue to find ways to integrate technology into the delivery of information.

Specific relevant successful operating activities will be referenced as best practice examples throughout this report.

REPORT: *Destination Visitor Survey South Australia: The impacts of Regional Visitor Information Centres on Visitor Behaviour in South Australia*

PREPARED BY: *Greenhill Research and Planning, September 2011*

This report is the result of a research project conducted on behalf of the Department of Resources, Energy and Tourism to investigate the impact of VICs in three regional areas of South Australia: Gawler, Murray Bridge and McLaren Vale.

This report is relevant for its qualitative findings on visitor's experiences at South Australian VICs. The information obtained is specific to three VICs in South Australia; therefore the information can only be used sparingly. Some of the key findings include, but not limited to:

- Overall, half of VIC patrons were from interstate or overseas;
- The majority of respondents who spoke to VIC staff were looking for general tourism information (71%);
- 25% were interested in potentially bookable product (accommodation, day tours or other tourism product);
- 5% of those that made a booking enquiry booked product at a VIC;
- Most frequently booked product included transport and accommodation;
- 88% of patrons had sourced some information from a VIC;
- 83% had participated in additional activities, as a result of visiting a VIC;
- 72% had increased the duration of their stay, as a result of visiting a VIC;
- 22% spent additional nights in the area, as a result of visiting a VIC;
- 27% stayed overnight elsewhere in S.A, as a result of visiting a VIC;
- 59% stated that the additional activities or time resulting from their visit to a VIC had also resulted in additional expenditure that they hadn't planned prior to visiting the VIC;
- Less than 10% of those interviewed had used the touch screen information portals; and

- 97% stated that they would prefer to speak to a person rather than use a portal.

REPORT: *Visitor Satisfaction Study: Tourist, Services and Direction Signing*

PREPARED BY: *Millward Brown, May 2000*

This report brings to light the effectiveness of the VIC signage and tourists familiarity with the VIC accreditation brand in Victoria. Some relevant points from the report for our study include:

- 77% of respondents were aware of Visitor Information Signs;
- VIC signs were most remembered for their background colour (63%);
- Most respondents were clearly associating VIC signage with the white on blue symbol (62%), 30% were familiar with the yellow on blue Visitor Information Centre Signs;
- 12% who had noticed both white "i" and blue "i" symbols, 80% did not know a reason for having these two signage systems; and
- Most visitors to VICs received brochures (82%) or verbal advice (56%).

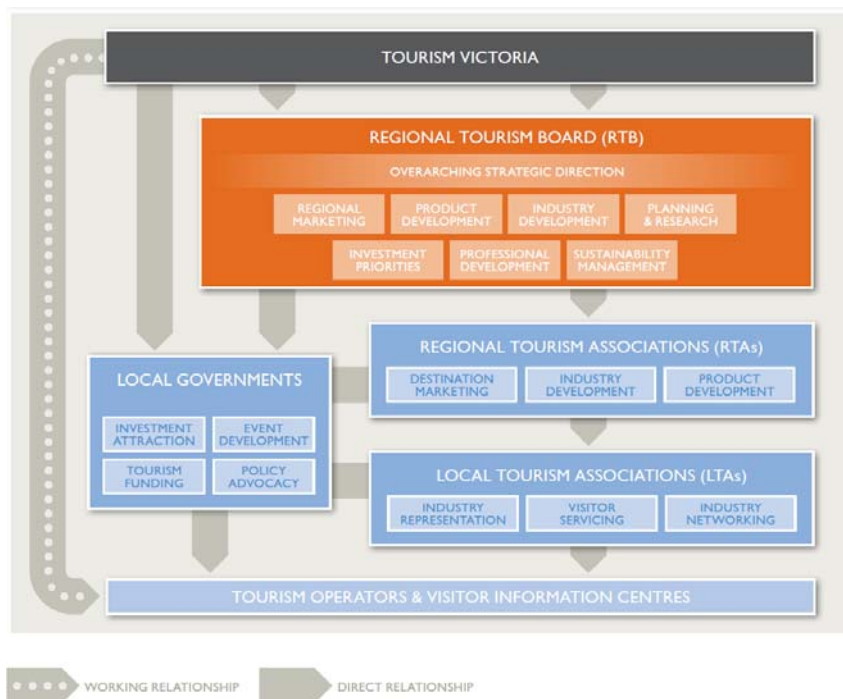
REPORT: *Regional Tourism Action Plan 2009-2012*

PREPARED BY: *Tourism Victoria, 2009*

The Regional Tourism Action Plan (RTAP) 2009-2012 was prepared to improve yield and dispersal of tourists across Regional Victoria. The relevant section to this study is the regional industry structure.

Visitor Information Centres have been placed at the bottom of the hierarchy, having a direct relationship with Local Tourism Associations (LTAs) and Local Governments, whilst maintaining a working relationship with Tourism Victoria.

The diagram below (from RTAP) illustrates how the flow of information should always lead to Tourism Operators and Visitor Information Centres; this is to ensure the flow of information on to the customer.



Source: Regional Tourism Action Plan 2009-2012, p. 13

REPORT: *Victoria's China Tourism Strategy*

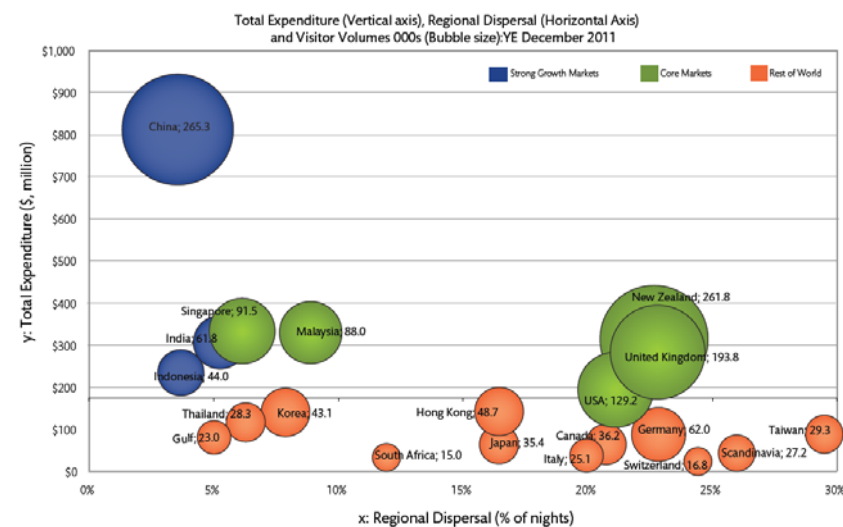
PREPARED BY: *Tourism Victoria, May 2012*

This report identifies the importance of Chinese tourism to Victoria and identifies measures to handle and promote the growth in Chinese visitation in the future. Making Chinese visitors feel welcome is pivotal to enhancing the visitor experience. The report identifies some basic level actions that should take place; they include, but should not be limited to:

- Providing better Chinese signage and information and more Chinese-speaking staff at VICs and tourism attractions in Melbourne and regional Victoria;

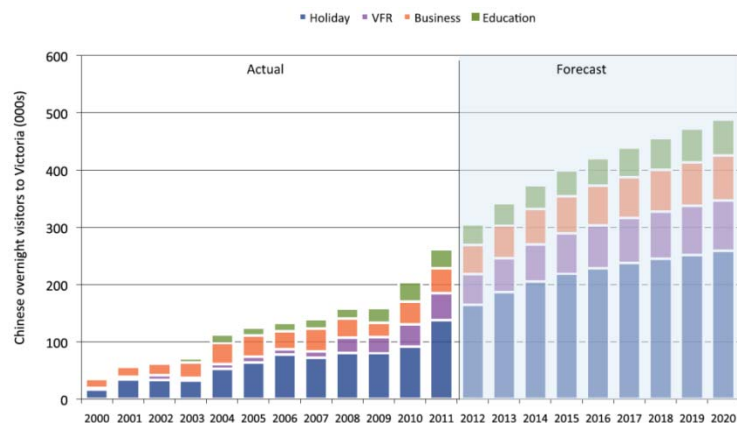
- Increase the number of Chinese speaking staff at key tourist attractions and Visitor Information Centres; and
- Improve the availability of Chinese language resources in regional Victoria

FIGURE 37 INTERNATIONAL OVERNIGHT VISITORS TO VICTORIA – MARKET VOLUME, EXPENDITURE AND REGIONAL DISPERSAL



Source: Victoria's China Tourism Strategy 2012, p. 7

FIGURE 38 GROWTH IN CHINESE VISITORS TO VICTORIA BY PURPOSE OF VISIT AND FORECASTS TO 2020



Source: Victoria's China Tourism Strategy 2012, p. 16

FIGURE 39 TOTAL INTERNATIONAL AND CHINESE VISITORS TO VICTORIA'S REGIONAL ATTRACTIONS



Source: Victoria's China Tourism Strategy 2012, p. 25

REPORT: *Tourism Victoria Annual Report, 2011-2012*

PREPARED BY: *Tourism Victoria, 2012*

Relevant points for consideration from the 2011-2012 Tourism Victoria Annual Report, in relation to our study include:

- Following the 2009 bushfires, Tourism Victoria worked with the Department of Justice and the fire agencies to build the tourism industry's capacity to effectively deliver bushfire messages to visitors. In 2011-2012, bushfire information displays were installed in accredited Visitor Information Centres located in high-risk areas, briefings were conducted at the Regional Visitor Information Centre Network meetings and each centre received a bushfire communications manual

REPORT: *Visitor Information Centres - Best Practice in Information Dissemination*

PREPARED BY: *Sustainable Tourism CRC, 2007*

The following information has been very selectively chosen, and is only used as a headline source of information to set an historical context around information flows in VICs. The relevant findings to this study include, but are not limited to:

- The predominant method of information delivery is by face-to-face contact with staff of the VIC;
- The most common strategies for internal information management practiced by VICs were those outlined as operational requirements within accreditation documentation. These processes focus on internal communication of information from suppliers to VIC staff and volunteers, to enable the information to be passed on to the consumer;
- Internal communication tools include regular staff meetings, staff newsletters, staff notice boards, diaries kept at front desk and regular familiarisation visits to local tourism operators;
- Tourism operators pass on information to VICs by way of brochures, personal contact, familiarisation visits from VIC staff and, where applicable, the use of electronic booking systems. The personal contact component is both

structured and sporadic, with some VICs actively involved in their local industry association allowing for networking opportunities;

- The study revealed that the most important aspect of communication of supplier information to consumers was through face-to-face interaction. Other tools included; visitor notice boards, brochures, electronic touch screens, internet access, looped audio-visual presentations and static interpretive displays;
- Only recently built VICs at the time tended to incorporate more advanced technologic tools; and
- The predominant types of information exchanges included; transport schedules, rates and prices, product availability, bookings and product descriptions (directional information/opening hours).

Human Resource Characteristics

- Volunteers enable a high level of interaction and local knowledge which is highly sought after;
- Some volunteer skills in terms of customer service often weakened the information exchange process;
- Volunteers more than paid staff had a resistance to procedural change; and
- Fear of technology taking people's jobs, both paid staff and volunteers.

Existing Technology

- The occurrence of technology within VICs was associated with the age of the VIC;
- Existing older VICs often faced barriers in the introduction of technology; and
- Value for money judgment when it comes to deciding on appropriate technologies for VICs.

Accreditation

- Generally, accreditation for VICs was viewed as a positive factor for the information exchange process;

- VIC accreditation documentation often used as a VIC operations guide.

Financial

- Financial considerations could be overcome if an expense could be justified and proven to contribute to the improvement of services within the VIC;
- The most significant factor was the variance in funding and management structures amongst VICs.

Networking

- Networking and sharing of information between VICs was valued and gave VICs an opportunity to improve quality of services.

REPORT: *Visitor Servicing, Inspiring Visitors and Locals*

PREPARED BY *Aurora Research and Development, 2012*

Aurora Research completed a major tourism research project - the Regional Visitor Servicing Strategy for Northern Rivers, N.S.W.

Some of the key findings relevant to this study are as follows:

'Bricks and Clicks':

- Incorporates traditional visitor information though VICs where face to face contact with visitors occurs, as well as the delivery of information through digital media managed by the VIC
- 24 hour visitor information is provided by information bollards, using static and interactive platforms, mobile i-van, new signage, i-plinths and a loyalty rewards program.
- Mobile applications that a visitor can download from the VIC with their digital brochure, interest specific information and bookable product that is still provided by VIC staff.

Regional Co-operation, Partnerships and Consistency of Message

- Promote regional cooperation and resource sharing across LGAs

- Regional cooperation will significantly reduce the cost of activities such as marketing, training and infrastructure, where costs can be shared by all LGAs
- Collective and distinctive regional brand management around the information accredited brand. VICs can offer greater consistency in message delivery while also emphasising the unique qualities of their own LGA.

Training

- Identify training gaps and staff skills (including volunteers)
- Cooperative workshops and training for all staff including new technology
- Local and regional up-selling skills training
- Itinerary development
- Consumer knowledge building (research)
- Retail strategy and development (including point of sale)
- Social media and marketing
- High level visitor customer servicing
- Leadership and community engagement
- Vic best practice management (both front and back of house)
- Ambassador program
- A culture of continuous improvement

Familiarisation Program:

- Focuses on consumer knowledge building, up-selling and itinerary development (visitors, events, special and interest groups, sporting etc.)
- Participants focus on what the visitor experience could be and how they can translate what they have seen, into an up-selling proposition to the travelling and touring public
- Categorise all products by each region

- Develop accumulated categories across whole of region
- Develop commonality pathways (e.g. price, quality, distance)

Resource Sharing:

- Mobile visitor servicing/promotion van/i-bollards
- Advertising and media buying
- Communication platforms
- PR/Marketing/Copywriting/Social Media
- Graphic Design/Web Management/Social Media
- Product development
- Funding and grant specialist
- Fee for service activities for commercial businesses
- Build partnerships and alliances that cross LGAs (major players, supermarkets, shopping centres)
- Increase participation in cooperative marketing
- VIC staff skills shared across all LGAs
- VIC whole of region staff roles (front of house, customer service training)
- Tourism management buying group
- Retailing
- Unified booking platform
- Training
- Systems and operational/policy manuals
- Customer service data and metrics

REPORT: 2013-2016 / Site New Zealand Corporate Profile and Strategic Plan

PREPARED BY: Tourism New Zealand, 2012

Tourism New Zealand produced a corporate profile and strategic plan 2013-2016 for its Visitor Information Centre network in 2012. Relevant information and key points relating to this study are summarised below:

History

- The Visitor Information Network (VIN) was established in 1990; in 1999 the VIN became an incorporated society (VIN Inc.)
- i-SITE was launched in 2002 to develop a distinct official visitor information brand. Visitor centres nationwide must apply to i-SITE New Zealand if they wish to become an accredited member

New Zealand Tourism Board & VIN Inc.

- Tourism New Zealand manages the i-SITE brand through funding and in-kind support to i-SITE New Zealand, which, in turn, markets and supports the network.

i-SITE New Zealand Management

- The management, administration and marketing of i-SITE New Zealand is largely funded through an annual grant from Tourism New Zealand and membership fees. The day to day running of individual centres is funded by booking fees, retail sales and other income, and supported by Local Government either directly or indirectly (through incorporated societies, trusts or Council controlled organisations).

Brand



Source: Tourism New Zealand, 2013-2016 i-SITE corporate profile and Strategic Plan, 2012



Source: Tourism New Zealand, 2013-2016 i-SITE corporate profile and strategic Plan, 2012

- The i-SITE brand creates a distinctive look which distinguishes the official network from other information centres
- By combining the two strong, simple images, the i-SITE logo has the potential to cut through the myriad of tourism offerings. The logo incorporates the internationally recognised symbol for information - the letter 'i' and the Brand New Zealand fern mark.
- Represents a focus on the delivery of quality information and product

Promoting the Brand

- Marketing strategy aimed at raising awareness of i-SITE and its service offering
- i-SITE New Zealand produces resources, including a i-SITE location map, website and corporate profile
- The resources are used to promote i-SITEs offshore via trade and consumer shows, and to advocate for continued Local Government support in the operation of i-SITEs.
- Individual i-SITE Visitor Centres are encouraged to promote their own centre under the i-SITE brand in local tourist guides and maps and within other local community publications

Location

- Generally located in prime central city areas with highly visible building and directional signage;
- Are on the main visitor route through a township;
- Also located at the airport in some of New Zealand's largest cities;
- Well identified in maps, guidebooks and at accommodation providers.

Membership Benefits

- Use of the Network's distinctive i-SITE brand and reputation as New Zealand's official visitor information network
- Promotion of the i-SITE brand and Network through an annual marketing campaign that includes guidebooks, in-flight magazines, travel publications and airport displays
- Access to the Network's extranet website, which provides various policies, procedures and business practice templates, research reports and training information for members' reference
- Listing on the i-SITE map distributed nationally and internationally
- Participation in the annual membership Qualmark assessment process that provides centres the opportunity to evaluate their performance and to continually improve the quality of their operations and customer service
- Access to i-SITE New Zealand Training which incorporates unit standards from the national qualifications framework towards the National Certificate in Tourism Level 4 and Diploma in Business Level 5
- Profile in Tourism New Zealand's promotional material including its website www.newzealand.com, ensuring visitors will recognise network members and the values they represent
- Access to benchmarking research
- Regular communication with other members, via workshops, seminars and the i-SITE New Zealand annual conference
- Guidance and policy direction from the VIN Inc. Management.

i-SITE New Zealand Strategy 2013-2016

Strategy One: Build profile through partnership brand marketing

- Refine the i-SITE brand to better communicate role and value proposition
- Reprioritise i-SITE funding
- Increase i-SITE awareness and use by Kiwis to boost domestic sales and reach overseas visiting friends and relatives markets
- Immerse i-SITES in digital promotion and information provision, including newzealand.com, apps and mobile geo-location technology
- Investigate provision of free Wi-Fi throughout network to attract visitors

Strategy Two: Boost network productivity

- Re-focus network training on topics of primary relevance to i-SITES
- Improve the efficiency of i-SITE booking and information systems
- Foster more productive member networking
- Develop and share best practice resources
- Develop opportunities to grow margin and new revenue streams

Strategy Three: Resource i-SITE NZ and encourage members to innovate and find efficiencies

- Strengthen i-SITE staffing resource within Tourism New Zealand
- Membership fee investment levels maintained with an allowance for inflation increases
- Adjust criteria to reduce unnecessary compliance costs for members and Local Government
- Encourage regional integration of i-SITES
- Develop stronger and more consistent visitor information delivery partnerships with Department of Conservation
- Stronger partnerships with Qualmark and Maori product

Strategy Four: Increase i-SITE business intelligence and demonstrate value to our stakeholders

- Invest in more robust monitors of i-SITE economic impacts - monthly data reporting on key metrics by all i-SITEs
- Plan and deliver a Local Government and industry advocacy programme
- Engage in industry support for sustainable commission booking models

In Summary:

- Confirmation of a new strategic alignment with Tourism New Zealand
- A refreshed logo highlighting i-SITEs as New Zealand's official information and booking network
- More brand marketing for inbound markets particularly Asia
- Higher profile for i-SITEs in all Tourism New Zealand digital channels
- Training focused on customer service and up-selling techniques
- Facilitate improved booking and information systems
i-SITE staff support within Tourism New Zealand
- Stable membership funding levels with more directed to marketing and training
- More flexible opening hours catering to visitor demand with after-hours back up
- Stronger partnerships with Department of Conservation, Qualmark and Maori
- Local government owners understanding and valuing their investment

REPORT: *New Zealand Tourism Strategy 2015*

PREPARED BY: *Tourism New Zealand, 2007*

Looking Forward

- The tourism sector needs to provide easily accessible, accurate information, such as that which is available through the i-SITE network. Those working in

the sector need to be able to use the latest information technology and understand how their visitors are using it

- The i-SITE network is recognised by visitors as being a source of high-quality and objective visitor information, to achieve this the following is required:
 - Build on the common business and information systems in the i-SITE network to make sure that i-SITES across the country offer a consistent experience
 - Carry out research into ways in which the i-SITE network could be used to help improve visitor experiences. This would build on previous research into the information needs of i-SITE users.

REPORT: *West Coast Visitor Centre Review, New Zealand*

PREPARED BY: *Deloitte, 2008*

Touch Screens

Although these initially seem to add value, issues include:

- only one person at a time being able to use them
- The need for more advertiser investment by already stretched local operators
- Increasing public internet access points and the future trend towards mobile internet access these are likely to become more redundant

Queuing Systems

- Queue management is becoming an issue in busier centres. Nelson i-SITE invested in an electronic queuing system which has allowed visitors to ensure the next available consultant whilst liberating them from standing in queues so they can browse other information and visit the separate DOC counter without losing their place in the line for service

Centralised Management

- Nelson and Auckland are two examples of regional networks where more i-SITES are being managed as a group by the RTO

- Tourism Auckland's management has resulted in a reduction of a large council funded operating deficit to return a significant operating surplus from the mainland sites which helps to fund other marketing activities
- One of the benefits of centralised management has been the ability to package operator advertising options whereby an operator can choose brochure display in relevant i-SITEs and regional brochure advertising all through one interaction on Latitude Nelson's web site

i-SITE National Database

- National Tourism database for the i-SITE network
- Operators entering their own information and local i-SITEs designated as local 'host sites' with responsibility for vetting operator content and posting it to the live database accessible by all i-SITEs
- This development will resolve issues of duplicated resource in tourism data maintenance
- It is seen as a strategy advantage for i-SITE members

Future Visitor Information Technology

- The world is moving toward a web 2.0 environment placing destination image under increasing control of the consumer, giving them the ability to post independent comment and blogs on tourism experiences and destinations to a global audience
- Cars include SatNav or similar systems, greatly assisting tourists with navigation in unfamiliar destinations
- Technology developments indicate that much of the basic information currently sought from visitor centres may be easily accessed at the press of a button.
- Technology will also enable accommodation and other services to be searched, confirmed as available and paid for from mobile devices
- The web 2.0 environment is delivering a vast array of content and the personal recommendations available through blogs are difficult to verify so it has the potential to increase confusion.

- There will remain a fundamental preference by travellers, especially the growing retired traveller market, for human interaction and personal recommendation.
- The potential of new technology should however highlight the risk of major investment in permanent printed information and new manned visitor centre sites becoming redundant or at least providing smaller benefits than investment in electronic content systems

Satisfaction

- To achieve superior satisfaction levels, visitor centres should aim to have relatively high staffing levels with well trained staff who listen carefully to visitors' needs, provide individualised attention and tailor information to visitors' specific requirements

Brand Awareness

- 85% of i-SITE visitors were aware there was an official network of information centres in New Zealand and this had increased from 77% in 2002.
- 2007 research showed brand awareness had plateaued and suggest that future brand marketing might highlight the fact that i-SITE is the *only* official visitor information network

Visitor Information Needs

- VisitScotland commissioned research on consumer information needs for trips to Scotland:
 - Visitors require a different balance of inspiration and information at each trip stage. Pre-trip planning an equal balance is required, on arrival the priority is on information and during the trip the balance shifts back to a combination of both information and inspiration. There was considered to be a partial failure to deliver this inspiration in visitor centres with static information

REPORT: *Presentation of “the Visitor Information Journey”*

PREPARED BY: *City Of Melbourne, Nitty Gritty Research*

This review relates to information presented by the City of Melbourne relating to a study of visitor information journeys. The study surveyed 660 visitors to Melbourne.

As a result of the research the City of Melbourne has proposed the following projects which aim to address the way visitors are using information.

- Creating a single map for Melbourne, available throughout the visitor journey (pre, arrival and during trip);
- Capitalise on social media and online channels;
- Sharing content and resources with various information channels
- Ensure cultural and language sensitivity by translating content and cultural training for staff and volunteers
- Empower locals to become destination champions;
- Improve inbound content provision;
- Make a good first impression on arrival;
- Improve access to WIFI
- Provide mobile visitor information services at conferences;
- Improve signage and wayfinding
- Capitalise on visitor generated content by encouraging visitors to share experiences of the city in various channels.

Many of the challenges facing the City of Melbourne are relevant to other regions in Victoria. Some of the research from this study has been integrated in this report.

Appendix B CONSULTATION LIST

The following is a list of persons consulted through the course of the study. These consultations occurred as face to face interviews, phone interviews, small workshops and forums.

Name	Title	Organisation
Virginia Smedley	Visitor Information Centre Officer	Sunbury Visitor Information Centre
George Osborne		Hume City Council
Mary McArthur	Coordinator Visitor Services	Hamilton & Grampians Visitor Information Centre
Diane Barrera	Tourism Development Manager	Southern Grampians Shire Council
John Collins	Economic & Tourism Development Manager - Sustainable Development	Hepburn Shire Council
Debra Shaddock	Tourism Services Co-ordinator	Hepburn Shire Council
Janet Dawes	Manager - Arts, Events and Tourism	Hobsons Bay City Council
Emma Keith	Tourism Development Coordinator	Rural City of Wangaratta
Teresa Mahood	Tourism Coordinator	Bass Coast Shire Council
Nadine Simpson	Coordinator	Rutherglen Visitor Information Centre
Marion Hansford	Chair	Destination Rutherglen
Penny MacGregor	Manager	Beechworth Information Centre
Mark Cuthell	Coordinator	12 Apostles Visitor Information Centre - Port Campbell
Anne-Marie Haluszka	Visitor Information Centre Coordinator	Peninsula Visitor Information Centre & Booking Service
Alva Hemming	Executive Officer	Mornington Peninsula Tourism
Annika Hofmann		ATAP
Elizabeth Curtain	Visitor Information Centre's Coordinator	Geelong Otway Tourism
Lakshmi Cashmore		Geelong Otway Tourism
Maree Glasson		Greater Shepparton Visitor Information Centre
Tim Booth	Coordinator Visitor Services	Ballarat Regional Tourism
Jim McConkey	Business Manager	Ballarat Regional Tourism
Jo Bagg	Manager	Yarra Valley Visitor Information Centre
Paul Stampton	Manager Strategic Planning and Development*	South Gippsland Shire Council

Name	Title	Organisation
Anne Lacey	Program Manager, Tourism Operations, Tourism Melbourne	City of Melbourne
Renee Nesbitt		City of Wodonga
Mat Bradley	Acting team leader community and tourism focus	City of Wodonga
Viv Collins	Visitor Services Manager, Tourism Unit	City of Greater Bendigo
Tanya Bonte		City of Melbourne
Joseph Tabacco		Mitchell Shire Council
Simon Loone	Tourism Manager	Surfcoast Shire
Lindsay Thomas		Benalla Rural City Council
Margret McKenzie		City of Bendigo
Will Flamstead	Chief Executive Officer	Grampians Regional Tourism Board
Kim Storey	Chief Executive Officer	Destination Phillip Island
Sara Quon	Chief Executive Officer	North East Regional Tourism Board
Hugh Koch	Economic Development Manager	Southern Grampians
John Munns	Visitor Information Services Coordinator	East Gippsland Shire
Elizabeth Curtain		Geelong Otway Tourism
Eamonn Seddon	Tourism Manager	Launceston City Council
Paul Yeo	I-SITE Executive Manager	Tourism New Zealand
Nicole Scheetz	Visitor Information Centre Manager	Frankston City Council
Julie Kukainis	Manager	Mansfield Mt Buller Regional Tourism Association Ltd