

Local Government and Tourism

*The Contribution of Local Government to the Australian
Tourism Industry*

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Prepared for: Australian Regional Tourism Network

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Australian Government
Austrade



Government
of South Australia

South Australian
Tourism Commission



FOREWORD

The process to enable this research on Local Government spend on Tourism commenced back at a 2013 Tourism Ministers' meeting. At this meeting two major Tourism Associations presented the need for more funding to be allocated to marketing without knowledge of the current spend. At that meeting the Australian Regional Tourism Network (ARTN) raised the importance of Local Government in the Tourism space.

The ARTN has long held the opinion that Local Government is a major player in both Tourism and the Visitor Economy on both the supply and demand side. From that original discussion the ARTN engaged with Austrade, and the Australian Local Government Association to bring this tide changing research into reality. Minister Robb, Minister Colbeck and ALGA's President, all realised the importance and supported this research.

The ARTN approached the State Tourism Organisations(STO) to support this research and the ARTN takes this opportunity to thank the supportive STO's.

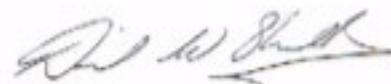
A working group was formed in April 2016 and a research company was appointed shortly after. On appointing an organisation to conduct the research the ARTN believed it best to look beyond the standard Tourism Consultants or Tourism Research Companies that could give us an 'out of the square' perspective.

What makes this research different and interesting? Firstly it has never been compiled before and secondly the critical key performance indicator for the researchers was that all of the 561 Australian Local Councils be contacted, the only exception being the Australian Capital Territory. This resulted in giving every Local Council across our nation the opportunity to participate. The response to the survey exceeded expectations with a significant 256 Local Councils responding. This was a clear indication of the high level of interest Local Government held for the research outcomes.

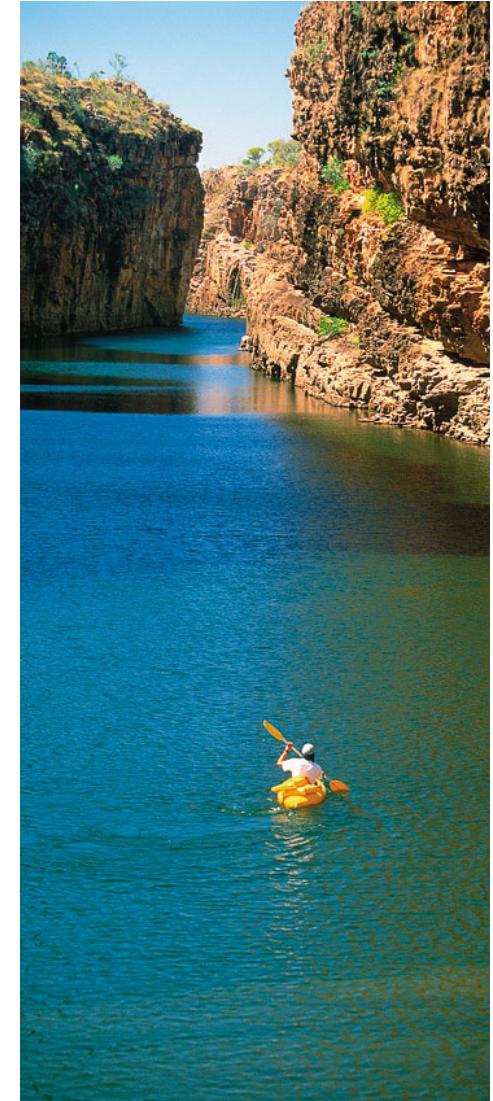
The evidence based results are pleasing and should open much debate on where Local Governments sit in the Visitor Economy space. The results of this research will be used to demonstrate the importance of Local Government when policies are formulated and enabling infrastructure discussed.

I personally wish to thank all those involved with special mention to DBM Consultants Simon Pomfret, the working group, the focus groups, all local governments who participated and the ARTN's Executive Officer Greg Binskin.

I am delighted to present this research and I look forward to working with the industry and levels of government to develop evidenced based policy and actions .



David Sheldon
Chair - ARTN



SUMMARY OF KEY RESULTS



In 2015/16 Local Government in Australia spent an estimated \$373M on the operation of visitor information centres, events, festivals, promotion, marketing and development of Tourism.



Two thirds (\$250M) of Local Government spending on Tourism was undertaken by Councils located in regional and remote areas.



35 cents of every dollar spent went on operating visitor information centres.



Eight in 10 Councils directly employ staff that have a Tourism role. This equated to estimated total of 1,672 full-time equivalents.



Employment costs for individuals employed by Councils in Tourism roles was estimated at \$179M in 2015/16. This equated to 48% of Local Government spending on the operation of visitor information centres, promotion, marketing and development of Tourism.



Nine in ten Councils agreed that Tourism offers future economic development opportunities for their local area.

Background and Research Objectives



BACKGROUND

Local Government key player in Tourism



Local government plays a significant role in tourism across metropolitan, regional and remote areas of Australia. Councils are critical in determining the level and quality of visitor services and infrastructure, the events that take place and the public money that is invested in destinations.

They also support local experiences which attract visitors, such as museums, art galleries, events and festivals. Councils invest in infrastructure such as visitor centres, ports, airports, stadia, parks and gardens, as well as taking responsibility for roads, removal of sewerage and waste, signage and the creation of a safe environment for visitors to enjoy.

Local Councils in Australia resource tourism to varying degrees, commensurate with the importance of the industry at the regional level. Regional and rural Councils are under pressure to increase expenditure in Tourism to compensate for declining employment levels in traditional industries, such as manufacturing, mining and agriculture.

The Australian Regional Tourism Network, in partnership with Austrade, is seeking to understand the level of expenditure and direct employment of local government in Tourism.

RESEARCH OBJECTIVES

The survey focused on local government spending in operating visitor information centres, and promotion, marketing and development of Tourism



This research was specifically designed to:

- Evaluate local government's understanding of their role in Tourism by
 - Assessing attitudes towards future investment in Tourism
 - Understanding whether Tourism is an integral part of Council's strategic planning.
- Measure the level of local government spending on operating visitor information centres, events, festivals and promotion, marketing and development of Tourism.
- Measure the level of direct employment by local government in Tourism, including Tourism and Destination marketing employees and visitor information centre staff

The key to providing valid and reliable estimates of the contribution of Local government to Tourism is defining what is included or excluded from the measure. For instance investment in tourism products and community infrastructure including parks, gardens, museums, galleries, Tourist parks and airports enhances the amenity of areas for both visitors and local residents. The project team determined that Council spending on community infrastructure to be outside the scope of this study. However this is an area that could be considered for future research.

Methodology and Response



SURVEY METHODOLOGY

Every Council in Australia had an opportunity to participate

About the Survey

The survey utilised for the research was designed by DBM Consultants in consultation with Australian Regional Tourist Network, Austrade and Australian Local Government Association. The initial design was reviewed by a panel of Local Council Tourism Managers to ascertain whether the questions could be understood and answered in the context of local government. Refinements were made to the initial design and the survey was approved by the project team.

The Australian Local Government Association provided a contact list of all Councils in Australia and this was used as the survey's sample frame. An email invitation was forwarded to every Council with a link to the survey. Each invitation also included details on the relevant person in Council who should complete the survey.

The survey was largely completed online. However, a number of Councils completed paper copy versions, while telephone and face to face interviews were also undertaken by DBM researchers.

All State Local Government Associations and State/Territory Department of Local Governments and State Government Ministers responsible for Tourism were forwarded information seeking their support for the project. Various individuals within these agencies promoted the survey with Local Councils and the research project team thanks them for their assistance.

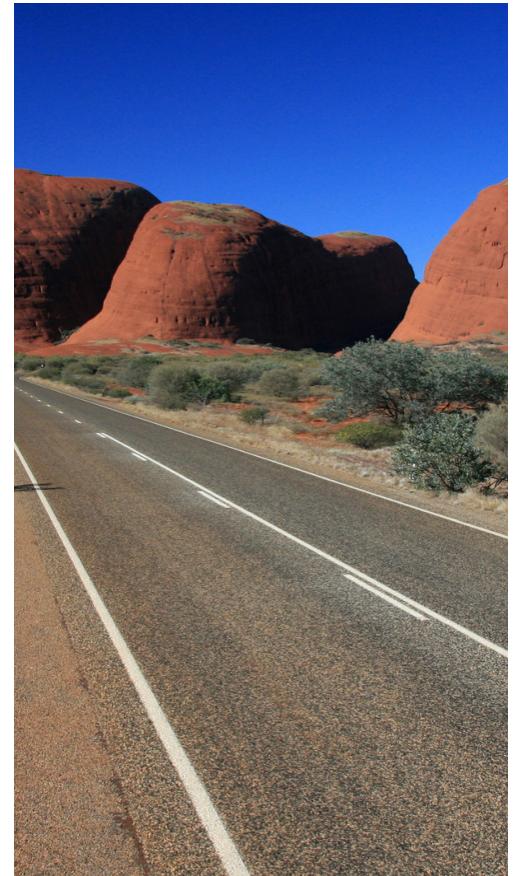
DATA COLLECTION

Local Government were extremely supportive of the survey

The survey was conducted over 3 months, from October to December 2016, to allow Councils adequate time to compile their responses recognising that, for many, a number of staff would need to be involved.

Over this period, a series of reminder emails and follow-up telephone calls were undertaken to encourage response. Hard copy versions of the survey were also supplied to a number of Councils that were having difficulty in completing the online survey. Telephone and face to face interviews were also undertaken to maximise response.

It was found that when the relevant individual within the Council was aware of the survey, the individual was extremely supportive of the project. This caused the collection period to be re-opened a number of times as the survey continued to generate enthusiasm as awareness increased across local government.



SURVEY RESPONSE

The level of response achieved exceeded expectations

The Australian Local Government Association database identified that 561 Council areas existed across all States and the Northern Territory. The Australian Capital Territory was excluded from the sample frame as the responsibilities usually handled by local government are administered by the territory government and were consequently out of the survey's scope.

Each Council was sent an invitation to participate in the survey. Overall, 256 Councils or a significant 46% had responded to the survey. The distribution of response is shown in the adjoining table.

The survey achieved a diverse coverage across all States and within metropolitan, regional and remote areas of Australia. In addition to ensure the survey would deliver robust and accurate estimates key regional Tourism and Capital City local government areas were identified and captured in the survey's response.

| | NSW | VIC | QLD | WA | SA | TAS | NT | AUST |
|-----------------------|-----|-----|-----|-----|-----|-----|-----|------|
| Responses | 70 | 44 | 38 | 51 | 35 | 13 | 5 | 256 |
| Actual Number* | 152 | 79 | 77 | 138 | 68 | 29 | 18 | 561 |
| Response rate | 46% | 56% | 49% | 37% | 51% | 45% | 28% | 46% |

*Based on information provided by ALGA

EXTRAPOLATING SURVEY RESULTS

Survey response was weighted to calculate spending and employment estimates

A critical objective of the research was to provide estimates of Local government total spending and employment across all Australian States and the Northern Territory. To achieve this a weighting process was applied using the Australian Local Government Classification (ALCG). The ALCG categorises local government bodies across Australian using population, the population density and the proportion of population that is classified as urban for the Council. The classification consists of 22 categories where each Council is identified Urban, Regional, Rural or remote of particular size.

Survey weights were calculated using the following formula:

$$\text{Category Weight} = \frac{\text{Actual No of Councils in State ALCG Category}}{\text{No of responding Councils in State ALCG category}}$$

Survey results in this report are based on the weighted survey data. A detailed explanation of the ALCG and the categories used to define Metropolitan, Regional and remotes areas is included in Appendix 1.

Key Survey Findings



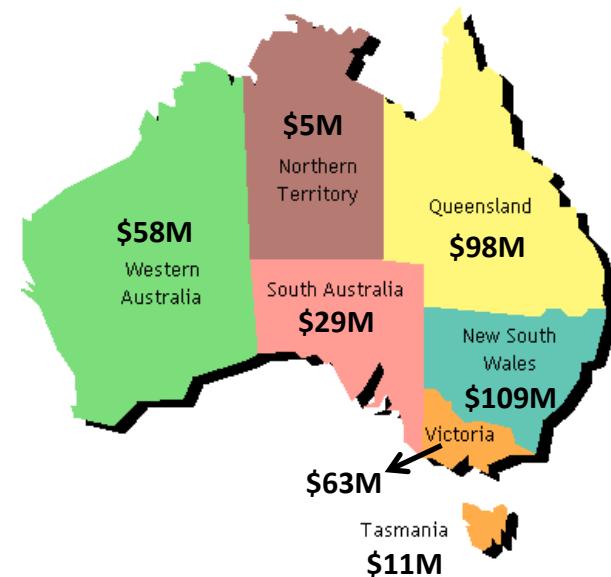
TOURISM SPENDING BY LOCAL GOVERNMENT

Tourism Spending stands at \$373M

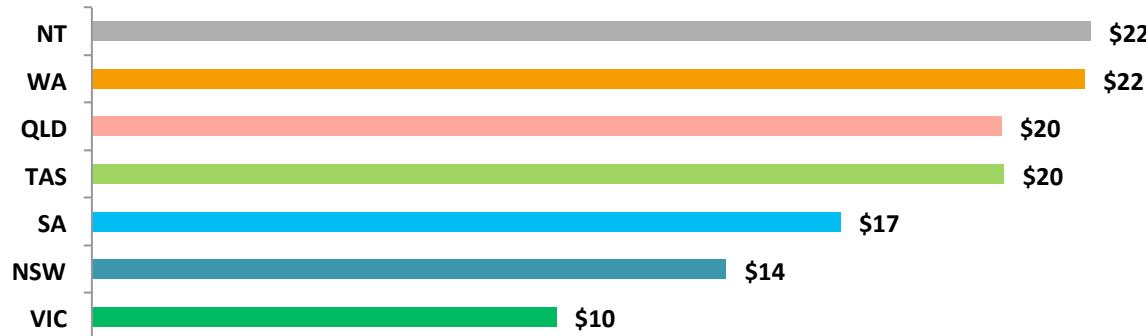
In 2015/16 local Government in Australia contributed \$373M to the operation of visitor information centres, events and festivals and the promotion, marketing and development of Tourism.

Both New South Wales (\$109M) and Queensland (\$98M) contributed significantly to the national wide spending.

On a per capita basis, Northern Territory and Western Australia Councils spent the highest per resident at \$22.



Spending Per Resident

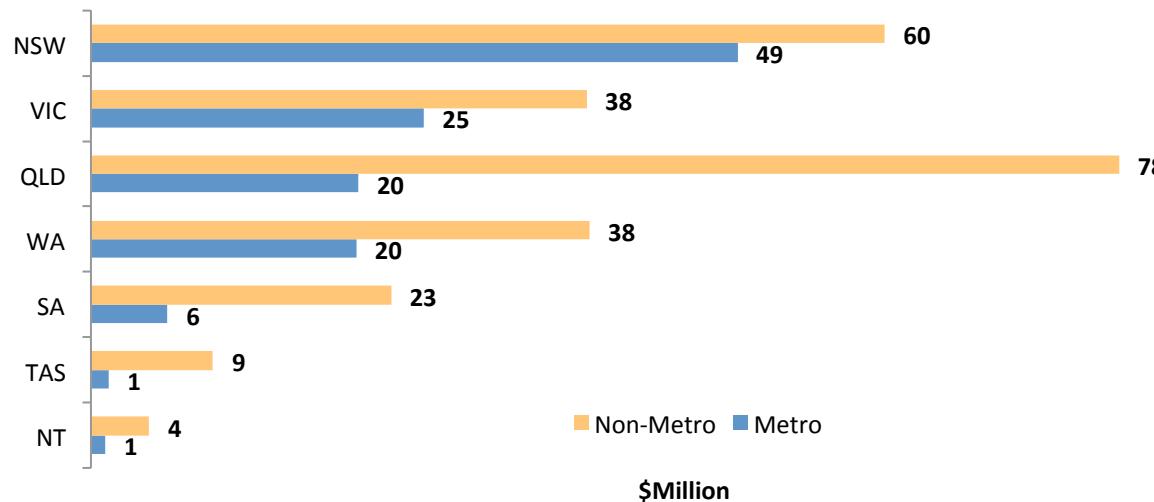
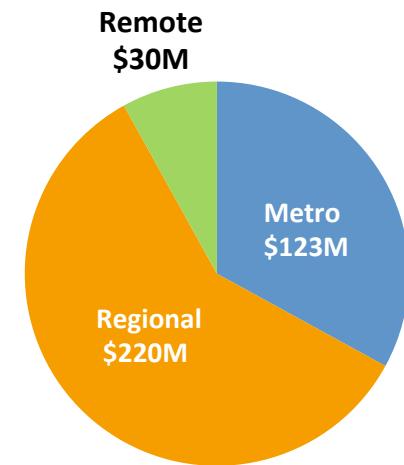


TOURISM SPENDING BY LOCATION OF COUNCIL

Two thirds of Local Government spending on Tourism was undertaken by Councils located in regional and remote areas

Councils located in regional Australia indicated that in 2015/16 they spent \$220M on operation of visitor information centres, events and festivals and the promotion, marketing and development of Tourism, with \$30M being spent by Councils located in Remote areas.

In NSW 55% (\$60M) of Tourism spending was undertaken by Councils located outside the Sydney metropolitan area, while 60% of spending in the State of Victoria was from Councils located in the regions. The proportion of regional spending was much higher in the smaller states/territories.



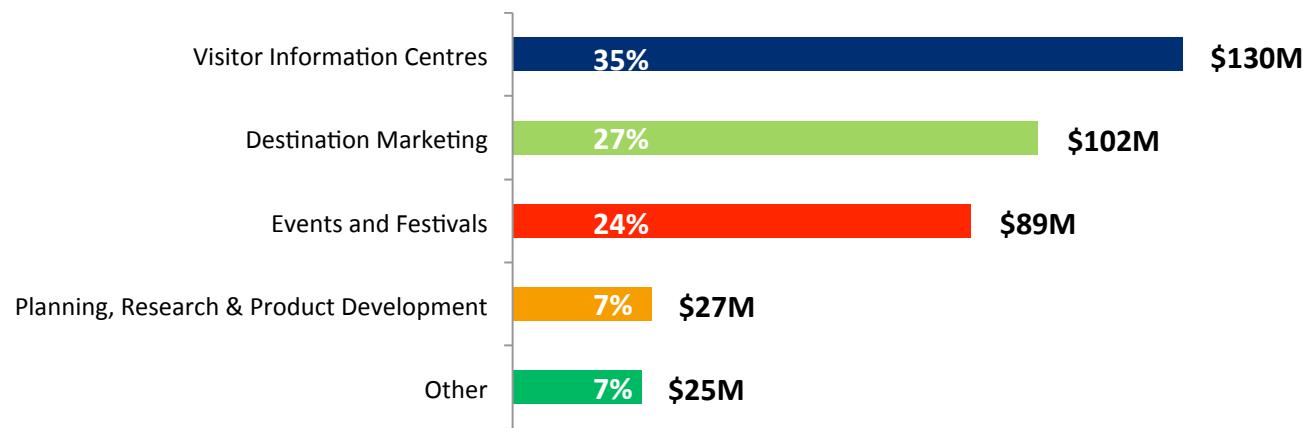
TYPE OF TOURISM SPENDING

35 cents of every dollar spent went to operating visitor information centres

Local Government in Australia spent an estimated \$130M on operating visitor information centres in 2015/16.

A further \$102M was spent on destination marketing which includes marketing and promotion staff and marketing materials such as maps, brochures, websites, advertising, social media, and signage.

In 2015/16 \$89M was spent on local events and festivals.



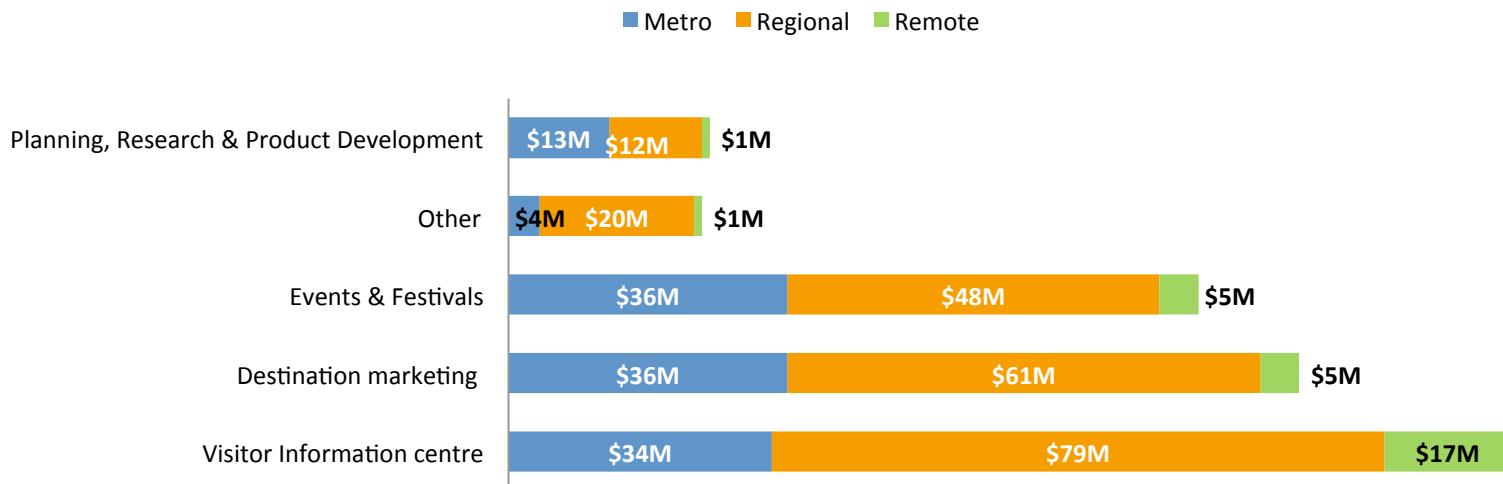
TYPE OF TOURISM SPENDING BY LOCATION

In Remote Council areas 60 cents of every dollar went on operating visitor information centres

In 2015/16 Local Government in Metropolitan areas of Australia indicated they spend similar amounts on operating visitor centres, destination marketing and events and festivals.

For regional Councils, 36% (\$79M) of spending was used to operate visitor information centres. A sizeable \$61M was spent on contributing to events and festivals.

Metropolitan based Councils were found to allocate the highest proportion compared to other areas of their total Tourism spend on destination management plans, tourism product development and research.

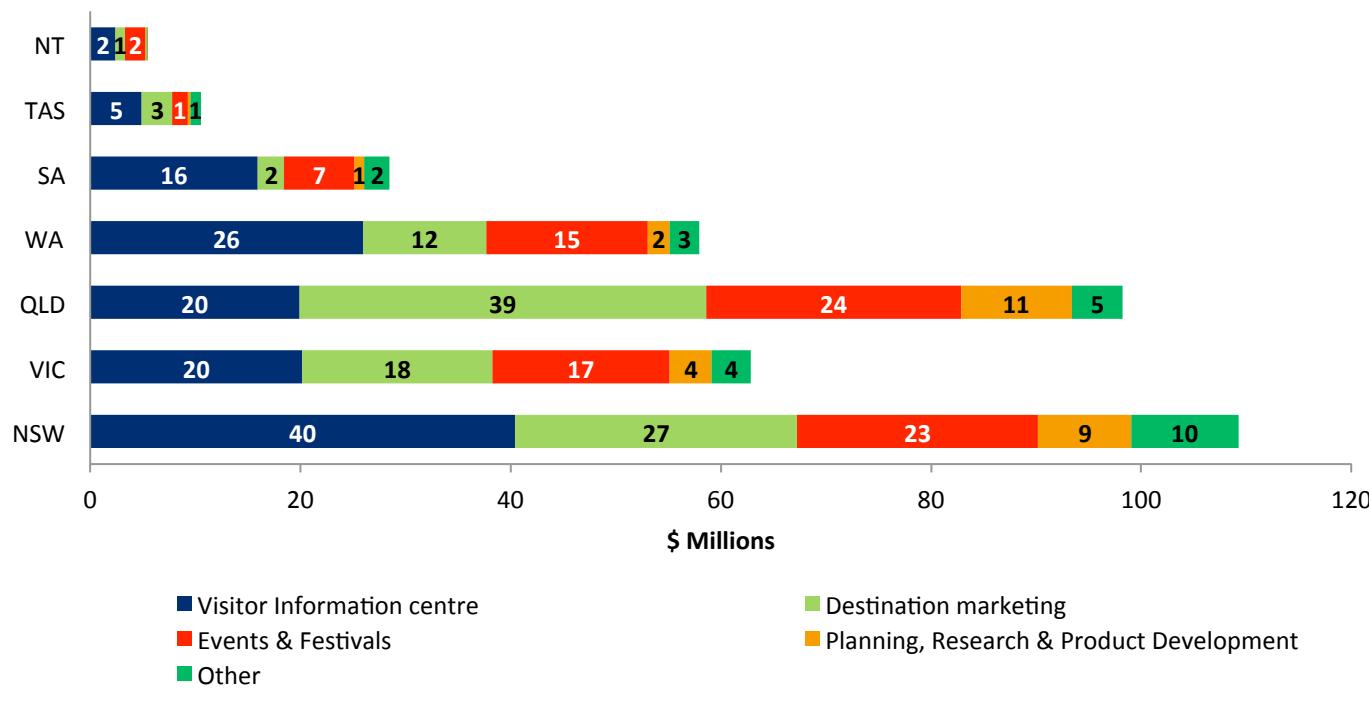


TYPE OF TOURISM SPENDING BY STATE

In Queensland 39 cents of every dollar spent went on destination marketing

In 2015/16 Local Government in South Australia (55%) allocated the highest proportion of their total Tourism spent on operating visitor information centres, with Queensland (20%) allocating the lowest.

With high proportion allocated to Visitor Centres, South Australia spent the lowest of all States on Destination marketing (7%). NT local Councils allocated the highest proportion of available tourism spend to Events and Festivals, compared to other States/territories.

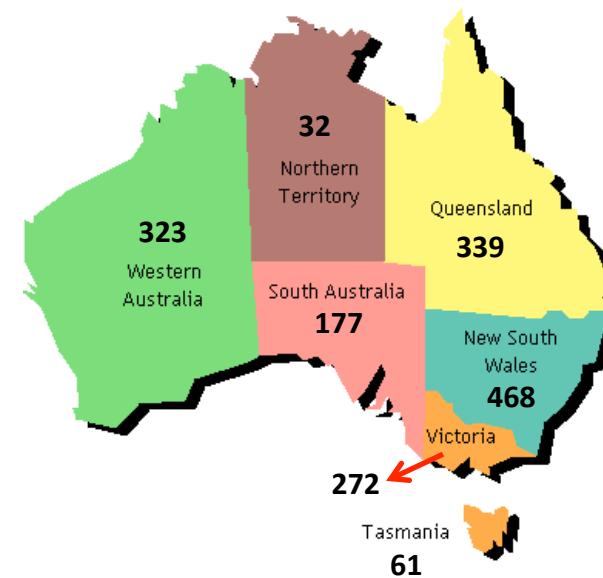
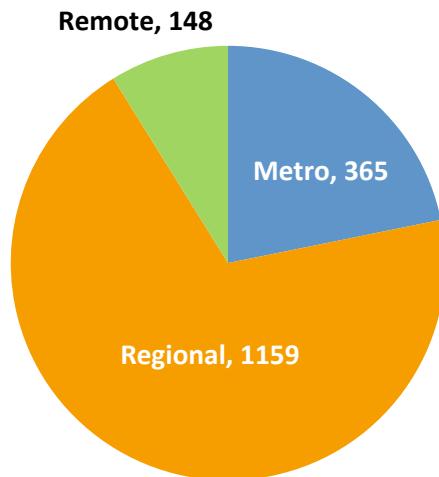


TOURISM EMPLOYMENT BY LOCAL GOVERNMENT

Eight in ten Councils in Australia directly employ staff that have a Tourism role

In 2015/16 Local Government in Australia directly employed an estimated total of 1,672 full-time equivalents that had a tourism role. New South Wales Council and Queensland accounted for almost 50% of the total Australian employment. Employment numbers were also high in Western Australia which is reflective of the large number of Councils that exist in that state.

Of the total employed, 3 out of every 4 employees were employed by regional and remote Councils.



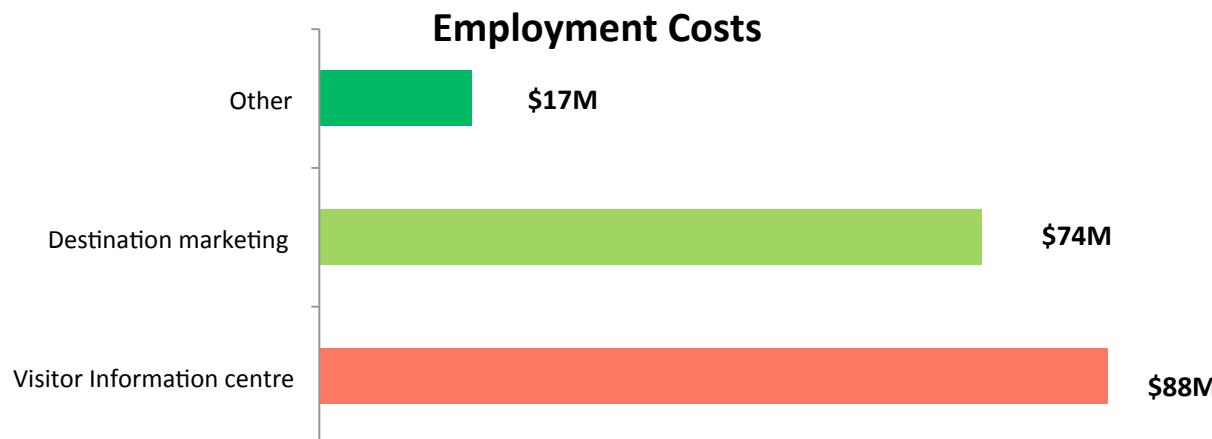
TOURISM SPENDING ON EMPLOYMENT

48% of Local Government Tourist spending went on employment cost

In 2015/16 the employment costs for individuals employed by Councils in Tourism roles was estimated at \$179M.

68% of the operating expenses for Visitor Information centres was employment related. The employment expenses related to Destination marketing was marginally higher at 73%.

Both Metropolitan (47%) and regional (50%) based councils' employment costs were a similar proportion of their total Tourism spend. However, Remote Councils' employment costs were lower at 38% of their total Tourism spend.

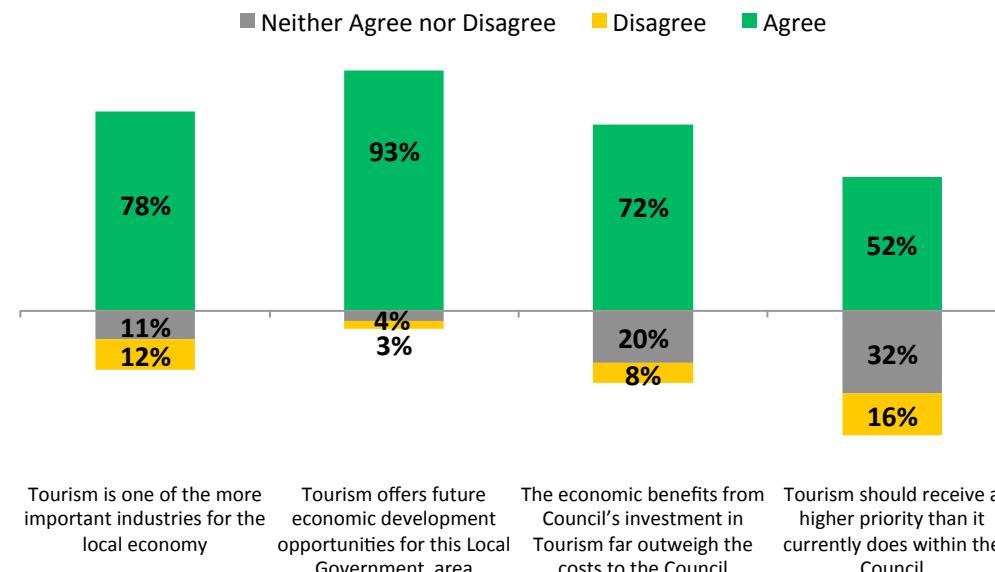


LOCAL GOVERNMENT PERCEPTIONS OF TOURISM

Perception is strongest around the Tourism industry offering future economic development opportunities

Nine in ten Councils agreed that Tourism offers future economic development opportunities for their local area. Tourism was also rated as one of the more important industries of the local economy by 78% of Councils, while 72% of councils believed the economic benefits of Council's investment in Tourism far outweigh the costs. .

Perception was found to be weakest on the statement "tourism should receive a higher priority within the council", with a lower 52% agreeing to the statement.

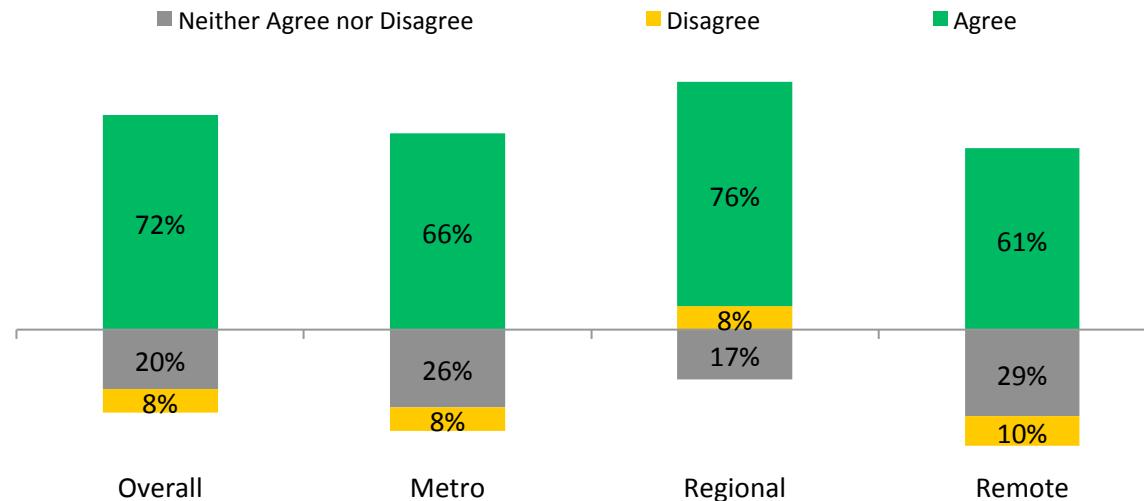


LOCATION PERCEPTIONS OF TOURISM

Perception is strongest for Regional Councils towards the benefits/costs of Tourism

Councils located in regional Australia reported the most positive view to the statement that the economic benefits of investment in Tourism far outweigh the costs, compared to metropolitan and rural Councils.

Economic benefits from Council's investment in Tourism far outweigh the costs to the Council

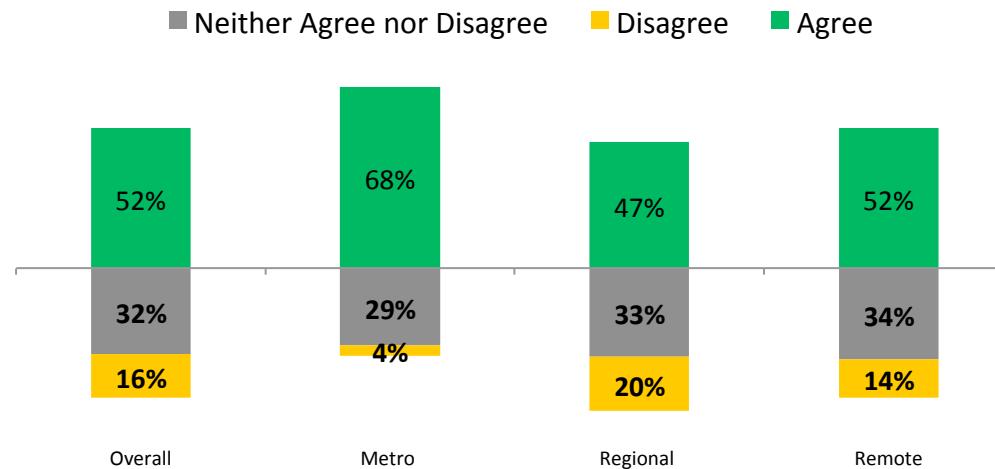


LOCATION PERCEPTIONS OF TOURISM

Metropolitan Councils strongest on Tourism receiving a higher priority.

Metropolitan Councils had the strongest view that Tourism should receive a higher priority than it currently does within Council, compared to its regional or remote counterparts.

Tourism should receive a higher priority than it currently does within the Council



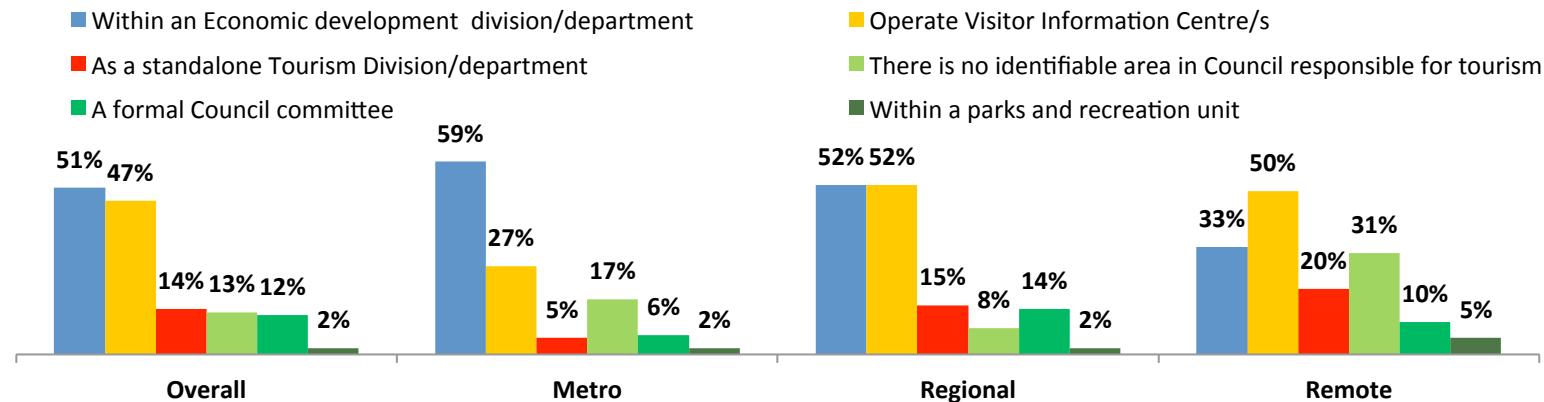
TOURISM'S FIT IN LOCAL GOVERNMENT STRUCTURE

Tourism either sits within an economic development division or as a stand alone Tourism division

47% of Councils indicated they operated a visitor information centre, with the lowest incidence reported by metropolitan Councils at 27%.

In terms of organisation structure, 51% of Councils indicated Tourism fit within an economic development division or department. This structure was more common amongst metropolitan Councils.

One in ten Councils indicated that there was no identifiable area in Council responsible for Tourism. This increased to 3 in 10 for Councils in remote areas.



LOCAL GOVERNMENT TOURISM PLANNING

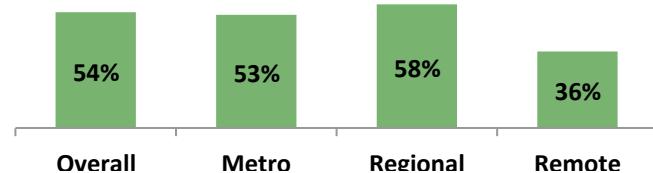
Councils support the strategic value of tourism

The importance of tourism to a Council can be partly gleaned by whether the sector is noted in any written Council plans and policy.

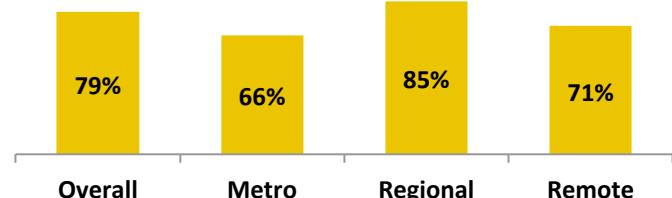
The inclusion of Tourism in long-term corporate plans supports the high strategic value local government place on Tourism. Around 8 in 10 Councils indicated that Tourism actions and outcomes are identified in Councils' current long-term strategic planning.

The importance of tourism to regional Australia is noted with 6 out 10 regional Councils having prepared a standalone Tourism plan or strategy.

COUNCILS WITH STANDALONE TOURISM PLAN, POLICY OR STRATEGY



TOURISM ACTIONS AND OUTCOMES ARE IDENTIFIED IN COUNCIL'S CURRENT LONG TERM CORPORATE STRATEGIC PLAN



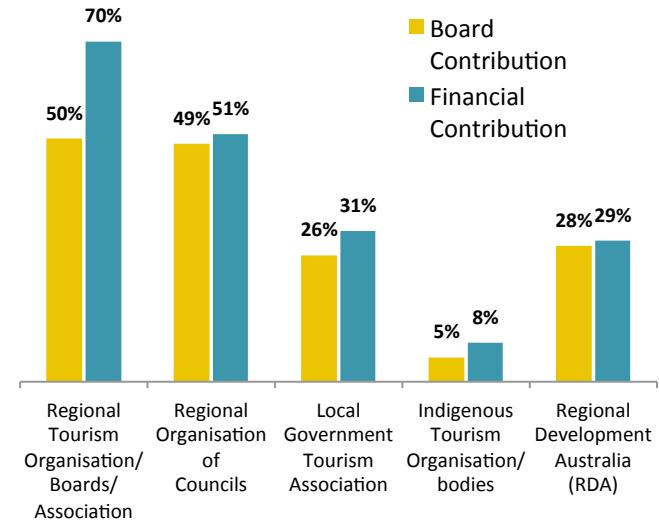
SUPPORT FOR EXTERNAL ORGANISATIONS

Strong commitment shown by Council to external organisations

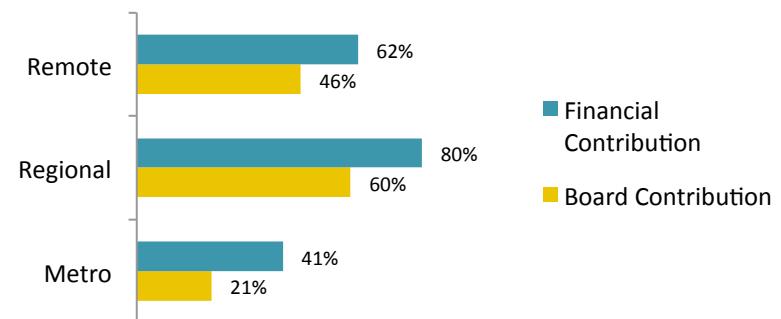
The contribution (financial or otherwise) of Councils to various tourism and economic development organisations indicates the commitment of Local Government's support for tourism, beyond the strategic level.

Seven out of ten Councils stated they contribute financially to Regional Tourism Organisations (RTO), with one in two councils providing a delegate for the RTO board.

Some variation in support for RTOs was identified across location with Councils in regional areas having a higher commitment.



CONTRIBUTION TO REGIONAL TOURISM ORGANISATION

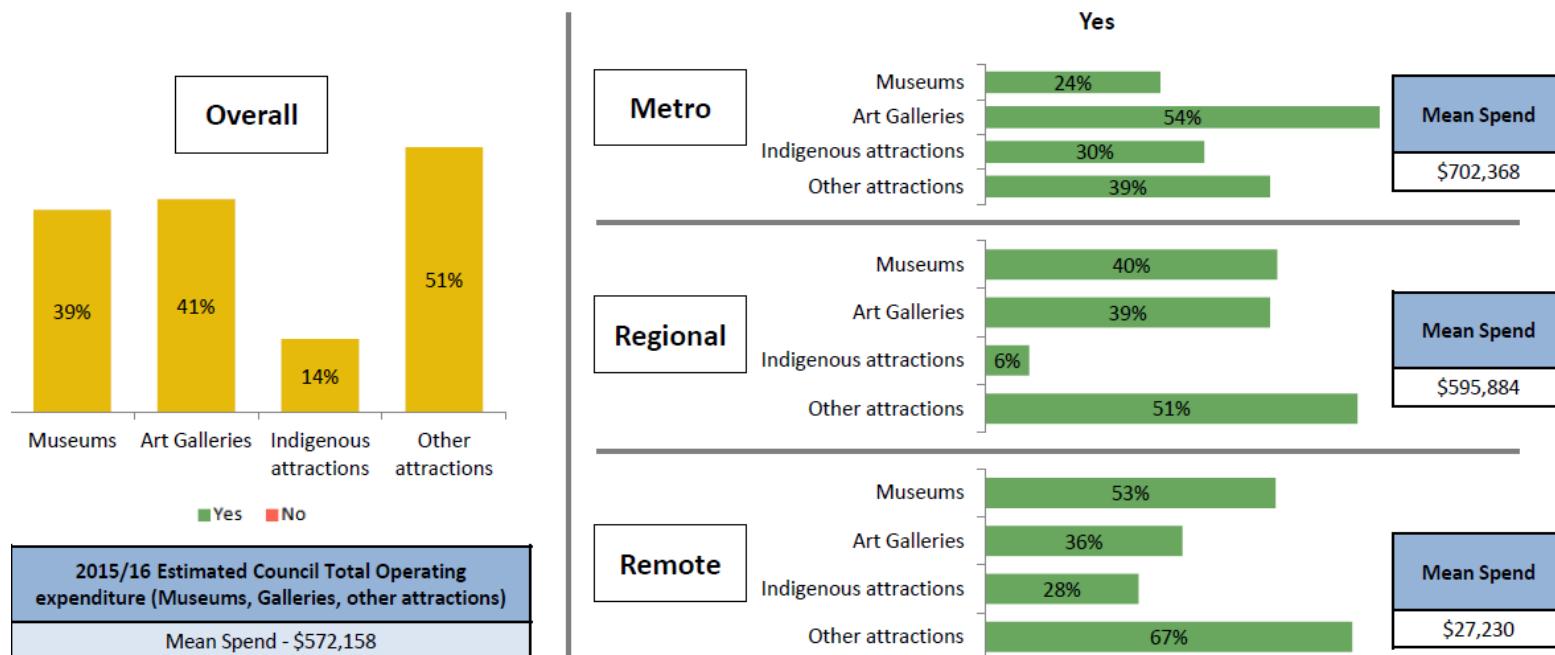


SUPPORT BY LOCAL GOVERNMENT FOR TOURIST ATTRACTIONS

Local Councils have a significant role in providing products for Visitors

Apart from direct spending on promotion, marketing and development of Tourism, a large number of Councils operate museums, art galleries and other attraction such as interpretative centres, light houses, and natural features to provide an experience for visitors to their area.

On average Councils located in Metropolitan areas tend to spend the most on these facilities.



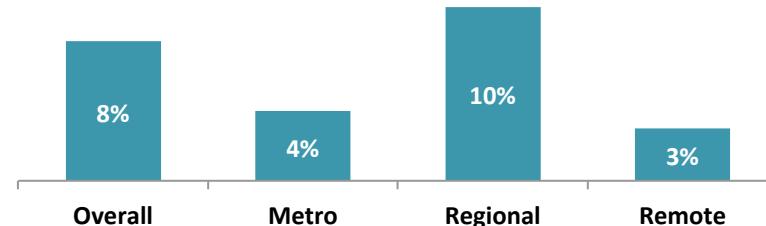
LOCAL GOVERNMENT FUNDING FOR TOURISM

As yet, no traction for introduction of business levy to fund Tourism

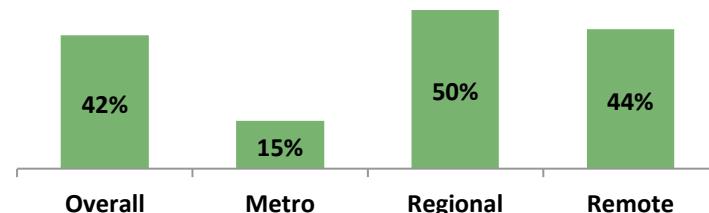
Only one in ten Councils indicated they had a business levy of which funds were used for Tourism-related initiatives. This indicates that for the majority of Councils across Australia Tourism spending is largely financed by residential and business rates. This is not with outstanding income received through grants and surplus from the operation of tourism commercial entities such as attractions, visitor centres and tourism parks.

The operation of Tourism parks as commercial entities is a common role for local government. One in two regional Councils stated they operate Tourism Parks for accommodating visitors' purposes.

BUSINESS LEVY – FUNDS USED FOR TOURISM-RELATED INITIATIVES



COUNCILS OPERATING TOURISM PARKS FOR ACCOMMODATION PURPOSES



LOCAL GOVERNMENT GRANTS FOR TOURISM

Grants are small part of Local Government spending on Tourism

Only one in three Councils indicated they received a government grant or financial assistance for tourism related initiatives in 2015/16.

70 cents of every dollar provided in grants was sourced from State Governments.

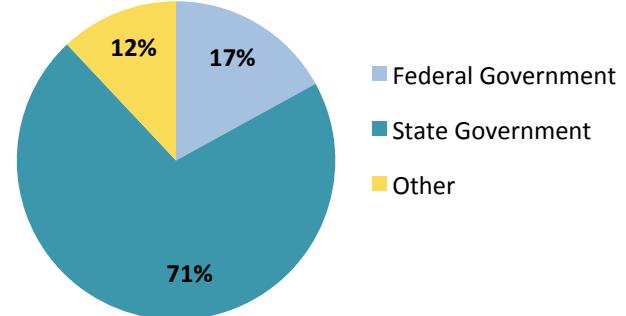
Some examples of the purposes of grants include, aboriginal & environmental interpretive centres, cultural hubs, town centre revitalisations, scenic walks, signage, walking trails, festivals and regional airport up-grade.

A full list of grant projects provided by participating Councils are included in the appendices.

RECEIVED GOVERNMENT GRANTS FOR TOURISM 2015/16



FUNDING SOURCE



APPENDIX 1

Participating Councils were allocated to a ACLG category for weighting

An objective of the research was to provide estimates of Local government total spending and employment across all Australian States and the Northern Territory. To achieve this a weighting process was applied using the Australian Classification Local Government (ACLG) - (refer to adjoining table).

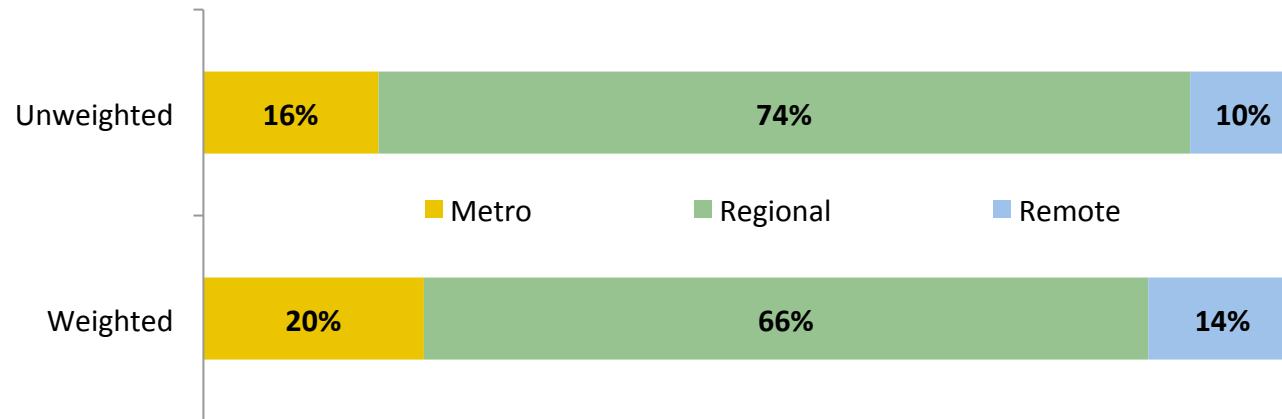
For reporting purposes the ACLG categories were combined into three distinct areas. These were:

1. Metropolitan defined as Capital Cities (CC), Metropolitan Developed (D) and Medium to Very Large Fringe. (UFM, UFL, UFV)
2. Regional defined as Regional Towns/ city (R), Agriculture (A) and Small Fringe (UFS)
3. Remote defined as Remote.

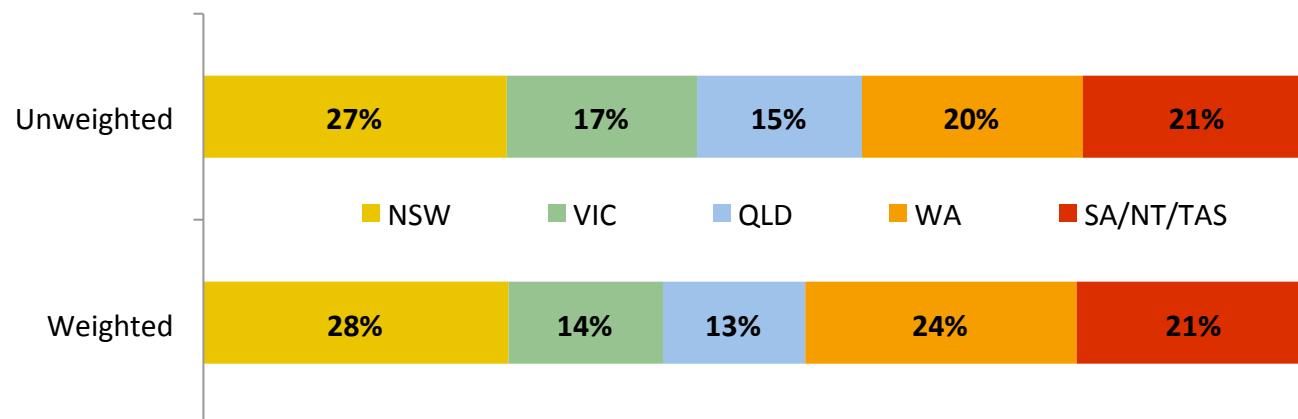
| Step 1 | Step 2 | Step 3 | Identifiers | Category |
|---|--|--|--|---|
| URBAN (U) | | | | |
| Population more than 20 000 OR If population less than 20 000, EITHER Population density more than 30 persons per square kilometre OR 90 per cent or more of the local governing body population is urban | CAPITAL CITY (CC) METROPOLITAN DEVELOPED (D) Part of an urban centre of more than 1 000 000 or population density more than 600 per square kilometre REGIONAL TOWNS/CITY (R) Part of an urban centre with population less than 1 000 000 and predominantly urban in nature FRINGE (F) A developing LGA on the margin of a developed or regional urban centre | Not applicable SMALL MEDIUM LARGE (L) VERY LARGE (V) SMALL MEDIUM LARGE (L) VERY LARGE (V) SMALL MEDIUM LARGE (L) VERY LARGE (V) | up to 30 000 30 001-70 000 70 001-120 000 more than 120 000 up to 30 000 30 001-70 000 70 001-120 000 more than 120 000 up to 30 000 30 001-70 000 70 001-120 000 more than 120 000 | UCC UDS UDM UDL UDV URS URM URL URV UFS UFM UFL UFV |
| RURAL (R) | | | | |
| A local governing body with population less than 20,000 AND Population density less than 30 persons per square kilometre AND Less than 90 per cent of local governing body population is urban | SIGNIFICANT GROWTH (SG) Average annual population growth more than three per cent, population more than 5000 and not remote AGRICULTURAL (A) | Not applicable SMALL MEDIUM LARGE (L) VERY LARGE (V) | | RSG |
| | REMOTE | EXTRA SMALL (X) SMALL MEDIUM LARGE (L) | up to 400 401-1000 1001-3000 3001-20 000 | RTX RTS RTM RTL |

PROFILE OF COUNCIL SURVEY PARTICIPANTS

BY AREA



BY STATE



APPENDIX 2

Where does Tourism fit into the organisational structure of your Council? Other responses

| Council Owned Enterprise | Sits within Community Development department | Natural Areas | Within a communication area | Business Development | Financially support local RTO | Within City Strategy Department |
|---|---|---|--|--|--|--|
| within Community Development | Marketing Department | Contractor | Community and Cultural Development Unit | Services provided by independent organisation | GM Office/ Cultural Services. formal unit being established | Tourism, economic Development, Events Arts and Culture |
| Funding provided to external tourism body | Manage and facilitate local events | Community Engagement | Development & Economic Development | Communications, Events and Tourism | Development Services Department | Part of corporate and community services |
| Within the Corporate Services Directorate | Regional Development office | Also Marketing and Communications | within Community Service | Fall under Strategic Planning & Environmental Services Department | One officer | Tumut shares Tourist Information Centre with NPAWS |
| Organisation and Community Development Services | Placemaking | Also on a number of external committees | Arts & Events department | CEO | CEO | Under Director of Corporate Services |
| With in the Community Development Department | Managed by Deputy Manager | Under the GM | As part of Community Services | Contracted body | Community Services | Communications and Tourism team |
| Organisational Development | New regional board to be formed | Place Management team | Cultural Service Unit | Marketing & PR dept. | Within the Community Services sector of council | Marketing |
| Community Services | Tourism / Economic Development Officer works with formal Committee | BTRC is a new Council and tourism is being prioritised in planning. | Sits external to Council. Council provide funds to external operator | A community and Council based committee predominately for cruise ships | Close working relationships with regional tourism organisation, SATC, SATIC | Plus a Destination Marketing Organisation which Councils financially supports |
| As part of Administration & Community Services, with direct input by the Manager | Fund a Tourism association through MOU to provide visitor services and promotion. | within council corporate planning along with the one economic development officer | Destination Development Manager works on a DMP additionally but separate from the VIC team | Operate Visitor Information Outlet. There is vision for tourism to become a bigger part of Council. | Tourism is a separate Incorporated business highly funded by council but not owned by council. | Within Eco Dev, and we also outsource marketing to a local marketing board, and some industry Dev to a local business board. |
| Within Community Wellbeing department which also includes economic development and tourism; and a management agreement with a community organisation for facilities, VIC and museum | | | | We outsource our Tourism and Economic Development activity to our Regional Tourism Organisation, which also manages our Visitor Information Centre | | |

APPENDIX 2

Can you please indicate what the grant(s) were allocated for, funding source and their approximate value?

| Funding Source | Initiative | Value | Funding Source | Initiative | Value | Funding Source | Initiative | Value |
|--------------------|--|---------------|--------------------|-------------------------------------|------------|------------------|-----------------------------------|------------|
| Federal Government | Aboriginal & Environmental Interpretive Centre | \$ 2,100,000 | Federal Government | Ceduna Oysterfest | \$ 19,100 | Other | Multi-cultural event | \$ 14,000 |
| Federal Government | AE2 Replica | \$ 32,450 | Federal Government | Arts | \$ 25,000 | Other | Cycle network | \$ 95,000 |
| Federal Government | VC upgrades | \$ 975,000 | Federal Government | Tourism | \$ 5,000 | Other | Mural | \$ 10,000 |
| Federal Government | Construction of new VIC/ Museum | \$ 7,000,000 | Federal Government | Interpretative signage/ storyboards | \$ 69,000 | State Government | Operation | \$ 285,000 |
| Federal Government | Yepoon Foreshore & Town Centre Revitalisation | \$ 10,000,000 | Federal Government | Cosmos Centre upgrade | \$ 500,000 | State Government | Signage | \$ 50,000 |
| Federal Government | Port of Sale Cultural Hub including Art Gallery, VIC and Library | \$ 14,530,000 | Other | Signage | \$ 7,000 | State Government | Multicultural NSW | \$ 18,000 |
| Federal Government | Sapphire Gemfields Interpretive Trail | \$ 500,000 | Other | Art Gallery upgrade | \$ 6,000 | State Government | Destination NSW | \$ 10,000 |
| Federal Government | Lavington Sports Ground Redevelopment | \$ 4,025,000 | Other | Greens Gunyah Museum | \$ 15,000 | State Government | Family Balloon Fiesta | \$ 1,000 |
| Federal Government | Marine Berthing Platform | \$ 600,000 | Other | Legend of the Faerie Tree | \$ 12,500 | State Government | Sum of Us Museum Exhibition | \$ 4,998 |
| Federal Government | Visitor Interpretive Centre | \$ 20,000 | Other | Summer Events | \$ 10,000 | State Government | Community Museums Strategic Plans | \$ 7,500 |
| Federal Government | Blackall Woolscour | \$ 800,000 | Other | MAMA Exhibition | \$ 119,300 | State Government | Diversity AR Museums Project | \$ 32,820 |
| Federal Government | Rec Centre Kitchen | \$ 25,000 | Other | Interpretation Plan and Signage | \$ 21,075 | State Government | Masters Games | \$ 10,000 |
| Federal Government | Walk the Yorke Leisure Trail | \$ 399,545 | Other | Tourism Funding | \$ 500,000 | State Government | VC upgrades | \$ 165,000 |
| Federal Government | IVAIS | \$ 100,000 | Other | Callide Dam Shelter | \$ 45,000 | State Government | Regional Visitor Economy Fund | \$ 120,000 |
| Federal Government | National Stronger Regions Fund - Southern Scenic Escarpment | \$ 3,500,000 | Other | Dirk Hartog 400yr Celebrations | \$ 150,000 | State Government | Event Investment | \$ 150,000 |
| Federal Government | Interpretive signage | \$ 15,000 | Other | Dirk Hartog | \$ 25,000 | State Government | Art Gallery Grant | \$ 90 |
| Federal Government | Pontoon | \$ 160,000 | Other | Shire Event Suite | \$ 16,500 | State Government | Sarina Field of Dreams | \$ 250,000 |
| Federal Government | Telecoms | \$ 2,000,000 | Other | Lottery West | \$ 9,800 | State Government | State Funding to RTB | \$ 275,000 |
| Federal Government | Silo Art Trail | \$ 200,000 | Other | xxx | \$ 1 | State Government | It's On marketing campaign | \$ 50,000 |



APPENDIX 2

| Funding Source | Initiative | Value | Funding Source | Initiative | Value | Funding Source | Initiative | Value |
|------------------|--|---------------|------------------|--|------------|------------------|---|---------------|
| State Government | Blast Furnace Park upgrade | \$ 1,000,000 | State Government | hanging rock | \$ 250,000 | State Government | Riverboat Dock Development | \$ 3,900,000 |
| State Government | Event | \$ 10,000 | State Government | strategic partnership | \$ 400,000 | State Government | Historic Log Slip | \$ 60,000 |
| State Government | Royalties for Regions | \$ 375,000 | State Government | Pyrenees Unearthed Festival | \$ 15,000 | State Government | Webjet Campaign | \$ 160,000 |
| State Government | Industry Development | \$ 10,000 | State Government | MAMA Exhibition | \$ 20,000 | State Government | Busselton Margaret River Regional Airport | \$ 55,900,000 |
| State Government | TDDI workshops | \$ 9,000 | State Government | Write Around the Murray | \$ 20,000 | State Government | Greenfields Hotel Sites Servicing Busselton foreshore | \$ 4,500,000 |
| State Government | Improvements to Galore Hill | \$ 60,000 | State Government | Business and Tourism Awards | \$ 11,000 | State Government | NSW Clubs Grant Category 3 | \$ 300,000 |
| State Government | Yeppoon Foreshore & Town Centre Revitalisation | \$ 29,000,000 | State Government | Business Networking Events | \$ 3,000 | State Government | Tourism Precinct Enabling Infrastructure | \$ 300,000 |
| State Government | Emu Park ANZAC Memorial Boardwalk | \$ 200,000 | State Government | Business Workshops | \$ 2,000 | State Government | Surf Coast Arts Trail | \$ 3,000 |
| State Government | Flagship Funding | \$ 10,000 | State Government | Tourism Events Support | \$ 47,000 | State Government | Winchelsea Beautification | \$ 175,000 |
| State Government | Regional tourism development | \$ 150,000 | State Government | Foundation for Rural and Regional Renewal | \$ 12,500 | State Government | Rural Hinterland Strategy | \$ 50,000 |
| State Government | Destination management plan | \$ 95,000 | State Government | NT Arts | \$ 40,000 | State Government | Blackall Airport Terminal | \$ 500,000 |
| State Government | Recreational Fishing Grant Program | \$ 20,000 | State Government | Youth grants | \$ 4,000 | State Government | Tambo Walking Trail | \$ 300,000 |
| State Government | SA Recreational Fishing Grants | \$ 800 | State Government | The Art of waste | \$ 7,200 | State Government | Flagstaff Hill Development | \$ 1,950,000 |
| State Government | Contribution to running Visitor Info Centre | \$ 23,500 | State Government | Coastal Camping Node | \$ 191,250 | State Government | Funn4Kids event Promotion | \$ 30,000 |
| State Government | Phillip Island and San Remo Visitor Economy Strategy | \$ 150,000 | State Government | Rehabilitation Coastal Camping Node | \$ 10,000 | State Government | Bullawah Cultural Trail | \$ 25,000 |
| State Government | Sunset Coast Trail Signage | \$ 25,300 | State Government | Visitor Centre funding | \$ 25,966 | State Government | Sam Miranda tour of the King Valley | \$ 10,000 |
| State Government | Summer Events Cultural Program | \$ 45,000 | State Government | Tourism WA - Sustainable Visitor Centre | \$ 12,000 | State Government | John O'Brien Festival Event | \$ 2,910 |
| State Government | Joondalup Festival | \$ 45,000 | State Government | Sustainability Grant DHVIC | \$ 12,000 | State Government | Redevelopment Building to Arts Centre | \$ 240,000 |
| State Government | Morwell Mine Fire Tourism Recovery | \$ 200,000 | State Government | Regional Visitor Centre Sustainability grant - capital items | \$ 17,500 | State Government | DNSW RVEF funding | \$ 140,000 |

APPENDIX 2

| Funding Source | Initiative | Value | Funding Source | Initiative | Value | Funding Source | Initiative | Value |
|------------------|--|------------|------------------|--|--------------|------------------|--|------------|
| State Government | RVEF | \$ 130,000 | State Government | Pontoon | \$ 180,000 | State Government | Signage bays | \$ 750,000 |
| State Government | Civic Centre | \$ 220,000 | State Government | Telecoms | \$ 1,900,000 | State Government | Regional Brand Development | \$ 40,000 |
| State Government | Callide Dam Rec | \$ 150,000 | State Government | Silo Art Trail | \$ 200,000 | State Government | Destination Marketing plan | \$ 15,000 |
| State Government | Farmers Market | \$ 30,000 | State Government | Installation of cabins at caravan park | \$ 320,000 | State Government | Halfway there Shindig | \$ 16,000 |
| State Government | Visitor Information Centre Volunteer training | \$ 10,000 | State Government | Ceduna Oysterfest | \$ 10,000 | State Government | Smiley festival | \$ 18,000 |
| State Government | Indigenous Art | \$ 15,000 | State Government | Wayfinding signage | \$ 150,000 | State Government | Concerts | \$ 30,000 |
| State Government | Dirk Hartog | \$ 100,000 | State Government | RIEF | \$ 15,000 | State Government | Engage a consultant to develop order of magnitude costing for a possible relocation of the Visitor Centre to the railway station | \$ 6,250 |
| State Government | Wheat belt Development Commission | \$ 4,500 | State Government | RADF | \$ 50,000 | State Government | Warren Blackwood Alliance of Councils (the Shires of Bridgetown-Greenbushes, Manjimup & Nannup) received a grant under the Regional Visitor Centre Sustainability Grant program to develop a visitor servicing business plan that would be implemented across the 3 Shires | \$ 33,830 |
| State Government | New exhibit at Whale Centre | \$ 15,000 | State Government | Other | \$ 20,000 | | | |
| State Government | Maryborough story trail | \$ 133,000 | State Government | Whale trail foreshore | \$ 25,000 | | | |

APPENDIX 3

The Questionnaire

The Australian Regional Tourism Network, in partnership with Austrade is undertaking this survey to gain a better understanding of Local Government's involvement and contribution to Tourism.

The survey is supported by the Australian Local Government Association.

Your Tourism/Economic Development Manager should complete the survey.

This is a market research survey and all information collected will be used for research purposes only.

DBM Consultants is bound by Commonwealth Privacy legislation and our own industry code of Professional behaviour ensures the responses you provide remain confidential and will not be used in any way that will identify you or your organisation, unless you provide explicit approval for us to do so.

Q1. Please indicate your Local Government Area _____

Q2. We are interested in how your Council perceives tourism. Please indicate to what extent your Council would agree with the following statements.

| | RANDOMISE | Strongly Disagree | Disagree | Neither Agree nor Disagree | Agree | Strongly Agree | [DNR] Don't know |
|---|---|-------------------|----------|----------------------------|-------|----------------|------------------|
| 1 | Tourism is one of the more important industries for the local economy | 1 | 2 | 3 | 4 | 5 | 99 |
| 2 | Tourism offers future economic development opportunities for this Local Government area | 1 | 2 | 3 | 4 | 5 | 99 |
| 3 | The economic benefits from Council's investment in Tourism far outweigh the costs to the Council. | 1 | 2 | 3 | 4 | 5 | 99 |
| 4 | Tourism should receive a higher priority than it currently does within the Council | 1 | 2 | 3 | 4 | 5 | 99 |

Q3 Where does Tourism fit into the organisational structure of your Council?

Q4. Does your Council have a standalone tourism plan, policy or strategy? Are actions and outcomes for Tourism identified in Council's current long-term Corporate Strategic Plan?

Q5. Are actions and outcomes for Tourism identified in Council's current long-term Corporate Strategic Plan?

Q6. Which of the following does your Council contribute to in a Tourism capacity? (Please tick all that apply)

| | Board Contribution | Financial Contribution |
|--|--------------------|------------------------|
| Regional Tourism Organisation/Boards/Association | Yes – 1 No – 2 | Yes – 1 No – 2 |
| Regional Organisation of Councils | Yes – 1 No – 2 | Yes – 1 No – 2 |
| Local Government Tourism Association | Yes – 1 No – 2 | Yes – 1 No – 2 |
| Indigenous Tourism Organisation/bodies | Yes – 1 No – 2 | Yes – 1 No – 2 |
| Regional Development Australia (RDA) | Yes – 1 No – 2 | Yes – 1 No – 2 |



Q7 How many Full time Equivalents (FTEs) does your council employ that have a tourism role?

Q8. Does your Council have a business levy, where the funds collected are used for Tourism related initiatives?

Q9. Please identify as accurately as possible Council's expenditure in relation to Tourism for 2015/16. EXPENDITURES RELATE TO ACTUAL DOLLARS AND NOT IN KIND CONTRIBUTIONS.

| Expenditure Type | Council Funds |
|---|---------------|
| Visitor Information Centres (VIC) | |
| Visitor Information Centre staff costs (wages, salaries, superannuation) | \$ |
| All other VIC administration expenses (e.g. admin, buildings, utilities, telecommunication, sundries) | \$ |
| Destination Marketing & Development | |
| Marketing and promotion staff costs (wages, salaries, superannuation) which are not included in A. | \$ |
| Marketing costs including (e.g. maps, brochures, advertising, websites, social media, signage, PR services) | \$ |
| Contributions to events and festivals | \$ |
| Destination Management Plans and/or Strategic Plans | \$ |
| Tourism Product development & Research | \$ |
| Other Items | |
| Other Tourism related Staff costs (wages, salaries, superannuation) which are not included in A or C | \$ |
| Other non-capital expenses (specify) | \$ |

Q10. Does your Council operate any of the following?

| | | |
|--|--------|-------|
| a. Museums | 1. Yes | 2. No |
| b. Art Galleries | 1. Yes | 2. No |
| c. Indigenous attractions | 1. Yes | 2. No |
| d. Other attractions (eg interpretative centres, light house, natural features | 1. Yes | 2. No |

Q11 For 2015/16 please estimate Council's total operating expenditure for museums, galleries and other types of attractions? (PLEASE ROUND TO NEAREST DOLLAR)

Q12. Did your Council in the financial year 2015/16 receive any government grants or financial assistance for tourism related initiatives?
 Q13. Can you please indicate what the grant(s) were allocated for, funding source and their approximate value? (PLEASE ROUND TO NEAREST DOLLAR)

Q14 Does your Council operate Tourism Parks for accommodation purposes? (E.g. Caravan, cabin and camping accommodation)



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