

Final Annual Progress Report

Australia's South West Sustainable Tourism Observatory:

Tourism for Regional Development in a Sensitive Environment

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Department of Biodiversity,
Conservation and Attractions



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ABOUT THE CURTIN TOURISM RESEARCH CLUSTER (TRC)

The Tourism Research Cluster (TRC) increases Curtin's tourism research capability by providing a framework for the skills, expertise and resources of researchers to be shared, increasing opportunities for collaboration and building on the strengths of Curtin's well-established multidisciplinary approach to tourism research.

Since its inauguration in 2010, the Tourism Research Cluster (TRC) has been the fundamental player in Curtin's world-class rated research in the area. The TRC is a vibrant cross-faculty research group of internationally-recognised academics. It connects industry, government and academia and also offers a gateway for students to develop research skills. Through its diverse network of tourism academics from backgrounds such as marketing, geography, management, cultural anthropology, public policy, economics, spatial sciences, and statistics, the TRC targets topical tourism issues with wide-ranging expertise. It offers its members the chance to meet and network with tourism experts worldwide, share ideas and explore collaborative opportunities.

TABLE OF CONTENTS

TABLE OF CONTENTS.....	i
LIST OF TABLES	ii
LIST OF FIGURES	ii
LIST OF ABBREVIATIONS	iv
EXECUTIVE SUMMARY	v
1 INTRODUCTION	1
1.1 UNWTO-INSTO	1
1.2 Australia's South West Sustainable Tourism Observatory (ASWTO).....	2
1.3 The ASWTO's Key Bodies and the Tourism Research Cluster	4
2 METHODOLOGY.....	6
2.1 Data Collection	6
2.2 Data Analysis Methods	11
3 DESTINATION PROFILE: THE MARGARET RIVER REGION.....	14
3.1 History.....	14
3.2 Socio-Geographic Profile.....	14
3.3 Economic Profile	18
3.4 Governance Structure.....	19
3.5 Tourism Profile.....	22
4 COVID-19: IMPACTS AND RECOVERY STRATEGIES	26
4.1 Qualitative Interviews.....	26
4.2 Quantitative Survey	28
5 KEY SUSTAINABILITY AREAS.....	42
5.1 Tourism Seasonality	42
5.2 Tourism Employment.....	50
5.3 Destination Economic Benefits	52
5.4 Use of Private Accommodation Platforms	61
5.5 Resident Satisfaction	63
5.6 Visitor Satisfaction	75
5.7 Energy Management	77
5.8 Water and Wastewater Management	80
5.9 Solid Waste Management.....	85
5.10 Regional Cycles.....	87
5.11 Inclusion and Accessibility	88
5.12 Landscape Quality and Conservation	90
6 CONCLUSION AND OUTLOOK.....	94
7 REFERENCES	96

LIST OF TABLES

Table 1. Key issue areas, indicators and data collection strategies.....	6
Table 2. Data analysis strategies.....	11
Table 3. Results from multiple regression analysis (logistic regression)	39
Table 4. Overview of the tourist visitations to the Margaret River Region	45
Table 5. Tourism industry sectors.....	51
Table 6. Energy management strategies for the tourism enterprises in the Shire of Augusta-Margaret River.....	79
Table 7. Average annual change in electricity use/costs between 2006/2007 and 2015/2016 in selected tourism attractions and providers	80
Table 8. Percentage of tourism enterprises providing disabled-access facilities and type of facilities.....	89
Table 9. Tourism activities impacts on environmental sustainability.....	92

LIST OF FIGURES

Figure 1. International Network of Sustainable Tourism Observatories	2
Figure 2. Governance of Australia's South West Tourism Observatory (ASWTO).....	4
Figure 3. Map of the Western Australia Tourism Region.....	15
Figure 4. Map of Australia's South West Tourism Region	15
Figure 5. Map of the Margaret River Region	16
Figure 6. Population pyramid of the Margaret River Region.....	17
Figure 7. The economic output of the Margaret River Region.....	18
Figure 8. Employment by sector of the Margaret River Region.....	19
Figure 9. The governance structure of tourism management within the destination	20
Figure 10. Age of respondents	28
Figure 11. Gender of respondents.....	28
Figure 12. Level of formal education of respondents.....	29
Figure 13. Underlying health conditions	29
Figure 14. Affordability of holidays in ASW.....	29
Figure 15. Preferred accommodation in ASW	29
Figure 16. The Financial impact of the COVID-19 pandemic on respondents	30
Figure 17. Motives to visit Australia's South West after the COVID-19 outbreak	30
Figure 18. Potential de-motivators to visit Australia's South West after the COVID-19 outbreak.....	31
Figure 19. Scenarios used in the recovery marketing experiment.....	32
Figure 20. Respondents' willingness to book based on age with no second wave	34
Figure 21. Respondents' willingness to book based on age with second wave	34
Figure 22. Respondents' willingness to book based on underlying health condition with no second wave.....	34
Figure 23. Respondents' willingness to book based on underlying health condition with second wave.....	34
Figure 24. Respondents' willingness to book based on their level of education with no second wave.....	35
Figure 25. Respondents' willingness to book based on their level of education with second wave	35
Figure 26. Respondents' willingness to book based on affordability with no second wave...35	
Figure 27. Respondents' willingness to book based on affordability with second wave.....36	
Figure 28. Respondents' willingness to book based on the accommodation choice of camping in National Park with no second wave	37

Figure 29. Respondents’ willingness to book based on the accommodation choice of camping in National Park with second wave37

Figure 30. Respondents’ willingness to book based on the accommodation choice of Airbnb with no second wave37

Figure 31. Respondents’ willingness to book based on the accommodation choice of Airbnb with second wave37

Figure 32. Respondents’ willingness to book based on the accommodation choice of hotel/ service apartment with no second wave38

Figure 33. Respondents’ willingness to book based on the accommodation choice of hotel/ service apartment with second wave38

Figure 34. Overnight visitation trend to the Margaret River Region.....42

Figure 35. Purpose of visitation to the Margaret River Region43

Figure 36. Gender of the visitors to the Margaret River Region44

Figure 37. Age group of the visitors to the Margaret River Region.....44

Figure 38. Travel party of the visitors to the Margaret River Region44

Figure 39. Daytrip visitation to the Margaret River Region45

Figure 40. Map of the Cape to Cape Track46

Figure 41. Cape to Cape Track visitations at selected monitoring locations at the Leeuwin-Naturaliste National Park47

Figure 42. Seasonality of visitation to Leeuwin-Naturaliste National Park.....48

Figure 43. The annual average of occupancy levels among commercial accommodation providers in the Margaret River Region, 2015 – August 202048

Figure 44. The monthly average of occupancy levels among commercial accommodation providers in the Margaret River Region, July 2014 – August 202049

Figure 45. Occupancy per season among commercial accommodation providers in the Margaret River Region, 2015 - 202050

Figure 46. Top 10 industries in the Margaret River Region by employment impact52

Figure 47. Top 10 industries in the Margaret River Region by economic output and value-added53

Figure 48. Nightly spending of overnight visitors in the Margaret River Region54

Figure 49. Total spending of overnight visitors in the Margaret River Region54

Figure 50. Daily spending of day-trips visitors in the Margaret River Region55

Figure 51. The annual average of daily rates among commercial accommodation providers in the Margaret River Region, 2015 – August 2020.....56

Figure 52. The monthly average of daily room rates among commercial accommodation providers in the Margaret River Region, July 2014 – August 202057

Figure 53. The seasonal average of daily room rates among commercial accommodation providers in the Margaret River Region, 2015 – 202058

Figure 54. The Annual Average of Revenue per Available Room (RevPAR) among commercial accommodation providers in the Margaret River Region, 2015 – August 2020 .59

Figure 55. The monthly average of Revenue per Available Room (RevPAR) among commercial accommodation providers in the Margaret River Region, July 2014 – August 202060

Figure 56. The seasonal average of Revenue per Available Room (RevPAR) among commercial accommodation providers in the Margaret River Region, 2015 – 202061

Figure 57. Location and number of Airbnb listings in Southwestern Regions of Western Australia, February 202062

Figure 58. Distribution of respondents based on gender and age.....63

Figure 59. The place of residence of respondents63

Figure 60. Occupation of respondent64

Figure 61. Respondents’ livelihood dependence on the tourism industry64

Figure 62. Household type of respondents65

Figure 63. Household income of respondents65

Figure 64. Frequency of overnight domestic trips of respondents for the last 12 months66

Figure 65. Frequency of international travels among respondents during their lifetime66

Figure 66. Residents’ perception of tourists’ behaviours in the Margaret River Region67

Figure 67. Residents’ perception of tourism impacts in the Margaret River Region68

Figure 68. Residents’ perception of tourism impacts management in the Margaret River Region69

Figure 69. Residents’ perception of the number of tourists visiting the Margaret River Region before the COVID-19 pandemic and at present (October 2020)70

Figure 70. Residents’ perception of the risk for transmission of COVID-19 in the Margaret River Region from particular tourist categories71

Figure 71. Residents’ opinion of the benefits versus risks in the Margaret River Region related to particular tourist categories71

Figure 72. Residents’ perception of health risks of hosting tourists who have been in the following regions within the past two week72

Figure 73. Residents’ opinion on the effectiveness of containment measures in helping to control the risks of COVID-19 spreading in the Margaret River Region73

Figure 74. Residents’ opinion on the degree of the actual implementation of containment measures in the tourism and hospitality sector in the Margaret River Region74

Figure 75. Residents’ opinion on the importance of tourism for economic recovery after the COVID-19 pandemic in the Margaret River Region74

Figure 76. Residents’ support for the opening of borders to international tourists75

Figure 77. Visitors satisfaction with key attractions and facilities in the Margaret River Region76

Figure 78. Visitor satisfaction with commercial accommodations’ services and facilities in the Margaret River Region77

Figure 79. The average volume of water consumption per account for tourism and hospitality related businesses in parts of the Margaret River Region, 2017-202082

Figure 80. The average volume of water consumption per visitor in hospitality and tourism related businesses in parts of the Margaret River Region, 2017-201983

Figure 81. The average volume of water consumption per account for different types of accommodation enterprises in the Busselton Area, 2011-201984

LIST OF ABBREVIATIONS

Abbreviation	Meaning
AAM	Australian Accommodation Monitor
ABS	Australian Bureau of Statistics
ASW	Australia’s South West
ASWTO	Australia’s South West Sustainable Tourism Observatory
GDP	Gross Domestic Product
GRP	Gross Regional Product
INSTO	International Network of Sustainable Tourism Observatories
IUCN	International Union of Conservation of Nature
IVS	International Visitor Survey
MRBTA	Margaret River Busselton Tourism Association
NVS	National Visitor Survey
SWDC	South West Development Commission
TRA	Tourism Research Australia
TRC	Tourism Research Cluster, Curtin University
TSA	Tourism Satellite Account
TWA	Tourism Western Australia
UNWTO	United Nations World Tourism Organization

EXECUTIVE SUMMARY

The tourism industry plays a pivotal role in economic growth and diversification, contributing 10.3% of the global GDP and generating 330 million jobs worldwide in 2019 alone (WTTC, 2020). Although the tourism industry undoubtedly generates substantial economic benefits, there is also a necessity to monitor socio-cultural and environmental impacts. Sustainable practices are essential in establishing the long-term balance of environmental, economic, and socio-cultural aspects of tourism development (UNWTO, 2005). Aligning with the United Nations World Tourism Organization-International Network of Sustainable Tourism Observatories' objectives, Australia's South West Sustainable Tourism Observatory (ASWTO) systematically monitors sustainability indicators for the Margaret River Region (Phase 1) and Australia's South West (ASW, Phase 2). It does so to support the formulation and implementation of sustainable tourism policies, strategies and management processes.

This report focuses on the Margaret River Region. The Margaret River Region is the most visited tourism sub-region within ASW and comprises the two local government authorities of the City of Busselton and the Shire of Augusta-Margaret River. The region covers an area of approximately 3,700 km² with 50,945 inhabitants. The region is not only famous for its nature-based tourism attractions within a unique coastal landscape, but also for its world-class vineyards and wineries. Listed as a biodiversity hotspot with two IUCN category sites, it is particularly crucial to implement sustainable practices across all tourism activities in the region.

Observations for key sustainability areas:



Seasonality

- The region receives 1.6 million overnight visitors and 1.2 million day-trip visitors per year with domestic visitation dominating. The annual 141,000 international visitors showed an expansive dynamic with 6% p.a. (2009-2019) and even 11% p.a. (2014-2019) growth pre-COVID-19.

- The occupancy rates of commercial accommodation in the Margaret River Region remained relatively stable between 2015 and 2019 with an average of 60% in 2015 and an average of 56% in 2019. Impacts of the COVID-19 pandemic resulted in a relatively modest drop in occupancy rates to 46% for the period January to August 2020. The easing of restrictions in mid-May 2020, with intrastate travel resuming, led to a steep recovery of occupancy rates in the region reaching an unprecedented 61% for the winter month of July 2020.
- As a summer destination, accommodation providers' occupancy rates peak at 70%-80% in January-December. The quietest months with approximately 40% occupancy include June and August (winter).
- Visitation numbers to the Cape-to-Cape Track range from 1,383 annual visits at Deepdene Point to 26,191 visits at Cape Naturaliste Point.



Employment

- The tourism industry in the region generates approximately 2,700 positions of direct employment, that is 13% of the region's total employment, mostly in accommodation and food services.



Destination economic benefits

- Being among the top three economic contributors in the Margaret River Region, the tourism industry generates 9.7% of the regional economic output and 8.9% of the regional value-added (2018).
- In 2019, tourists spent an average of \$73 per night (international visitors) to \$164 per night (domestic visitors). However, it is important to note different lengths of stay and different spending per trip. Total spending over the entire trip to the region was \$788 for international overnight visitors, \$465 for intrastate visitors and \$789 for interstate visitors
- The average daily rate (ADR) and revenue per available room (RevPAR) of commercial accommodation in the region were \$224 (2019) / \$217 (2020, until August) and \$125 (2019) / \$107 (2020, until August) respectively.

- In 2019, 22% of all international overnight visitors to the Margaret River Region were users of private accommodation (short-term) rental platforms.



Resident and tourist satisfaction

- Residents are relatively satisfied with tourists' behaviours and the impact of tourism in the Margaret River Region. They also find that the number of tourists visiting the region is relatively balanced (not too many, not too few). An area of concern is the concentration of tourists in a few hotspots. Residents strongly support initiatives to monitor tourism impacts, to protect natural and cultural assets and to strengthen local benefits of tourism.
- In terms of opening up after COVID-19, residents are very supportive of intrastate travel. They also support international tourist arrivals under strict quarantine regulations and / or proof of vaccination.
- In general, visitors appear very satisfied with the tourist attractions and facilities in the region. Relatively speaking and on average, visitors are least satisfied with accommodation services and most satisfied with the natural attractions.
- The report includes suggestions regarding how to maintain / increase intrastate travel during and immediately after the COVID-19 pandemic.



Energy management

- There is currently no generally accepted set of guidelines for managing sustainable energy practices in the region's tourism industry.
- Some tourism enterprises invest in renewable energy sources, particularly installing solar panels, as a way to implement sustainable energy management practices.



Water and wastewater management

- Water consumption per tourism and hospitality business account and per visitor has been decreasing over the last years. Some categories such as holiday units or restaurants achieved 6% to 10% reduction

annually. Decrease of water consumption in hotels is slightly less pronounced.

- ‘Water Forever: South West’ by Water Corporation and ‘Waterwise Business’ by Busselton Water provide guidelines for sustainable water management in the region, which are also applicable to tourism enterprises.
- A number of tourism enterprises implement sustainable water management practices, by adopting the use of water-wise garden techniques, water saving appliances, self-sufficient water resourcing, and encouraging staff and visitors to reduce water consumption.
- In practising sustainable wastewater management, some of the region’s tourism enterprises implement greywater systems on bathroom and laundry amenities and also use recycled wastewater for watering the garden.



Waste management

- Waste management in the region, under the Capes Regional Organisation of Councils (CAPEROC) framework, focuses on developing and implementing waste minimisation and waste recycling initiatives.
- NGOs and local communities play an important part in initiating sustainable waste management practices.
- Most common practices in sustainable waste management among the region’s tourism enterprises include reducing single-plastic use, providing reusable food and drink containers, using recycled products and providing recycling bins.



Regional cycles

- Many tourism enterprises source local wines from around the region and some also source other products from local producers and/or their on-site gardens.



Inclusion and accessibility

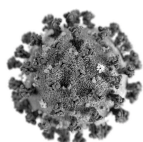
- Many tourism enterprises provide disabled-access facilities on their premises, particularly accessible parking, ramps and accessible toilets.

- An estimated 60% of the commercial accommodations also provide one to four accessible rooms with bigger room space for wheelchair manoeuvre, accessible bathroom (with shower seat), ramp for wheelchair access, and hand railings.



Conservation

- The viticulture and accommodation sectors jointly occupy approximately 3% of the total land in the region.
- Community organisations engage in beach cleaning and rehabilitation, while some wineries implement organic and biodynamic farming methods. Some accommodation providers establish on-site conservation sanctuaries and use eco-friendly products.



COVID-19 impacts

- Motivations of intrastate tourists to visit the region after the COVID-19 outbreak include escaping to nature, reconnecting with family and friends, discovering new places, and relaxing; while potential and hypothetical de-motivators include safety, restrictions, lack of transparent information (e.g., about what is closed, fully open or operating under restricted access conditions), and adding to health risks for locals.
- Women, senior travellers and non-campers are more cautious – vice-versa, men, younger travellers and campers are predicted to be the first movers in a post-pandemic scenario.
- Price-discounts, the implementation of free-cancellation policies and carefully crafted advertising campaigns can boost the willingness of intrastate tourists to book a visit to the region during or after the COVID-19 outbreak. However, data collated in this study also highlights the necessity to prioritise avoiding a second wave or any infections imported by international tourists.

1 INTRODUCTION

1.1 UNWTO-INSTO

The tourism industry is one of the world's most important industries, contributing 10.3% of the global GDP and generating 330 million jobs in 2019 (WTTC, 2020). As an export industry, tourism plays an important role in developing local economies but can fulfil this role only effectively if it adheres to principles of sustainable economic, socio-cultural and environmental development. Sustainable development ensures that the long-term viability of tourism destinations is not jeopardised. The United Nations World Tourism Organization (UNWTO, 2005) defines sustainable tourism as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". In more detail, UNWTO (2005, p.11-12) states that sustainable tourism should:

1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
3. Ensure viable, long-term economic operations, providing fairly distributed socio-economic benefits to all stakeholders. This includes providing stable employment and income-earning opportunities and social services to host communities and contributing to poverty alleviation.

Measuring and monitoring impacts of tourism on sustainability can be challenging due to the multi-faceted nature of tourism, but efforts are being undertaken to develop heuristics and good practices to follow. A key initiative is the UNWTO International Network of Sustainable Tourism Observatories (UNWTO-INSTO), which is committed to the sustainable and resilient growth of tourism. Created in 2004, the purpose of UNWTO-INSTO is to continuously and systematically monitor sustainability indicators of destinations at a sub-national level to support the formulation and implementation of sustainable tourism policies, strategies and management processes, thus guiding

improvements in sustainable development practices globally. INSTO Observatories help to encourage good practices worldwide and support local stakeholders in data collection and analysis to enable evidence-based decision making, promote capacity building and facilitate networking. As of August 2020, there are a total of 30 observatories in operation worldwide.

Figure 1.

International Network of Sustainable Tourism Observatories



Note. This map represents the distribution of a total of 30 observatories in the UNWTO INSTO Network (as of August 2020), including the ASWTO. Copyright by UNWTO-INSTO, 2020

1.2 Australia's South West Sustainable Tourism Observatory (ASWTO)

Australia's South West Sustainable Tourism Observatory (ASWTO) is currently the only UNWTO-INSTO Observatory in Australia. The Australia's South West (ASW) tourism region covers the Southwest corner of Australia and stretches from south of Mandurah to Albany and east to Bremer Bay. It is the second most visited tourism region in Western Australia (WA), with 3.27 million overnight visitors in 2019 (Tourism WA, 2020b). The popularity of the ASW tourism region is due to the combination of natural attractions, including a remarkable coastline, superb beaches, old-growth forests, and a diverse marine environment, with high-quality wine, food and arts. The

ASW region is broken into four sub-regions: Bunbury Geopraphe, the Margaret River Region, Southern Forests and Valleys, and the Great Southern Region.

The Margaret River Region, one of these subregions, is a tourism region located in the westernmost part of ASW. The destination is internationally recognised, boasting two International Union for Conservation of Nature (IUCN) category sites, rich nature-based tourism products and a world-class wine region with gastronomic attractions. Tourism is a key contributor to the region's economy, accounting for 14.1% of the Gross Regional Product and 19.5% of employment (TRA, 2018).

The long-term prosperity of the ASW and Margaret River regions depends on a fragile balance between regional development and the preservation of a unique natural environment, which sits within a rare biodiversity hotspot (one of only 25 original global hotspots for wildlife and plants) – the first one identified in Australia. Biodiversity hotspots are defined as regions "where exceptional concentrations of endemic species" are found, but at the same time this diversity is vulnerable to loss of habitat (Myers et al., 2000). The Southwest Australian Ecoregion is home to more than 4,000 species of endemic plants and 100 endemic vertebrates. Without a doubt, this exceptional natural context is a key asset for tourism development in the region, making it indispensable to monitor impacts closely. At the same time, the region, as has happened to other regional areas in Australia, faces a latent risk to come under pressure of interregional migration of permanent residents towards metropolitan areas. Maintaining a solid rate of economic development is thus equally essential to ensure the region remains attractive for residents and tourists alike.

Australia's South West Sustainable Tourism Observatory (ASWTO) follows a stepwise approach in its establishment. In the current Stage 1 of its operation, the Observatory focusses on the area known as the 'Margaret River Region' including the City of Busselton and the Shire of Augusta-Margaret River. Once established, Stage 2 will involve extending the measurement area to be inclusive of the entire ASW region.

The purpose of the Australia's South West Sustainable Tourism Observatory (ASWTO) is to systematically monitor sustainability indicators for the Margaret River Region (Phase 1) and ASW (Phase 2) to support the formulation and implementation

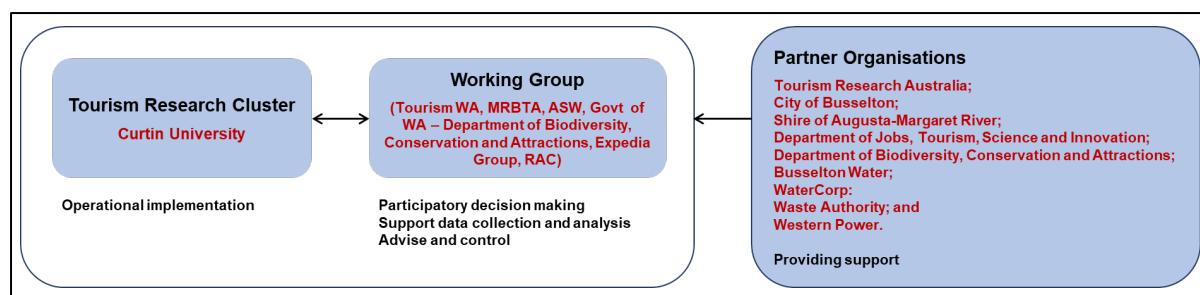
of sustainable tourism policies, strategies and management processes. Its main objective is to contribute to ensuring **tourism development for regional development in a sensitive environment**.

1.3 The ASWTO's Key Bodies and the Tourism Research Cluster

The Observatory is structured around two key bodies (see Figure 2): (1) The Tourism Research Cluster at Curtin University and (2) a Working Group of key stakeholders including Tourism WA, ASW, Margaret River Busselton Tourism Association (MRBTA), the Parks and Wildlife Service of the Department of Biodiversity, Conservation and Attractions (DBCA), the Royal Automobile Club of Western Australia (RAC) and Expedia Group.

Figure 2.

Governance of Australia's South West Sustainable Tourism Observatory (ASWTO)



The Tourism Research Cluster (TRC) at Curtin University, founded in 2010, is a vibrant, interdisciplinary and world-class rated research group (see Excellence in Research in Australia) of internationally-recognised academics from diverse backgrounds including marketing, management, geography, public policy, spatial sciences, cultural anthropology and statistics. Tourism and hospitality research at Curtin University was recently confirmed to be among the World's Top 50 according to the prestigious Shanghai's Global Ranking of Academic Subjects (2017, 2018, 2019, 2020). In addition to its current 20 academic members at Curtin University's Bentley campus in Western Australia, the TRC also includes a number of members based at Curtin University campuses in Malaysia and Mauritius, and maintains Adjunct relationships with renowned international tourism academics.

The TRC has become particularly known for its collaboration with government and industry and its regular international symposia. TRC members have conducted many applied research projects in Western Australia and beyond, including recent projects on product development for and travel patterns of Asian visitors in Western Australia as well as Aboriginal tourism in Western Australia. The TRC has also been monitoring the impact of Airbnb on tourism in Western Australia (<http://bcecreports.edu.au/airbnb/>) and has been carrying out regular social media listening regarding awareness and attractiveness of Perth as a study destination. More information on the TRC, its members and projects can be found under <https://businesslaw.curtin.edu.au/our-research/centres-and-institutes/tourism-research-cluster/>

2 METHODOLOGY

2.1 Data Collection

Based on their source, data can be categorised into primary and secondary data. Primary data are classified as original information collected directly by researchers through questionnaires, interviews, focus group discussions, observations, and experiments; secondary data are collected from other sources, and have originally been gathered by other people (Saunders et al., 2016).

The table below details the data to be addressed and monitored through the Observatory, based on the UNWTO-INSTO's guidelines on nine sustainable tourism development issue areas as well as selected destination-specific issue areas.

Table 1.

Key Issue Areas, Indicators and Data Collection Strategies

No.	Key Issue Areas	Indicators	Type of Data	Sources
1.	Tourism seasonality	Tourist visitations	Secondary	NVS-IVS TRA, TWA
		Accommodation occupancy rate	Secondary	STR
		Trail use – Cape to Cape	Secondary	DBCA
2.	Tourism employment	Direct tourism employment	Secondary	TSA, ABS, REMPLAN
3.	Destination economic benefit	Tourism economic contribution	Secondary	TSA, ABS, REMPLAN
		Tourist spending	Secondary	NVS-IVS TRA
		Accommodation daily rates and revenue per available room	Secondary	STR
4.	Resident and visitor satisfaction	Resident satisfaction	Primary	Resident survey
		Visitor satisfaction	Secondary	TripAdvisor, Expedia Group, MRBTA
5.	Energy management	Regulations and actions to manage energy consumption in the tourism industry	Secondary	Western Power, Synergy, Local Shires
		Energy consumption	Secondary	Western Power, Synergy
6.	Water management	Regulations and actions to manage water consumption in the tourism industry	Secondary	WaterCorp, Local Shires, Busselton Water
		Water consumption	Secondary	WaterCorp. Busselton Water

No.	Key Issue Areas	Indicators	Type of Data	Sources
7.	Wastewater management	Regulations and actions to manage wastewater in the tourism industry	Secondary	Waste Authority, Local Shires
		Wastewater production	Secondary	Waste Authority, Local Shires
8.	Solid waste management	Regulations and actions to manage solid waste in the tourism industry	Secondary	Waste Authority, Local Shires
		Solid waste production	Secondary	Waste Authority, Local Shires
9.	Regional cycles	Locally produced food, drinks, goods sourced by tourism enterprises	Secondary	MRBTA, Local Shires
10.	Inclusion and accessibility	Percentage of rooms in commercial accommodation establishments accessible for people with disabilities	Secondary	Access WA, MRBTA
		Percentage of attraction points accessible for people with disabilities	Secondary	Access WA, MRBTA
		Percentage of restaurants accessible for people with disabilities	Secondary	Access WA, MRBTA
11.	Landscape, biodiversity, and conservation	Regulations and actions in supporting conservation and management of local biodiversity and landscapes	Secondary	DBCA
12	COVID-19 impacts	Visitation motivators and de-motivators	Primary	Qualitative interviews
		Probability of booking a visit under different conditions	Primary	Experiment / survey

2.1.1 Primary Data Collection

Given the unprecedented impact of the COVID-19 pandemic on the tourism industry, for the first phase of primary data collection, the Observatory focused on COVID-19 implications and on collecting residents' satisfaction with tourism development in the Margaret River Region.

Resident satisfaction: The resident satisfaction survey was conducted online and aimed to recruit approximately 100 participants. The objective was both to identify average satisfaction levels of residents with the region's tourism development and to detect eventual early warning signals.

COVID-19 implications: To explore the impact of COVID-19 on intrastate tourists' willingness to visit the region, the study employed qualitative interviews and a quantitative survey. The qualitative research consisted of 40-45 minutes semi-structured interviews with a total of 18 respondents (comprising 8 tourists and 10 tourism experts) to identify motivators and de-motivators to visit Australia's South West after the regional travel barriers were lifted in May 2020. Furthermore, the quantitative research aimed to identify intrastate tourists' willingness to book a visit to the region after the COVID-19 outbreak. A total of 666 previous ASW intrastate visitors who reside outside ASW were sourced from the DBCA Parks and Wildlife Service's and the RAC's customer databases and were surveyed.

2.1.2 Secondary Data Collection

A key data source for tourism visitation is Tourism WA, the Western Australian state government's tourism agency. Tourism WA collates data from Tourism Research Australia (TRA), which monitors both international and domestic visitation across Australia using multiple surveys:

- **National Visitor Survey (NVS):** The NVS annually samples 120,000 Australian residents via telephone survey. Data collected include the place of residence, other demographics, destination location for day trips and outbound trips, stopover location(s) for domestic overnight trips, trip purpose, leisure activities, travel party and trip expenditure (spending). Results are published quarterly based on year-ending totals across a range of geographical scales including national, state, tourism regions and local government areas.
- **International Visitor Survey (IVS):** The IVS annually samples 40,000 departing international travellers, intercepted at eight major international airports around Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) and contains 100 questions to collect data on a variety of items including place of residence, other demographics, number of visits, travel party, purpose of visit and places visited, activities undertaken and trip expenditure (spending). Results are published quarterly based on year-ending totals across a range of geographical scales including national, state, tourism regions and local government areas.

- **Tourism Satellite Account (TSA):** The TSA is compiled annually with data disaggregated into national, state and tourism region levels. Data collected and analysed includes direct and indirect tourism income presented as both Gross Value Added (GVA) and Gross Regional Product (GRP) as well as direct and indirect tourism employment. Both income and employment are disaggregated into specific tourism industries (i.e. accommodation, retail trade and transport). Results are published and presented on an annualised basis, and it is noted that data validity and reliability may vary at a regional level due to increased sampling error.

Third-party data analytics provider STR collects data specific to accommodation performance. Data obtained from STR (2020) include the performance of 11 commercial accommodation providers in the Margaret River Region (i.e., the City of Busselton and the Shire of Augusta-Margaret River). Accommodation providers included in the dataset range from “Economy Class’ (i.e., budget) to ‘Luxury’.

The employment and economic contribution data are collected from REMPLAN, which draws on information from various agencies, including local councils and the Australian Bureau of Statistics (ABS). The employment and economic impact information on the Margaret River Region are the result of the consolidation of data from the City of Busselton and the Shire of Augusta-Margaret River.

The study also collects visitor satisfaction data from TripAdvisor and Expedia reviews. In addition to this, the following organisations and studies provide further insights on visitor experience and satisfaction:

- **Tourism Western Australia (Tourism WA) – Visitor Experience and Expectations Research (VEER):** The VEER is an annual survey that examines the satisfaction levels of tourists visiting Western Australia across a range of metrics including demographics, purpose of visit, motivation to visit (key attractions) as well as expectations/performance of attractions. The sample size is 400 visitors, results are published annually, and data are not region-specific.

- **Shire of Augusta-Margaret River** – Tourism Strategy Demand Analysis Visitor Survey 2010-11: This was a one-off study conducted by the Shire to guide land use and infrastructure planning within the local government area. The study sampled 2,376 respondents, conducted as face-to-face intercept surveys during four separate periods (Dec, Mar, Jul, Sept) to capture seasonal fluctuations. The survey included 26 questions, collecting data on demographics, purpose of visit, key attractions of interest and expenditure.
- **The Margaret River Busselton Tourism Association (MRBTA)** is a not-for-profit organisation that operates seven tourist attractions and has more than 700 members across the region. MRBTA collects visitor feedback from TripAdvisor reviews and Google reviews on visitor centres and attractions. They also conduct live web chats with customers at margaretriver.com, conduct satisfaction surveys and cruise ship passenger surveys.

There are multiple organisations that collect data of relevance to estimate environmental impacts within the region. They include:

- Energy consumption and management:
 - **Western Power:** Owned by the Western Australian (WA) State Government. It is responsible for the maintenance of the energy network within WA.
 - **Synergy:** Owned by the WA State Government. It is responsible for energy generation and supply
- Water consumption and management:
 - **Water Corporation:** Owned by the WA State Government. It is responsible for the supply and network maintenance of water, wastewater and drainage.
- Solid waste management:
 - **Waste Authority:** Owned by the WA State Government. It is responsible for the implementation of the Waste Resource and Recovery Act 2007 through coordination between relevant government organisations.
 - **Shire of Augusta-Margaret River:** Local government within the Margaret River Region.
 - **City of Busselton:** Local government within the Margaret River Region.

2.2 Data Analysis Methods

In general, data can be distinguished into quantitative data and qualitative data. Standard analysis techniques for both types of data have been employed. Analysis details for each key issue area are summarised in the following table (Table 2).

Table 2.
Data Analysis Strategies

Indicators	Analysis Method	Description
Tourism seasonality		
Tourist visitation	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of annual distribution and growth rate.
Seasonality	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of monthly distribution.
Accommodation occupancy rate	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of monthly distribution and annual growth rates.
Trail use – Cape to Cape Track	Quantitative descriptive analysis	Analysis of the distribution of visits/detected activity when a person passed a specific point on the track.
Tourism employment		
Direct tourism employment	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of distribution/frequency.
Destination economic benefit		
Tourism's economic contribution	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of distribution/frequency.
Tourist spending	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of annual distribution and growth rate.
Accommodation rates and revenue	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Margaret River Region. 2. Analysis of monthly distribution and annual growth rates.
Resident and visitor satisfaction		
Resident satisfaction	Quantitative descriptive and inferential analyses	1. Descriptive analysis of resident satisfaction with tourism development and tourist behaviour. 2. Descriptive analysis of resident preferences regarding tourism development post-COVID-19. 3. Selected inferential analyses.
Visitor satisfaction	Quantitative descriptive analysis	4. Compilation of visitor satisfaction reviews/scores from various tourist attractions, accommodations, and facilities with more than 50 online reviews (based on TripAdvisor reviews). 5. Calculation of average satisfaction scores for each type of establishment, i.e., natural attraction, accommodation, restaurant.

FINAL ANNUAL PROGRESS REPORT

Indicators	Analysis Method	Description
Visitor satisfaction with accommodation	Quantitative descriptive analysis	<ol style="list-style-type: none"> 1. Compilation of guest satisfaction reviews/scores from commercial accommodations with more than 100 online reviews from Expedia regarding their services, cleanliness, facilities etc. 2. Calculation of average satisfaction scores for cleanliness, staff & services, amenities and property conditions & facilities.
Energy management		
Regulations and practices	Qualitative content analysis	<ol style="list-style-type: none"> 1. Compilation of regulations on energy management from local councils and related agencies. 2. Identification of sustainable energy management practices of tourism enterprises from various websites.
Energy consumption	Quantitative descriptive analysis	Analysis of annual change in electricity use and costs per tourism enterprise
Water and wastewater management		
Regulations and practices	Qualitative content analysis	<ol style="list-style-type: none"> 1. Compilation of regulations on water and wastewater management, collected from local councils and related agencies. 2. Identification of sustainable water and wastewater management actions of tourism enterprises, based on various websites.
Water consumption	Quantitative descriptive analysis	Analysis of annual water consumption (volume) per tourism enterprise
Solid waste management		
Regulations and practices	Qualitative content analysis	<ol style="list-style-type: none"> 1. Compilation of regulations on solid waste management, collected from local councils and related agencies. 2. Identification of solid waste management practices of tourism enterprises, based on various websites.
Regional cycles		
Practices	Qualitative content analysis	Identification of practices of tourism enterprises towards maximising the utilisation of local/regional ingredients/resources and products, based on various websites.
Inclusion and accessibility		
Percentage of tourism enterprises accessible for people with disabilities	Qualitative content analysis & quantitative descriptive analysis	<ol style="list-style-type: none"> 1. Compilation of data on the type of disabled-access facilities (and rooms) provided by tourism enterprises, collected from Access WA and MRBTA websites. 2. Analysis of the proportion of disabled-access properties for each type of tourism enterprises, i.e., accommodation, tourist attractions, restaurants etc.
Landscape, biodiversity, and conservation		
Accommodation rooms supply	Quantitative descriptive analysis	<ol style="list-style-type: none"> 1. Accumulation of room numbers from commercial accommodation providers with more than 5 rooms 2. Analysis of the cumulative annual supply and annual growth rate of the total commercial room supply.
Regulations and practices	Qualitative content analysis	<ol style="list-style-type: none"> 1. Compilation of regulations on biodiversity management and conservation, collected from local councils and related agencies. 2. Identification of conservation practices of tourism enterprises, based on various websites.
COVID-19 impacts		

FINAL ANNUAL PROGRESS REPORT

Indicators	Analysis Method	Description
Visitation motivators and de-motivators	Qualitative content analysis	Exploration of key themes that motivate and de-motivate to visit the region, based on semi-structured interviews.
Probability of booking a visit	Univariate, bivariate and multivariable analyses	<ol style="list-style-type: none">1. Univariate descriptive analysis of intrastate tourists' willingness to book after the COVID-19 outbreak2. Bivariate analysis to identify the relationship between tourists' willingness to book and other factors under different scenarios.3. Multivariable analysis to identify the impacts of various variables on tourists' willingness to book.

3 DESTINATION PROFILE: THE MARGARET RIVER REGION

3.1 History

Wadandi and Bibbulmun people have been living in Australia's Southwest and Margaret River Region areas for at least 50,000 years and exert a strong influence on the region. The modern history of the region took a sudden turn with the arrival of early colonial settlers in the first half of the 19th century. European settlement in the wider area for agricultural purposes started in the 1830s. However, early attempts at creating an agricultural or timber industry base for British settlement were difficult (Jones, 2016; Sanders, 2005). Early tourism initiatives in the region coincided with the "discovery" of limestone caves in the early 20th century (Sanders, 2005). "Yallingup Cave"/"Ngilgi Cave" was the first to open for public access around 1900. The establishment of a "Caves Committee" in 1901 by the government to develop the area's caves into a national attraction can be seen as a first concerted effort towards the establishment of the tourism industry in the region.

Advancements in mobility in the post-war period made travelling to the Margaret River Region easier for visitors from Perth (Jones, 2016). Drifters rediscovered the areas cleared by early settlers in the 1950s and 1960s in search for alternative lifestyles. The drifters and hippies have since left a significant imprint on the region by emphasising environmentally sustainable practices. This development of the Margaret River Region into a "surf and hippie hangout" coincided with the beginning of the region's winemaking in the 1960s, which had a strong impact on its further development. Without necessarily intending it, surfies and vigneron sparked a renewed interest in the Margaret River Region, which has continued to this day.

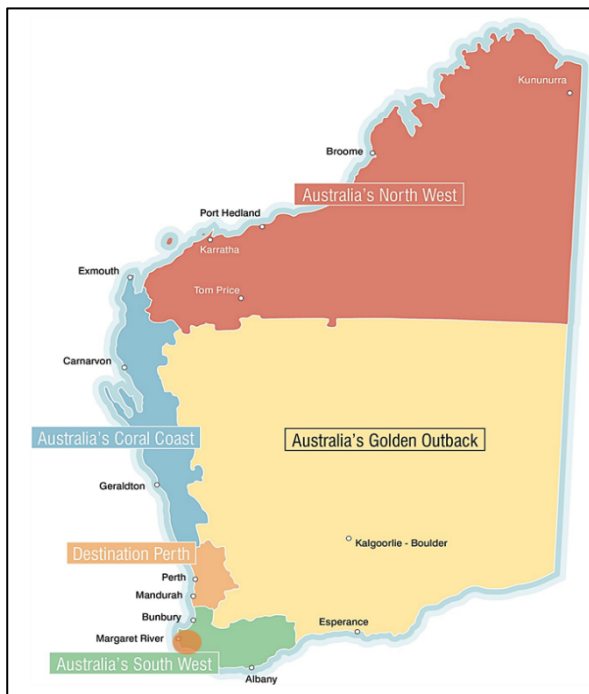
3.2 Socio-Geographic Profile

ASW is one of five geographically demarcated tourism regions within Western Australia (see Figure 3), besides 'Destination Perth', 'Australia's Golden Outback', Australia's Coral Coast and 'Australia's North West' (Pforr, 2007; Pforr, Pechlaner, Volgger and Thompson, 2014). ASW is divided into the Bunbury Geographe, Great Southern, Margaret River Region and Southern Forests and Valleys (Figure 5). The

Margaret River Region is the main tourism region in ASW and the focus of Phase 1 activities of the Australia’s South West Sustainable Tourism Observatory (ASWTO). The Margaret River Region is located 250 km south of Western Australia's capital city, Perth, and covers approximately 3,700 km². Two local government authorities govern the region: the City of Busselton and the Shire of Augusta-Margaret River. As shown in Figure 4, the Margaret River Region covers Busselton, Dunsborough, Yallingup, Cowaramup, Margaret River, Augusta and other towns.

Figure 3.

Map of the Western Australian Tourism Regions



Note. This map represents the five tourism regions of Western Australia. Copyright by Tourism Western Australia, 2019

Figure 4

Map of Australia’s South West Tourism Region



Note. This map represents the four tourism subregions of ASW. Copyright by Australia’s South West Inc.

Figure 5.
Map of the Margaret River Region

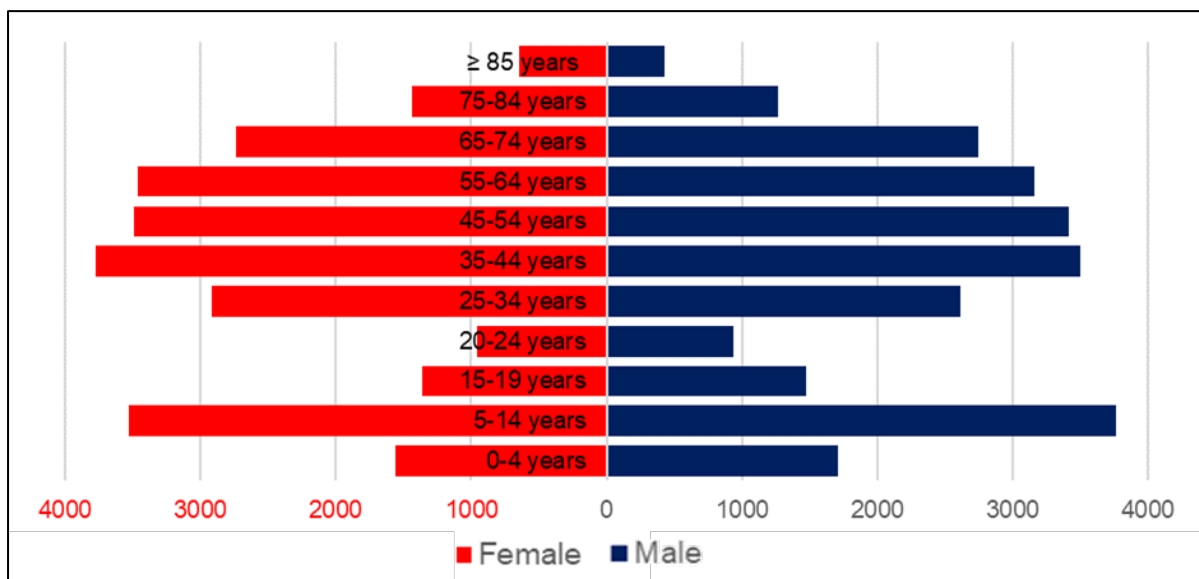


Note. Copyright by The Margaret River Busselton Tourism Association (MRBTA)

The Margaret River Region is characterised as a coastal area, encompassing Geographe Bay, Cape Naturaliste and Cape Leeuwin as major landmarks. The region also includes two IUCN category sites, namely the Leeuwin-Naturaliste National Park (191 km²) and the Ngari Capes Marine Park (1,238 km²). The region is also recognised as a biodiversity hotspot as it exhibits high levels of species endemism as well as high levels of threat, namely at least 1,500 species of endemic vascular plants and primary vegetation depletion greater than 70% (Myers et al., 2000; English and Keith, 2015). The region's Mediterranean climate provides ample rainfall and sustains a wide variety of agricultural activities, most prominently grape wine production.

Based on the Australian Bureau of Statistics 2016 Census of Population and Housing, the region has a population of 50,945 inhabitants with an average density of 14 people per km². The population is concentrated in the major town centres of Busselton, Margaret River, Dunsborough, and Augusta. The region's population accounts for 30% of the South West's population and for 2% of the total population in Western Australia. There is a slightly larger share of females (51%). The population pyramid in Figure 6 displays that the Margaret River Region exhibits a gap in the age groups between 15 and 25.

Figure 6.
Population Pyramid of The Margaret River Region



Note. The aggregated population of the City of Busselton and the Shire of Augusta-Margaret River. Based on the Australian Bureau of Statistics 2016 Census of Population and Housing. Own elaboration and illustration.

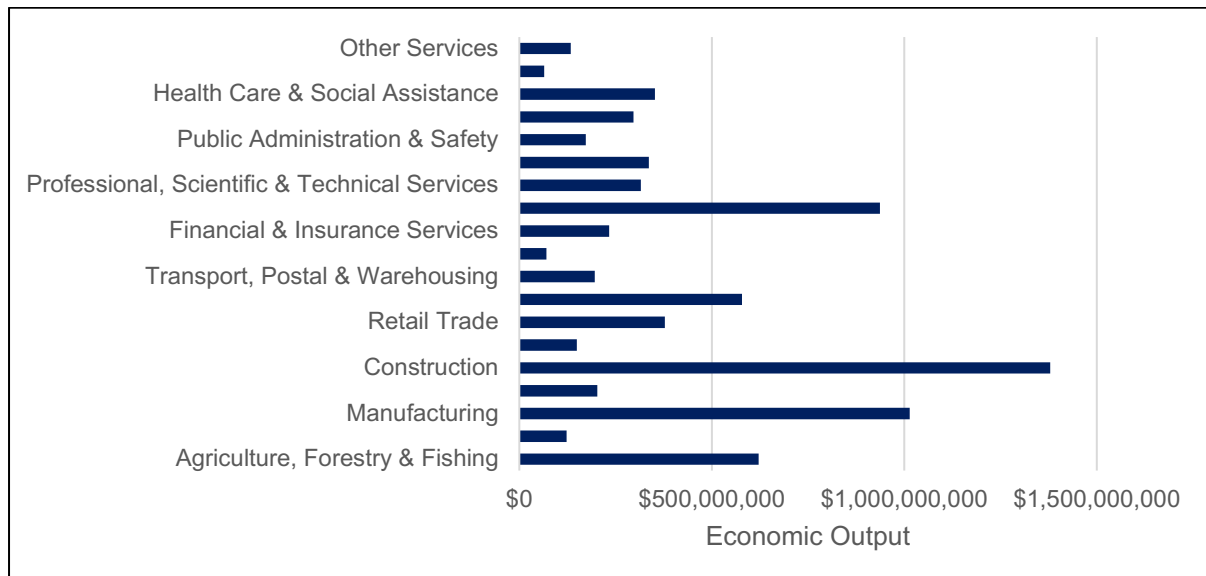
3.3 Economic Profile

With a Gross Regional Product (GRP) of \$3.9 billion, the region is estimated to contribute up to a quarter of the South West's GRP and 1% of Western Australia's Gross State Product (GSP). The Australian Bureau of Statistics (2019) recorded a GRP per capita of \$76,054 in the Margaret River Region, which is approximately 30% lower than the State's per capita GRP.

While the GRP captures the gross value added in the region, the economic output represents the overall sales of goods and services (BITRE, 2018). The Margaret River Region generates an estimated \$7.614 billion in economic output. This number represents 24% of the South West's output and 1% of the output generated in Western Australia. The largest contributors to the Margaret River Region's economy are construction (18%), manufacturing (13%), rental, hiring & real estate services (12%) and agriculture, forestry and fishing (9%). Accommodation and food services account for 8% and arts and recreation services for 1% of the region's economic output (see Figure 7).

Figure 7.

The Economic Output of Margaret River Region

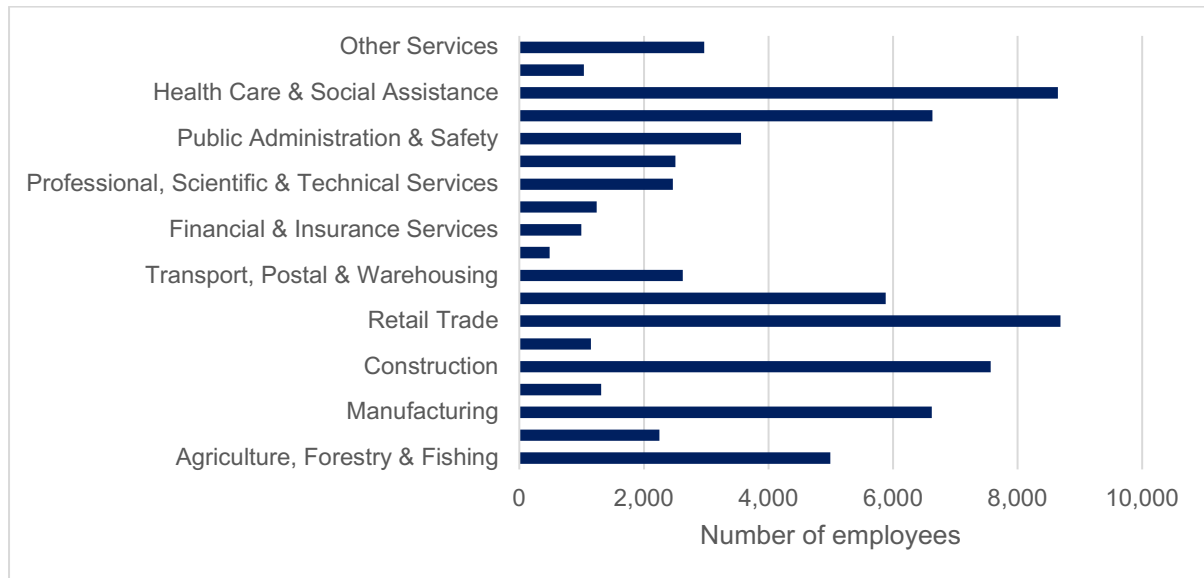


Note. The aggregated economic output of the City of Busselton and the Shire of Augusta-Margaret River. Based on the Australian Bureau of Statistics 2016/2017 National Input-Output Tables collaborated by REMPLAN (2020a). Own elaboration and illustration.

There are an estimated 20,744 jobs in the Margaret River Region which account for 29% of total jobs in the South West. Figure 8 highlights the distribution of jobs among sectors with retail trade (13%) and accommodation and food services (13%) being the largest providers of jobs.

Figure 8.

Employment by Sector of The Margaret River Region



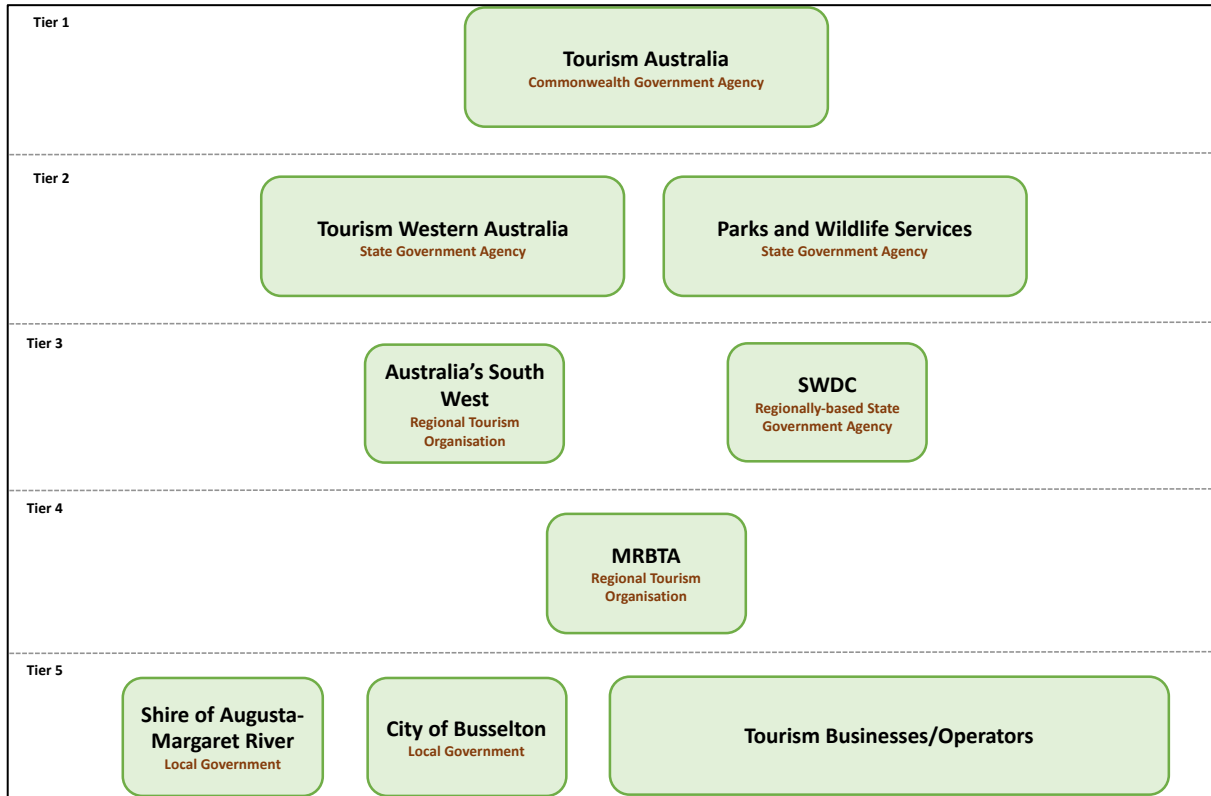
Note. Aggregated employment of the City of Busselton and the Shire of Augusta-Margaret River. Based on the Australian Bureau of Statistics 2016 Census of Place of Work Employment collaborated by REMPLAN (2020a). Own elaboration and illustration.

3.4 Tourism Governance Structure

Tourism within the destination is governed in a tiered system incorporating multiple key stakeholders, including several levels of government agencies and non-government organisations. Figure 9 provides a simplified graphical representation of this structure.

Figure 9.

The Governance Structure of Tourism Management within the Destination



Note. As tourism is a cross-sectional policy area, the relevance of additional government departments and agencies operating in areas such as fishing and agriculture (and others) is recognised

Tourism Australia, the federal Australian Government tourism agency, has set the Tourism 2020 strategic agenda with the key goal of doubling the value of tourism (domestic and international) within Australia from \$70 billion in June 2011 to \$140 billion by December 2020 (Tourism Australia, 2020).

Tourism Western Australia (Tourism WA) is the state government tourism agency for Western Australia. Tourism WA is responsible for guiding the growth of Western Australia's value of tourism to \$12 billion as part of the Australian Government's Tourism 2020 strategy. Its key function is to partner with other state government agencies and industries to 1) market Western Australia as a tourism destination, by running campaigns such as "Wander out Yonder" or "Adventure Awaits", 2) to sponsor major events to attract visitation, and 3) to facilitate major tourism infrastructure and investment (Tourism Australia, 2011; Tourism WA, 2018).

Australia's South West (ASW) is a Regional Tourism Organisation (RTO) that is co-funded by Tourism WA and a membership base of local tourism operators. It partners with Tourism WA to aid in the execution of their tourism objectives at a regional level. ASW represents the four sub-regions of Margaret River, Great Southern, Bunbury Geographe and Southern Forests and Valleys.

The Margaret River Busselton Tourism Association (MRBTA) is a private, membership-based tourism association established in 2015, uniting two previously competing tourism associations: the Augusta Margaret River Tourism Association and the Geographe Bay Tourism Association. Their merger has since allowed the development of the regional umbrella brand, 'Your Margaret River Region', which is managed and facilitated by MRBTA. MRBTA works closely with 780 local tourism operators and operates six cave and lighthouse-based tourist attractions as well as four visitor centres to present a coordinated regional tourism product.

The South West Development Commission (SWDC) is part of the Western Australian State Government. The organisation aims to aid in the development of the South West region by partnering with communities, government, businesses and industry to identify and support projects that benefit the region, thus developing the region's economy. While servicing all industries, tourism is one of SWDC's priority areas. Specifically, SWDC's key focus areas in relation to tourism include trade and investment facilitation, market and consumer insights, and regional growth opportunities.

ASW, MRBTA and SWDC generally follow a collaborative approach in supporting tourism development and marketing although their territorial competence areas do not overlap completely. While ASW has its main focus on marketing, SWDC concentrates on development. MRBTA offers marketing, booking and visitor services specifically for the Margaret River Region and runs a number of attraction points.

Finally, the **City of Busselton** and the **Shire of Augusta-Margaret River** are the two local governments in the Margaret River tourism sub-region. They are in charge of

providing resident amenity services such as waste management as well as approvals related to land use and development.

3.5 Tourism Profile

As highlighted earlier, the Margaret River region has a diverse tourism offering and regional identity centred around nature-based attractions and agricultural produce.

Key attractions include:

- Beach and aquatic recreation (e.g., surfing, fishing, diving)
- Wine and food (e.g., wineries, breweries, dining, local produce)
- Natural attractions (e.g., caves, forest, coastline)
- Adventure activities (e.g., Cape to Cape hiking track, 4x4 driving, diving, whale watching)
- Heritage sites (e.g., Busselton Jetty, lighthouses)
- Events (e.g., Gourmet Escape, sporting events)

There is a diverse calendar of events throughout the year, which is championed by key events such as the Gourmet Escape and Cabin Fever within the wine and food sphere, the Margaret River Pro surfing event as part of the World Surfing League, IRONMAN Western Australia and the Busselton Jetty Swim within the sports and adventure area.

MRBTA has organised the branding and communication of tourism products around five key pillars (MRBTA, 2019): (1) nature and environment, (2) active and adventure, (3) wine and wineries, (4) eat and drink as well as (5) arts and wellbeing.

Theme 1: Nature and Environment

The destination is ranked as a global top 10 biodiversity hotspot and is home to two IUCN category parks. On land is the Leeuwin-Naturaliste National Park, and surrounding this is the Ngari Capes Marine Park. Accordingly, nature-based attractions can be categorised as either land-based or water-based.

On land, natural attractions include forestry reserves located within the National Park showcasing Tuart and Karri trees as well as wildflowers and bushland. Furthermore, the region is home to a network of over 150 limestone caves. Four of these caves

(Mammoth, Lake, Jewel and Ngilgi) have been fitted with boardwalk access to accommodate the mass market, while there is a range of caves that are accessible to the adventure tourist via specialised abseiling and climbing tours. These caves also hold great significance for the first inhabitants of the area, the Wadandi and Bibbulmun Noongar people, who have lived in this area for at least 50,000 years. Within the National Park are a network of four-wheel-drive tracks, walking trails as well as a range of campsites.

On the water, natural attractions include the coastline, home to numerous white sandy beaches and surf breaks. The coastline is surrounded on three sides by ocean including where the Indian and Southern Oceans meet at Cape Leeuwin in the south of the region and the secluded Geographe Bay in the north of the region. Within Geographe Bay is the Busselton Jetty, the longest wooden jetty in the southern hemisphere (1,841m), which is equipped with an underwater observatory at its end and a rail service providing an excellent level of access. Both the coastline and ocean offer opportunities for activity-based tourism as will be elaborated on in the next section.

Theme 2: Active and Adventure

The nature-based tourism product is activated through a range of activities and access networks for all levels of capability and experience. Walking and hiking is made possible through a range of walking trails, most notably the long-range "Cape to Cape" and "Bibbulmun" Tracks. Cycling is accommodated via road networks as well as specialised mountain bike trails. Vehicle access to activities is also made possible via the road network as well as four-wheel driving tracks to provide access to the coastline and campsites. Land-based adventure activities such as rock climbing, caving and horse riding are offered by a range of specialised tour operators. There are two golf courses within the region and scenic flights allow tourists to take in the natural splendour of the region from the air.

Water-based attractions are varied along the 138 km of spectacular coastline and target the full spectrum of tourists. The region is known for its range of more than 70 world-class surf breaks stretching between Cape Naturaliste and Cape Leeuwin.

Some of these are accessible by road, but several breaks require a four-wheel drive to access. The Margaret River Pro event is part of the World Surf League Championship Tour and takes place annually in April, acting as a key promotional device for surfing in the region, which also hosts a number of surf schools. Beaches present an opportunity for swimming, stand up paddle-boarding and canoeing, snorkelling and beach fishing. There are nine publicly accessible boat ramps within the destination, presenting ample access and opportunity for boating activities such as fishing, scuba diving and water skiing. In regards to scuba diving, one key attraction is the sunken wreckage of the HMAS Swan in Geographe Bay. It requires a permit for public access but is also serviced by a range of tour operators. Lastly, whale watching is popular during their annual migration season of June to December and can be undertaken from vantage points along the coastline, lighthouses as well as through a range of tour operators.

Theme 3: Wine and Wineries

The Margaret River wine region with its 150 wine producers and 5,000 ha of vineyards only produce a small percentage of the total Australian wine output (about 3%), but the region accounts for approximately 20% of Australia's premium wine segment (Thomas et al., 2011; Galbreath, 2014). As a tourism product, this is showcased via more than 95 cellar doors offering a range of services such as wine tasting, winery and vineyard tours, dining, gallery displays and offering a range of other local produce. Over 20 wine tour companies also service the winery cellar doors. A week-long annual flagship wine and food event, the "Gourmet Escape" which takes place in November, offers access to and promotion of these attractions in a diverse number of ways.

Theme 4: Eat and Drink

Leveraging the increased recognition as a premium wine region, the Margaret River Region has seen immense growth in other gastronomic attractions, such as restaurants and cafes, which are commonly situated within the wineries themselves. They offer a range of dining experiences from award-winning fine dining to casual family-friendly eating. Furthermore, there are nine micro-breweries currently in operation within the region, which also feature family-friendly dining experiences. Lastly, local produce forms another key attraction offered by chocolatiers, olive and

olive oil producers, wood-fired bread bakeries, ice creameries, cheesemakers, venison farmers, honey producers and confectioners all with tourism-centric customer storefronts.

Theme 5: Arts and Wellbeing

Wellness and beauty spas are growing as another segment of the tourism product with an increasing number of beauty therapy and massage spas in operation (Pforr, Hughes, Dawkins and Gaunt, 2014). Moreover, there is a wide range of arts and crafts produced within the region. Supported by the Western Australian Indigenous Tourism Operators Council (WAITOC), Indigenous tourism has a small but growing representation within the region. For instance, the Yallingup-based Koomal Dreaming Cultural Experiences is among the leading Aboriginal tourism businesses in Western Australia.

The Wardandi people, constituting the local Indigenous community, refer to the region's central waterway, the Margaret River, as *Wooditchup*, which was named after the magic man *Wooditch*. Archaeological evidence points to human activity in the area dating back up to 48,000 years, making Devil's Lair cave, for example, which is situated at the southern end of the cape, one of the oldest sites of human settlement in the country (South West Aboriginal Land & Sea Council, 2015). With relevance in particular to wellness tourism, there has been some potential to offer unique Indigenous products and experiences (Pforr et al., 2016; Voigt et al., 2010).

4 COVID-19: IMPACTS AND RECOVERY STRATEGIES

Due to the impact of the COVID-19 pandemic on the tourism industry globally, to which the Margaret River Region is no exception, the focus of this initial report has been shifted to put emphasis on monitoring these impacts and assessing recovery options. The disruptions of the usual tourism processes were to such an extent that ‘business as usual’ monitoring would have been unfeasible.

The following sections analyse willingness to travel among intrastate tourists to the Australia’s South West tourism region, including the Margaret River Region.

4.1 Qualitative Interviews

The qualitative research comprised 18 40 to 45-minute long semi-structured interviews, 8 of which were conducted with tourists and 10 with tourism experts. The intrastate tourists represented previous visitors to Australia’s South West aged between 28 and 73 who reside in Perth and have an Australian, Asian, European or New Zealander cultural background. Meanwhile, the tourism experts were representatives of tourism businesses, tourism organisations and government agencies at a regional and state level. The qualitative interviews aimed to answer the following key questions:

- 1) What would be reasons for tourists to visit Australia’s South West (once again) after the regional travel barriers were lifted?
- 2) What would be reasons for tourists not to visit Australia’s South West despite the travel barriers having been lifted?

Based on interview findings, the motivators to travel to the region after the COVID-19 outbreak include escaping to nature, reconnecting with family and friends, discovering new places and relaxing. The core themes in escaping to nature include ‘being outdoors’, ‘fresh air’, ‘wide-open spaces’, ‘isolation’, and ‘avoiding crowds’, as quoted:

“We already know people have been pent up with COVID-19 [...]. Get out of the house, breathe some fresh air, go somewhere, do something and have a holiday.” (Tourism operator)

Regarding reconnecting with family, respondents emphasised the longing for reconnection after isolation and the importance of spending time with loved ones. Respondents are also motivated to explore and discover new places and to see and do something new to learn and expand their knowledge. Lastly, tourists stated they wish to visit ASW to relax and get away from worries and stressful environments:

“It’s different from Perth. So, you know, it’s like a place where you can relax but there’s not many people around.” (Tourist)

On the other hand, respondents found low perceived safety, restrictions and lack of transparent information to be major de-motivators to travel to ASW after the COVID-19 outbreak. Both tourists and tourism operators agreed that international tourists could increase the risk of COVID-19 outbreaks. As expected, good hygiene and cleanliness were also a focus of the discussion, particularly for female respondents. The respondents were also concerned with the risk of a second wave; however, this was not mentioned as an absolute deterrent as people can adapt behaviours to reduce risks by practising better self-hygiene and self-distancing. The interviews also found that price does not always compensate for low perceived safety. Cancellation policies can be a way to keep bookings up whilst decreasing the risk of visitors travelling sick, as stated:

“I specifically booked the accommodation we stayed in because you could free cancel it up to 2 days before arrival. [...]. However, if the accommodation policy had been free cancellation only until 1-2weeks in advance (and there were LOTS of these), there would be a much stronger motive for someone to travel even if feeling unwell, so that they don't lose their \$1000 accommodation fees.... Contaminate the venue...significantly higher risk for staff of the accommodation and other guests.” (Tourist email)

Restrictions put in place to reduce likelihood of potential COVID-19 infection were mentioned as another de-motivator for tourists to visit ASW. The implementation of restrictions, including social distancing and closure or reduced opening hours, can affect the availability of places and facilities and the number of tourists in premises, as argued by one of the respondents:

“I wonder if there are any other people out there like me who are not in a hurry to go back for under par performance compared to that received previously over 30 years of very regular visits. ... Booking into restaurants, who had to comply with social distancing rules, meant people being seated outside on cold frosty winter mornings in what in a few hours would be sunny and tolerable spots.... Half of the galleries were closed.” (Tourist email)

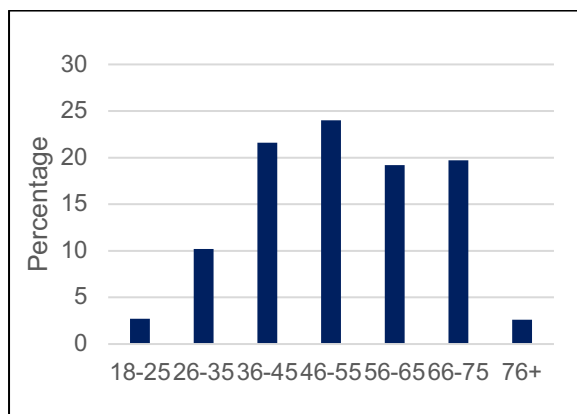
Lastly, tourists were concerned about how their visitation might increase health risks for locals.

4.2 Quantitative Survey

The quantitative research employed an experimental design through an online survey sampling a total of 666 intrastate tourists who had previously visited ASW and reside outside ASW. The data was collected in collaboration with the DBCA Parks and Wildlife Service and the RAC. Most of the respondents were aged between 36 and 55 years (approximately 46%). The male to female respondent ratio was 45:55 (Figure 11). More than 60% of the participants declared to have a university degree (see Figure 12). The majority of respondents (80.5%), considered themselves healthy with no underlying health condition (Figure 13).

Figure 10.

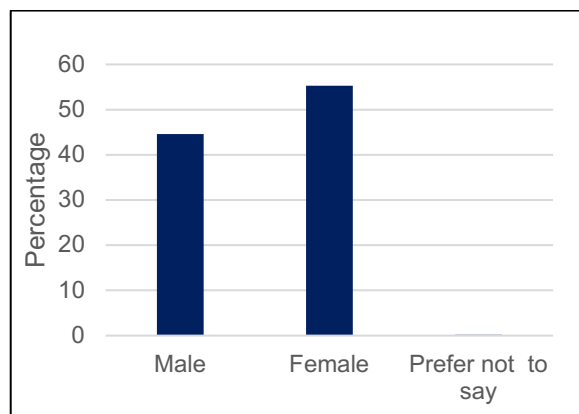
Age of Respondents



Note. Own data collection and analysis (N= 666)

Figure 11.

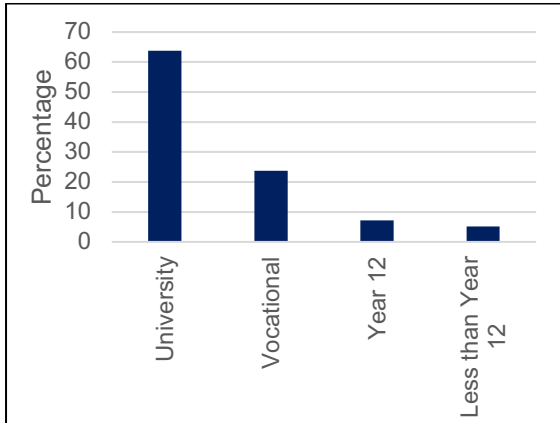
Gender of Respondents



Note. Own data collection and analysis (N= 666)

Figure 12.

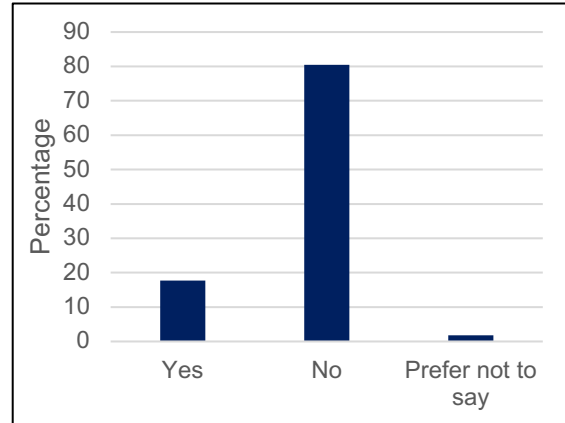
Level of Formal Education of Respondents Underlying Health Conditions



Note. Own data collection and analysis (N= 666)

Figure 13.

Underlying Health Conditions

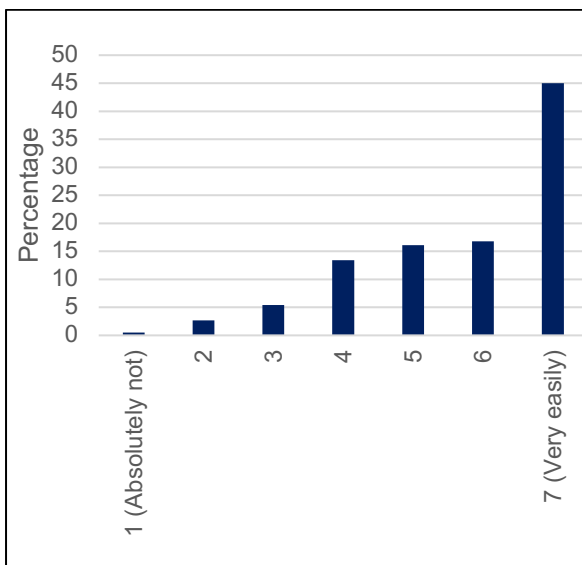


Note. Own data collection and analysis (N= 666)

The majority of surveyed respondents (45%) find it very easy to afford a holiday in Australia’s South West despite the COVID-19 pandemic (Figure 14). When visiting ASW, most survey participants stay in hotels, resorts, serviced apartments, caravan parks and campsites in National Parks (Figure 15). The over-sampling of people staying in caravan parks and camping in National Parks, and under-sampling of people staying at their own holiday homes or in a friend’s or relative’s house, is linked to how respondents were recruited.

Figure 14.

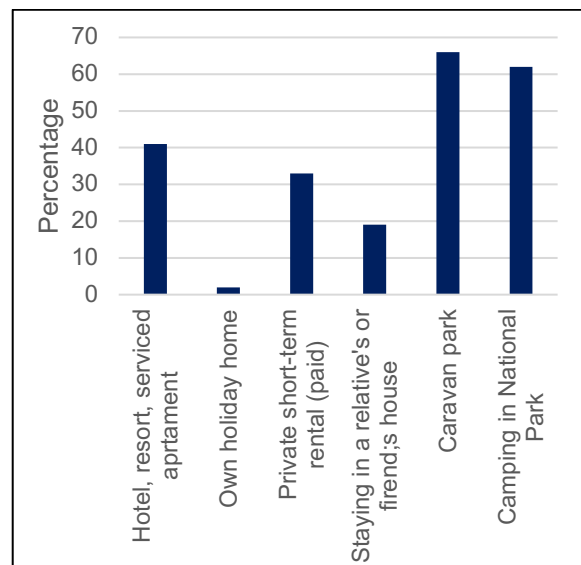
Affordability of Holidays in ASW



Note. Own data collection and analysis (N= 666)

Figure 15.

Preferred Accommodation in ASW



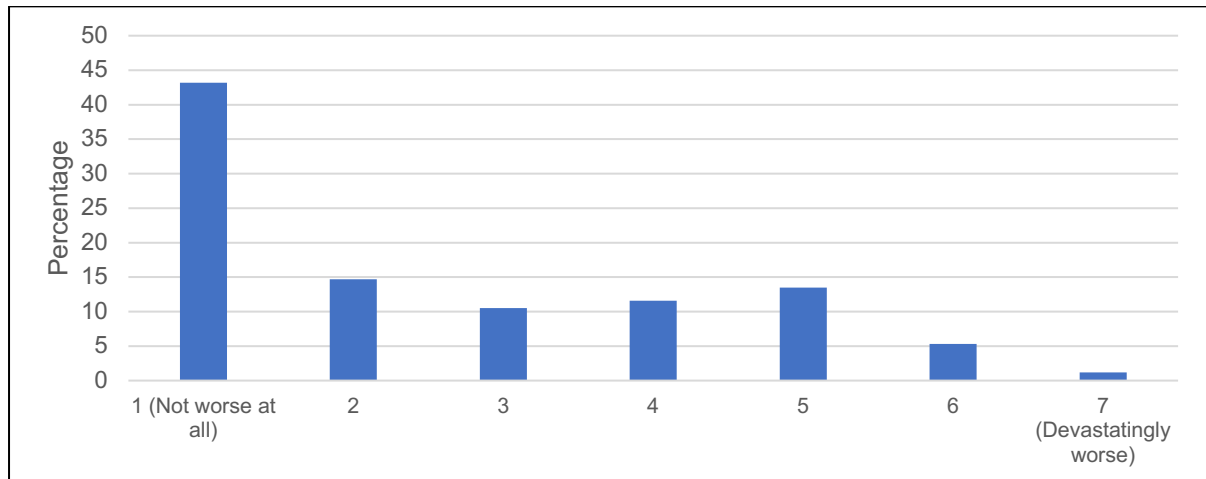
Note. Own data collection and analysis (N= 666)

4.2.1 Descriptive Analysis

Figure 16 shows that the financial situation of the majority of intrastate respondents (43.2%) was not affected by the COVID-19 pandemic.

Figure 16.

The Financial Impact of the COVID-19 Pandemic on Respondents

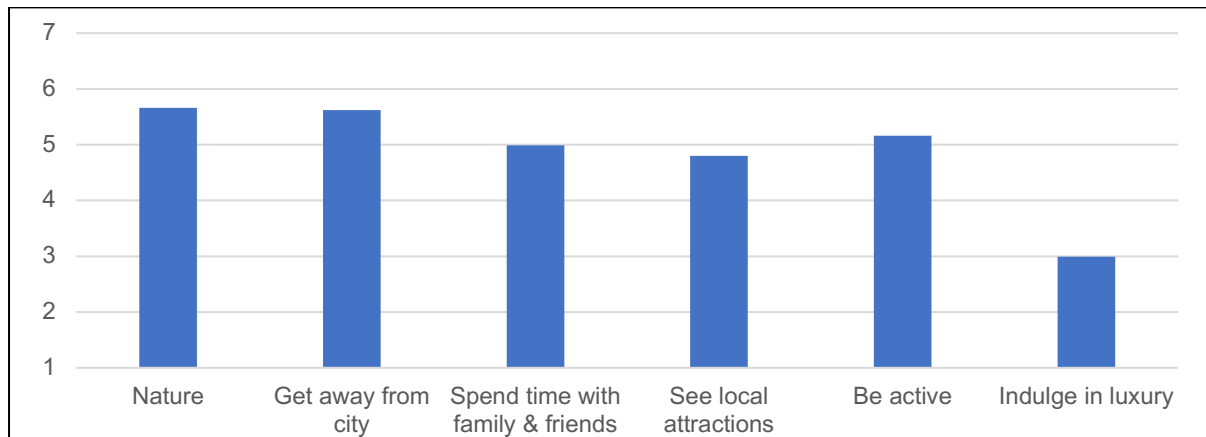


Note. Own data collection and analysis (N= 666)

Based on the survey’s findings, the most common motives for intrastate tourists to travel to the region after the COVID-19 outbreak are nature, getting away from the city and to be active (Figure 17).

Figure 17.

Motives to Visit Australia’s South West after the COVID-19 Outbreak

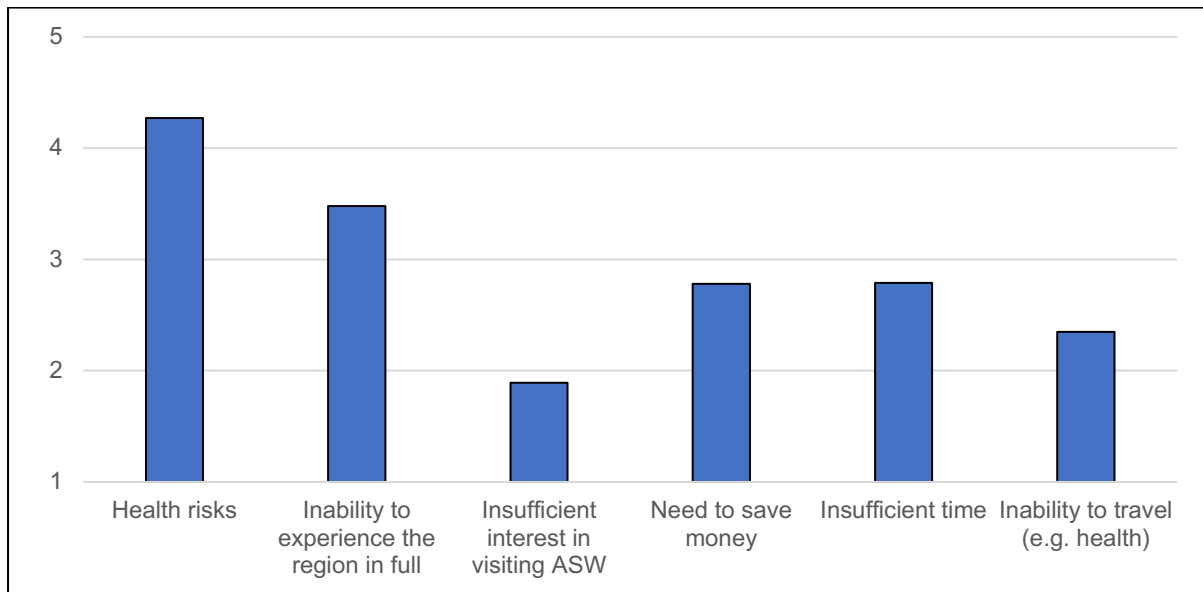


Note. The axis scale represents the level of enticement from 1 'not at all' to 7 'very much'. Own data collection and analysis (N= 666)

On the other hand, the respondents find health risks and the inability to fully experience the region due to the restrictions to be major potential de-motivators for their visit to the region (Figure 18). Note that respondents were asked to provide *potential* rather than *actual* de-motivators.

Figure 18.

Potential De-Motivators to Visit Australia's South West after the COVID-19 Outbreak



Note. The axis scale represents the level of discouragement from 1 'not at all' to 5 'very much'. Own data collection and analysis (N= 666)

4.2.2 Scenario-Based Recovery Marketing Experiment

We presented WA residents who do not reside in ASW with several scenarios combining varying sets of health and safety measures and recovery strategies that could be implemented. Based on the respective hypothetical combination of situational variables and marketing measures, we asked intrastate respondents about their willingness to book an overnight stay in the ASW region after the COVID-19 outbreak. Each scenario covers a number of binary variables as detailed below with the two options within the same variable separated by backslashes (see Figure 19).

Figure 19.

Scenarios Used in the Recovery Marketing Experiment.

Please imagine a situation where

- {1}[the COVID-19 outbreak has been well-contained in Western Australia and **no new cases** have been reported for at least a week/there is a **second wave** of COVID-19 cases in Western Australia with over 100 new cases last week]. → 2nd wave
- people from Perth are allowed to travel into the Southwest {2}[but **international visitors** are still **not permitted**/and the region has also been **opened to international visitors** last week]. → Inter.visitors
- the whole of Western Australia {3}[has **no social distancing rules**, so all attractions and beaches are **open as usual with no restriction** on numbers/has **social distancing rules in place**, which means some attractions or beaches are **closed or access is limited to restrict numbers**]. → Social.dist

Under these circumstances some people might argue travelling is {4}[still something **worth considering**/important to maintain **mental and physical wellbeing**]. → wellbeing

Visit us in Australia’s South West!

We hope to welcome you to the Southwest of Western Australia. Our facilities are returning to normal. You will be pleased to find, in general, that accommodation and attractions are charging {5}[on average **only 10% more** despite substantially increased costs/on average **30% less**]. → cheaper

Our accommodation providers have also agreed to {6}[request the equivalent of one night as a **non-refundable deposit**/introduce special cancellation policies which will allow you to **cancel for free** until three days before check-in]. → cancellation

In addition, our facilities {7}[**comply with health and travel advisories** on Covid-19. / have been **certified for implementing the new Tourism Hygiene Criteria**: They have appointed certified Clean Managers to oversee the properties’ practices, including

- cleanliness and hygiene practices
- daily temperature and health screening of employees
- mandatory masks for employees.] → hygiene

We {8}[remind people that an **Australian Covid-19 tracing app** is available but **not mandatory** to download /require **mandatory** download of the **Australian COVID tracing app** from all employees and guests.] → App

{9} [The South West is WA’s second most important tourism region **with many operators**./ Now is the time to love the South West and its crisis-torn tourism operators. Joining the #LoveASW movement is easy: First, decide to holiday in the Australia’s South West region. Second, capture a photo in an iconic and inspiring Australia’s South West location, framed by your hands in a heart shape. Third, share the photo on social media with the hashtag #LoveASW to **amplify your support to our region and their providers** during these difficult times. We are all in this together!] → #LoveASW

{10} [Nothing/ **Australia's South West is #everythingwelove**. We are graced with two oceans. Each creates storms that produce swell, sending waves to our beautiful bays, beaches and coastlines. These waves break daily and withstand everything. They will continue to break. Energetic, musical and powerful. And they are waiting for you. That is a promise. Australia's South West: Land of waves.

→ #everythingwelove

When you're ready, there will be no shortage of incredible adventures even beyond our waves: hidden gems to explore, epic road trips and friendly tour operators ready to welcome you. This year, and next year the best holiday will be right here in the Southwest of Western Australia. Come and create your spirit of adventure!]

{11} [Nothing/ And please remember: We are entering the new normal where **space is the new luxury!** Australia's South West is known for its wide-open spaces and is ideally placed to offer you [this precious privacy and seclusion.]

→ space

4.2.3 Findings: Bivariate Analysis

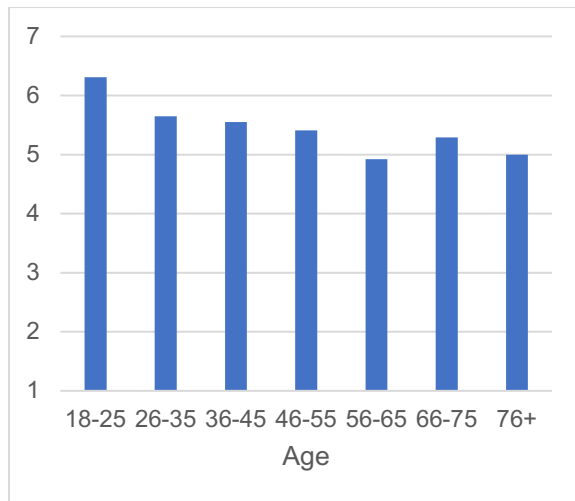
In conducting a bivariate analysis, this study sought to uncover the relationship between respondents' willingness to book a holiday in ASW, specific recovery marketing interventions and demographic variables under two particular framework conditions (with/without 2nd wave).

Figures 20 and 21 show the respondents' willingness to book a trip to ASW based on their age. Without a second wave, there are no statistically significant differences and all age groups show a similar willingness to book a visit to ASW. On the other hand, with a second wave, differences between age groups are statistically different, with younger age groups, particularly those between 18 and 25 years old, being more willing to book a visit to ASW. Elderly tourists, in particular those above 75, show the greatest reluctance to visit the region under a second wave scenario.

Figure 22 and 23 explores the relationship between the respondents' willingness to book and health of respondents. Figure 22 shows that with no second wave, tourists, with and without underlying condition, are willing to book a vacation to the region. Meanwhile, with a second wave, both respondents' groups show reluctance in booking a visit to ASW.

Figure 20.

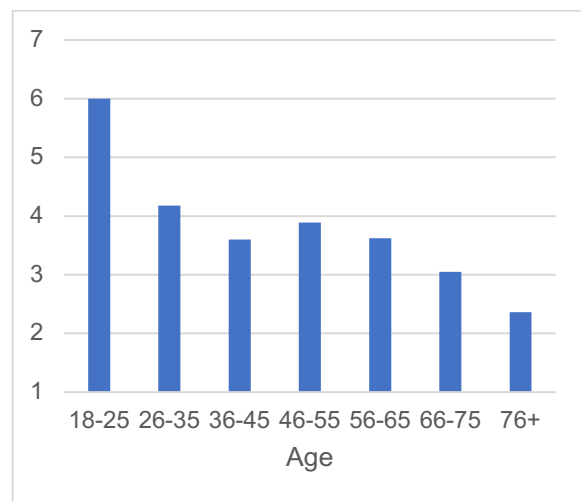
Respondents' Willingness to Book Based on Age with no Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 21.

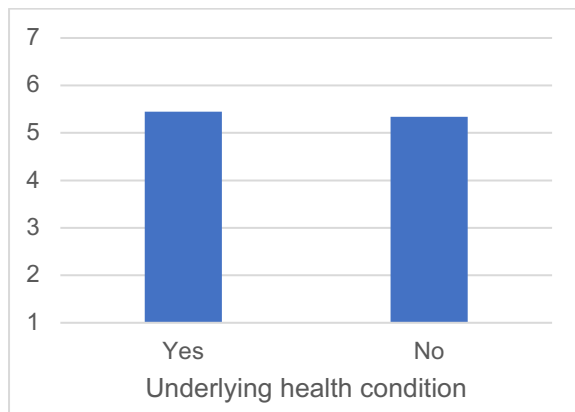
Respondents' Willingness to Book Based on Age with Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 22.

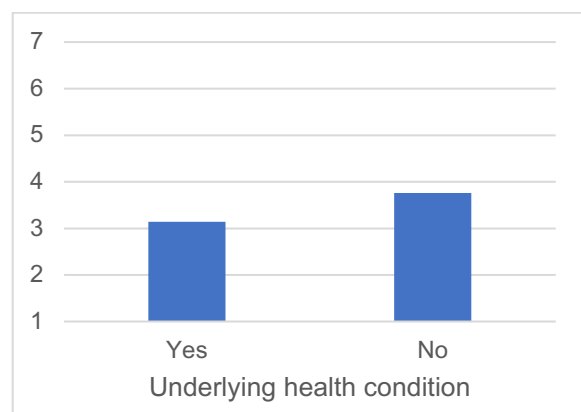
Respondents' Willingness to Book Based on Underlying Health Conditions with no Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 23.

Respondents' Willingness to Book Based on Underlying Health Conditions with Second Wave

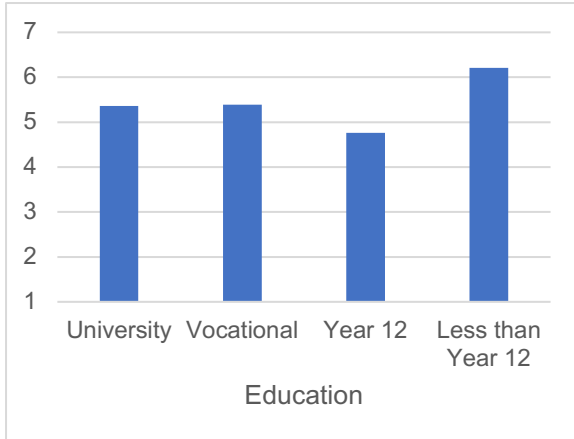


Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

As Figures 24 and 25 indicate, respondents' willingness to book a visit to ASW after the first wave of COVID-19 cases is relatively independent of their level of education. This holds for both scenarios with and without a second wave.

Figure 24.

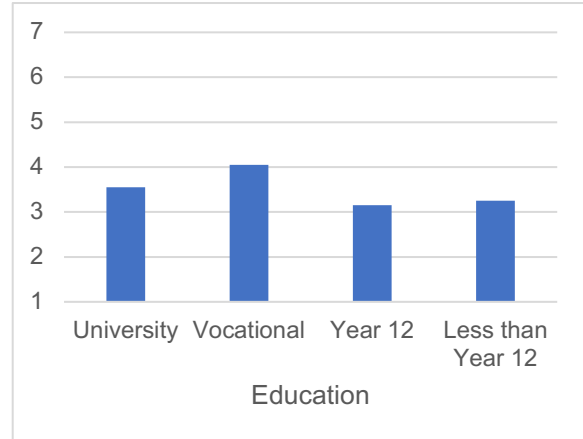
Respondents' Willingness to Book Based on Their Level of Education with no Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 25.

Respondents' Willingness to Book Based on Their Level of Education with Second Wave

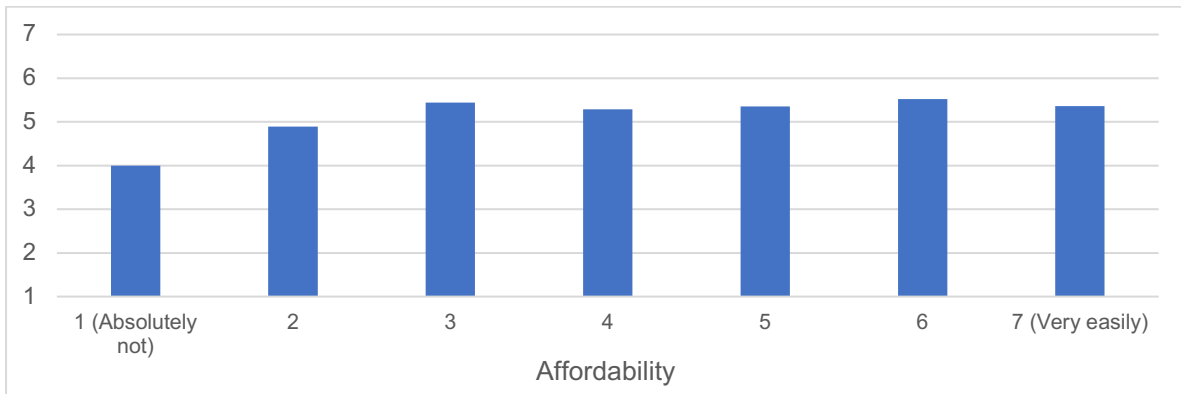


Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

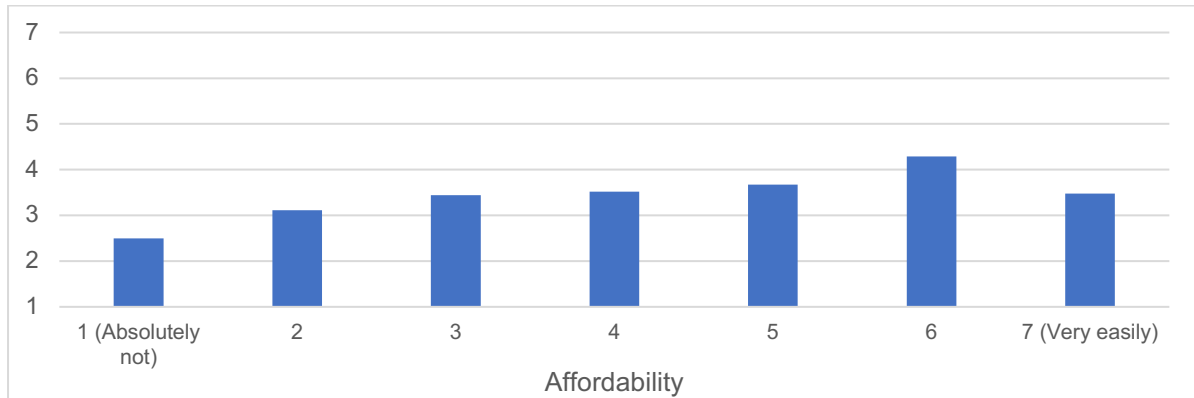
Figures 26 and 27 show respondents' willingness to book a visit to ASW after the first wave of COVID-19 cases. Respondents show similar willingness to book regardless of their ability to afford the visit. No statistically significant differences could be found in either a second wave scenario (Figure 27) or a no-second wave scenario (Figure 26).

Figure 26.

Respondents' Willingness to Book Based on Affordability with no Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 27.*Respondents' Willingness to Book Based on Affordability with the Second Wave*

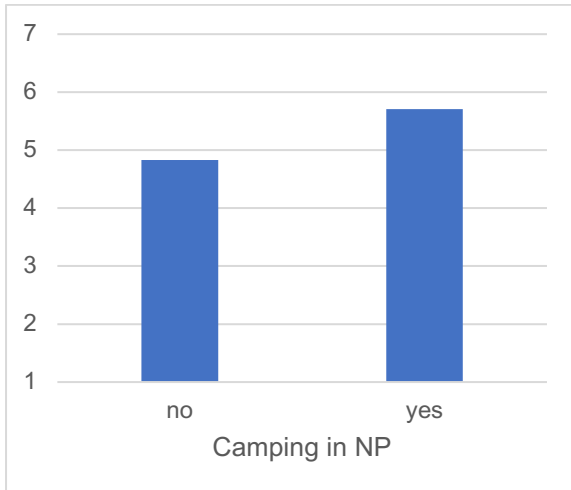
Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figures 28 to 33 compare the respondents' willingness to book a visit to the region based on their choice of accommodation, separately for the two scenarios of having or not having a second wave of COVID-19 cases. Potential visitors that would go camping in National Parks are significantly more likely to book a stay in ASW after the first wave of COVID-19 cases (regardless of whether a second wave occurs or not) than visitors staying in other types of accommodation (Figures 28 and 29).

Potential visitors preferring to stay in Airbnbs or similar types of short-term rentals are also significantly more likely to book a visit to ASW after the first wave of COVID-19 cases than visitors booking other types of accommodation (Figure 30). However, this difference is not any more statistically significant with a second wave of COVID-19 cases (Figure 31).

Figure 28.

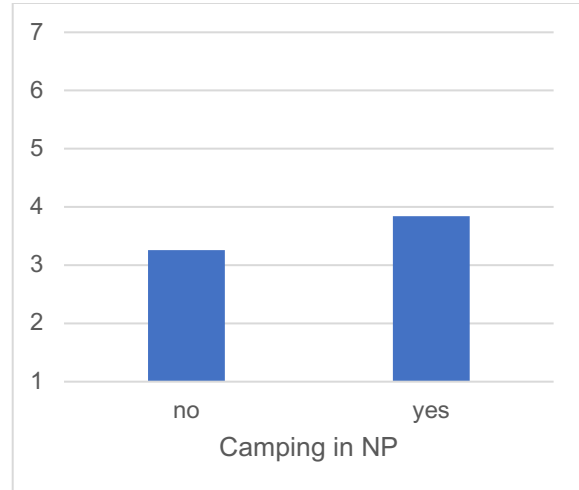
Respondents' Willingness to Book Based on the Accommodation Choice of Camping in a National Park with no Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 29.

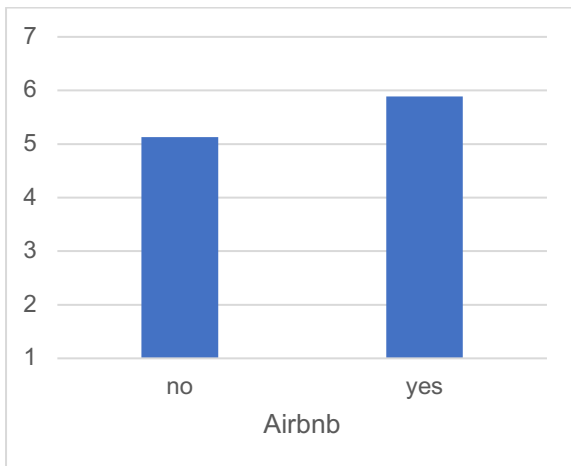
Respondents' Willingness to Book Based on the Accommodation Choice of Camping in a National Park with a Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 30.

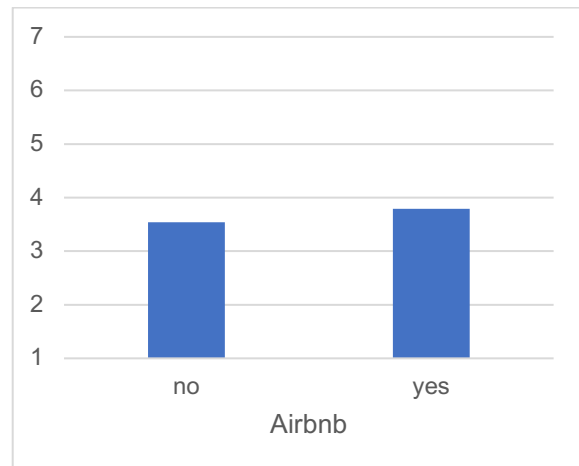
Respondents' Willingness to Book Based on the Accommodation Choice of Airbnb with no Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

Figure 31.

Respondents' Willingness to Book Based on the Accommodation Choice of Airbnb with a Second Wave



Note. The axis scale represents the level of respondents' willingness to book from 1 'very unlikely' to 7 'very likely'. Own data collection (N= 666)

As Figures 32 and 33 illustrate, staying in a hotel or serviced apartment (or not) has no statistically significant impact on visitors’ willingness to travel to ASW after the first wave or an eventual second wave of COVID-19 cases.

Figure 32.

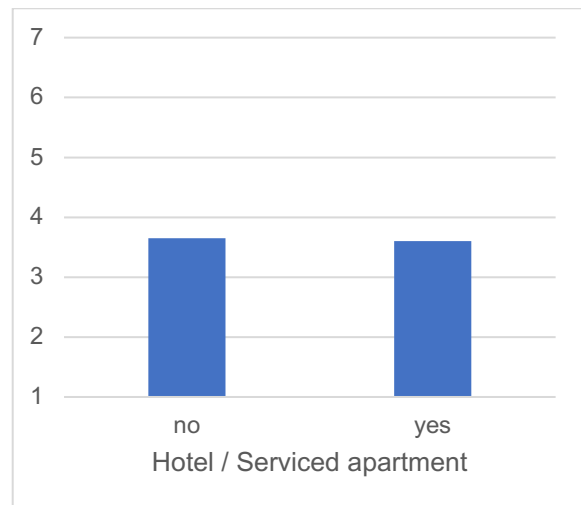
Respondents’ Willingness to Book Based on the Accommodation Choice of Hotel/serviced Apartment with no Second Wave



Note. The axis scale represents the level of respondents’ willingness to book from 1 ‘very unlikely’ to 7 ‘very likely’. Own data collection (N= 666)

Figure 33.

Respondents’ Willingness to Book Based on the Accommodation Choice of Hotel/Serviced Apartment with a Second Wave



Note. The axis scale represents the level of respondents’ willingness to book from 1 ‘very unlikely’ to 7 ‘very likely’. Own data collection (N= 666)

4.2.4 Findings: Multivariable Analysis

Table 3 shows results of the experiment applying hypothetical scenarios and presenting them to previous intrastate visitors to ASW. The respondents were shown different scenarios and were asked about whether they would book a visit to the Southwest under these scenarios during or immediately after the COVID-19 outbreak. The results indicate that the probability of booking a visit to the region in the immediate aftermath of the COVID-19 outbreak would likely increase with: (1) the implementation of social distancing (*social.dist*); (2) offering cheaper accommodation and attraction rates (*cheaper*); (3) the implementation of free-cancelation policies (*cancelation*); (4) reminding visitors that travelling has positive impacts on mental and physical wellbeing (*wellbeing*); and (5) the implementation of advertising campaigns that remind visitors of the beauty of the region (*#everythingwelove*) and/or encourage them to support

tourism providers in the ASW (*#LoveASW*). On the other hand, the occurrence of a second wave (*2nd wave*), allowing international visitors into the region (*Inter.visitors*) and the mandatory use of Australia’s COVID-tracing app “COVIDsafe” (*App*) would negatively impact the booking probability of intrastate visitors.

Note that not all effects are statistically significant as indicated by the third column in Table 3 (*p*). Those numbers which are highlighted in bold are statistically significant which means that observed effects are unlikely to be due to chance. The fourth column in Table quantifies the estimated impact on booking probability during or immediately after the COVID-19 pandemic. Note that this is an estimate that is only reasonable if the true probability of booking is between 20% and 80%. In the surveyed sample the overall booking probability was 56% on average.

Table 3.

Results from Multiple Regression Analysis (Logistic Regression)

	Estimate	p	Probability of booking
(Intercept)	-0.981	0.132	
2nd wave	-1.685	0.000	- 40%
Inter.visitors	-1.500	0.000	- 38%
social.dist	0.325	0.075	+ 8%
wellbeing	0.190	0.299	+ 5%
cheaper	0.405	0.029	+ 10%
cancellation	0.504	0.006	+ 13%
hygiene	0.000	0.998	+/- 0%
App	-0.451	0.015	- 11%
#LoveASW	0.314	0.087	+ 8%
#everythingwelove	0.377	0.039	+ 9%
space	0.036	0.841	+ 1%
control (no COVID)	0.306	0.001	

Note. “Probability of booking” is an approximation which is acceptably accurate as long as the probability of booking is between 20% and 80%.

Results (details not shown in Table 3) also indicate that having vs not having downloaded the COVIDSafe app and considering camping as an accommodation option when visiting ASW as well as gender and age have statistically significant effects on the willingness to book a stay in ASW during or immediately after the COVID-19 pandemic. Having downloaded the COVIDSafe App increases the probability of booking by approximately 10% (as noted above, these approximations only hold if the probability of booking is between 20% and 80%). Considering camping

as an accommodation option when visiting ASW increases the probability of booking by approximately 16%, being female decreases the same probability by approximately 15% and being older decreases the probability of booking by 4% per step in age category (18-25; 26-35; 36-45; 46-55; 56-65; 66-75; 76+). In other words, people aged 76+ are 24% less likely to book a stay in ASW during or immediately after the pandemic compared to Western Australians aged between 18 and 25.

If interaction effects are taken into account (details not shown in Table 3), regression results highlight that the effect of making the Australia-wide COVID-tracing app “COVIDSafe” mandatory depends on whether respondents have already downloaded the COVIDSafe app or not: If they already have the app, probability of booking is unaffected; however, probability of booking is strongly decreased for those who do not have the app yet (- 36%). Similarly, the effectiveness of hygiene measures depends on gender: hygiene measures increase the probability of booking for women (+ 24%), whereas the effect on men is negligible or even slightly negative. No statistically significant interactions regarding the second wave were observed. This means that the data is consistent with the effectiveness of the measures being the same regardless of whether there is a second wave or not.

4.2.5 Conclusion and recommendations

Noting that data have been collected at a particular point in time (July/August 2020), the following conclusions and recommendations can be drawn with respect to booking intentions of intrastate tourists to ASW in the immediate aftermath of the COVID-19 outbreak:

- There is a strong negative effect on visitation depending on the occurrence of a second wave and the intake of international tourists.
- The negative effect of allowing international tourists can potentially be countered by a combination of other measures.
- No other single measure has a similarly strong effect as the occurrence of a second wave of COVID-19 cases or opening of borders to international tourists. Discounts (vs price increases) and cancellation policies seem to have a slightly stronger effect than some of the other measures, but advertising (dreaming-inducing, solidarity-invoking) and social distancing measures are relevant too.

- Apply caution when considering mandatory use of the Australia-wide COVIDSafe App (those who have it do not care, but those who do not have it seem to strongly dislike such a measure). However, please note that the data has been collected after the initial Australia-wide roll-out of the initial tracing software. Sentiment towards different apps that limit themselves to providing an online contact registry for patrons attending premises (such as SafeWA) may be different and data on this sentiment has not been collected.
- No negative effect was perceived for compulsory social distancing measures.
- Hygiene measures do not appear to be powerful with men, but work well with women.
- Women, elderly travellers and non-campers are more cautious and, vice-versa, men, younger travellers and campers are the first movers.
- Combining dream-based and solidarity-orientated advertising appears to be effective in motivating intrastate tourists to book.

5 KEY SUSTAINABILITY AREAS

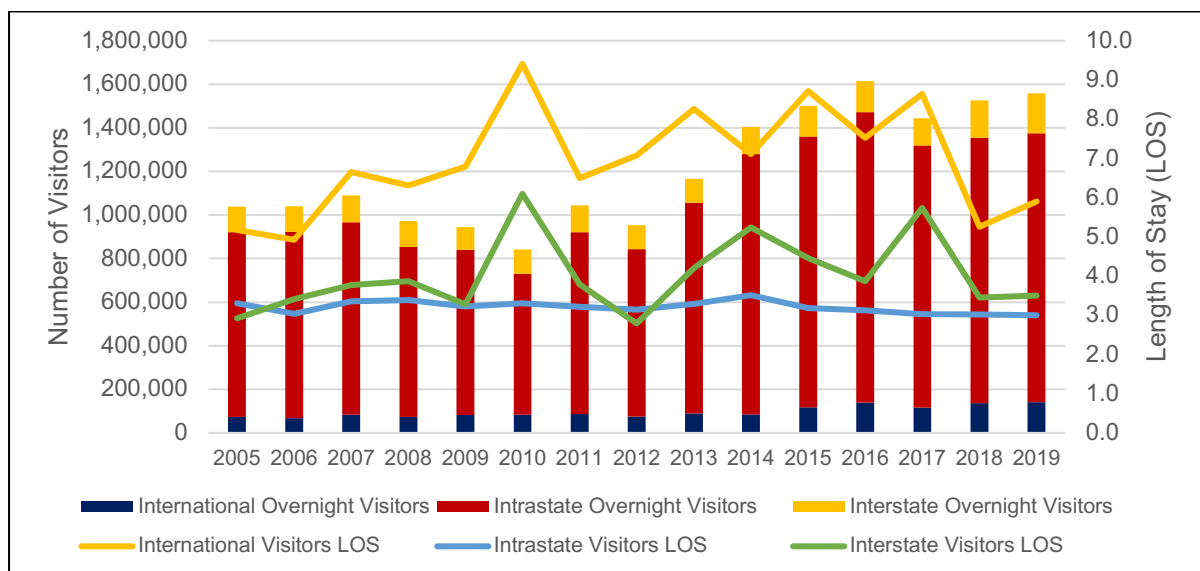
5.1 Tourism Seasonality

5.1.1 Visitation Overview

The Margaret River Region represents less than 1% of Western Australia's territory and 2% of the state's population. Despite its relatively small size compared to the state overall, the region accounted for approximately 8% of Western Australia's 68.7 million visitors nights and accommodated 1.5 million annual overnight visitors for the five years from 2014 to 2019 (Figure 34). Overnight visitation to the Margaret River Region grew by 5.1% per annum over the last decade (2009-2019).

Figure 34.

Overnight Visitation Trend to the Margaret River Region



Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. A change in the methodology of the National Visitor Survey has resulted in a break-in time series from 2014 onwards. Based on the TRA – IVS and NVS 2005-2019, in collaboration with Tourism WA (2020a). Own illustration.

Based on the above figure, the overnight visitation trends can be summarised as follows:

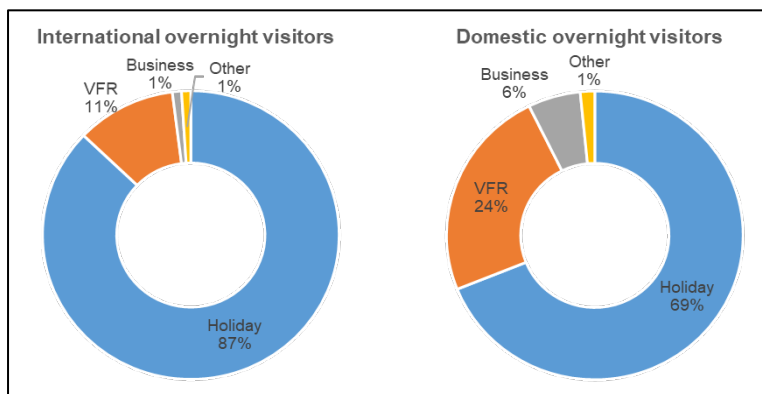
- Comprising 79% of all overnight visitors, intrastate tourists are the dominant market segment, reaching 1.23 million tourists in 2019 with 5.0% annual growth for the last decade;

- with a total of 141,000 visitations in 2019, international tourists form the smallest segment, but it is also the one that showed the highest annual growth of 10.7% for the last five years;
- with an annual growth rate of approximately 8% between 2014 and 2019, 184,000 interstate overnight tourists visited the region in 2019; and
- compared to domestic tourists with an average length of stay of 3 to 4 nights, international tourists stayed for an average of 7 nights for the past decade.

International visitors account for 9% of total overnight visitation, and 16.3% of all visitor nights, with key markets including the UK, Singapore, Malaysia, USA, New Zealand, Germany, and China. Targeting the high-value Asian markets has been a key focus of the region’s growth strategy (Volgger et al., 2018).

Figure 35.

Purpose of Visitation to the Margaret River Region



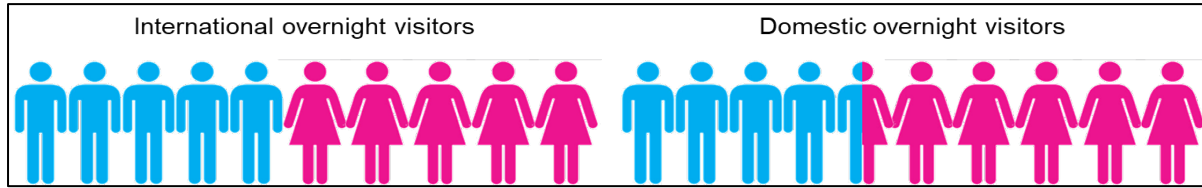
Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. Based on the TRA – IVS and NVS 2017-2019, in collaboration with Tourism WA (2020c). Own illustration.

87% of international overnight tourists and 69% of the domestic overnight tourists visit the region for holiday purposes, while 11% (international) and 24% (domestic) visit family and friends. Another 1% (international) and 6% (domestic) visit for business purposes (see Figure 35).

While 51% of the international overnight visitors of the Margaret River Region are male, females dominate the domestic market with a share of 55% (see Figure 36).

Figure 36.

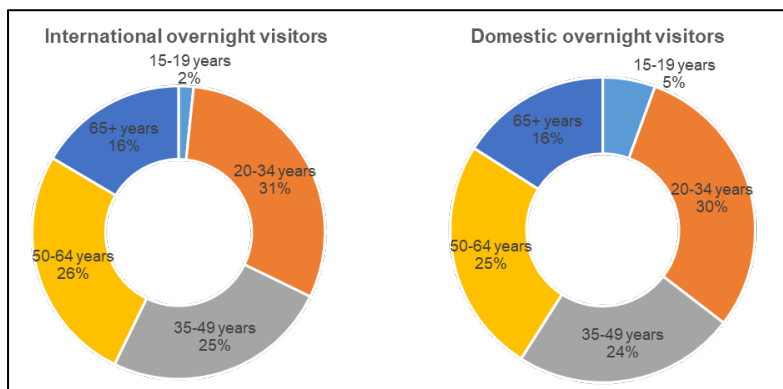
Gender of the Visitors to the Margaret River Region



Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. Based on the TRA – IVS and NVS 2017-2019, in collaboration with Tourism WA (2020c). Own illustration.

Figure 37.

Age Groups of the Visitors to the Margaret River Region

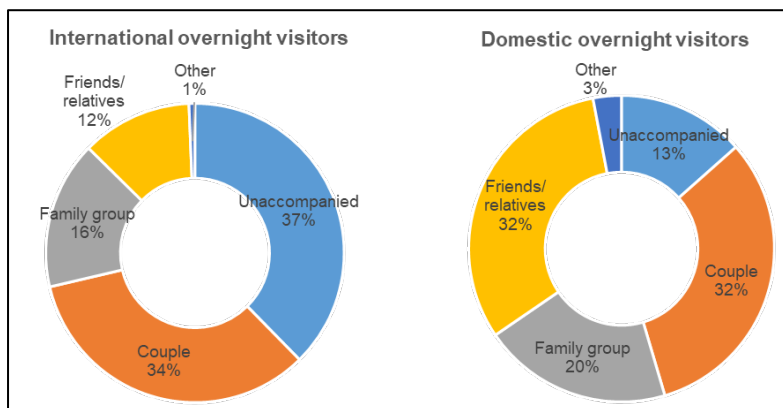


Visitation is diversified across the various age groups with visitors aged between 20-34 being slightly more dominant and accounting for at least 30% of both international and domestic markets (Figure 37).

Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. Based on the TRA – IVS and NVS 2017-2019, in collaboration with Tourism WA (2020c). Own illustration.

Figure 38.

Travel Party of the Visitors to the Margaret River Region



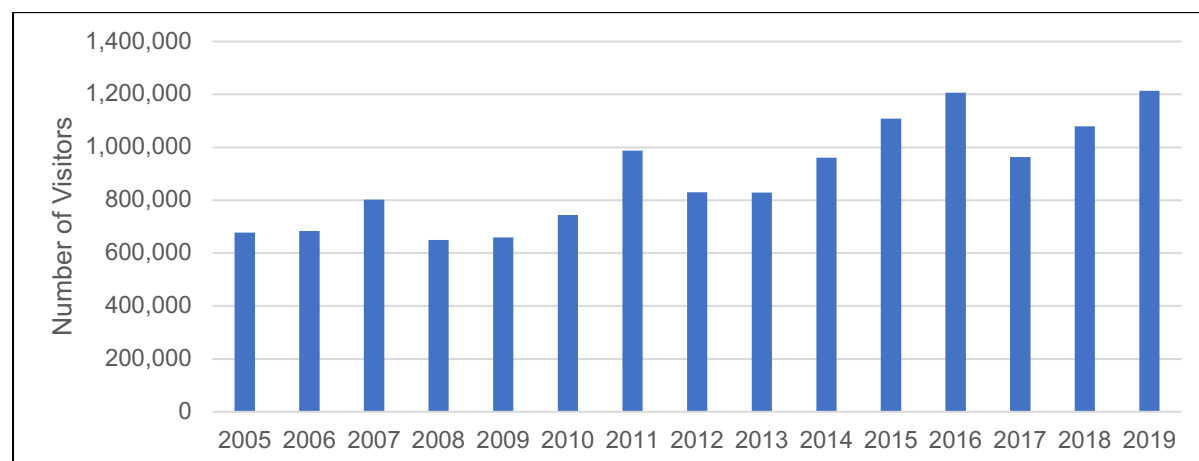
Regarding travel parties, unaccompanied travellers (37%) and couples (34%) are predominant on the international market. Couples (32%), groups of friends (32%) and family groups (20%) dominate on the domestic market (Figure 38).

Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. Based on the TRA – IVS and NVS 2017-2019, in collaboration with Tourism WA (2020c). Own illustration.

Daytrip visitation has contributed an average of 42% of the total visitation to the Margaret River Region for the past ten years. With a 6.3% annual growth between 2009 and 2019, there were a total of 1.21 million day-trip visitors recorded in the region in 2019 (Figure 39).

Figure 39.

Daytrip Visitation to the Margaret River Region



Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. A change in the methodology of the National Visitor Survey has resulted in a break-in time series from 2014 onwards. Based on the TRA – IVS and NVS 2005-2019, in collaboration with Tourism WA (2020a). Own illustration.

Table 4 below summarises the tourist visitation trends to the Margaret River Region for the past decade (2009-2019).

Table 4.

Overview on Tourist Visitation to the Margaret River Region

Type of Visitor	Visitors 2019 (Annual Growth)	Visitor Nights 2019 (Annual Growth)	Length of Stay 2019 (Average)
International Overnight Visitors	141,000 (5.6%)	837,000 (4.2%)	5.9 (7.4) nights
Intrastate Overnight Visitors	1,234,000 (5.0%)	3,666,000 (4.1%)	3.0 (3.2) nights
Interstate Overnight Visitors	184,000 (5.9%)	635,000 (6.4%)	3.5 (4.2) nights
Total Overnight Visitors	1,559,000 (5.1%)	5,138,000 (4.4%)	3.3 (3.6) nights
Intrastate Daytrips Visitors*	1,214,000 (6.3%)	-	-
Total Visitors	2,773,000 (5.6%)	-	-

Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. Percentages refer to the average annual growth for the past decade (2009-2019). Based on the TRA – IVS and NVS 2005-2019, in collaboration with Tourism WA (2020a). Own illustration.

Figure 40.

Map of the Cape to Cape Track



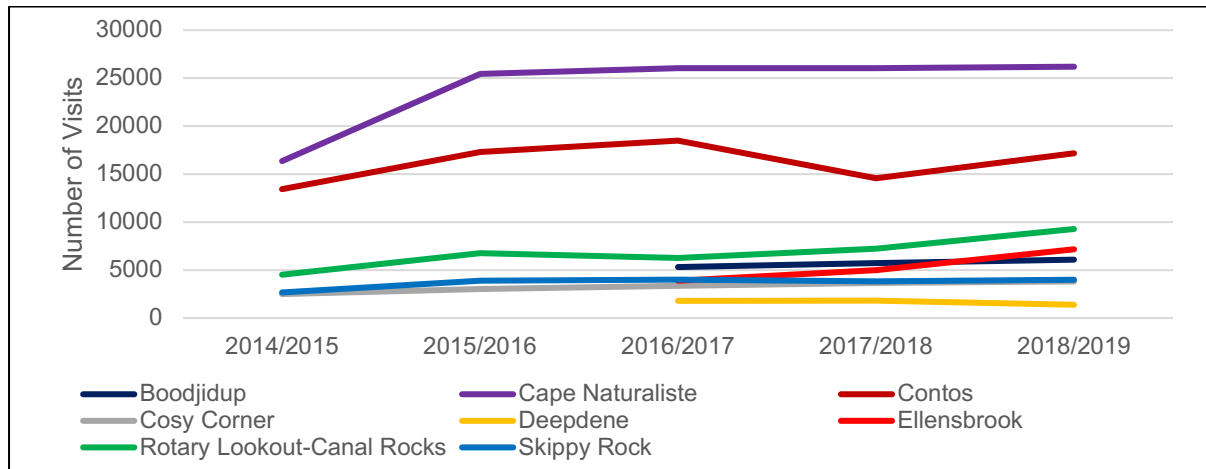
Note. Copyright of Busselton Jetty Tourist Park (2018)

The Cape to Cape Track represents the most famous walking trail in the Margaret River Region. It runs for 135 kilometres along the ridge and the beaches of the Leeuwin-Naturaliste National Park (see Figure 40). The Cape to Cape Track is managed by the Department of Biodiversity, Conservation and Attractions under the Parks and Wildlife Service.

As seen in Figure 41 below, visitation to the track is relatively stable. Cape Naturaliste Point recorded the highest visitation of 26,191 visits in 2018/2019, while Deepdene Point recorded 1,383 visits. In general, each of the monitoring locations recorded approximately 1% visitation growth per annum for the last three years (2017-2019)

Figure 41.

Cape to Cape Track Visitation at Selected Monitoring Locations at the Leeuwin-Naturaliste National Park



Note. Data represents visits/detected activities where a person passes a specific point on the track and is not intended to represent total visitation. Some of the variations in visitation/activity may be due to temporary closures and deviations due to maintenance and/or fires. Elaborated and reported by DBCA WA (2020). Own illustration.

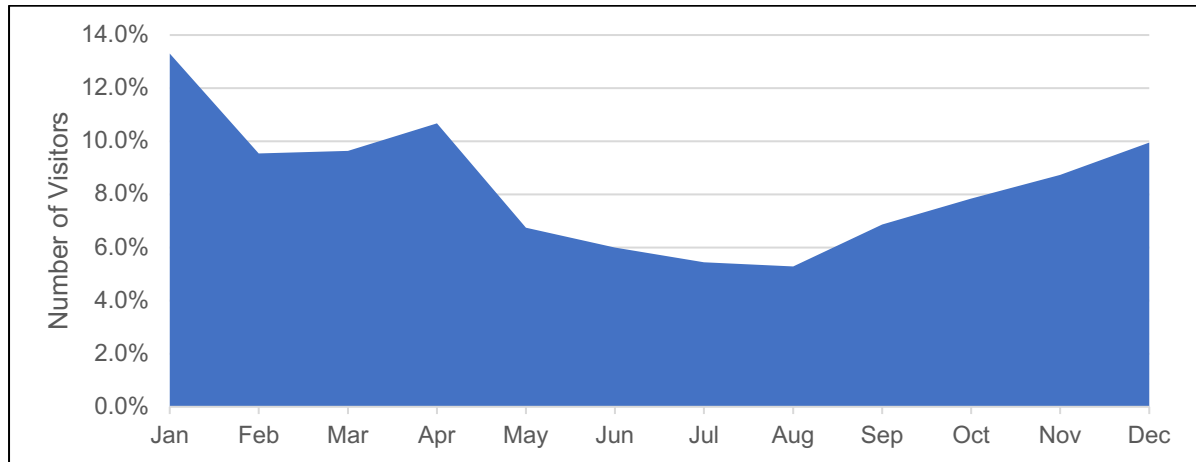
5.1.2 Seasonality Overview

The seasonality of tourist visitation translates into seasonal demand for accommodation and other tourism-related infrastructure, amenities and services. Seasonal volatility in tourist visitor numbers can be an issue for a tourism region, potentially affecting long-term viability and diversity of amenities, accommodation and attractions, employment opportunities and resident satisfaction. The visitation rate to the Margaret River Region fluctuates based on the seasons, with the peak reached in the summer months, particularly in January. Meanwhile, the off-peak season is in winter, that is between June and August. Visitation slightly increases in July during school-holidays.

Figure 42 below shows that the peak periods of visitation to the Leeuwin-Naturaliste National Park are between December and April during the summer and autumn seasons (numbers averaged for the years 2016-2019), while May to August record fewer visitors (DBCA WA, 2020).

Figure 42.

Seasonality of Visitation to the Leeuwin-Naturaliste National Park

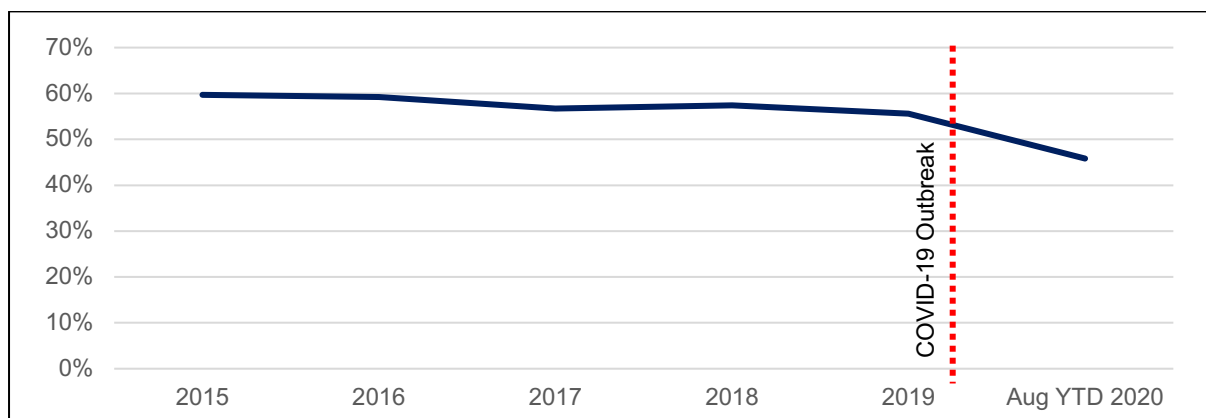


Note. Based on three-year average visitation data for 2016/2017-2018/2019, in collaboration with DBCA WA (2020). Own illustration.

Based on data from STR (2020), the occupancy rates of commercial accommodation in the Margaret River Region fell slightly from an average of 59.7% in 2015 to 55.6% in 2019. Despite a very strong performance between June and August 2020 which made up for strong declines in April and May (when most severe travel restrictions were in place), overall, the COVID-19 outbreak in 2020 resulted in a drop in occupancy rates to 45.8% for the period January to August 2020 (Figure 43).

Figure 43.

The Annual Average of Occupancy Levels Among Commercial Accommodation Providers in the Margaret River Region, 2015 – August 2020

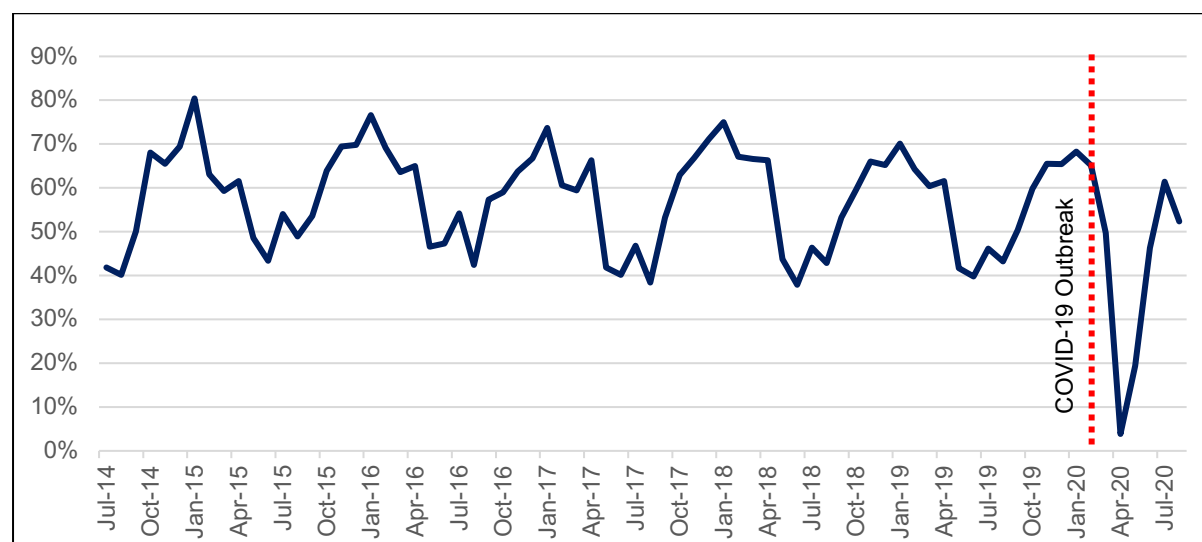


Note: The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

The occupancy rates in accommodation within the region fluctuate between 70%-80% in peak periods, such as December and January (summer and school holidays), and around 40% in off-peak periods such as June and August, at the beginning and the end of the winter season (STR, 2020; see Figure 44), except for the atypical, COVID-19 triggered winter season in 2020. A slight peak is also shown in April, aligned with the first term school holidays in Western Australia. Due to COVID-19-related restrictions (including international, interstate and intrastate travel restrictions), occupancy rates plummeted to 3.9% in April 2020 (Department of the Premier and Cabinet, 2020; STR, 2020). Figure 44 shows that the easing of restrictions in mid-May 2020, with intrastate travels permitted, led to a steep recovery of occupancy rates in the region reaching an unprecedented 61.4% in July 2020.

Figure 44.

The Monthly Average of Occupancy Levels Among Commercial Accommodation Providers in the Margaret River Region, July 2014 – August 2020



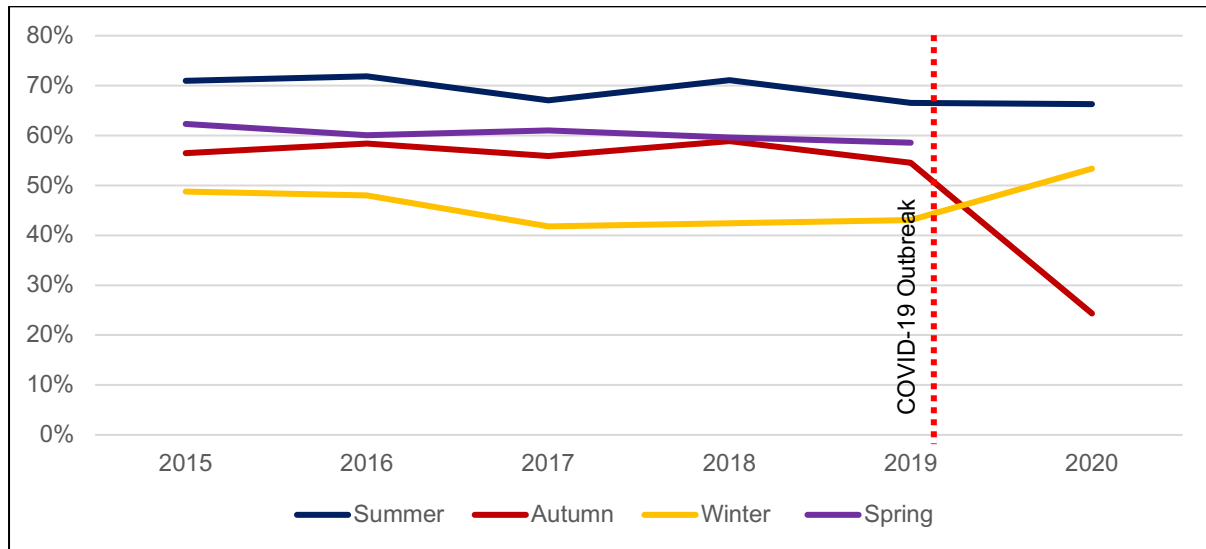
Note: The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

As discussed above, accommodation occupancy rates in the Margaret River Region fluctuate based on the seasons. Known primarily as a coastal destination and wine region, the peak of visitation is reached in the summer months, between December and February (see Figure 45). Occupancy during the summer season is approximately 1.5 times higher than during the off-peak season in winter, between June and August.

Notably, recent research has indicated that there is potential to position the region more strongly as a winter get-away for Asian markets (Volgger et al., 2018).

Figure 45.

Occupancy per Season Among Commercial Accommodation Providers in the Margaret River Region, 2015 - 2020



Note: Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August. The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

5.2 Tourism Employment

Tourism is a cross-sector industry and thus comprises the sectors listed in Table 5 entirely or in parts.

Table 5.*Tourism Industry Sectors*

Type of industry	ANZSIC code	ANZSIC industry
Accommodation	44	Accommodation
Ownership of dwellings	6711	Residential property operators
Cafes, restaurants and takeaway food services	451	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	452	Pubs, taverns and bars
	453	Clubs (hospitality)
Rail transport	47	Rail transport
Taxi transport	4623	Taxi and other road transport
Other road transport	461	Road freight transport
	4621	Interurban and rural bus transport
	4622	Urban bus transport (including tramway)
Air, water and other transport	48	Water transport
	49	Air and space transport
	50	Other transport
Motor vehicle hiring	6611	Passenger car rental and hiring
Travel agency and tour operator services	722	Travel agency and tour arrangement services
Cultural services	89	Heritage activities
	90	Creative and performing arts activities
Casinos and other gambling services	92	Gambling activities
Sports and recreation services	91	Sports and recreation activities
Automotive fuel retailing	40	Fuel retailing
	41	Food retailing
	42	Other store-based retailing
	43	Non-store retailing and retail commission-based buying and/or selling
Education and training	80	Preschool and school education
	81	Tertiary education
	82	Adult, community and other education
All other industries		All other industries

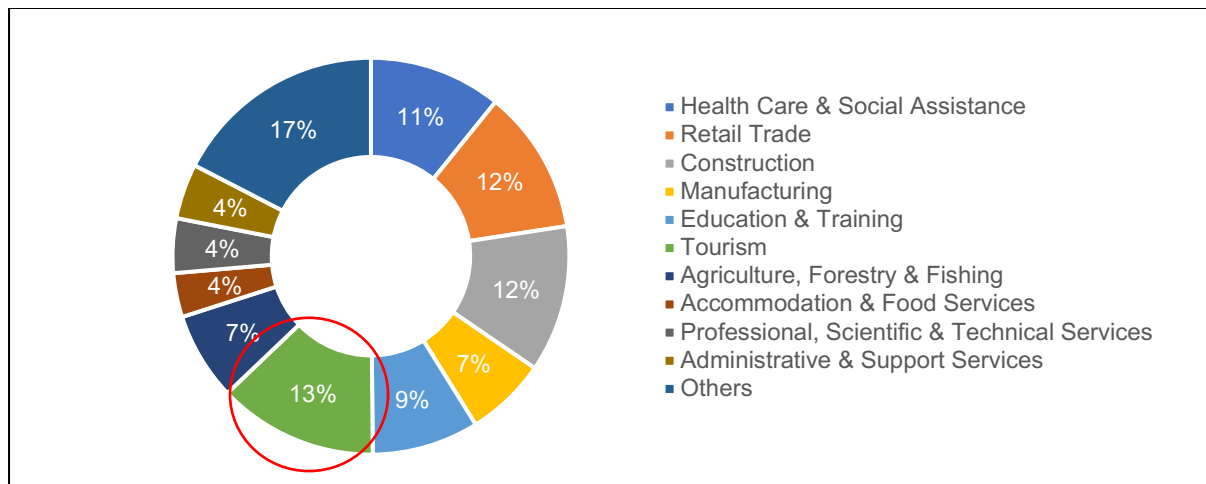
Note: Based on the Australian and New Zealand Standard Industrial Classification (ANZSIC, 2006) retrieved from the Australian Bureau of Statistics (2014).

Tourism plays a significant role in the global economy. The WTTC (2020) recorded 330 million tourism jobs in 2019 globally, an increase of over 50 million jobs compared to 2015. The UNWTO and the ILO (2014) define tourism employment as the number of jobs directly attributable to tourism demand in tourism and non-tourism industries, held by employees, self-employed and contributing family workers. In this measurement, not only the employment from within the tourism industry is taken into account, but also other sectors that are interconnected with the tourism industry.

Based on TRA (2019), there are 849 tourism enterprises in the Margaret River Region, most of them are classified as sole traders (36%) or small enterprises with less than five employees (35%). These businesses generate a total of 2,702 jobs in the form of direct employment, a 13% contribution to overall employment in the Margaret River Region (REMPPLAN, 2020b), most of which is accounted for by accommodation and food services employment (see Figure 46).

Figure 46.

Top 10 Industries in the Margaret River Region by Employment Impact



Note: The figure shows the distribution of employment of the major industries in the City of Busselton and the Shire of Augusta-Margaret River. Based on the Australian Bureau of Statistics 2016 Census of Place of Work Employment, in collaboration with REMPLAN (2020b). Tourism is a cross-sector industry and thus comprises sectors listed in Table 5 entirely or in parts (Australian Bureau of Statistics, 2013).

Employment creation has long been identified as a significant driver in government commitment to the development of the tourism sector. The tourism industry is also known as an industry with low-entry barriers which is readily accessible to those who are relatively low-skilled and with little specific training (Baum, 2002).

5.3 Destination Economic Benefits

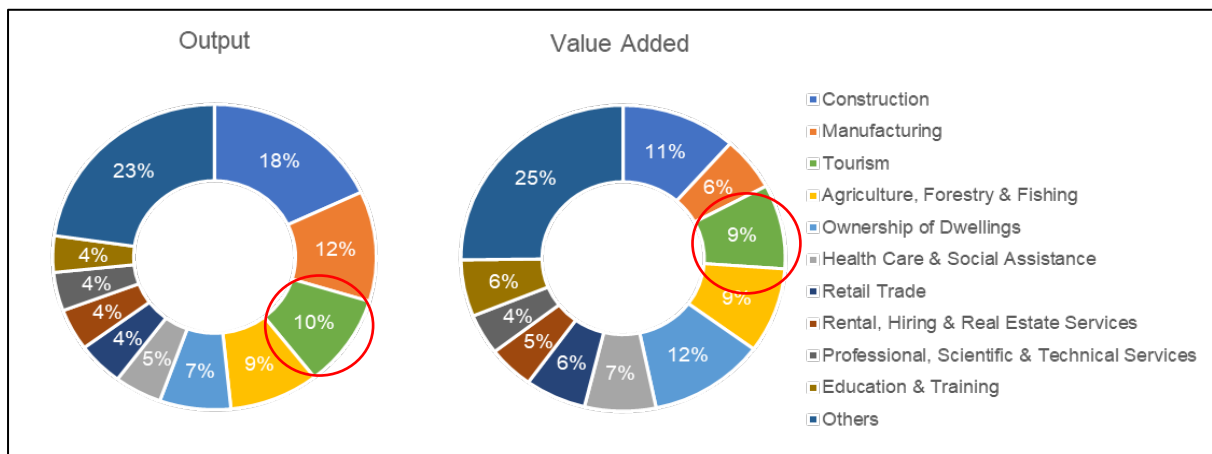
5.3.1 Tourism Economic Contribution

Without a doubt, tourism has become one of the most relevant and robust economic sectors in the world (despite occasional crises such as the one fuelled by the COVID-19 pandemic), with relatively continuous growth, expansion, and increasing diversification. The tourism industry is also among the top three economic contributors

in the Margaret River Region. In 2018, the tourism industry generated a total of \$741.9 million in output and \$317.4 million in value-added, contributing 9.7% to the regional economic output and 8.9% to the regional value-added (REMPPLAN, 2020b; see Figure 47). Accommodation and food services are the biggest contributors within the region's tourism industry.

Figure 47.

Top 10 Industries in the Margaret River Region by Economic Output and Value-Added



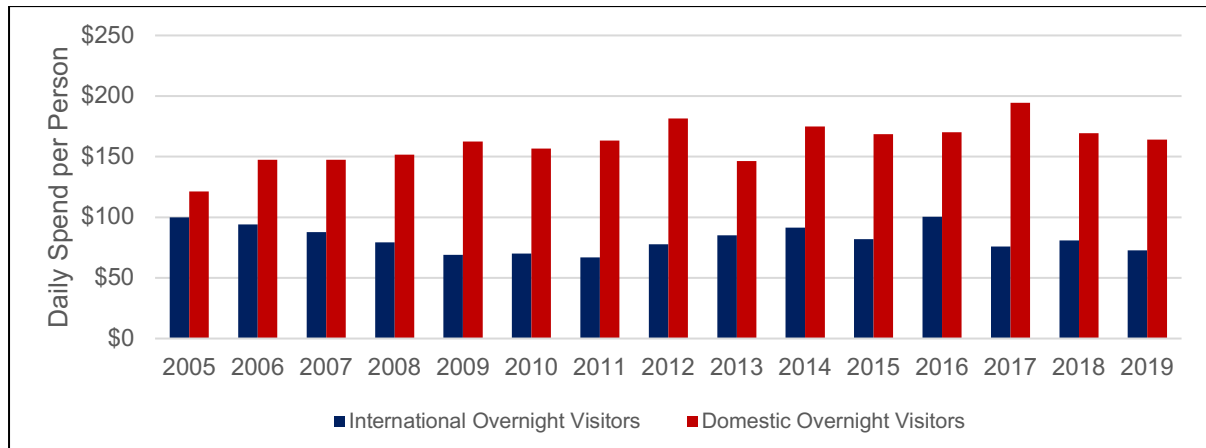
Note: The figure shows aggregated economic output data of the major industries in the City of Busselton and the Shire of Augusta-Margaret River. Based on the Australian Bureau of Statistics 2016/2017 National Input-Output Tables, in collaboration with REMPLAN (2020b). Tourism is a cross-sector industry and thus comprises sectors listed in Table 5 entirely or in parts (Australian Bureau of Statistics, 2013).

5.3.2 Tourist Spending

Figure 48 shows that domestic visitors spend more than international visitors on a daily basis (note however that they have substantially shorter lengths of stay resulting in different overall spending). Based on TRA - IVS data collated by Tourism WA (2020a), international overnight visitors to the Margaret River Region are estimated to spend an average of \$73 per night, a figure that has slightly increased by 0.6% per annum over the last decade (2009-2019). Meanwhile, domestic overnight visitors spend \$164 per person per night, a figure that has seen only 0.1% annual growth between 2009 and 2019.

Figure 48.

Nightly Spending of Overnight Visitors in the Margaret River Region

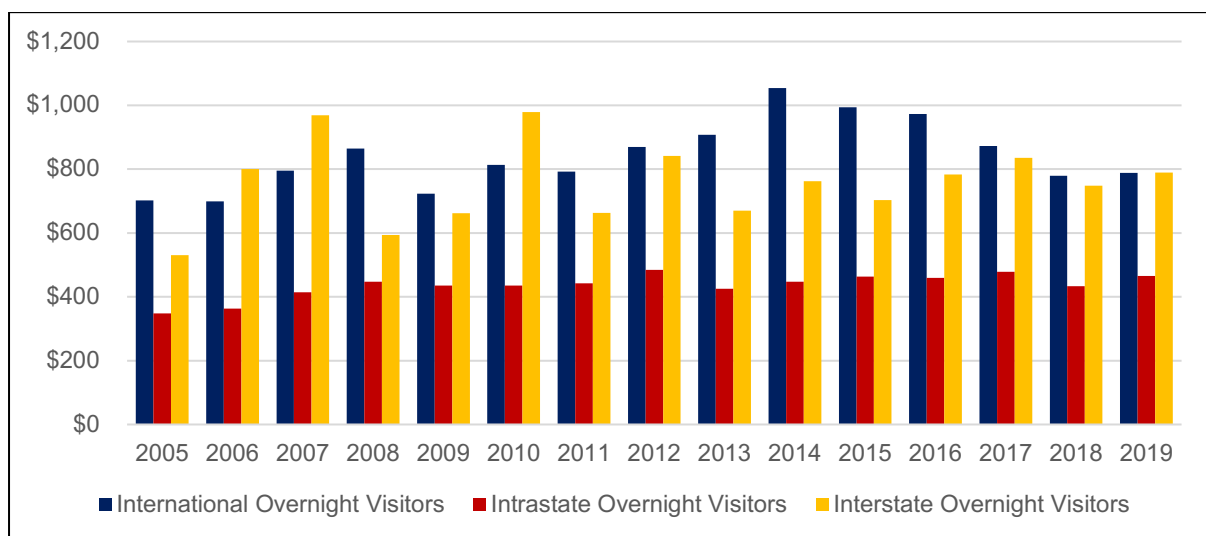


Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. It is important to note that these estimated rates of expenditure reflect averages across many types of visitors. Based on the TRA – IVS and NVS 2005-2019, in collaboration with Tourism WA (2020a). Own illustration.

In 2019, the total spending (over the entire trip) of overnight visitors was \$788 for international visitors, \$465 the intrastate visitors and \$789 for interstate visitors. (Tourism WA, 2020a; see Figure 49). Spending figures grew by approximately 1%-2% p.a. between 2009 and 2019.

Figure 49.

Total Spending of Overnight Visitors in the Margaret River Region

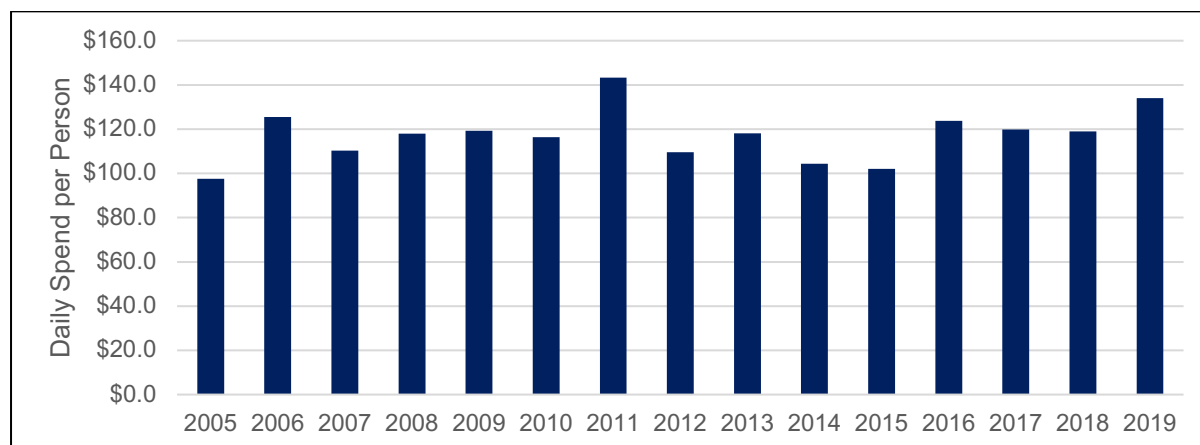


Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. It is important to note that these estimated rates of expenditure reflect averages across many types of visitors. Based on the TRA – IVS and NVS 2005-2019, in collaboration with Tourism WA (2020a). Own illustration.

In 2019 an average day trip traveller spent \$134 per trip in the region (see Figure 50). This spending amount has slightly grown by 1.2 % per annum in the period 2009-2019.

Figure 50.

Daily Spending of Day Trip Visitors in the Margaret River Region



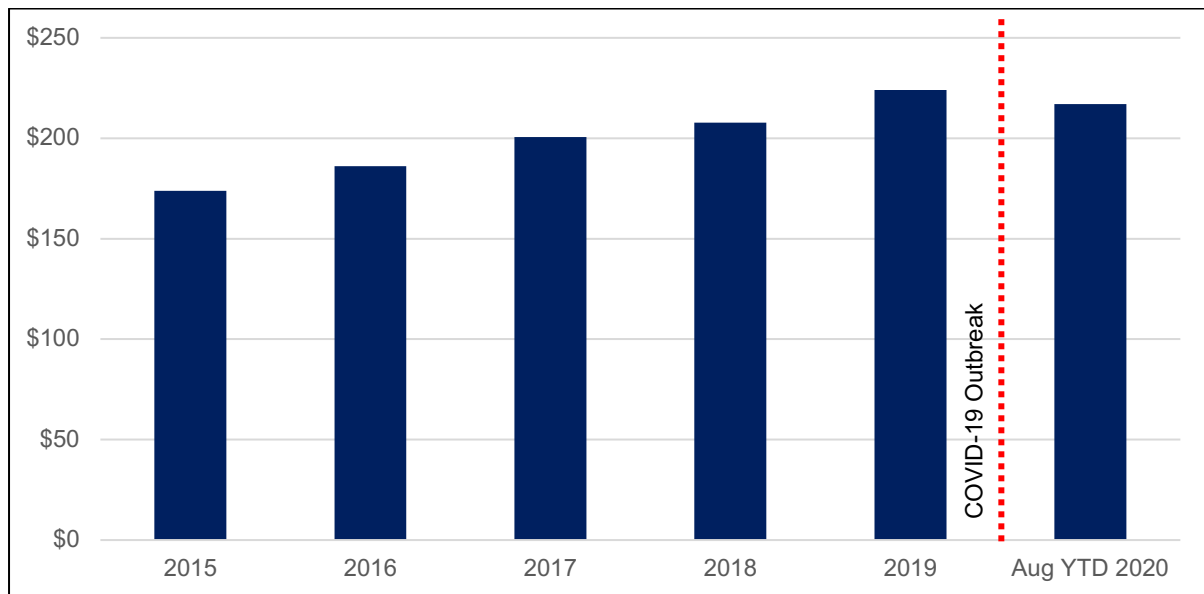
Note: The figure shows aggregated tourism data of the City of Busselton and the Shire of Augusta-Margaret River. It is important to note that these estimated rates of expenditure reflect averages across many types of visitors. Based on the TRA – IVS and NVS 2005-2019, in collaboration with Tourism WA (2020a). Own illustration.

5.3.3 Average Daily Rate (ADR)

On average, the daily room rate in commercial accommodations in the Margaret River Region amounted to \$224 in 2019, with 6.4% p.a. growth between 2016 and 2019 (see Figure 51). The average daily rates for the year 2020 (until August) amounted to \$217, a decrease of only 3.2% compared to the average value in 2019, despite the impacts of the COVID-19 pandemic.

Figure 51.

The Annual Average of Daily Rates among Commercial Accommodation Providers in the Margaret River Region, 2015 – August 2020

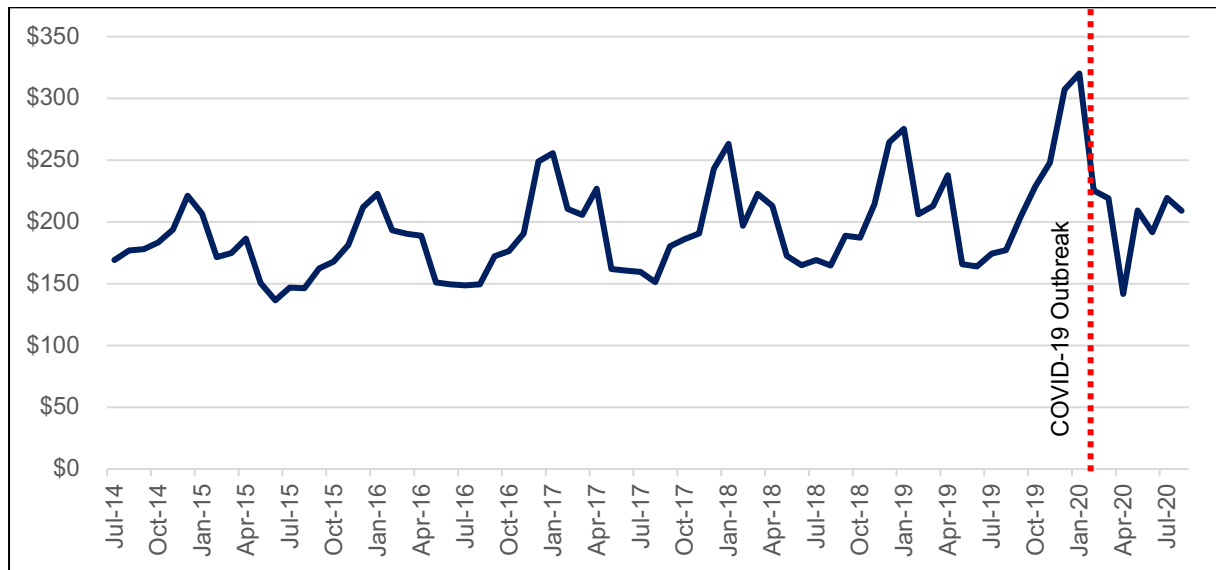


Note: The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

Monthly daily room rates mirror the seasonal fluctuations of occupancy rates, with the highest ADR above \$250 (since 2018) occurring during December to January, followed by a second peak around the Easter school holidays usually in April with an ADR well above \$200 (since 2018, see Figure 52). The lowest ADR around \$150 to \$165 is regularly recorded in July and August. The COVID-19 pandemic has altered the ADR dynamics in 2020, with rates plummeting in April 2020 (i.e., the period with the most severe travel restrictions) and trending higher than usual in the following winter months, in line with the sharp increase in occupancy.

Figure 52.

The Monthly Average of Daily Room Rates among Commercial Accommodation Providers in the Margaret River Region, July 2014 – August 2020

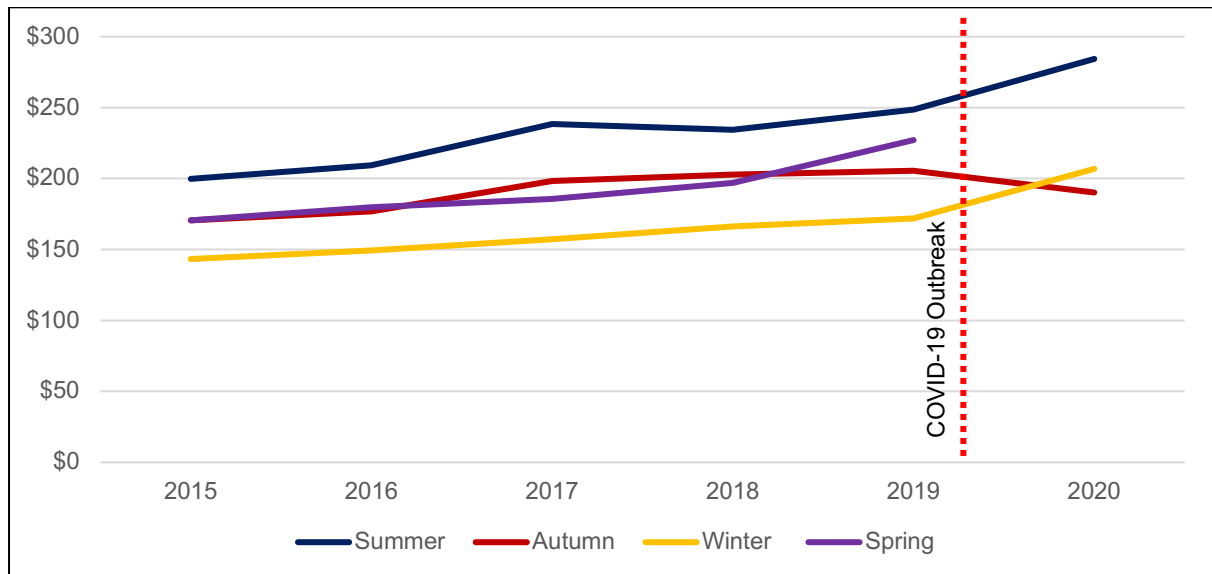


Note: The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

The majority of commercial accommodation providers in the region adapt their rates to demand, with higher rates held during the peak seasons and lower rates applied in the low seasons. This is reflected in the fluctuation of daily room rates based on the season (Figure 53). The highest ADRs of above \$200 (if not \$250 or higher, since 2019) are regularly applied during the summer season, approximately 1.4 times higher than the rates during the off-peak season in winter. The daily rates in the autumn and spring seasons show comparable patterns and range around \$200. Autumn and winter rates in the COVID-affected year 2020 differed markedly from previous years.

Figure 53.

The Seasonal Average of Daily Room Rates among Commercial Accommodation Providers in the Margaret River Region, 2015 – 2020



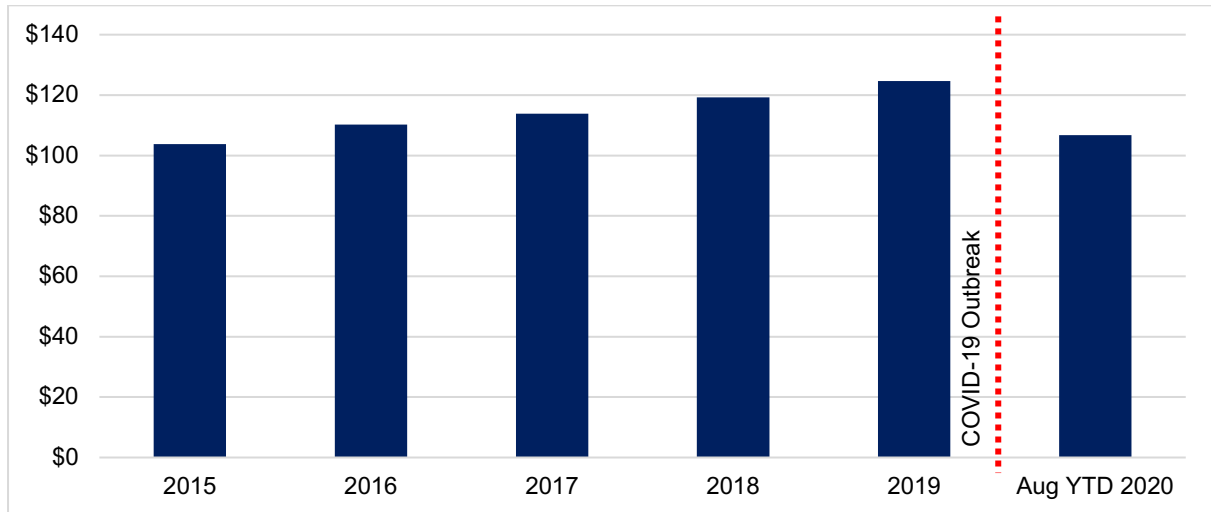
Note: Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August. The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

5.3.4 Revenue per Available Room (RevPAR)

Between 2015 and 2019, the revenue per available room (RevPAR) among commercial accommodations in the Margaret River Region grew by 4.7% p.a. reaching \$125 (see Figure 54). The COVID-19 outbreak resulted in a 14% decline in RevPAR for the months of January to August 2020 (RevPAR of \$107) compared to the average of the previous year.

Figure 54.

The Annual Average of Revenue per Available Room (RevPAR) among Commercial Accommodation Providers in the Margaret River Region, 2015 – August 2020

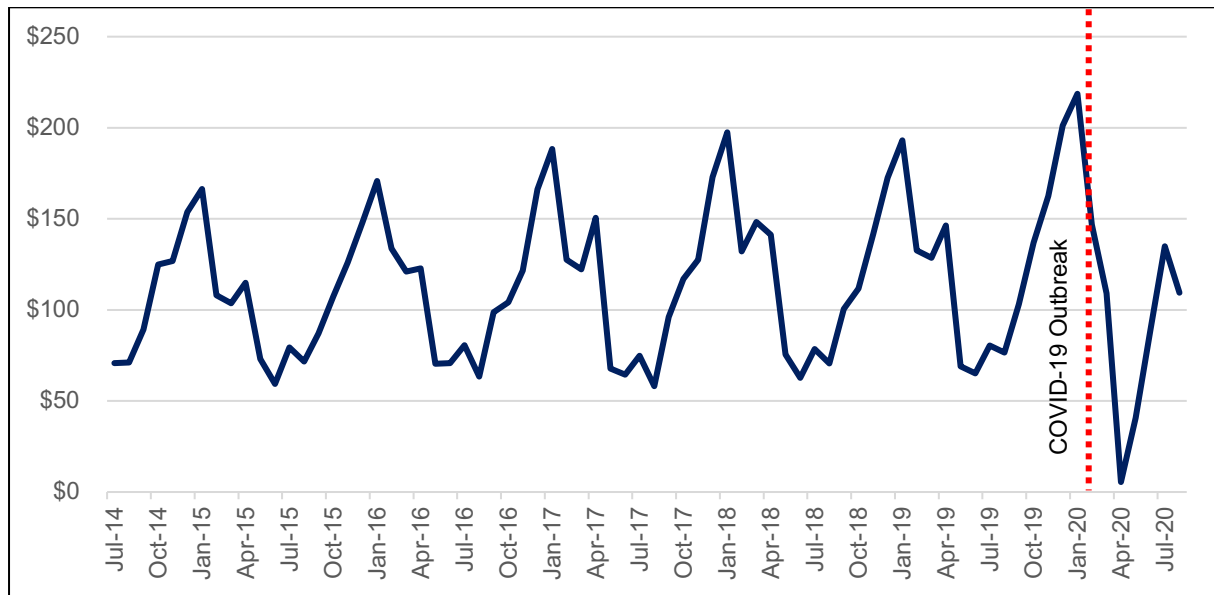


Note: The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

Monthly RevPAR in the Margaret River Region traditionally mirrors the seasonal trends in daily room rates, fluctuating between close to \$200 in January and \$60 to \$75 in June and August (see Figure 55). The COVID-19 pandemic caused the RevPAR to nosedive to \$5 as of April 2020, before it climbed back to above \$100 in July-August 2020, which is substantially higher than in previous July and August months.

Figure 55.

The Monthly Average of Revenue per Available Room (RevPAR) among Commercial Accommodation Providers in the Margaret River Region, July 2014 – August 2020

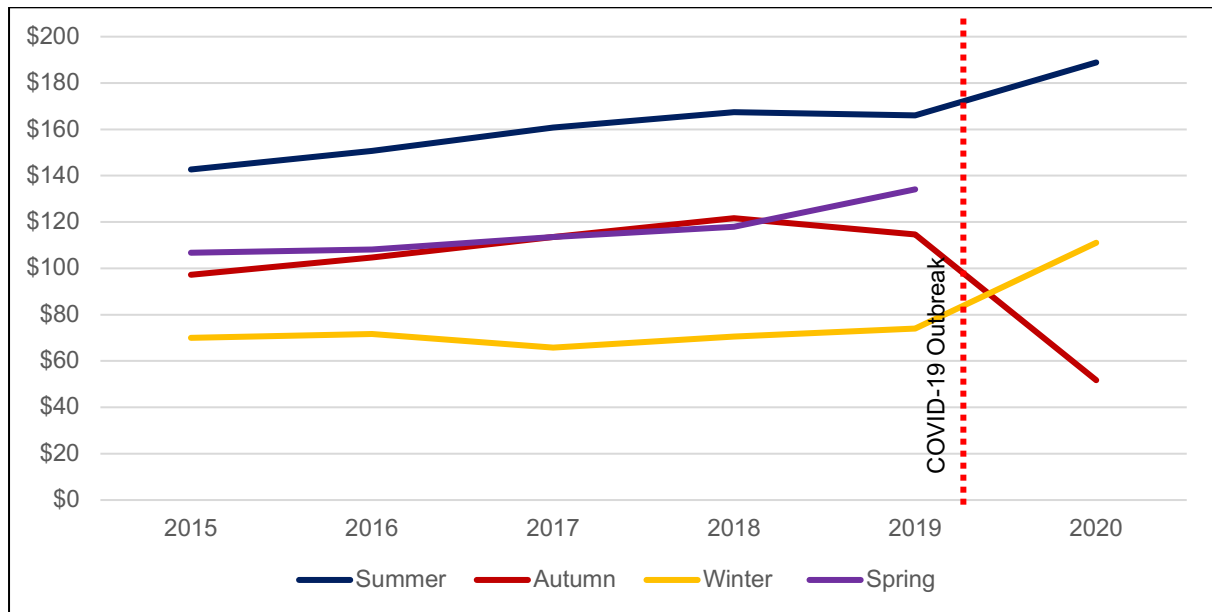


Note: The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

The seasonal pattern of RevPAR (2015-2020) shows similarities with occupancy rates and daily room rates. The highest RevPAR of \$143 to \$189 is achieved during the summer season, which is 2.2 times higher than the RevPAR during the off-peak season in winter (see Figure 56). RevPAR in the autumn and spring seasons amount to similar values of approximately \$115 to \$120 (in most years). The RevPAR in the Margaret River Region has been showing increasing trends across all season, except for autumn (even before the Covid-19 outbreak) (STR, 2020).

Figure 56.

The Seasonal Average of Revenue per Available Room (RevPAR) among Commercial Accommodation Providers in the Margaret River Region, 2015 – 2020



Note: Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August. The figure is based on a sample of commercial accommodation providers in the City of Busselton and the Shire of Augusta-Margaret River. Based on the STR (2020) – Trend Report of Margaret River, Western Australia. Own analysis and illustration.

5.4 Use of Private Accommodation Platforms

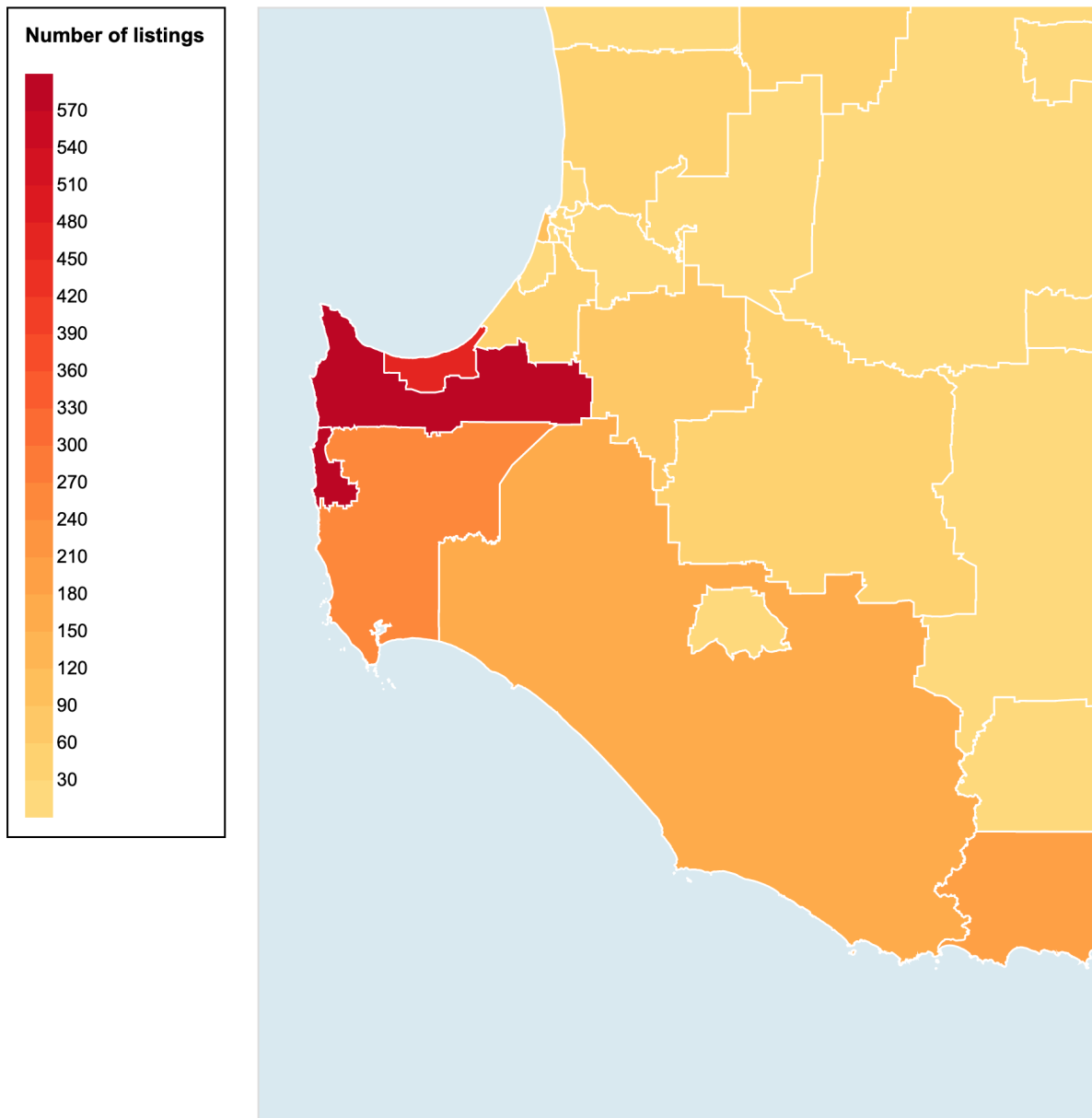
Analysis of TRA data from the International Visitor Survey 2019 (IVS2019) indicates that in 2019 approximately 22% of all international overnight visitors to the Margaret River Region were users of private accommodation (short-term) rental platforms such as Airbnb, HomeAway, vrbo, Couchsurfing, or similar. Private accommodation users are particularly prevalent among younger visitors below 40 years of age and among family groups (parents and children) as well as among groups of friends or relatives travelling together. Private accommodation users are also more prevalent among visitors from Singapore and Malaysia and among those arriving from the US and Canada.

As an example for the supply of private accommodation (short-term) rental, Figure 57 below illustrates the estimated number of listings on the Airbnb platform in February 2020 across several areas in the ASW region, including the Margaret River Region

(data source for estimates: Insideairbnb). There were an estimated 2,300 listings across the Margaret River Region with the vast majority of them concentrated in the northern and north-western parts of the region. Average prices per listing per night were estimated between \$215 and \$315.

Figure 57.

Location and Number of Airbnb Listings in Southwestern Regions of Western Australia, February 2020



Note: Only available listings are considered in the estimation. Unavailability may include occupation by a guest (booking), availability not provided by the host or cessation of activity. SA2 level boundaries are used. Data source: Insideairbnb, analysis of estimates and illustration by Daniele Fadda.

5.5 Resident Satisfaction

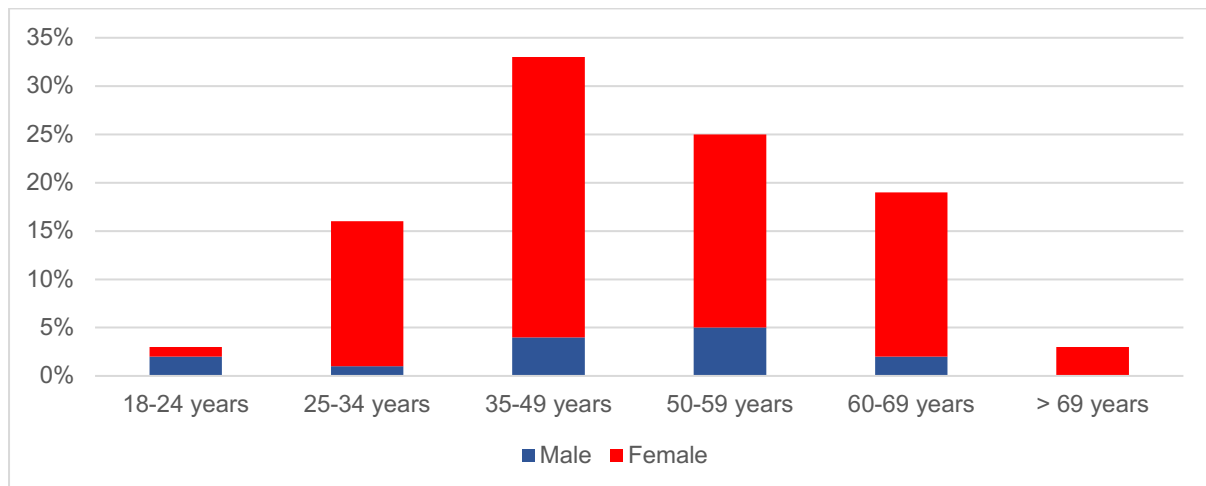
The data on resident satisfaction was collected from a total of 95 participants in an online survey conducted from 13 October to 29 October 2020. Only residents of the Shire of Augusta - Margaret River and the City of Busselton were considered as valid participants. Data was collected in collaboration with the Shire of Augusta - Margaret River and local community groups.

5.5.1 Sample

The majority of respondents were female (85%) and were aged between 35 and 59 years (58%) (see Figure 58).

Figure 58.

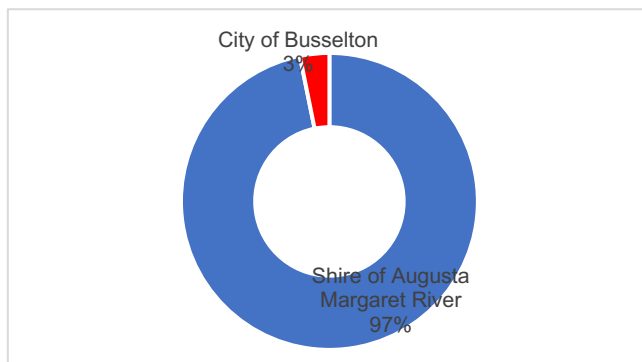
Distribution of Respondents based on Gender and Age



Note: Own data collection and analysis (N= 95)

Figure 59.

The Place of Residence of Respondents

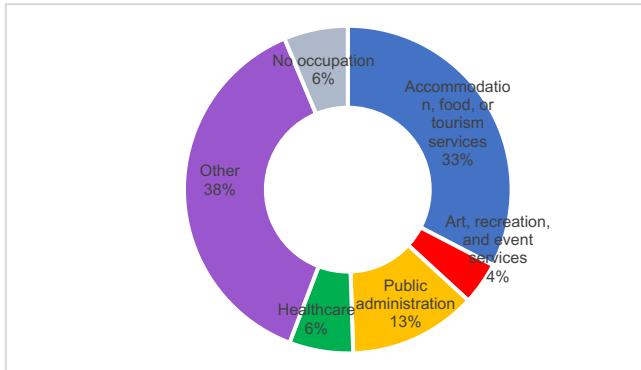


A total of 97% of respondents reside in the Shire of Augusta-Margaret River, while the rest resides in the City of Busselton (see Figure 59).

Note: Own data collection and analysis (N= 95)

Figure 60.

Occupation of Respondents



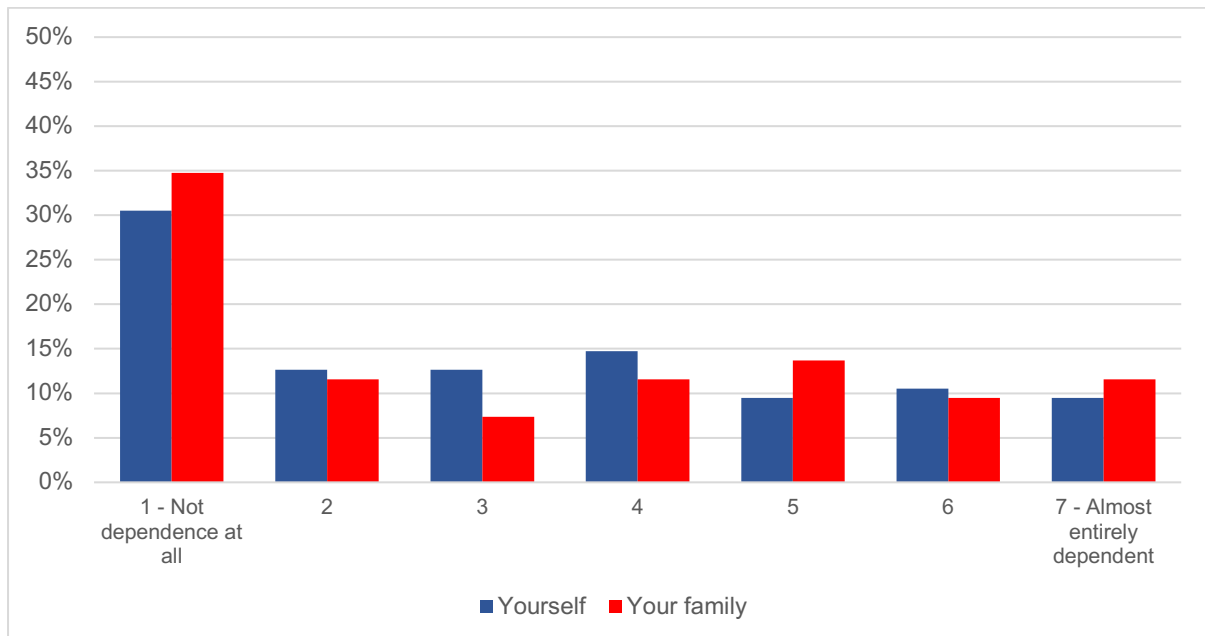
More than 30% of respondents work in the accommodation, food, or tourism services sector, while 13% work in public administration, 6% in healthcare, 4% in art, recreation and events, and 38% in other areas (see Figure 60).

Note: Own data collection and analysis (N= 95)

The majority of respondents indicate that their livelihood does not depend heavily on the tourism industry. Based on Figure 61, more than 30% of the residents claim that they and their family do not depend at all to the tourism industry, whereas around 10% of the respondents have their and their families' livelihood almost entirely dependent on the tourism industry.

Figure 61.

Respondents' Livelihood Dependence on the Tourism Industry

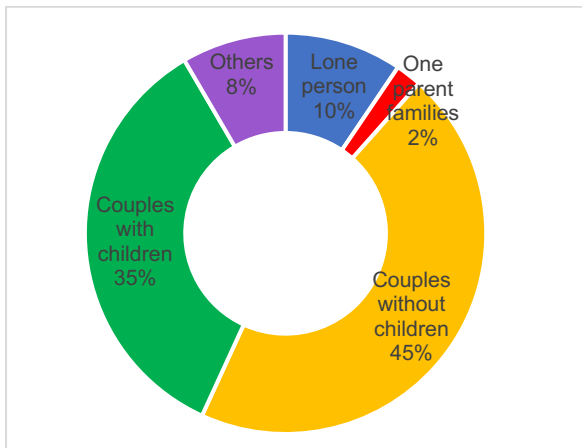


Note: Own data collection and analysis (N= 95)

Within the sample, 45% of respondent households were made up of couples without children, followed by 35% of couples with children (see Figure 62). Figure 63 shows that two income groups dominate among respondents: 26% of respondents declared a household income of \$40,000 - \$84,999 and 27% of respondents declared a household income of \$85,000 - \$129,999.

Figure 62.

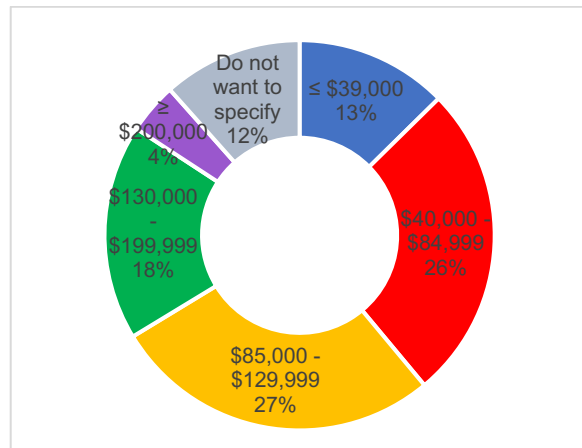
Household Type of Respondents



Note: Own data collection and analysis (N= 95)

Figure 63.

Household Income of Respondents

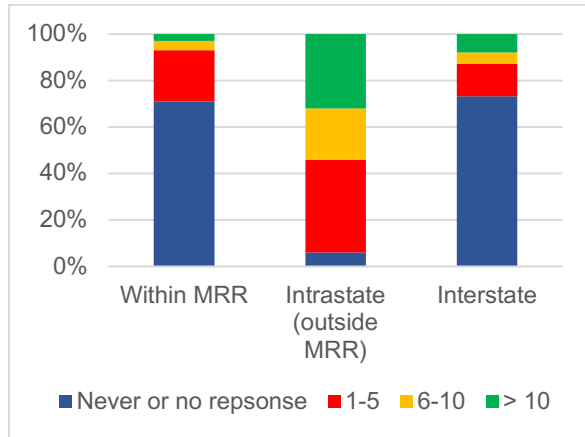


Note: Own data collection and analysis (N= 95)

Figure 64 shows that 94% of respondents engaged in overnight WA intrastate travels (outside the Margaret River Region) within the last 12 months. The figure also displays that 29% of respondents had overnight trips within the region, and 26% engaged in overnight interstate travels. During their lifetime, most of the respondents (84%) engaged in more than five international trips (Figure 65).

Figure 64.

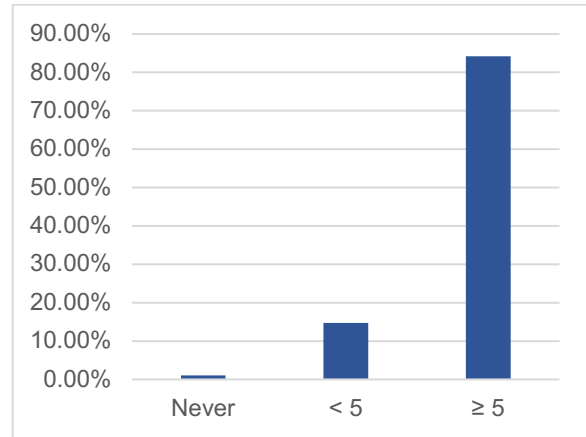
Frequency of Overnight Domestic Trips of Respondents for the last 12 Months



Note: Own data collection and analysis (N= 95)

Figure 65.

Frequency of International Travels among Respondents During their Lifetime



Note: Own data collection and analysis (N= 95)

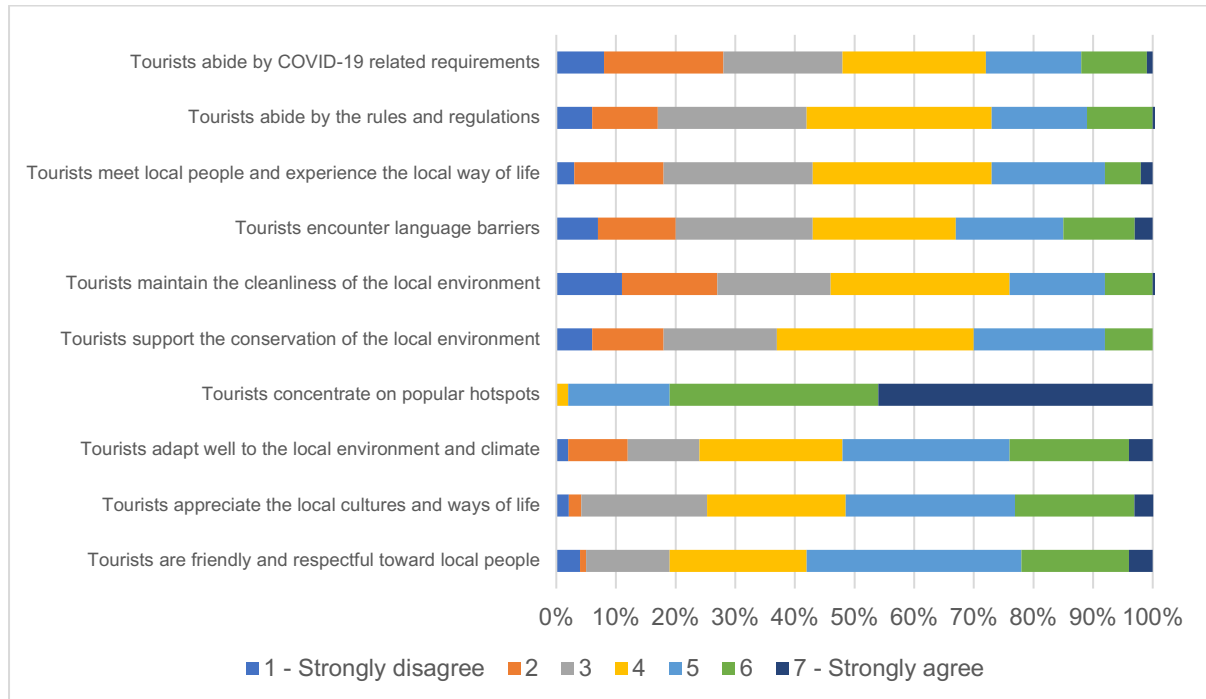
5.5.2 Descriptive Statistics on Resident Perceptions of Tourism

Figure 66 shows Margaret River Region residents’ perceptions towards tourists’ behaviours in the region. The figure indicates that 46% of surveyed residents strongly agree that tourists concentrate on popular tourism hotspots. No respondent disagreed with this statement.

Besides, residents also agree to a notable degree that tourists adapt well to the local environment and climate, that tourists appreciate the local cultures and ways of life, and that tourists are friendly and respectful towards local people. While averages remain close to the mid-point of the agreement/disagreement scale, residents show comparatively less strong agreement with statements regarding tourists’ maintaining the cleanliness of the local environment, abiding by the rules and regulations, meeting locals and experiencing their way of life, and supporting the conservation of the local environment.

Figure 66.

Residents' Perception of Tourists' Behaviours in the Margaret River Region

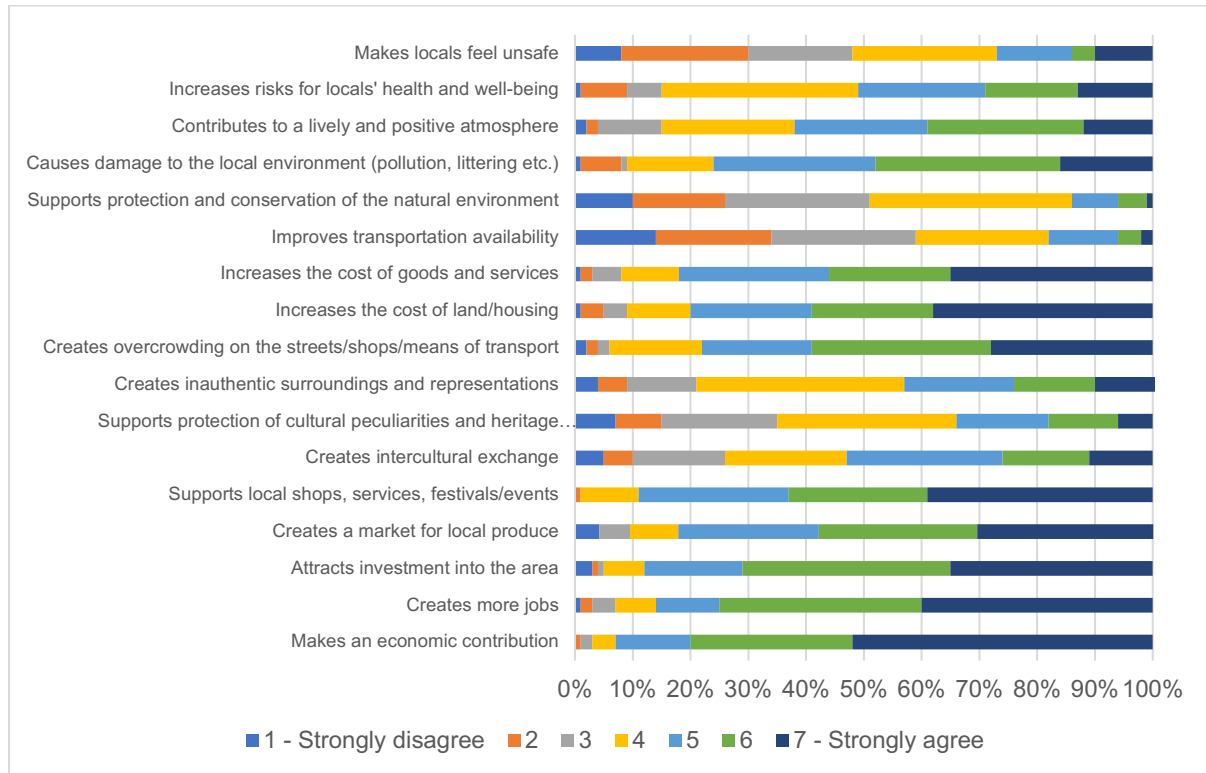


Note: Own data collection and analysis (N= 95)

Figure 67 highlights tourism impacts in the Margaret River Region as perceived by residents. More than 50% of residents strongly agree that tourism makes an economic contribution to the region. In addition, residents also strongly agree that tourism activities have other positive impacts for the region, including creating more jobs, attracting investment, supporting local businesses (shops, services, festivals and events) and creating markets for local produce. However, despite being cognisant of the benefits of tourism residents also show some concern regarding the impacts of tourism in terms of increasing the cost of land/housing and goods/services, creating traffic and overcrowding, and its impact on the local environment. Residents also question the contribution of tourism to increasing transportation availability.

Figure 67.

Residents' Perception of Tourism Impacts in the Margaret River Region

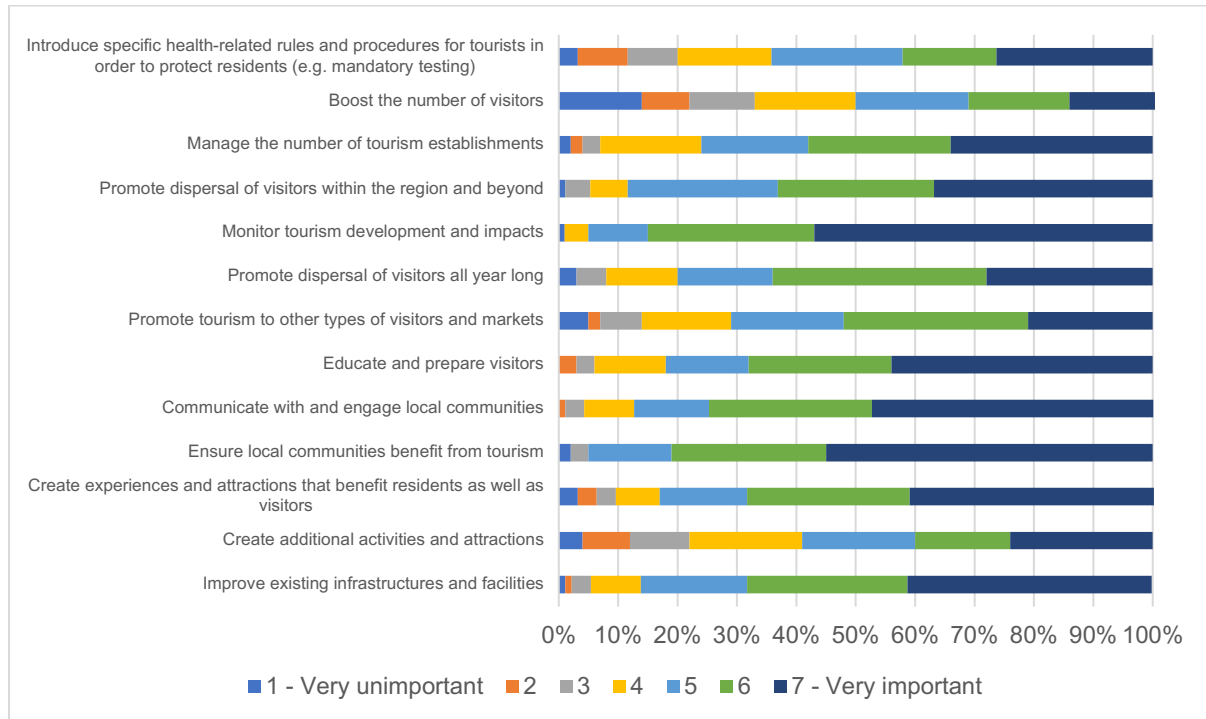


Note: Own data collection and analysis (N= 95)

The survey also collected the opinion of residents in the Margaret River Region on (potential) measures to manage the impacts of tourism in the region (Figure 68). Residents strongly agree with measures that strengthen benefits from tourism for local communities, with measures that monitor tourism development and impacts, and with measures that promote communication and engagement with the local communities. Educating and preparing visitors is also critical for managing the impact of tourism according to surveyed residents. Residents also show strong support for measures that help promote geographical and seasonal dispersal of visitors. While respondents provide mixed responses regarding boosting visitation numbers, they agree on the importance of improving existing infrastructure and facilities, managing the number of tourism establishments, and creating experiences and attractions that benefit both visitors and locals.

Figure 68.

Residents' Perception of Tourism Impacts Management in the Margaret River Region



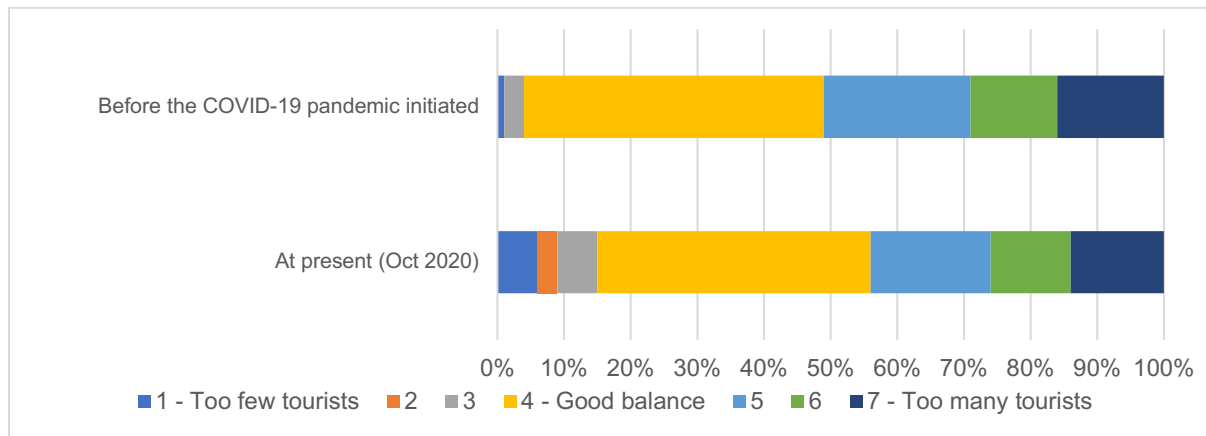
Note: Own data collection and analysis (N= 95)

5.5.3 Descriptive Statistics on Resident Perceptions of COVID-19 Impacts

As can be seen in Figure 69, 45% of residents agree that the number of tourists in the region was in good balance before the COVID-19 pandemic. The figure also shows that 41% of residents feel that the numbers continue to be balanced in October 2020 (after the COVID-19 outbreak); the number of people thinking that there are too few tourists only slightly increased compared to the pre-COVID-19 sentiments.

Figure 69.

Residents' Perception of the Number of Tourists Visiting the Margaret River Region Before the COVID-19 Pandemic and at Present (October 2020)

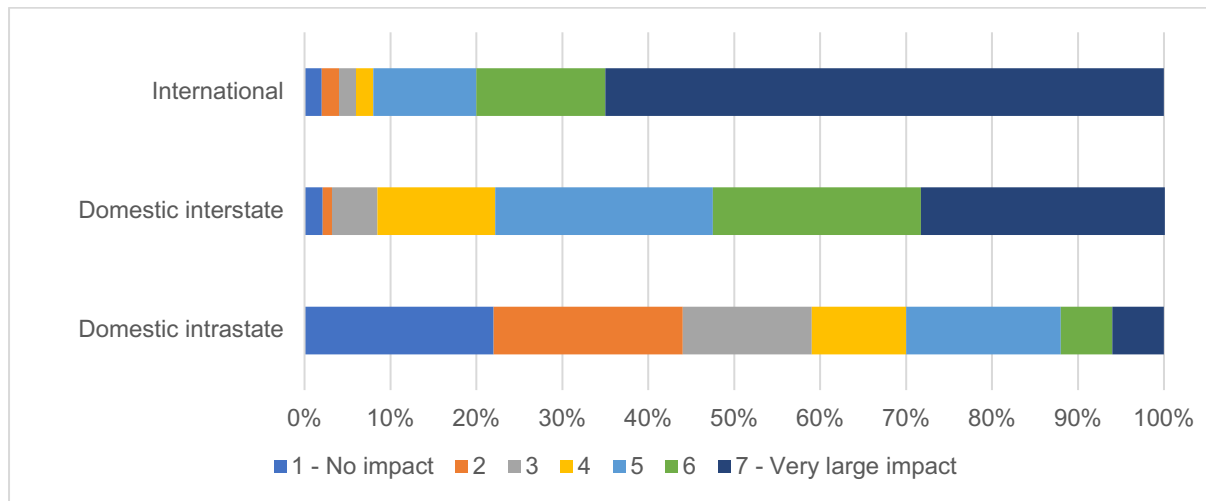


Note: Own data collection and analysis (N= 95)

More than 60% of surveyed residents perceive that international tourists may have a ‘very large impact’ on increasing the risk of COVID-19 transmission in the Margaret River Region (see Figure 70). 6% perceive they have little or very little impact on such risks. Domestic interstate tourists are considered to be a slightly less risky source, but still, only 8% perceive them to have little or very little impact on the risk of transmission of COVID-19 in the Margaret River Region. The percentage of ‘little or very little impact’ perceptions on COVID-19 transmission risks rises substantially to 59% with intrastate tourists. While the average perceived risk is relatively similar for international (6.2 out of 7) and domestic interstate tourists (5.5 out of 7), it drops dramatically for intrastate tourists (3.2 out of 7).

Figure 70.

Residents' Perception of the Risk for Transmission of COVID-19 in the Margaret River Region from Particular Tourist Categories

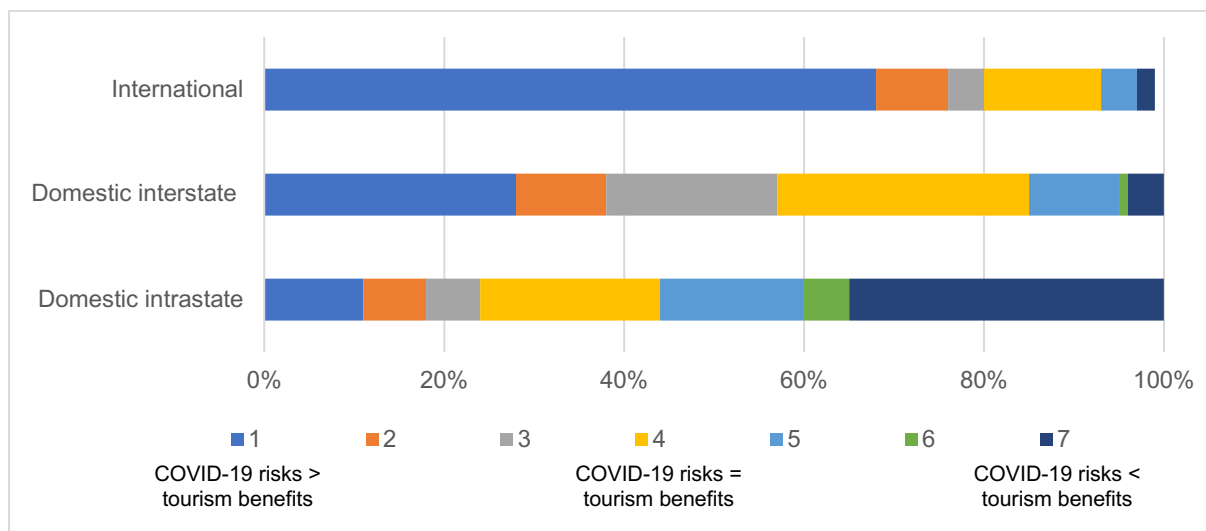


Note: Own data collection and analysis (N= 95)

A similar picture emerges from the analysis of residents' opinions regarding the benefits vs risks of having different tourist categories in the Margaret River Region (Figure 71). Residents consider the benefits of having intrastate tourists in the Margaret River Region to exceed the risks of COVID-19 transmission. The perceptions are opposite for international tourists and 57% of surveyed residents also perceive notable risks with hosting interstate tourists.

Figure 71.

Residents' Opinion on the Benefits versus Risks of Travel in the Margaret River Region Related to Particular Tourist Categories



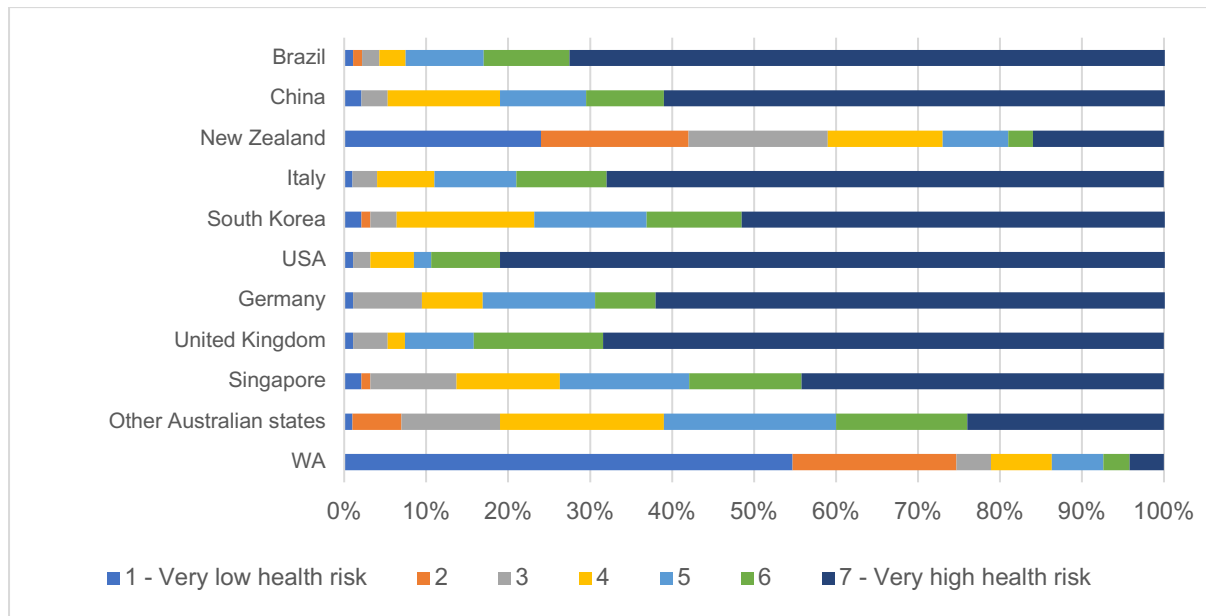
Note: Own data collection and analysis (N= 95)

Figure 72 shows the perceptions of the Margaret River Region’s residents on health risks related to hosting particular tourists who have been in different regions/countries within the past two weeks (assuming that no quarantine on arrival to WA is required). Besides intrastate tourists, tourists from New Zealand are perceived to be associated with low health risks; remarkably, the associated health risk is lower for visitors from New Zealand compared to interstate Australian tourists. Visitors from the US are perceived to pose the highest risk among the countries and regions listed.

Additional analysis of perceived risks with international tourists shows that there is a strong alignment between perceived health risks and overall absolute COVID-19 cases in source countries (correlation coefficient of 0.79, after logarithmic transformation); as well as between perceived health risks and recently registered new cases in the source countries (as of 1st October 2020; correlation coefficient of 0.81, after logarithmic transformation). This indicates that residents in the Margaret River region take a relatively fact-based approach to assess the health risks of potential visitors during and/or immediately after the COVID-19 pandemic.

Figure 72.

Residents’ Perceptions on Health Risks of Hosting Tourists who have been in the Following Regions within the Past Two Weeks

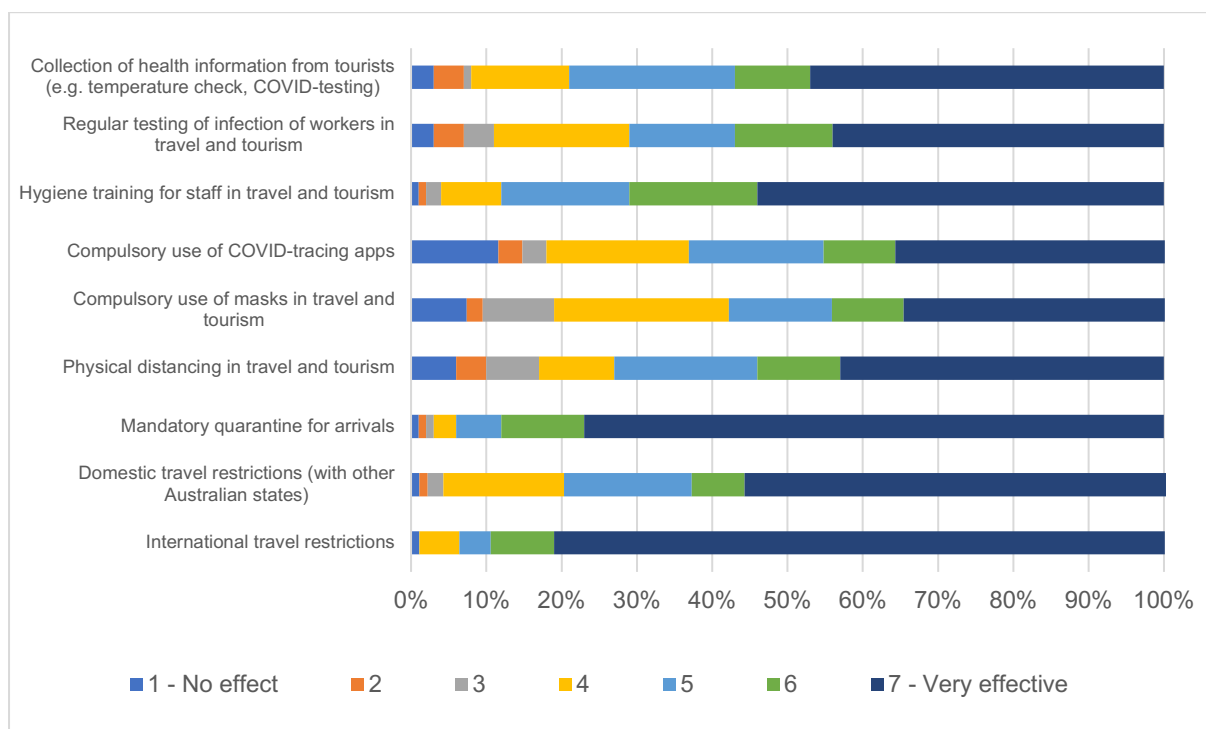


Note: Own data collection and analysis (N= 95)

Figure 73 highlights that surveyed residents agree that the most effective containment measures to control the risks of COVID-19 spreading in the Margaret River Region in a tourism context include travel restrictions and mandatory quarantine for arrivals. Hygiene training for staff in tourism also finds strong support. Meanwhile, according to surveyed residents, the least effective containment measures are the compulsory use of masks and compulsory use of COVID-tracing apps.

Figure 73.

Residents’ Opinion on the Effectiveness of Containment Measures in Helping to Control the Risks of COVID-19 Spreading in the Margaret River Region

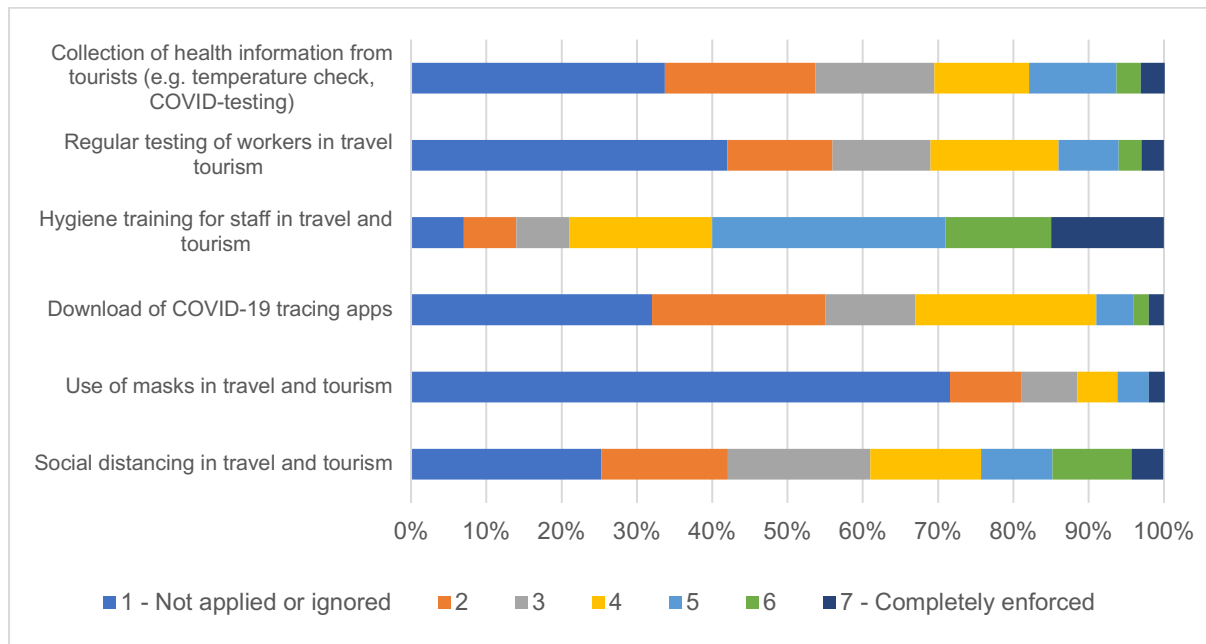


Note: Own data collection and analysis (N= 95)

Figure 74 summarises residents’ opinions regarding the extent to which some of the containment measures have been implemented (and are actually observed) in the tourism and hospitality sector in the Margaret River Region. It is perceived that among the listed measures, only hygiene training for staff has been enforced to a relatively high degree in the region.

Figure 74.

Residents' Opinion on the Degree of the Actual Implementation of Containment Measures in the Tourism and Hospitality Sector in the Margaret River Region

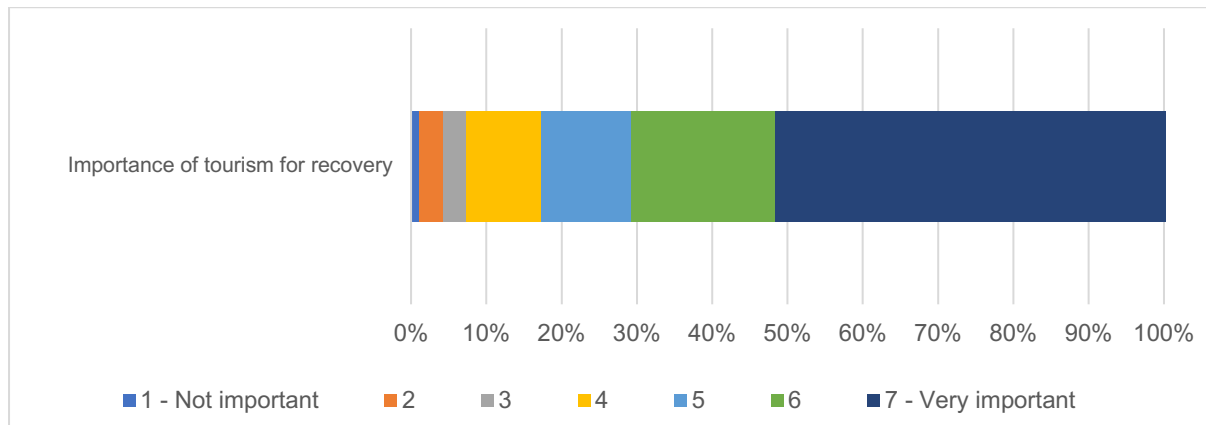


Note: Own data collection and analysis (N= 95)

As can be seen in Figure 75, more than 50% of the residents surveyed agree that tourism is very important for economic recovery after the COVID-19 pandemic in the Margaret River Region. Overall, 83% see tourism as being at least somewhat important to the economic recovery in the region.

Figure 75.

Residents' Opinion on the Importance of Tourism for Economic Recovery After the COVID-19 Pandemic in the Margaret River Region



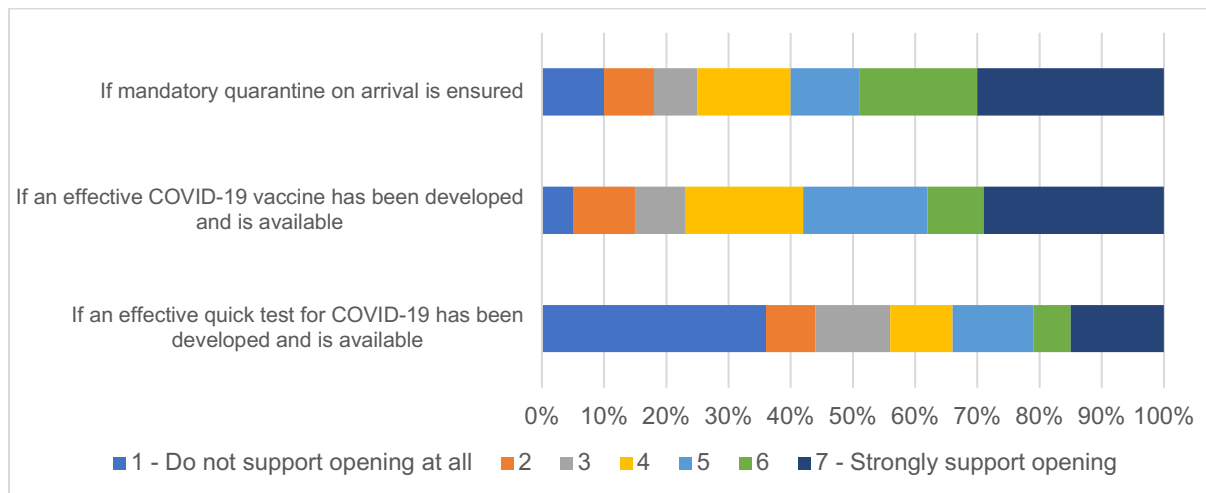
Note: Own data collection and analysis (N= 95)

Figure 76 shows resident support for opening international borders to tourists under three different scenarios. Support for the first two scenarios (mandatory quarantine and/or effective vaccine) is relatively similar. Under these two scenarios, up to 60% (if the mid-point of the scale is excluded) or up to 77% (if the mid-point of the scale is included) at least somewhat support the opening of borders to international tourists.

Under the scenario of (only) an effective COVID-19 rapid test being available and applied, a majority of respondents would not support the opening of international borders to tourists.

Figure 76.

Residents’ Support for the Opening of Borders to International Tourists



Note: Own data collection and analysis (N= 95)

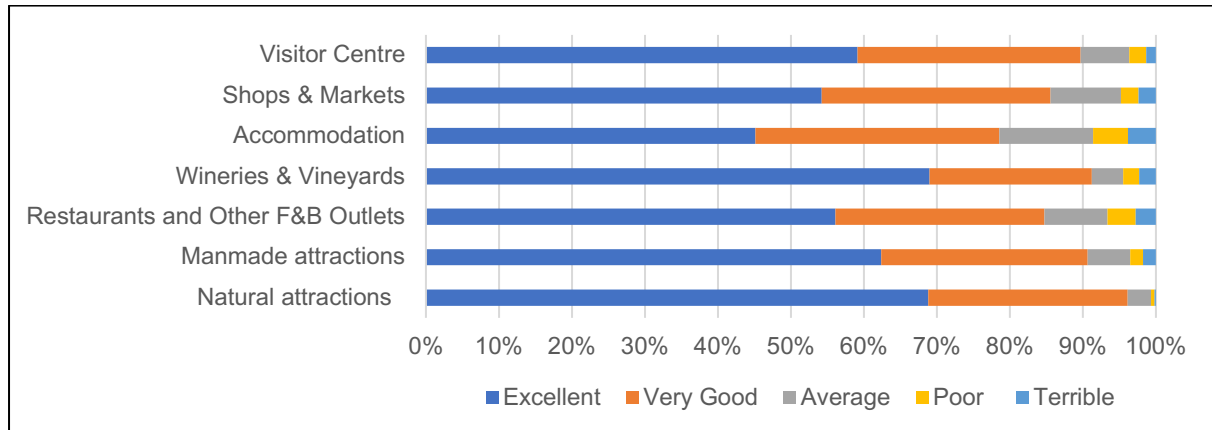
5.6 Visitor Satisfaction

Due to COVID-19-related limitations in primary data collection, this section estimates visitor satisfaction based on a compilation of TripAdvisor’s visitor reviews for a number of key attractions and facilities in the Margaret River Region. Figure 77 below shows that, in general, visitors are satisfied with all the key attractions and facilities in the Margaret River Region. The natural attractions category which includes beaches, National Parks, and caves receives the best reviews, with 69% and 27% of the visitors giving 'excellent' and 'very good' scores, respectively. Figure 77 indicates that 62% of visitors at manmade attractions, including museums, galleries, and theme parks, give an 'excellent' rating. Wineries and vineyards, being among the key strengths and

attractors of the region, also receive very positive visitor reviews, with 69% of reviewers judging the experience to be 'excellent' and 22% to be 'very good'. Accommodation receives slightly lower reviews, with 45% of tourists giving 'excellent' scores.

Figure 77.

Visitor Satisfaction with Key Attractions and Facilities in the Margaret River Region

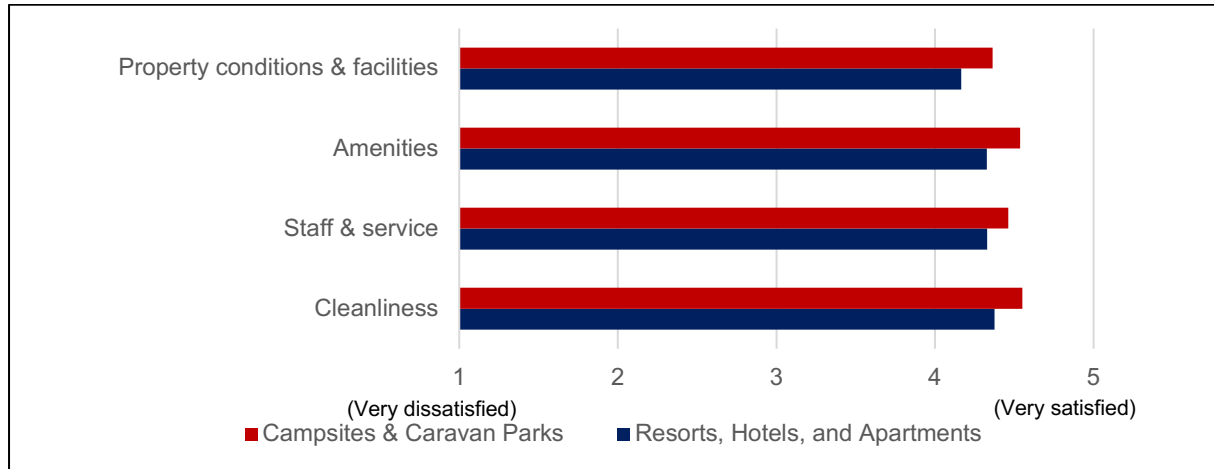


Note: Based on the average of the visitor reviews on various key attractions and facilities in the Margaret River Region (with more than 50 reviews), derived from TripAdvisor (2020). Own elaboration and illustration.

Based on a compilation of Expedia visitor reviews, visitors seem to be satisfied with their accommodation (resorts, hotels, apartments, camp, and tourists park) in the region, with an average score of 4.3 out of 5. Figure 78 shows that visitors staying in campsites and caravan parks are slightly more satisfied (score of 4.5/5) than visitors staying in resorts, hotels, and apartments in the region (score of 4.3/5). Visitors are satisfied the most with the cleanliness of the premises, with a score of 4.4 for resorts, hotels and apartments, and a score of 4.6 for campsites and caravan parks. On the contrary, visitors are least satisfied with the property conditions and facilities, scoring 4.2 and 4.4, respectively. This is mostly due to some reviewers considering properties to be old with limited facilities, such as no swimming pool (Expedia Group 2020a, 2020b). Meanwhile, staff, services and amenities show similar reviews, with a score of 4.3 for resorts, hotels and apartments, and a score of 4.5 for campsites and caravan parks.

Figure 78.

Visitor Satisfaction with Commercial Accommodations' Services and Facilities in the Margaret River Region



Note: Based on the average of the visitor reviews in a sample of accommodations in the Margaret River Region (with more than 100 reviews), derived from Expedia Group (2020a, 2020b). Own elaboration and illustration.

5.7 Energy Management

Environmental sustainability is a relevant component of climate change mitigation. It includes energy management, which is strongly supported by various organisations including the Margaret River Busselton Tourism Association (MRBTA), the Shire of Augusta-Margaret River and the City of Busselton. Based on information from the Shire of Augusta-Margaret River (2017b), energy consumption around the region has generally increased due to an increasing population and an increase in tourism and agricultural activities. Tourism and viticulture activities are relevant energy consumers in the region; therefore, the implementation of energy-saving measures in tourism is of relevance (Shire of Augusta-Margaret River, 2017b).

The energy management strategy adopted by the City of Busselton is part of the City's strategies to reduce carbon emissions. Based on the City of Busselton Energy Strategy 2020-2025, the vision of the City of Busselton (2019) in terms of energy management is:

"Minimise energy costs and greenhouse gas emissions, through using energy as efficiently as possible and optimising our approach to generation and use of renewable energy, and to maximise returns to ratepayers through becoming a net energy generator".

Energy targets adopted by the City of Busselton are: (1) to generate 100% of the City of Busselton's electricity needs from renewable sources by 2030; (2) to reduce City of Busselton's corporate carbon emissions per capita to 50% on 2017/18 levels by 2030; and (3) develop efficiency targets for fleets and plants by 2025. Based on the City of Busselton Energy Strategy 2020-2025, key proposed strategic actions include:

- Renewable energy sources, with the installation of 100kW of solar PV Systems at the Geographe Leisure Centre to reduce its energy consumption as one of the largest consuming facilities in the City; and
- monitoring and implementing sustainable building design to achieve more effective and sustainable energy management when designing and procuring new facilities.

Meanwhile, both the Shires (AMR and City of Busselton) and non-profit organisations (e.g., Margaret River Regional Environment Centre and Augusta-Margaret River Clean Community Energy) are working together to achieve better energy management practices. While the Margaret River Regional Environment Centre (MRREC) focuses on general environmental sustainability practices, Augusta-Margaret River Clean Community Energy (AMRCCE) is dedicated to reducing overall carbon emissions and carbon emissions in the Shire by partnering with others to create renewable energy (solar and/or wind) facilities in the Shire. One of the long-term visions of AMRCCE is to assist in marketing the AMR as a 'green destination' (AMRCCE, 2018). The main strategies and actions in energy management in the Shire Augusta-Margaret River are explained in Table 6.

Table 6.*Energy Management Strategies for Tourism Enterprises in the Shire of Augusta-Margaret River*

Strategies	Actions
Renewable energy sources (AMRCCE, 2018, p. 10)	Proposal to build a renewable energy plant consists of 10MW of wind energy to be derived from three 3.3 MW wind turbines, and up to 2MW of biogas from the dairy farms, which would produce up to 50% of the energy consumed through the grid of the Shire.
Reduce carbon emissions (AMRCCE, 2018)	Minimum reduction of 20% of the carbon emissions in the AMR by implementing sustainable energy sources.
Improve energy efficiency (Shire of Augusta-Margaret River, 2014, p. 11)	<ul style="list-style-type: none"> • Install pool blankets to reduce heating requirements. • Investigate the installation of LED lighting on Gloucester Park sports ovals following comparison between various lighting options. • Investigate installation of sub-metering for the Recreation Centre, Cultural Centre and other sports clubs to understand electricity used within each complex. • Install a sea bus system for lighting at a central location within the Recreation Centre. • Replace pool heat pumps with energy-efficient hydrocarbon refrigerant units • Undertake an energy audit to determine the effectiveness of heat pumps and to identify alternative options to reduce energy consumption and costs.

Note: Based on the Shire of Augusta-Margaret River reviews of the Local Energy Action Plan 2006/2007 and AMRCCE Annual Report 2017/2018

As mentioned earlier, the most common practices for tourism enterprises in promoting sustainable energy management include reducing energy use by using energy-efficient lighting and electronic appliances, installing renewable energy sources, particularly solar panels, using energy-efficient reverse cycle air conditioning and providing natural insulation to reduce the need for heating or cooling. Some of the tourism enterprises that are practising these strategies include the Busselton Jetty, the Margaret River Recreation Centre, Turner Caravan Park, Flinders Caravan Park, RAC Busselton Holiday Park WA, Cullen Wines, Karridale Cottages & Hop Farm, Margaret River Retreat, Yelverton Brook Eco Spa Retreat & Conservation Sanctuary, Forest Rise Eco Retreat, 5 Rooms Retreat and Baywatch Manor Augusta (Dyer, 2020; Eco Tourism Australia, 2020). Furthermore, the MRBTA, which manages several attractions in the Margaret River Region, also supports sustainable energy management by using LED 12-volt lights in all of their caves and solar power at one site (will planned roll outs to others).

Based on the Local Energy Action: Review of Progress Between 2006/2007 - 2015/2016 of the Shire of Augusta-Margaret River (2017b, p.14), the Recreation Centre was able to reduce energy use, due to:

- Two energy audits of all 3 phase power equipment;
- Replacement of inefficient lighting with LED lighting throughout the building;
- Installation of a 21kW solar panel and wind turbine system;
- Installation of a smart meter to ensure better management of energy use;
- Installation of pool blankets to reduce heat loss from the pool; and
- Purchase of hot water saving equipment to reduce electricity.

On the other hand, the caravan parks, particularly Flinders Caravan Parks, experienced an increase in electricity use and cost due to the full replacement of diesel generators with solar and electric heat pumps, believed to be a cleaner technology to reduce carbon emission (Shire of Augusta-Margaret River, 2017b, p.16-18).

Table 7.

Average Annual Change in Electricity Use/Costs between 2006/2007 and 2015/2016 in Selected Tourism Attractions and Providers

	Recreation Centre	Turner Caravan Park	Flinders Caravan Park
Average annual change in electricity costs since 2006/07	+ \$65,000	+ \$26,000	+\$12,000
Average annual change in electricity use since 2006/07	- 3%	+ 15%	+ 102%

Notes. Based on the Shire of Augusta-Margaret River Local Energy Action: Review of Progress Between 2006/2007 - 2015/2016 (Shire of Augusta-Margaret River, 2017b, p.13)

5.8 Water and Wastewater Management

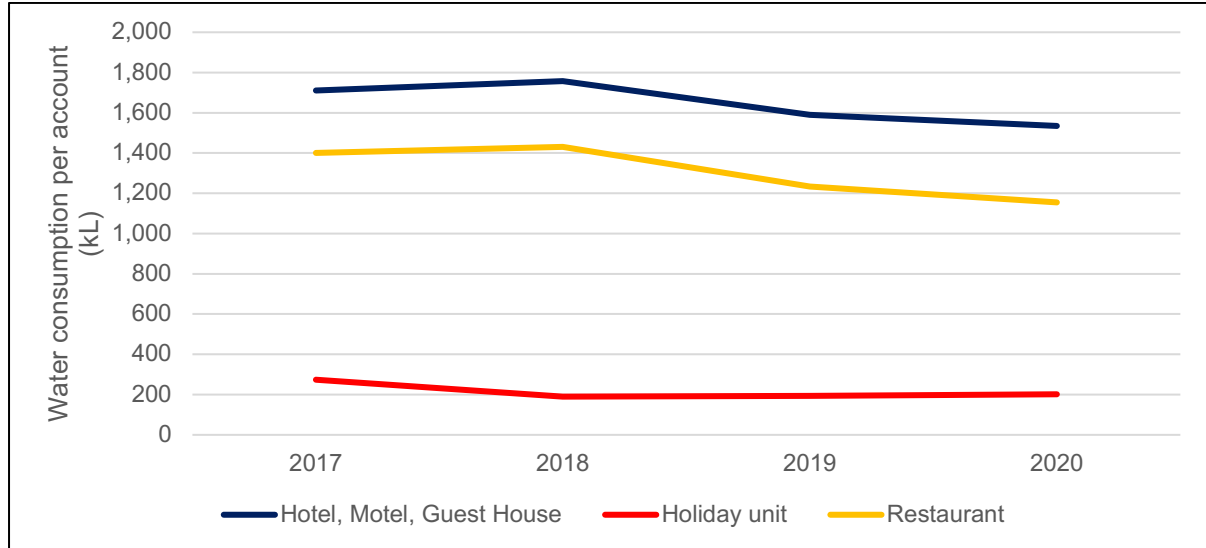
Sustainable water management in the tourism industry is essential, as the tourism industry and related industries (such as wineries) are relevant consumers of water. Water management in the region is managed by two different corporations: Busselton Water for the Busselton City centre (as well as Port Geographe, Siesta Park, Vasse, Wonnerup, and Dunsborough and Water Corporation for the rest of the region. Sustainable water management in the region is part of the 'Water Forever: South West' agenda, which promotes water efficiency initiatives, alternative water supplies, large scale recycling, groundwater replenishment, desalination, source recovery, surface

water options and water carting (Water Corporation, 2015). Sustainable water management in the region follows the vision to reduce water use by 25% by 2030 (Water Corporation, 2015). Under the Water Efficiency Management Plan (WEMP) by Water Corporation (2007), business customers with more than 20,000kL annual water use are required to participate in the 'Waterwise Business Program' by submitting water efficiency management plans and reporting their annual progress. Since the implementation of the WEMP, the involved businesses involved have reduced their water use by approximately 35% (Water Corporation, 2015).

Although most of the tourism enterprises in the region are not required to participate in the 'Waterwise Business Program', Figure 79 indicates the decreasing trend in water consumption within tourism and hospitality-related enterprises in parts of the Margaret River Region (Augusta, Cowaramup, Margaret River-Gnarbup-Prevelly and Yallingup-Dunsborough). Between 2017 and 2020, the hotel, motel and guest house categories reduced their water consumption per account by approximately 10% overall and 3.5% annually. Restaurants decreased their consumption by 17.5% overall and 6% annually over the same period of time. Holiday units managed to shrink water consumption by 26.5% per account between 2017 and 2020 (10% annually).

Figure 79.

The Average Volume of Water Consumption per Account for Tourism and Hospitality Related Businesses in Parts of the Margaret River Region (Water Corporation Accounts), 2017-2020



Note: Data shown in the figure represents average water consumption per account for different tourism and hospitality business types. Areas covered include Augusta, Cowaramup, Margaret River-Gnarbup-Prevelly and Yallingup-Dunsborough. Data collected and provided by Water Corporation (2021). Own elaboration and illustration.

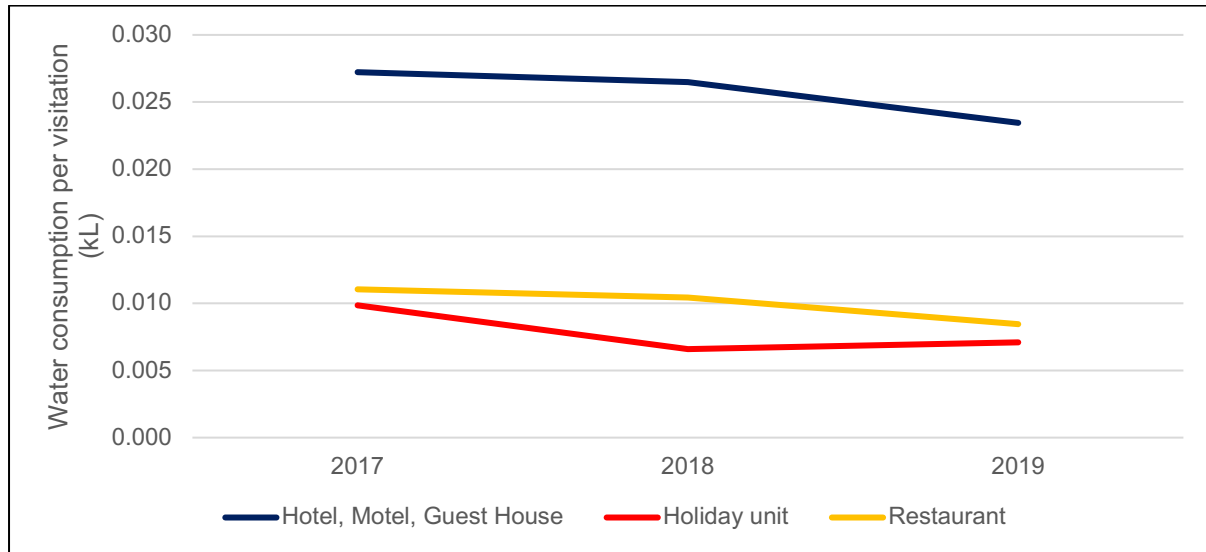
Concurrently, Figure 80 also shows the decline in water use if divided by overall number of visitors in the region for different types of tourism and hospitality enterprises in the region. It has to be noted though that overall regional visitation has been used, not visitation to a particular accommodation category or even to a specific premise and that the number of visitors covers the entire Margaret River Region, whereas the water readings only cover parts of the region. For hotels, motels, guest houses and for holiday units, overnight tourists have been used as denominator; for restaurants, the sum of overnight and daytrip visitors have been used as denominator. This calculation is only a very rough approximation and would not be accurate in absolute terms of pro capita consumption. However, it provides a useful perspective on trends in tourism and hospitality-related water consumption as it normalises consumption by visitation and thus accounts for effects related to fluctuation in visitation.

Between 2017 and 2019, water consumption per visitor in the Margaret River Region in hotels, motels and guest houses decreased by 7% per annum per guest (and by 14% over the whole period). Meanwhile, within the same period, water consumption

per visitor in holiday units and restaurants in the region diminished by 15% and 13% per annum, respectively.

Figure 80.

The Average Volume of Water Consumption per Visitor in Hospitality and Tourism Related Businesses in Parts of the Margaret River Region (Water Corporation Accounts), 2017-2019

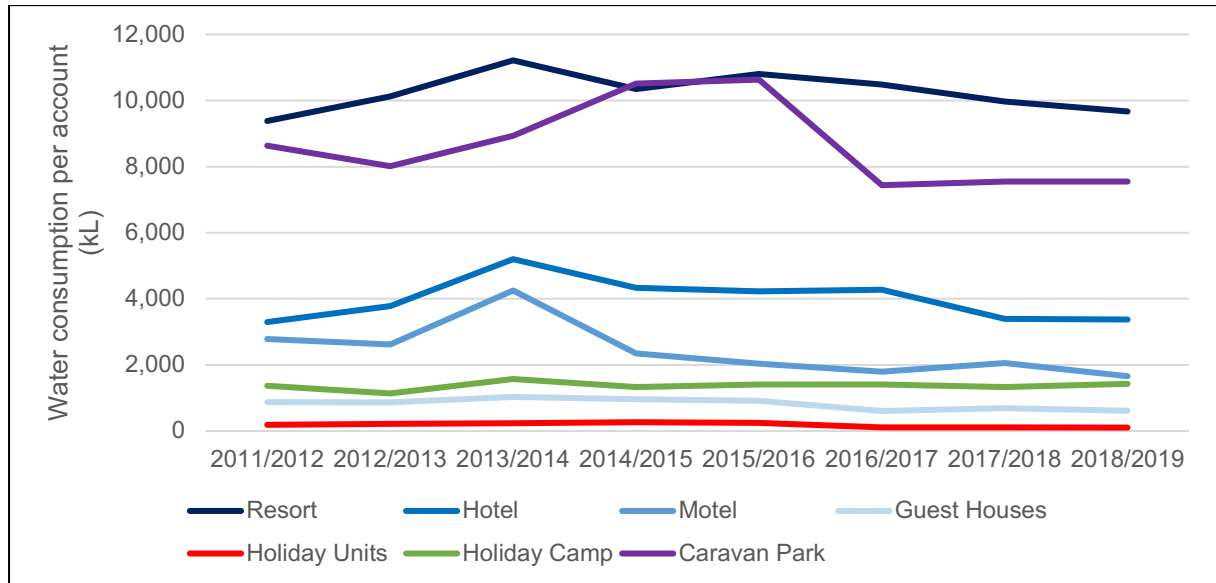


Note: Data shown in the figure presents average water consumption (kL) in hospitality and tourism related businesses divided by the total visitors in the Margaret River Region. Water consumption data has been collected and provided by Water Corporation (2021). Visitation number are taken from the IVS and NVS, Tourism Research Australia. For hotel, motel, guest house and holiday units, overnight tourists have been used in the denominator; for restaurants, the sum of overnight *and* daytrip visitors have been used in the denominator. Please note that the number of visitors covers the entire Margaret River Region, whereas water consumption only covers accounts in parts of the region. Own elaboration and illustration.

Busselton Water is responsible for the other accounts in the Margaret River Region which are not covered by the Water Corporation. Busselton Water accounts are concentrated in some parts of the City of Busselton and the following data is taken from these accounts. Based on Figure 81 below, Busselton Water accounts classified as ‘guest houses’ reduced their water consumption by 5% per annum, motels by 9% per annum, caravan parks by 2% per annum and holiday units by 8.5% per annum (between 2011/2012 and 2018/2019). Water consumption in hotels remained relatively stable with a slight increase of 0.3% per annum over the same period.

Figure 81.

The Average Volume of Water Consumption per Account for Different Types of Accommodation Enterprises in the Busselton Area (Busselton Water accounts), 2011-2019



Note: Data shown in the figure represents total water consumption (kL) divided by the total number of business accounts for different accommodation types as collated by Busselton Water (2020). Own illustration.

The 'Waterwise Business' strategy contributes to water consumption reduction across the tourism sector in the City of Busselton (Busselton Water, 2019). Based on the Busselton Water Strategic Plan (Busselton Water, 2019), actions that can be implemented by tourism businesses as part of 'Waterwise Business' include planting a water-wise garden, undertaking water audits, managing water pipes (checking and fixing leaks), recycling grey water for watering the garden, water usage monitoring and planning/implementing water self-sufficiency strategies. The most common sustainable water management practices among tourism enterprises in the region, as implemented by Margaret River Retreat, Yelverton Brook Eco Spa Retreat and MRBTA, include: practising water-wise garden management, using water savings appliances, self-sufficient water resourcing (harvesting rainwater or responsible resourcing from a renewable dam), and encouraging staff and visitors to reduce water use, (Dyer, 2020; Eco-Tourism Australia 2019, 2020). Tourism enterprises, such as Wyndham Resort and Spa and Ramada Resort by Wyndham Dunsborough, have

been acknowledged for their sustainable water management practices by Busselton Water (Busselton Water, 2019).

Based on Water Corporation (2015) data, up to 28% of treated wastewater in the region is recycled each year to irrigate golf courses, woodlands and public open spaces. The South West Region, particularly the Margaret River Region, have managed to recycle the most wastewater compared to other regions in WA, with the major recycling schemes including the Busselton Golf Club irrigation scheme and the Margaret River recycling scheme. Recently, the Margaret River wastewater facility has been upgraded to cope with future demand.

In practising sustainable wastewater management, some of the tourism enterprises in the region are implementing greywater systems on bathroom and laundry amenities and also use recycled wastewater for watering the garden (Busselton Water 2019; Dyer, 2020).

5.9 Solid Waste Management

In general, sustainable waste management in the region follows the Western Australian Waste Strategy (2012-2020): "The primary goal of sustainable waste management strategies is to reduce the environmental impact of waste and maximise conservation of natural resources through reduced overall material use and increased materials and energy recovery" (the City of Busselton, & Shire of Augusta-Margaret River, 2014, p.9). Particularly for the commercial and industrial waste sector, in 2014 the State targeted a 55% diversion from landfill of material presented for collection by 30 June 2015 and a 70% diversion by 30 June 2020. According to the Capes Regional Organisation of Councils (CAPEROC), the City of Busselton and the Shire of Augusta-Margaret River (2014, p.15-16) jointly decided to pursue a regional waste project with the intent of:

- Working with State Government and regional private partners to develop and implement waste minimisation and waste recycling initiatives: (1) Sourcing and maintaining end-users for recyclable products; (2) Developing partnerships with value-adding waste recycling operators within the region; and (3) Providing solutions for the handling and disposal of potentially hazardous materials.

- Providing extensive and ongoing community education programs. The community is seen as the primary tool for minimising waste generation and maximising waste recycling.
- Securing recycling and disposal infrastructure capacity and improvement, in line with best practice guidelines and process streamlining.
- Concentrating on priority waste streams to improve diversion rates while considering the specific regional context and best value for rate-payer considerations (cost-effectiveness).

The sustainable waste management practices in the region's tourism industry are strongly supported and sometimes initiated by not-for-profit organisations, such as MRREC, Busselton-Dunsborough Environment Centre, and Cape to Cape Plastic Free, with a focus on eliminating single-use plastic bags/containers and on recycling waste materials. For example, MRREC has been working on lobbying multiple stakeholders to eliminate single-use plastic bags, producing reusable eco-friendly bags that can be borrowed from shops in Margaret River and assisting with coffee cup wash-up station.

Most common practices in sustainable waste management among tourism enterprises in the region include reducing single-use plastic, providing reusable food and drink containers, using recycled products and using recycling bins (Dyer, 2020). Based on 'Responsible Cafes', a not-for-profit organisation that works in educating, promoting and implementing sustainable practices in restaurants and cafes, there are at least 20 hospitality venues across the region that have been practising single-plastic use reduction and reusable foods and drinks containers provision. Meanwhile, MRBTA focuses on educating their staff and customers about ways to reduce, reuse and recycle (Eco Tourism Australia, 2019).

In the context, the Margaret River Retreat is here used as an example of 'good practice' example. It has been awarded an 'Ecotourism Certification' by Ecotourism Australia (2020) and is committed to sustainable waste management practices through:

- the use of recycled products supplied by eco-minded suppliers;

- the collection and recycling of soft plastics through soft-plastics recycling programs (e.g., Redcycle);
- the composting of organic kitchen waste to feed domestic and farm animals;
- together with SoapAid the collection, recycling and redistribution of soap from the tourism accommodations to communities in need of hygiene education;
- donation of all of its near date food to the local Margaret River Soup Kitchen on a monthly basis; and
- the introduction and training of staff to the property's recycling systems, gardening, composting, worm farm, sustainable cleaning practices and other waste management practices.

5.10 Regional Cycles

Regional cycles in this report refer to the regional or local sourcing of resources to run businesses. This includes product resources and employment resources. The Margaret River Region is not only known as a fascinating nature-based tourism destination but also as a wine region, which can support the establishment of short regional cycles in the region's tourism and hospitality industries. The sustainable regional cycle is a pillar of any self-sustained community and can create synergies for multiple parties involved.

This section focuses on discussing only the product sourcing, including foods and beverages. There are three approaches in practising sustainable product sourcing among tourism enterprises in the region, which are locally-sourcing their products, establishing on-site gardens/farms or a combination of both. Of course, a substantial number of tourism enterprises locally source their wines from around the region. Yallingup Forest Resort is a good practice example that does not only source food and beverage ingredients locally but does the same with their bathroom products. Meanwhile, other enterprises, including Yallingup Forest Resort, Cullen Wines and Burnside Organic Farm opt to be self-sufficient by having gardens and farms on-site to source ingredients for their restaurants. Margaret River Retreat focuses on grown and gathered produce from local producers as well as their own gardens.

5.11 Inclusion and Accessibility

As stated by the Shire of Augusta-Margaret River (2017a, p.10), inclusion refers to "social inclusion, in that all people of diverse abilities and backgrounds have the opportunity to participate in a welcoming community". In contrast, access refers to "physical access to the natural and built environment – buildings, recreational facilities, parks, bushlands, beaches and footpaths – as well as access to services, events and information". Both local councils (the City of Busselton and Shire of Augusta-Margaret River), under the "Disability Access and Inclusion Plan 2018-2020", are committed to catering to the needs of a diverse community, including people with disabilities and people from culturally and linguistically diverse backgrounds. Under the Plan, people with disabilities and people from culturally and linguistically diverse backgrounds should be granted the same opportunities as anyone else to access services, information, events, buildings and facilities as well as to participate in any activities and employment. In 2018-2019, the Shire of Augusta-Margaret River won the region's accessibility award.

This sub-chapter discusses the disabled-access facilities provided by tourism enterprises in the Margaret River Region. In alignment with the councils' strategy, many tourism enterprises implemented specific measures to improve access for disabled people on their premises, including accessible parking, ramps and accessible toilets. Table 8 below details the disabled-access facilities provided by different types of tourism enterprises in the region.

Table 8.*Estimates of Tourism Enterprises Providing Disabled-Access Facilities and Type of Facilities*

Type of Business	% of Enterprises	Type of Disabled-Access Facilities
Natural attractions	Min. 50%	Accessible parking, wheelchair access (ramp), accessible toilets, and beach wheelchair
Manmade attractions	Min. 60%	Accessible parking, wheelchair access (ramp), and accessible toilets. Lift access in the lighthouses
Restaurants, cafes, wineries and other F&B outlets	Min. 65%	Accessible parking, wheelchair access (ramp), accessible tables and accessible toilets
Accommodations (> 5 rooms)	Min. 80%	Accessible room(s), accessible parking, wheelchair access (ramp), and accessible toilets. The high-rise accommodation buildings provide an accessible lift.
Shops and markets	Min. 70%	Accessible parking, wheelchair access (ramp), and accessible toilets
Visitor Centres	100%	Accessible parking, wheelchair access (ramp), and accessible toilets

Notes: Based on data compiled by MRBTA (2020) and enterprise websites. Own elaboration.

While only 50% of the natural attractions provide disabled-access facilities (partially due to the limitations of the natural environment), more than 80% of the accommodation providers do. Moreover, 60% of commercial accommodation providers also specifically provide accessible room(s) with bigger room space for wheelchairs to manoeuvre, accessible bathrooms (with shower seat), ramps for wheelchair access, and hand railings. Commercial accommodations with less than 50 rooms tend to provide 1-2 accessible room(s), while properties with more than 50 rooms often provide 3-4 accessible rooms.

5.12 Landscape Quality and Conservation

5.12.1 Land-Use for Tourism Activities

The Margaret River Region has been growing not only as a nature-based tourism destination but also as one of the wine capitals of Australia. By 2019, over 5,800 ha of the region were under vines (2% of the total land in the region), as part of more than 200 wineries (MRWA, 2019). The land utilisation for vineyards and wineries has been growing from 2.8 hectares in 1967 to 5,840 hectares in 2019 (MRWA, 2019) with most of the producers boutique-sized businesses. Although the region produces just 2% of Australia's wine grapes, it provides 25% of the Australian premium wine market (MRWA, 2019).

Long before it was known as the wine capital of WA, the region was recognised as a summer holiday destination for intrastate travellers. As mentioned earlier, the region is characterised as a coastal area and a biodiversity hotspot, encompassing Geographe Bay, Cape Naturaliste and Cape Leeuwin as its landmarks. The region is rich in natural attractions (e.g., beaches, caves, forests, National Parks) and heritage sites (e.g., the Busselton Jetty, lighthouses), which host various water-based and adventure activities. The region's attractiveness has led to a rise in tourism demand and supply.

Based on the 'Local Tourism Planning Strategy' of the Shire of Augusta-Margaret River (2016, p. 46), there are three tourism zones in the Shire:

1. Tourist accommodation zone – contains a wide range of accommodation that must be compatible with the surrounding area. Hotels, motels and resort developments are encouraged;
2. Caravan park zone – includes caravan parks, camping grounds and limited chalet developments. These developments are low-cost, and preferably at beach-side and river-side locations; and
3. Chalet and camping zone – includes low-impact developments in rural-based areas comprising large natural vegetated areas.

Based on the City of Busselton Local Planning Scheme No. 21 (City of Busselton, 2020) tourism zones can be divided into (1) 'tourist zones', which are urban zones that

house all types of tourist-related developments, particularly accommodation, and (2) 'viticulture and tourism zones', which are intended to optimise the tourism potential created by viticultural activities. Other tourism activities, such as 'bed and breakfast', 'chalets', 'guesthouse' and 'winery' can also be found embedded in other zones where tourism is not the predominant use.

For decades, the tourism, viticulture and agriculture industries have been major contributors to the region's economy, which is also reflected in the land use of the region. The growth of tourism zones, which are concentrated within the rural areas near the coastline, is challenged by the simultaneous growth of viticulture and agriculture within the same area (Shire of Augusta-Margaret River, 2016). Thus, land utilisation conflicts between the sectors may arise.

5.12.2 Tourism Impacts on the Environment

The tourism sector in the Margaret River Region heavily relies on nature as the primary selling point for both, domestic and international tourists. As an internationally recognised biodiversity hotspot, tourism development in the region can be seen as a double-edged sword; even though it can be economically beneficial, it also can be environmentally and socially harming. Therefore, sustainable tourism development is crucial in maximising the economic, social and environmental benefits while lowering or even eliminating any harms. Although sustainable tourism development and practices have been an ongoing priority for the region for the past decades, neither the tourism nor the viticulture sector has fully implemented sustainable environmental practices (Shire of Augusta-Margaret River, 2017b).

The tourism sector and viticulture have proven to be important contributors to economic development and employment in the region. However, the expansion of tourism and viticulture activities also contributes to greenhouse gas emissions. Moreover, the expansion of land utilisation for tourism and viticulture activities can threaten habitat for wildlife and prevent ecosystem regeneration.

The Shire of Augusta-Margaret River (2016, p. 22), in the 'Local Tourism Planning Strategy', suggests possible impacts of tourism activities on environmental sustainability as shown in Table 9.

Table 9.

Tourism Activities' Impacts on Environmental Sustainability

Area	Positive Impacts	Negative Impacts
Biodiversity	<ul style="list-style-type: none"> Establishment of protected or conserved areas to meet tourist demands. Alternative economic and low impact use of land of conservation significance. 	<ul style="list-style-type: none"> Loss of habitat and change in species composition resulting from clearing of vegetation.
Erosion and physical damage	<ul style="list-style-type: none"> Tourism revenue to finance tourist infrastructure, ground repair and site restoration. Cleaning programmes to protect the attractiveness of location to tourists. 	<ul style="list-style-type: none"> Overloading of key infrastructure (e.g., water, power etc.) Water pollution, air pollution, noise pollution, littering.
Resource base	<ul style="list-style-type: none"> Development of new/improved sources of supply such as renewable energy, water recycling plants and educational programs. 	<ul style="list-style-type: none"> Depletion of ground and surface water. Consumption of local resources to meet tourist needs.
Visual/structural change	<ul style="list-style-type: none"> New uses for marginal or unproductive lands. Regeneration and/or modernisation of built environment. Reuse of disused buildings. 	<ul style="list-style-type: none"> Detrimental visual impact on natural and non-natural landscapes through tourism development. Land use conflicts between built environment and agricultural and sensitive land uses.

Note: Taken from the 'Local Tourism Planning Strategy' of the Shire of Augusta-Margaret River (2016, p. 22).

5.12.3 Policies and Actions

Policies to assist the environmental sustainability of tourism activities have been implemented by government agencies, local councils, tourism organisations and local communities, although more widespread participation of tourism enterprises is still desired. The policies and strategies adopted by the government agencies follow the 'Local Planning Tourism Strategy' by the local councils (City of Busselton, 2020; Shire of Augusta-Margaret River, 2016). The Local Planning Tourism Strategy of the Shire of Augusta-Margaret River (2016, p. 23) proposes that “new tourism developments should recognise the nature and impact of activities and encourage design that is responsive to, and protects the inherent values of the land; new tourism development

must ensure the protection of areas considered to be fragile, pristine or unable to sustain tourism development; tourism development located within the urban landscape is generally accepted as part of the existing built environment, albeit with local level amenity and infrastructure considerations; and tourist development in more remote and undeveloped areas of the Shire requires a more detailed level of environmental assessment before it may proceed”.

MRBTA, as the 'manager' of key attractions in the region, plays an important role in environmental protection which includes protecting its assets, the caves and lighthouses, the land that surrounds them and the wildlife and vegetation within. MRBTA also promotes a 'nature based tourism strategy', which will benefit the conservation goals. Meanwhile, a number of NGOs, such as the Margaret River Coastal Residents Association, Nature Conservation Margaret River Region, Friends of Redgate Beach, in collaboration with the local communities and councils, focus on rehabilitation and protecting the coastal area. The focus is particularly on beaches with high levels of tourist and resident usage to ensure that the dunes maintain a good cover of vegetation. A variety of activities including weeding, brushing, seed collecting, planting and rubbish removal are carried out.

6 CONCLUSION AND OUTLOOK

This is the first annual report of the Australia's South West Sustainable Tourism Observatory. It focused on exploring trends and actions in the key sustainability areas that are relevant for tourism development in the Margaret River Region, including tourism seasonality, employment, economic benefits, energy management, water management, waste management, regional cycles, inclusion and accessibility as well as landscape quality and conservation. Although the significance of implementing sustainable tourism practices is recognised among the tourism stakeholders and actions have been taken, there is still room for improvement in several areas. Selected key issues and areas for improvement for tourism development in the Margaret River Region include the following:

- Residents feel that tourism makes a strong economic contribution but they also suggest to closely monitor its impact on cultural and natural assets. Residents also support initiatives that maximise local benefits from tourism.
- In general, residents express strong support for close monitoring of tourism and its impacts.
- Although residents do not perceive overall visitation numbers as problematic, the lack of geographic dispersal is perceived to be a weakness of tourism development in the region.
- As in many leisure tourism destinations, seasonality is a challenge: Visitation is concentrated in the summer season, although the region offers diverse experiences that can be attractive in winter as well.
- Indications are that visitor satisfaction is generally high, but tends to be lower with accommodation and their facilities compared to other areas of the tourism service bundle.
- Participation of tourism and hospitality businesses in sustainable tourism practices in the region can be further increased.
- Some areas (such as energy and water consumption as well as regional cycles) require better data to enable an effective monitoring and subsequent evidence-based improvements.
- Perceptions of risks and measures during the COVID-19 pandemic are in continuous evolution. While the report provides snapshots collected at

particular points in time, it will be necessary to closely monitor the ongoing developments and associated changes in perceptions.

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