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Disclaimer

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The original stated goal of the project was to ascertain the viability and sustainability of a Yarra Valley business and tourism hub in Lilydale.

EXECUTIVE SUMMARY

Project Brief

The Project Brief issued by Yarra Ranges Regional Marketing Limited (YRRM) highlighted that the Victorian Government, in June 2011, announced funding to undertake a feasibility study for a tourism hub in Lilydale. The Brief specified that some of the key elements of such a business and tourism hub might include:

- Visitor Information Centre (VIC);
- Home for industry and tourism associations;
- Retail space;
- Showcase space;
- Allied businesses; and
- "Creative house" e.g. specialist services such as designers, architects, etc.

The project was overseen by a four member Steering Committee:

Mark Challis (Steering Committee Coordinator)  Yarra Ranges Regional Marketing
Simon O’Callaghan  Yarra Ranges Council
Ross Stevens  Yarra Valley Regional Tourism Association
Paul Albone  Tourism Victoria

The original stated goal of the project was to ascertain the viability and sustainability of a Yarra Valley business and tourism hub in Lilydale.
At the outset of the study, members of the Project Steering Group expressed the view that in considering investment in physical visitor information delivery platforms, the study team might also consider supplementing physical delivery with remote (virtual) delivery platforms to provide improved information and booking services to visitors.

Subsequently, SGS Economics and Planning (SGS) has investigated remote information delivery platforms and identified rapidly growing use of mobile internet and mobile applications in pre and mid trip planning. This raised questions about the future relevance of a substantial investment in one built Visitor Information Centre. The SGS study team then sought to revise the original project objective to reflect this rapidly evolving situation.

**The revised goal of the project was to determine a suite of visitor information delivery platforms that would improve visitor yields and dispersal in the Yarra Valley and Dandenong Ranges.**

SGS was commissioned to undertake the study, reflecting the original Brief issued by YRRM, SGS’s response to this Brief and the detailed discussion that subsequently occurred amongst the Project Steering Group (PSG).

**Project Findings**

Given this evolved Brief, SGS approached the feasibility study by reviewing existing research, undertaking consultation and case studies, and establishing additional insights which help to answer the following five key questions.

**Q.** *Is there a need for improved visitor information delivery in the Yarra Valley and Dandenong Ranges region?*

**A.** Yes

To provide information and booking services to domestic and international visitors, to encourage dispersal and increased length of stay throughout the Yarra Valley and Dandenong Ranges region.

To provide Yarra Ranges residents with better resources to plan their Yarra Valley trips and to plan trips for visiting friends and family.

**Q.** *How is the use of visitor information services changing in Australia?*

**A.** VICs are increasingly being co-located with visitor attractions and (re)located where there is high pedestrian and vehicle traffic exposure, and accessibility (parking and connection to main roads). Complementary and support activities (e.g. call centres) are being located away from VICs in lower rent/ lower exposure locations that are more cost effective. VICs have also taken a step away from being a public agency and toward providing a commercial service by shifting from solely providing information to also undertaking bookings, reservations and ticketing.
Domestic and international visitors are becoming increasingly equipped to search online via mobile and fixed internet to make bookings while they travel. Data from the TNS Infratest Onliner Atlas survey (Germany) indicates that senior citizens are rapid adaptors to the use of digital technology. In ten years time, virtually everyone travelling through the Yarra Valley will be equipped and literate to make online enquires and bookings during their trip.

If there is sufficient evidence to show that alternative combinations of virtual and personal delivery platforms can field a similar or greater number of visitor enquiries and bookings at lesser cost, then the tourism hub concept will be outmoded.

Q. **What does this mean for physical and electronic delivery of visitor information in the Yarra Valley and Dandenong Ranges?**

A. The Tourism Hub concept appears outmoded. Alternative virtual and physical visitor information delivery platforms appear to offer better opportunities for expanding or restructuring visitor information delivery in the Yarra Valley and Dandenong Ranges. The research indicates that Visitor Information Centres are still needed, albeit in a different format where a location meets the following criteria:

- The site is prominent and offers good signage opportunity
- There is an existing pattern of visitor/local pedestrian and vehicle traffic
- Other visitor attractions are co-located or adjacent, and
- There is good vehicle and/or public transport access.

The Tourism Hub concept relies in part on there being economies of scale in locating tourism support activities such as website maintenance and tourism marketing with a frontline VIC. This report finds that this is not the case. VICs seek high rent locations and that there are few practical benefits in locating these lower rent seeking activities with the VIC.

Future decisions about resourcing of dedicated Yarra Valley and Dandenong Ranges VICs should consider alternative more cost effective means of physical (in-person) information delivery than stand alone VICs. Visitor information delivery via standalone VICs is vastly more expensive than visitor information delivery via co-located, modular and mobile VICs or via street ambassadors or virtual platforms.

Q. **Where and how should visitor information services be delivered in the Yarra Valley and Dandenong Ranges region?**

A. The implications for physical and electronic delivery of visitor information in the Yarra Valley and Dandenong Ranges have been translated into a recommended mix of existing and new visitor information platforms in the region, as shown in the map and listed on the following page:

In particular, the provision of free wireless hot spots would leverage the growing use of mobile devices and enable travellers to access travel information while they journey - including important accessing social media updates and uploads of experiences and images.
Future Yarra Valley visitor information platform development priorities identified by SGS Economics and Planning in the course of this study include:

1) The establishment of 20 free wireless hotspots at seven main street locations in Yarra Valley town centres; and 13 Yarra Valley visitor attractions.

2) The training of front line staff as tourism ambassadors at selected community facilities and selected Yarra Valley visitor attractions.

3) The redirecting of some staff hours from the Healesville VIC to a street ambassador function in Healesville’s main street.

4) Improvements to mobile telephone and high speed mobile broadband coverage to create a continuous network of uninterrupted coverage:
- Along the Maroondah Highway from Lilydale to the eastern municipal boundary at the Black Spur Range;
- On the Melba Highway from Yarra Glen to Dixon’s Creek;
- On the Warburton Highway from Lilydale to Reefton;
- On the Healesville – Koo Wee Rup Road between Healesville and Woori Yallock;
- On Don Road between Healesville and Launching Place; and
- On the Healesville – Yarra Glen Road.

Q. *How might the success of different visitor information platforms in delivering these services be measured?*

A. The operation of visitor information delivery platforms should contribute to the realisation of local economic development outcomes for the region. Tourism specific development outcomes for Victoria’s regions are expressed in the Regional Tourism Action Plan 2009 – 2012. Success against these outcomes can be measured by the following VIC performance indicators.

<table>
<thead>
<tr>
<th>Outcome Sought</th>
<th>Performance Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased visitor yields</td>
<td>Increasing daily visitor expenditure in the Yarra Valley and Dandenong Ranges (YVDR) region (monitor from YVDR Campaign Region market profile).</td>
</tr>
<tr>
<td>Improved efficiency of visitor information delivery</td>
<td>Reduction in the total cost of securing a booking. Reduction in the average length of telephone enquiry conversations about visitor product (where a booking is not secured).</td>
</tr>
<tr>
<td>Increased mid week visitation and smooth occupancy peaks and troughs</td>
<td>Average accommodation occupancy rates (measure from commercial accommodation data, ABS).</td>
</tr>
<tr>
<td>Increasing consumer demand for regional experiences.</td>
<td>Increasing multi-day itineraries in the YVDR (measure as VIC booking of overnight stays or multi day itineraries for enquirers. VIC performance can also be compared against trends in domestic and international overnight visitation to the region).</td>
</tr>
<tr>
<td>Improved dispersal of visitors throughout the Yarra Valley and Dandenong Ranges.</td>
<td>Diversification of visitor itineraries (measure by tracking whether the opening of the VIC impacts on the ratio of visits to selected core products (e.g. wineries) compared to emerging products (e.g. spa and well being).</td>
</tr>
<tr>
<td>Increased length of stay</td>
<td>Increased total visitor nights and increased number of day trip visits to the region</td>
</tr>
<tr>
<td>Improving the supply of tourism experiences</td>
<td>Growth in product inventory (measure over time as the number of local tourism related businesses imputed into the VIC booking system or advertising in centre).</td>
</tr>
<tr>
<td><strong>Outcome Sought</strong></td>
<td><strong>Performance Indicator</strong></td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Improving the quality of tourism experiences</td>
<td>Visitor satisfaction surveys and feedback (measure satisfaction of visitors with VIC and product experiences separately but concurrently)</td>
</tr>
<tr>
<td>Improving regional industry structures</td>
<td>Reduced reliance on volunteers (measure as a % of VIC workforce).</td>
</tr>
<tr>
<td></td>
<td>Increased participation of tourism businesses in regional and local tourism associations, following the opening of the VIC (measure as membership of Yarra Ranges Business &amp; Tourism).</td>
</tr>
<tr>
<td>Addressing skills and service standards</td>
<td>VIC staff performance standards (measure by external audit e.g. mystery shopper).</td>
</tr>
</tbody>
</table>
To grow domestic overnight visitation to the Yarra Valley and Dandenong Ranges and to increase length of stay of domestic overnight visitors

1 PROJECT CONTEXT

1.1 Project Background

The Project Brief issued by Yarra Ranges Regional Marketing Limited (YRRM) highlighted that the Victorian Government, in June 2011, announced funding to undertake a feasibility study for a tourism centre in Lilydale.

There is no single physical information stopping point at the ‘foot’ of the Yarra Valley that can capture visitor flows from Melbourne that are continuing on to via the Warburton, Maroondah and Melba Highways. The commitment to fund this study recognised that the desire for a single business and tourism hub in this location (Lilydale or Chirnside Park) had previously been expressed by the Yarra Valley Regional Tourism Association.

The Brief specified that some of the key elements of such a business and tourism hub might include:

- Visitor Information Centre (VIC);
- Home for industry and tourism associations;
- Retail space;
- Showcase space;
- Allied businesses; and
- “Creative house” e.g. specialist services such as designers, architects, etc.
1.2 Project Purpose

To grow domestic overnight visitation to the Yarra Valley and Dandenong Ranges and to increase length of stay of domestic overnight visitors

The number of domestic overnight visitors and visitor nights spent in the YVDR decreased between 2000 and 2010, while the number of daytrip visitors increased (see Table 1). Declining domestic overnight visitors and marginal increases in domestic daytrip visitors suggest that the YVDR region is not attracting as many visitors as possible and that visitors are electing to stay in Melbourne or other regional destinations.

The YVDR accommodation sector is dominated by small providers, many of whom have very limited resources to independently market their product. Many providers are not located on the main (Maroondah) Highway and are invisible to most passing traffic. These businesses rely on improved partnerships with coordinated visitor information platforms including VICs and destination websites, and referral from other businesses to raise awareness and bookings.

To better realise the potential of the Yarra Valley and Dandenong ranges to attract international day and overnight visitation and to extend the length of stay of international overnight visitors

The number of international overnight visitors has more than doubled between 2000 and 2010, albeit from a low base. Melbourne has consolidated itself as a major international tourist destination during the past twenty years, meaning that international visitors may be more predisposed to stay in Melbourne itself and take day trips rather than stay in this region.¹

Table 1: Yarra Valley and Dandenong Ranges Visitation, 2000 and 2010

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
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<tbody>
<tr>
<td>Domestic</td>
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<td></td>
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<td>Overnight visitors</td>
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<td>Daytrip visitors</td>
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<td>8%</td>
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<td>Total visitors</td>
<td>3,534,000</td>
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<td>-14%</td>
</tr>
<tr>
<td>International</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overnight visitors</td>
<td>15,200</td>
<td>25,000</td>
<td>64%</td>
</tr>
</tbody>
</table>

Source: Tourism Victoria²

¹ As data is compiled using combined YVDR numbers, it is difficult to determine what is occurring in each of the two individual locations.

² Yarra Valley and Dandenong Ranges Market Profile Year Ending December 2010
To improve dispersal of visitors throughout the Yarra Valley Dandenong Ranges Region

Figure 1 shows the dispersed location of wineries and cellar door wine retailers in the region. YVDR tourism businesses are widely dispersed and are not located on any one highway or in any one town. As a consequence, a visitor undertaking any single return itinerary within the region will not see the roadside signage of most tourism businesses. The 60% of visitors to the Yarra Valley that are travelling specifically to visit one or more attractions\(^3\) are more likely to travel ‘point to point’ rather than make unexpected stops, because their itineraries are partially planned and timed.

To provide Yarra Ranges residents with better resources to plan their Yarra Ranges trips and to plan trips for friends and family

In 2009, 11% of visitors to Yarra Ranges municipality were primarily visiting friends and family\(^4\). Visitors seeing friends and relatives spend less on accommodation than un-hosted holiday/leisure visitors. These visitors spend less on average than the holiday/leisure visitor overall, but may shift spending from accommodation to meals (including meals for hosts) and activities and attractions. Tourism Research Australia data\(^5\) shows that at a state-wide level, holiday/leisure overnight visitors spend an average of $172 per day compared to VFR overnight visitors who spend an average of $93 per day.

Visitors staying with friends and family are expected to comprise a significant share of day visitors to Yarra Valley and Dandenong Ranges activities and attractions. These visitors are more likely to use the local knowledge of their friends and relatives, and may be less inclined to use formal visitor information platforms than holiday/leisure visitors; however, the local population who host VFR visitors use visitor information platforms to pre-plan shared itineraries and gather information to provide to their VFR guests. These platforms must therefore also be accessible and understood by the local population. In the case of Yarra Ranges, there is a gap in visitor information delivery in the most heavily populated (Lilydale) area of the municipality.

---

\(^3\) Urban Enterprise, Visitor Information Services Research Study (2009)

\(^4\) Urban Enterprise, Visitor Information Services Research Study (2009)

1.2 Project Purpose

To grow domestic overnight visitation to the Yarra Valley and Dandenong Ranges and to increase length of stay of domestic overnight visitors. The number of domestic overnight visitors and visitor nights spent in the YVDR decreased between 2000 and 2010, while the number of daytrip visitors increased (see Table 1). Declining domestic overnight visitors and marginal increases in domestic daytrip visitors suggest that the YVDR region is not attracting as many visitors as possible and that visitors are electing to stay in Melbourne or other regional destinations.

The YVDR accommodation sector is dominated by small providers, many of whom have very limited resources to independently market their product. Many providers are not located on the main (Maroondah) Highway and are invisible to most passing traffic. These businesses rely on improved partnerships with coordinated visitor information platforms including VICs and destination websites, and referral from other businesses to raise awareness and bookings.

To better realise the potential of the Yarra Valley and Dandenong ranges to attract international day and overnight visitation and to extend the length of stay of international overnight visitors. The number of international overnight visitors has more than doubled between 2000 and 2010, albeit from a low base. Melbourne has consolidated itself as a major international tourist destination during the past twenty years, meaning that international visitors may be more predisposed to stay in Melbourne itself and take day trips rather than stay in this region.

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Source: Tourism Victoria

As data is compiled using combined YVDR numbers, it is difficult to determine what is occurring in each of the two individual locations.

Yarra Valley and Dandenong Ranges Market Profile Year Ending December 2010

---

**Figure 1** Yarra Ranges Wineries and Cellar Door Wine Sales

Source: Yarra Valley Winegrowers Association
The revised goal of the project was to consider alternate visitor information delivery options for the Yarra Ranges.

1.3 Project Objective

The original stated goal of the project was to establish the need for and viability of a gateway tourism facility incorporating a visitor centre.

At the outset of the study, members of the Project Steering Group expressed the view that investment in a single physical facilitation point may not be the most effective use of community and Government resources in providing improved information and booking services to visitors. In particular, evidence of the growing use of mobile internet and mobile applications in pre and mid trip planning raised questions about the future relevance of the built Visitor Information Centre. SGS Economics and Planning research also supported this view and SGS was subsequently asked to revise the original project objective to reflect this rapidly evolving situation.

The revised goal of the project was to consider alternate visitor information delivery options for the Yarra Ranges.
1.4 Project Brief

SGS Economics and Planning Pty Ltd (SGS) was commissioned to undertake the study. This commissioning reflected the original Brief issued by YRRM, SGS’s response to this Brief and the detailed discussion that subsequently occurred amongst the Project Steering Group (PSG).

Clear outcomes were that:

- The focus was on establishing what role a Visitor Information Centre (VIC) might play within a broader mix of visitor information platforms, given the existing lack of a ‘gateway’ visitors’ centre to the Yarra Ranges region.
- The Lilydale location reflected a priority identified by the industry, as it captures the vast bulk of visitors on route to the Yarra Ranges, i.e. before the Maroondah Highway splits into the Warburton, Maroondah and Melba Highways. However the objective of the study since broadened to consider a network of visitor delivery platforms throughout the region.
- Businesses and tourism services that might co-locate with the VIC must enhance the offer to visitors, as well as the effectiveness, viability and sustainability of the centre from an ongoing operational perspective.

1.5 Project Methodology

Given this evolved Brief, SGS approached the feasibility study by reviewing existing research, undertaking consultation and case studies, and establishing additional insights which help to answer the following questions.

1.5.1 Stage 1(a)

1. Is there a need for improved visitor information delivery in the Yarra Ranges region? (addressed in Sections 1.2 and 1.3)

2. How is the use of visitor information services changing in Australia?

3. What does this mean for physical and electronic delivery of visitor information in the Yarra Ranges?

4. Where and how should visitor information services be delivered in the Yarra Ranges region?

5. How might the success of different visitor information platforms in delivering these services be measured?

Answers to these questions provide the feasibility study with core insights about proposed visitor information platforms in terms of functionality, floorspace/footprint, services and location, and also about how existing and new visitor information platforms would interact with each other.
1.6 Remainder of this Report

The remainder of this report focuses specifically on answering the questions posed in Stage 1(a). In accord with this, the remainder of this report is structured as follows:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section 2</strong></td>
<td>Describes the recent evolution of visitor information delivery in Australia in response to changing trip planning behaviour by visitors. How visitor trip planning behaviour is expected to continue to change and the implications of this for future delivery of visitor information services are also explored.</td>
</tr>
<tr>
<td><strong>Section 3</strong></td>
<td>Emerging trip planning behaviours call for new electronic visitor information delivery platforms. These include mobile devices, interactive touch screens and GPS. This section looks at how these new forms of visitor information delivery will impact on the need for physical visitor information delivery through VICs, ambassador programmes and other physical media.</td>
</tr>
<tr>
<td><strong>Section 4</strong></td>
<td>The findings from Section 2 and 3 are translated into the Yarra Valley and Dandenong Ranges context. The expected preference/use of different visitor information platforms by Yarra Valley and Dandenong Ranges visitors, across a 20 year future horizon are considered along with the cost of delivery of different platforms. This translates into a recommended mix of existing and new visitor information platforms to be made available across the region.</td>
</tr>
<tr>
<td><strong>Section 5</strong></td>
<td>Investigates key performance measures for different visitor information platforms including cost effectiveness and ability to target otherwise ‘hard to reach’ markets.</td>
</tr>
</tbody>
</table>
2 THE EVOLUTION OF VISITOR INFORMATION DELIVERY IN AUSTRALIA

2.1 How Visitors Currently Source Information

The traveller sources information at all stages of trip planning and implementation. There are many types of information available to travellers and the way information is used varies.

The way a traveller uses and relies on information sources is affected by prior knowledge of the destination. For example, a traveller unfamiliar with a destination is more like to use external information sources (such as the internet, recommendations by friends, brochures etc), while a traveller familiar with a destination will use less external information sources and rely more on internal knowledge to make a travel decision6.

Information can now be sourced via an increasing number of means, from more traditional media (brochures, directories and phone enquiry) to electronic media (computers, smart phones etc), the latter of which is becoming more widely accessible and widespread in use. Electronic media has changed the way people source information and has enabled people to access information 24 hours a day, from anywhere in the world7.

DiPietro et al8 looked at how travellers make decisions and source information after arriving at their destination. The paper discusses how the increasing role of technology in the travel decision making process has led to an increase in information sources available to travellers and how many of these sources enable travellers to easily access information at various stages of travel, including en route (while they are in their vehicle).

Figure 2 on the following page presents a selection of information paths that travellers may use to research and decide on purchasing a tourism product. The figure demonstrates that information use varies between travellers and can be influenced by factors including a person’s previous experience in a region or their relative preference for using technology and/or personal contact to inform their decision making. The figure shows how multiple sources are typically used and how some information paths enable the traveller to filter out less suitable options more efficiently than others.

In Figure 2, each line represents one travel option. Each vertical bar represents a visitor information platform. The different user groups select their preferred travel option by engaging with their preferred platforms.

---

Figure 2: Information Sources & Visitor Decision Making

Source: Compiled by SGS Economics and Planning
2.2 A Changing Role for Visitor Information Centres

Visitor Information Centres (VICs) help to promote and manage local tourism and to enhance the visitor experience through providing quality information and a high level of customer service. VICs provide information and recommendations on specific visitor products and help orient visitors to local and regional attractions and businesses, ultimately leading to increased visitor spending and time spent in the region\(^9\). VICs also play a role in promoting surrounding regions and provide information and guides for regions in other states\(^{10}\).

Traditionally, the primary role of a VIC has been to field visitor enquiries and to convert visitor enquiries into referrals and bookings for tourism related businesses, including accommodation, attractions and activities. This broadly occurs via three means, responding to walk in and telephone based enquiries and, more recently, responding to email/internet generated enquiries.

Some VICs have evolved to become multi-functional centres and also play a role in\(^{11}\):

- Providing information and communication in emergency situations and natural disasters\(^{12}\);
- Controlling and filtering visitor flows and acting as a substitute for on-site visits to environmentally sensitive areas;
- Providing community meeting spaces, serving as a venue for local events, and a place for tourism authorities to locate administration needs; and
- Promoting local export industries, including the production of art and craft, or food and wine.

Some VICs have also become an attraction themselves, through having innovative displays or interpretive centres\(^{13}\).

In recent years, the role of VICs has transitioned from reactive information providers to centres of proactive business generation. VICs are now expected to harness business opportunities for the local economy, by maximising visitor yield in a region and directing visitors to appropriate businesses. The role of some VICs has now evolved to become booking or reservation centres, including providing ticketing services for tours and local events\(^{14,15}\). One advantage of a VIC offering a booking service, and not just information provision, is that it reduces the risk of visitors not making a booking after recommendation from the VIC.

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\(^{10}\) Phone interview with Danielle at Korumburra Visitor Information Centre, 17 April 2012


\(^{12}\) Phone interview with Kristina Burke at Victoria Tourism Industry Council, 20 April 2012


\(^{14}\) Phone interview with David Zacher at Mildura Visitor Information Centre, 18 April 2012

\(^{15}\) Phone interview with Julie Kukainis, Manager, High Country Reservations, 19 April 2012
The means for delivering these key services has also changed over time. VICs now have more of an online presence, offering web based information and booking systems. Online content is constantly updated and online systems are increasingly becoming more user-friendly. Many VICs have also developed, or are in the process of developing, smart phone apps which enable users to source information on a region, including attractions, activities, accommodation and restaurants, and make bookings (see case study on p.26).

As well as presenting an online enquiry and booking platform (which is accessible to mobile web users), some VICs (e.g. Mount Gambier) have introduced touch screen information booths and/or interactive tabletop electronic maps. Other VICs (e.g. Mildura16) are investigating introducing them. Touch Screens and interactive maps can also be located ‘stand alone’ in high visitor traffic areas away from VICs.

VICs are increasingly recognising that staff that have received professional sales training and are paid or incentivised are typically more effective and more motivated at converting enquiries into sales and at up selling. The Mansfield Visitor Centre, reports that establishing a set of key performance indicators and incentives had resulted in improved sales performance by its staff17.

**Touch Screens**

Touch screens in VICs suit use by customers after hours or at peak times when counter staff are unavailable for enquiries. At other times, touch screens might be preferred by some ‘shy’ customers who don’t have a working mobile device and prefer not to make a counter enquiry.

Other interactive touch screen kiosks provide take-away information to users. Carcloud kiosks18 can be programmed to present rich content on local and regional attractions (photographs, video and maps). Users can SMS content from the kiosk to their smart phone if they have one. These

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16 See Appendix for interview with Mildura Visitor Information Centre
17 Phone interview with Mansfield VIC
18 Email correspondence with Chris Seymour, CEO Carcloud 31 August 2012 chris@carcloud.com
kiosks are smaller than the TRAX unit and have a one off software purchase cost of $6,000 and an ongoing contractual running cost of $400 per month.

**Interactive Maps**

Interactive maps are typically table mounted but may be wall mounted. As with a touch screen, the map consists of an LCD screen containing sensors which respond to touch. The user might touch the screen to select their search criteria and then move their hand over the screen. Locations meeting the search criteria (e.g. restaurants) show up. By touching any one of these locations, detailed information is displayed about accessibility, open hours, etc. A 55 inch touch screen table can be purchased for $USD 7,000\(^\text{19}\). The cost of programming and maintaining the table software is additional.

![Tabletop Interactive Map – New York Visitor Information Centre](image1)

\(^{19}\text{Shenzen Hi Touch Technology Company website: }\text{http://hitouch.en.alibaba.com/product/631225771-214280474/42inch\_LED\_Interactive\_Touchscreen\_Table\_For\_Cafe\_Shop\_Exhibition\_Shopping\_mall.html}
A Proactive Business Generator – the City of Melbourne City Ambassador Program (CAP)

The City of Melbourne launched its City Ambassador Program (CAP) in 2001, as a mobile service operating on Swanston Street between Flinders Street and Bourke Street, in the retail core of the city. The CAP is one of the City of Melbourne's (CoM's) network of eight visitor services. The network comprises:

- The Melbourne Visitor Centre at Federation Square (MVC)
- The Melbourne Visitor Booth at Bourke Street Mall (MVB)
- The City Ambassador Program (CAP)
- The Cruise Ship Program ('meet and greet’ service)
- Melbourne Greeter Service
- Melbourne Town Hall tours
- The Melbourne Visitor Shuttle, and
- The Tourism Inbox (an email for visitor enquiries).

COM engages 360 volunteers across its visitor services network. Approximately 150 volunteers are engaged in the City Ambassador Program, with CAP volunteers working an average of one three hour shift per week. (The Melbourne Visitor Shuttle is operated under contract by a licensed bus operator).

A survey of COM visitor service users\(^{20}\) (conducted in 2011 and 2012) demonstrates the relatively high visibility of ambassadors. 68% of City Ambassador Program users were first time users of the Program – they had seen the ambassadors on the street and approached them. By contrast, 32% of Melbourne Visitor Centre (MVC) users were first-time users who saw the Centre and walked in.

Enquiries to City Ambassadors tended to be more focused on information about Melbourne City. 86% of enquiries) than enquiries to the Melbourne Visitor Information Centre, where 56% of enquiries were about Melbourne City and the remainder about the wider metropolitan area and regional Victoria. This may reflect the fact that visitors who are walking in Swanston Street and Bourke Street Mall are already 'absorbed' in the process of sightseeing and will prefer to enquire about their immediate activities, and especially to make transport related enquires.

CoM measures the effectiveness of the MVC, the MVB and CAP by monitoring their influence on services users' activity, spend, length of stay in Melbourne and likelihood of returning. The CAP’s rate of success in extending length of stay (54%) is similar to that achieved by staff and volunteers operating the Melbourne Visitor Centre (52%) and Melbourne Visitor Booth (58 %). Rates of satisfaction for the three services are very high, and all recorded 90+ per cent. In particular, 94% of respondents rated the City Ambassador program service as excellent or good, a phenomena that City of Melbourne believes could in part be attributed to the 'surprise element' of a visitor finding an ambassador on the street when there had been no or low expectation of receiving an organised information service. 91% of respondents assisted by the CAP said they were either likely or very likely to return to Melbourne as a result of using the service.

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The City Ambassador Program is less expensive to operate than a VIC that engages an equivalent number of volunteers: a street-based service doesn't require the same level of infrastructure and operating costs that a 'shop-front' service does. However, CoM stresses that the success of the City Ambassador Program is that it works as part of an integrated network - it leverages the other visitor services on offer. A City Ambassador is, for example, limited in the amount of visitor information they can carry. They can efficiently handle visitor enquiries about public transport, directions, what's on and the city's services, attractions and services. Enquiries about metropolitan Melbourne and regional Victorian attractions, itineraries, accommodation and tour bookings are typically referred to the Melbourne Visitor Centre. Enquiries about retail offers and experiences may be referred to the Melbourne Visitor Booth.
2.3 Increased Co-location of VICs with other Attractors

A VIC can attract additional visitors by anchoring onto another attractor (tourism attraction, or essential retail or service). This overcomes the inertia that discourages some travellers, particularly those with time constraints from stopping for information if they have other competing agendas e.g. the need for a meal or exercise. Locating with another attractor can influence the type of visitor using a VIC.

Southern Gateway Centre, Wollongong
The Southern Gateway Centre is a modern centre located on the Princes Highway at the northern entry to Wollongong. The gateway centre includes a restaurant and kiosk and a VIC. The VIC offers digital displays and touch screens and state of the art technology to take visitors on a virtual tour of the region. VIC staff assist visitors with planning itineraries and visitors can book accommodation or pre-purchase tickets for local attractions and activities.

Source: http://www.southerngatewaycentre.com.au/?/visitor

Korumburra Visitor Information Centre
The Korumburra VIC is located just off the South Gippsland Highway within the Coal Creek Complex. Coal Creek consists of a historical village and museum set in natural bush land and is a major tourist attraction. The VIC and Coal Creek have separate service desks but work in close conjunction. A VIC staff member identified that the location of the VIC was one of the main success factors of the VIC as it is on a main road and anyone entering town passes the VIC.

Source: Phone interview with Danielle at Korumburra Visitor Information Centre, 17 April 2012

Mildura Visitor Information Centre
Alternatively, the Mildura VIC is located in a multipurpose building which also houses the Mildura Library, a swimming pool and gymnasium complex with crèche, and a cafe. These facilities and the VIC share an entrance which gets traffic of around 50,000 people per month. As well as providing information to visitors, by locating with a public facility, the VIC also engages the local market. In addition to its main quarters, the VIC is involved in advertising local events, such as art centre productions and food and wine events, in the shared entrance to the building and offers a ticketing service (online and manual) for these events.

Source: Phone interview with David Zacher at Mildura Visitor Information Centre, 18 April 2012
Geelong Otway Tourism – Small Scale and Relocatable VICs

The Little River Princes Freeway Service Centre VIC (Little River VIC) opened in 2009 as a portable facility and then in 2011 as a permanent modular facility to replace a larger standalone VIC on the Princes Highway in Corio, Geelong. The Corio location had been proving suboptimal – it was a bulky goods retail zone in which signage and other buildings crowded out sightlines to the VIC from passing traffic. The impetus to move the VIC came in anticipation of a fall in passing traffic with the opening of the Geelong Bypass. The Princes Freeway site allows high visibility signage to be placed along seven kilometres of Freeway to prompt travellers to stop. The Little River VIC is also co-located with a busy service station and fresh produce retailers. The Little River VIC will utilise up to four volunteers on duty and can accommodate approximately 20 visitors in Centre making enquiries.

When the Little River VIC concept was in development, it was determined to adopt a smaller footprint for the centre than that of its predecessor. There were two key reasons for this. The Corio VIC had included large static displays of regional brand and product information which did not attract significant visitor attention and accounted for a significant share of floorspace rental. It was determined not to move the static displays to the new site. Secondly, walk-in accommodation bookings had fallen across the Geelong Otway VIC network over the previous three years, coinciding with rapid growth in mobile internet connectivity.

It was also determined that it would be more cost effective to focus on training and managing on fielding visitor enquiries than making in-person bookings. Volunteers at Geelong Otway’s VICs do not book product or handle cash. Consequently, the Little River VIC has a floorspace of 70 sq m compared to the 900 sq m footprint of the Corio VIC.

The Lara VIC was relocated to an existing modular building at the Lara Freeway Service Centre that was designed to house a retail tenant. The building is of basic design: it has one entrance, and an electricity mains connection but no water supply. The building is being leased to Geelong Otway Tourism.
A demountable VIC of similar design floorspace has been built for Geelong Otway Tourism and is being stored at the Geelong Council depot. The demountable VIC cost $200,000 to build, and is intended to be relocated to a chosen site for a minimum period of five years. Geelong Otway Tourism also locates 15 sq m mobile VIC (in a caravan) at Barwon Heads from Boxing Day until Easter.

Many VICs have co-located with visitor attractions and busy food and beverage or retail premises in order to increase visitor numbers, reduce costs and provide a better service to visitors. Examples of VIC relocations (see Table 2 below) show that most VICs have relocated in order to gain the pedestrian traffic benefits associated with co-location.

**Table 2: Examples of Visitor Information Centre Relocations**

<table>
<thead>
<tr>
<th>VIC</th>
<th>Relocation Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newcastle Visitor Information Centre21</td>
<td>The standalone VIC relocated to the Maritime Centre to ensure increased visitor numbers at the Maritime Centre and to provide information at a place where tourists naturally congregate.</td>
</tr>
<tr>
<td>Berri Visitor Information Centre22</td>
<td>VIC relocating to Berri Direct (sells local produce and gourmet foods) as it was unviable for Council to operate the two separately. The VIC and Berri Direct have the same opening hours and both serve a similar clientele and relocation allows the two businesses to share overhead costs.</td>
</tr>
<tr>
<td>Kalamunda Visitor Information Centre23</td>
<td>VIC relocated from sharing a civic facility (library) into a new interpretative tourist attraction located with an art gallery, seminar/function room and cafe (Kalamunda Community Cultural Centre). Features of the development include expanded car parking and bus drop off zone.</td>
</tr>
<tr>
<td>Geraldton Visitor Information Centre24</td>
<td>VIC in a character (historic) building in tourism, hospitality, commercial and residential precinct co-located with visitor attractions (brewery, outdoor cinema and concert venue).</td>
</tr>
</tbody>
</table>


2.4 Fixed Line Internet

The National Broadband Network (NBN) is being implemented across Australia within the next decade. The NBN is scheduled to be rolled out in Lilydale, Chimnside Park, Mooroolbark Yarra Glen, Healesville and Coldstream between December 2013 and December 2014\textsuperscript{25}. This will provide 12 Mbps download and 1 Mbps upload speeds to residential and business users in connected areas. The NBN rollout will have several practical implications for visitor information and booking services:

- Users connected to the NBN will be able to download and click between a greater number of tourism booking and information websites that existing broadband or mobile users without risk of their device ‘crashing’. This will make consumer browsing of tourism products online both faster and more effective in identifying optimal product choices and prices. This will improve the time and scope competitiveness of online browsing when compared to telephone or in person enquiries to businesses or VICs.
- Faster download speed and capacity will enable the development of programs that better allow the prospective visitor to virtually browse the attractions of an area they are interested in visiting. For example, these programs could build on existing programs such as Google Street View and integrate detailed information about a tourism business.
- The additional bandwidth and speeds will make tourism businesses better equipped to run and manage their own booking engines and field consumer enquiries including enquiries by video media (e.g. Skype) and to do this from their own portable devices.

The rollout of the NBN is likely to further encourage the adoption of information technology skills by Australians (the domestic visitor market). Similar high speed broadband rollouts have occurred or are occurring in the major international visitor markets of New Zealand, the United Kingdom and Germany.

**Keeping up with Technology\textsuperscript{26}**

Results from an industry led visitor survey of 234 visitors in the Yarra Valley were made available in April 2012. The survey found that the internet is used as a source of travel information by 94% of visitors to the YVDR region. Of the visitors that used the internet to gather information for their trip, most used the Visit Yarra Valley website (95%), followed by Visit Victoria (40%), Wotif (12%), Tourism Australia (11%), Expedia (7%), and Travel Agency Web (6%) sites.

As travellers now have a wealth of information at their fingertips which they can access around the clock, travellers have evolved to have a ‘book now’ mentality where they can research and book online quickly prior to travel. It is therefore of growing importance that destination marketers and tourism businesses are able to respond to this situation and offer accurate, up to date online information.


\textsuperscript{26} Yarra Valley visitor survey and phone interview with Mansfield VIC
There is evidence that older persons who have historically been reluctant to use the internet for all purposes (including making enquiries and bookings) are now taking up internet use rapidly – perhaps in response to more user friendly online content and tailored computer lessons.

In Germany, the current rate of take-up of internet use is greatest among adults 70 years or older. This age group had previously shown low rates of adoption of internet use. However, in 2012, internet use in this age group increased 3.6% to 28.2%\(^{27}\). As a comparison, internet use by the general population only increased by 1.0%.

In Australia it is expected that the traditional or ‘over 50s’ markets will in ten or twenty years time also be more technology savvy than presently. This is being supported by initiatives such as the free computer lessons provided to retirees as part of the $15 million Federal Government 
*Broadband for Seniors Program*\(^{28}\).

It is therefore reasonable to assume that within ten years, the vast bulk of the adult population of Australia, and its major international markets will be proficient internet users and will have access to high speed internet connections plus improved mobile devices including tablets and other touch screen technology.

In the United States 52% of travellers use social media to research and plan their holidays. Facebook is the single leading site used (29% of travellers) and Trip Advisor (14% of travellers) is the second single most visited site for travel information. Both of these sites offer consumer driven evaluations and recommendations of accommodation, food and beverage and visitor attractions.

In 2008, internet was the second most common booking and information resource used by interstate (28%) and intrastate (26% of visitors) prior to travelling to Regional Victoria\(^{29}\). The most popular source of information for all travellers was ‘word of mouth’ referral (34 of all visitors).


\(^{28}\) Broadband for Seniors website viewed at http://www.necseniors.net.au/tutor/bfs-intro.html

\(^{29}\) Tourism Victoria (December 2008) Booking and Information Sources
2.5 Smart Phones and Mobile Applications (Apps)

In the first quarter of 2012, 50% of the mobile phones in Australia (8.8 million phones in total) were smart phones capable of downloading mobile applications\(^\text{30}\). At that time, 37% of the Australian population owned a smart phone, making Australia’s smart phone ownership rate the second highest in the world (after Singapore). In Australia, the rate of web browsing from mobile devices is higher than that from personal computers (PCs). Globally smart phones represent a much smaller share of total mobile ownership (about 10%) but in the major international markets of New Zealand, United Kingdom and U.S.A, at least 30% of all phones are smart phones. Future smart phone market penetration can be forecast (Figure 3). In the Australian domestic market, smart phone ownership is expected to overtake standard handset ownership in 2012.

Figure 3 Share of Population using Smart Phones


Both domestic and international visitors are therefore increasingly using mobile applications to source information and make travel decisions. A 2010 survey of visitor use of mobile devices in American science museums found that 67% of all visitors to U.S. museums enjoyed having the opportunity to use their mobile device at the museum to download interpretation and information relating to the museum offer\(^\text{31}\).


To address this evolution and to enhance the visitor experience, NSW Accredited Visitor Information Centre (AVIC) is developing a mobile phone App for use across the NSW AVIC network. The App will provide an opportunity to promote a single brand and presentation of information across the network, as well as providing a means to generate revenue via advertisements and featured listings. The App will be controlled by a web based content management system, whereby the content uploads are self managed by AVIC. This will enable real time information updates to ensure the latest events and offers are displayed.

Figure 4 shows the structure of the App and the App home screen as it will appear on a Smartphone. The App will include:

- Categorised points of interest - including accommodation, restaurants, attractions, and other points of interest;
- Links to each VIC website and associated social media (Facebook, twitter);
- Static and video content;
- Interactive maps (Google);
- Driving directions;
- A ‘click to call’ function;
- A virtual passport function – this will allow users to check off (stamp) which VICS they have visited.

This evolution in technology will change how certain visitors gather and process information prior to and during their trip. Mobile devices are becoming established tools for seeking information and directions en-route to visitor attractions and accommodation. 30% of mobile users in the United States report using their mobile device to make reservations while travelling.

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2.6 Smarter GPS Navigation

A 2008 survey of visitors to the Great Ocean Road found that GPS was a minor way-finding aid used in Victoria (see Figure 5). The statistics suggest that a significant number of visitors (perhaps as much as 35% of the sample) did not use any way finding aids at all.

**Figure 5 GPS and other Way Finding Methods for Great Ocean Road Visitors**

<table>
<thead>
<tr>
<th>Navigation Aid Used</th>
<th>No of Visitors</th>
<th>% of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown and white roadside signs</td>
<td>177</td>
<td>65</td>
</tr>
<tr>
<td>Maps</td>
<td>155</td>
<td>57</td>
</tr>
<tr>
<td>Visitor information centres</td>
<td>72</td>
<td>27</td>
</tr>
<tr>
<td>Brochures</td>
<td>44</td>
<td>16</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>38</td>
<td>14</td>
</tr>
<tr>
<td>Roadside advertising billboards</td>
<td>35</td>
<td>13</td>
</tr>
<tr>
<td>Internet</td>
<td>27</td>
<td>10</td>
</tr>
<tr>
<td>GPS</td>
<td>20</td>
<td>7</td>
</tr>
</tbody>
</table>


The integration of GPS into handheld mobile devices from 2009 onward has further increased GPS use globally. There is no coordinated data on Australian GPS sales; however data on total GPS device sales in the United States shows a 55% increase in annual sales from 2005 to 2010\(^\text{33}\). In the US, 25% of people now use mobile handheld GPS to way find while travelling\(^\text{34}\).

Recent innovation in global positioning satellite (GPS) navigation has enabled more information to be displayed on the GPS screen including non road features such as visitor attractions, accommodation providers and food and beverage outlets.

GPS provides the visitor with a substitute for stopping and asking directions at local businesses or VICs in Australia.

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\(^{33}\) Nam D. Pham (2012) The Economic Benefits of Commercial GPS use in the United States

2.7 VICs Decoupled from Tourism Support Roles

In addition to the roles played by VICs, there are many other tourism and economic development activities that contribute to the regional visitor experience. These range from marketing and branding initiatives to information technology development. In the case of branding, Tourism Victoria is responsible for developing and maintaining a unified Victorian brand and hosting regional brand identities, for example their You’ll Love Every Piece of Victoria jigsaw campaign\(^{35}\). Tourism Victoria, YRRM, as well as other marketing agencies, individual businesses, groups and associations, then promote the region in accordance with this brand positioning.

Other tourism support activities that are occurring include:

- Online booking platform development and operation;
- Development and maintenance of regional and local tourism websites; and
- Developing iPhone applications for visitor navigation and interpretation\(^{36}\).

While these activities complement the role of the VIC, there is no practical need for them to be located within or adjacent to the VIC. The provision of these services can occur at a distance to the VIC, thereby reducing site rental costs, and freeing up floor space for yield increasing activities, namely the provision and/or sale of tourism product.

The suite of tourism industry support activities is shown in Figure 1. Indeed, VICs that were consulted as part of this study identified that some of the main success factors of their VIC could be attributed to good partnerships and marketing opportunities with regional tourism associations\(^{37}\) and good relationships with stakeholders (including tourism associations) and local industry to help deliver a range of different services\(^{38}\) \(^{39}\). The Mildura VIC identified that it had a good relationship with local event organisers and has been able to leverage these connections to increase accommodation bookings within the area (via setting up a mobile VIC at an event and take bookings on a lap top with the BookEasy system).

While these initiatives and services complement the VIC and work towards increasing tourist visitation and yield in the region, they are not within the core VIC functions and are therefore beyond its functional scope. Notwithstanding this, there may be opportunity for the VIC to partner with these associations to deliver relevant activities in the future.


\(^{37}\) Phone interview with Danielle at Korumburra Visitor Information Centre, 17 April 2012

\(^{38}\) Phone interview with David Zacher at Mildura Visitor Information Centre, 18 April 2012

\(^{39}\) Phone interview with Julie Kukains, Manager, High Country Reservations, 19 April 2012
Figure 6: Tourism Industry Responsibilities beyond the Role of the VIC

Source: Compiled by SGS Economics and Planning
2.8 The Cost of Delivering Different Visitor Information Platforms

One benchmark of the cost effectiveness of different visitor information platforms is to measure the average cost (to the information deliverer) in securing a booking. This technique was engaged by Urban Enterprise in 2008 in presenting a statistical summary of the efficiency of the Healesville VIC\(^{40}\) at securing tour bookings. The results of this analysis are shown in Figure 7.

**Figure 7 Healesville VIC Tour Booking Statistics 1/7/2007 - 30/6/2008**

<table>
<thead>
<tr>
<th>Total Number of Bookings</th>
<th>Total Cost</th>
<th>Average per Booking</th>
<th>Bookings Online (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>108</td>
<td>$28,611</td>
<td>$264.92</td>
<td>36.11%</td>
</tr>
</tbody>
</table>

Source: Yarra Valley Visitor Information Centre 2008

This technique has been expanded to examine the cost per booking across the entire operation of the Healesville VIC in 2011 - 12.

Each of three alternative visitor information delivery scenarios is then presented. In these alternative visitor information delivery scenarios, the costs and revenues associated with in-person delivery of visitor information at the Healesville VIC are removed from the analysis. Each scenario and the assumptions underlying that scenario are presented below.

**Scenario A - Healesville VIC, Website and Call Centre**

This scenario looks at the recent performance of the Healesville VIC in securing booking from telephone, website and in person enquiries and compares this to the cost of operating the VIC.

- Cost per booking is calculated by dividing the Healesville VIC 2010 – 2011 financial year operating expenses by the total 2010 – 2011 bookings.

**Scenario B - Healesville Visitor Information Street Ambassadors (VISA), Website and Call Centre**

In this scenario the Healesville VIC would be closed. All staff and volunteers would be positioned on Healesville’s main street and equipped with hand held (tablet) computers and mobile phones. The website would continue to be administered by Yarra Ranges Regional Marketing (from their offices or another location).

- It would still be necessary to provide a base office for the VISA program. This could be an agreement to use an existing community building e.g. library or it could be a small leased space. The cost of any lease is not factored in the scenario.

- Cost per booking is calculated by dividing the Healesville VIC 2010 – 2011 financial year staff expenses by the total 2010 – 2011 bookings.

\(^{40}\) Urban Enterprise (July 2010) Visitor Information Services Research
Scenario C - Website Only

In this scenario, the Healesville VIC is closed, its telephone enquiry function is not replaced elsewhere and the website would continue to be administered by Yarra Ranges Regional Marketing (from their offices or another location).

- It is assumed (conservatively) that use of the website for bookings does not increase following the hypothetical closure of the Healesville VIC. In reality, use would increase, further improving the cost effectiveness of this delivery option.

Scenario D - Wireless Hotspots, Website and Call Centre

In this scenario, the Healesville VIC is closed and 20 free wireless hot spots are installed by Yarra Ranges Regional Marketing at major visitor attractions, main streets and other locations in the Yarra Valley. The website and telephone enquiry call centre would continue to be administered by Yarra Ranges Regional Marketing (from their offices or another location).

- It is estimated that it would cost $19,500 to set up 20 wireless hot spots in the Yarra Valley. Annual maintenance and ADSL connection would cost $5,600\(^1\). This equates to a total annual cost of $6,575 if it is assumed that the hot spots would have to be replaced after 20 years.

- It is assumed that some of the wireless hotspots will be located in places where there are existing mobile phone and internet reception issues so as to improve overall wireless internet reception in the Yarra Valley.

- The cost of maintaining the website and fielding telephone enquiries includes an assumed human resourcing allowance of 25% of existing Healesville VIC staff salaries and wages.

- It is assumed that (at least) 13.3% of visitors who are in the Yarra Valley would use the wireless hot spots. This is based on a survey of how bookings were sourced to Yarra Valley tourism businesses\(^2\), which found that 13.3% of visitors booked accommodation and activities via mobile phone, mobile internet and fixed phone/internet while travelling.

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\(^1\) Communication with Got2bConnected \(\text{www.got2bconnected.com.au}\)

\(^2\) 2012 email survey of 28 Yarra Valley Tourism Association members (local businesses)
The results are shown in Figure 8 below.

**Figure 8** Cost Effectiveness and Market Exposure for Different Booking Platforms

<table>
<thead>
<tr>
<th></th>
<th>Scenario A</th>
<th>Scenario B</th>
<th>Scenario C</th>
<th>Scenario D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Operating Cost ($)</td>
<td>288,951</td>
<td>243,889</td>
<td>25,819</td>
<td>93,366</td>
</tr>
<tr>
<td>Annual Enquiries (no.)</td>
<td>241,413</td>
<td>241,413</td>
<td>241,413</td>
<td>-</td>
</tr>
<tr>
<td>Annual Bookings (no.)</td>
<td>3,074</td>
<td>3,074</td>
<td>3,074</td>
<td>495,292</td>
</tr>
<tr>
<td>Total Cost per Booking</td>
<td>$ 94.00</td>
<td>$ 79.34</td>
<td>$ 8.40</td>
<td>$ 0.19</td>
</tr>
<tr>
<td>Average value of Booking (2012)</td>
<td>$ 311.74</td>
<td>$ 311.74</td>
<td>No data</td>
<td>No data</td>
</tr>
</tbody>
</table>

Source: derived from available data by SGS Economics and Planning

Each of the scenarios in Figure 8 are based in part on a cost breakdown of the existing activities of the Healesville VIC. Scenario A presents the existing cost base for operating the Healesville VIC. Scenario B presents staff related expenses and offsite call centre and website management expenses - assuming that VIC staff and volunteers become street ambassadors and the existing VIC facility would cease to operate. Scenario C presents only costs associated with maintaining the Visit Yarra Valley website. Scenario D presents costs associated with setting up and maintaining a network of 20 Wi-Fi hot spots and also Healesville VIC based costs involved in managing a call centre and website.
2.9 Implications for a Tourism Hub

The evolving delivery of visitor information carries implications for the viability and practicality of focusing investment toward developing a single VIC within a tourism ‘hub’:

If there is sufficient evidence to show that alternative combinations of virtual and personal delivery platforms can field a similar or greater number of visitor enquiries and bookings at lesser cost, then the tourism centre concept is shown to be outmoded.

- The increasing co-location of VICs with other visitor attractors suggests that in-person delivery of information works best in locations where there is critical mass of visitors, lengthy duration of stop and multiple activities, as opposed to a standalone VIC.

- Lilydale presents limited options for such co-location. Figure 1 shows that Yarra Valley winemakers are widely dispersed but that few are located near Lilydale. Iconic regional attractions such as Puffing Billy Railway and Healesville Sanctuary are not located near Lilydale either. The presence of a significant attractor with which a VIC could co-locate would enhance the case for a Lilydale Tourism Hub.

- Given the visitor focus, exposure and accessibility (parking and connection to main roads) are critical location factors for visitor information facilities.

- Maroondah Highway, Lilydale, is a high access location but offers few suitable undeveloped sites. The extensive scale of commercial signage on Maroondah Highway would impinge on the effectiveness of progressive VIC signage such as that which advertises the Lara Service Centre VIC to passing traffic.

- The key roles of the VIC are promotion, referral, booking and transacting payment for visitor products and services. It has been shown that while there may be some advantage in co-locating or proximately locating complementary tourism support activities, it appears far from essential for most. Indeed, for most complementary/support activities, a lower rent/ lower exposure location may be more cost effective.

- The Tourism Hub concept relies in part on there being economies of scale in locating tourism support activities such as website maintenance and tourism marketing with a frontline VIC. This report finds that VICs seek high rent locations and that there are few practical benefits in locating these lower rent seeking activities with the VIC.

- While some VICs have taken a step away from being a public agency and toward providing a commercial booking service that is typically managed by paid staff, other VICs have consolidated as an enquiry only service and moved to smaller premises. In the case of street ambassadors, an enquiry only service can be run with minimal office ‘touch points’. It is useful to consider how cost effective the stand alone VIC is at providing information (a public good) when compared to alternative delivery platforms.

- In person fielding of enquiries and processing of bookings for visitors can be undertaken more cost effectively by a street ambassador programme than by a VIC.

- Staffing is the main annual cost for a VIC, despite the high number of volunteers engaged. If the operation of a built VIC is replaced by a similar size team of street ambassadors then the cost of generating bookings is reduced significantly.
The trend toward more cost effective delivery of visitor information and more effective utilisation of VIC ‘front of house’ space is evident in the many co-locations, and relocations of visitor information services documented in this report. The concept of a large standalone facility with a VIC as the central tenant is contra to this trend.

If in-person delivery of visitor information is unavailable, only a small proportion of the total visitor market will be ill-equipped to search online via mobile and fixed internet to make bookings while they travel. In ten years time, virtually everyone travelling through the Yarra Valley will be equipped to make online enquires and bookings during their trip.

With the visitor market having immediate online access to travel information as they journey, in-person visitor information services will only remain relevant if they are located where the visitor already wants to stop or has already stopped.

A tourism centre or ‘hub’ building represents a substantial initial and ongoing cost when compared to the development and maintenance of virtual information platforms, which may cost less than $10,000 to install in any one location.

A modular and relocatable centre located at a busy visitor attraction or retail/service hub could be installed for approximately $200,000. This presents a relatively low cost (and lower risk) opportunity to explore visitor interest in stopping on the Maroondah Highway to enquire and book tourism product.

A relocatable VIC also provides a base for accredited VIC staff to operate from during main street festivals and during events at commercial visitor attractions.

The Tourism Hub concept appears outmoded. Alternative virtual and physical visitor information delivery platforms appear to offer better opportunities for expanding or restructuring visitor information delivery in the Yarra Valley and Dandenong Ranges. The research indicates that permanent Visitor Information Centres are still needed, albeit in a different format where a location meets the following criteria:

- The site is prominent and offers good signage opportunity
- There is an existing pattern of visitor/local pedestrian and vehicle traffic
- Other visitor attractions are co-located or adjacent, and
- There is good vehicle and/or public transport access.

The remainder of this report investigates opportunities for revising the delivery of visitor information services in the region.
3 REVISING THE ROLE OF PHYSICAL VISITOR INFORMATION PLATFORMS

This section explores the case for retaining physical visitor information platforms in an electronic age. It examines the relative cost of delivery of different physical visitor information platforms and what proportion of visitors are expected to use and accept different delivery platforms.

3.1 The Benefits of Physical Delivery of Visitor Information

3.1.1 Connecting with Locals and Sharing Knowledge

For visitors, particularly those travelling alone or in a small travel party, seeking visitor information is an opportunity for contact with local people who themselves provide a cultural experience of a destination – through its inhabitants. Enquiries at VICs, tourism businesses, other businesses and with locals on the street all provide this opportunity.

Local knowledge affords the visitors with weighted recommendations on nature based and cultural experiences from a presumably informed advisor. Local knowledge can also enable the visitor to form a partial or complete itinerary with confidence that important attractions or activities are not missed. The visitor researching and booking an itinerary on the basis of brochures or online sources cannot easily gain access to informed recommendations.

Local knowledge may provide informed recommendations but there are no guarantees that information provided by tourism business operators is unbiased and non-solicited. For this reason, national VIC accreditation standards do not recognise business based information counters as official VICs. To safeguard the impartiality of advice offered to visitors, businesses and VICs could consider developing a partnership whereby VIC volunteers are stationed at selected tourism businesses at busy times.

It is important to note that even advice or booking recommendations provided by a VIC staffer or volunteer reflects underlying individual preferences. Some visitors choose to seek advice and recommendations from other travellers and locals who are not formally engaged in the visitor industry. The Trip Advisor website\(^\text{43}\) provides a virtual platform of unsolicited knowledge, whereby site users (travellers and locals) can post their review and recommendation of accommodation, attractions and food and beverage establishments. Savvy operators respond to all online feedback and reviews to show commitment to ongoing improvement and quality customer service.

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3.1.2 Informing Local Residents about Tourism Product

For the 11% of visitors who are catching up with friends and relatives while in the Yarra Valley, making connections with local people is probably less of a consideration\textsuperscript{44}. However, the local population who host VFR visitors may make enquiries at VICS, tourism businesses and other sources to gather information, such as maps and brochures, to provide to their visiting friends or relatives. Visitor information platforms must therefore also be accessible and understood by the local population.

3.1.3 Advocating Quality Tourism Products

The Yarra Valley is gradually diversifying from being synonymous with food and wine alone, to developing a profile in other emerging areas of visitor interest, including the arts. The region is home to many local artists and musicians, galleries, live music venues and cinemas including the Yarra Ranges Regional Museum, Burrinja Arts Centre, Upper Yarra Arts Centre and the newly refurbished Healesville Memorial Hall. The arts scene is continuing to attract tourists through hosting exhibitions, including the Archibald Prize Exhibition in 2011 at the Tarrawarra Museum in Healesville, and the Warburton Film Festival.

Complementing the wine experience in the region is the emerging microbrewery industry, which has grown considerably in recent years\textsuperscript{45}. In addition, farmers markets and buying produce from local farmers and dairies is becoming an increasingly popular activity for visitors.

For the visitor, the region offers an abundance of visitor product and in particular, food and wine related visitor product such as Farmgate tours, U-Pick and Farmgate trails. Independently navigating this offer and selecting products to experience or bypass, presents the visitor with the risk that they will miss out on the ‘best’ attractions. Personal interaction and endorsement from a local advocate (i.e. VIC employee or another business owner) can provide what is referred to as a ‘moment of truth’\textsuperscript{46} and give the visitor greater surety about their itinerary choices.

3.1.4 Advocating Emerging Tourism Products

The suppliers of new products generally have businesses which benefit more from intensive (in person) promotion and advocacy than more established businesses, which have established marketing and distribution networks.

The Yarra Valley is also the gateway for the Goulburn River Valley Tourism Region for visitors travelling north east via the Maroondah and Melba Highways from the Melbourne. This is an emerging tourism region and its product offering is of relatively low profile. Visitors planning an

\textsuperscript{44} Tourism Research Australia, October 2011, Regional Tourism Profiles 2010/11 viewed at: www.ret.gov.au/tourism/research/tra


\textsuperscript{46} Spinks, W. September 2003. Visitor Satisfaction with Themed Tourism Attractions Thesis Dissertation, University of the Sunshine Coast
itinerary to the Yarra Valley only may be encouraged to expand or extend their trip by including Goulburn River Valley activities in their itinerary.

A Victoria University study looked at VICs in regional NSW and Victoria and found 35% of respondents reported being encouraged to visit neighbouring regions on the basis of information provided by VICs\(^{47}\). Victorian VICs interviewed in this study reported that they promote surrounding regions and attractions, often along touring routes as well as promoting product in other states, specifically southern NSW, South Australia and Tasmania.

### 3.1.5 Providing Community Benefits

In addition to providing visitors with information, VICs provide an important community function by providing paid and volunteer employment opportunities, social interaction for VIC employees and volunteers. The role of a VIC as a promotional platform may actually be valued more by communities than by tourism businesses. This is supported by the fact that most opposition to VIC closures by councils in Great Britain has come not from the tourism industry but from local communities\(^ {48}\).

If visitor information platforms are to be rationalised or restructured in a region, it is important that due consideration is given to ways of preserving the needs of employees and volunteers who deliver these services – such as offering the role of roving ambassadors in town main streets or at events.

### 3.2 Constraints on Physical Delivery of Visitor Information to Particular Markets

As discussed in Section 2.9, within 10 years practically all visitors to the Yarra Valley will have access to high quality mobile or fixed line internet during their visit. Therefore there will be few constraints on the remote provision of visitor information (with the exception of a very small residual number of computer illiterate persons). The following constraints to physical delivery of visitor information have been identified.

#### 3.2.1 The Coach Market

Three companies (AAT Kings, APT Touring and Grayline) operate daily coach itineraries from Melbourne to the Yarra Valley. Paul Gorton of APT Touring\(^ {49}\) did not see a role for in-person delivery of visitor information at VICs to the coach market, except as a point of sale and promotion. For coaches to stop at a new VIC, the facility would need to either be attached to a

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\(^{49}\) Paul Gorman, APT Touring (telephone communication 28/03/2012) sightseeing@aptouring.com.au
major visitor attraction (e.g. Healesville Sanctuary) or be in a location where there is sufficient pick up/drop off demand for a staging point to be established (as is the case with Ringwood Station).

The existing preferences for visitor information delivery are demonstrated by the sources of Yarra Valley tourism business generation. These have been canvassed in the Yarra Valley Tourism Business Survey and are shown in Figure 9. The data suggests that in-person VIC referral is a minor source of business origination when compared to telephone and web enquiries to tourism businesses.

### 3.2.2 Yarra Valley Cycle Visitors

Lilydale to Warburton Rail Trail cyclists have limited exposure to the main traffic thoroughfare (Maroondah Highway). The Lilydale to Warburton Rail Trail diverges from the Maroondah Highway at Lilydale and joins the Warburton Highway at Seville. Cyclists typically travel in groups and plan their itineraries in advance to ensure they can complete their assigned distances. For this reason they are unlikely to constitute significant VIC walk-ins.

Cyclists would be minor users of structured in-person visitor information services. Cyclists already receive visitor services from businesses at which they choose to service their bike or provision themselves. For example, Yarra Valley Cycles provides a Lilydale – Warburton rail trail window display, distance information and maps to customers50.

### 3.2.3 Foreign Language Markets

In person delivery of visitor information to foreign language speaking visitors is limited by the language capability of the information delivering staff or volunteer.

Compared to domestic visitors, only a small number of international visitors use the Healesville VIC and this may reflect in part avoidance of in-person enquiries by non English speaking markets. It would be a major undertaking for a VIC to provide brochures and information in other languages, considering that the target market is small and may be more cost effectively provided for by remote visitor information platforms.

A study which investigated the experience of Chinese tourists found that of those aspects of their Victorian holiday experience that they were dissatisfied with, ‘insufficient information in Chinese language’ appeared low on the list51. This further supports the notion that visitor information provision to this market can be satisfactorily achieved through use of foreign language websites, and applications on mobile devices that can translate information provided in English.

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50 Communication with Ashley Swann, Owner Manager of Yarra Valley Cycles 11/12/12
51 Weiler, B and Yu, X (2006) Understanding Experiences of Chinese Visitors to Victoria, Australia, CRC for Sustainable Tourism
3.3 Preferences for Visitor Information Delivery Media

Figure 9 demonstrates that visitors to Yarra Valley tourism businesses show a high degree of pre-trip planning. Internet and telephone enquiries (direct to businesses) dominate pre-trip planning. Those visitors who have sought out in-person delivery of visitor information from friends and family, tour hosts and visitor information centres are not necessarily any less able to receive this information through remote platforms.

**Figure 9: Business Origination via Different Modes of Enquiry**

![Bar chart showing modes of enqury](source: Yarra Valley Business Survey)

Figure 10 also presents findings from the Yarra Valley Business Survey\(^{52}\) and illustrates how business originates for each business category. It shows that:

- Visitors make most of their enquiries prior to departure (purple, aqua and orange bars).
- Accommodation provider businesses attribute around half of their business to enquiries made prior to travel (phone enquiries, email enquiries or through their website).
- VICs contribute mainly to business generation in the cultural heritage attraction category (an emerging market).

\(^{52}\) 2012 email survey of 28 Yarra Valley Tourism Association members (local businesses)
Across accommodation businesses surveyed, on average, 21% of bookings were being generated from en route independent enquiries that they received (phone, email, walk-in).

Accommodation respondents indicated that on average 24% of their business was generated by VICS.

By comparison, activity and attraction businesses (not offering accommodation) reported that on average 34% of their business was generated by en route enquiries. However, businesses reported that, on average, only 7% of their business was generated by VICS (this ranged from 1% to 30% out of a sample of only nine non accommodation businesses).

**Figure 10: Modes of Enquiry and Business Type**

The Yarra Valley Business Survey collected data on modes of enquiry that visitors made regarding 28 Yarra Valley businesses. While the sample size of this research is small, the findings are consistent with the findings of South Australian research which show a strong role for pre bookings and pre travel enquiries for accommodation product.

**Source:** Yarra Valley Business Survey 2012

The Yarra Valley Business Survey collected data on modes of enquiry that visitors made regarding 28 Yarra Valley businesses. While the sample size of this research is small, the findings are consistent with the findings of South Australian research which show a strong role for pre bookings and pre travel enquiries for accommodation product.

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53 *Destination Visitor Survey – South Australia: The Impacts of Regional Visitor Information Centres on Visitor Behaviour in South Australia,* Tourism Research Australia, Canberra.
3.4 Implications

- Foreign language markets, the coach market and cyclists are likely to be minor walk-in users of in-person visitor information platforms but can be catered for by online promotion and booking platforms tailored to their needs.

- Research indicates that after departure and before arrival at their destination, travellers primarily use VICs to book attractions and activities. There is opportunity for in-person delivery of visitor information to assist travellers in choosing activities and attractions by providing targeted visitor information that helps profile emerging product.

- Existing VICs therefore appear to be underperforming at referring and selling activity and attraction product in the YVDR.

- While a relatively cost ineffective mode of visitor information delivery, there are other reasons for VICs to exist. VICs enable proactive targeting of emerging products to niche markets. VICs provide an outlet for community volunteerism and the sharing of visitor product knowledge with locals.

- The high number of bookings through wireless hot spots shown in Figure 10 does reflect in part, existing mobile technology users shifting from using paid mobile internet and phone services to using the hot spots. However this also reflects online enquiries and bookings by international visitors who presently cannot access ‘pay for service’ mobile internet coverage in the Yarra Valley and Dandenong Ranges.
4 A PLAN FOR FUTURE YARRA VALLEY VISITOR INFORMATION DELIVERY

This section translates the findings from Section 3 into a recommended mix of existing and new visitor information platforms across the Yarra Valley.

4.1 Location of Visitor Information Platforms

4.1.1 Catering to visitors travelling by car

Research has established that the Yarra Valley is overwhelmingly a drive market. Of domestic daytrip visitors to the Yarra Ranges municipality, almost all (91%) are from Melbourne, while the remainder are from other locations in Victoria. Of these visitors, the overwhelming majority arrive by car (97%), while the remainder arrive by bus or coach (2%) or rail (to Lilydale) (1%). Of domestic overnight visitors to the municipality, most arrive by car (79%). The remaining visitors arrive by air (9%), rail (5%), bus or coach (2%), rented or hire transport (2%), or other transport (3%)\(^{54}\).

A survey of visitors to the Yarra Valley\(^{55}\) supports the data presented in Section 4 of this report, showing that the Melbourne market is the biggest single market for the Yarra Valley (see Figure 11 which shows the number of visitors arriving via each possible route).

Figure 11: How Visitors Access the Yarra Valley

\(^{54}\) Urban Enterprise, Visitor Information Services Research Study (2009)

\(^{55}\) Department of Hospitality, Tourism and Event Management, Swinburne University, Yarra Valley Visitor Survey 2010 Data Analysis
The survey found that most visitors arrived via the Maroondah Highway, while a smaller number arrive via Eltham-Yarra Glen Road, the Warburton Highway from the east, Melba Highway from the north and the Maroondah Highway from the north east.

The results of a Yarra Ranges Council Visitor Information Services Strategy survey\textsuperscript{56} show that 43% of visitors travelling by car are travelling as couples. When family and multi person car travel are also considered, it is therefore reasonable to assert that few leisure visitors to the Yarra valley are lone drivers.

With the exception of the small number of lone drivers, all of these visitors can potentially access online internet, or make mobile telephone enquires while travelling, provided that a mobile phone or wireless broadband signal is available on the route they are travelling. Lone drivers who have GPS can also potentially access visitor product information on software updated GPS monitors.

4.1.2 Physical delivery of visitor information in high traffic areas

When the role of remote visitor information in meeting the specific demands of visitors is considered, it stands to reason that the role of physical information delivery should be to generate awareness of new and merging visitor products on the part of both visitors and local residents. To achieve this effectively, Visitor Information Centres and other staffed visitor information platforms benefit from having high visibility and being located in towns and at major tourist attractions where a large number of visitors will stop, park a car, explore on foot and will be exposed to visitor information providing staff and volunteers.

\textsuperscript{56} Ibid
Table 3 shows that compared to other VICs in Victoria, the Healesville VIC attracts a smaller number of walk in visitors but a relatively high number of phone and email enquiries. Most VICs require council funding because they do not make an operating profit from their sales activities. The Healesville VIC presents a different model whereby it operates with the assistance of industry contributions (membership fees) and without ongoing council subsidies. Notwithstanding the relative success of the Healesville VIC, the undeniable implication is that VICs are largely ineffective in capturing visitors while they are travelling.

Taking ownership or lease of a relocatable VIC will also give Yarra Ranges Business Tourism the ability to test the effectiveness of physical delivery of visitor information at a number of public and private sites within the region. Depending on the success of the relocatable VIC at attracting enquiries and bookings, these sites can then be prioritised for more permanent visitor information infrastructure.

### Table 3: Comparison of VIC Visitation

<table>
<thead>
<tr>
<th></th>
<th>Walk In Visitors</th>
<th>Visitors to Region</th>
<th>%</th>
<th>Enquiries via Phone</th>
<th>Enquiries via Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorne</td>
<td>178,054</td>
<td>27,572,600</td>
<td>1%</td>
<td>14,684</td>
<td>2,530</td>
</tr>
<tr>
<td>Woodend</td>
<td>155,365</td>
<td>1,879,500</td>
<td>8%</td>
<td>3,068</td>
<td>425</td>
</tr>
<tr>
<td>Castlemaine</td>
<td>114,269</td>
<td>4,822,100</td>
<td>2%</td>
<td>1,318</td>
<td>1,544</td>
</tr>
<tr>
<td>Daylesford</td>
<td>89,874</td>
<td>1,879,500</td>
<td>5%</td>
<td>4,744</td>
<td>286</td>
</tr>
<tr>
<td>Mansfield</td>
<td>49,381</td>
<td>2,321,400</td>
<td>2%</td>
<td>44,941</td>
<td>5,668</td>
</tr>
<tr>
<td>Swan Hill</td>
<td>47,817</td>
<td>4,514,100</td>
<td>1%</td>
<td>33,843</td>
<td>39</td>
</tr>
<tr>
<td>Dromana</td>
<td>39,743</td>
<td>4,360,100</td>
<td>1%</td>
<td>19,760</td>
<td>13,229</td>
</tr>
<tr>
<td>Hamilton</td>
<td>38,391</td>
<td>1,450,700</td>
<td>3%</td>
<td>8,449</td>
<td>119</td>
</tr>
<tr>
<td>Shepparton</td>
<td>36,908</td>
<td>4,514,100</td>
<td>1%</td>
<td>11,210</td>
<td>1,876</td>
</tr>
<tr>
<td>Corryong</td>
<td>36,233</td>
<td>4,514,100</td>
<td>1%</td>
<td>1,879</td>
<td>149</td>
</tr>
<tr>
<td>Horsham</td>
<td>29,777</td>
<td>1,450,700</td>
<td>2%</td>
<td>2,391</td>
<td>104</td>
</tr>
<tr>
<td>Colac</td>
<td>29,284</td>
<td>27,572,600</td>
<td>0%</td>
<td>3,787</td>
<td>142</td>
</tr>
<tr>
<td>Korumburra</td>
<td>27,182</td>
<td>3,967,400</td>
<td>1%</td>
<td>5,911</td>
<td>182</td>
</tr>
<tr>
<td>Healesville</td>
<td><strong>21,865</strong></td>
<td><strong>3,418,400</strong></td>
<td>1%</td>
<td><strong>8,560</strong></td>
<td><strong>3,630</strong></td>
</tr>
</tbody>
</table>

Source: Urban Enterprise\(^{57}\).
While email and phone enquiries to the Healesville VIC are relatively high compared to other VICs (and are increasing), the Healesville VIC is attracting a small proportion of walk in visitors. This suggests that the VIC is not in an optimum location and that either the building or the staff and volunteer activities within the building should move. As a more cost effective option than operating a VIC, in-person delivery of visitor information by street ambassadors could also enable specific visitor information messages to be targeted at a broader audience. This audience includes persons who are not actively seeking information but who could make more informed trip planning choices if information is offered.

A 2010 discussion paper\textsuperscript{58} prepared for Yarra Ranges Regional Marketing acknowledges the importance of focusing in person visitor information resource to high traffic locations. The paper identifies a hierarchy of visitor information delivery platforms that could be developed in the Yarra Valley. The first tier consisted of existing VICs that offered free wireless hot spots. The second tier involved point of sale information displays and free wireless hot spots at high traffic visitor attractions. A third tier involved minor point of sale at small attractions, cellar door sales and accommodation providers.

Yarra Ranges Regional Marketing has recently explored the development of low cost forms of in-person visitor information delivery. An Ambassador Shop Programme is presently being investigated whereby frontline (sales) staff at major visitor attractions are trained to deliver information on whole of region accommodation activities and other attractions\textsuperscript{59}.

\textsuperscript{58} Sampson Marketing Services, 2010, \textit{Visitor Information Services in the Yarra Valley}, Draft Discussion Paper

\textsuperscript{59} Communication with Mark Challis, Yarra Ranges Regional Marketing, 29/08/12
4.1.1 Capitalising on existing public infrastructure

Local Government provides personalised community services to residents in the form of public libraries, public sporting and cultural facilities. In some of these facilities, there may be underutilised staff resources or underutilised space. There are some opportunities to incorporate visitor information platforms into the items of public infrastructure.

While most of these facilities are used predominantly or exclusively by residents and not by visitors, keeping residents informed about tourism product options will translate into resident patronage of local attractions and activities, and enhance the ability of residents to recommend trip itineraries to their visiting friends and relatives.

It needs to be acknowledged that there are some barriers to utilising community facility staff to deliver visitor information. Staff and volunteers in community facilities often have specific skill sets. Past experience of integrating library services has shown that in general encumbering community service workers with information service delivery tasks will compromise the standard of information delivery when compared to a dedicated model60.

Community facilities staff who already field impromptu public enquiries are probably best poised to take on physical visitor information delivery duties in addition to their regular responsibilities. The facilities in which these staff are located include:

- Local Government Community Service Centres
- Citizens Advice Bureaux
- Libraries (information desk staff)
- Cultural Facilities (Museums, Art Galleries, Performing Arts Centres)

Physical visitor information provision in these facilities may not require additional dedicated space, but could be provided at the existing enquiry or reception counters. In addition to physical visitor information delivery, community facilities can also host static displays of visitor information.

Yarra Ranges Regional Museum

The Yarra Ranges Regional Museum is a new Council facility that opened in Castella Street Lilydale in May 2011. The Museum incorporates exhibition galleries and function spaces. The Museum is presently open six days per week, closed on Mondays. In keeping with a community funding model, admission to the exhibition area is free. Yarra Ranges Council marketing and cultural planning co-ordinator Mark Morgan – Dethick61 has identified that Museum reception staff have the capacity to field general information enquiries from Museum visitors in addition to providing information about the Museum and its events.

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61 Communication with Mark Morgan – Dethick, Marketing and cultural planning co-ordinator, Yarra Ranges Council 27/08/12
4.2 Recommendations for visitor information delivery platforms in the Yarra Ranges

Considering the findings in Sections 3 and 4, implications for visitor information delivery platforms for the Yarra Valley have been identified as follows:

- The major highway routes leading into and out of the Yarra Valley should be the focus of improvements to commercial mobile phone and broadband reception. The opportunity for destination managers to partner with a network provider and subsidise the establishment of a continuous corridor of mobile phone and broadband reception along major highway routes should also be investigated.

- A site on the Maroondah Highway Lilydale should be included in a trial of the effectiveness of a relocatable VIC in attracting in-person visitor enquiries and bookings. This trial will need to include the repositioning of the removable VIC to several public and private sites to evaluate what features of site and surrounds attract visitors most effectively.

- In high foot traffic public locations (e.g. Healesville main streets), additional in-person visitor information delivery should be met by street ambassador programs rather than by additional purpose built (sole purpose) VIC facilities.

- Frontline staff in key tourism businesses (such as Puffing Billy Railway and Healesville Sanctuary) should be trained as ambassadors for the broader regional tourism offering.

- Staff at council service centres, community libraries and community cultural attractions should also be trained to respond to tourism product enquiries from visitors and residents.

- Free wireless broadband should be established in high visitor traffic locations including the location of existing VICs, township main streets, and major visitor attractions. Broadband users could be automatically directed to the Visit Yarra Valley website as they log in. Destination managers would be responsible for the entire cost of establishing these free wireless hot spots at VICs and main street locations. Visitor attractions would be expected to contribute most of the cost of establishing these hot spots at their business.

- This report does not make recommendations for the future of the stand alone Healesville and Warburton VICs except to outline that in-centre delivery of visitor information and bookings is cost ineffective compared to alternative in-person and virtual platforms.

- The co-location of VICs with privately managed visitor attractions is a growing trend in Australia. The development of a purpose built tourism ‘hub’ containing a VIC should be supported only if the VIC component of this hub is a secondary consideration to a commercial visitor attraction. Therefore in the absence of any pre-existing expression of interest this report does not presuppose a location for a ‘hub’
4.3 A Plan for Yarra Ranges Visitor Information Delivery

Based on the recommendations in sub section 4.2, the development of the following visitor information platforms for the Yarra Valley should be further investigated:

- Improvements to mobile telephone and high speed mobile broadband coverage to create a continuous network of uninterrupted coverage:
  - Along the Maroondah Highway from Lilydale to the eastern municipal boundary at the Black Spur Range;
  - On the Melba Highway from Yarra Glen to Dixon’s Creek;
  - On the Warburton Highway from Lilydale to Reefton;
  - On the Healesville – Koo Wee Rup Road between Healesville and Woori Yallock;
  - On Don Road between Healesville and Launching Place; and
  - On the Healesville – Yarra Glen Road.

- The establishment of 20 free wireless hotspots at:
  - Seven main street locations in Yarra Valley town centres; and
  - 13 Yarra Valley visitor attractions.

- The training of front line staff as tourism ambassadors at:
  - Selected community facilities; and
  - Selected Yarra Valley visitor attractions.

- The redirecting of some staff hours from the Healesville VIC to a street ambassador function in Healesville’s main street.

- The trialling of a small relocatable VIC in selected locations to include Maroondah Highway, Lilydale.

A spatial representation of this plan is shown in Figure 12 on the following page.
Figure 12  Future YVDR Visitor Information Platforms

Source: SGS Economics and Planning
5 MEASURING VISITOR INFORMATION DELIVERY SUCCESS

This section outlines how the success of the proposed mix of visitor information delivery platforms can be measured, given the roles it needs to fulfil.

The operation of visitor information delivery platforms should contribute to the realisation of local economic development outcomes for the region. Tourism specific development outcomes for Victoria’s regions are expressed in the Regional Tourism Action Plan 2009 – 2012. Success against these outcomes can be measured by the following VIC performance indicators:

<table>
<thead>
<tr>
<th>Outcome Sought</th>
<th>Performance Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased visitor yields</td>
<td>Increasing daily visitor expenditure in the YVDR region (monitor from YVDR Campaign Region market profile).</td>
</tr>
<tr>
<td>Improved efficiency of visitor information delivery</td>
<td>Reduction in the total cost of securing a booking. Reduction in the average length of telephone enquiry conversations about visitor product (where a booking is not secured).</td>
</tr>
<tr>
<td>Increased mid week visitation and smooth occupancy peaks and troughs</td>
<td>Average accommodation occupancy rates (measure from commercial accommodation data, ABS).</td>
</tr>
<tr>
<td>Increasing consumer demand for regional experiences</td>
<td>Increasing multi-day itineraries in the YVDR (measure as VIC booking of overnight stays or multi day itineraries for enquirers. VIC performance can also be compared against trends in domestic and international overnight visitation to the region).</td>
</tr>
<tr>
<td>Improved dispersal of visitors throughout the Yarra Valley.</td>
<td>Diversification of visitor itineraries (measure by tracking whether the opening of the VIC impacts on the ratio of visits to selected core products (e.g. wineries) compared to emerging products (e.g. spa and well being).</td>
</tr>
<tr>
<td>Increased length of stay</td>
<td>Increased total visitor nights and increased number of day trip visits to the region</td>
</tr>
<tr>
<td>Improving the supply of tourism experiences</td>
<td>Growth in product inventory (measure over time as the number of local tourism related businesses imputed into the VIC booking system or advertising in centre).</td>
</tr>
<tr>
<td><strong>Outcome Sought</strong></td>
<td><strong>Performance Indicator</strong></td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Improving the quality of tourism experiences</td>
<td>Visitor satisfaction surveys and feedback (measure satisfaction of visitors with VIC and product experiences separately but concurrently)</td>
</tr>
<tr>
<td>Improving regional industry structures</td>
<td>Reduced reliance on volunteers (measure as a % of VIC workforce).</td>
</tr>
<tr>
<td></td>
<td>Increased participation of tourism businesses in RTA and LTA, following the opening of the VIC (measure as membership of Yarra Ranges Business &amp; Tourism).</td>
</tr>
<tr>
<td>Addressing skills and service standards</td>
<td>VIC staff performance standards (measure by external audit e.g. mystery shopper).</td>
</tr>
</tbody>
</table>
6 ACTION AGENDA

The following table outlines recommended actions to be coordinated by the Project Steering Group as a follow up to the findings of this report. Suggested timing for these actions is within the 2013 calendar year.

<table>
<thead>
<tr>
<th>Action</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Findings:</strong></td>
<td>1</td>
</tr>
<tr>
<td>Present the key findings from this report to the Minister and recommend against further scoping of a Lilydale tourism hub concept unless new key visitor attractors are established in Lilydale and only if a smaller VIC has the potential to co-locate with these attractors.</td>
<td></td>
</tr>
<tr>
<td><strong>Network of Wi-Fi hot spots in Yarra Ranges:</strong></td>
<td>2</td>
</tr>
<tr>
<td>Gather and evaluate detailed set up and maintenance costs for a network of free to use Wi-Fi hot spots.</td>
<td></td>
</tr>
<tr>
<td><strong>Street Ambassador Program:</strong></td>
<td>3=</td>
</tr>
<tr>
<td>Develop a concept for a street ambassador program including locations served and built infrastructure required (e.g. demountable kiosks). Determine operating costs, operating cost savings and an estimated impact of the program on total visitor expenditure in the region.</td>
<td></td>
</tr>
<tr>
<td><strong>Business Ambassador Program:</strong></td>
<td>3=</td>
</tr>
<tr>
<td>Investigate the impact of ‘business ambassador programs’ on increasing overall and host business revenues in other tourism regions in Australia or overseas. Develop a concept for a business ambassador program including: businesses to be invited to participate; whether business staff or VIC volunteers would provide information at participating businesses; program name and branding and responsibility to fund the program.</td>
<td></td>
</tr>
<tr>
<td><strong>Mobile/Relocatable Visitor Centre:</strong></td>
<td>3=</td>
</tr>
<tr>
<td>Develop a concept and concept sketch for a mobile/demountable VIC that can be assembled at major events and other high traffic locations. Further contact with Elizabeth Curtain about Geelong’s experience in developing a demountable visitor centre should inform this process. Purchase or lease a relocatable VIC and trail its success in attracting in-person enquiries at selected locations.</td>
<td></td>
</tr>
<tr>
<td><strong>Change Management Strategy:</strong></td>
<td>5</td>
</tr>
<tr>
<td>For paid staff and volunteers who are familiar with working in the Healesville VIC, the transition to working offsite as a street ambassador, business ambassador or mobile VIC worker may be stressful. Staff may require further coaching to assist them with this transition. A change management strategy should be developed to outline practical approaches to assist staff with this transition and to inform staff of why the market is demanding this transition.</td>
<td></td>
</tr>
</tbody>
</table>
## APPENDIX

### Visitor Information Centre Case Studies

#### Mildura Visitor Information Centre

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overarching goal of the VIC</strong></td>
<td>• Economic growth</td>
</tr>
<tr>
<td></td>
<td>• Provide options that will extend visitor stay and encourage visitors to see attractions that they had not planned to see</td>
</tr>
<tr>
<td></td>
<td>• To exceed expectations</td>
</tr>
<tr>
<td></td>
<td>• Increase spending in local accommodation and attractions.</td>
</tr>
<tr>
<td><strong>Key services provided by VIC</strong></td>
<td>• Work closely with Mildura Tourism and local Council</td>
</tr>
<tr>
<td></td>
<td>• Visitor information – maps, brochures (for Mildura, Victoria, Southern NSW, South Australia)</td>
</tr>
<tr>
<td></td>
<td>• Interpretative area – interactive displays including an iPad with Auslan system</td>
</tr>
<tr>
<td></td>
<td>• Theatrette – seats 50 people and shows two free presentations that run throughout the day. This is popular with coach tours (1-2 per week).</td>
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<tr>
<td></td>
<td>• Audio guide for AUSLAN visitors – can download audio guide onto own Android phone (or borrow one from the VIC) which covers the main attractions</td>
</tr>
<tr>
<td></td>
<td>• Touch screen</td>
</tr>
<tr>
<td></td>
<td>• Bookings (via BookEasy) – accommodation, tours, coach</td>
</tr>
<tr>
<td></td>
<td>• Ticketing for local events – online and manual</td>
</tr>
<tr>
<td></td>
<td>• Souvenir shop – merchandise (clothing, ornaments etc), local produce (olive oils, salts, preserves etc). The souvenir shop does well as there are not many other souvenir shops in Mildura.</td>
</tr>
<tr>
<td></td>
<td>• Box office ticketing (online and manual) – e.g. local arts centre productions, food and wine events. This service is used mainly by the local market rather than visitors.</td>
</tr>
<tr>
<td><strong>Evolution of key services</strong></td>
<td>• Until 14 years ago the VIC was run out of a kiosk in town. It then increased its function to include a manual booking service, which then evolved to become electronic.</td>
</tr>
<tr>
<td></td>
<td>• Most tourist operators are now on BookEasy and the VIC makes most bookings via this method.</td>
</tr>
<tr>
<td><strong>How are services likely to change in the future?</strong></td>
<td>• More events bookings</td>
</tr>
<tr>
<td>Question</td>
<td>Response</td>
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</tr>
<tr>
<td>How has the means for delivering these key services changed over time?</td>
<td>- In the process of creating an App with Mildura Tourism and BookEasy. The App will include a booking system and will include lists of accommodation, restaurants and things to do in the area. The VIC hopes that this will attract a younger demographic (main market is currently 45+ years who have a preference for paper based information).</td>
</tr>
<tr>
<td></td>
<td>- Plasma screens are located throughout the shared VIC building (such as in the cafe) promoting local events and attractions. These are displayed via a computer and PowerPoint presentation.</td>
</tr>
<tr>
<td></td>
<td>- VIC and local events are promoted on local radio (mainly to reach the local market). The VIC and Mildura Tourism host events for locals e.g. ‘Be a tourist in your own town’ which encourage locals to visit local attractions by offering free or reduced entry</td>
</tr>
<tr>
<td>How is it likely to change in the future?</td>
<td>- May provide interactive touch screen tables in the next few years. These tables include a function where an itinerary can be loaded from the table onto a smart phone.</td>
</tr>
<tr>
<td></td>
<td>- May introduce more touch screen terminals</td>
</tr>
<tr>
<td></td>
<td>- More electronic interactive displays e.g. flora and fauna displays.</td>
</tr>
<tr>
<td>What are the key functional characteristics of the VIC?</td>
<td>- The VIC shares a purpose built building with the Mildura Library, and a swimming pool complex which houses a cafe. The VIC and other facilities share an entrance way which around 50,000 people per month pass through. Local events are advertised in this shared entry.</td>
</tr>
<tr>
<td></td>
<td>- A minimum of three staff work in the VIC each day</td>
</tr>
<tr>
<td></td>
<td>- The customer service area of the VIC is approximately 650 square metres, the VIC office at the back is approximately 50 square metres</td>
</tr>
<tr>
<td></td>
<td>- The VIC has one desk that takes all bookings</td>
</tr>
<tr>
<td>What are the key location characteristics of your VIC?</td>
<td>- VIC is in town on a main road</td>
</tr>
<tr>
<td>What are key success factors for VIC effectiveness?</td>
<td>- Location – anyone entering town on a main road will pass the VIC</td>
</tr>
<tr>
<td></td>
<td>- VIC has a good relationship with stakeholders including Mildura Tourism and local industry to offer a range of different services</td>
</tr>
<tr>
<td></td>
<td>- Offering an instant booking service reduces risk of visitors not booking for themselves</td>
</tr>
<tr>
<td>Question</td>
<td>Response</td>
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</tr>
<tr>
<td><strong>Commission received from bookings reduces pressure for funding</strong></td>
<td><strong>VIC has good relationship with local events and successfully leverages these to make accommodation bookings (via mobile VIC and laptop with BookEasy system)</strong></td>
</tr>
<tr>
<td>How is performance measured at your VIC?</td>
<td><strong>Statistics, visitor numbers, booking numbers etc</strong>&lt;br&gt;<strong>VIC KIT survey tool – converts customer survey responses into readable tables and results via excel. VIC finds this tool very valuable. Shows influence on visitor yield, time stayed in region etc.</strong></td>
</tr>
</tbody>
</table>

### Korumburra Visitor Information Centre

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
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</thead>
<tbody>
<tr>
<td><strong>Overarching goal of the VIC</strong></td>
<td><strong>Providing excellent customer service - face to face, phone and email</strong>&lt;br&gt;<strong>To promote the region and surrounding areas</strong></td>
</tr>
<tr>
<td><strong>Key services provided by VIC</strong></td>
<td><strong>Provide brochures and maps for Gippsland as well as other surrounding regions, other regions in Victoria and interstate (namely Tasmania, SA and NSW as these are on the Sydney – Melbourne coastal route). Being an accredited VIC it should provide info on other regions.</strong>&lt;br&gt;<strong>Provides accommodation booking service for Gippsland - online</strong>&lt;br&gt;<strong>Assists in marketing material and website maintenance (works closely with the Shire)</strong>&lt;br&gt;<strong>Does not provide tour booking service but may in future if interest from tour companies (although there are not a lot operating in South Gippsland). Provides information on tours.</strong>&lt;br&gt;<strong>No interactive information within the VIC</strong></td>
</tr>
<tr>
<td><strong>Evolution of key services</strong></td>
<td><strong>More of an online presence</strong>&lt;br&gt;<strong>Provide an online monthly events calendar</strong>&lt;br&gt;<strong>Assist in regional marketing</strong>&lt;br&gt;<strong>Two VICs as at November 2008</strong>&lt;br&gt;<strong>New booking service with online component</strong>&lt;br&gt;<strong>Website evolution - both information/content and increase in user friendliness</strong>&lt;br&gt;<strong>Merchandise outlet has grown (although still small - Australiana, books etc)</strong>&lt;br&gt;<strong>First attempt at being booking agent for food and wine festival</strong></td>
</tr>
<tr>
<td>Question</td>
<td>Response</td>
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</tbody>
</table>
| How are services likely to change in the future?                        | • May become booking agent for tours  
• Booking agent and ticketing for regional events  
• Move to a more web based system                                                                                     |
| How has the means for delivering these key services changed over time?  | • More functions to online booking services  
• Is now more web based                                                                                                       |
| How is it likely to change in the future?                               | • Creating Smartphone apps (with Regional Tourism Association) - bar codes etc  
• Website upgrades                                                                                                           |
| What are the key functional characteristics of the VIC?                 | • Korumburra VIC - shared with Coal Creek. The VIC and Coal Creek work in conjunction but have two different service desks  
• Foster VIC - in foyer of stockyard galleries  
• Both VICs are open 7 days a week from 9-5pm (closed Christmas Day)  
• Co-location has helped to increase visitor numbers                                                                       |
| What are the key location characteristics of your VIC?                  | • Korumburra VIC - located in outskirts of town, towards Leongatha (off the main highway)  
• Foster VIC - on town on main road                                                                                           |
| What are key success factors for VIC effectiveness?                     | • Good customer service  
• Have had good marketing opportunities for Gippsland - the Regional Tourism Association has grown over time and opportunities have increased allowing the region to become more 'on the map' - has allowed exploration of different avenues |
| How is performance measured at your VIC?                                | • Use statistics (visitor numbers, phone enquiries etc) to provide to Council to 'show their worth' however they note that these can be heavily influenced through fire, floods etc, AUD$ etc  
• Audit results - maintain a high rating  
• Maintain excellent customer service (as an 'old school' VIC still reliant of face to face contact this is very important) |

Mansfield Visitor Information Centre

<table>
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<tr>
<th>Question</th>
<th>Response</th>
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</thead>
<tbody>
<tr>
<td>Overarching goal of the VIC</td>
<td>• To provide high quality information to visitors to the region and a high level of service</td>
</tr>
</tbody>
</table>
| Key services provided by VIC                                            | • Information provision – maps, brochures, visitor guides, }
<table>
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<tr>
<th>Question</th>
<th>Response</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>information sheets (short walks, townships etc), what’s on calendar, Mt Buller info (on and off mountain)</td>
</tr>
<tr>
<td></td>
<td>The reservations centre (Mansfield-Mt Buller High Country Reservations) is a separate business located with the VIC. Bookings can be made through this centre for accommodation, activities, packages, tours, transport, ski passes (and snow gear hire, ski lessons).</td>
</tr>
<tr>
<td></td>
<td>Store selling merchandise – maps, souvenirs, magnets, books etc. Doesn’t sell local produce but would like to in the future.</td>
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<td></td>
<td>Interpretive centre – video/projector on the history of the area (seats around 30 people)</td>
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<td></td>
<td>The coach tour market is not a major market for the VIC i.e. coaches do not frequently stop there</td>
</tr>
<tr>
<td></td>
<td>The centre also has a feature art piece and pictures of local identities – these create talking points and add value to the VIC</td>
</tr>
</tbody>
</table>

**Evolution of key services**

|   | Increasing importance of technology – visitors now have a ‘book now’ mentality. Visitors now do a lot of research before travelling. |
|   | Therefore, of growing importance is responding to how to provide information to visitors before they arrive at a VIC i.e. how to provide information to people that won’t physically visit the centre, but will gather information before visiting the region. |

**How are services likely to change in the future?**

|   | Technology use will continue to grow – need to become proactive rather than reactive |
|   | Visitor expectations have changed with regard to information provision |
|   | Although there will always be a need for a friendly face and local knowledge that cannot be provided online |

**How has the means for delivering these key services changed over time?**

|   | Has moved to include more technology and towards online services and information |
|   | The VIC has a data tracks machine (is located inside the VIC during the day but provides after hours information) |

**How is it likely to change in the future?**

|   | The VIC is interested in offering a phone app in the future |
|   | Update web content to include video content, rather than just having static information |
|   | Interested in providing an interactive trip planner/itinerary – visitor would identify activities they like doing and a suggested itinerary would be computer generated |

**What are the key functional characteristics of the VIC?**

<p>|   | The VIC is privately run and is a not for profit organisation. |</p>
<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
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</table>
| **What are the key location characteristics of your VIC?** | • Located on a main road – Maroondah Highway  
• The VIC is located within the railway precinct which includes a restored station  
• The VIC is the main reason why visitors come to the precinct (i.e. they come to the VIC and then might look at the station)  
• The VIC is located along the rail trail |
| **What are key success factors for VIC effectiveness?** | • Service – the VIC has a dedicated and knowledgeable team of paid staff (no volunteers). Staff are long term and there is low staff turnover. Staff have a deep knowledge of the area and product.  
• The VIC works very closely with the wider community which allows the VIC to gain a deep level of understanding and information and local networks.  
• Location – the VIC is in a very visible location and is well signed along the highway and in town |
| **How is performance measured at your VIC?** | • VIC – number of visitors, calls, emails, service levels (e.g. phone answered within a certain number of rings)  
• Reservation centre – number of calls and bookings, revenue, service levels. |
| **Recommendations for a best practice VIC** | • Can’t specify one, however it is important that a the primary feature of a VIC is function, rather than design |

**Victoria Tourism and Industry Council**

<table>
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<th>Question</th>
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</table>
| **What are the key services provided by VICS?** | • Localised tourism information (directions, maps, recommendations for accommodation, attractions, activities, food)  
• An new and emerging service provided by VICS is emergency information and communication provided during natural disasters (e.g. which roads are open, what to do)  
• Some VICS offer booking services and sell merchandise |
| **How have these key services evolved over time? How are they likely to change in the future?** | • Provide emergency services information  
• Information is now offered online and on smart phones. Consequently visitors now seek more localised |
<table>
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<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>information from VICs. Visitors are likely to have done research prior to travel and are increasingly coming to VICs with 3-4 options and will ask VIC which of these they recommend i.e. they get information qualified by the VIC. However, face to face contact and personal information provision is still important.</td>
<td></td>
</tr>
</tbody>
</table>
| How has the means for delivering these key services changed over time? e.g. phone, email, walk in enquiries. How are they likely to change in future? | • VTIC tracks phone, email and walk in enquiries, however haven’t yet started to track website hits or monitor the number of web enquiries (need to figure out exactly what to track but will do this in the future)  
• There is now a shorter lead time for enquiries (trend across the industry) including as a result of economic conditions (people are now more likely to wait until the last minute to book).                                                                                                                                                                                                 |
| What different types of VIC have emerged and what are the characteristics of these centres? | • Level 1 and level 2 accredited VICs (differ in staff and opening hours)  
• Some VICs are located in a key building e.g. an old post office in town  
• Some VICs are collocated e.g. with a community service  
• The characteristics of VICs are generally the same though  
• As most VICs are Council funded, VIC locations can be dependent on building availability and may not necessarily be the best location for a VIC.                                                                                                                                                                                                 |
| What are the key location characteristics of a VIC? E.g. town centre, on main road | • VICs in town centres are generally bigger  
• Smaller satellite VICs provide information to visitors before they get to a destination                                                                                                                                                                                                                                                                                                                                                                   |
| What are the key success factors for VIC effectiveness?                 | • Professional, knowledgeable, friendly staff. VIC staff differentiates as an information channel from the internet.  
• Support from local Council – understanding value of tourism in the local area, marketing and support role  
• There is an increasing importance for VICs to maintain not only a physical presence, but an online presence                                                                                                                                                                                                                                                                                      |
| How is VIC performance measured?                                        | • Varies between VICs however most would consider visitor numbers  
• A lot of the time the VIC is not doing the actual marketing (Council or tourism associations will) so visitor numbers etc are out of the control of the VIC  
• Yield generated  
• Customer satisfaction  
• Number of bookings and referrals                                                                                                                                                                                                                                                                                                                                                     |
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<th>Question</th>
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<tbody>
<tr>
<td>We are also hoping that you can recommend any additional national or</td>
<td>• Bendigo VIC</td>
</tr>
<tr>
<td>international VICs that would be appropriate for us to use as case</td>
<td>• New Zealand VIC network (franchised and therefore more consistent</td>
</tr>
<tr>
<td>studies. For example, VICs that are worlds best practice and are</td>
<td>across the network)</td>
</tr>
<tr>
<td>innovative in delivering visitor services (such as via electronic</td>
<td></td>
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<tr>
<td>media).</td>
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