# City of Mount Gambier

# Tourism and
# Visitor Information Services
# Review

RFQ AF16/516

March - June 2017

*Claire Ellis*
**Tourism analysis & solutions**

**KPPM STRATEGY**

## Executive Summary

The recommendations of the Visitor Information Servicing (VIS) review create a new approach for VIS in Mount Gambier that is visitor-oriented and adopts digital economy methods to deliver information when, where and how visitors need it. The proposed model re-focuses VIC resources into information provision including the visitor planning stages, based on a solid platform of digital information that also supports operator VIS activities. Tasks that detract from quality digital and face-to-face information servicing are reduced in favour of a 'hub-and-spoke' approach that takes information services to locations where visitors gather.

The core of the model is a comprehensive, motivational and accurate website that allows Mount Gambier's tourism industry and Council to better link to potential visitors as they plan their holiday - thus encouraging extended stays that are difficult to influence once visitors are in-region on tight schedules and better itineraries. The provision of information once visitors arrive in Mount Gambier will be improved by being available at multiple nodes, rather than focussed on one site only.

The recommendations of the Review strengthen the collaborative approach between industry, Council and other stakeholders and reinforce the concept that shared tourism responsibilities deliver better economic and social outcomes for Mount Gambier. The outcomes of the Review need to be communicated to the tourism industry and other stakeholders, so the collective impact is fully understood, and industry can implement their own decisions to best benefit from these changes.

There are significant re-purposing costs associated with these recommendations, particularly around changes in use and layout of the Lady Nelson Discovery Centre. The review has not focussed on creating cost savings but on better utilising existing resources to deliver improved results. The proposed model anticipates some loss of revenue for Council due to the removal of souvenir sales, although local retail operators are expected to benefit from reduced competition and increased VIS activity at The Main Corner and Umpherston Sinkhole. Income from third party leases at the Lady Nelson Centre may offset the loss of Council income.

Over time, the expected growth in Mount Gambier visitation and spend should contribute to a stronger visitor economy and new job creation.

These recommendations need to be understood in context. Firstly, while the bulk of the recommendations focus on improving the digital information available to visitors pre-visit, visitors will continue to source information from large online travel sites, directly from operators, from family and friends as well as from broader internet searches. It is not expected that a regional destination website will be able to compete and become the prime source or first point of call of potential visitors during their planning stages. However, the provision of a website with a strong motivational focus on activities and things to do in the area (stories and experiences) supported by accurate and comprehensive information, will be one of the useful tools visitors use in trip planning and will also better support consistent face-to-face VIS that engages visitors in memorable experiences during their stay.

Secondly, while this Review recommends the use of quality digital information as a core tool for the Visitor Centre staff and volunteers, it is still expected that most visitors to the VICs will prefer to speak with someone. Meeting a local who provides personalised recommendations

will continue to be an important aspect of Visitor Information Servicing. However, the quality and efficiency of information that provides the 'back of house' intelligence to support face-to-face enquiries has been improved through this Review. Resourcing of hard copy materials, which date quickly, is - except for tear-off maps - transferred to digital content that can be updated instantly. With digital technologies providing more accurate general information, face-to-face interactions will add value by sharing specific detail, local intelligence, authentic stories and enthusiasm.

Thirdly, this Review focuses Council staff time more clearly onto priority areas of VIS that will impact the Mount Gambier visitor economy. As such, the staff will work much more closely with other Council staff and parts of the tourism industry on collaborative approaches that will drive real change. The VIS work will be integrated with the broader economic development task and have strong connections to tourism operators to provide consistent and accurate VIS across a number of Council and industry sites to deliver an integrated destination marketing approach.

## Recommendations

### 1. *Visitor Information Servicing via multi-channel delivery*

1.1 Create content and distribute via multiple digital channels that appeal to existing and potential visitors enabling them to find the information they want, when and how they want it.

   a. Collaborate with Tourism Mount Gambier (TMG) in the development of core digital material that reinforces the appeal and brand of Mount Gambier; and make this available via online distribution channels used by current and potential visitors.

   b. Working with TMG, encourage the transition of print collateral (operator and association promotional material) to digital. Discontinue hard copy brochures and local and regional guides (in association with SATC).

   c. Work with TMG to encourage local operators to improve their overall digital skills and knowledge, their representation on the Discover Mount Gambier website and capacity to provide easy digital booking.

1.2 Review face-to-face visitor information needs and prioritise delivery improvements:

   a. Continue the provision of printed tear off maps while these are in demand by visitors.

   b. Monitor and adapt to shifting visitor information needs.

   c. Identify the face-to-face and digital information needs and interests of event and festival patrons (which can be quite varied) and target information services that better provide for these visitors.

1.3 Undertake a Workforce Development Plan for digital and mobile VIS delivery and support staff to transition to the new operating environment.

1.4 Be highly focussed on improving the effectiveness of Mount Gambier VIS operations. Cease activities that are resource-intensive but deliver minimal tourism benefit such as bus ticketing, souvenir sales. Do not introduce direct bookings currently but review needs with industry in a couple of years.

1.5 Establish and monitor clear and realistic digital KPIs (using digital analytics) to monitor results for content, uptake via digital channels and activity at physical sites.

### 2. *Multiple node face-to-face visitor information service*

2.1 Create a tiered approach to VIS provision.

   **TIER 1**: VIS directly managed and staffed by Council

   Paid and volunteer staff and located at:

   - Lady Nelson – remains the headquarters, but has a much smaller, more informal and contemporary information service, and provides 'back office' coordination of the other VIS outlets.

- The Main Corner - integrated visitor, gallery, cultural and event information in the foyer.

- In a mobile (kombi/caravan/popup/trailer) unit that can be used for festivals, events and busy sites.

Rotate VIS staff/volunteers through all Tier 1 VIS outlets (and provide a support role for Tiers 2 and 3) so that staff have a good appreciation of the nature of VIS at each site, and can contribute to continuous improvement in VIS.

**TIER 2**: VIS at key locations and attractions

Operators at key locations with suitable space should be encouraged to adopt high standards of concierge and customer service and provide simple 'self help' information via free wifi - sourcing up-to-date information from the Discover Mount Gambier website.

Council will provide regular VIS training to its own staff and volunteers and participating Tier 2 staff and maintain regular and collaborative communications to share insights on visitor information needs, ensure consistency and facilitate continuous improvement in response to emerging trends.

Re-charging facilities and attractive VIS information will encourage visitors to login and source information using their own devices. Depending on space at the attraction, the participating business may provide tablets or terminals locked onto Discover Mount Gambier.

Maintain regular and collaborative communications with Tier 2 VIS to share insights on visitor information needs, effective management and the ability to be nimble in response to emerging trends.

**TIER 3**: Partner with VIS in 'feeder' tourism regions

Work with other regional VIS to establish a regional touring route information network, utilising a hotline or dedicated touchscreen system, that provides potential visitors 'next stop' information by linking to reliable information portals such as Discover Mount Gambier. Sites may include Apollo Bay, Portland, Naracoorte and Robe which have high levels of potential pre-arrival visitors.

Similar arrangements should be explored with 'next stop' sites after Mount Gambier, such as Kangaroo Island, to minimise Mount Gambier Tier 1 VIS servicing time of 'outside Mount Gambier and surrounds' queries. By referring these directly to the appropriate local VIC or VIS better quality visitor servicing can also be delivered.

2.2 Use intelligence to monitor and adapt:

a. Monitor visitor numbers at key sites using a variety of tools such as improved visitor tracking, visitor data sourced from smart phone tracking, concessionaire reporting of visitation at key sites, event manager reporting and vehicle counts.

b. Use this information to determine the location, timing and level of VIS provision.

    c. Undertake regular evaluation of the transition process to ensure maximum cost-effectiveness, delivery standards, staff/volunteer/partner training needs and visitor satisfaction.

### 3. Create an effective, single, visitor-centric, multi-use website

3.1 Create a central portal that is visitor-centric, engaging, experiential and motivates people to visit and spend time in, and around, Mount Gambier.

    a. Review the functionality of the existing website under development (through TMG) and develop a detailed content and marketing strategy to ensure the final single website is fit-for-purpose (see Attachment E for some initial functionality considerations) and can deliver the goals of this Review.

    b. Clarify management of the single website and establish a set of clear, agreed principles and stakeholder responsibilities including resourcing.

3.2 Review the content already developed by TMG and prioritise the replacement of VIS printed collateral with digital bites of information.

3.3 Collaborate with industry to develop a phased transition:

    a. Digitise high volume Frequently Asked Question areas like local attraction opening hours, tour times etc.

    b. Provide a small grant program for industry and relevant community groups to identify priority areas to digitise. Identify print collateral that may still be needed in the short-medium term. A co-funding approach is recommended.

    c. Identify resource intensive areas that need co-resourcing, such as a 'one stop shop' for potential participants at festivals and events, and agree on a forward plan for resourcing and development.

### 4. Build a strong collaborative approach – internally and externally

4.1 Embed the operations and management of the VIC with the overall work of the Council to assist staff to create sustained change and connect the VIS work to wider Council goals.

4.2 Co-locate tourism, economic development, festivals and events, VIS and TMG support to foster innovation, collaboration and better allocation of team resources.

4.3 Develop a new volunteer program that delivers the VIS model as well as recognising and integrating with existing volunteer roles, particularly at the Riddoch Art Gallery and around festivals and events.

4.4 Review team goals and set KPIs for individuals, teams and projects to assist staff understand, transition and achieve the desired outcomes.

4.5 Provide regional leadership to build the festival and event markets, and maximise other opportunities including educational, business, and conference/convention and touring routes.

4.6 Review the provision and capacity of public wifi at key visitor locations.

4.7 Signs and interpretation at many Council sites, including wayfinding and information bays and associated images, need further improvement and should be strategically linked to the overall VIS approach.

## 5. Re-purpose the Lady Nelson Discovery Centre

5.1 Investigate complementary usage of the Lady Nelson building:

a. Investigate the potential for co-location by initiatives such as Gig-city and entrepreneurial start-ups that support tourism or economic development goals.

b. Test commercial interest in complementary commercial enterprises such as a café (potentially incorporating provision of the VIS service at the Lady Nelson).

c. Explore revenue and co-location benefits from leasing of office space for key tourism and economic development stakeholders (such as TMG, Chamber of Commerce, RDALC, LCLGA).

d. Based on the findings of these investigations, develop a masterplan for the site.

5.2 Repurpose the Lady Nelson building in its entirety:

a. Reduce and adapt the existing VIC space to a more open-plan public VIS function (similar to the VIS space at the Library). Ensure free wifi encourages use of visitor's own technology  and also add a touch sensitive computer console system to provide additional visitor access to the Discover Mount Gambier website and online tourism resources such as trip aggregators and allow volunteers to easily use these mechanisms to support VIS delivery.

b. Decommission the Lady Nelson Discovery Centre and repurpose the available space for office, meeting and training facilities.

c. Refit office, service and meeting spaces to accommodate the entire Economic Development Division.

d. Maintain the small function/ training room, but significantly increase its usage, particularly around the upskilling of the tourism industry in digital technologies, customer service and information servicing.

5.3 Reduce or eliminate non-core activities that draw resourcing away from VIS:

a. Maintain the regional bus stop but automate sale of bus tickets (using an online console if there is sufficient demand), with reduced person-to-person support and no cash handling (see Attachment A Bus Ticketing).

b. Remove counter sales cash transactions by eliminating gifts and souvenirs from Council VIS services (see Attachment C Souvenirs). Note this recommendation addresses Council cash transactions, and does not apply to a commercial cafe operator (or similar).

Review arrangements for management of cave diving keys, ideally based on an online application and payments managed by the relevant group/authority with VIS staff only required to check identification and hand over keys.

## 6. Formalise VIS at The Main Corner

6.1 Establish a Tier 1 VIS approach in the foyer at The Main Corner. Ensure early stage digital FAQ information includes retail, hospitality and attractions in the immediate vicinity of The Main Corner.

6.2 Capture visitor data (numbers, enquiries, visitor counter on the Volcano movie door) to assist refinement of VIS services from this location.

6.3 Use this data to establish the most effective time slots for Volcano movie shows based on proposed visitor itineraries in the area and advertise additional shows at peak visitor demand (this is currently done ad hoc rather than planned in advance).

## 7. Build tourism outcomes with the Riddoch Art Gallery

7.1 Integrate The Main Corner and Riddoch Art Gallery activity relating to arts, culture, heritage and development of new media. This should assist in the provision of updates and refreshing of interpretive tools and short stories on the environmental, cultural and social fabric of the Mount Gambier area.

7.2 Refresh and better utilise the Kings Floor space. Improved interpretation, particularly indigenous, would be appealing to visitors and the space could also be used more engagingly for creative community use.

7.3 Investigate the feasibility of running technology-oriented short courses for tourism operators and local photographers to create innovative video content. Also explore the capacity to improve live stream conventions and improve conference facilities.

## 8. Consider the value of the yellow 'i' status

8.1 Images on the highway entry point signage should be updated to promote the key visitor attractions of Mount Gambier (e.g. natural attractions and culture) to better motivate and attract potential visitors, encouraging them to stop rather than drive through.

8.2 The City of Mount Gambier should continue to be active in the State VIC Network and demonstrate the improved visitor servicing results of the multi-channel, multi-node approach.

## 9. Revitalise Mount Gambier attractions

9.1 Review how Council tourism assets are portrayed as experiences or products and increase their visibility on Australian Tourism Data Warehouse (ATDW), SATC/Tourism Australia searches and Touring Route sites.

9.2 Review opportunities for tourism experiences and create a long-term plan to help activate priorities that build on Mount Gambier's brand and destination appeal.

9.3 Develop an 'open for business' approach to new investment ideas, including procurement processes that allow for co-creation of ideas and co-investment in commercial initiatives, and case management of specific initiatives.

# Contents

## Glossary

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|---|---|
| ARTN | Australian Regional Tourism Network |
| ATDW | Australian Tourism Data Warehouse |
| DEWNR | Department of Environment, Water and Natural Resources |
| DPTI | Department of Planning, Transport and Infrastructure |
| FAQ | Frequently Asked Questions |
| IP | Intellectual property |
| LCLGA | Limestone Coast Local Government Area |
| LCLGATIDM | Limestone Coast Local Government Association Tourism Industry Development Manager |
| RDA | Regional Development Australia |
| RDALC | Regional Development Australia Limestone Coast |
| SATC | South Australian Tourism Commission |
| TMG | Tourism Mount Gambier |
| TXA | Tourism Exchange Australia |
| VIC | Visitor Information Centre |
| VIO | Visitor Information Outlet |
| VIS | Visitor Information Servicing |

## Introduction

The City of Mount Gambier lies at the heart of the vibrant Limestone Coast tourism region and is a key stop on the Melbourne-Adelaide touring route. However, Mount Gambier is yet to fully capitalise on its location and natural and cultural attractions.

In recent times, the City of Mount Gambier has supported the development of Tourism Mount Gambier (TMG) - an operator group auspiced by the Mount Gambier Chamber of Commerce. TMG has developed a strategic plan and will be supported by a new Council role, the Tourism and Economic Development Manager, who will work closely with other Council staff. Together with Council's City Growth staff and the Limestone Coast Local Government Association's Tourism Industry Development Manager (LCLGATIDM), there is now focused attention on the development of tourism product and experiences and collaborative marketing. With these processes under way, it is timely for Council to consider its role in Visitor Information Servicing.

In March 2017, the City of Mount Gambier commissioned Claire Ellis Consulting and KPPM Strategy to undertake a review of Tourism and Visitor Information Services (VIS), with the aim of identifying innovative strategies to ensure VIS services activate growth in the visitor economy and drive Mount Gambier as a tourism destination.

The four key areas of analysis within this review are:

- Develop an innovate visitor services delivery model
- Re-imagine and redevelop Visitor Centres as 'digital first' channels to market
- Report on the benefits of a 'service over centre' model, that includes investigation of alternate and satellite delivery sites, anticipated financial considerations, capital, operational, IR and Human Resourcing, and operating parameters
- Propose an implementation schedule, timeline and process

The Review Brief specifically notes recent and current projects that this Review should consider and align with:

- The City of Mount Gambier Community Plan
- City of Mount Gambier Digital Strategy
- Tourism Mount Gambier Strategic Plan: *Changing the Tourism Culture*
- City of Mount Gambier Signage Strategy and Actions.

The consultants' approach was collaborative and iterative, involving a series of meetings with key Council and Visitor Centre personnel, including Councillors; tourism groups; and an informal review of attractions and experiences. Specifically, this involved: a project initiation meeting on 17th March between the consultant team, Dr Claire Ellis (project lead) and Dr Kristine Peters, and City of Mount Gambier CEO Mark McShane, General Manager Community Wellbeing Barbara Cernovskis (Review project manager) and General Manger City Growth Judy Nagy. The consultants also undertook a tour of Mount Gambier on 17th March, discussing issues and opportunities. In addition, Dr Ellis reviewed the Mount Gambier and surrounds tourism offerings over the weekend of 18-19th March, conducted further interviews and meetings on 20-21st March (stakeholder meetings organised by Barbara Cernovskis) and presented initial findings to Judy Nagy and Barbara Cernovskis on 22nd March for further feedback.

The Draft Report was submitted on 13th April and reviewed in detail with Judy Nagy and Barbara Cernovskis on 1st May. The broad direction of the draft and associated issues and opportunities were also discussed in meetings with TMG President, Kent Comley, and a group of City of Mount Gambier Elected Members on 1st May. This Final Report provides the findings from the review process, addresses the specific questions set out in the Brief, and proposes a costed model with an implementation framework.

While the transition to the new model will incur one-off costs, the Review proposes a cost neutral approach to operational Visitor Information Servicing. It strongly recommends the ongoing development of a collaborative, co-contribution approach to VIS, destination marketing and related tourism approaches between the City of Mount Gambier and the tourism industry.

## Strategic approach

Together with the objectives outlined in the Brief, the consultants - in discussion with Council - focussed on the optimum allocation of Council budgets for Visitor Information Servicing, specifically looking at how growth in the Mount Gambier visitor economy can generate increased tourism revenue, deliver a more competitive and resilient local tourism industry and new regional jobs.

To achieve these outcomes, growth in one or more of the following is necessary:

- Increasing visitor numbers
- Increasing spend
- Increasing length of stay

This Review has focussed on realigning current Council spend to more effectively deliver growth outcomes. The aim of the Review was not to look for cost savings, but to repurpose existing resourcing to create significant and sustained improvements in tourism for Mount Gambier. Considerations included:

- The current scale and form of tourism management in Mount Gambier.
  Other locations have larger budgets (both industry and Council) and more a mature industry, so effective leveraging of resources across different roles and responsibilities, both within Council and with other tourism stakeholders, is critical. The capacity to consolidate, co-locate and share resources can significantly improve investment returns.

- The dynamic nature of the tourism sector.
  The industry is highly competitive and rapid changes in the broader system will affect Mount Gambier. There is rapid evolution in the way people access travel information, booking systems and visitor commentary on their experience, making the area of Visitor Information Servicing one of continual change.

- Collaboration within Council and across key stakeholders within the Mount Gambier tourism industry.
  Council is currently taking a lead role to strengthen the tourism sector in Mount

Gambier, by supporting the formation and initial operations of TMG as well as through Council's direct activities. Council's leadership role will continue to be important in some areas, such as VIS, and in the development of in-depth content about the stories of Mount Gambier. In other areas, such as prioritising and funding destination marketing, it is expected that industry will increasingly take the lead.

Internally, the VIS will be closely integrated with the broader remit of the Economic Development Division (including events and festivals) to better leverage internal resources and generate stronger outcomes. A collaborative approach, that recognises and values the work of each stakeholder and achieves mutual goals is recommended.

- Appropriate use of Council funds to sustainably grow Mount Gambier particularly:
  o Supporting community, increasing liveability
  o Supporting business growth and improving commercial opportunities
  o Breaking down barriers
  o Considering risk and
  o Effective budget and resourcing management.

- The need to take a visitor-centric approach.
  VIS should be centred on visitor needs and subsequent strategies to influence visitors to visit and spend more time in Mount Gambier. Visitor needs and preferences must therefore shape the model for visitor information servicing and tourism marketing. For example: many older travellers have smart phones/ tablets, but have limited data. Their priority in visiting a VIC is to access free wifi with face-to-face information a secondary concern. As wifi becomes more universally available, it is likely that the usefulness of VICs for this purpose will diminish.

Numerous complementary projects are already underway (e.g. City of Mount Gambier's *Digital Strategy* and *Signage Strategy*, and Tourism Mount Gambier's strategic plan *Changing the Tourism Culture*) and the outcomes of this Review will support and strengthen their outcomes.

This Review will have an immediate impact but also establishes a new way of working that will have benefits across the next 10 years.

## The Travel Cycle

Within tourism, the need for destinations to link with visitors across each stage of the travel cycle is widely recognised. *Diagram 1* (see following page) from the Alberta Visitor Centre Canada shows the points of intervention that influence visitors to travel to a location and how the roles of 'Visitor Services' providers and 'Marketing and Promotion' entities link to these influence points.

Increasingly, digital tools can deliver accurate, up-to-date and targeted information at each stage of the travel cycle. Digital platforms also make this information simultaneously available to large numbers of visitors and available before, during and after a trip.

Apart from some Grey Nomads and Backpackers, who are more likely to have flexible schedules, most travellers in Australia undertake a significant portion of their trip planning *before* arriving in a destination and have fixed holiday periods. Visitor information needs to be provided *prior* to arrival to influence longer stays.

In response to ubiquitous digital uptake, the South Australian Tourism Commission (SATC) has announced the phasing out of all printed Visitor Guides by 2020 in favour of digital formats. Mount Gambier's stories, messages and tourism product must therefore be ready to capitalise on this transition, or risk diminished relevance.

*Diagram 1*
*A New Visitor Services Model for Alberta: Engaging Visitors in an Era of Technology*, Jan 2017, p15.



THE ROLE OF VISITOR SERVICES IN THE TRAVEL LIFE CYCLE

Figure 2 shows the role of visitor services in relation to marketing organization in managing the visitor experience. Going forward visitor services will have an expanded role – assisting visitors throughout the travel life cycle. Visitor services should also include monitoring social media for negative comments and misinformation about the destination.

## Visitor Information Servicing

The traditional method of providing visitor information was via Visitor Information Centres with VIC staff providing 'content' (information) through a site-based channel (face to face within the VIC building) after arrival. The digital revolution has changed consumer access to information, with content now widely available at any time; increasing reliability as a result of high volume 'big data' consumer review sites (e.g. TripAdvisor) that target the specific interests of the user; simplified comparisons and booking by travel aggregators (e.g. Trivago and Booking.com); and share economy options (e.g. Uber and AirBnb) that may not be visible to VIC staff.

The capacity for a destination to effectively deliver relevant motivational material at different points around the travel cycle (see *Diagram 1*) has also altered. Travellers are increasingly using the internet and recommendations from social networks as their primary information source, and hence the relevance of VICs is undergoing rapid change.

Although face-to-face visitor servicing is still important, the investment in Visitor Information Servicing needs to shift from 'during the visit' to the potential visitor, providing appropriate information pre-arrival to increase the number of people who visit a destination, their opportunity to select the right visitor experiences for themselves and increase their length of stay. *Diagram 2* illustrates the respective roles of online information and services, and in-person roles.

*Diagram 2*
*A New Visitor Services Model for Alberta: Engaging Visitors in an Era of Technology, Jan 2017, p11.*

# VISITOR SERVICES
# MULTI-CHANNEL ECOSYSTEM
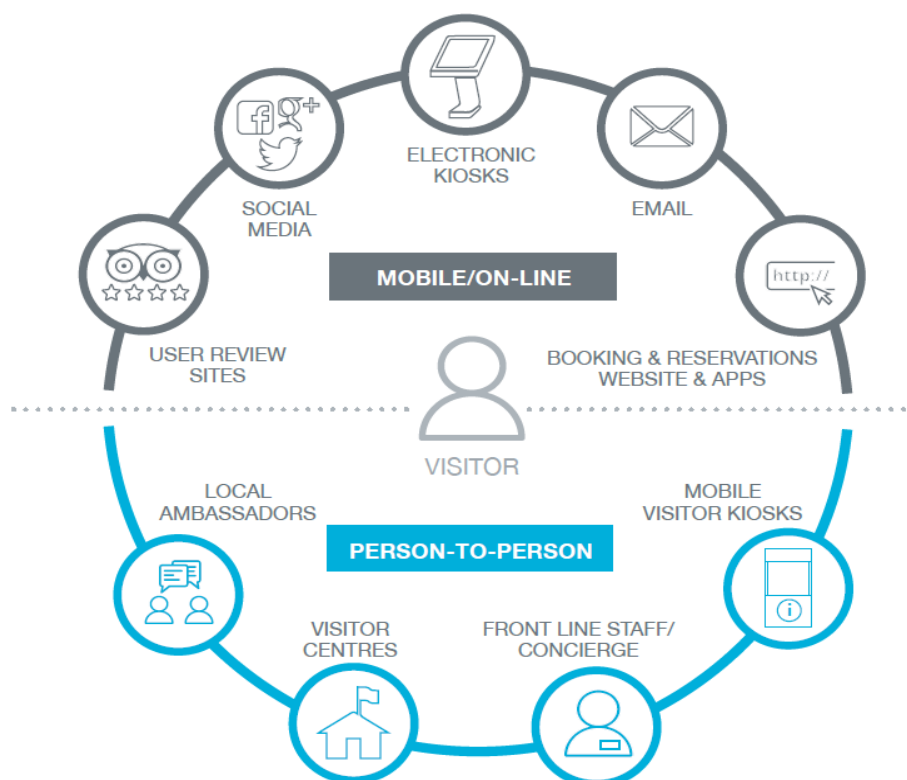
Research into the role and usage of VICs has recently been undertaken in several states and continues to show that at present, the VIC network plays a valuable role. A Western Australia study (Tourism Research Australia, *The Influence of Western Australia Visitor Centres on Tourist Behaviour*, *Summary,* Sept 2015) found that international visitors were major users and that tourists most often use a VIC if they:

- Are first time visitors
- Have insufficient access to information before they arrived
- Are staying more than one night.

The most common reasons to visit a VIC were to:

- Access information on attractions
- Obtain maps
- Get information on activities (including events).

A NSW study (Tourism Research Australia, *Visitor Information Servicing in New South Wales*, *Summary,* June 2016, p1) delivered similar findings but also noted

> 'While VICs continue to be the leading information source for visitors *during* their visit (42%)... **only 10% used the website of the destination VIC pre-visit**.'

Of concern in this study was that user satisfaction with VIC websites was only 62%.

Recently, online travel agency WebJet tested the influence of rich content on purchaser behaviour, by showing international shoppers additional rich content with the intention of measuring 'purchase funnel improvement' from the shopping cart to purchase. The research found a 26.3% conversion increase over those who did not interact with rich content.

https://www.tnooz.com/article/163886/

A 2016 analysis of Local Government spend on tourism showed that on average across Australia:

- 35% of Council tourism funding is spent on VICs
- 27% on destination marketing (printing maps, brochures, websites, signage etc.)
- 24% on events and festivals
- 7% on planning, research and product development
- 7% on other areas.

Of all states, South Australia spent the highest proportion of tourism funding on VICs at 55% (ARTN, *Local Government Spend on Tourism*, Jan 2017). The scale of investment shows VIC models need to be constantly refined to ensure the resourcing provides best value to the tourism industry.

# Background

## Mount Gambier's current tourism situation

Tourism in Mount Gambier requires significant development across most areas to achieve its potential. The greatest challenge is that visitors tend to see the city as a drive-through convenience, sometimes stopping to access retail and services, but do not consider that Mount Gambier has a range of interesting and contemporary activities and attractions that encourage destination status or longer stays.

Mount Gambier has the potential to appeal to a broad range of current and potential visitors, so VIS must consider different target markets and their specific information needs: for example, event attendees and repeat visitors may have very different interests and needs to first time international visitors.

Accurate data on Mount Gambier visitation is limited, with most tourism research at the regional level, and operator and industry data is generally not aggregated to allow specific insights (as is true in most towns and cities across Australia).

SATC regional data (see *Diagram 3*) shows visitation at 567,000 overnight visitors per year: dominated by intrastate visitors (54%), then interstate (37%) and international visitors (8%).

While international visitation is a small proportion of total visitation, Limestone Coast has the largest number of international visitors of any South Australian region outside of Adelaide. This is mainly due to self-drive and tour operations along the Melbourne-Adelaide touring route. Lady Nelson had 12,475 international visitors in 2015-16; the highest level of international visitor counter queries (July 2016 to April 2017) were from Germany (1,195) then UK (1,158) and US/Canada (564). Anecdotally, recent trends show a growth in the Adelaide-Melbourne touring route and also increases in the number of independent China travellers (LCLGATIDM pers. comm.).

*Diagram 3*
Limestone Coast Regional Profile, Dec 2016,
http://tourism.sa.gov.au/assets/documents/Limestone_Coast.pdf
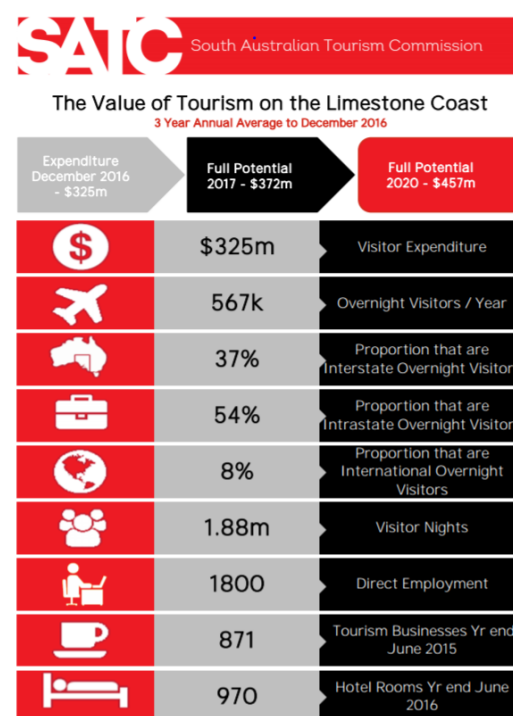
## Accommodation

Despite Mount Gambier's locational advantage, many visitors stay only one night. The average annual occupancy in the Limestone Coast is 45%, dropping to 38% in June (SATC, Regional Profile, Dec 2015) and the average RevPAR is $53 compared with South Australia's average of $93 for the same period[1].

Much of the accommodation in Mount Gambier is tired and in serious need of re-investment.

Across the region, 304 businesses have an ATDW listing (Australia's national database and distribution platform), while only 23 are TXA enabled (Australia's online bookable product distribution platform). About 40 operators provide 'internationally ready product' and are active in the distribution system (LCLGATIDO pers. comm.).

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**Limestone Coast Accommodation summary**

There are 459 tourism businesses listed in the Limestone Coast tourism region, of which 229 are accommodation listings (SATC, *Regional Profile* Dec 2015). In comparison, the VIC listed 62 accommodation properties in Mount Gambier city and surrounds (Mount Gambier VIC, *Accommodation city and surrounds* brochure, 2015).

- 21 listed motels with 590 rooms
- 8 listed Hotels with 78 rooms
- 2 listed backpackers with 23 rooms
- 7 camping caravan and holiday parks, with 144 unpowered sites, 299 powered sites, 74 cabins, 98 units
- 24 listed B&B, traditional or self-contained houses and cottages

These numbers had dropped a little in the most recent major update undertaken in 2016 (7 hotels and 20 B&Bs: traditional or self-contained but no room update included). In summary, there are considered to be around 1500 beds in the Mount Gambier area (TMG pers. comm.).
In addition, around 230 properties are listed with AirBnB (LCLGATIDO, pers. comm.).

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## Activities and attractions

At present, there is insufficient product available, or perceived to be available, to provide a strong drawcard for visitors. The total sum of all attractions and activities is also insufficient. For instance, retail slows down on Saturday afternoon and Sunday which reduces the appeal of weekend stays. Contemporary food and beverage options for visitors are limited, creating a major gap around current visitor motivation. Art, culture, heritage (including indigenous) and activities such as walking and biking have not been well activated in the visitor economy.

There are a number of reasons the city has not yet gone through a tourism revitalisation process, but a key reason is that it has had relatively consistent tourism:

- Due to its fortuitous position on a major touring route, and

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[1] Revenue per available room, RevPAR, is a performance metric used in the hotel industry and is calculated by multiplying a hotel's average daily room rate (ADR) by its occupancy rate. Data provided by SATC, *Survey of Tourism Accommodation*, 12 months ending June 2016 – note figures relate to hotels, motels and serviced apartments with 15+ rooms.

- The number of distinctive and appealing free experiences in and around the city.

However, experiences have not been kept up to date in terms of visitor appeal. Many are managed by Council, or in Mount Gambier's surrounds by DEWNR, and hence have not been run as commercial operations.

The Review recognises that the new Tourism Mount Gambier strategy aims to drive change within the sector. This Review has identified a number of strategies to address tourism growth barriers that are within Council's scope to lead. These are set out in *Recommendations*.

## *Destination marketing*

Marketing of Mount Gambier tends to be accommodation-driven with few activities and attractions featured (yet these are the main motivators for visitation). Destination marketing has not been well developed and there are few packages to assist visitors to imagine or book multi-day itineraries.

## Council capacity to support tourism growth

The City of Mount Gambier is undergoing an organisational restructure and expansion including recently taking on the Riddoch Art Gallery. As part of the restructure, tourism has been recognised as an economic driver for the City and tourism has been incorporated in City Growth, joining events and festivals with VIC etc.

The formation of Tourism Mount Gambier, auspiced by the Mount Gambier Chamber of Commerce, has been a very positive strategy and the newly formed group (the inaugural meeting and AGM was held just prior to this Review) has rapidly actioned tasks in line with the TMG *Strategic Plan*. A new Tourism and Economic Development Manager, funded by Council and supporting the work of TMG, has been recently appointed.

During Review discussions, it was clear that there is potential to better leverage and coordinate different elements of Council work (internally and with external stakeholders such as LCLGATIDO and Tourism Mount Gambier) to create more effective tourism outcomes.

Improvements in tourism outcomes can also be achieved by leveraging 'non-tourism' initiatives to provide a key competitive advantage for Mount Gambier. These include:

- The opportunities provided around the Gig-city concept.
- Working with educational institutions to increase in-bound student enrolments and visits by Adelaide and Melbourne-based international students (students are an important component of the visitor economy, educational 'visiting friends and relatives' (VFR) is noted for its role in boosting return visitation in the long term).
- Investigation of a business start-up concept to grow new tourism businesses.

> Public Library Services is investigating adoption of iBeacon technology for the SA library network. These technologies interact between personal devices and location, allowing 'push' notifications (such as stories about local features) as people walk past.

- Recognising the broader components of the Visitor Economy and improving links with corporate and business opportunities.
- Community projects, particularly around community creative space that provide engaging and authentic visitor experiences.

## Lady Nelson Discovery Centre and Visitor Information Centre

The Visitor Information Centre (VIC) at the Lady Nelson Discovery Centre is fully funded by Council. It is accredited (national yellow *i*) and is part of the South Australian VIC network. The Visitor Centre has a primary focus on supporting visitors who have already arrived in Mount Gambier, by mainly assisting visitors who walk into the Centre. It also responds to telephone and email queries, supports festivals and other large events by providing information prior to arrival and undertakes some marketing and social media to alert potential VIC visitors to VIC offerings and location.

### *The service*

City of Mount Gambier data shows that in 2015/16, the Lady Nelson Discovery Centre and Mount Gambier Visitor Centre cost $595,404 with revenues of $75,042 (net annual cost $520,362). In addition, Council undertakes many tasks that contribute to the visitor economy of Mount Gambier.

Of the 75,000 current visitors to the Lady Nelson, around 65,000 are estimated to be face-to-face walk-in visitors (see *Visitor Statistics* text box):

- Visitation to Mount Gambier VIC is the fourth highest in South Australia (2015/16).

- Total visitation over the last five years has dropped by 11% from 94,277 (2011/12) to 74,990 (2015/16).

- Anecdotally, 30-40% of Lady Nelson enquiries are not about Mount Gambier but about further stops along travel routes. This is common across the Australian VIC network.

Currently, approximately half of the visitors to the Discovery Centre are tourists/visitors, the rest are educational school groups or bus tours of older visitors - mostly from Victoria (Team leader, VIC, pers. comm.).

| 2015/16 Lady Nelson Visitor Statistics | |
|---|---|
| (City of Mount Gambier Annual Report 2015/16) | |
| Total visitors | 75,325 |
| Total counter enquires | 53,310 |
| Counter enquiries (non-Mt Gambier residents) | 46,176 |
| Bus enquiries | 10,867 |
| Bus ticket sales | 5,327 |
| Entries to Discovery Centre | 6,506 |
| Email and Phone enquiries | 2,419 |
| Info pack mail-outs | 1,761 |
| Cave Diver keys | 285 |
| Bike Hire | 68 |

South Australian Accredited Visitor Information Centre Network, *Visitation and Economic Benefits 2011/12-2015/16,* Aug 2016:

Anecdotally the main international tourism markets for this region are people from Europe (German, Italian) but increasingly the Indian (VIC Team Leader, pers. comm.) and China markets (LCLGATID, pers. comm.) are growing and each have their own needs.

The VIC undertakes a limited range of other tasks including bike hire, cave diving key management and providing pre-visit information for festival patrons.

Some marketing is undertaken. Much of this promotes the existence and services of the Lady Nelson Discovery Centre, with the aim of driving visitation to the Centre - rather than highlighting the destination attributes of Mount Gambier. The VIC also produces a wide suite of guides and brochures, largely used to assist visitors on arrival as well as for potential festival/ event attendees. It is active in some social media and operates the Lady Nelson Facebook site.  The VIC website is a subset of the City of Mount Gambier website, and mainly provides information about VIC services.

*The VIC does not take bookings, plays a minor role in generating tourism sales and is not seen by the local tourism industry as a driver of growth.*

## The space

The physical location is well positioned for travellers driving between Melbourne and Adelaide, and has good car, motorhome and bus parking facilities as well as public toilets. However, it is distant from the city centre and does not create an immediate link to local shops to grow visitor spend.

The Lady Nelson Centre itself is over 30 years old. Approximately half of the 800m$^2$ plus space houses the Discovery Centre, which interprets the Mount Gambier area and its peoples from geological times to the present. The other half of the building contains the Visitor Information Centre service area, staff offices, storage, kitchen and meeting/function space. While the design was suitable for its time, the layout does not support contemporary visitor information needs, nor does it allow for flexible approaches to visitor servicing.

The Discovery Centre mostly consists of static old-style displays and a more modern hologram interpreting the Christina Smith story. Until recently a small entry fee was charged, but this was decreased and finally removed as of 1 July 2016 as the displays were no longer contemporary and free entry was expected to deliver greater visitation.

In addition, the Lady Nelson Centre serves as a bus depot for V-Line and Premier Stateliner. The location is ideally situated, with significant car parking. The bus depot is largely a service to the community and is not used extensively by tourists. The system of selling tickets over the counter was identified as very inefficient and costly of staff time. It was reviewed by staff in November 2016 and process adjustments made. An additional review of tickets sold and associated service time was conducted in late March as part of this Review. Attachment A shows the cost savings made by this process adjustment.

## The Main Corner and Riddoch Art Gallery

The Main Corner complex, incorporating Riddoch Art Gallery and Cave Gardens, is a major community and civic hub, close to eateries and retail as well as a range of visitor attractions and community services such as Council Chambers and the Library.

The Main Corner is a significant attraction in its own right, housing both the Riddoch Art Gallery and Volcano movie as well as display space on the Kings Floor which currently

provides older style interpretation. The James Morrison Jazz Academy is immediately adjacent.

The Main Corner is a natural point for visitors to seek information about Mount Gambier, and currently many visitors request tourism information from The Main Corner front desk staff. The VIC Team Leader noted that Council Visitor Information staff have previously trialled information service delivery at both The Main Corner and Lady Nelson sites, recognising the logic in providing information services where significant visitor numbers already exist.

The Main Corner has sufficient space in the foyer to provide contemporary visitor information servicing. Increasing the visitor information capacity will assist the newly-acquired art gallery to achieve its financial sustainability goals, help deliver mutually desirable goals for visitation and greater links with the art, culture and heritage attractions in Mount Gambier.

## Findings

This section of the report addresses the areas of analysis set out in the Review Brief, providing context for the *Recommendations* to follow.

### What I want, when I want it

The current approach to visitor information servicing reflects its traditional static roots. Prior to the widespread adoption of digital technologies, visitors relied on face-to-face interaction at a destination to find out about local activities and services and gather objective advice. The digital revolution has meant that this information is available during the trip dreaming and planning stages, and that many decisions (and bookings) are made prior to visitors entering the region: perceptions have been created, schedules have been set, and activities decided before the visit commences. Advice from previous travellers is now readily available and regarded very highly as a source of information.

*In the digital environment, the traditional 'arrive and decide' model of visitor information servicing is losing relevance.*

In order to increase visitation and the length of stay in Mount Gambier, VIS needs to have a significantly stronger presence at the dreaming/planning/booking stages, and must be active in the digital environment to achieve this. It will be essential that digital VIS strategies complement, rather than compete with, large scale online travel sites that will continue to dominate visitor pre-trip travel planning.

The model recommended in this Review anticipates further uptake and reliance on digital information and commerce, and proposes a model that delivers visitor information that is 'what I want, when I want it'.

A key feature of this approach will be an information 'shopping basket' enabling visitors or VIS staff to search for and select specific information, save it into a 'shopping basket' that can be sent electronically. This saves the cost of Visitor Guide production, storage and distribution and removes the focus on brochure racks. Importantly for visitors who do prefer hard copy, digitised information (the selected information in a visitor's shopping basket) can be easily printed prior to arrival or at a VIS location in Mount Gambier.

### VIS leads the delivery of 'digital first' channels to market

Visitor Centres (and their variations: VIOs, roving ambassadors, and tourism operator staff trained to provide information about regional offerings) must play a stronger and more integrated role in positioning the region as a cohesive destination, attracting visitors during the dreaming/planning stages, and channelling visitors to the experiences that will make the strongest positive impact.

Information portals should be coordinated, cohesive and stand out among the many thousands of similar and competing offers.

*The role of VIS is to provide the information 'oil' that connects the individual 'cogs' in the visitor economy.*

Mount Gambier has unique, world class, natural and cultural attractions that should be central to its digital marketing and storytelling.

## Service over Centre model

For visitors on fixed-length trips, time is critical. Location-driven tourism information on hand-held devices is becoming the dominant in-region information channel, providing visitors with real time, trusted, socially-mediated feedback.

The contemporary visitor is more likely to seek face-to-face information during stops for fuel, food and attractions than to go out of their way to visit a Visitor Information Centre with static displays and rapidly dating hard copy materials.

The shared aim of tourism providers (accommodation, food/beverage, activities and entertainment, supporting goods and services) should be to give visitors a memorable 'wow' experience on their first in-region contact. A coordinated and collaborative tourism sector that monitors and values overall visitation, rather than 'numbers through the visitor centre' will be more successful in supporting visitor economy growth.

The model recommended by this Review places skilled VIS staff and volunteers at places where visitors go, aiming to capture interest and provide timely information at first in-region contact, with the intent of retaining visitors longer, increasing spend, and gathering intelligence that will inform both digital and physical visitor information services.

## Collaboration and cohesion

Council's support of, and current investment in, Tourism Mount Gambier is a key step in creating significant improvement in Mount Gambier's visitor economy. As the working relationship develops, and tourism growth occurs, many new collaborative opportunities will appear. A strong working relationship will be needed to support discussions and decisions regarding priorities, responsibilities and co-funding.

Potential joint project examples include:

- Concessionaire contracts at key visitor locations could require annual reporting of visitor statistics: Capitalise on the rapid changes in visitor tracking technology and visitor data capture to produce quality visitor data over time.

- A visitor database can be compiled from free wifi login and used to send e-newsletters and updates – targeting repeat visitation, events and visitor interests (see Eurobodalla's approach as an example).

- Approaches around how to manage AirBnb and other share economy initiatives could be considered jointly to allow stakeholders to understand each other's perspectives and approaches.

- Collaborative funding opportunities (such as Sports Marketing Australia or festival and event options) could be reviewed to determine the likely outcomes and value to the local economy and to participating businesses.


A growing, competitive and active tourism industry in Mount Gambier will support wider regional growth. This Review has focussed on strengthening Mount Gambier's tourism industry, but also recognises the wider role Mount Gambier plays within its region and the importance of the region, including the Melbourne-Adelaide touring route, in driving visitation to Mount Gambier. The new Limestone Coast tourism strategy and implementation plan have been approved. Discussions with the LCLGATIDM indicate that the recommendations of this Review will complement regional tourism development work.

## Recommendations

### 1. Visitor Information Servicing via multi-channel delivery

#### Rationale

The development of a core of accurate, motivational, comprehensive online information that can be easily maintained and updated will allow Mount Gambier to shift from a Visitor Information Centre focus, largely delivering on the face-to-face needs of visitors once they have arrived, to a more contemporary multiple channel digital VIS approach.

*Diagram 2*, adapted from an Alberta Canada example, illustrates the range of mechanisms the Mount Gambier VIS should be utilising to better connect with visitors. Attachment B, *Two Years' Time, Our Mount Gambier*, provides a futuristic description of what this may look like.

*The multi-channel approach will enable VIS staff, and people in customer service roles across the regional visitor economy to assist visitors find the information they need through local knowledge and authentic engagement, supported by an up-to-date online resource.*

Putting visitor information needs at the core of the model will release staff from static 'behind the desk' tasks and deploy them to critical visitor information points (both digital and physical). This will create process efficiencies and enable Council VIS resources to reach potential visitors at key decision-making stages, particularly the planning and in-region 'explore' stages.

Because this Review recommends a very different way of working, monitoring will be important, and measures should reflect the new model, rather than being based on traditional delivery standards (for instance, face-to-face VIS numbers may drop because online servicing is working more effectively).

#### Strategies

1.1.    Create content and distribute via multiple digital channels that appeal to existing and potential visitors enabling them to find the information they want, when and how they want it.

    a.    Use *Diagram 2* as a guide, collaborate with TMG in the development of core digital material (information and stories) that reinforces the appeal and brand of Mount Gambier; and make this available via online distribution channels used by current and potential visitors (a single shared website/portal, social media, collaborative marketing promotions).

    b.    Working with TMG, encourage the transition of print collateral (operator and association promotional material) to digital. Discontinue hard copy brochures and local and regional guides (in association with SATC).

    c.    Work with TMG to encourage local operators to improve their overall digital skills and knowledge, their representation on the Discover Mount Gambier website and capacity to provide easy digital booking.

1.2. Review face-to-face visitor information needs and prioritise delivery improvements accordingly:

    a. Continue the provision of printed tear off maps while these are in demand by visitors.

    b. Monitor and adapt to shifting visitor information needs:

        i. Ask visitors to VIS sites how information could be provided in a way that's more convenient. Record, analyse and adjust.

        ii. Identify and address the specific information needs of international travellers.

    c. Identify the face-to-face and digital information needs and interests of event and festival patrons (which can be quite varied) and target information services that better provide for these visitors.

1.3. Undertake a Workforce Development Plan for digital and mobile VIS delivery and support staff to transition to the new operating environment.

1.4. Be highly focussed on improving the effectiveness of Mount Gambier VIS operations. Cease activities that are resource-intensive but deliver minimal tourism benefit such as bus ticketing (see Recommendation 5.3) and souvenir sales. Do not introduce direct bookings currently but review needs with industry in a few years.

1.5. Establish and monitor clear and realistic digital KPIs (using digital analytics) to monitor results for content, uptake via digital channels and activity at physical sites.

## 2. Multiple node face-to-face visitor information service

### Rationale

The current VIC is not ideally located to capture visitors entering Mount Gambier from all of the key South Australian routes, nor to engage with visitors in the Mount Gambier CBD or at key attractions.

Digital technology allows VIS staff/volunteers to have information at their fingertips and 'be where the visitors are', which may change according to the day, season, holiday pattern or event.

As face to face visitor information servicing remains a preferred option for around 53,000 visitors annually (Lady Nelson counter enquiries 2015/16), a fit-for-purpose approach should be developed.

The recommended model for Mount Gambier VIS is to 'go where the visitor is': create multiple, smaller information-servicing locations at various sites around Mount Gambier (and further afield) where visitors already cluster or seek information, rather than having one major Visitor Centre. These should have free wifi, recharging facilities, and comfortable surrounds so that visitors can easily and rapidly access information about the local area.

Production of content displayed on flat screens at the Visitor Information Servicing area of Lady Nelson, at The Main Corner and the provision of quality content for Tier 2 VIS, will provide visitors with more engaging and better access to the stories of Mount Gambier.

### Strategies

2.1.   Create a tiered approach to VIS provision.

   *TIER 1: VIS directly managed and staffed by Council*

   Using paid and volunteer staff and located at:

- Lady Nelson – remains the headquarters, but has a much smaller, more informal and contemporary information service, and provides 'back office' coordination of the other VIS outlets.

- The Main Corner - integrated visitor, gallery, cultural and event information in the foyer.

- In a mobile (kombi/caravan/popup/trailer) unit that can be used for festivals, events and busy sites:

o   The mobile unit should be attractively painted to create high visibility and recognition, and travel as required for events and busy periods/locations (for instance, it could also be used at key feeder locations or events in South Australia and Victoria to capture people planning to travel towards Mount Gambier).

o   The mobile facility should provide staff/volunteers and visitors with some shelter, so this needs to be factored into the design.

o   The mobile concept is scaleable, rented mobile units (e.g. vans with Mount Gambier 'skins') could be used for events and consumer shows, which would provide a more flexible approach to piloting this delivery method.

Rotate VIS staff/volunteers through all Tier 1 VIS outlets (and provide a support role for Tiers 2 and 3) so that staff have a good appreciation of the nature of VIS at each site, and can contribute to continuous improvement in all aspects of VIS.

### TIER 2: VIS at key locations and attractions

Operators at key locations with suitable space should be encouraged to adopt high standards of concierge and customer service and provide simple 'self help' information via free wifi - sourcing up-to-date information from the Discover Mount Gambier website.

Council will provide regular VIS training to its own staff and volunteers and participating Tier 2 staff and maintain regular and collaborative communications to share insights on visitor information needs, ensure consistency and facilitate continuous improvement in response to emerging trends.

Re-charging facilities and attractive VIS information will encourage visitors to login and source information using their own devices. Depending on space at the attraction, the participating business may provide tablets or terminals locked onto Discover Mount Gambier.

Potential Tier 2 VIS locations include:

- The Old Gaol (taps into a different demographic).
- Motel Mount Gambier (already highly connected).
- The Blue Lake (public space, holiday park and concessions).
- Prime highway visitor sites with free wifi (such as MacDonalds).
- Mount Gambier Airport.

### TIER 3: Partner with VIS in 'feeder' tourism regions

Work with other regional VIS to establish a regional touring route information network, utilising a hotline or dedicated touchscreen system, that provides potential visitors 'next stop' information by linking to reliable information portals

such as Discover Mount Gambier. Sites may include Apollo Bay, Portland, Naracoorte and Robe which have high levels of potential pre-arrival visitors.

Similar arrangements should be explored with 'next stop' sites after Mount Gambier, such as Kangaroo Island, to minimise Mount Gambier Tier 1 VIS servicing time of 'outside Mount Gambier and surrounds' queries. By referring these directly to the appropriate local VIC or VIS better quality visitor servicing can also be delivered.

2.2. Use intelligence to monitor and adapt:

a. Monitor visitor numbers at key sites using a variety of tools such as improved visitor tracking, visitor data sourced from smart phone tracking, concessionaire reporting of visitation at key sites, event manager reporting and vehicle counts.

b. Use this information to determine the location, timing and level of VIS provision.

c. Undertake regular evaluation of the transition process to ensure maximum cost-effectiveness, delivery standards, staff/volunteer/partner training needs and visitor satisfaction.

## 3. *Create an effective, single, visitor-centric, multi-use website*

### Rationale

The City of Mount Gambier is currently funding the creation of a website through TMG.

Multiple websites create greater complexity for the visitor which undermines sales as it makes travel planning more confused; increases operator inefficiencies, increases costs and leads to fragmentation, stakeholder factionalisation, and cannibalisation of search engine position - with the result that no-one benefits.

A single cohesive 'go-to' website will provide a trusted landing site that captures visitor interest. Importantly, Search Engine Optimisation can be maximised, enabling Mount Gambier to appear at the top of web searches, thus increasing its prominence for potential visitors.

Recognising the benefits of digital VIS, a number of locations around Australia have supported a single cohesive website as part of a strategy of shifting reliance from Visitor Information Centres to engaging online content:

- Yarra Valley is phasing out their VICs, and have built a strong website https://visityarravalley.com.au/ that allows a visitor to add experiences, products, towns etc. to their 'information shopping basket' and then uses Google Maps to help the visitor plan how to do these activities. The information is emailed to the visitor.

- At a state level, Tourism Tasmania has similar functionality for the website. https://gobehindthescenery.com.au/map/

- On a smaller scale, Coffs Coast has a visitor-centric and experience-focussed website, but without the depth and itinerary building functionality. Coffs website is Council owned and all eligible businesses can ask to have their product included. http://www.coffscoast.com.au/

- In contrast, Tourism Kangaroo Island website is owned by the Regional Tourism Organisation which also operates the VIC. It uses a membership approach and only member product is displayed. Despite this, it has become quite effective with a high level of membership by core tourism product (such as accommodation and tours) but very limited engagement of other services visitors seek such as food and wine. http://www.tourkangarooisland.com.au/

- Tourism Central Australia recently won the gold award for VICs at the Australian Tourism Awards. Owned by the Regional Tourism Organisation and membership based, it is continuing to focus on growing its digital connections with visitor's pre-arrival including live chat on the website (Talk to an Expert). http://www.discovercentralaustralia.com/

The final website should not be part of the wider Council website but be visitor-centric. It must be mobile friendly and operate well on dedicated terminals.

The website will be used by:

- Visitors, both in the dreaming/planning stage, and during and after a visit.

- VIS staff/volunteers who can quickly navigate comprehensive, factual information to provide information requested by visitors.

- VIS and Council's event team to shift from sending bags with collateral to sending motivational content through digital linkages.

- TMG, to support social media and as a key marketing tool.

- Locals, to make recommendations to visiting friends and keep informed about activities and events.

Council is currently funding the initial development of the website (via TMG) and should expand its involvement in website development to deliver the online needs of this Review. Industry should continue as key collaborators and increasingly take over the role of site manager and driver of industry involvement - including resourcing of regular updates. This shared responsibility model may involve:

- Council supporting the collation of rich motivational content and stories (heritage, food and wine, people/ place etc.).

- Industry using allocated sections for advertising (such as 'stay and play packages' and 'hot deals' tabs) to source revenue to help create a financially sustaining model.

- All operators maintaining their own accurate information digitally with periodic update / confirmation requirements to fulfil the needs of VIS.

- Events and festivals information and packages being included through community, Council and industry collaborations.

- VIS providing data analysis, updates and insights around digital use and potential and actual visitor needs to improve evidence-based decision making.

- Agreement on geographical and product breadth (e.g. all core tourism operators must be included not just members and grey areas often include eateries, retail, AirBnb, vehicle service shops, pharmacies, newsagents etc. that a visitor may wish to find).

### Strategies

3.1.    Create a central portal that is visitor-centric, engaging, experiential and motivates people to visit and spend time in, and around, Mount Gambier.

    a.    Review the functionality of the existing website under development (through TMG) and develop a detailed content and marketing strategy to ensure the final single website is fit-for-purpose (see Attachment E for some initial functionality considerations) and can deliver the goals of this Review.

    b.    Clarify management of the single website and establish a set of clear, agreed principles and stakeholder responsibilities including resourcing.

3.2.    Review the content already developed by TMG and prioritise the replacement of VIS printed collateral with digital bites of information.

3.3.    Collaborate with industry to develop a phased transition:

    a.    Digitise high volume Frequently Asked Question areas like local attraction opening hours, tour times etc.

    b.    Provide a small grant program for industry and relevant community groups to identify priority areas to digitise. Identify print collateral that may still be needed in the short-medium term. A co-funding approach is recommended.

    c.    Identify resource intensive areas that need co-resourcing, such as a 'one stop shop' for potential participants at festivals and events, and agree on a forward plan for resourcing and development.

## 4.    *Build a strong collaborative approach – internally and externally*

### Rationale

The current VIC operations do not support other areas of Council work or the newly developed Tourism Mount Gambier as effectively as needed. Past reviews have

recommended changes including better use of volunteers and providing visitor servicing at multiple points in Mount Gambier (VIC Team Leader, pers. comm.). While these changes have not been sustained long enough to allow continual improvement, they are still very valid, and so are recommended again in this Review.

Integrating the VIS staff much more closely into the Economic Development team will enable better support and leveraging of resources, as well as improved knowledge and workload management.

The recommendations of this Review require a pool of trained volunteers to undertake face to face servicing of visitors across multiple sites.

*Council staff will be primarily responsible for developing and maintaining the volunteer visitor information program, managing digital content and placement, and supporting integrated Tier 1, 2 and 3 services.*

The Review identified support for a collaborative Council-industry approach, recognising the strengths of each party to contribute to VIS that create a more visible and attractive proposition for Mount Gambier as a destination, and support better in-region visitor engagement and experiences.

### Strategies - internal

4.1. Embed the operations and management of the VIC with the overall work of the Council to assist staff to create sustained change and connect the VIS work to wider Council goals.

4.2. Co-locate the entire Economic Development Division (economic development, festivals and events, VIS, TMG support) to support innovation and collaboration and better allocation of team resources.

4.3. Develop a new volunteer program that delivers the VIS model as well as recognising and integrating with existing volunteer roles, particularly at the Riddoch Art Gallery and around festivals and events.

4.4. Review team goals and set KPIs for individuals, teams and projects to assist staff understand, transition and achieve the desired outcomes.

### Strategies - external

4.5. Provide regional leadership to build the festival and event markets, and maximise other opportunities including educational, business, and conference/convention and touring routes.

4.6. Review the provision and capacity of public wifi at key visitor locations.

4.7. Signs and interpretation at many Council sites, including wayfinding and information bays and associated images, need further improvement and should be strategically linked to the overall VIS approach.

## 5. *Re-purpose the Lady Nelson Discovery Centre*

### Rationale

The Lady Nelson Discovery Centre displays are static and old, and not attracting significant visitor interest (6,506 visitors in 2015/16 from a potential audience of 75,000 annual visitors to the VIC). There is no budget for a major overhaul and greater benefit to the tourism sector would be achieved by resourcing the recommendations for improved content, website and signage.

The alteration from a Visitor Information Centre to multi-node, multi-channel Visitor Information Servicing will require a re-fit of the reception area at the Lady Nelson Discovery Centre/VIC and a review of the spatial needs for staff offices, potential partner co-location (e.g. TMG, LCLGATIDM), service areas and training/ function space. The space created by the decommissioning of the Lady Nelson Discovery Centre presents options for better use, including the potential for leasing space to third parties.

### Strategies

5.1.   Investigate complementary usage of the Lady Nelson building:

   a.   Investigate the potential for co-location by initiatives such as Gig-city and entrepreneurial start-ups that support tourism or economic development goals.

   b.   Test commercial interest in complementary commercial enterprises such as a café (potentially incorporating provision of the VIS service at the Lady Nelson).

   c.   Explore revenue and co-location benefits from leasing of office space for key tourism and economic development stakeholders (such as TMG, Chamber of Commerce, RDALC, LCLGA).

   d.   Based on the findings of these investigations, develop a masterplan for the site.

5.2.   Repurpose the Lady Nelson building in its entirety:

   a.   Reduce and adapt the existing VIC space to a more open-plan public VIS function (similar to the VIS space at the Library). Ensure free wifi encourages the use of visitor's own technology and also add a touch sensitive computer console system to provide additional visitor access to the Discover Mount Gambier website and online tourism resources such as trip aggregators and allow volunteers to easily use these mechanisms to support VIS delivery.

   b.   Decommission the Lady Nelson Discovery Centre and repurpose the available space for office, meeting and training facilities.

   c.   Refit office, service and meeting spaces to accommodate the entire Economic Development Division.

   d.   Maintain the small function/ training room, but significantly increase its usage, particularly around the upskilling of the tourism industry in digital technologies, customer service and information servicing.

5.3.    Reduce or eliminate non-core activities that draw resourcing away from VIS:

a.  Maintain the regional bus stop but automate sale of bus tickets (using an online console if there is sufficient demand), with reduced person-to-person support and no cash handling (see Attachment A Bus Ticketing).

b.  Remove counter sales cash transactions by eliminating gifts and souvenirs from Council VIS services (see Attachment C Souvenirs). Note this recommendation addresses Council cash transactions, and does not apply to a commercial cafe operator (or similar).

c.  Review arrangements for management of cave diving keys, ideally based on an online application and payments managed by the relevant group/authority with VIS staff only required to check identification and hand over keys.

## 6. Formalise VIS at The Main Corner

### Rationale

The Main Corner is the geographic, retail and cultural heart of Mount Gambier. Visitors naturally gravitate to the location to seek information and learn more about the area, and The Main Corner/Library/Cave Gardens area is activated day and night.

In line with Recommendation 2 to create a multi-node approach to VIS, it is logical and cost effective to supplement the existing service desk at The Main Corner with Visitor Information Services as a TIER 1 VIS in Mount Gambier.

As per Recommendation 2 around TIER 1 services, VIS staff should rotate through all VIS locations, including the Lady Nelson and mobile units where-ever deployed.

### Strategies

6.1.    Establish a Tier 1 VIS approach in the foyer at The Main Corner. Ensure early stage digital FAQ information includes retail, hospitality and attractions in the immediate vicinity of The Main Corner.

6.2.    Capture visitor data (numbers, enquiries, visitor counter on the Volcano movie door) to assist refinement of VIS services from this location.

6.3.    Use this data to establish the most effective time slots for Volcano movie shows based on proposed visitor itineraries in the area and advertise additional shows at peak visitor demand (this is currently done ad hoc rather than planned in advance).

## 7. Build tourism outcomes with the Riddoch Art Gallery

### Rationale

The Riddoch Art Gallery has recently been acquired by Council with the intent of benefiting from integration with The Main Corner operations, stimulating increased patronage and improving financial sustainability.

The Riddoch Art Gallery is the largest gallery outside of Adelaide and is therefore a significant regional cultural attraction, that - when combined with an activated Kings Floor, the Volcano movie, gallery shop, Cave Gardens and adjacent Library - provides a combination of attractive visitor services and experiences in the centre of the city. This is especially important on weekends when many retailers close.

Tourism is highly visual. Accelerating the planned use of video technology capabilities will assist in promoting and interpreting the Riddoch Gallery and other attractions in the Mount Gambier area.

### Strategies

7.1.    Integrate The Main Corner and Riddoch Art Gallery activity relating to arts, culture, heritage and development of new media. This should assist in the provision of updates and refreshing of interpretive tools and short stories on the environmental, cultural and social fabric of the Mount Gambier area.

7.2.    Refresh and better utilise the Kings Floor space. Improved interpretation, particularly indigenous, would be appealing to visitors and the space could also be used more engagingly for creative community use.

7.3.    Investigate the feasibility of running technology-oriented short courses for tourism operators and local photographers to create innovative video content. Also explore the capacity to improve live stream conventions and improve conference facilities.

## 8. Consider the value of the yellow 'i' status

### Rationale

Structuring VIS operations in response to visitor needs, rather than accreditation requirements, may impact maintenance of the 'yellow i' accreditation. Recognising the dynamic and changed visitor information environment, the national 'yellow i' accreditation system is likely to alter over time.

*Diagram 5* shows the type of tasks 'yellow i's' currently undertake. Apart from taking bookings, the recommendations of this Review generally enhance Mount Gambier's capacity to support tasks that contribute to accreditation. Initial discussions with SATC indicate the agency's support for the direction of this Review and acknowledge the importance of increasing the effectiveness of Council funding for VIS to grow local visitor economies.

Diagram 5, Visitor Information Centre – roles in a distributed model (SATC, *Visitor Information Centre – the distributed model*, unpublished, 2017).



While this Review has been respectful of the preference to maintain the 'yellow i' accreditation. If future audits raise issues, the following considerations are noted:

- Visitors have little awareness of the differences between a yellow i and white i.

- It is not intended that total opening hours for Tier 1 VIS will fall below the '7 days per week' hours at the VIC, although more than one VIS service may operate at different sites at the same time at busy periods.

- The loss of 'yellow i' accreditation would have some marketing and networking implications, particularly around the loss of highway signage. DPTI controlled highways only allow signage for accredited 'yellow i' and major wayfinding signage would need to be repositioned onto Council controlled land/sites.

- Information bays and digital guidance can be used to connect visitors with the VIS service. This is particularly important given the results from a recent survey (Dec16 - Feb 17) which showed that 'road signage' was the highest listed category (25%) in response to the query 'where did you hear about this VIC?', followed by 'accommodation' (13%), word of mouth (13%) and 'website' (12%) with 1% of respondents 'Facebook'.

Strategies

8.1. Images on the highway entry point signage should be updated to promote the key visitor attractions of Mount Gambier (e.g. natural attractions and culture) to better motivate and attract potential visitors, encouraging them to stop rather than drive through.

8.2. The City of Mount Gambier should continue to be active in the State VIC Network and demonstrate the improved visitor servicing results of the multi-channel, multi-node approach.

## 9. *Revitalise Mount Gambier attractions*

### Rationale

Many of the attractions and activities currently available in Mount Gambier are poorly developed (e.g. walking tracks around the Valley complex). Many experiences are free and are not well included in destination marketing, including listing on ATDW.

Just as Parks entities across Australia have shifted to become very active tourism operators as well as tourism managers, Council needs to also identify the tourism development potential of assets under its control, and work with the private sector to improve and market these assets.

It is therefore recommended that Council reviews existing concessionaire products and contracts and additional potential sites and products and develop a long-term plan to activate the use of these to drive visitor economy outcomes. It should aim to:

- Create a range of more commercially viable, business ready opportunities.
- Improve the capacity for operators to utilise public assets.
- Be receptive to investor-driven new ideas.
- Promote its tourism assets.

Strategies

9.1. Review how Council tourism assets are portrayed as experiences or products and increase their visibility on Australian Tourism Data Warehouse (ATDW), SATC/Tourism Australia searches and Touring Route sites.

9.2. Review opportunities for tourism experiences and create a long-term plan to help activate priorities that build on Mount Gambier's brand and destination appeal.

9.3. Develop an 'open for business' approach to new investment ideas, including procurement processes that allow for co-creation of ideas and co-investment in commercial initiatives, and case management of specific initiatives.

## Attachment A - Bus ticket servicing

Analysis has been problematic as little quality data has been available. An internal analysis in Nov 2016 revealed the system for booking bus tickets was overly resource intensive. At the time, it was estimated bus ticketing was taking 59.58 hours per week and hence the annual cost was estimated at $123,000 to service this.

An improved approach to servicing bus ticketing was instigated from November onwards and the time allocation for the sale task only was recorded for the period 23-29 March 2017, showing 147 tickets were sold, taking a total of 382 minutes (6.37 hours). While this summarises actual sales only (face to face, telephone and email), *Table 1* shows it is a dramatic resource saving to the pre-November 2016 system (that averaged around 30-35 minutes per ticket sale).

*Table 1: Bus ticketing workload*

|  | Total hours / week | Hours - Sales | Hours - Enquiries (face to face, tel, email) | Hours - Other administration |
|---|---|---|---|---|
| Pre November 2016 | 59.58* | 42 | 12.24 | 31.42 |
| March 2017 | 23.95 | 6.37 |  |  |

*note this row does not tally.

It is recognised that the initial Nov 2016 time estimates made by VIC staff may have been too high and the actual time taken to service bus ticketing may have been closer to 1 FTE, but this still equated to the bus servicing running at a $72,996 loss after revenue was accounted for.

In addition, there is a downward trend in sales. The City of Mount Gambier's Annual Report for 15/16 shows a total 5540 sales, equating to an average of 107 ticket sales per week. As part of this Review the bus ticketing support from July 2016 – April 2017 was analysed and the weekly sales level is around 90 tickets per week based on the data shown in the Table 2 below. Monthly sales levels varied from a low of 592 (Feb) to 1031 (Jan) per month. Just under 13% of all sales and queries were via email/ tel enquiries and the remainder were face-to-face (with no significant variation between the two bus companies).

*Table 2: Bus sales and query levels*

|  | PR/ST Counter | PR/ST Electronic/ tel | PR/ST Sub-total | VLINE Counter | VLINE Electronic/ tel | VLINE Sub-total | Total (both) |
|---|---|---|---|---|---|---|---|
| Sales only |  |  | 1692 |  |  | 2019 | 3711 |
| Queries only |  |  | 1588 |  |  | 2107 | 3695 |
| Queries/ sales | 2855 | 425 | 3280 | 3602 | 524 | 4126 | 7406 |

## Attachment B - Two years' time – Our Mount Gambier



Sophie and I pulled into Warrnambool. We had finally got away on our two-week holiday and decided to make the most of our break from Melbourne, heading west in our brand new RV, getting used to travelling in it before we both retired permanently in a few more years and did some longer trips.

When we bought the vehicle, it came with great discount set of offers for the Mount Gambier area just over the border in South Australia. What a great idea as a first break, not far from Melbourne with everything we like - wine, coastline, heritage and walks in volcanic landscapes that I vaguely recall from our kid's school trip days! We realised we hadn't been there for 20 years at least, so made it our first road trip.

I decided to bypass the Great Ocean Road, stay away from all those buses and we'd seen it before. Further west was where we wanted to spend time exploring. The Warrnambool VIC was friendly and helpful – I wanted to know where to get my surf rod wet and Sophie wanted the foodie trail information so she could pull out the deck chair, a book and wine while I fished. The staff put us straight onto a dedicated tablet linked to Discover Mount Gambier's website. We bookmarked it on our mobiles and they gave us some navigation tips to get straight to the answers we wanted.

It was a bit windy in Port MacDonnell, our first stop, so the next morning we pushed onto Mount Gambier, after stretching our legs up Mount Schank. I was still a little nervous with the size of the RV but the website showed us big vehicle parking spots, and I programmed in Lady Nelson Visitor Information Services and the GPS guided me straight to the well laid out carpark (I didn't have to reverse).

Yes, the clean toilets were our first stop and then I found Sophie was already talking to one of the local volunteers, Susie, who was keen to provide recommendations for the best coffee in town, some good sourdough bread and where to buy local food. We already knew we can search around the Mount Gambier website quite easily, but the volunteer walked us over to a nearby computer terminal, which was well designed at standing height so we didn't need to find stools and perch over her shoulder, and she quickly showed us a few search tips and then helped us save our answers into an 'information shopping basket'. The shopping basket saved our itinerary and gave us some great tips on using the Tourism Mount Gambier discount book we'd got with our RV purchase. We chose to email our 'shopping basket' information to ourselves so we both had the answers on our own phones, but Susie also offered free printing if we wanted a hard copy. Electronic was perfect for us and I knew I'd lose that piece of paper that told us tomorrow's Engelbrecht cave tour times.

Sophie was very happy because she found out the local insights on the farmer's market stalls and food that was in season. It looked like we needed at least two nights here so we asked

about where to stay overnight and how to get around as I wanted to avoid driving the big RV in tight city traffic.

The website had a RV friendly Mount Gambier city map, showing how to get to the top 10 sites (and the supermarkets, service stations, dump points, and RV overnight stops) ….wow they had really thought about people like me!  The only question we stumped them on was surf fishing spots. Our volunteer popped back into an office to check with the Council staff. She came back with some further information about a fishing charter, and said that I could book on the operator website, or register stand by interest and they would confirm with a geo-located text alert.

We zipped into town feeling much more confident, parked the RV at Olympic Park and wandered through the Railway Lands. We took a selfie next to the Mount Gambier Blue Bus – the funky painted mobile visitor information service centre – that was parked ready for a music festival and while we logged onto the free wifi hot spot they gave us more information about the festival. I posted the page on Facebook just to remind all our friends we were having fun on holiday while they were back at work.

I broached the topic of fishing with Sophie. Surprisingly she said 'go for it' as she'd realised she could do some great walks around the Blue Lake complex, and browse the town shops all on foot – she would fine for a day and didn't have me impeding her shopping time!

I could have registered for the fishing charter on my phone, but we were passing The Main Corner, one of our must-visit spots. The young volunteer at The Main Corner knew exactly what I was talking about – he thought the tuna were running and showed me some photos of enormous fish that recent visitors had posted on the Discover Mount Gambier Facebook page. The volunteer helped me click through to the booking site and printed my confirmation.

Sophie had lost interest in fishing and I found her immersed in the virtual reality interpretive imagery of the Riddoch Art Gallery around the rich indigenous history, and adding the volcano movie times into her mobile calendar for tomorrow…I've seen that look on her face before and think we may be 4 nights here not 3. The visitor information volunteer asked us where we were staying, and as we were unsure, he also gave us a  RV overnight spot and put the address into the GPS app on my phone. This was so easy, and we thoroughly enjoyed talking to locals and hearing what they're passionate about.

We are really looking forward to doing a bit of bragging to our Melbourne friends about this place.

## Attachment C - Souvenirs

The Lady Nelson Centre has a small array of retail stock – ranging from ice-cream through to key rings and some local produce. The sale of souvenirs provides a small revenue stream ($23,755 gross profit for 2015/16, not accounting for staff time).

Turnover is analysed monthly using Point Of Sale records and stocktakes, and lines and products re-stocked as needed. The highest selling items are small priced and sized items such as postcards, key rings and magnets. South Australian suppliers are used where ever possible and postcards are now printed locally to increase the economic flow-on benefits.

While VICs nationally are encouraged to sell local produce (especially food, beverages and creative products) and to source local items for sale, the small profits generated often do not outweigh the administrative costs, and there can be tension between VICs and retailers who perceive that VICs are government funded and should not be competing with the private sector. The souvenir space at the Lady Nelson is small and hence limited in what can be displayed. Visitors are encouraged to head into the city and shop at the local stores for a full range of products.

The recommendation of this Review is to review sales with the intent of discontinuing sales items and refocusing staff time on VIS. While some impulse buying opportunities may be lost, the management of retail items takes staff time away from the core focus of VIS.

This Review recommends three initial Tier 1 VIS sites, retail sales at each will be different:

- Lady Nelson – consider removal of all cash transactions, but for visitor amenity keep vending machines for cold drinks in summer and a hot drink machine for winter to encourage people to stay longer while reviewing information. Visitors wanting souvenirs, historical CDs, books, maps etc. should be encouraged to visit the city centre and buy from The Main Corner or a local retailer.

- The Main Corner has a point of sale cash system for the art shop. The VIS may sell some maps and historical CDs but this should be kept to a minimum and local retailers encouraged to stock magnets, postcards etc.

- Umpherston Sinkhole concessionaire (and most festival / event venues) already sell drinks and local souvenirs so the mobile unit should not stock these.

The operators of Tier 2 VIS locations should determine souvenirs/ map stocks based on their own space and business situation.

## Attachment D - Direct bookings and 'lost' sales

Many VICs across Australia take direct bookings with commission, thus boosting their financial viability and allowing them to maintain a close working relationship with industry and ensure immediate conversion for sales of accommodation and activities. Mount Gambier has not adopted this model and in the past had little interest from industry in this approach. Some ipads were installed in the Lady Nelson so visitors can make direct bookings, although anecdotally there is some hesitation, particularly from older patrons, around using credit card details on a public computer. Increasingly people are using the VIC free wifi to book directly on their own devices, so this issue is expected to diminish over time.

Direct bookings boost operator profits. Many operators participate in aggregator sites (currently a very competitive part of the market) which generate strong enquiries and support consumer expectation of direct bookings. The consumer often pays the commission which is bundled into the final price.

Based on current knowledge it is recommended that the VIC does not adopt a booking approach but works very closely with industry to direct visitors to operator or aggregator websites, and keeps a watching brief on this area.

While driving conversion (actual bookings) is critical in the sales cycle, the potential lost business from the Mount Gambier VIS approach appears quite low. Using the current annual visitor numbers of the Lady Nelson Centre, and the average figures of actual conversion by SA VICs that do take bookings (Tourism Research Australia, *The Impacts of Regional Visitor Information Centres on Visitor Behaviour in South Australia,* 2011-12) see *Table 3*, Column 2:

- Around 413 accommodation bookings would be made annually if the Mount Gambier VIS also took bookings.

- Column 3 shows the same analysis using the actual number of counter enquiries received by the Lady Nelson from non-Mount Gambier residents. This suggests that only 229 accommodation bookings for Mount Gambier would have been made in the 2015-16.

- The method of analysis using SA averages has been checked with VIC Team Leader and the state figures appear reasonably similar to known characteristics of Lady Nelson numbers.

- If a commission of 15% was charged by the VIS for each transaction and the average cost of each transaction was $150, the annual revenue for the VIS would be between $5152 (column 3 analysis) and $9292 (column 2 analysis).

- Analysis undertaken by another South Australian VIC found that it took an average of 20-25 minutes to manage a query and make an accommodation booking and the VIC was getting around $12 per booking commission, and the process is not considered cost effective.

- Further costs include VIC online bookable software (cheapest is approximately $100/month (SATC pers. comm.)) and there are substantial training and staff resource requirements to keep the system accurate and up to date, and supported by local industry.

While bookings are not considered a current priority, it should be reconsidered in the future if it becomes an industry priority.

*Table 3 Potential accommodation sale levels at Mount Gambier VIC*

| Average statistics from across South Australian VICs 2015/16 | 2015/16 - all visitors to Lady Nelson | 2015/16 counter enquiries at Lady Nelson by non-Mount Gambier residents |
|---|---|---|
| Visitors | 75,000 | 46,176 |
| 85% of all visitors speak to staff person | 63750 | |
| 5% of SA conversations create a booking at VIC* | 3188 | 2309 |
| Of all VIC bookings 24% are accommodation | 765 | 554 |
| Of all accommodation bookings 54% are in area | 413 | 229 |

*The SA average is substantially lower than other states, with Western Australia study (Tourism Research Australia, *The Influence of Western Australian Visitor Centres on Tourist Behaviour*, Sept 2015) showing 19% of VIC users made a booking (mostly guided tours) and in NSW 17% of VIC visitors purchased bookable product (Tourism Research Australia, *Visitor Information Servicing in New South Wales*, June 2016).

## Attachment E - Initial considerations for functionality of website

Website functionality should be planned in detail based on content and marketing requirements. Note this list is not exhaustive but notes some considerations that have come up during the course of this Review and can provide input to this process:

- A visitor-centric, destination marketing approach.

- Build visitor engagement and encourage high levels of advocacy from visitors.

- Mobile friendly as well as tablet / computer friendly with the capacity to integrate with a 24-hour computer touch screen to replace 'night packs' at the Lady Nelson Centre.

- Build a database to encourage repeat visitation.

- Comprehensive VIS material.

- Support social media largely driven by TMG.

- An 'information shopping basket' enabling individuals to personalise their information needs. This can be saved, shared or printed.

- Readily update-able, including provision for operators to maintain their own information and be automated reminders to update information, which is necessary to remain viewable on the site.

- Ability to feature and/or support operators, such as award winners, new start-ups, achievement of high accreditation levels, or features such as a 'giving back' - conservation, heritage, social oriented program etc.

- Easy connections to facilitate online bookability (not suggested as part of this website, but it should facilitate simple and secure connections to bookable sites), see Attachment D *Direct bookings.*

- Tactical marketing and paid advertising needs, ideally in specific tabs such as 'hot deals' and 'stay and play packages', separate from 'factual' VIS information.

- Events and festivals information and links.

- Enhanced listings (possibly after a year or two so that the site is comprehensive in the first iteration) to encourage TMG membership.

- Ability to add further functionality as the site grows.

- Introduce 'live chat' facilities to the website and monitor peak usage to better support visitor planning stage - consider flexible work arrangements so that staff respond during evening periods which are likely to generate peak enquiries.

- Language sections (or translator links) for priority international markets.

- Well-developed analytics to assist on-going development.

## Attachment F - Revised VIS staff tasks and workloads

The current VIC staffing structure and skill set will need to be adjusted. The new approach will require:

- A strategic coordination role that ensures staff and volunteers are deployed efficiently over multiple sites.

- Strong digital skills to connect and influence potential visitors at each stage of the travel cycle.

- Tasks that focus on 'pure' delivery of VIS and visitor economy outcomes.

- Flexibility in work sites and times.

- Collaboration with the local tourism industry and other parts of Council.

- Quality KPIs that clearly connect with desired outcomes.


Staff will need to have:

- High digital literacy.

- Curatorial (digital content) skills.

- Close working relations with industry to leverage and work together to seamlessly support visitor needs and grow tourism in the area.

- Close working relations with events and other parts of Council particularly economic development, to grow tourism opportunities. This includes working closely with the Riddoch Art Gallery around video and development of contemporary interpretive and story telling options.

- Skills to support operator upskilling.

- Volunteer management skills.

- Multi-skilling and flexibility as individual staff may not be anchored to one site.

- Meet and greet strengths across functions (e.g. gallery) and sites (e.g. mobile unit at field days).

- Statistical literacy to use the systems to produce meaningful data around visitation that allows better evidence based decision making by both council and industry.

Volunteers will undertake the majority of the face to face support role for visitors.


### FTEs and budgets

Staffing options shown do not exceed current FTEs. However, there are two higher salaried positions (Visitor Services Team Leader and Data and Digital Officer) which have increased the average cost per FTE. The Options shown on Pages 39 - 41 show FTE and budget implications.

## Proposed staffing structure
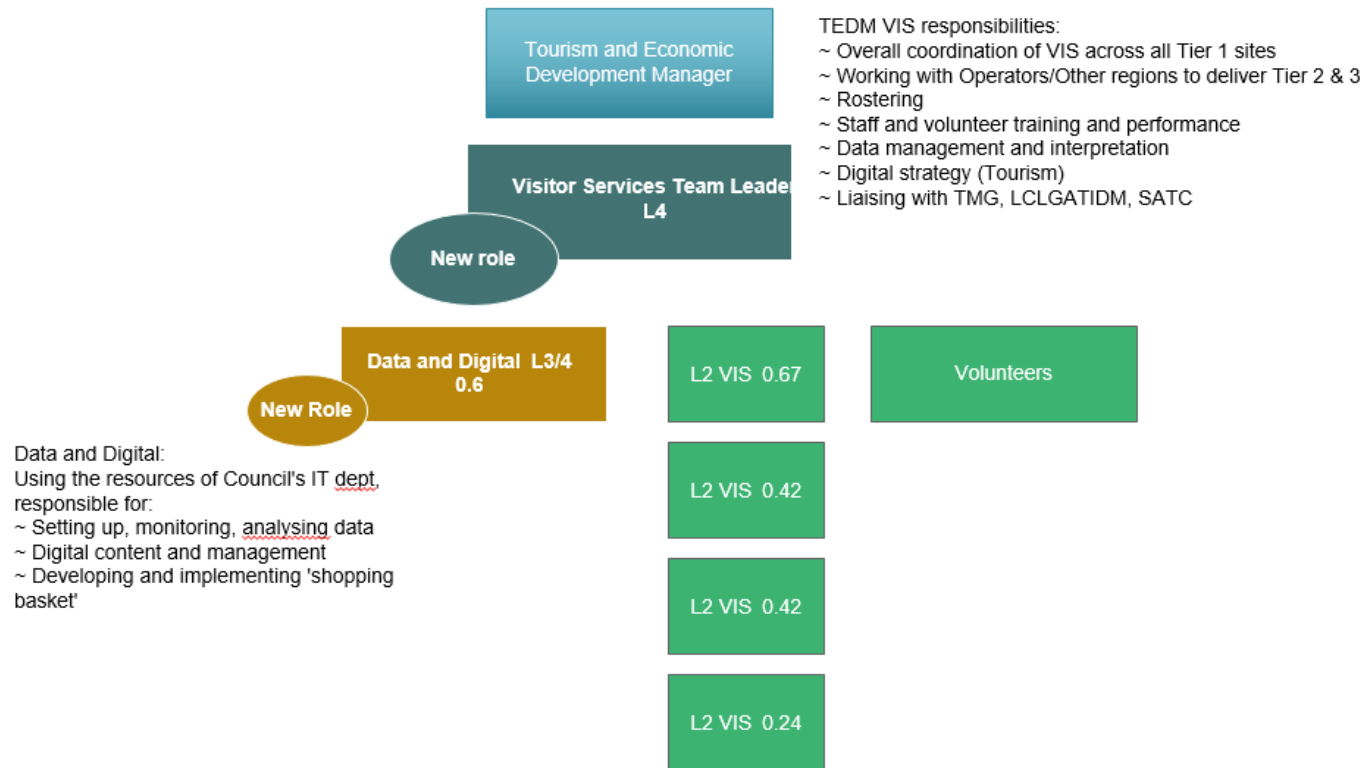


Under the proposed model, two higher skilled positions will be required:

1.  Visitor Services Team Leader, a strategic and coordination role; and

2.  Data and Digital, to provide the digital capacity.

Both are expected to be Level 4 positions. Two part time VIS staff will be retained to provide core rostering availability, with the bulk of face-to-face VIS services will be provided by volunteers.

## Staffing options

The following three staffing options provide summary costings and FTEs for the current staffing structure, a fully transitioned Council structure, and an outsourced Lady Nelson VIS structure. Option 1 'no change' is not recommended and not considered viable. Either Option 2 or Option 3 can be implemented - depending on industry interest in operating the Lady Nelson VIS. Alternatively Council can establish Option 2 in the short term and adapt it over time to include elements of Option 3. Both Option 2 &3 are scaleable as other mobile/VIS sites can be added if there is sufficient demand and resourcing.

### *Option 1 - No change*

Current staffing:

- Total 3.38 FTE, comprising:
    - 0.2 FTE Manager time
    - Level 3: 1.0 VIC Team Leader
    - Level 2: 2 x 0.67 FTE and 2 x 0.42 VIC staff
- No volunteers or dedicated Digital and Data role

**Continuation of this structure will not deliver the recommendations of this Review.**

The Digital and Data role is integral to the model. Simply replacing some paid staff with volunteers at the Lady Nelson and redeploying staff to other sites (TMC, mobile) without the Data and Digital role will set up the model to fail, as staff (paid, volunteer and industry partners delivering Tiers 2 and 3) will lack the essential information platform to support a distributed/hub and spoke model.

### *Option 2: Lady Nelson staffed 7 days, minimum TMC and mobile VIS*

- This option prioritises Lady Nelson VIS over TMC and mobile deployment.

- Retains VIC accreditation, with paid staff present but not always front of house.

- Reduced paid FTEs at Lady Nelson VIS, opening times also covered by volunteers.

- Neutral effect on current estimated budget.

- Relies on 1.7 FTEs in volunteer time (approx 16 shifts at 4 hours per shift).

| Deployment of staff (hours weekly) | Paid staff | Volunteers | Cost (inc on-costs) | Notes |
|---|---|---|---|---|
| Lady Nelson VIS | 47 | 35 | $2,037.56 | a |
| The Main Corner | | 18.5 | | b |
| Mobile | 10.5 | 10.5 | $455.20 | c |
| Mobile travel/accommodation costs | | | $800.00 | d |
| Data and digital | 24 | | $1,258.89 | |
| Management | 20 | | $1,049.07 | |
| Industry training and networking | | | $250.00 | e |

| Deployment of staff (hours weekly) | Paid staff | Volunteers | Cost (inc on-costs) | Notes |
|---|---|---|---|---|
| Total | 101.5 | 61.98 | $5,850.73 | |
| Cost per annum | | | $304,237.74 | |
| Cost difference current model | | | $152.24 | |
| FTE equivalent | 2.71 | 1.71 | | |

*Notes*

a    Paid staff: 1 to cover 5 days x 8 hours per day plus 9 hours for other duties - budget includes loadings for weekend work
Volunteers: to cover busy times and breaks (7 days x 5 hours) with supervision by paid staff at site. Note that this is the minimum number of volunteers, and it is likely that additional volunteers will be involved so that there is more than one person on duty to make the role more enjoyable.

b    TMC paid staff to cover opening hours, Volunteers @ 33% for busy periods/events

c    Paid staff hours, Volunteer hours

d    2 x overnight stays p/a x 2 people (includes petrol, meals, accommodation)

e    All options include $250 per week for industry training and networking

## Option 3: Lady Nelson VIS outsourced

This option assumes VIS is provided within the cost structures of a commercial operation at the Lady Nelson VIS.

- Outsourcing the Lady Nelson VIS releases additional Council paid and volunteer staff time for:
  - TMC (16 paid hours), continues 18.5 hours of volunteer time.
  - Mobile paid staff and volunteers increased to 20 hours per week respectively.
  - Additional overnight trips for mobile unit (5 in total).
- Can retain VIC accreditation.
- Reduced paid FTEs (from 3.38 to 2.13).
- A reduction of $20,886.89 on current estimated budget.
- Relies on 1.03 FTE in volunteer time (approx 10 shifts at 4 hours per shift).

| Deployment of staff (hours weekly) | Paid staff | Volunteers | Cost (inc on-costs) | Notes |
|---|---|---|---|---|
| Lady Nelson VIS | | | | a |
| The Main Corner | 16 | 18.5 | $ 693.64 | b |
| Mobile | 20 | 20 | $867.05 | c |
| Mobile travel/accommodation costs | | | $1,333.33 | d |
| Data and digital | 24 | | $1,258.89 | |
| Management | 20 | | $1,049.07 | |
| Industry training and networking | | | $250.00 | e |

| Deployment of staff (hours weekly) | Paid staff | Volunteers | Cost (inc on-costs) | Notes |
|---|---|---|---|---|
| Total | 80 | 38.48 | $5,451.98 | a |
| Cost per annum | | | $283,503.09 | |
| Cost difference current model | | | **- $20,886.89** | |
| FTE equivalent | 2.13 | 1.03 | | |

*Notes*

a     Contractor provides VIS at Lady Nelson

b     VIS paid staff at busy periods (~ 2 days p/w), Volunteers @ 33% for busy periods/events, TMC paid staff to cover opening hours

c     Paid staff 20 hours p/w, Volunteer 2 days p/w

d     5 x overnight stays p/a x 2 people (includes petrol, meals, accommodation)

e     All options include $250 per week for industry training and networking

## Attachment G - Draft Timeline for Implementation

The exact timeline for implementation will be dependent on operational aspects around staffing, budgets and commercial options. The suggested approach is outlined below.

### Stage 1: Structure, training and culture – first six months

*This stage initiates the changes needed: the new staffing structure will be in place, key content digitised, mobile unit procured and essential elements of the Lady Nelson building made 'fit for purpose'. This will create the core requirements and platform for the implementation of the new VIS model.*

1   Initiate a clear communication plan to engage with others and gain their assistance in implementation.

2   Strengthen team approach within council between VIS, events and economic development to support major changes.

3   Implement staffing restructure with new KPIs, training and enhanced volunteer roles.

4   Work with TMG to create a single website meeting Mount Gambier's tourism needs, including the development of a Tourism Marketing Strategy, that includes digital content to guide the web development.

5   Upgrade public wifi capacity at key locations, as needed.

6   Work with local operators to ensure a smooth transition from brochure focus to digital material.

7   Create digital content – focussing on highest priority areas.

8   Establish Tier 1 VIS: Lady Nelson, The Main Corner and mobile unit.

9   Review concessionaire contracts to enable visitor reporting requirements to be added.

### Stage 2: Pilot and launch new approach – second six months

*At the end of this stage the new VIS model will have been introduced and the 'bugs' ironed out.*

1   Launch new website.

2   Alter road signage to new VIS sites and include contemporary tourism experience images in city entrance signage.

3   Activate Tier 2 operations with local operators.

4   Seek formal EOIs for Eco Dev/Tourism space at the Lady Nelson and determine optimal use of the space - refit as necessary.

5   Identify and scope data collection: visitor tracking (including smart phone), concessionaire reporting of visitation, door counts (Volcano movie), event reporting, vehicle counts to inform the location and timing of VIS.

6   Continue to review digital assets and work with partners to coordinate.

## Stage 3: Refinement

*At the end of this stage the new VIS model will be fully operational, and a review undertaken to guide next stages of development.*

1. Implement Tier 3 connections in other regions.

2. Develop more motivational digital content, particularly video.

3. Refresh Kings Floor space to improve experience/interpretation.

4. Use analytics and usage data to update approach in conjunction with operators and tourism partners.

5. Activate targeted marketing around data on specific user groups (visitor and potential visitor data).

6. Review approach and consider additional mobile vans or new permanent delivery sites at key proven locations.

7. Evaluate approach and ensure it is able to support all parts of Mount Gambier's Visitor Economy.

# Attachment H - Indicative Cost of Recommendations

This Review will require additional funds to implement the recommended changes but should be approximately resource neutral in Council operating costs when compared with previous VIC operations.

While the staff tasks will be altered considerably, there is no increase in the number of staff.

The major long term cost to Council is operation of the Lady Nelson building. Currently all costs are attributed to VIS, under the proposed approach a smaller portion would be allocated to VIS functions. Attribution of the remaining building and maintenance costs will depend on final tenancy but it is expected some may be attributed to the Economic Development Division of Council (due to co-location of staff) and up to half of the space within the building may be leased to an alternate entity, thus generating new revenues.

Core costings are as follows and details are shown in *Table 4*.

## Explanation of fit out and digital costs

Repurposing of Lady Nelson:

> Initial discussions with the Council architect indicate repurposing of the approximately 800m$^2$ building may cost around 1500/m$^2$ and hence require a total investment in the order of $1.2m.

Repurposing of The Main Centre:

> Is not expected to require significant funds but a contingency of $5000 has been included. Terminal, flat screens and tablet costs are costed separately.

Kings Floor:

> Alteration costs for the Kings Floor area (and adjacent space) have not been costed and changes to use are not recommended until a review of visitor patterns and spatial planning have been undertaken. Cost of this review and planning have not been included.

Mobile van/s:

> Have been costed at the higher end of the range - up to $47,500. Mobile offices or caravans are available second hand but may need some refitting and it is recommended that a stylish eye-catching whole wrap is applied, so visitors easily see it and recognise its purpose from a distance, but cheaper alternatives are also possible.  There are several approaches to the mobile unit, from semi-permanent mobile site offices through to rental vans that can be used for a few days for major festivals and peak loads. External display awnings and under cover shelter can create flexible fit-for-purpose options.

Automated bus ticketing:

> Is recommended to replace the current time-intensive system and eliminate cash transactions. It is assumed that V-line and Premier would pay for the machines, with Council contributing rent-free internal placement in the Lady Nelson site. Further Council savings relating to administration would also be realised.

Website and digital content:

> The recommendation for a single comprehensive website and digitalisation of content have been costed across two years (see Attachments E and H). Because

of the implications on operator's own businesses, including a responsibility to keep information up to date and engaging in opportunities around provision of Tier 2 nodes and collective marketing, recommendations to improve the digital skills of operators have been included.

On-going VIS work:

- Staff salaries, superannuation, and ongoing insurances etc. are estimated as cost neutral (refer *Attachment F - Staffing options*).
- Operating expenses will change to include more time and graphic art costs in development of online content. Operating expenses will include skills development and establishing appropriate platforms for software and digital content.
- Reduced revenues from sales will impact (total income 2016 was $75,042 including souvenir income of $23,755) but staff time in managing sales will be recouped. New sources may be available such as from advertising (flat screen TVs and other opportunities) and collaborative marketing projects, as well as the potential to lease out part of the Lady Nelson Centre building.

Further stages have not been costed as the exact nature and scale of the work required is not yet clear. Future costs are likely to include:

- Road signage changes
- Reviewing visitor use and recommendations for upgrading the Kings Floor/ Volcano movie area.
- The cost of upgrading and revitalising Council's commercial tourism product, particularly attractions/ experiences (Recommendation 9).
- Technical training courses and support associated with future changes at the Riddoch Art Gallery.

## Costing details

Note, cost estimates have been obtained from exemplar providers (such as *Easyweb)*. Actual costs may alter.

*Table 4: Costing details*

| VIS COSTS, One-off | price per unit | number of units | Total | comment |
|---|---|---|---|---|
| | | | | |
| *Lady Nelson* | | | | |
| Refit of the Lady Nelson building | $1,200,000 | 1 | $1,200,000 | Structure, floor coverings and fixtures |
| Large wall mounted TVs playing short video clips on locations/ experiences | $800 | 3 | $2,400 | Engaging interesting material to watch if people waiting |
| Touchscreen to access web - visitor use or with volunteer assistance | $6,966 | 3 | $20,898 | Easyweb digital 32" ex GST installed cost |
| Portable tablet used by staff/volunteers | $300 | 3 | $900 | Off the shelf android, particularly for detailed queries on other locations |
| 1x 24 hour access through-glass touchscreen | $13,674 | 1 | $13,674 | Easyweb 46" NEC |
| Large table | $2,000 | 1 | $2,000 | 2.4m x 1.2m type size |
| Chairs – easy move | $300 | 10 | $3,000 | Various styles as needed |
| Coffee machine – simple easy | | | | Cost neutral |
| *Sub-total* | | | *$1,242,872* | |
| | | | | |
| *The Main Corner* | | | | |
| Minor furniture and re-purposing allocation | $5,000 | 1 | $5,000 | |
| Large touchscreens | $6,966 | 2 | $13,932 | Easyweb digital 32" ex GST installed cost |
| Small portable tablet used by staff/volunteers | $300 | 3 | $900 | Off the shelf android, particularly for detailed queries on other locations |
| *Sub-total* | | | *$19,832* | |

| VIS COSTS, One-off | price per unit | number of units | Total | comment |
|---|---|---|---|---|
| *Umpherston Sinkhole – mobile* | | | | |
| Small portable tablet used by staff/volunteers | $300 | 3 | $900 | Off the shelf android, particularly for detailed queries on other locations |
| Public wifi installation | $8,000 | 1 | $8,000 | Cost $2-10,000 depending on nearby infrastructure |
| Portable van | $25,000 | 1 | $25,000 | See detailed description |
| Additional mobile van start up costs | $22,000 | | $22,000 | Modifications, artwork design, full vinyl wrap and annex and displays |
| *Sub-total* | | | *$55,900* | |
| | | | | |
| *OTHER VIS change-over costs* | | | | |
| Website | $90,000 | | $90,000 | Across two years |
| Operator skill development and Tier 2 support | $20,000 | | $20,000 | Estimated allocation |
| *Sub-total* | | | $110,000 | |
| | | | | |
| *TOTAL PROJECTED ONE-OFF COSTS* | | | **$1,428,604** | |

| NEW ANNUAL NON-STAFF COSTS | price per unit | number of units | Total | comment |
|---|---|---|---|---|
| Web improvements | $5,000 | | $5,000 | Estimate based on a quality initial build and internal capacity to update |
| Management of public wifi customer database development | $6,546 | | $6,546 | Easyweb estimated costing |
| *TOTAL* | | | *$11,546* | *Note potential for revenue off-set* |

## Attachment I - Linkages with Digital Strategy

This set of recommendations strongly aligns and supports the recommendations of the Digital Strategy.

The five strategic areas for Action (p13 of the *Digital Strategy*) note:

- o Equitable access to technology for everyone
- o Small business will be a key driver economically
- o Support local innovation
- o Tourism presents good opportunities
- o Importance of compelling stories about Mount Gambier

The recommendations here support these with a focus on supporting the whole visitor economy not just the formal/operator elements of the tourism industry  and the importance of connecting to other significant opportunities within Mount Gambier, particularly the Riddoch Art Gallery and the university digital connection.

*Table 5* shows the actions within the Digital Strategy that connect directly to this Review recommendations

*Table 5 Connections with Digital Strategy*

| Digital Strategy Action | Page ref | Connection with this Review and recommendations |
|---|---|---|
| 1.1  Develop Free Wifi Hotspot Network | 20 | Will be needed by visitors to access VIS |
| 2.2  Provide training for Digital history | 24 | Will support the rich digital content with interpretation of MG past |
| 2.3  Facilitate advice and resources for small business | 24 | Build the capacity of the tourism industry |
| 2.4  Provide digital leadership from council | 25 | The VIS recommendations will assist this |
| 2.5  Build digital communication and branding | 25 | The Discover Mount Gambier website will support this |
| 3.2  Develop a register of businesses | 29 | This will support the VIS queries |
| 3.3  Assemble tourist behaviour data | 29 | The better connection with all visitors online will enable back of house data collection systems as well as proactive data collation |
| 3.4  Assemble foot traffic data | | Geo-tracking of all foot traffic will assist, but may be able to separate local and visitors for added depth of analysis |
| 4.2  Establish a digital innovation hub | 34 | The Lady Nelson Centre may provide a suitable location? |
| 5.1  Refine key Mount Gambier websites | 41 | A recommendation of this review |
| 5.2  Implement search engine optimisation and re-marketing | 41 | A key action once a new website is in place for Mount Gambier |

| Digital Strategy Action | Page ref | Connection with this Review and recommendations |
|---|---|---|
| 5.3 Develop a visitor App | 42 | Consider an App or a more flexible website based on visitor needs and preferences |
| 5.4 Establish innovative engagement projects | 42 | Projects such as this are ideal once the new tourism partnership approach is in place |
| 5.7 Facilitate engagement with new market social media | 42 | Projects such as this are ideal once the new tourism partnership approach is in place |
| 5.8 Select and implement a whatson platform and app | 42 | Projects such as this are ideal once the new tourism partnership approach is in place and utilising existing widespread systems such as 'whatsonin' may work well |
| 5.9  Reimagine and redevelop Visitor Centres as 'digital first' channels to market | 43 | A key focus on the recommendations of this Review |

## Attachment J - Linkages with the Tourism Mount Gambier Strategic Plan

The greatest outcomes in terms of growing the tourism industry will be achieved by further strengthening and embedding the partnership approach already adopted between Council and TMG. This Review reinforces and supports the current TMG Strategic Plan. *Table 6* shows indicative actions the VIS could undertake to deliver relevant aspects of the TMG Strategic Plan. The final workload of the VIS team will need to be developed in detail, and clear actions and responsibilities developed for areas where partnership projects are developed.

*Table 6 Connections with TMG Strategy*

| TMG objective | VIS support action |
|---|---|
| 1.1 Facilitate development of the self drive market for MG with emphasis on the Melb-Adel touring route | Upgraded website supports the VIS needs of the self-drive touring market |
| | Support travel planning process of FIT (free and independent travellers) touring visitors |
| | Link with VICs and other partners on route to ensure strong MG information provision |
| 1.2 Upgraded airport facilities | Work with airport to ensure good promotion of VIS website and information |
| 1.3 Develop international markets | Ensure website has foreign language capacity readily visible (based on priority needs). Monitor international visitor numbers and note priority areas for additional translation servicing. |
| | Itinerary planning component of web will support international trade |
| 1.4 Event Tourism | Provide mobile VIS at key events |
| | Provide targeted and contemporary information to potential event visitors to increase, length of stay and repeat visitation |
| 2.1.6  Provide a peak representative body for tourism | Work collaboratively on agreed projects |
| 3   Promote Mount Gambier as a tourism destination | Work closely with TMG and provide, maintain and refresh rich, experiential digital content that will attract tourists to Mount Gambier. |
| | Support TMG social media through content provision. |
| | Provide quality VIS at each stage of the travel cycle and particularly to visitors while they are in Mount Gambier. |

| TMG objective | VIS support action |
|---|---|
| | Work collaboratively with industry and other parts of Council to build the visitor experience and customer service |
| | Use online tools to source data on visitors and potential visitors and create and manage a customer database |
| | Work with partners to develop photo opportunity locations around Mount Gambier to drive visitor word of mouth and advocacy |
| 4 Increase tourism expenditure by promoting new tourism product and services | Use e-newsletter to visitor database to showcase upcoming events, festivals, new exhibitions and experiences and work with TMG to also create packages |
| | Use VIS locations to feature new experiences and products (such as via flat screen TVs as well as website features) |