Annual Progress Report (2022/23)

Australia's South West

Sustainable Tourism Observatory:

Tourism for Regional Development in a Sensitive Environment

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We acknowledge that when in Perth we meet, work, and live on the land of the Whadjuk Noongar people. In the Margaret River Region, we are respectfully on the land of the Wardandi and Pibelmun Noongar people, and in the Bridgetown-Albany region on the land of the Kaniyang, Koreng and Menang Noongar people. We pay respect to Elders, past and present, and acknowledge the important role Aboriginal and Torres Strait Islander People continue to play in caring for country across Western Australia. We acknowledge the Traditional Owners of this country and their continuing connection to land, waters and community.

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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.

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LIST OF ABBREVIATIONS

Abbreviation	Meaning
ABS	Australian Bureau of Statistics
ASW	Australia's South West
ASWTO	Australia's South West Sustainable Tourism Observatory
BITRE	Bureau of Infrastructure and Transport Research Economics
DBCA	Western Australia's Department of Biodiversity, Conservation and Attractions
GDP	Gross Domestic Product
GRP	Gross Regional Product
GSDC	Great Southern Development Commission
INSTO	International Network of Sustainable Tourism Observatories
ILO	United Nations International Labor Organization
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
WTTC	World Travel and Tourism Council

EXECUTIVE SUMMARY

The tourism industry plays a pivotal role in economic growth and diversification, contributing 6.1% of the global GDP and generating 289 million jobs worldwide in 2021 alone (WTTC, 2022). 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 and Australia's South West (ASW). It does so to support the formulation and implementation of sustainable tourism policies, strategies and management processes.

This report focuses on the Australia's South West Tourism Region (ASW). The ASW is one of the most visited tourism regions within WA and comprises twelve local government areas, including the Shire of Augusta-Margaret River, the City of Bunbury and the City of Busselton, among others. The region covers an area of approximately 24,000 km^2 with 184,516 inhabitants. The region consists of more than 1,000 km of coastline and it is home to 24 national parks, towering forests and agriculturally rich land. With such an abundance of natural attractions, the implementation of sustainable practices across all tourism activities is of paramount importance to preserve the region's natural beauty and tourism viability.

Observations for key sustainability areas:

Seasonality

- The region receives 3.2 million overnight visitors and 4 million day-trip visitors per year with domestic visitation dominating. The main purposes of visitation are holiday and visiting friends and relatives.

- The occupancy rates of commercial accommodation in the Margaret River Region remained relatively constant between 2014 and 2022, oscillating between 58% and 61%, except for 2020, the year of the initial COVID-19 outbreak.
- Being predominantly a summer destination, accommodation providers' occupancy rates peak at 60%-70% in January to December. The quietest months with approximately 45% occupancy include June and August (winter).
- Visitation numbers to the Cape-to-Cape Track are relatively stable. Cape Naturaliste Point recorded the highest visitation on average during 2017-2022 with 26,337 visitors on average per annum.

Employment

- There are more than 2,700 tourism enterprises in the Australia's South West Tourism Region, more than half of which are classified as employing businesses.
- The tourism industry in the region generates approximately 8,887 positions of direct employment, that is 9.2% of the region's total employment, and is accounting for 6% of its wages.

Destination economic benefits

- In the Australia's South West Region, the tourism industry generates 7.3% of the region's total Gross Value Added (GVA) and 7.9% of its total Gross Regional Product (GRP), i.e. around 24% of the total tourism GVA and GRP in Western Australia.
- In 2022, tourists spent an average of $113 per night (international visitors) to $197 per night (domestic visitors).
- The average daily rate (ADR) and revenue per available room (RevPAR) of commercial accommodation in the region were $227 (2021) / $232 (2022, until October) and $135 (2021) / $140 (2022, until October) respectively.

Resident 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 with a tendency towards too many tourists.
- An area of concern is the concentration of tourists in a few hotspots.
- Residents strongly support initiatives to monitor tourism impacts and to strengthen local benefits of tourism.

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 a 17% and 11% reduction between 2017-2018 and 2020-2021 respectively. Decrease of water consumption in hotels is 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

- Sustainable waste management in the region follows the guidelines of 'The Waste Avoidance and Resource Recovery Strategy 2030' by the WA Waste Authority.
- The region's local government authorities promote waste reduction initiatives, such as installing water refill stations at events and educating the business community about waste improvement and recycling efforts.
- 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, providing recycling bins and encouraging staff and visitors to waste reduction and recycling.

Inclusion and accessibility

- The Shire of Augusta-Margaret River, within the Australia's South West tourism destination, has been recognised for the accessibility of its offers; however, experts claim there is scope for improving travel accessibility in the region in several areas including communication and business capacity.
- Observed satisfaction levels among visitors with disabilities in ASW raise some concerns regarding accessibility in travel as 54% indicated tourism offerings in the region were either somewhat inaccessible or not accessible at all.

1. INTRODUCTION

1.1. UNWTO-INSTO

The tourism industry is one of the world's most important industries, contributing 6.1% to the global GDP and generating 289 million jobs worldwide in 2021 alone (WTTC, 2022). 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 May 2023, there are a total of 37 observatories in operation worldwide (Figure 1).

Figure 1. International Network of Sustainable Tourism Observatories

Note: This map represents the distribution of a total of 34 observatories in the UNWTO INSTO Network (as of May 2023), including the ASWTO. Copyright by UNWTO-INSTO, 2023.

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 3.19 million overnight visitors in 2021 (Tourism WA, 2022). 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

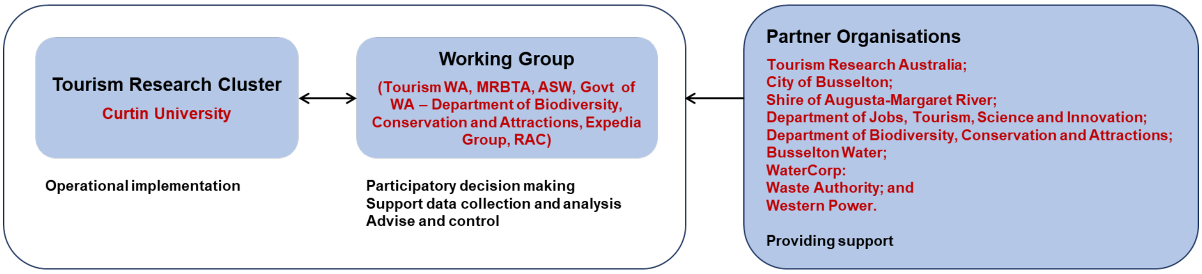
ASW region is broken into four sub-regions: Bunbury Geographe, the Margaret River Region, Southern Forests and Valleys, and the Great Southern Region.

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.

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) and the Royal Automobile Club of Western Australia (RAC).

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 (2017-2021). 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://research.curtin.edu.au/businesslaw/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 (Table 1) 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	TRA, ABS, REMPLAN
3.	Destination economic benefit	Tourism economic contribution	Secondary	TSA, ABS, REMPLAN
		Tourist spending	Secondary	NVS-IVS, TWA
		Accommodation daily rates and revenue per available room	Secondary	STR, TWA
4.	Resident satisfaction	Resident satisfaction	Primary	Resident survey
5.	Energy management	Regulations and actions to manage energy consumption in the tourism industry	Secondary	Western Power, Synergy, Local Shires

No.	Key Issue Areas	Indicators	Type of Data	Sources
		Energy consumption	Secondary	Western Power, Synergy
6.	Water management	Regulations and actions to manage water consumption in the tourism industry	Secondary	WaterCorp, Busselton Water
		Water consumption	Secondary	WaterCorp, Busselton Water
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.	Inclusion and accessibility	Stakeholder perspectives	Primary	Expert interviews
		Visitor experience	Primary	Visitor survey

2.1.1. Primary Data Collection

For the primary data collection, the Observatory focused on resident satisfaction, stakeholder perspectives on travel accessibility and experiences of visitors with disabilities in the Australia's South West Tourism Region.

Resident satisfaction: The resident satisfaction survey was conducted online. The objective was both to identify average satisfaction levels of residents with the region's tourism development and to detect eventual early warning signals. We have conducted three survey waves (2020, 2021 and 2022).

Stakeholder perspectives on travel accessibility: The in-depth interviews were conducted online and followed a semi-structured format with open questions. The objective was to capture the outlooks of service providers from a range of different backgrounds. We interviewed accessibility consultants, shire community coordinators, member for parliament representatives and tourism providers in the region.

Experiences of visitors with disabilities: The visitor experience survey was conducted online and targeted people with disabilities who had previously travelled to the study region or would consider travelling there in the future. The objective was to collect information on travel behaviour and experiences/perceptions of disabled visitors' travel in the region.

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 (2022) include the performance of 26 commercial accommodation providers in the Australia's South West Tourism Region. Accommodation providers included in the dataset range from 'Economy Class' (i.e., budget) to 'Luxury Class'.

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 Australia's South West Tourism Region are the result of the consolidation of data from the South West and the Great Southern regions.

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.

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 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 ASW. 2. Analysis of annual distribution and growth rate.
Seasonality	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in ASW. 2. Analysis of monthly distribution.
Accommodation occupancy rate	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in ASW. 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 ASW. 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 Australia's South West Region. 2. Analysis of distribution/frequency.

Indicators	Analysis Method	Description
Tourist spending	Quantitative descriptive analysis	1. Combination of data sets from multiple LGAs in the Australia's South West 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 Australia's South West region. 2. Analysis of monthly distribution and annual growth rates.
Resident 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.
Energy management		
Regulations and practices	Qualitative content analysis	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	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	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.
Waste Generation	Quantitative descriptive analysis	Analysis of annual waste generation (weight) across different councils.
Inclusion and accessibility		
Stakeholder perspectives	Qualitative content analysis	1. Identification of key themes concerning the current state of travel accessibility in ASW. 2. Identification of paths forward to enhance travel accessibility.
Visitor experience	Quantitative descriptive analysis	Descriptive analysis of travel experience in the region among visitors with disabilities.

3. DESTINATION PROFILE: THE AUSTRALIA'S SOUTH WEST TOURISM REGION

3.1. History

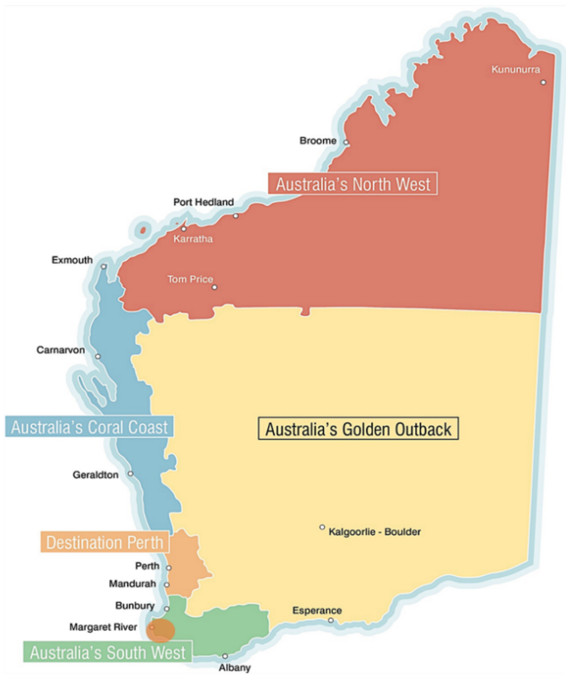
Wadandi and Bibbulmun people have been living in the Australia's South West for at least 50,000 years and exert a strong influence on the region. The modern history of the region took a sudden turn with the arrival of early colonial settlers in the first half of the 19th century. European settlement 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 vignerons sparked a renewed interest in the Margaret River Region, which has continued to this day.

3.2. Socio-Geographic Profile

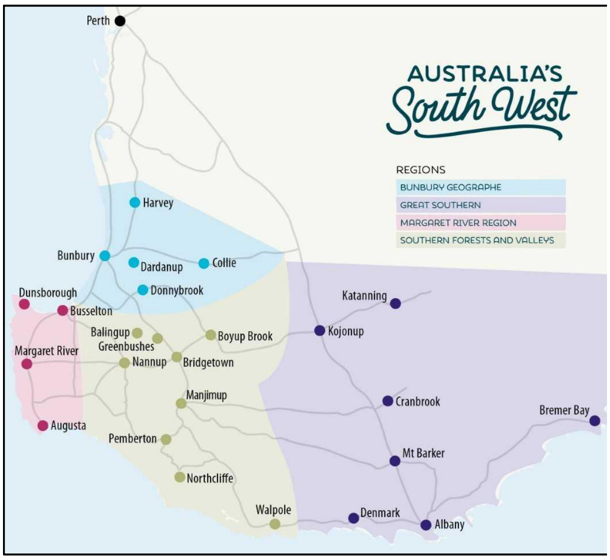
ASW is one of five geographically demarcated tourism regions within Western Australia (see Figure 3), besides 'Destination Perth', 'Australia's Golden Outback', Australia's Coral Coast and 'Australia's North West' (Pforr, 2007; Pforr, Pechlaner, Volgger and Thompson, 2014). ASW is divided into the Bunbury Geographe, Great Southern, Margaret River Region and Southern Forests and Valleys (Figure 4).

Figure 3. Map of the Western Australian Tourism Regions



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

Figure 4. Map of Australia's South West Tourism Region

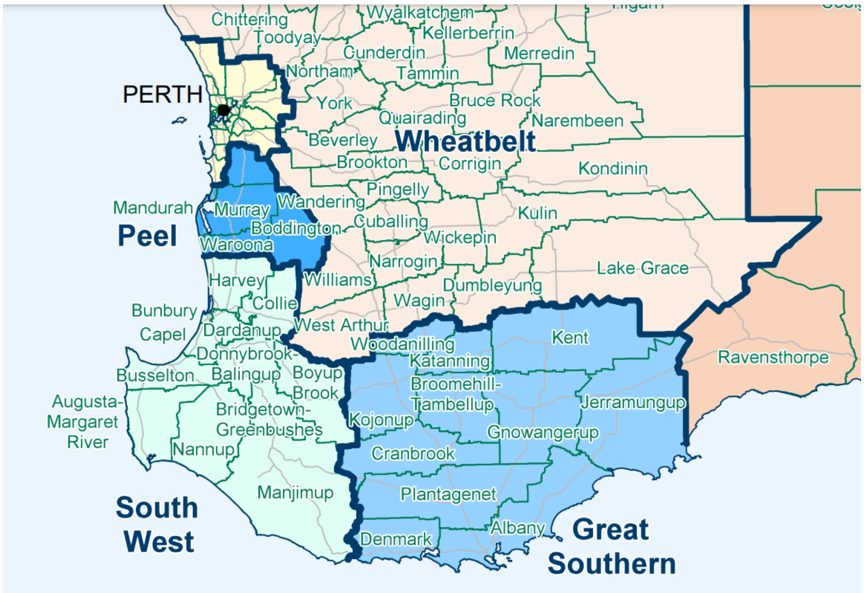


Note: This map represents the four tourism subregions of ASW. Copyright by ASW, 2022.

The Australia's South West Tourism Region is characterised as a coastal area, encompassing Geographe Bay, Cape Naturaliste and Cape Leeuwin. Towards the south, the Stirling and Porongurup ranges also shape its geography. The region also includes IUCN category sites, such as the Leeuwin-Naturaliste National Park (191 km^2) and the Ngari Capes Marine Park (1,238 km^2). 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.

REMPLAN presents data for the two development regions that greatly overlap with the Australia's South West Tourism Region: the South West and the Great Southern (see Figure 5).

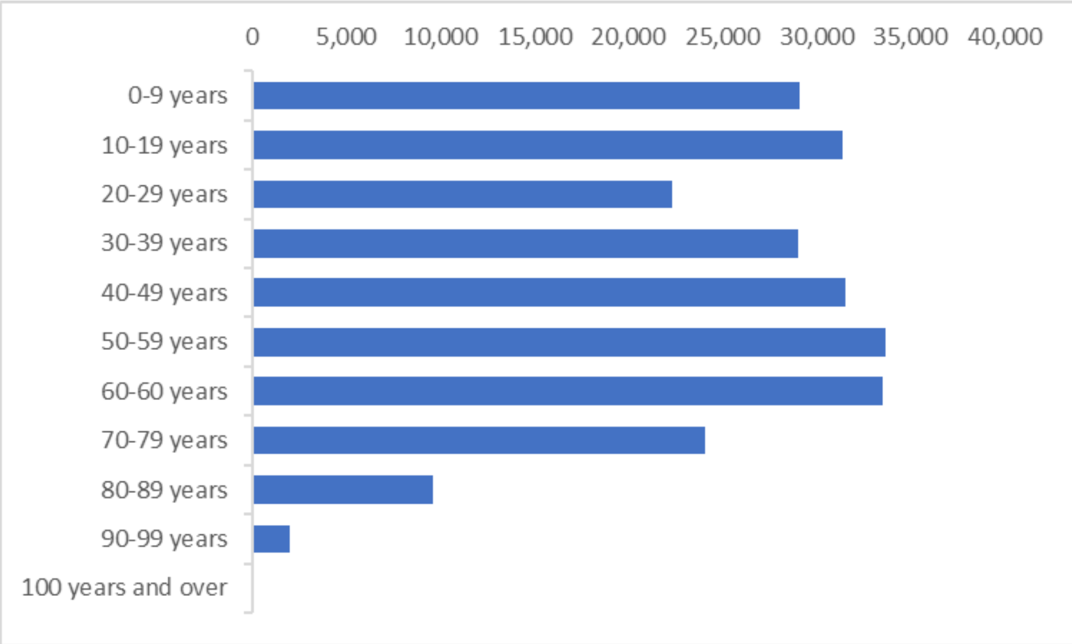
Figure 5. Map of the South West and Great Southern Development Regions



Note: *Adapted from Tourism WA (2020).*

Based on the Australian Bureau of Statistics 2021 Census of Population and Housing, the ASW has a population of approximately 254,600 inhabitants (190,637 in the South West and 63,963 in the Great Southern). The population is concentrated in the major town centres of Busselton, Margaret River, Albany, Dunsborough and Augusta. The region's population accounts for 9.3% of the total population in Western Australia. The population distribution by age in Figure 6 displays that the ASW exhibits a gap in the age groups between 20 and 29 years old.

Figure 6. Population by Age in the Australia's South West Tourism Region



Note: The aggregated population of the South West and the Great Southern regions. Based on the Australian Bureau of Statistics 2021 Census of Population and Housing, in collaboration with REMPLAN (2022a, 2022c). Own elaboration and illustration.

3.3. Economic Profile

The Australia's South West has an approximate Gross Regional Product (GRP) of $20.1 billion with the South West contributing $15.461 billion and the Great Southern $4.597 billion in 2021 (REMPLAN, 2022a, 2022c). Considering the population figures, the GRP per capita is $78,782 in the region, while the State's per capita GRP is around $131,556 (REMPLAN, 2022d).

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 Australia's South West generates an estimated $44.6 billion in economic output. This number represents 6.6% of the output generated in Western Australia (REMPLAN, 2022a, 2022c, 2022d).

The largest contributors to the Australia's South West Region economy are Albany ($5.713 billion) and Augusta-Margaret River ($2.328 billion) (REMPLAN, 2022a, 2022c). Meanwhile, the activities that contribute the most to the regional output are manufacturing ($9,344.1 million), construction ($6,296.1 million) and mining ($4,770.5 million). Accommodation and food services account for 3.1% of the region's economic output with a total $1,369.1 million.

Last, there are an estimated 107,296 jobs in the Australia's South West Tourism Region which account for 8.2% of total jobs in Western Australia. Around 75% of these jobs are in the South West region and 25% in the Great Southern region (REMPLAN, 2022a, 2022c, 2022d).

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 7 provides a simplified graphical representation of this structure.

Figure 7. 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 THRIVE 2030 strategy. He strategy focuses on returning the tourism sector to pre-pandemic visitor spend and sustainable growth (Austrade, 2023). Its specific targets are returning visitor spend to $166 billion by 2024 and growing it to $230 by 23030 (Austrade, 2023).

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 “Walking on a dream”, 2) to sponsor major events to attract visitation, and 3) to facilitate major tourism infrastructure and investment (Tourism Australia, 2011; Tourism WA, 2018). A new tourism strategy is currently being developed.

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.

There are other local tourism organisations operating in the region, including the Bunbury Geographe Tourism Partnership, Southern Forests and Valleys Tourism, and the Great Southern Tourism and Trade Partnership.

The South West Development Commission (SWDC) and the Great Southern Development Commission (GSDC) are part of the Western Australian State Government. These organisations aim to aid in the development of the Australia's South West tourism 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 and GSDC's priority areas. Key focus areas in relation to tourism include trade and investment facilitation, market and consumer insights, and regional growth opportunities.

ASW, SWDC, GSDC and the local tourism organisations (such as MRBTA) 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 tourism marketing, SWDC and GSDC concentrate on economic development.

Finally, there are 23 local government areas (**cities and shires**) in the ASW: 12 are in the South West and 11 in the Great Southern. Among these are the City of Albany, the City of Busselton, the Shire of Augusta Margaret River, the Shire of Denmark and the Shire of Manjimup. They are in charge of providing resident amenity services such as waste management as well as approvals related to land use and development. **Tourism businesses and operators** can also be allocated at this level and include tourism-related private sector commercial initiatives.

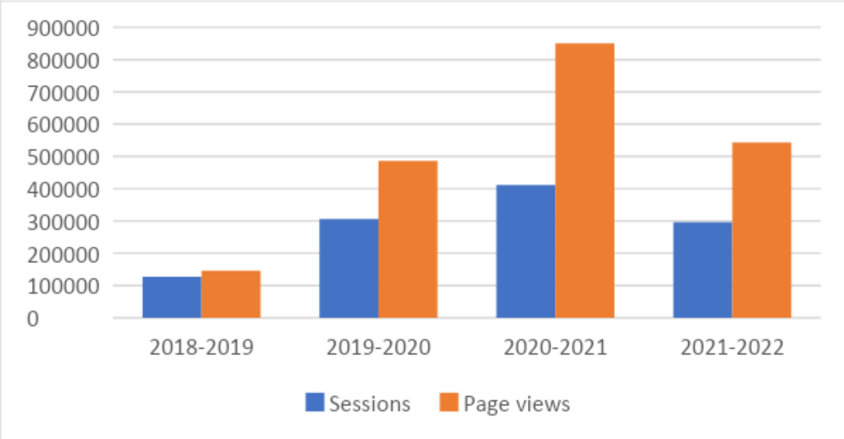
13.5 Marketing and promotion in the Australia's South West Tourism Region

Australia's South West, the Regional Tourism Organisation of the Australia's South West Tourism Region, is a crucial institution in the area. Its vision is "for Australia's

South West to be a leading, prosperous and sustainable tourism destination" while its purpose is based upon being "an inspirational destination marketing leader that supports and facilitates a dynamic and collaborative tourism destination" (ASW, 2019).

Marketing and promotion are one of the Australia's South West's strategic themes. In this regard, the organisation has a website (www.australiassouthwest.com), a Facebook page (www.facebook.com/AustraliasSouthWest) and an Instagram account (www.instagram.com/australias_southwest). "Total sessions" (website interactions within 30 minutes) and page views on the Australia's South West website have been growing between 2018-2019 and 2020-2021, and declined in the period 2021-2022 (Figure 8). In 2020-2021, the peak reached 411,554 sessions and 850,629 page views.

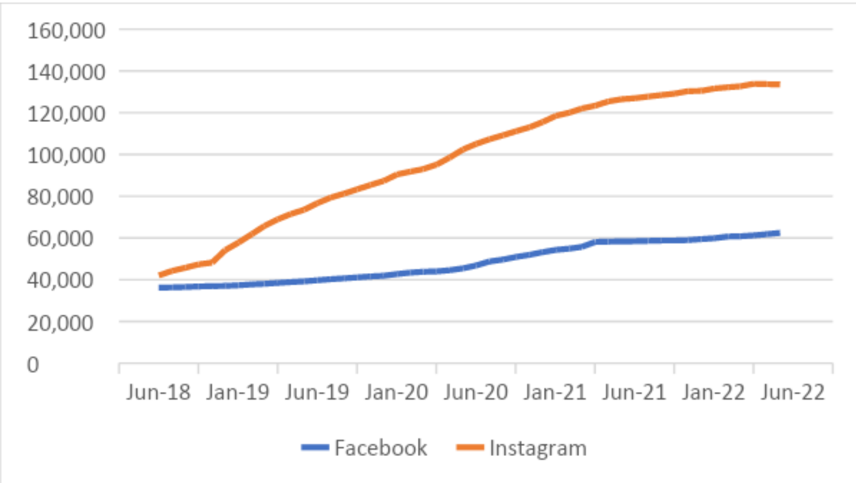
Figure 8. Total Sessions and Page Views in the Australia's South West Website



Note: Based on the Big Head Digital Australia's South West Report, in collaboration with ASW (2022). Own illustration.

The total number of followers has been growing non-stop both on Facebook and Instagram, according to data for July 2018 – June 2022 (Figure 9). Figures for June 2022 indicate a total of 62,444 followers on Facebook and 133,502 followers on Instagram. The average rate of growth was higher on Instagram (2.5%) than Facebook (1.1%).

Figure 9. Facebook and Instagram Total Followers of the Australia's South West



Note: Based on Facebook Insights and Iconosquare analytics, in collaboration with ASW (2022). Own illustration.

3.5. Tourism Profile

As highlighted earlier, the Australia's South West Tourism 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., 20+ national parks, caves, forest, coastline, mountains and rocks)
- Adventure activities (e.g., Cape to Cape hiking track, 4x4 driving, diving, whale watching, cycling and mountain biking)
- Heritage sites (e.g., Busselton Jetty, lighthouses, Albany's Historic Whaling Station, National ANZAC Centre)
- Events (e.g., Gourmet Escape, Truffle Kerfuffle, sporting events)

There is a diverse calendar of events throughout the year, which is championed by key events such as the Gourmet Escape and Truffle Kerfuffle 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.

ASW has organised the branding and communication of tourism products around four sub-regions (ASW, n.d.): (1) 'Bunbury Geographe', (2) 'Margaret River Region', (3) 'Southern Forests and Valleys' as well as (4) 'Great Southern'.

Region 1: Bunbury Geographe

The Bunbury Geographe includes Harvey Region, Bunbury, Dardanup and the Ferguson Valley, Capel Region, Collie, Donnybrook and Balingup. Some highlights in the region include its cafes, local produce and wines, as well as its vibrant art and festivals.

Region 2: Margaret River Region

The Margaret River Region includes Busselton, Dunsborough, Yallingup, Cowaramup, Margaret River and Augusta. Some highlights in the region include its wines and wider local produce, the coast and surf, its nature and wildlife and an active events agenda.

Region 3: Southern Forests and Valleys

The Southern Forests and Valleys include Greenbushes, Bridgetown, Nannup, Boyup Brook, Manjimup, Pemberton, Northcliffe, Walpole, Windy Harbour and Nornalup. Some highlights in the region include its forests, rivers and coast, local produce and wines, and flowers.

Region 4: Great Southern

The Great Southern includes Bremer Bay, Kojonup, Katanning, Broomehill Village – Tambellup, Cranbrook and Frankland River, Gnowangerup and Stirling Range, Porongurup, Pingrup, Albany, Mount Barker and Denmark. Some highlights in the region include its stunning coast, local produce and wines, forests and mountains.

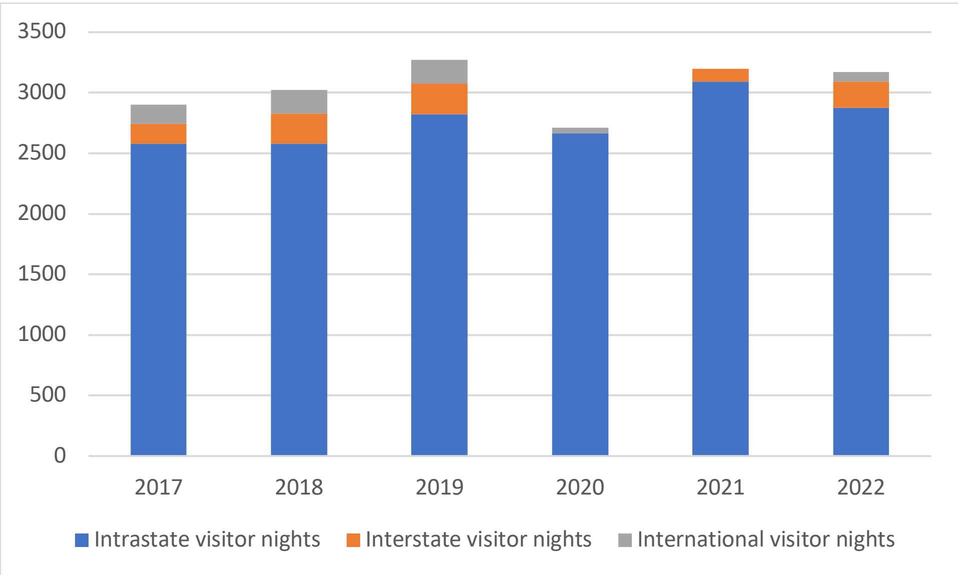
4. KEY SUSTAINABILITY AREAS

4.1. Tourism Seasonality

4.1.1. Visitation Overview

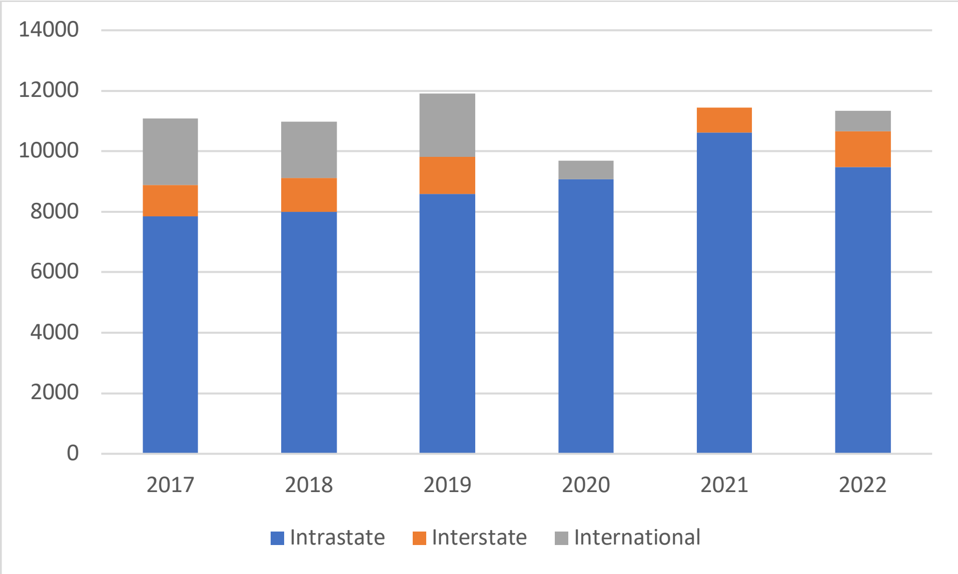
The Australia's South West Tourism Region represents less than 3% of Western Australia's territory and around 9% of the state's population. Despite its relatively small size compared to the state overall, the region is crucial for tourism. In 2021, it accounted for 24% of Western Australia's 48.6 million visitors nights and accommodated 3.2 million annual overnight visitors. In 2022, the region accounted for 19% of Western Australia's 61.1 million visitors nights and again accommodated 3.2 million annual overnight visitors (Figure 10, Figure 11, Table 3).

Figure 10. Visitation to the Australia's South West Tourism Region (000s)



Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2023b). Own illustration.

Figure 11. Visitor Nights in the Australia's South West Tourism Region (000s)



Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2023b). Own illustration.

Table 3. Average Length of Stay (Nights)

	Average length of stay (nights)					
	2017	**2018**	**2019**	**2020**	**2021**	**2022**
Intrastate	na	3	3	3	3	3
Interstate	na	4	5	na	8	5
International	na	10	11	13	na	8

Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2023b). Own table.

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

- Daytrip and intrastate tourists are the dominant market segments. In 2021, they reached 3.4 and 3.1 million visitors, respectively. In 2022, they reached 4 and 2.9 million visitors, respectively;
- While intrastate visitor figures decreased by 6% from 2019 to 2020, intrastate visitor nights increased by 6%; meanwhile, both intrastate visitors and nights increased (by 16% and 17%, respectively) from 2020 to 2021 and then decreased (by 7% and 11%) from 2021 to 2020;
- With a total of 193,000 visitations in 2019, international tourists form the smallest segment and experienced considerable decay with COVID-19, with

47,000 arrivals in 2020. These visitations are slowly recovering with 79,000 visitors in 2022;

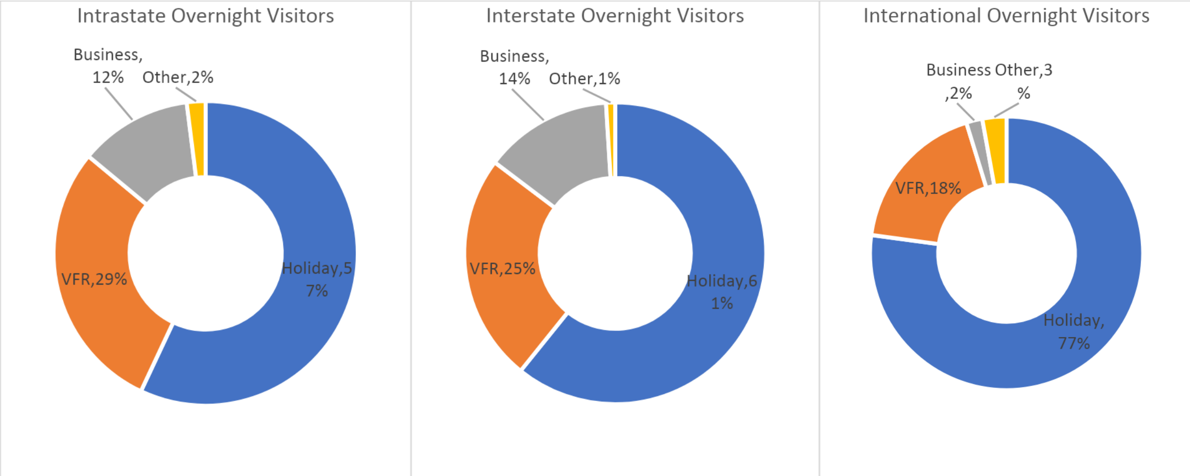
- 256,000 interstate overnight tourists visited the region in 2019, a figure that grew by 56% from 2017. This figure decreased with the pandemic and is recovering with 217,000 interstate overnight tourists in 2022; and
- compared to domestic tourists, with an average length of stay of 3 to 5 nights, international tourists stayed for an average of 8 nights in 2022.

Domestic tourism is very relevant for the Australia's South West Tourism Region. According to the National Visitor Survey from Tourism Research Australia (TRA, 2020, 2021a, 2022), the Australia's South West is among the top 15 tourism regions in the country in terms of domestic tourist nights. In fact, it ranked 13th in 2019, and climbed to the 9th position in 2020 and 2021.

Meanwhile, international visitors account for 6% of total overnight visitation, and 18% of all visitor nights, with key markets including the UK, Singapore, Malaysia, USA, New Zealand, China, Hong Kong, Germany, Japan, Switzerland, Indonesia and India (ASW, 2019). Targeting the high-value Asian markets has been a key focus of the region's growth strategy (Volgger et al., 2018).

Looking at the profile of tourists visiting the Australia's South West Tourism Region, most of these visit the region for holiday purposes: 57% of intrastate visitors, 61% of interstate visitors and 77% of international visitors travel for this reason. The second most important travel motive is to visit friends/family, with a share that oscillates between 29% for intrastate and 18% for international visitors. Last, business purposes are also relevant, especially for intrastate (12%) and interstate (14%) visitors (see Figure 12).

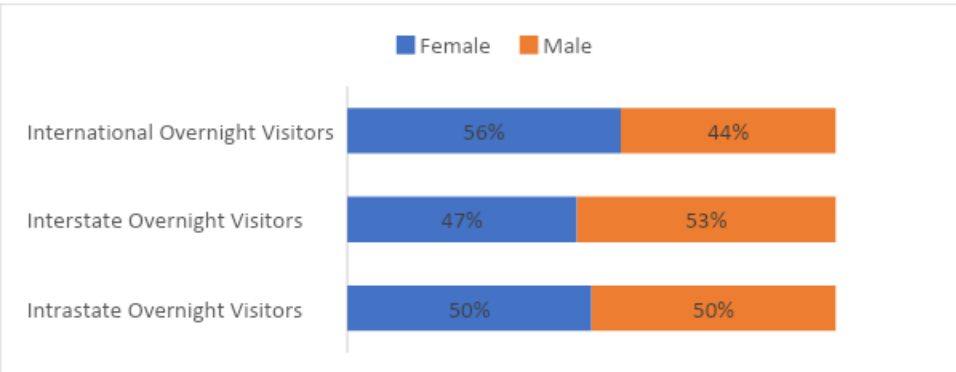
Figure 12. Purpose of Visitation to the Australia's South West Tourism Region (2018-2019)



Note: VFR stands for Visiting Friends/Family. Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2022). Own illustration.

While 53% of the interstate overnight visitors to the region are male, females dominate the international market with a share of 56%. Gender participation is equal (50% each) among intrastate overnight visitors (see Figure 13).

Figure 13. Gender of the Visitors to the Australia's South West Tourism Region (2018-2019)

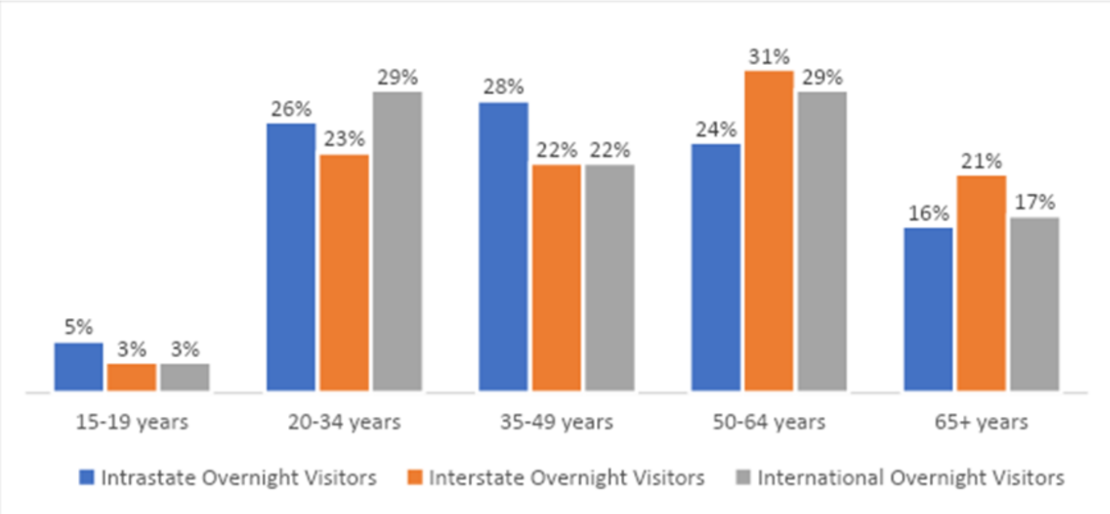


Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2022). Own illustration.

Visitation is diversified across the various age groups, with visitors aged between 20-34 being slightly more relevant and accounting for 29% of the international market.

Meanwhile, visitors between 50-64 are prominent among interstate visitors and those between 35-49 are dominant in the intrastate market (Figure 14).

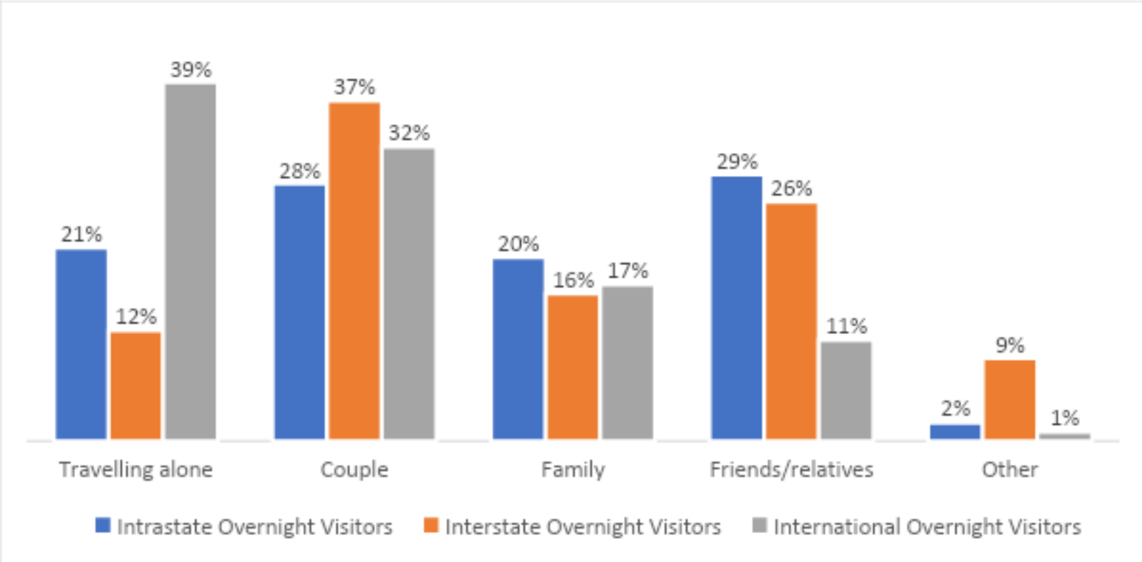
Figure 14. Age Groups of the Visitors to the Australia's South West Tourism Region (2018-2019)



Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2022). Own illustration.

Regarding travel parties, we can assess the predominance of travel party types for each visitor market. Among international tourists, unaccompanied travellers (39%) are predominant. Meanwhile, couples (32%) dominate among interstate domestic tourists. Last, intrastate tourists present a large proportion of groups of friends/relatives (29%) and couples (28%) (Figure 15).

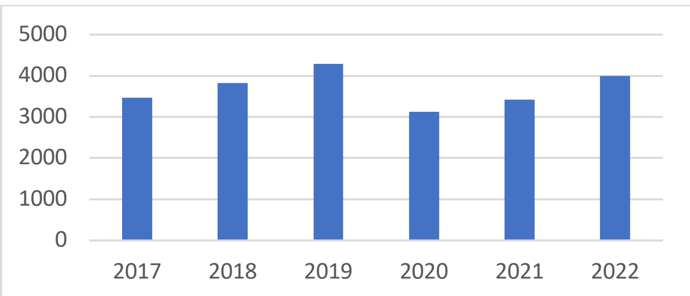
Figure 15. Travel Party of the Visitors to the Australia's South West Tourism Region (2018-2019)



Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2022). Travel party participation calculated within each visitor market. Own illustration.

Daytrip visitation contributed 57% of the total visitation to the Australia's South West Tourism Region in 2019, reaching 4.3 million visitors and growing by 12% in relation to the previous year. The latest figures show daytrips have been recovering after the pandemic, with 3.1 million visitors in 2020, 3.4 million in 2021 and 4 million in 2022 (Figure 16). According to the National Visitor Survey from Tourism Research Australia (TRA, 2020, 2021a, 2022), the Australia's South West is in the top 15 among tourism regions in the country in terms of day visitors. In fact, it ranked 15th in 2019, then 14th in 2020 and 12th in 2021.

Figure 16. Daytrip Visitation in the Australia's South West Tourism Region (000s)



Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2023b). Own illustration.

Table 4 below summarises the tourist visitation trends to the Australia's South West Tourism Region during the period from 2017 to 2022.

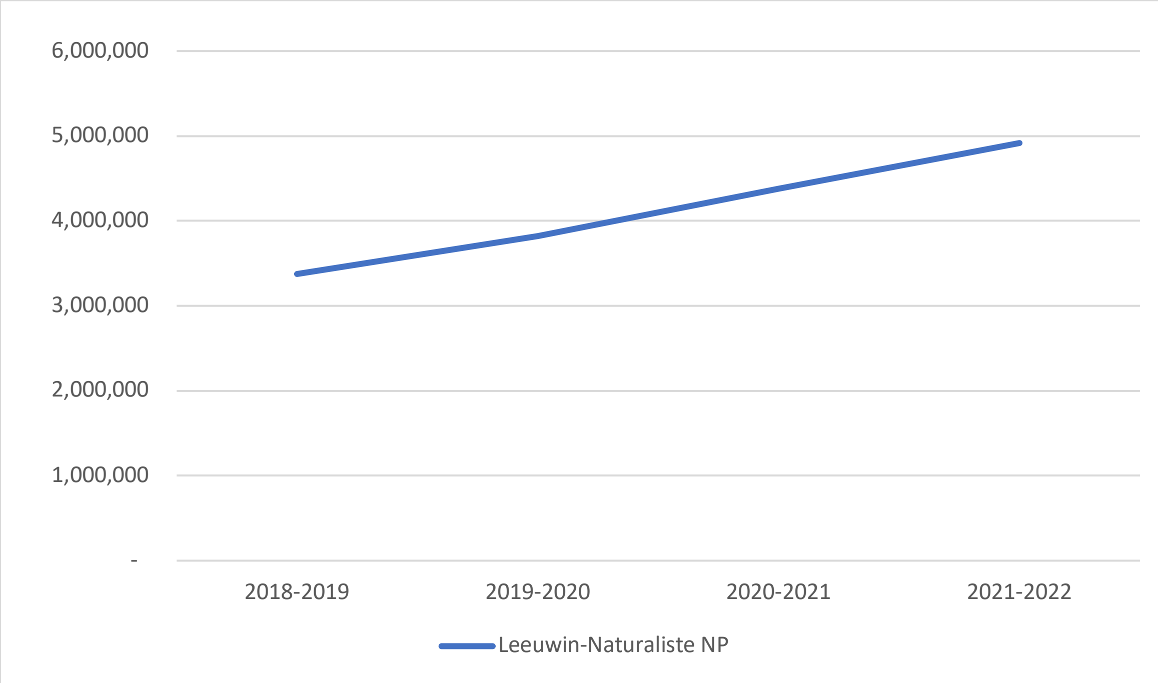
Table 4. Overview on Tourist Visitation to the Australia's South West Tourism Region

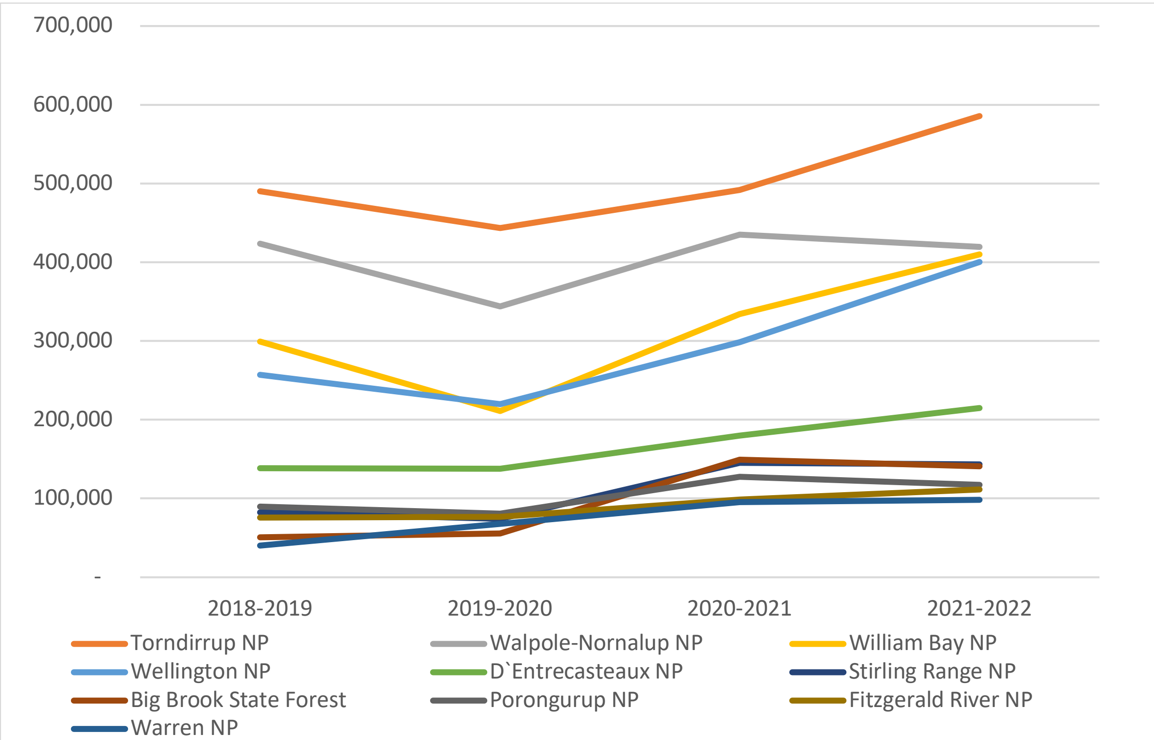
	Visitors (000s)					
	2017	**2018**	**2019**	**2020**	**2021**	**2022**
Intrastate Overnight Visitors	2577	2579	2820	2663	3093	2877
Interstate Overnight Visitors	164	250	256	na	102	217
International Overnight Visitors	158	195	193	47	na	79
Total Overnight Visitors	**2899**	**3024**	**3269**	**na**	**na**	**na**
Daytrip Visitors	3469	3816	4282	3121	3421	3992
Total Visitors	**9267**	**9864**	**10820**	**na**	**na**	**na**

Note: Based on the TRA – IVS and NVS 2017-2021, in collaboration with Tourism WA (2023b). Own illustration.

The Australia's South West Tourism Region is home to 40+ parks, including national, regional, conservation and marine parks, as well as nature reserves and state forests. DBCA visitation statistics to some of these show the prominence of Leeuwin-Naturaliste National Park, home to the Cape Naturaliste and stunning beaches. Visitation figures have been growing non-stop in this park at an average annual rate of 13% and almost reaching 5 million visitors in 2021-2022 (Figure 17). Other important National Parks in terms of visitation include Torndirrup, Walpole-Nornalup, William Bay and Wellington. These received between 400,000 and 600,000 visitors in 2021-2022.

Figure 17. Visitation at Parks in the Australia's South West Tourism Region





Note: Figures do not represent total use. Elaborated and reported by DBCA WA (2022). Own illustration.

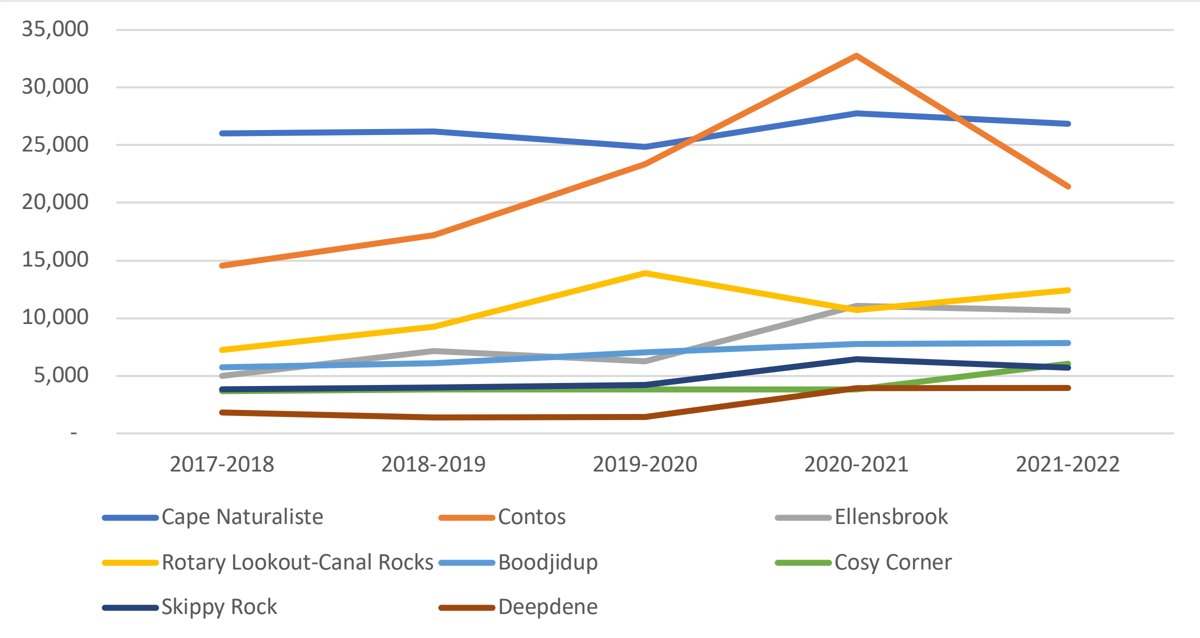
Hiking is highly popular for visitors in the Australia's South West, and different trails can be found. The Cape-to-Cape Track represents probably the most famous walking trail in the region. It runs for 135 kilometres along the ridge and the beaches of the Leeuwin-Naturaliste National Park (see Figure 18). The Cape-to-Cape Track is managed by the Department of Biodiversity, Conservation and Attractions under the Parks and Wildlife Service.

Figure 18. Map of the Cape-to-Cape Track in the Australia's South West Tourism Region

Note: Copyright of Busselton Jetty Tourist Park (2018).

As can be seen from Figure 19 below, visitation to the track has been relatively stable over the years. Cape Naturaliste Point recorded the highest visitation on average during 2017-2022 with on average per annum. While it was the absolute most visited destination for most of the years with data available, visitation at Contos counter was higher in 2020-2021 when it reached a peak of 32,764 passes. The highest average annual growth during 2017-2022 was recorded by the least visited counter, Deepdene (38%).

Figure 19. Cape-to-Cape Track Visitation at Selected Monitoring Locations at the Leeuwin-Naturaliste National Park



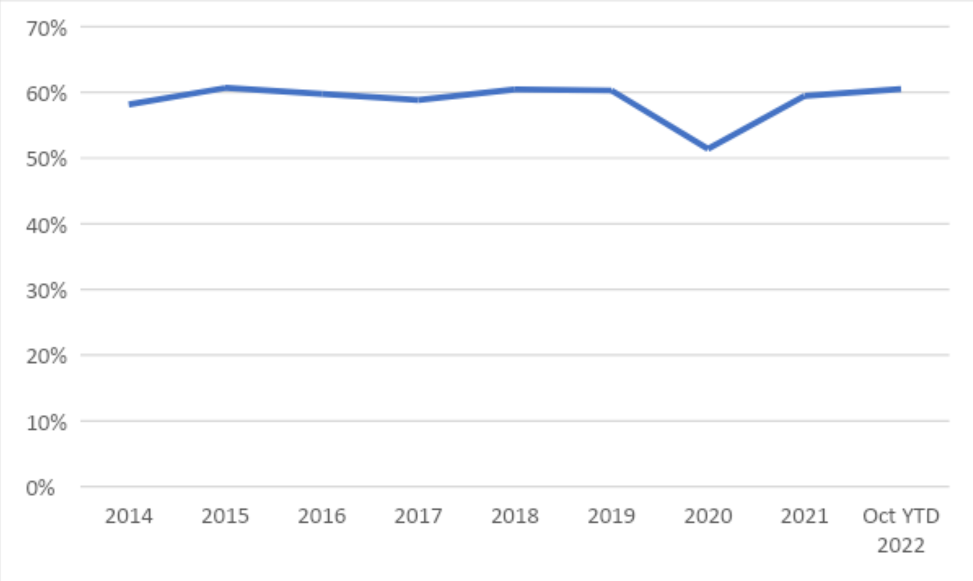
Note: Data represents visits/detected activities where a person passes a specific point on the track and is not intended to represent total visitation. Some of the variations in visitation/activity may be due to temporary closures and deviations due to maintenance and/or fires. Elaborated and reported by DBCA WA (2022). Own illustration.

4.1.2. 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 the long-term viability and diversity of amenities, accommodation and attractions, employment opportunities and resident satisfaction. The visitation rate to the Australia's South West Tourism 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, between June and August. Visitation slightly increases in July during school holidays.

Based on data from STR (2022), the occupancy rates of commercial accommodation in the Australia's South West Tourism Region have remained relatively constant in the period 2014-Oct 2022. Occupancy rates oscillated between 58% and 61% during this period, except for 2020, the year of the COVID-19 outbreak, when they dropped slightly to 51% (Figure 20).

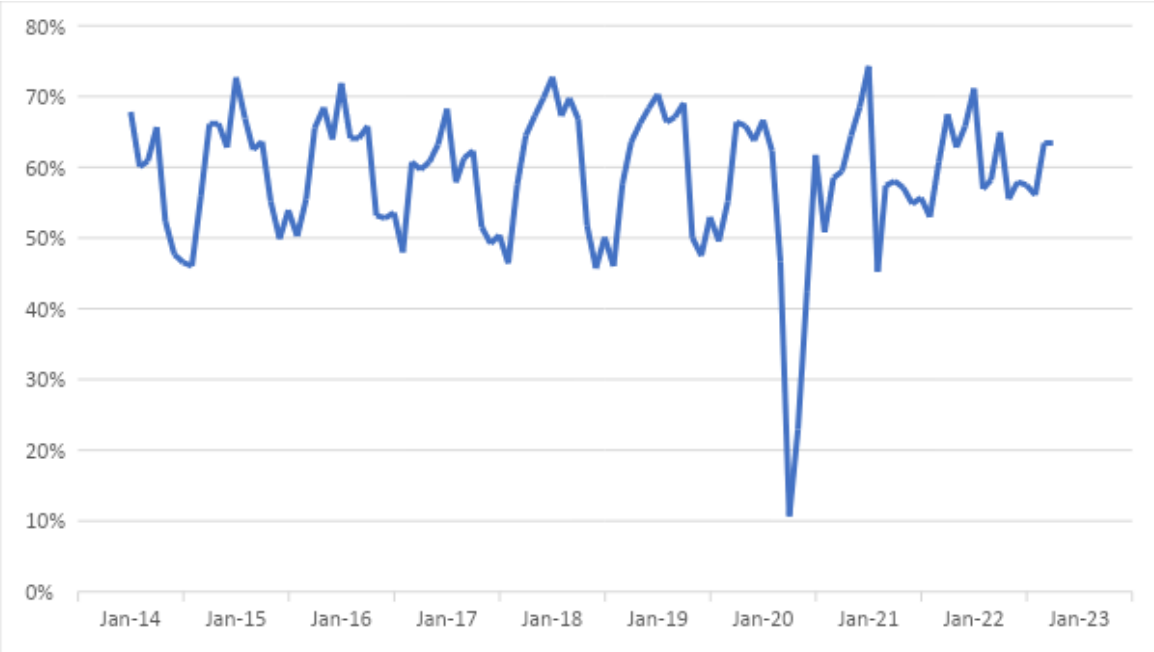
Figure 20. Annual Average of Occupancy Levels Among Selected Commercial Accommodation Providers in the Australia's South West Tourism Region, 2014 – October 2022



Note: The figure is based on a sample of commercial accommodation providers in the Australia's South West Tourism Region. Based on the STR (2022) – Trend Report of Australia's South West, Western Australia. Own analysis and illustration.

The occupancy rates in accommodation within the region fluctuate between 60%-70% in peak periods, such as December and January (summer and school holidays), and around 50% in off-peak periods such as June and August, at the beginning and the end of the winter season (STR, 2022; see Figure 21), except for the atypical, COVID-19 triggered winter season in 2020. Since mid-2021 there seems to be a trend to a diminished fluctuation between peak and off-peak, which is mainly to slightly increased occupancy rates in the off season.

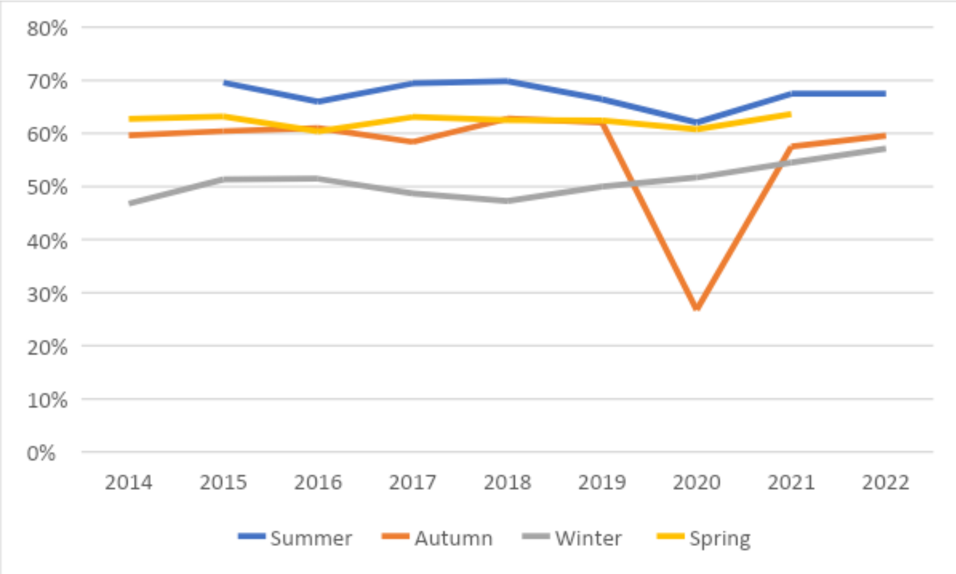
Figure 21. Monthly Averages of Occupancy Levels Among Selected Commercial Accommodation Providers in the Australia's South West Tourism Region, 2014 – October 2022



Note: The figure is based on a sample of commercial accommodation providers in the Australia's South West Tourism Region. Based on the STR (2022) – Trend Report of Australia's South West, Western Australia. Own analysis and illustration.

As discussed above, accommodation occupancy rates in the Australia's South West Tourism 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 22). 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). Notably, the gap between winter and summer seasons have been shrinking over the last few years.

Figure 22. Occupancy per Season Among Commercial Accommodation Providers in the Australia's South West Tourism Region, 2014 – October 2022



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 Australia's South West Tourism Region. Based on the STR (2022) – Trend Report of Australia's South West, Western Australia. Own analysis and illustration.

4.2. 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

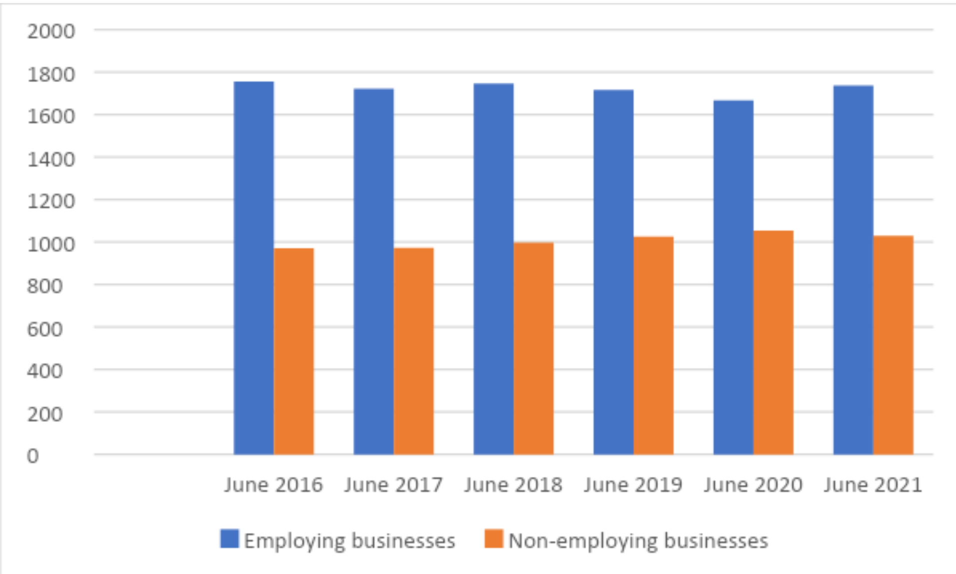
Type of industry	ANZSIC code	ANZSIC industry
Accommodation	44	Accommodation
Ownership of dwellings	6711	Residential property operators
Cafes, restaurants and takeaway food services	451	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	452	Pubs, taverns and bars
	453	Clubs (hospitality)
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 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 (2021b) data, there were 2,766 tourism enterprises in the Australia's South West Region in 2021. More than half of them were employing businesses, a proportion that has consistently oscillated between 61% and 64% during 2016-2021 (Figure 23).

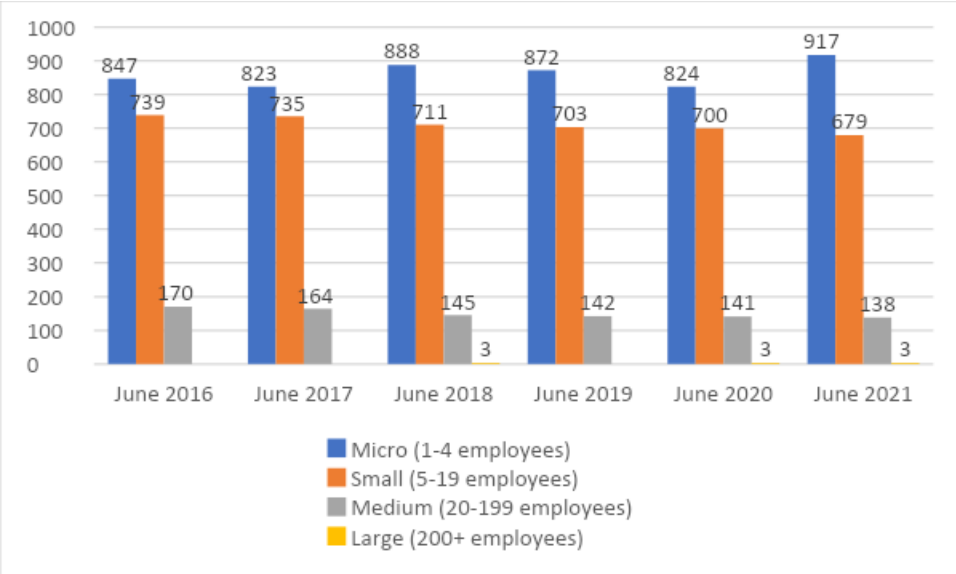
Figure 23. Evolution of Employing and Non-Employing Businesses in the Australia's South West Tourism Region



Note: Smaller estimates need to be used with caution as these may not represent the true number of businesses due to rounding undertaken in the confidentiality process by the ABS. Source: TRA (2021b) based on Australian Bureau of Statistics, ABS Business Register. Own illustration.

Among employing businesses, most were micro businesses for the whole period considered (2016-2021), followed by small companies (Figure 24). In 2021, there were 917 micro companies and 679 small companies, i.e. 92% of all employing companies were micro or small in size and thus had less than 20 employees.

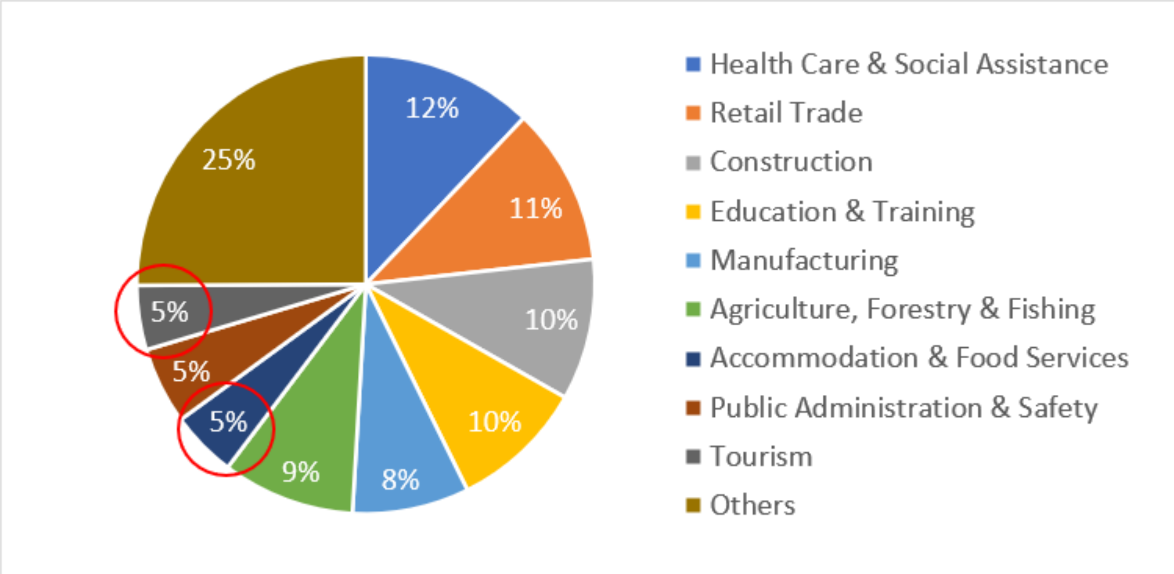
Figure 24. Evolution of Employing Businesses by Size in the Australia's South West Tourism Region



Note: Smaller estimates need to be used with caution as these may not represent the true number of businesses due to rounding undertaken in the confidentiality process by the ABS. Source: TRA (2021b) based on Australian Bureau of Statistics, ABS Business Register Own illustration.

Considering the categories of *tourism* and *accommodation & food services*, tourism generates a total of 8,887 jobs in the form of direct employment, a 9.2% contribution to overall employment in the Australia's South West Tourism Region (REMPLAN, 2022b, 2022d) (see Figure 25). Further, jobs in these categories generate wages accounting for 6% of total wages in the region (REMPLAN, 2022b, 2022d).

Figure 25. Top 10 Industries by Employment Impact in the Australia's South West Tourism Region



Note: The figure shows the distribution of employment of the major industries in the South West and Great Southern regions. Based on ABS 2016 Census Place of Work Employment (Scaled), ABS 2018 / 2019 National Input Output Tables, ABS June 2021 Gross State Product, and ABS 2020 / 2021 Tourism Satellite Account, in collaboration with REMPLAN (2022b, 2022d). Tourism is a cross-sector industry and thus comprises sectors listed in Table 5 entirely or in parts (Australian Bureau of Statistics, 2013). Own illustration.

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 limited specific training (Baum, 2002).

The cities and shires where most tourism jobs were found are Busselton (1,112 jobs), Albany (751 jobs), Bunbury (712 jobs), Augusta-Margaret River (530 jobs) and Manjimup (233 jobs) (REMPLAN, 2022b, 2022d).

4.3. Destination Economic Benefits

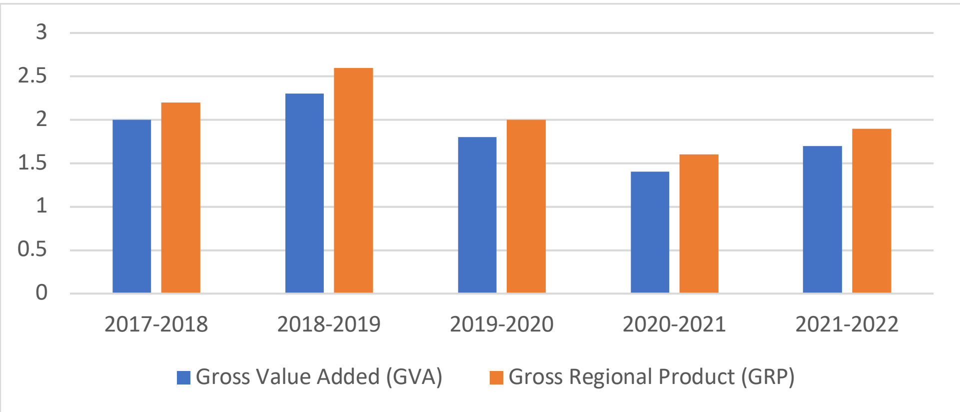
4.3.1. Tourism Economic Contribution

The tourism industry is widely recognised as a key driver of economic prosperity. In 2021-2022 (directly and indirectly), tourism in the Australia's South West (ASW) region was worth $1,689 million measured by Gross Value Added (GVA), equivalent to 7.3% of the region's total economy and 24% of Western Australia's total tourism GVA (Tourism WA, 2023a). If we only consider the direct GVA, it reached $825 million, representing 3.6% of the regional economy.

If we look at the Gross Regional Product (GRP) in 2021-2022, tourism in the Australia's South West (ASW) region was worth $1,886 million, equivalent to 7.9% of the region's total economy and 24% of Western Australia's total tourism GVA (Tourism WA, 2023a). If we only consider the direct GRP, it reached $870 million, representing 3.6% of the regional economy.

Both Gross Value Added (GVA) and Gross Regional Product (GRP) have evolved similarly over the last few years (Figure 26), with a peak in 2018-2019.

Figure 26. Gross Value Added (GVA) and Gross Regional Product (GRP) in the Australia's South West Tourism Region (billions)

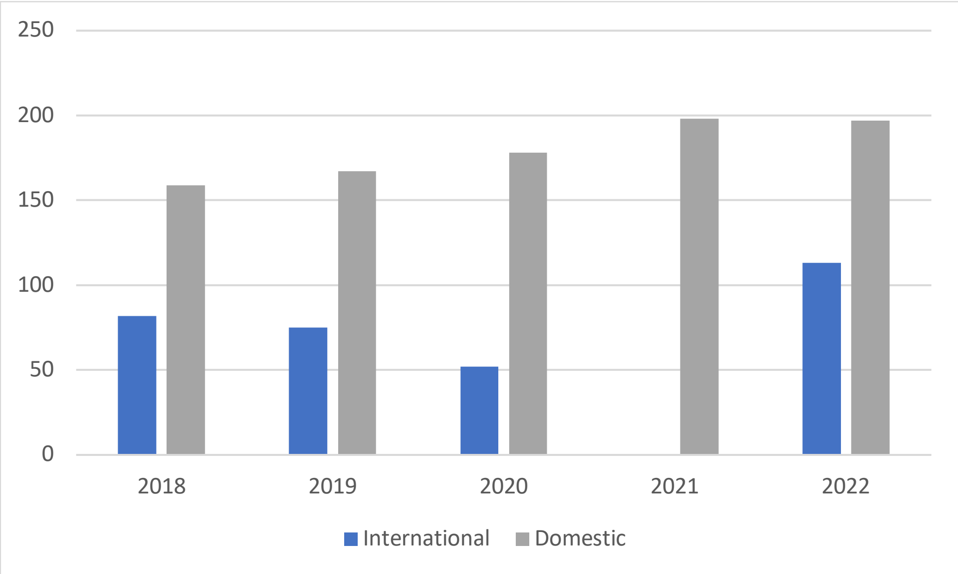


Note: Based on Tourism WA (2023a). Own illustration.

4.3.2. Tourist Spending

Figure 27 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 and Tourism WA (2023b), international overnight visitors to the Australia's South West Region spent an average of $113 per night in 2022, a figure that has increased in comparison to pre-pandemic levels. Meanwhile, domestic overnight visitors spent on average $197 per night, a figure similar to that of 2021 ($198) and increasing in relation to the previous years, even before the pandemic.

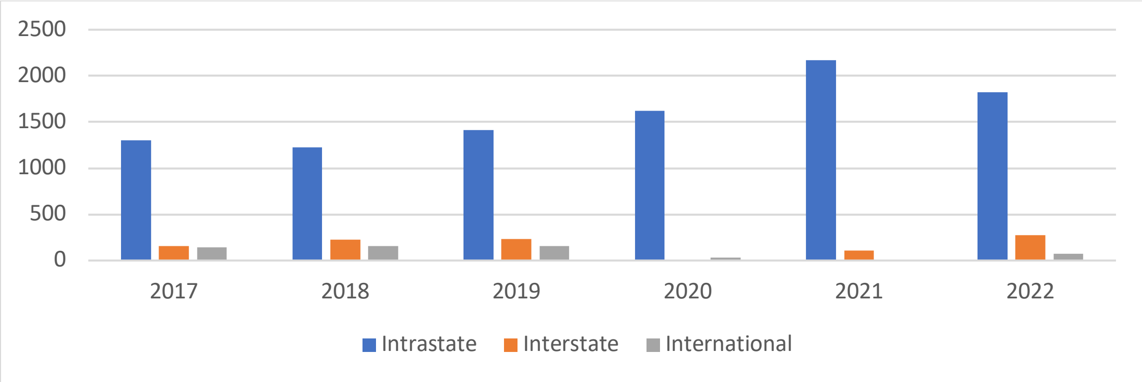
Figure 27. Nightly Spending of Overnight Visitors in the Australia's South West Tourism Region



Note: The figure shows aggregate tourism data of the Australia's South West Region. It is important to note that these estimated rates reflect averages across many types of visitors. Data for International Overnight Visitors in 2021 is not available. Based on TRA-IVS and NVS 2018-2022, in collaboration with Tourism WA (2023b). Own Illustration.

In 2022, the total spend of overnight visitors was $1,824 million for intrastate visitors and $277 million for interstate visitors, while the total spend for international visitors was $75 million (Tourism WA 2023b; Figure 28).

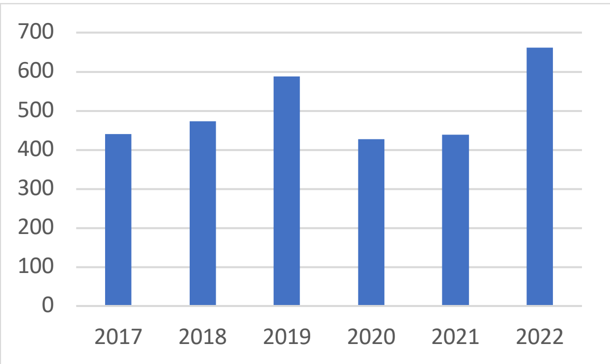
Figure 28. Total Spending of Overnight Visitors in the Australia's South West Tourism Region



Note: The figure shows aggregate tourism data of the Australia's South West Region. It is important to note that these estimated rates reflect averages across many types of visitors. Data for International Overnight Visitors in 2021and Interstate Overnight Visitors in 2020 is not available. Based on TRA-IVS and NVS 2018-2022, in collaboration with Tourism WA (2023b). Own Illustration.

Day-trip travellers' spend has been recovering post COVID-19, with 2022 figures surpassing those from 2019 ($662 million in 2022 versus $427 million in 2019) (see Figure 29).

Figure 29. Total Spending of Day Trip Visitors in the Australia's South West Tourism Region (million)

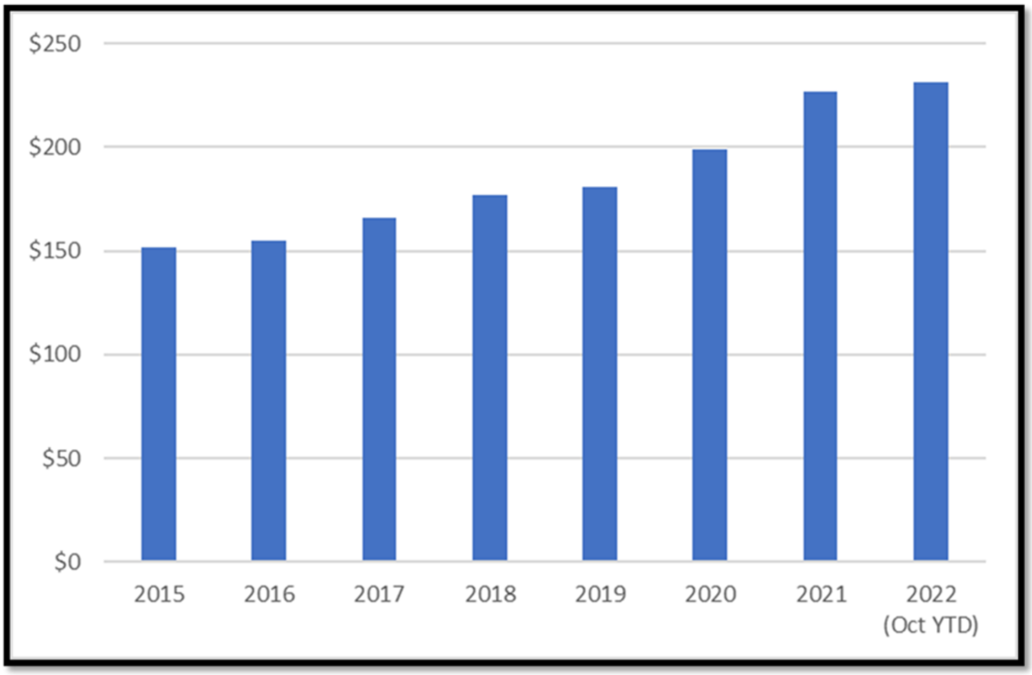


Note: The figure shows aggregate tourism data of the Australia's South West Region. It is important to note that these estimated rates reflect averages across many types of visitors. Based on TRA-IVS and NVS 2018-2022, in collaboration with Tourism WA (2023b). Own Illustration.

4.3.3. Average Daily Rate (ADR)

On average, the daily room rate (ADR) in commercial accommodations in Australia's South West Tourism Region amounted to $227 in 2021, with an average 6.8% p.a. growth between 2015 and 2021 (see Figure 30). The average daily rates for the year 2022 (until October) amounted to $232, an increase of 2.2% compared to the average value in 2021.

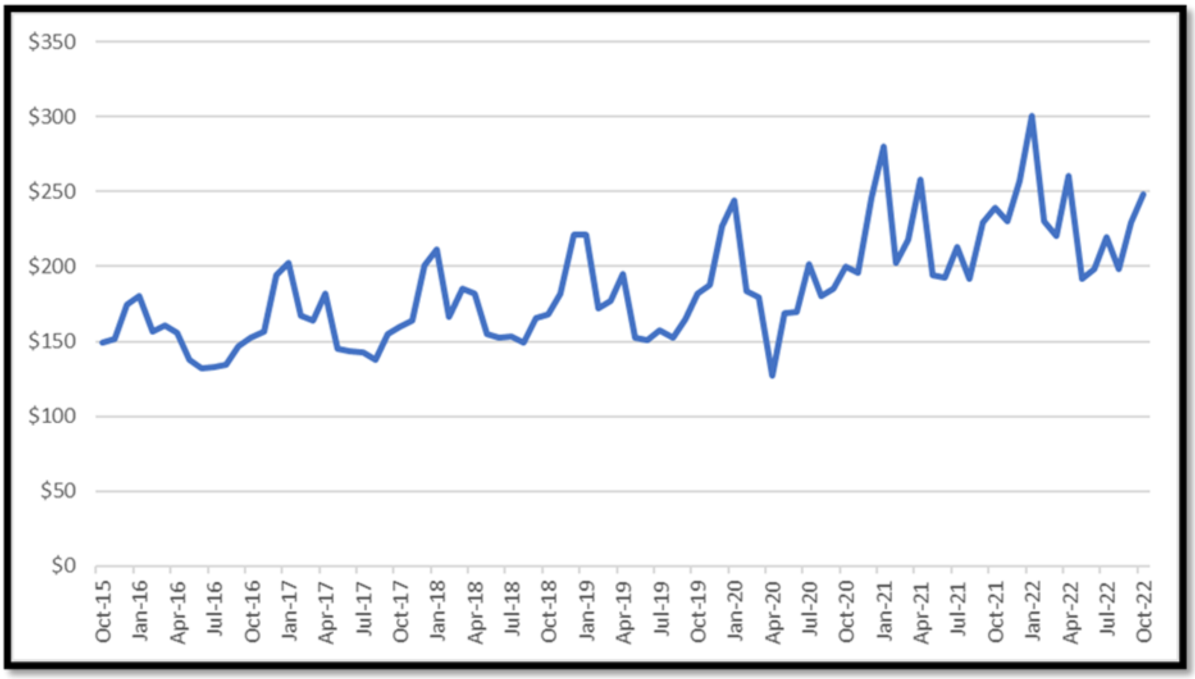
Figure 30. Annual Average of Daily Rates among Selected Commercial Accommodation Providers in Australia's South West Tourism Region, 2016 - October 2022



Note: The figure is based on a sample of commercial accommodation providers in the Australia's South West region. Based on STR (2022) – Trend Report of Australia's South West, Western Australia. Own illustration.

Monthly daily rates mirror the seasonal fluctuations of occupancy rates, with the highest ADR above $220 since 2019 and above $250 since 2021 occurring from December to January, followed by a second peak around the Easter school holidays usually in April with an ADR well above $200 since 2019 and even above $250 since 2021 (see Figure 31). The lowest ADRs per year were recorded between May and August and went as low as $127. The COVID-19 pandemic-induced short lockdown altered the ADR dynamics in 2020, with rates briefly plummeting in April 2020 (i.e., the period with the most severe travel restrictions), while in January 2022 ADR peaked at $300, in line with the significant increases seen in occupancy rates.

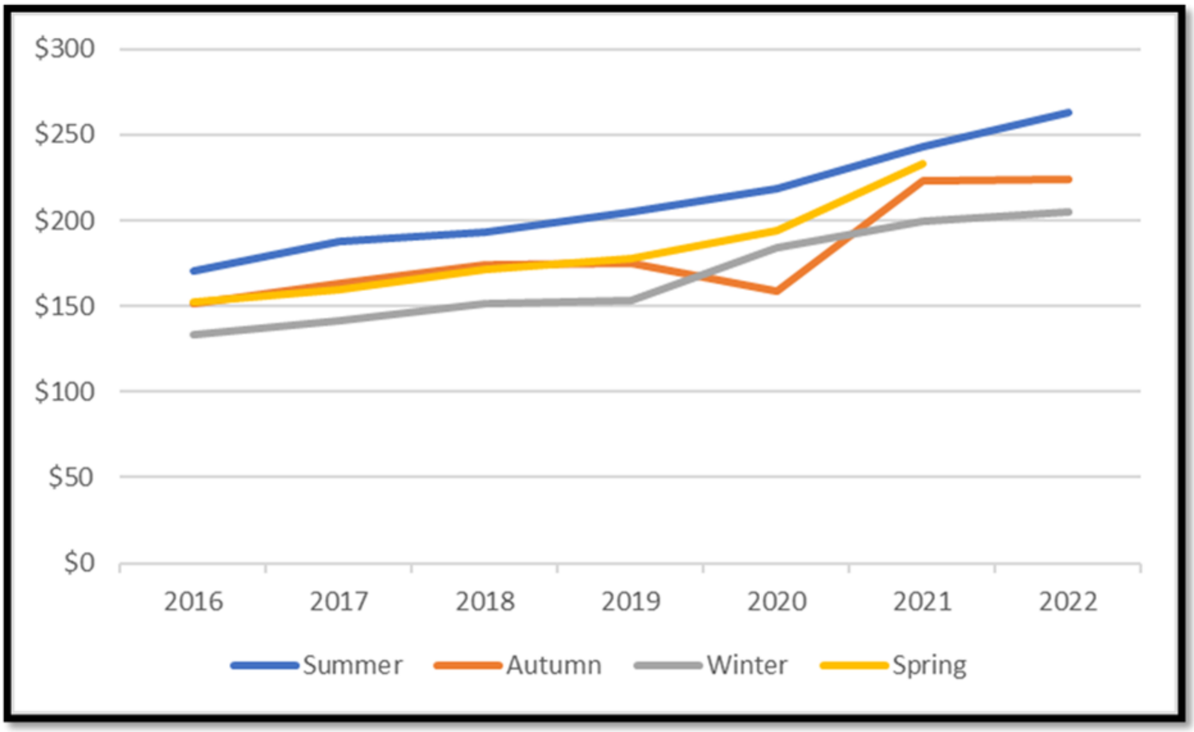
Figure 31. Monthly Average of Daily Room Rates among Selected Commercial Accommodation Providers in Australia's South West Tourism Region, October 2015 – October 2022



Note: The figure is based on a sample of commercial accommodation providers in the Australia's South West region. Based on STR (2022) – Trend Report of Australia's South West, Western Australia. Own 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 32). The highest ADRs of above $200 (since 2019) are regularly applied during the summer months, and are approximately 19 to 33% higher than the rates during the off-peak season in winter. The daily rates in the autumn and spring seasons show comparable patterns and have range between $150 and $230 during the period 2016-2022. These 7 years were characterised by a consistent increase in rates.

Figure 32. Seasonal Average of Daily Room Rates among Selected Commercial Accommodation Providers in the Australia's South West Tourism Region, 2016 – 2022

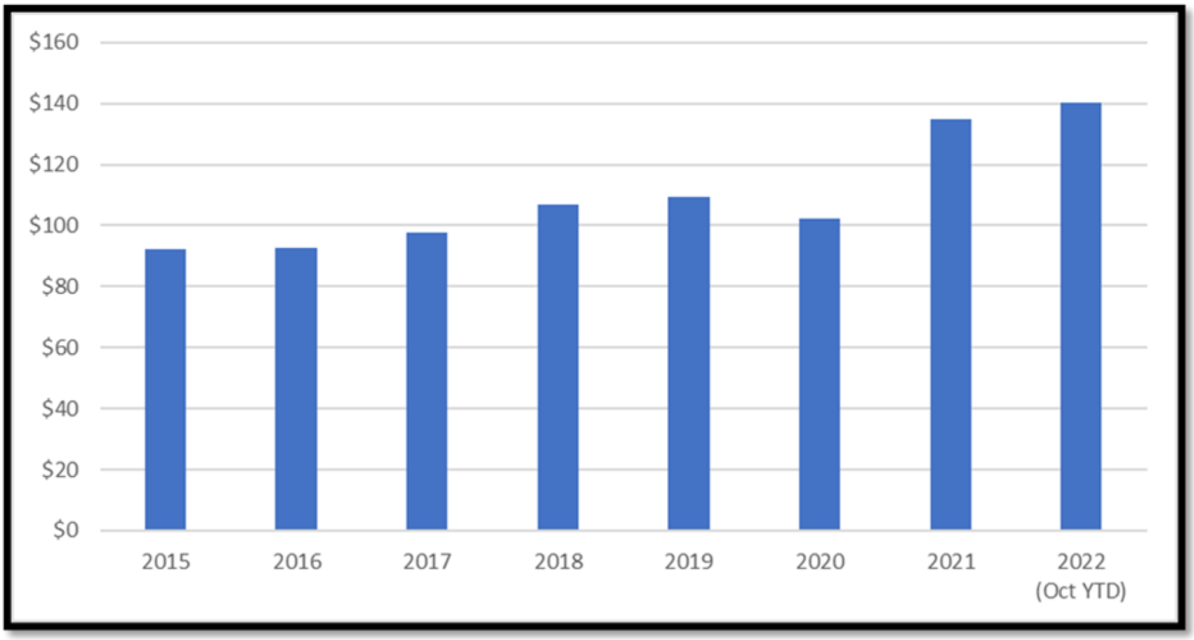


Note: Spring includes the months of September to November, Summer includes the months of December to February, Autumn includes the months of March to May, and Winter includes the months of June to August. The figure is based on a sample of commercial accommodation providers in the Australia's South West region. Based on STR (2022) – Trend Report of Australia's South West, Western Australia. Own illustration.

4.3.4. Revenue per Available Room (RevPAR)

Between 2015 and 2021, the revenue per available room (RevPAR) among selected commercial accommodations in the Australia's South West Tourism Region grew by 6.5% p.a., on average, reaching $135 in 2021 (see Figure 33). The average RevPAR for the year 2022 (until October) reached $140, showing an increase of 4% compared to the average value in 2021.

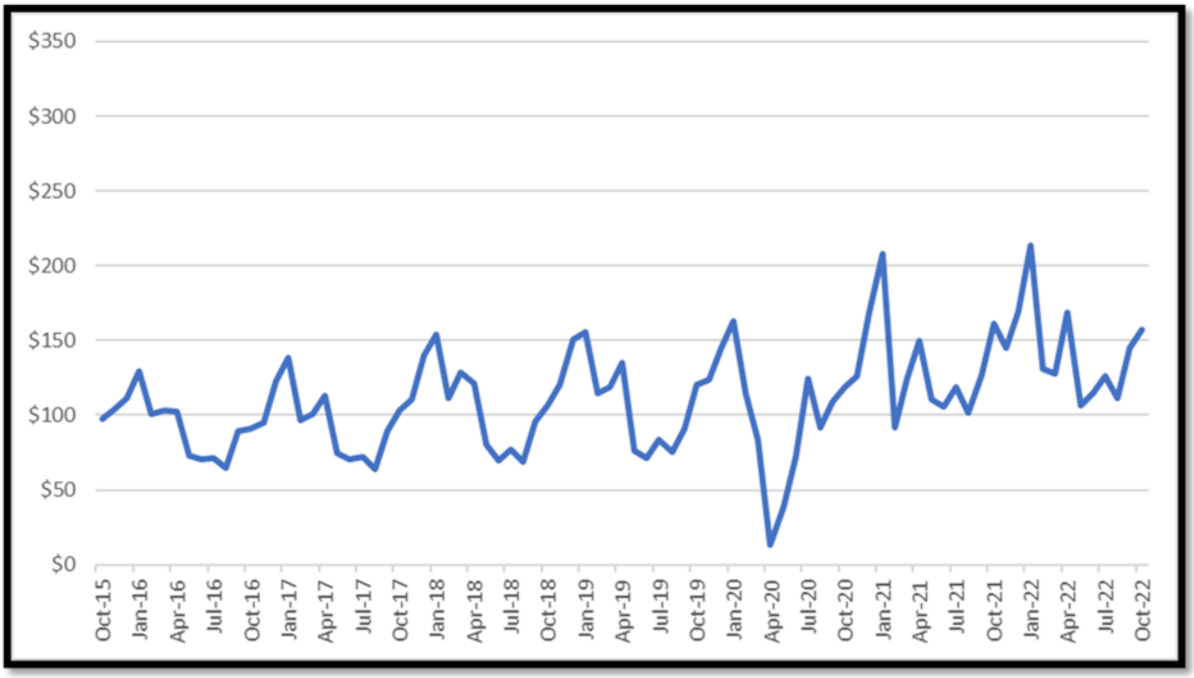
Figure 33. Average of Revenue per Available Room (RevPAR) among Selected Commercial Accommodation Providers in the Australia's South West Tourism Region, 2015 – October 2022



Note: The figure is based on a sample of commercial accommodation providers in the Australia's South West region. Based on STR (2022). Own illustration.

Monthly RevPAR in the Australia's South West Tourism Region mirrors seasonal trends in daily room rates, fluctuating mostly between $100 to $150 in January and February (and even surpassing $200 in the most recent years) and around $70 to $100 in June and August (see Figure 34). The COVID-19 pandemic altered the RevPAR dynamics in 2020, with rates briefly plummeting in April 2020 (i.e., the period with the most severe travel restrictions).

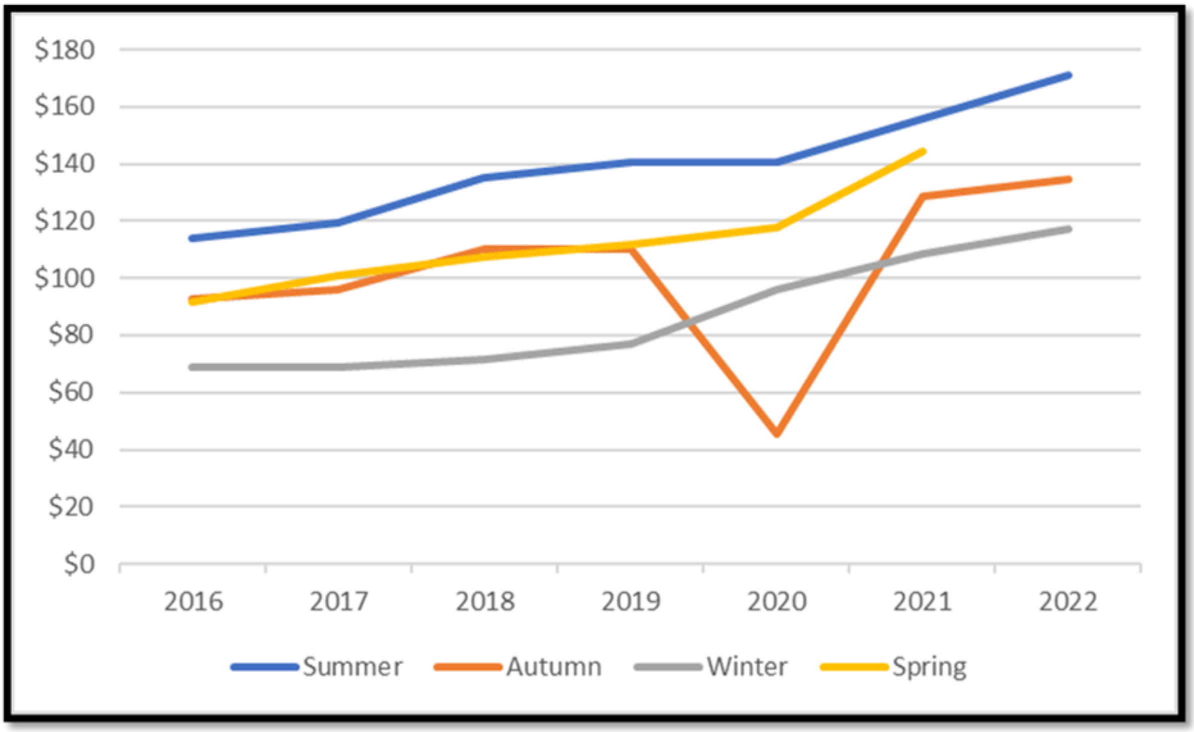
Figure 34. Monthly Average of Revenue per Available Room (RevPAR) among Selected Commercial Accommodation Providers in the Australia's South West Tourism Region, October 2015 – October 2022



Note: The figure is based on a sample of commercial accommodation providers in the Australia's South West region. Based on STR (2022). Own illustration.

The seasonal pattern of RevPAR (2016-2022) shows similar trajectories as occupancy rates and daily room rates. The highest RevPAR of $114 to $171 is achieved during the summer season, while the lowest of $69 to $117 are seen during the off-peak season in winter (see Figure 35). RevPAR in the autumn and spring seasons amount to similar values of approximately $90 to $110 in most past years but approaching and for the spring season even exceeding $140 in most recent years. The RevPAR in Australia's South West has been showing increasing trends across all seasons, except during autumn in 2020 due to the COVID-19 outbreak and associated intra-state travel restrictions.

Figure 35. Seasonal Average of Revenue Per Available Room (RevPAR) among Selected Commercial Accommodation Providers in the Australia's South West Tourism Region, 2016 – 2022



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 Australia's South West region. Based on STR (2022) – Trend Report of Australia's South West, Western Australia. Own illustration.

4.4. Resident Satisfaction

The Resident Survey Project aims to support local stakeholders in data collection and analysis to enable evidence-based decision-making. The resident survey's second and third editions were held from 15/11/2021 to 10/12/2021 and from 03/10/2022 to 01/11/2022. The sample was collected using an online survey and included 211 participants for the 2021 round, and 353 participants for the 2022 round. Only residents from the South West Tourism Region were considered valid participants. Data was collected in collaboration with the City of Albany, the City of Busselton, the Shire of Augusta - Margaret River, the Shire of Denmark and the Shire of Manjimup.

The implementation included the following steps (Figure 36).[1]

Figure 36. Steps in the Implementation of the Resident Survey Project in the Australia's South West Tourism Region

Step 1: Design	Step 2: Partnerships	Step 3: Launch
• Survey revision and minor changes. • Curtin University Ethics approval of project.	• Contact with cities and shires for survey distribution.	• Survey distribution via cities and shires (e.g. Facebook pages and groups, Instagram, LinkedIn)

Note: Own elaboration.

4.4.1. Sample

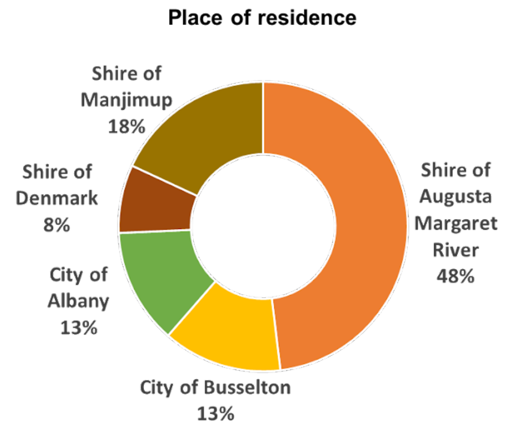
Most respondents in the survey sample in 2021 were from the Shire of Augusta - Margaret River (48%). Still, there were also participants from the Shire of Manjimup (18%), the City of Albany (13%), the City of Busselton (13%) and the Shire of Denmark (8%). Three-quarters of those surveyed in 2021 were female; meanwhile, in 2022, 51% were female and 48% were male (Figure 37).

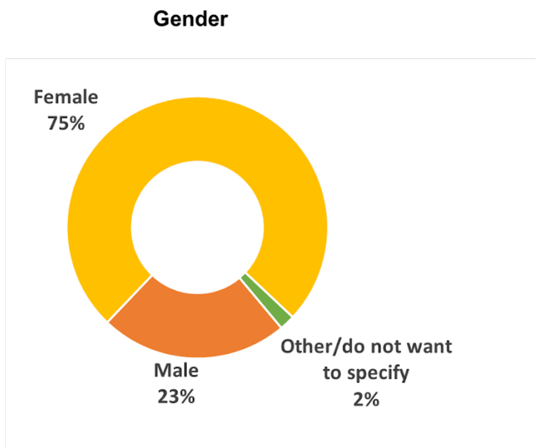
[1] The 2022 survey round was the result of a collaborative project between Curtin's Tourism Research Cluster (TRC) and the Bankwest Curtin Economics Center (BCEC), published in the report 'GO your own WA' from March 2023, available at https://bcec.edu.au/publications/go-your-own-wa-recovery-and-regeneration-for-the-tourism-industry-in-western-australia/

Figure 37. Distribution of Respondents by Place of Residence and Gender (2021, 2022)

2021 round

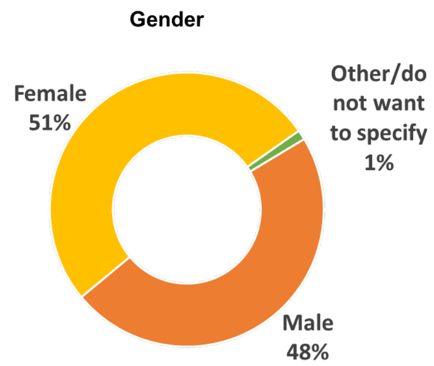
n=211





2022 round

n=353

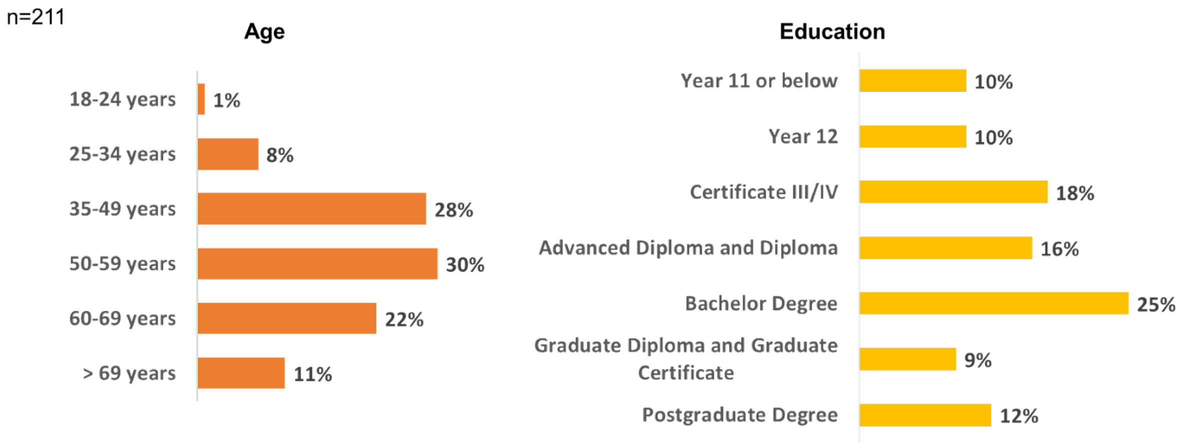


Note: Own elaboration. Because of the slightly changed survey design, place of residence data is not available for 2022.

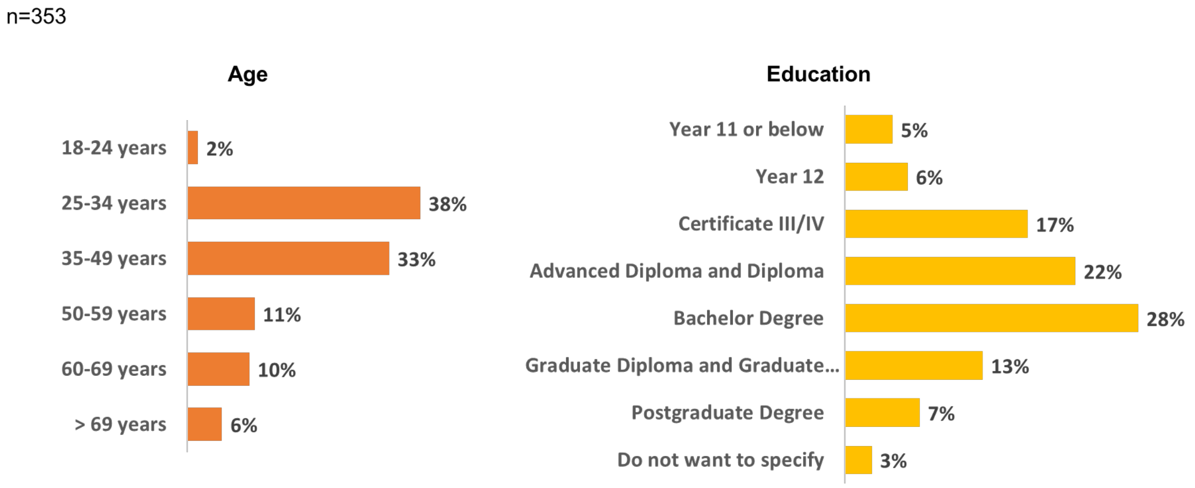
Respondents were from different age ranges, especially 35 to 59 years old in 2021 (58%) and 25 to 49 in 2022 (71%). Further, respondents presented a variety of education levels. Bachelor Degree was the most commonly indicated education level in both years (25% in 2021 and 28% in 2022), followed by Certificate III/IV in 2021 (18%) and Advanced Diploma and Diploma in 2022 (22%) (Figure 38).

Figure 38. Distribution of Respondents by Age and Education (2021, 2022)

2021 round



2022 round



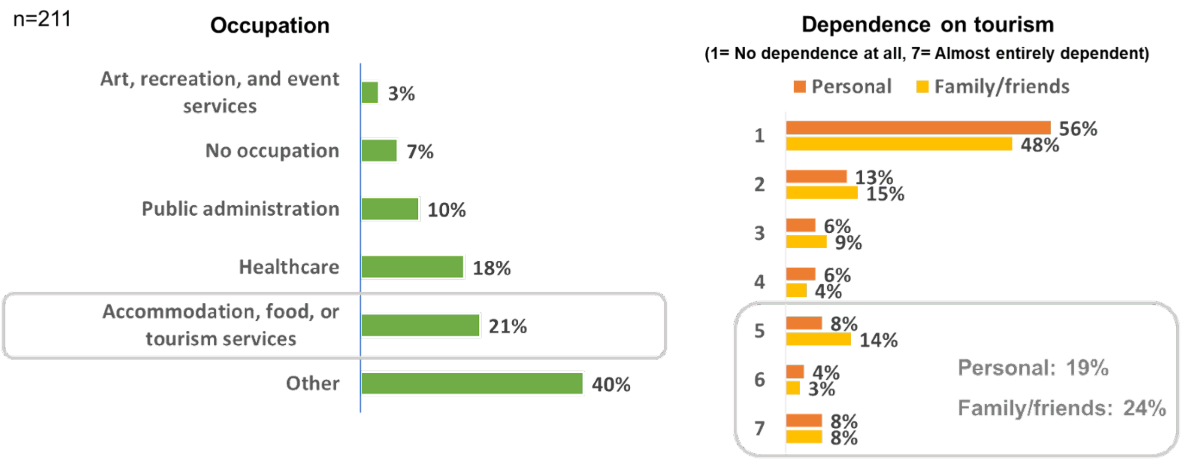
Note: Own elaboration.

In terms of occupation, around 20% indicated that they were working in tourism services (21% in 2021 and 19% in 2022).

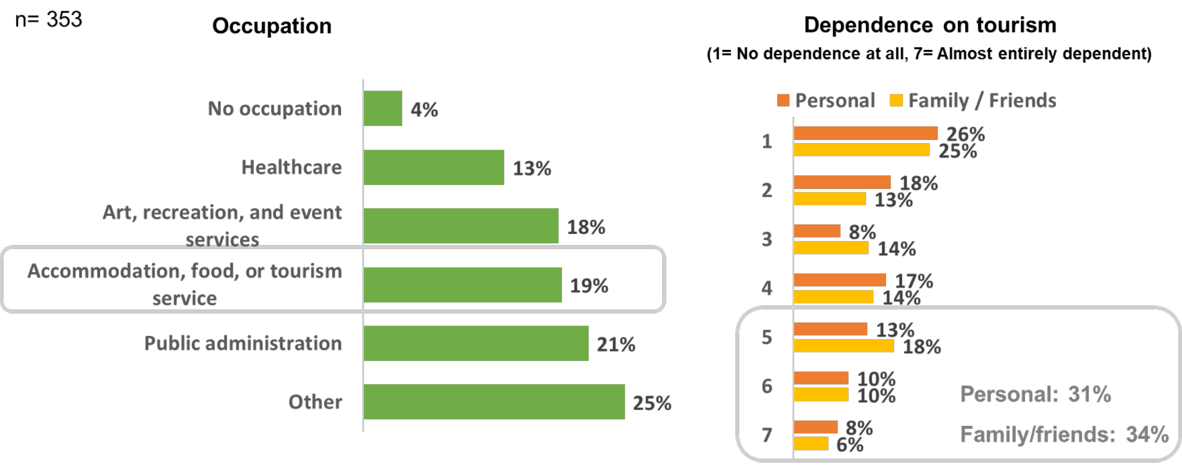
When asked to what extent their personal livelihoods depended on tourism, 19% in 2021 and 31% in 2022 agreed that their personal lives depended on this sector. Meanwhile, 24% in 2021 and 34% in 2022 declared that their family or friends' lives relied on tourism (Figure 39).

Figure 39. Distribution of Respondents by Occupation and Dependence on Tourism (2021, 2022)

2021 round



2022 round

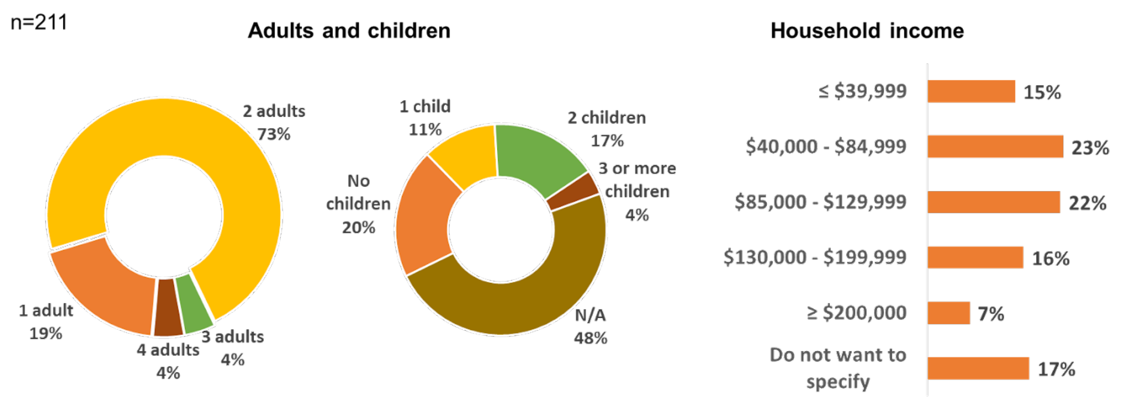


Note: Own elaboration.

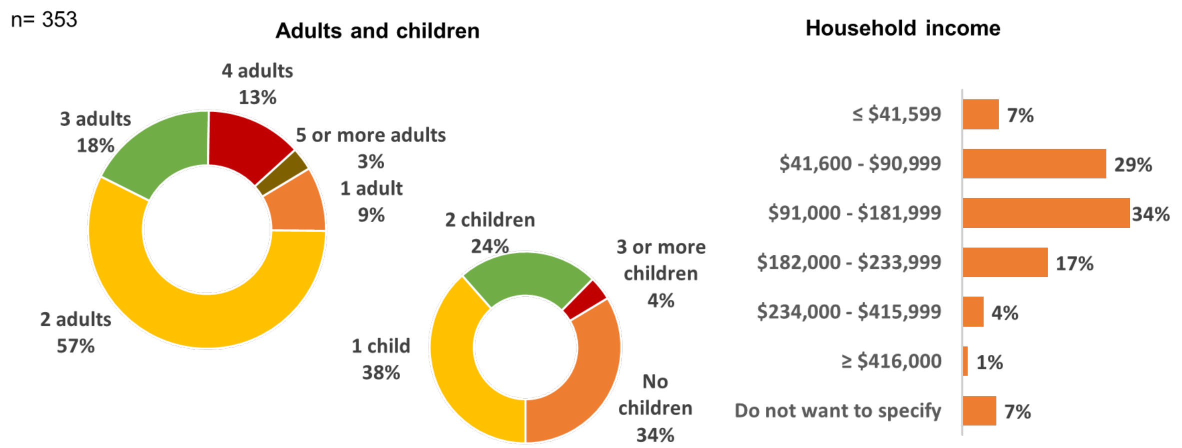
Concerning the characteristics of the households, most respondents lived in homes with two adults (73% in 2021 and 57% in 2022). Among those who declared the number of children in the household, most had no children in 2021 (205) while most had one child in 2022 (38%). Household incomes were varied, but almost half of the residents interviewed (45%) had an income oscillating between $40,000 and $130,000 in 2021. Meanwhile, 63% had an income between $41,600 and $181,999 in 2022 (Figure 40).

Figure 40. Distribution of Respondents by Household Type and Income (2021, 2022)

2021 round



2022 round

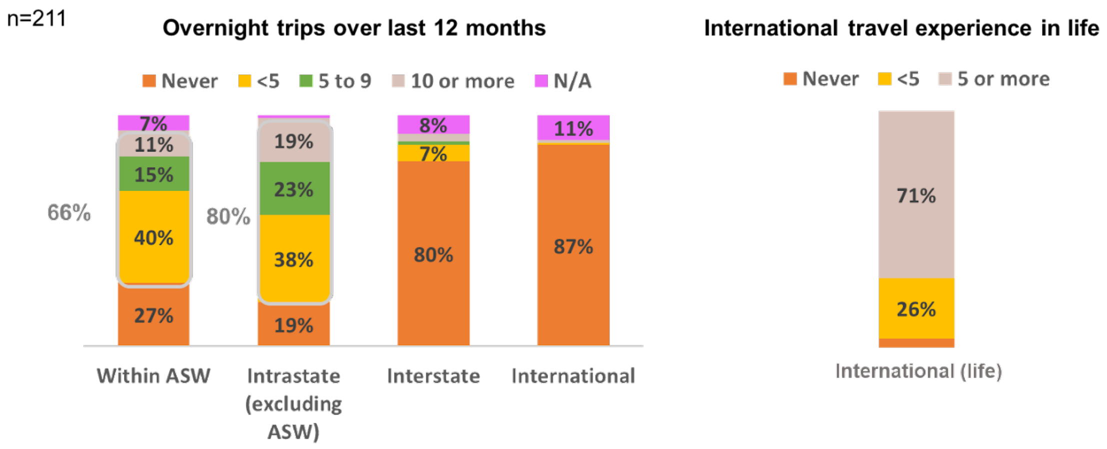


Note: Own elaboration.

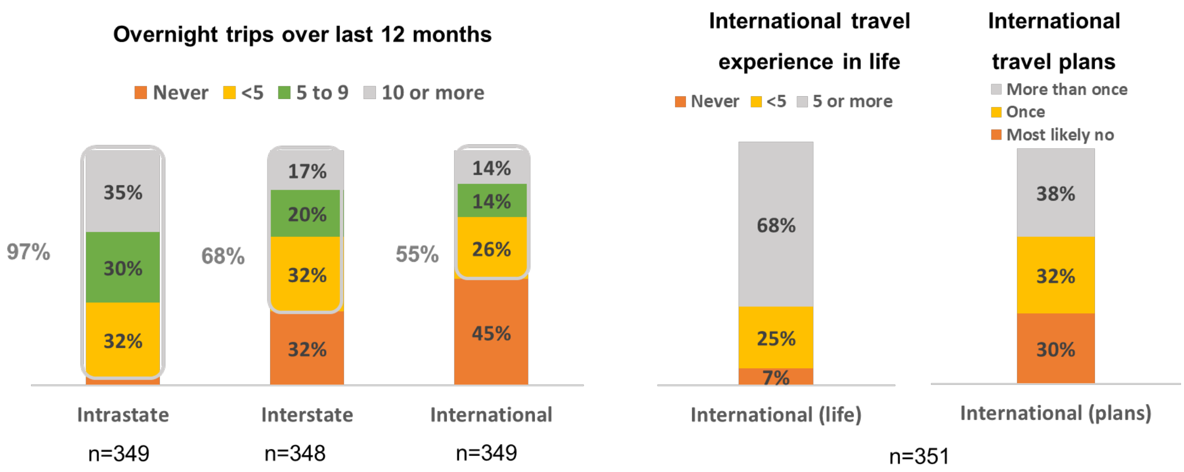
Residents were also asked to indicate their travel experience (Figure 41). In 2021, two thirds had travelled in the previous year within the Australia's South West Tourism Region (ASW) and 80% within WA excluding the ASW. That year, only 20% declared to travelled interstate (out of Western Australia but within Australia) and 87% did not travel abroad, even though 71% had made five or more international trips during their lives. On the other hand, in 2021 97% reported to have travelled intrastate, 68% interstate and 55% internationally in the previous year. Further, 70% had international travel plans.

Figure 41. Distribution of Respondents by Travel Experience (2021, 2022)

2021 round



2022 round



Note: Own elaboration.

4.4.2. Resident perceptions of tourism numbers, tourist behaviour, tourism impacts and management measures

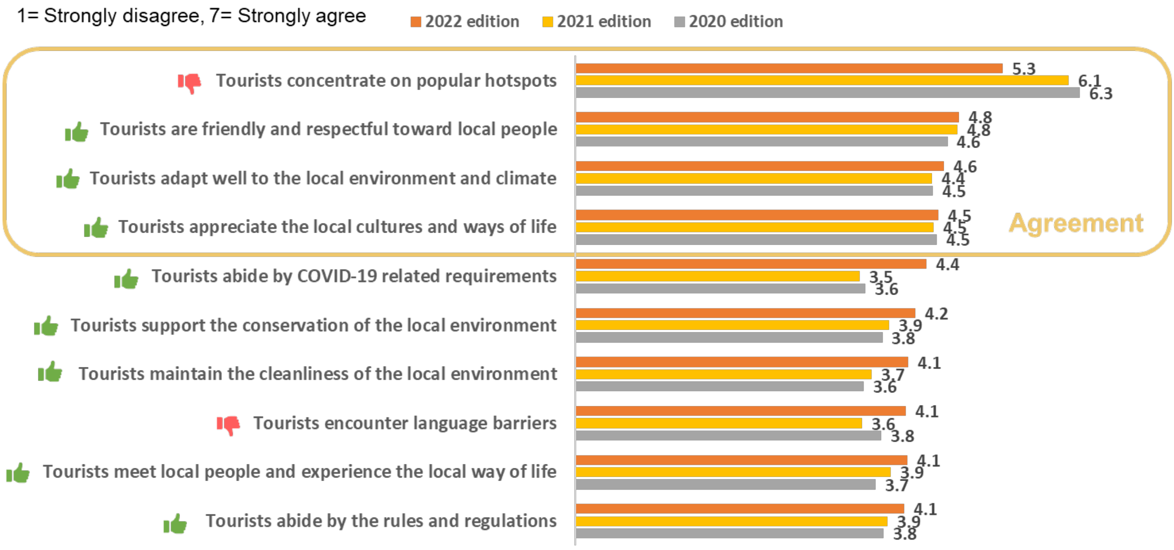
Figure 42 indicates how residents perceive the overall number of tourists in the ASW Tourism Region. In 2021, a slight majority of 56% felt that there was an imbalance towards too many tourists, a proportion that increased by 14 percentage points compared to the previous survey in 2020 and to pre-pandemic times. However, in 2022 this proportion decreased by almost 20 percentage points to 38%.

Figure 42. Residents' Perception of the Number of Tourists Visiting the Region (2020, 2021, 2022)

Note: Own elaboration.

The survey also investigated residents' perceptions of tourists' behaviour in the region. Similar to the 2020 edition of the survey, both in 2021 and 2022 respondents tended to agree with all statements about tourist behaviour, but mostly about the statement that tourists concentrate on popular hotspots. Additionally, there was agreement with the statements that tourists are generally friendly, respectful, adaptive to the local environment and appreciative of local cultures (Figure 43).

Figure 43. Residents' Perception of Tourists' Behaviours in the Region (2020, 2021, 2022)

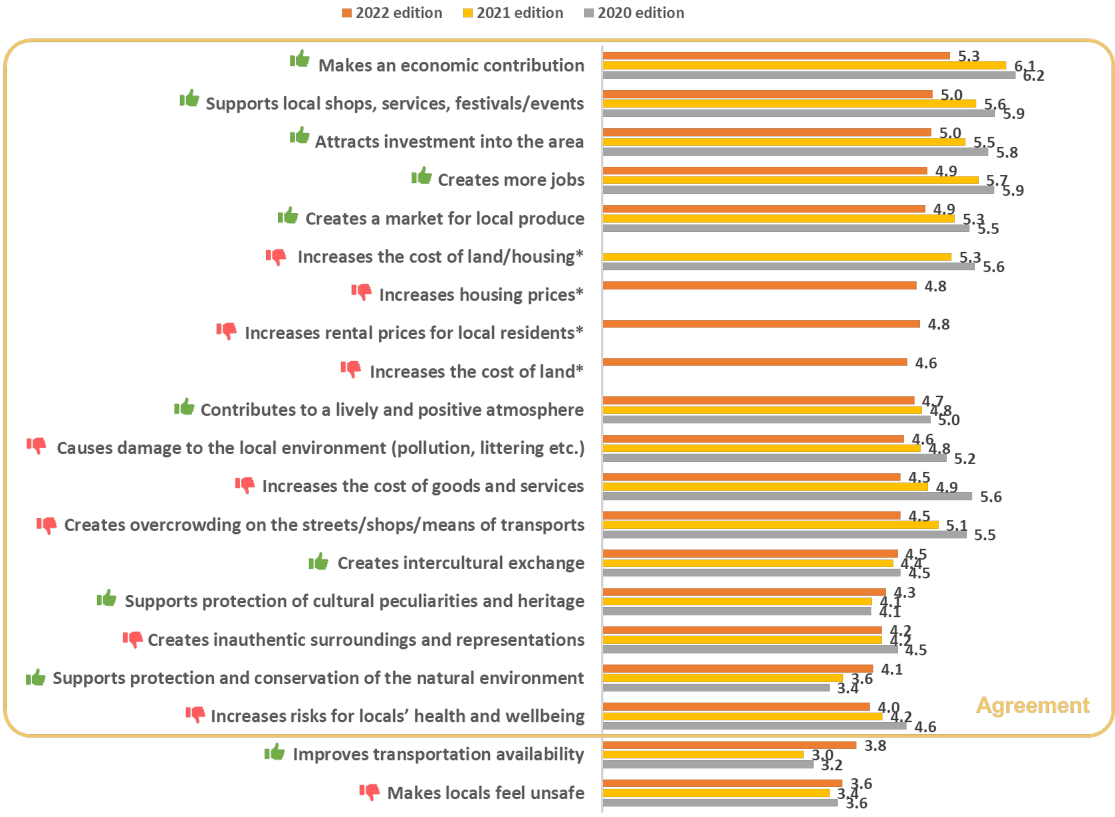


Note: Own elaboration.

In terms of tourism impacts, those interviewed strongly agreed with the sector's positive economic impacts in terms of overall economic contribution, job creation, support of local activities (shops, services, festivals and events) and investment attraction. In particular, tourism's overall economic contribution to the region was the most highly recognised impact, with an average of 6.1 in 2021 and 5.3 in 2022 on a 1 to 7 scale (Figure 44).

Despite being cognisant of the benefits of tourism, residents also showed some concern regarding the negative impacts of tourism. This was especially the case for impacts like the increasing costs of land, housing, rent, goods and services as well as some perceived negative impacts to the environment and overcrowding (on the street, shops and transport).

Figure 44. Residents' Perception of Tourism Impacts in the Region (2020, 2021, 2022)

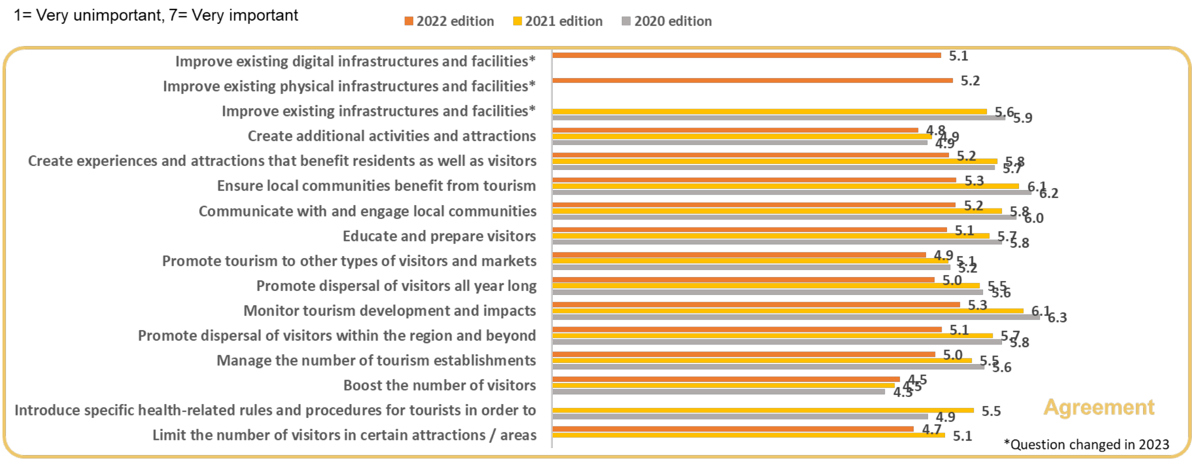


*Question changed in 2023.

Note: Own elaboration.

The survey also collected residents' opinions regarding (potential) measures to manage the impacts of tourism (Figure 45). Residents generally showed support for all the measures proposed in the survey in a consistent way throughout the years. The most strongly supported measures in the three survey editions were monitoring tourism development and its impacts, and ensuring that local communities benefit from tourism. On the other hand, among the listed measures boosting the numbers of visitors further received slightly less strong support (while support was still above the mid-point of the scale). However, notably, support for this particular measure increased over the years 2020 to 2022 which is remarkable as there is a tendency in the data for average support levels to fall.

Figure 45. Residents' Perception of Tourism Impacts Management in the Region (2020, 2021, 2022)



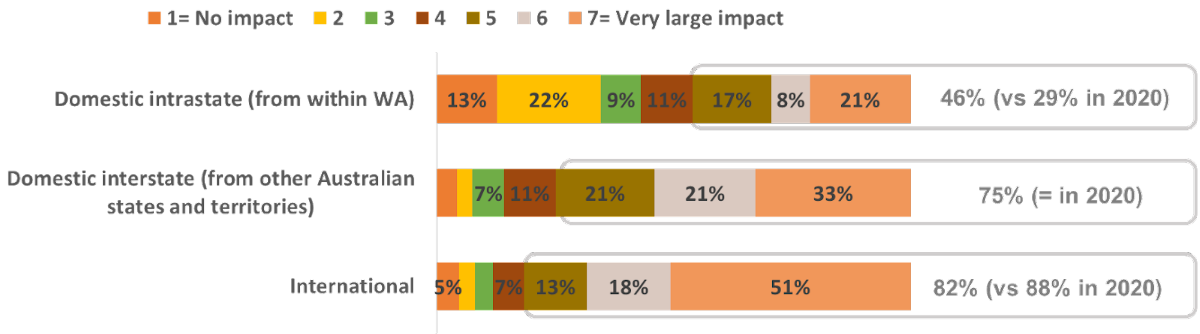
Note: Own elaboration.

4.4.3. Resident perceptions of COVID-19 and overall tourism

The 2021 survey edition included some questions concerning COVID-19. Residents were asked about their perceptions regarding the risk of transmission from different tourist categories (Figure 46). Almost half of the residents (46%) considered that tourists from WA (i.e., domestic intrastate tourists) (somewhat) increased COVID-19 transmission risks. This represented an increase of 17 percentage points from the 2020 edition of the survey.

Residents were more concerned about the COVID-19 risk of transmission from tourists that were not from WA. Three-quarters of those interviewed in 2021 agreed that domestic interstate tourists (i.e., tourists from Australian states and territories other than WA) had some impact on COVID-19 transmission risk, a figure similar to that of the previous survey. Furthermore, 82% of the residents believed international tourists increased this risk, a proportion that dropped slightly from the 2020 survey (88%).

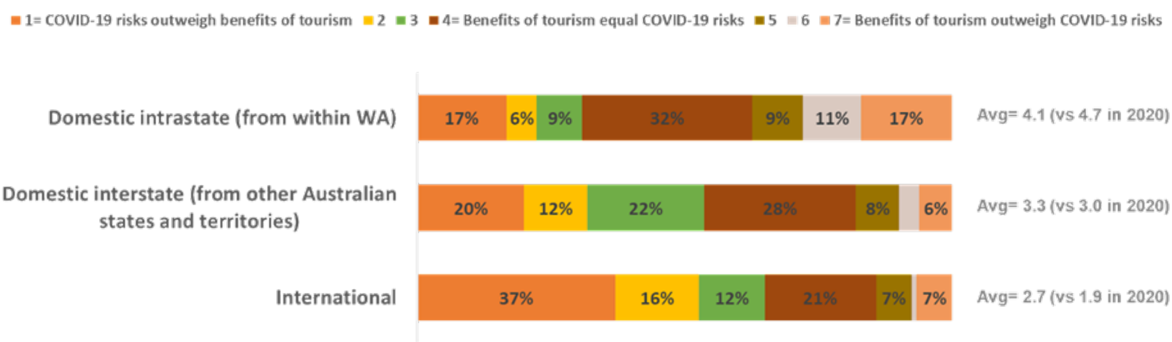
Figure 46. Residents' Perception of the Risk for Transmission of COVID-19 in the Region from Different Tourist Categories (2021)



Note: Own elaboration.

Residents were also enquired about their perceptions of the benefits versus risks of travel into the region (Figure 47). This relation was assessed on a scale of 1 to 7 (with 1 meaning that risks outweighed benefits and 7 the exact opposite). In line with the results above, residents considered that, on average, benefits slightly outweighed risks for domestic intrastate tourists (although more residents, on average, had acknowledged this in 2020). Contrarily, residents considered that the risks outweighed the benefits for interstate and (especially) international tourists. However, in the case of international tourists, the average risk-benefit relation has improved from the 2020 edition (indicating a perception of increasing benefits and/or decreasing risks, on average).

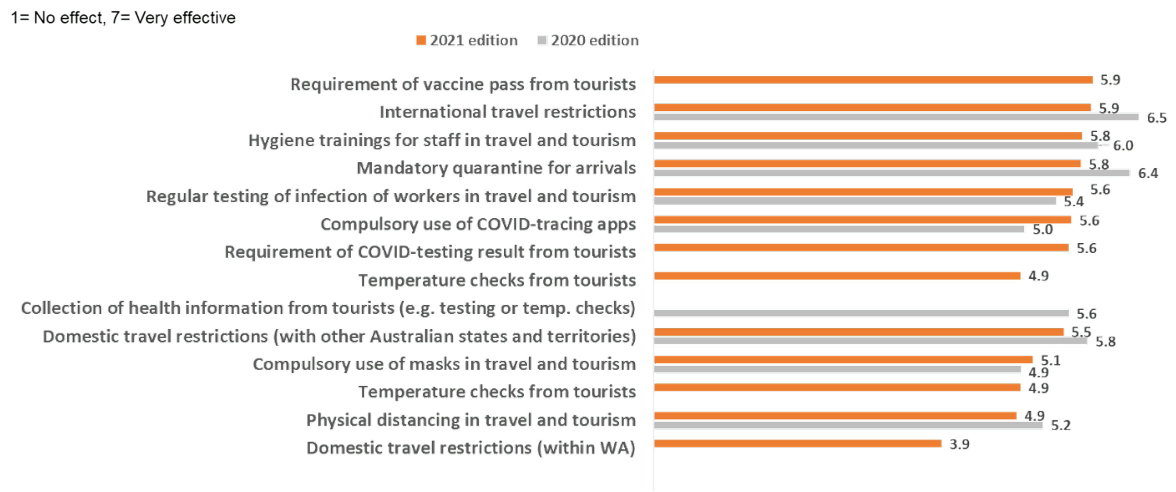
Figure 47. Residents' Perception of the Benefits versus Risks of Travel in the Region for Particular Tourist Categories (2021)



Note: Own elaboration.

All containment measures to control the spread of COVID-19 included in the survey were considered effective (Figure 48). However, some measures stood out, in particular, the requirement of a vaccine pass from tourists, international travel restrictions, hygiene trainings for staff in travel and tourism, regular testing of workers in travel and tourism, compulsory use of COVID-19 tracing apps and requirement of COVID-testing results from tourists. Although international travel restrictions and mandatory quarantine were still considered among the most effective measures, their average values dropped versus 2020.

Figure 48. Residents' Perception of the Effectiveness of Containment Measures in Helping to Control the Risks of COVID-19 Spreading in the Region

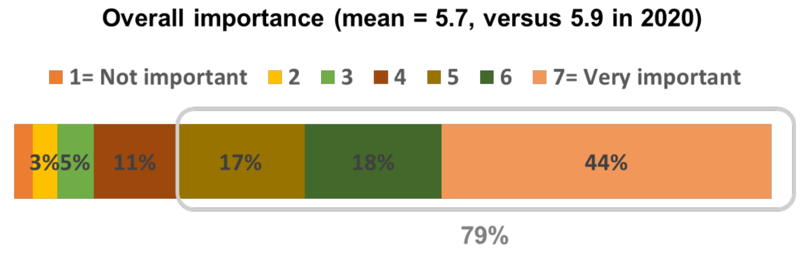


Note: Own elaboration.

Lastly, residents were asked about the importance of tourism for the post-COVID-19 economic recovery perspectives in the region (Figure 49). Almost 2 in 8 residents agreed that tourism was important (35%) or very important (44%) for this recovery.

Additional analysis suggests that the average importance of tourism for economic recovery (from 1 to 7) was greater for certain socioeconomic profiles of residents. Those residing in Manjimup (5.97), Busselton (5.86) and Albany (5.85) considered tourism more important for recovery, on average, than those in Margaret River (5.46) and Denmark (5.37). This also was observed for women (5.84) versus men (5.16); residents working in accommodation, food or tourism services (6.24) versus other economic sectors; and those with Advanced Diploma and Diploma (6.18) or Certificate III/IV (5.73) versus other education levels.

Figure 49. Residents' Perception of the Importance of Tourism for Economic Recovery after COVID-19 in the Region (2021)



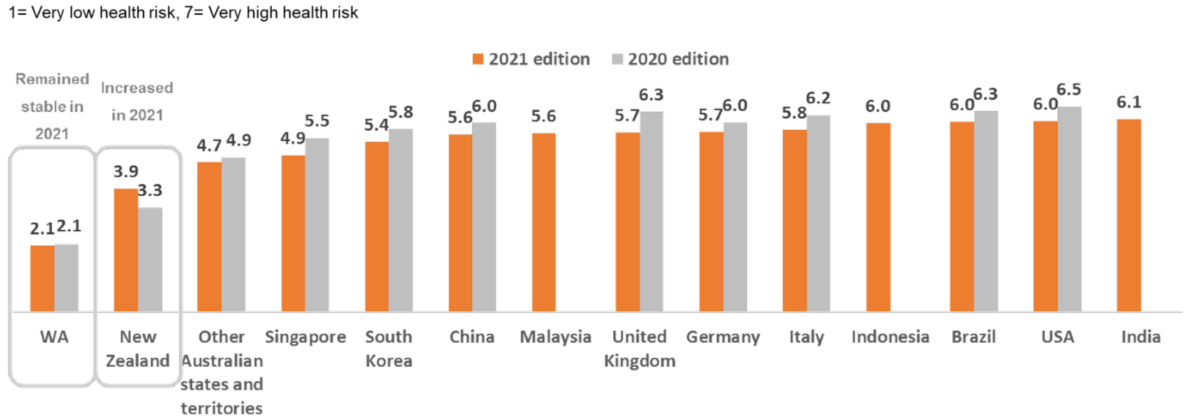
Note: Own elaboration.

4.4.4. Resident perceptions of COVID-19 and opening borders (2021)

A further survey section of the 2021 survey focused on the then timely resident perceptions of COVID-19 risks around opening borders.

Residents were asked about their health-related feelings towards tourists travelling to the ASW region from certain regions/countries (assuming no quarantine on arrival was required) (Figure 50). Residents identified tourists coming from WA and New Zealand as the least risky, with a slight increase in risk perceptions towards those from New Zealand compared to 2020. Notably, perceived risks for New Zealand were lower than for other Australian states and territories, excluding WA. On the contrary, India, the United States of America, Brazil and Indonesia were regarded as the riskiest inbound countries. However, risk perceptions had decreased for most countries compared to the 2020 survey.

Figure 50. Residents' Perceptions of Health Risks of Hosting Tourists who had been in the Following Regions within the Previous Two Weeks (2021)



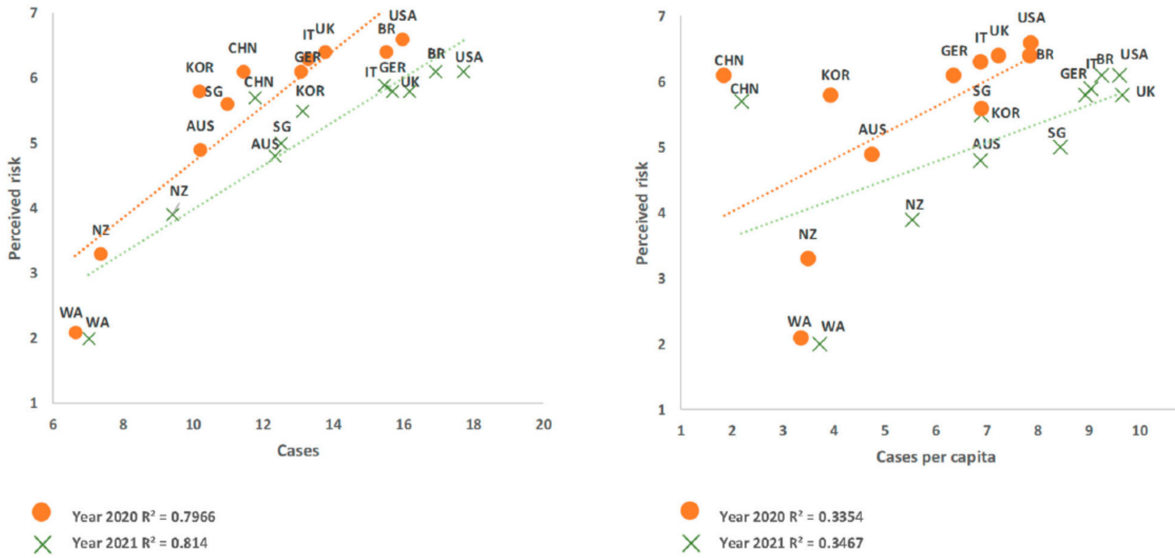
Note: Own elaboration.

As a complementary analysis, we compared residents' perceived COVID-19 risks to objective COVID-19 risks. To do so, we considered alternative objective measures of COVID-19 in the tourists' source regions: cumulative cases (since the first case in 2020 and until 10/12/2021), cumulative cases per 100,000 inhabitants (a per capita adjusted measure of cumulative cases) and new cases (sum of new daily cases in the period starting 1.5 months before the survey closed and the effective closure date, i.e., 25/10/21-10/12/21).

Considering cumulative COVID-19 cases in the source regions, we found that, on average, these were highly correlated to risk perceptions (Figure 51). The R-squared of this relation equals 0.814 in 2021, a number slightly higher than in 2020. This high correlation means that residents were considerably good at assessing COVID-19 relative (between regions/countries) risks. The main biases in perceptions were towards WA, where residents underestimated objective risks. The opposite was observed in perceptions towards people travelling from China, where residents overestimated objective risks. These findings are similar if, alternatively, new COVID-19 cases are considered instead.

However, when considering cumulative cases per 100,000 inhabitants as the objective measure, a considerable drop in the correlation between perceived and objective risk can be found. This means that, on average, residents were not particularly good at assessing relative COVID-19 risks when confronted with a risk measure adjusted by the population in each country. In this case, the main perception biases were towards visitors from China (upward bias), WA (downward bias) and New Zealand (downward bias).

Figure 51. Correlations between Average Perceived and Objective COVID-19 Risk Measures for Tourists from Different Source Countries in 2020 and 2021

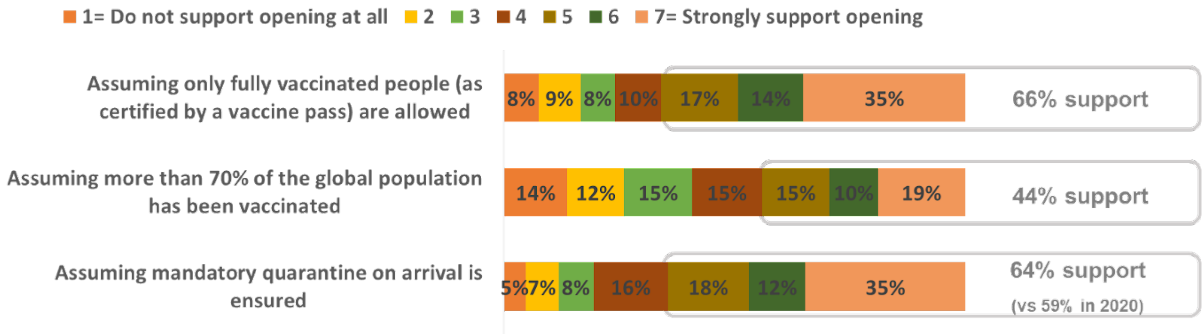


Note: N= 92 for 2020, N=198 for 2021 (residents who assigned the same risk to all tourists from every location were removed from the analysis). Real risk measures are expressed in natural logarithms with lines representing the least square trend lines for 2020 and 2021. Retrieved from Volgger et al. (2022).

The 2021 survey also enquired residents about their support for opening borders to tourism under different scenarios of containment measures: (i) assuming only fully vaccinated people (as certified by a vaccine pass) were allowed, (ii) assuming more than 70% of the global population had been vaccinated, (iii) assuming mandatory quarantine on arrival is ensured (Figure 52).

Nearly half of residents supported opening borders assuming more than 70% of the world population was vaccinated. Furthermore, about two-thirds supported opening borders with either a vaccine pass or mandatory quarantine upon arrival. Additionally, we found that average support was higher for certain socioeconomic profiles of residents, in particular, those working in healthcare and those from Busselton (any measure), Albany (for the measures of full vaccination or quarantine upon arrival) and Manjimup (for the measure of full vaccination).

Figure 52. Residents' Support of Opening International Borders to Tourism Considering Different Containment Measures (2021)



Note: Own elaboration.

4.5. Energy Management

Achieving environmental sustainability in tourism is a relevant component of climate change mitigation. It includes energy management, which is strongly supported by various organisations including the Australia's South West (ASW), the Shire of Augusta-Margaret River and the City of Busselton. Based on information from the Shire of Augusta-Margaret River Climate Action Plan (2020), 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, 2020).

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 100kWat 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, the two 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, 2020, 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, 2020)	Minimum reduction of 20% of the carbon emissions in the AMR by implementing sustainable energy sources.
Improve energy efficiency (Shire of Augusta-Margaret River, 2020)	● 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

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 (planned roll outs to others).

Based on the Climate Action Plan of the Shire of Augusta-Margaret River (2020, p.17), the region was able to reduce energy use thanks to a number of measures, including:

- Installing solar photovoltaic systems on rooftops of Shire buildings, including the Margaret River Recreation Centre and Library
- Replacing indoor and outdoor lighting with energy-efficient LED's
- Preparing and conducting energy audits of Shire buildings and operations
- Installing pool blankets at public swimming pools to reduce heat loss
- Replacing diesel generators with heat pumps at caravan parks.

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, 2020).

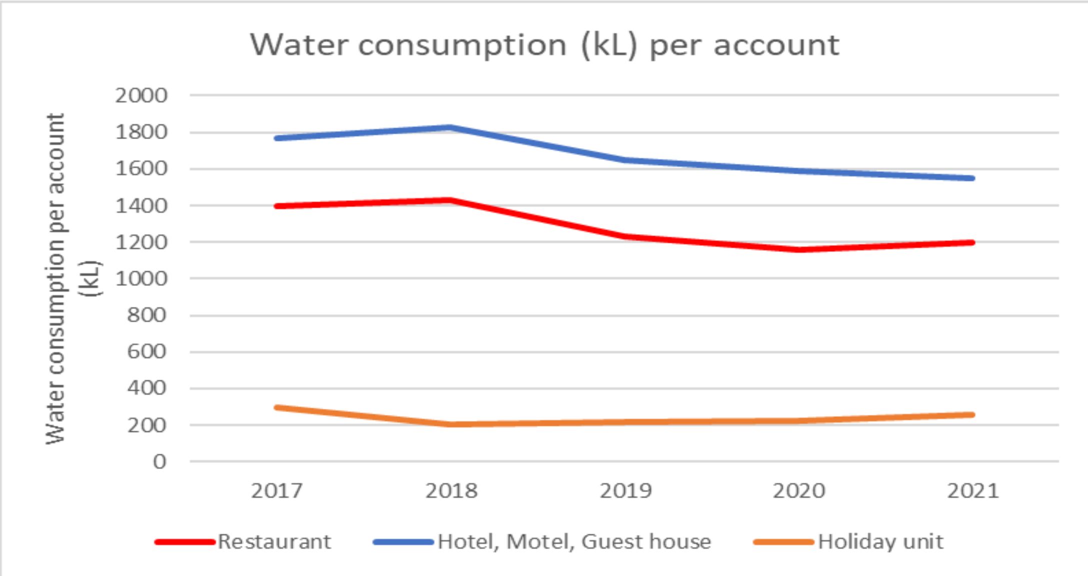
4.6. Water and Wastewater Management

As the climate continues to warm in response to increased carbon emissions, higher temperatures enhance evaporation, and influence rain patterns. WA's climate has altered significantly since the 1970s, with the southwest region representing one of the areas most impacted by global warming due to declining rainfall (Water Corporation 2020). Accordingly, in 2007, the Water Corporation launched a range of 'Waterwise Programs' to encourage collaborative efforts in promoting sustainable water consumption (Water Corporation n.d.). Among these initiatives, the 'Waterwise Business Program' has supported almost 280 organisations to save more than 135 billion litres of water since its inception (Water Corporation, 2023). Authorised by *Water Services Regulation 2013*, the program requires businesses that use more than 20,000 kL of water per year to develop a Water Efficiency Management Plan (WEMP), which involves a detailed description of water-saving initiatives and an annual progress report about these efforts (Water Corporation n.d.). Key initiatives of a Waterwise business include:

- State-of-the-art water efficient technology
- Regular monitoring of water use
- Infrastructure upgrades
- Improved leak detection
- Redesigned irrigation systems and use of waterwise plants
- Recycled water use
- Staff and community collaboration

While the Water Corporation (n.d.) has recognised hospitality businesses (such as resorts) for their water-saving efforts, not all tourism businesses are required to participate in the program, as some business sites use less than 20,000 kL/year. Despite this consideration, Figure 54 shows that water consumption for tourism and hospitality-related businesses in the Margaret River region (Augusta, Cowaramup, Margaret River-Gnarabup-Prevelly and Yallingup-Dunsborough) has decreased over the last five years. Specifically, restaurants have seen a 14.5% decrease in water consumption overall, from 1,400 kL in 2017 to 1,197 kL in 2021, with an average annual reduction of approximately 3.8%. Hotels, motels and guesthouses have seen the third most significant drop in water consumption (12.5%), from 1,770 kL in 2017 to 1,548 kL in 2021, with an average annual reduction of approximately 3.3%. Lastly, holiday units managed to shrink water consumption by 13.1%, from 294 kL in 2017 to 256 kL in 2021, with an average annual decrease of 3.4%.

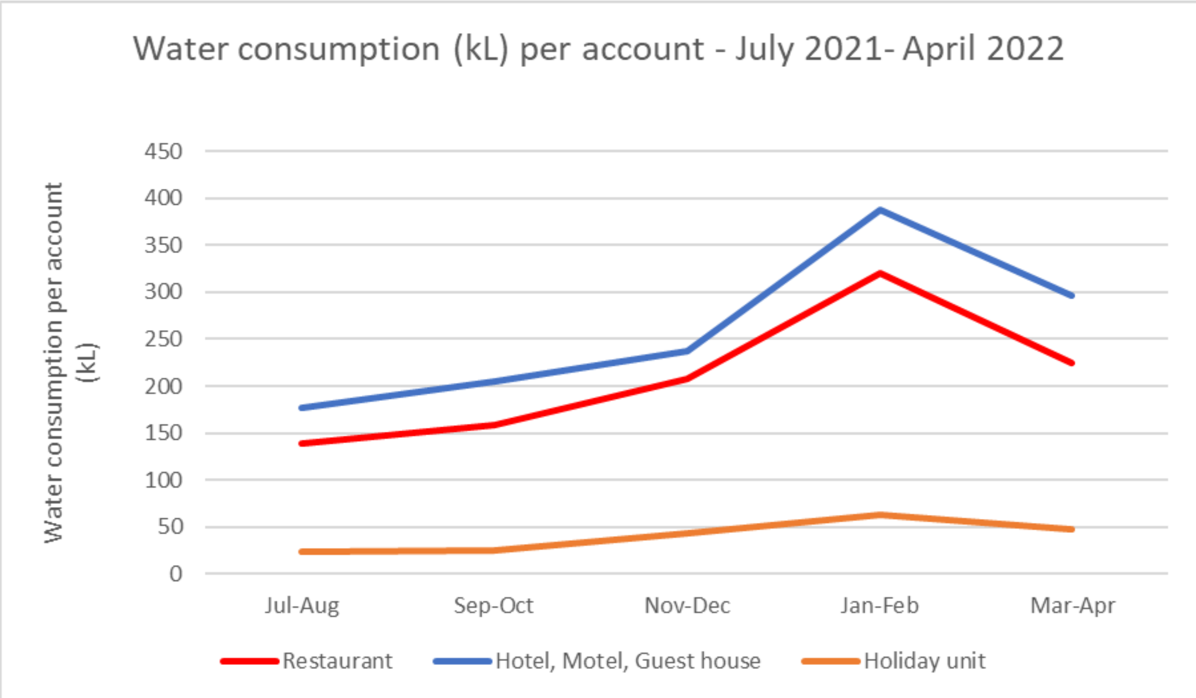
Figure 53. Average Volume of Water Consumption per Account for Tourism and Hospitality Related Businesses in Parts of the Margaret River Region (Water Corporation Accounts), 2017-2021



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-Gnarabup-Prevelly and Yallingup-Dunsborough. Data collected and provided by Water Corporation (2022). Own elaboration and illustration.

Figures 55 and 56 below show water consumption for tourism and hospitality-related businesses during different periods of the year. The graphs suggest that hospitality businesses in the Margaret River region consume the most water during the summer months, from November to February. Contrarily, the winter months (from June to September) represent the period with the region's least water consumption by hospitality businesses. Specifically, in the 2021-2022 period, water usage peaked between January and February, with restaurants consuming 320 kL of water, hotels, motels and guest houses using 388 kL of water and holiday units consuming 43 kL of water. In the same period, water usage reached a trough between July and August, with restaurants using 138 kL of water, hotel, motel and guest houses consuming 177 kL of water and holiday units using 24 kL of water.

Figure 54. Average Volume of Water Consumption per Account for Tourism and Hospitality Related Businesses in Parts of the Margaret River Region (Water Corporation Accounts), July 2021- April 2022



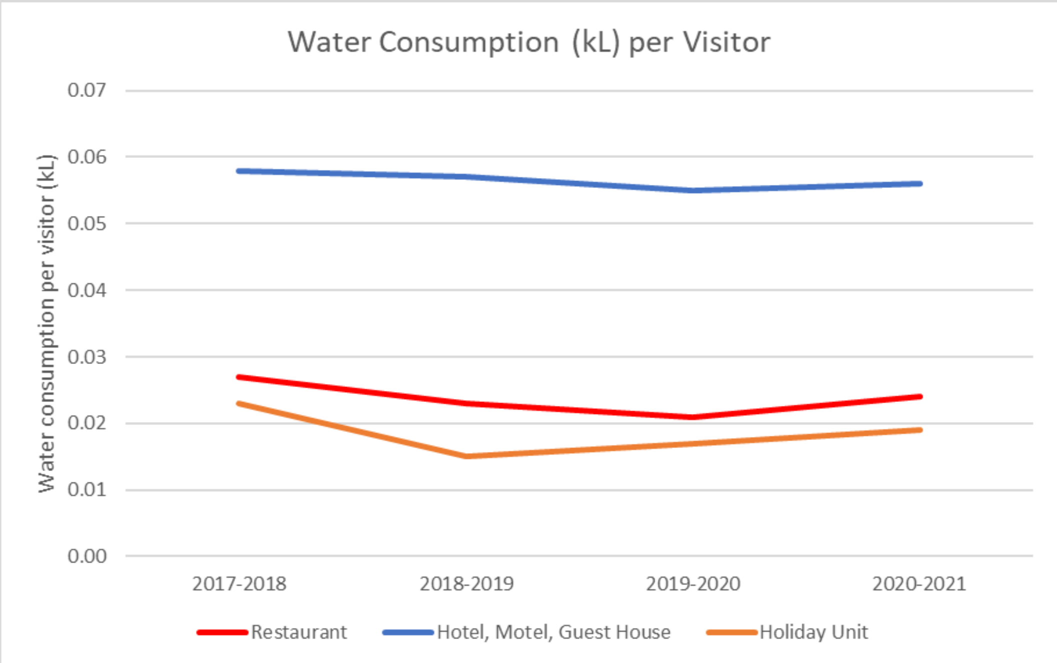
Note:Data shown in the figure represents average water consumption per account for different tourism and hospitality business types. Areas covered include Augusta, Cowaramup, Margaret River-Gnarabup-Prevelly and Yallingup-Dunsborough. Data collected and provided by Water Corporation (2022). Own elaboration and illustration.

Figure 55. Average Volume of Water Consumption per Account for Tourism and Hospitality Related Businesses in Parts of the Margaret River Region (Water Corporation Accounts), Period 1 to Period 6 2017-2022

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-Gnarabup-Prevelly and Yallingup-Dunsborough. Data collected and provided by Water Corporation (2022). Own elaboration and illustration.

Figure 57 below shows the decline in water consumption if divided by the number of visitors in the region for different types of tourism and hospitality businesses since 2017/2018 (but the downward trend seems to have come to a hold in 2020/2021). 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 Shire of Augusta-Margaret River. In contrast, the water readings only cover parts of the region. For restaurants, the sum of overnight and domestic day trip visitors has been used as the denominator. Differently, for holiday units and hotels, motels and guesthouses, only the number of overnight visitors has been used as the denominator. This calculation is only a very rough approximation and would not be accurate in absolute terms of per capita consumption. However, it provides a valuable 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. As seen in the figure below, water consumption per visitor for hotels, motels and guesthouses decreased by 3.4% between 2017-2018 and 2020-2021. In the same period, restaurant water consumption per visitor shrank by 11.1%, while holiday units reduced water consumption per guest by 17.4%.

Figure 56. Average Volume of Water Consumption per Visitor for Tourism and Hospitality Related Businesses in Parts of the Margaret River Region (Water Corporation Accounts), 2017-2018 to 2020-2021



Note: Data shown in the figure presents the 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 (2022). Visitation numbers are taken from the IVS and NVS, Tourism Research Australia. For hotels, motels, guest houses and holiday units, overnight tourists have been used in the denominator; for restaurants, the sum of overnight and day trip 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.

The Water Corporation and Busselton Water (which manages the water supply across the wider Busselton area) acknowledge Waterwise businesses for their commitment to water efficiency through an annual recognition event. For instance, the Ramada Resort by Wyndham in Dunsborough was recognised for its efforts to reduce water consumption (Busselton Water n.d.). In 2019, the resort completed a comprehensive business-wide water audit and saved almost 4,000kL of water during the year.

Water-saving efforts undertaken by the resort include:

- Installing water-saving showerheads in all 84 showers;

- Replacing an existing 20,000-litre water tank as well as a pool pump;
- Removing high-water needs plants from the gardens and looking for native planting opportunities across the entire resort;
- Reviewing the current reticulation system, which resulted in removing 200 watering heads; and
- Streamlining watering periods, including reducing watering time for lawns and gardens.

4.7. Solid Waste Management

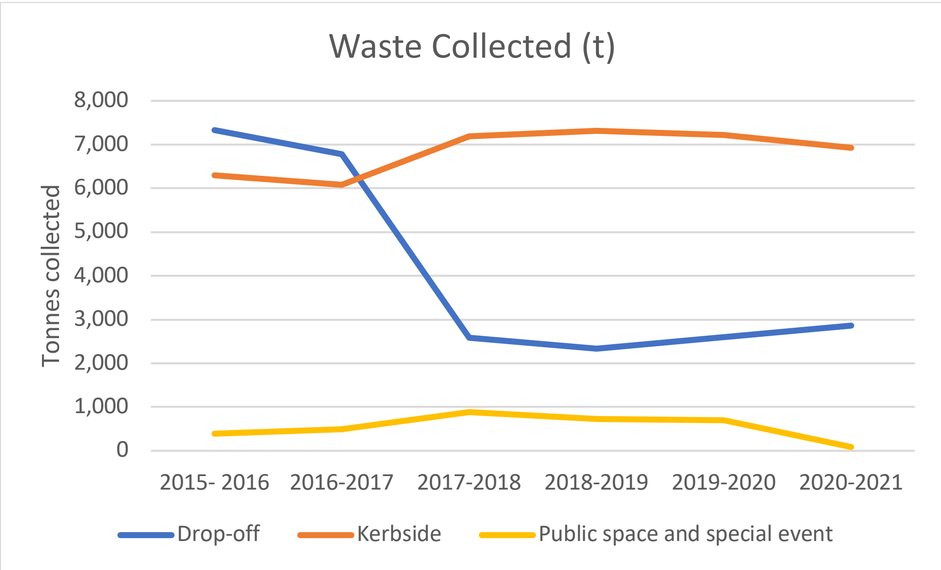
Sustainable waste management in the South West region follows the guidelines of 'The Waste Avoidance and Resource Recovery Strategy 2030' by the WA Waste Authority. This strategy encourages businesses and local communities to work toward three objectives: (1) 'Avoid', (2) 'Recover' and (3) 'Protect' (WA Waste Authority, 2021). The Shire of Augusta- Margaret River introduced several strategies during 2019/2020 to improve landfill diversion rates. For instance, introducing the three-bin FOGO (Food Organic Garden Organic) kerbside collection in 2019 enabled the Shire to improve landfill diversion rates from 22% to 58% (Shire of Augusta-Margaret River, 2019). Other waste reduction strategies include:

- Implementing waste education for locals.
- Developing a waste education campaign for visitors.
- Investigating commercial waste audits to help businesses address waste streams.
- Continuing to implement a commercial three-bin program and work towards making it mandatory.

Mandatory reporting was introduced in 2019-20 leading to improvements in data quality. Prior to 2019-20, data was voluntarily reported, and is therefore less reliable. According to the Shire of Augusta-Margaret River (2019), waste contributed 4% to the total carbon emissions in the region. In 2020-2021, the Shire collected almost 10,000 tonnes of waste, which seems to indicate a 30% decrease from the waste collected in

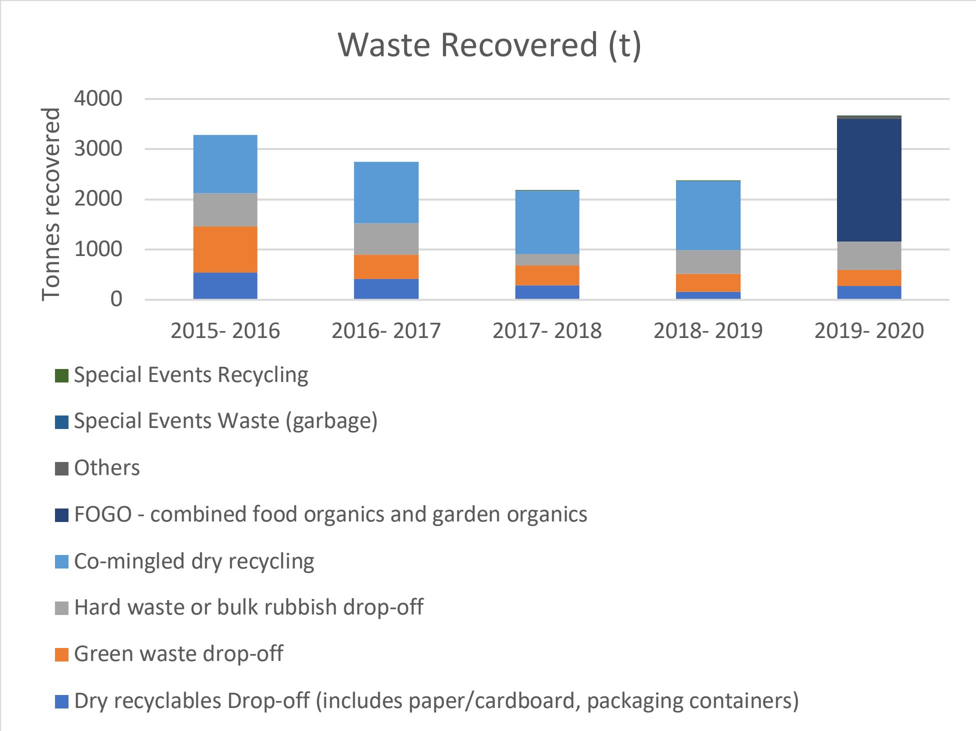
2015-2016 (see Figure 57 below). However, given the change in data collection described above, it is not possible to determine whether this decrease in waste generation was 'real' or due to a data reporting anomaly. Looking at the latest data of waste recovered, there was a domestic recovery rate of 48% in 2019-2020 and of 55% in 2020-21. This represents a significant increase from 2015-2016 (see Figure 58 below).

Figure 57. Total Weight of Waste Collected in the Shire of Augusta-Margaret River, 2015-2016 to 2020-2021



Note: Data shown in the figure represents total waste collection (t) collated by WA Waste Authority (2021). Own illustration.

Figure 58. Total Weight of Waste Recovered in the Shire of Augusta-Margaret River, 2015-2016 to 2019-2020



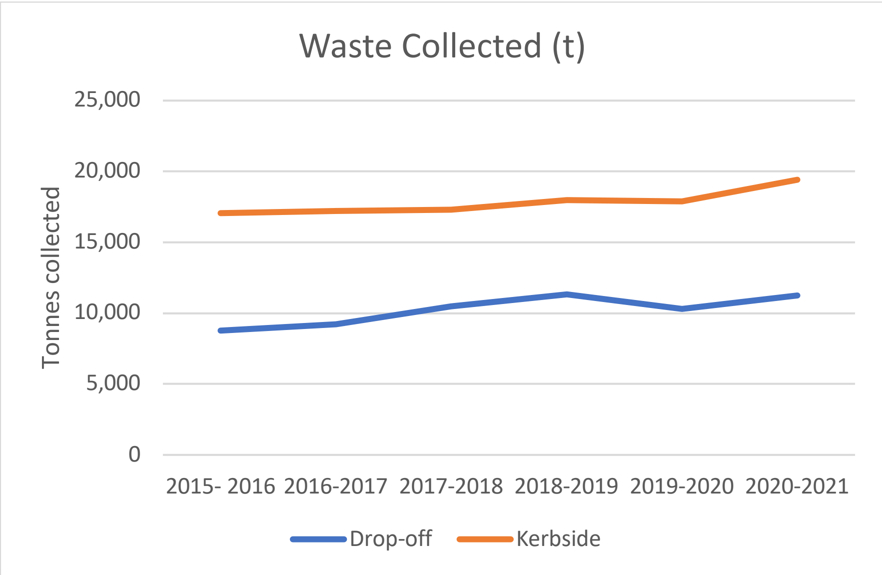
Note: Data shown in the figure represents total waste recovered (t) collated by WA Waste Authority (2021). Own illustration.

From a tourism perspective, the Shire of Augusta-Margaret River encourages every event to provide a water refill station so that attendees don't have to buy single-use water bottles (Shire of Augusta-Margaret River, n.d.). Further, 'Responsible Cafes' represents an additional initiative to minimise waste disposal. Founded in 2013, 'Responsible Cafes' provides coffee shops and other food and beverage outlets with tools and a platform to reduce their ecological impact and improve sustainability (Responsible Cafes, n.d.).

Similarly, the City of Busselton educates the business community about waste improvement and recycling efforts. The city's strategy to increase landfill diversion builds on five objectives: (1) Avoid, (2) Reduce, (3) Reuse, (4) Repair and (5) Recycle (City of Busselton, n.d.). According to data collated by the WA Waste Authority, the City of Busselton collected more than 30,000 tonnes of waste in 2020-2021). Looking at the latest data of waste recovered, there was a domestic recovery rate of 33% in

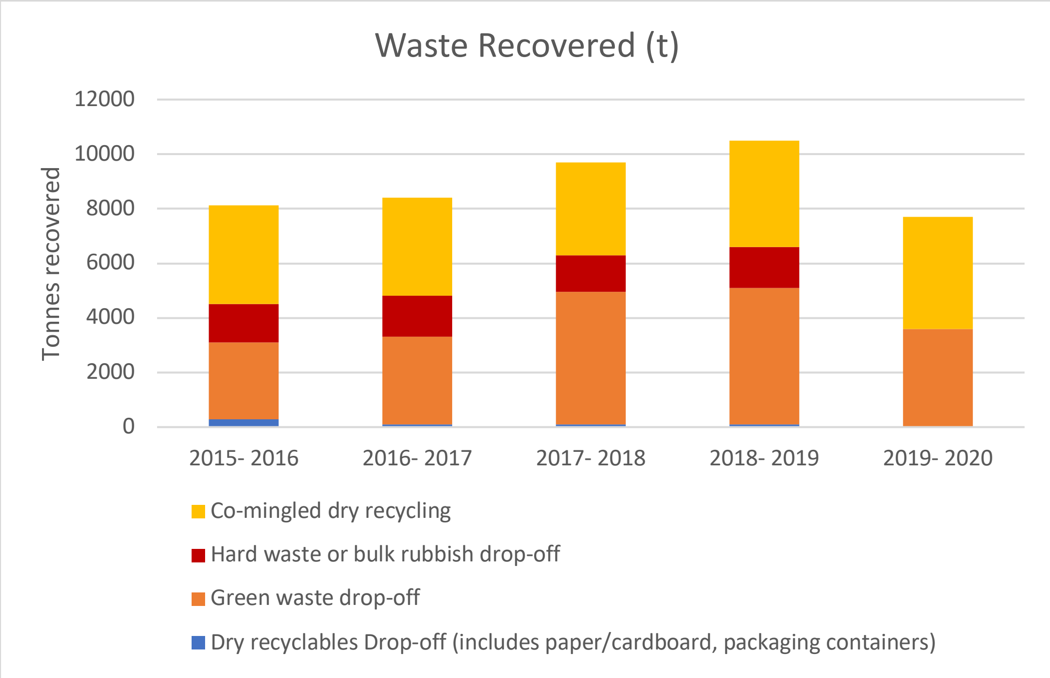
2020-2021. The recovery rate in the City of Busselton has remained fairly stable since 2015-2016 (see Figures 59 and 60 below).

Figure 59. Total Weight of Waste Collected in the City of Busselton, 2015-2016 to 2020-2021



Note: Data shown in the figure represents total waste collected (t) collated by WA Waste Authority (2021). Own illustration.

Figure 60. Total Weight of Waste Recovered in the City of Busselton, 2015-2016 to 2019-2020



Note: Data shown in the figure represents total waste recovered (t) collated by WA Waste Authority (2021). Own illustration.

4.8. Inclusion and Accessibility

To address inclusion and accessibility, this section presents an analysis on travel accessibility in the Australia's South West and addresses the promotion of inclusive travel for people with disabilities in a popular tourism destination.[2] [3]

[2] This section is based on a report authored by Sara Cavalcanti Marques. The author would like to thank the invaluable contribution and feedback of Sarah O'Mara, Founder of Flare Access, and Ben Aldridge, Founder and Managing Director of 30 Foot Drop, and for their support in ensuring this project was executed with the needs of the disabled community at the very core. A sincere thank you is extended to all of the survey advisors for their careful review of the survey instrument from the perspective of people with disabilities. The author would also like to thank the disability and accessibility advocates who agreed to take part in the study's interviews, and to all organisations, advocates and communities who assisted with the promotion the survey, including: Flare Access, 30 Foot Drop, Office of Senator Jordon Steel-John, Intelife Group, Enable Western Australia, Disability WA, Forward Ability Support, Accessible Travel Club, People with Disabilities WA, Disability Advocates SCIU, Australian Disability Ltd Discussion Group, Voices of the NDIS, and Accessibility for Disability Changemakers.

[3] This report uses the terms person/people with disability(ies) and disabled person/people, interchangeably, as preferences differ between identity-first and person-first language when addressing disabilities. As a non-disabled researcher, the author is led by, respects and affirms each individual person with disability's choice of language they use about themselves. It is also important to acknowledge the online survey employed in this study may not have been accessible to all people with disabilities. It is important to recognise the limitations of this study in supporting everyone's needs. The survey was developed with the review of people with a disability, but at this time, for instance, the inclusion of Auslan interpretation into the project was not possible. We will continue to strive to make our research tools more accessible, and have encouraged those willing to participate but who found

4.8.1. Introduction and contextualisation

The World Health Organization (WHO) estimates that over one billion of the world's inhabitants (15%) live with some form of disability (World Health Organisation, 2011). Being able to experience and enjoy the planet's resources by having access to them is a right constituted under article 7 of the United Nation's World Tourism Organization's (UNWTO) Global Code of Ethics for Tourism (GCET) (UNWTO, 2020). Furthermore, also within the scope of UN provisions, many of the articles that constitute the United Nations' Convention on the Rights of Persons with Disabilities (CRPD) are directly related to the concept of inclusive or accessible travel and tourism. The right to live independently and to be included into the community (article 19); the right to personal mobility (article 20); and the right to participation in cultural life, recreation, and sport (article 30) are among some of the relevant precepts enshrined in the document (UNDESA, 2022). However, accessible travel and accessible tourism are concepts that transcend the realms of human rights, morality, and ethics in the sense that great economic opportunities await those who invest in the market segments that cater to the needs of the demographic concerned.

According to a report published in 2016 by the UNWTO, the multifaceted nature of the economic opportunity manifested by the accessible travel market is appealing for the following reasons: persons with disabilities tend to travel with companions (many times these companions are carers) or in groups, they are more likely to make return visits, they routinely travel during the low season, and in certain regions of the world they are known to spend more on their travels than the average traveller (UNWTO, 2016). These upsides and opportunities play right into some of the tourism industry's vulnerabilities as a potential antidote to them. The business prospects of the accessibility market are wide-ranging and in addition to the diverse community of persons with disabilities, beneficiaries of accessible tourism also include those who momentarily face mobility constraints, such as people in later stages of their pregnancies and those with class III obesity, and families with very young children (UNWTO, 2021). Furthermore, global demographic projections indicate that the

that the format used was not accessible to them to get in touch with directly to work out alternative pathways. Please note alt text is available for all figures in this report.

elderly will become an increasingly prevalent parcel of the population in the coming decades; in fact, the United Nations Department of Economic and Social Affairs (UNDESA) states that by the year 2050 the number of people aged above 60 years will have leaped from 11% of the population to 22%. Members of this age group have, more often than not, particular needs with regards to accessibility and therefore also benefit greatly from accessibility initiatives (UNDESA, 2019).

A 2018 survey carried out by the Australian Bureau of Statistics (ABS) indicated that, at the time of publishing, 17.7% of the Australian population lived with some form of disability, which suggests that the percentage of individuals with disabilities in Australia exceeded that of the current global figures. Furthermore, the survey demonstrated the strong correlation between an aging population and disability, indicating that 49.6% of members of the population who are aged 65 and above had some form of disability. The instrument also highlighted that 3.9 million people (15.9% of the Australian population) were placed in this age group (ABS, 2019). Improving accessibility in WA can potentially go beyond simply serving as a good example to other regional destinations, it offers the region an opportunity to stand out competitively in what has been a neglected segment of the industry.

The last available overnight visitor factsheet produced by Tourism Western Australia prior to the coronavirus pandemic provides an important insight into the nature of tourism in Western Australia. In 2019, the state received 3.26 million travellers whose visit lasted an average of 3.6 days. The fact sheet portrays that tourist's total annual spend in WA's South West summed AUD$1.725 billion prior to Covid-19. Holiday travels are listed as the prevailing purpose of travel to Australia's South West across the board for all visitor markets (intrastate, interstate, and international). Intrastate visitors make up the majority of travellers to the South West, making up 86% of all tourists. Interstate and international visitors make up 8% and 6%, respectively. Eighty one percent of interstate travel to the South West originates in three territories: Victoria (32%), New South Whales (30%), and Queensland (19%) (Tourism WA, 2020). Disability prevalence in all three of these territories are above the global average of 15 percent (ABS, 2019). As for international visitors, 41 percent originate from three main nations: United Kingdom (19%), Singapore (14%), and Malaysia (8%) (Tourism WA, 2020). The Department of Work and Pensions of the UK ascertains in its 2019-2020 Family Resource Survey that 22% of Britain's population have a limiting long-term illness, impairment or disability (DWP, 2021). As for Singapore, its Ministry of Social and Family Development (MSF) states that 18.8% of its population are comprised of persons with disabilities (MSF, 2018). In Malaysia the prevalence of persons with disabilities reported by the Department of Statistics of Malaysia is slightly smaller, at 14.3 percent (DOSM, 2018).

Tourism Research Australia maintains that the current Australian accessible tourism market benefits 14% of Australia's population; this is due to the fact that one must account for those who accompany the 7% of the disabled population who travel and do so in the company of friends, family, and carers. With this in mind, it is estimated that this sector alone is likely to be worth a yearly $8 billion according to the Australian National Visit Survey (NVS) (TRA, 2018). However, despite the urgency, moral imperativeness, and all of the promising attributes of business opportunities, there is still a significant shortage of specialized dedicated research initiatives to shed light on the accessibility of travel, particularly in Australia's South West, one of the state's most popular tourism destinations.

As such, the project aims to assess the accessibility of travel in Australia's South West, explore perceptions of travellers with access needs regarding travel experiences in the destination, highlight challenges and opportunities for the accessibility of travel in the region, and recommend ways to enhance accessibility within the destination.

To meet these aims, the project consisted of two key components:

1. Open-ended expert interviews conducted with tourism stakeholders, shire employees, parliamentary advisors, and accessibility consultants.
2. Online survey targeting people with disabilities to collate travel experiences in the study region.

4.8.2. Accessibility advocates and tourism stakeholders' perspectives on travel accessibility

Methodological note*:* Qualitative expert interviews

In-depth qualitative interviews were conducted with a number of selected experts on accessibility in the study destination to capture the current state of affairs in the region. Interviewees were carefully selected to represent stakeholder perspectives in the region and to capture the outlooks of service providers from a range of different backgrounds. We interviewed accessibility consultants, shire community coordinators, member for parliament representatives and tourism providers and operators in the region.

The criteria for selecting expert interviewees was their knowledge on disability and accessibility, and their involvement and familiarity with the Australia's South West tourism destination. The interviews were conducted online between 2021 and 2022, took between 30 to 60 minutes each, and were conducted in a semi-structured format with open-ended questions, allowing respondents to convey their own opinions about specific topics in an unhindered manner, enabling them to develop the conversation in their particular area of interest and expertise. Openness is a key requirement of qualitative interview techniques as it assists interviewees to voice their own problem definitions, descriptions of reality and suggestions for solutions (Gephart, 2004). Questions revolved around topics such as opportunities of making travel more accessible, main challenges inhibiting travel from being more accessible in the region, barriers for tourism providers, key areas for improvement, and best practice examples.

Interviewees' identities were kept anonymous in order to protect the integrity of participants. Interviews were recorded with the consent of participants, transcribed and systematically explored by means of a thematic analysis (Braun & Clarke, 2006). This method enables the analysis of qualitative, open-ended interviews on a categorical basis and hence supports the identification of statement patterns in the overall set of interviews. Thus, the focus is on the comprehensive set of interview statements from all participants rather than on a single interviewee's statement. Based on this principle, the analysis transcends the individual respondents and treats the whole interview set holistically as statements are grouped on a thematic basis, not on the basis of who spoke (Pechlaner & Volgger, 2012).

Results and discussion

Here, the findings from the expert interviews are discussed according to the key themes identified in the conversations:

- Accessible tourism: what it is it and what are the opportunities
- Accessibility in ASW
- Challenges and barriers for accessibility in travel
- Pathways forward

Accessible tourism: what it is and what are the opportunities

Accessible tourism was largely described by interviewees as the opportunity for people with disabilities and their family and friends to be included in the scope of travel possibilities. This means the option for disabled people, regardless of their disability, to go on similar kinds of holidays as non-disabled people, not having to miss out on activities due to access needs not being met, and having the ability to navigate a place or event as independently as possible. Accessible tourism was seen as going far beyond accessible physical infrastructure, rather, encompassing every step of the visitor's journey, from planning, to provision of services, through to interactions between travellers and operators.

> *"It means [accessible tourism] myself, my family, my friends, being able to just pack up and go on holiday. Being able to go to a place and experience everything that the place has to offer without feeling excluded or segregated."* (Interviewee)

With regards to the opportunity of making travel more accessible, interviewed participants claimed there are prospects both for the disabled community as well as for the businesses themselves. With one in five Australians presenting some form of disability, interviewees asserted that this significant portion of the population should not only have the right to enjoy stress-free travel, but that it also presents an immense economic opportunity in a vastly untapped market. An accessibility consultant defended that, to a large extent, people with disabilities don't travel as much as they'd ideally like to, due to lack of inclusiveness in tourism offers, rather than financial constraints. An expert added that the economic opportunity is further enhanced due to the fact that people with disabilities normally travel in groups, meaning a number of bookings often accompany a booking made by a disabled person. Further to this, for businesses, increasing accessibility for people with access needs was seen as enabling them tap into social values that boost overall business reputation. Finally, by promoting accessibility for people with a range of disabilities, offers tend to also become more inclusive for all, including aging demographics, international travellers, young children, and families with prams, thus catering to a larger number of potential customers.

> *"You can't pay the bills with moral obligation, so we try to change the conversation into an economic one – This is why you're doing it: because in order to keep an edge over your competition, you need to be inclusive. […] For us in the Southwest, it became a no-brainer; that the tourism industry was a great place to start [accessibility awareness education]. The reason that they [disabled community] are not travelling, it isn't finical, it's just that it's too bloody hard, or there aren't the accessibility options that they require."* (Interviewee)

> *"For every person with access needs who travels, two to three people travel with them statistically, so if you are not providing the information that person needs to easily be able to book, or if you don't make small tweaks in order to meet that person's access needs, not only are you missing out on that one person with the disability, you're missing out on two or three other people who travel with them as well."* (Interviewee)

Accessibility in Australia's South West

The Shire of Augusta-Margaret River, within the Australia's South West tourism destination, has been recognised for the accessibility of its offers. The Shire has been recently awarded 'Most Accessible Community in WA' under the Regional Shire/Town category for the third year, demonstrating its importance in the region. An interviewed community coordinator in the Shire attributed this to overall staff commitment to make improvements on accessibility due to the greater than average percentage of residents in the region who have access needs. This interviewee mentioned specific areas within the Shire are well above state averages, likely due to a large elderly population. For that matter, they said accessibility training is conducted with Shire staff, and rules are in place for contractors in charge of new constructions or re-developments to ensure accessibility in the built environment. Accessibility consultants are said to be involved with new projects, and a passionate community access and inclusion working group reviews all project trials from the perspective of people with disabilities to guarantee projects are developed taking into account the needs of a range of disabilities. There are a number of tourism attractions, such as the Busselton Jetty, that have undergone changes to increase the accessibility of their product. The Jetty, for instance, has included ramps to board the train with seats that flip back to accommodate for walking aids and wheelchairs, an elevator in the underwater observatory, and written material of tour audios for foreigners and those with hearing impairments.

Challenges and barriers for accessibility in travel

One of the key challenges identified by experts was the lack of standardisation and regulation when it comes to accessibility in tourism, whereby an accessible product could mean different things to different people. With no benchmark for what classifies as an accessible and inclusive offer, disabled travellers are often met with tourism products that fall short of their access needs upon arrival. This inaccuracy, in turn, was attributed to consequently feed mistrust among the disabled community regarding the reliability of services marketed as accessible, as they become hesitant to travel despite claims of accessibility.

> *"At the moment accessibility means something different to everyone. So by creating a standard that everybody can use to say 'Yes, this is accessible', or 'No, this is not accessible', or 'this is x number percent accessible', means that we can actually have a solid goal to work towards."* (Interviewee)

Similarly, interviewees pointed to (lack of) information and awareness as another significant barrier for travel accessibility. From the demand side, experts argued there is a gap in information readily available to the public, making it extremely cumbersome for a person with a disability to plan a holiday that caters to their access needs. Not being confident in the information they are provided with can be a source of anxiety for travellers with a disability, and many times may even dissuade them from travelling altogether. One expert noted there is a wealth of accessible infrastructure to cater to people with a range of needs in Australia's South West, however the gap in communication prevents the target market from accessing and benefitting from it. On the other hand, from the supply side, participants suggested there is a lack of knowledge about the economic opportunities of making offers more accessible, as tourism providers don't often realise the size of the market and their economic buying power. For many providers, accessible tourism is still seen as a high-risk venture. Additionally, despite good intentions, providers don't often know what changes are necessary to cater to those with access needs. Supply-side challenges were largely linked to lack of localised data available supporting accessibility and its importance.

> *"At the moment they [tourism businesses] are not aware of the potential of this particular market. One thing that is missing […] is the lack of relevant relatable local data, that can be put in front of tourism providers. Having this localized data is really going to help with that. The tourism industry can be really great at innovation in the areas that they know. At the moment they don't know disability, so therefore the innovation isn't happening. What we are trying to do is create an instance where the value of accessible tourism products or accreditations present such good deal that it overcomes their hesitation."* (Interviewee)

From the supply side, another barrier raised was the high cost of installation requirements and maintenance costs, which was also seen as a deterrent for accessible tourism, specially considering most operators in Australia's South West are small family-owned businesses. Experts also suggested the quality of service towards disabled people generally tends to be poor, stemming from social stereotypes and assumptions on how to treat people with access needs. Often this behaviour discourages potential visitors from engaging in future travel plans.

> *"Even those who are travelling aren't travelling as much as they want to because it is so hard. The people on the other end need to understand what it is that we need, but also at the same time, people with disabilities aren't aware of what we are actually capable of doing. For centuries we have been pushed and told that we are unable to do anything. We need to be inspired, we need to be shown, we need to be informed as to what is possible for us to do. The people with disabilities need to be educated; the tourism providers and the planning services need to be educated."* (Interviewee)

In Australia's South West in particular, the rugged landscape was seen as a challenge for accessibility. Further to this, outdoor activities can be very off-limits for people with disabilities because they don't want to feel like they are holding back their friends and family in an outing, even if that activity is marketed as accessible.

> *"Great inclusive service actually patches over accessibility cracks really well. You can have the most accessible place but if you are treated poorly it is still going to be a bad holiday. If there are some accessibility issues but the people that are serving you are understanding, they don't speak down to you, they are willing to take in your advice or make adaptions, then that makes it great."* (Interviewee)

Pathways forward

Across the region, interviewees stated there has been a focus on the accessibility of physical infrastructure in Australia's South West (although they reinforced there is still room for growth in both public and private spaces regarding infrastructure), including that of trails and streets, parking, toilets and change rooms, caravan parks, beach wheelchairs and beach wheelchair access, playgrounds, customer-service points, recreation centres, library and cultural centres (in Margaret River). Given the focus has primarily been on the built environment, interviewed participants argued that further enhancements are required to suit other non-physical disabilities. A number of participants suggested that 'invisible' disabilities – those that are not explicit, such as hearing impairments and cognitive disabilities, are largely where further access improvements are required.

> *"Accessibility means a huge range of different things, and different things to different people. Often people think of accessibility and inclusion and they think of someone in a wheelchair, but there is a huge project on dementia-friendly communities essentially around colour-coding signs. These are specialist understandings you would never be able to account for if you aren't an expert or have lived-experience. Continued consultation is key, building relationships with people is extremely important."* (Interviewee)

Another key area for improvement for the region raised by interviewees was communication and information of what is available. With quite a bit already on offer, collating, communicating, and promoting these resources clearly and accurately in an accessible way was seen as critical. Further to this, an interviewee suggested the tourism industry should promote travel itineraries linking different attraction sites, experiences and operators that offer accessible tourism services across accommodation, wining and dining, adventure, art and culture, outdoor experiences and beyond.

Additionally, further enhancements were called for with regards to building business capacity and understanding. One participant suggested that staff training on accessibility be offered by the council in much the same way as training is offered for providers to cater to specific international target markets. Many interviewees defended that business awareness on the economic and social value of accessibility is fundamental, as well as understanding that many inclusive tweaks can be implemented at a low cost. Participants suggested that beyond legislation enforcing accessibility for all, a support network is vital to help businesses better understand the opportunities and demands of travel accessibility. To that end, reliable accessibility accreditation programs and support for organisations that educate and audit accessibility of spaces were both raised as key aspects contributing to business accessibility development in Australia's South West. Participants discussed that government funding and subsidies also play a critical role in assisting businesses implement more costly accessibility enhancements.

> *"There are strategies at federal, state, and local levels in place for accessibility and inclusion; they all acknowledge its importance, but this doesn't necessarily carry over into businesses. The government provides support for businesses regarding workshops about taxation, social media management, but not much regarding accessibility. There are no grants for businesses in order to fund investments in accessibility features."* (Interviewee)

In terms of services and tourism offers, one interviewee spoke about the importance of aesthetics in accessible hospitality, whereby spaces available to people with disabilities do not look clinical but inviting and pleasing to the eye. Similarly, visitors with disabilities should be made to feel included and welcome in the tourism destination, and not treated as abnormal.

When it comes to actioning pathways to increase the accessibility of travel in Australia's South West, the consensus from experts it that co-design and consultation with the disabled community is fundamental. Participants alerted that what may be accessible for one person may be completely inaccessible for someone else with another kind of disability, highlighting the importance of involving consultants and advisors across various disabilities.

> *"Co-design should be prioritized throughout the entire process of creating accessible travel. Past accessibility initiatives around the world have been brought forward individually and focus on only one aspect of the accessibility challenge. In order to work, projects must be built up incorporating the various aspects of the accessibility challenge, even though this implicates projects that have a broader scope at a large scale."* (Interviewee)

4.8.3. People with disabilities' perspectives on travel in Australia's South West

Methodological note*:* Visitor experience survey

Data on disabled visitor perceptions regarding travel accessibility in Australia's South West was collected via an online visitor experience survey.

The online questionnaire targeted people with disabilities who had previously travelled to the study region, or would consider travelling there in the future. The instrument also targeted family, close friends and carers of those with a disability, if the disabled person in question was unable to answer the questionnaire themselves. Participants who did not fall under these categories did not participate in the study. The survey included both open and closed questions and was open to the public on Curtin Qualtrics between 25 February and 20 April 2022. To ensure the survey was representative of the lived experience of people with a range of different disabilities and relevant to their needs, the survey was elaborated together with two accessibility consultants, and later reviewed by three advisors with different disabilities. The language adopted in the survey as well as the question structure, formatting, and image descriptions were created to be as inclusive as possible, however, despite these efforts, it is important to acknowledge that survey was still not 100% accessible for all whilst it was public. Participants were encouraged to contact the researchers if the survey did not meet their access needs in order for the team to work out an alternative to enable their participation. The questionnaire collected information on demographics, access needs, travel behaviour, and experiences/perceptions of disabled visitors' travel in Australia's South West.

Participants were recruited by means of ongoing survey promotion via disability support and accessibility channels and pages, based mainly in Western Australia in order to target a local audience. Overall, 14 different organisations, groups and pages collaborated to promote the survey to their audience. In total, 42 participants completed the survey. There were a number of other important online surveys being shared in some of these groups at the same time as the study's survey was being circulated, so it is important to note that the disabled community is a highly surveyed group, which may overwhelm and tax the audience, thus impacting on participation numbers. In retribution for participation in the study, those who completed the questionnaire were entered into a draw that randomly awarded two winners, who each received a $100 online gift card voucher.

Results and discussion

Findings are displayed according to the following categories:

- Sample demographics
- Access needs
- Travel behaviour
- Perceptions of travel in Australia's South West

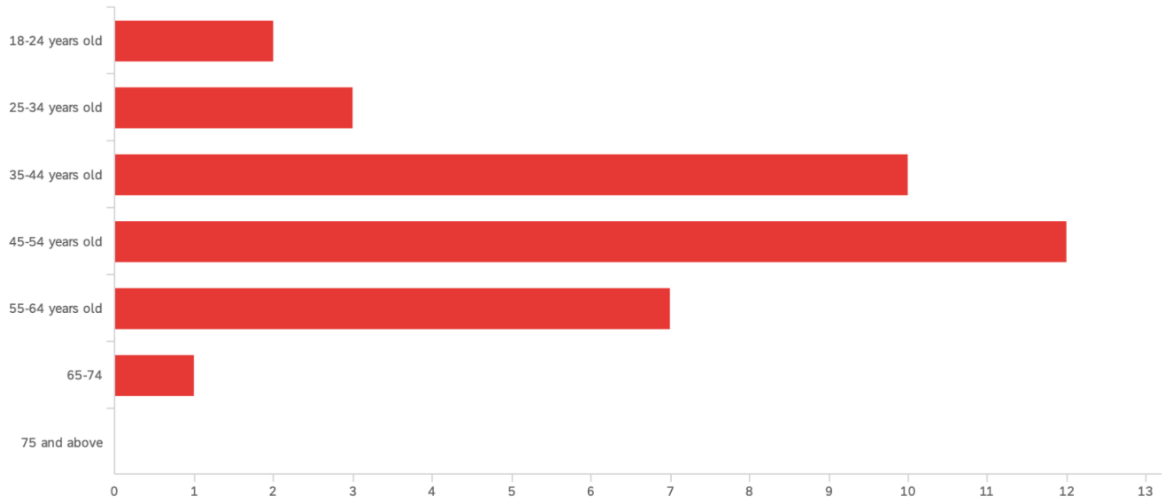
Sample demographics

Of the surveyed respondents, the great majority were people with a disability (74.29%), demonstrating the representativeness this research has in terms of visitor perceptions with lived experience (Figure 62). The remaining respondents were evenly distributed between either carers of a disabled person, or family members or friends of a disabled person. Participants who were neither of these were exited from the survey and prevented from participating. Participation was highest from respondents aged 45-54 years old (34.29%), and 62% of respondents were between 35 to 54 years old. Approximately 14% were between 18-34 years old, with respondents up to 24 making up only 5.7% of the sample. No participants were aged 75 and above, and only 1 respondent was aged between 65-74. Exactly 20% were aged 55 to 64 (Figure 63).

Figure 61. Identity of Respondents

Note: Own elaboration.

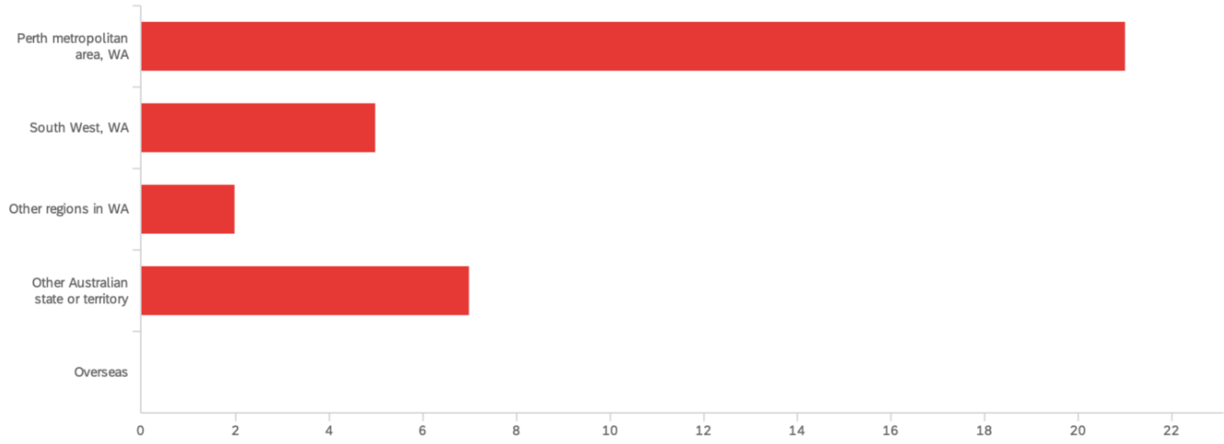
Figure 62. Age of respondents



Note: Own elaboration.

The visitor pool consisted mainly of WA residents (80%), ensuring localised data for this destination-based study, something that is largely lacking in accessibility research in Australia (Figure 64). Most were based within the Perth Metropolitan area (60%), followed by 14.3% from the study site itself, Australia's South West. About 5.7% were from other regions in WA, whereas 20% resided in other Australian states and territories. None of the survey participants resided overseas during the time of responding. All survey respondents were either Australian citizens or permanent residents.

Figure 63. Respondents' usual place of residence

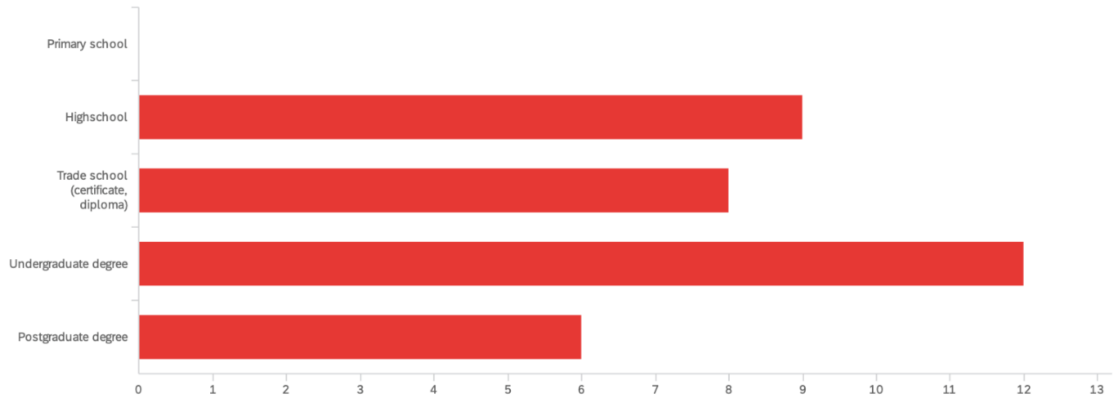


Note: Own elaboration.

When asked about the highest level of education completed, the majority responded that they had concluded an undergraduate degree (34.3%) (Figure 65). In fact, over 50% had concluded a tertiary education degree, including postgraduate programs, which is on par with the overall Australian educational average (Hughes, C., 2022). This indicates that the disabled community in WA includes a substantial group of highly skilled and educated individuals, contrary to some stereotypical beliefs. One quarter of the sample had only completed high school, and 22.9% had a trade school certificate or diploma, which may be reflective participant demographics, as a parcel was made up of young adults. In terms of the employment status of survey respondents, over 65% were employed to some degree, which is in line with Australia's national employment average of 66.4% (Australian Bureau of Statistics, 2022). Of respondents currently involved in the workforce, only 34.8% are employed full-time, which is nearly half as much as the national average of 68.8% (Australian Bureau of Statistics, 2021). Roughly 30.4% were working part-time, 13% as casual employees and 21.7% were self-employed. Differences observed between our sample in relation to the national average could relate to people with disabilities' personal employment preferences depending on their access needs, however it could also be indicative of workforce issues disabled people are faced with regarding the precariousness of working conditions. Given the majority of survey respondents were aged over 34, it is not surprising that only 8.6% of respondents were students. It is important to note however that while 11.4% were unemployed, this was due to being unable to work in that moment in time; none of the participants were unemployed yet seeking opportunities.

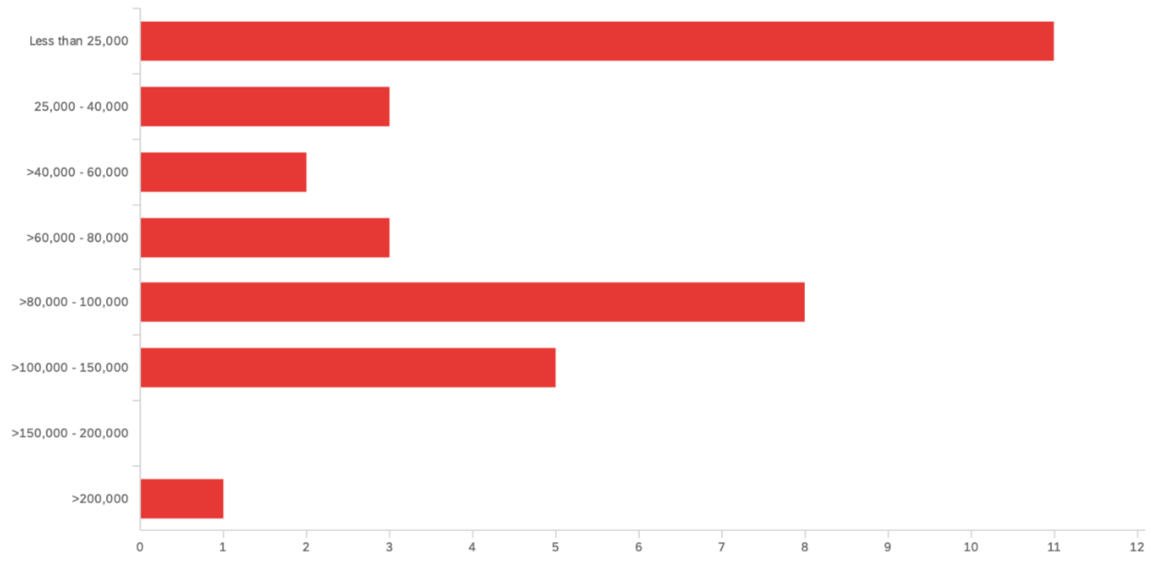
Despite the overall rate of employment being in line with the national standard, respondents' household income did not follow the same trend. Up to one third of respondents (33%) signalled their household income was less than $25k per annum. Nearly one quarter of all participants received anywhere between $25k-80k per annum, while just under 40% claimed their household income was nestled between $80k per annum to $150k. Only 3% revealed that their household income was greater than $200k per year.

Figure 64. Respondents' education level



Note: Own elaboration.

Figure 65. Respondents' household income



Note: Own elaboration.

Access needs

As for respondent's disability type, our sample was highly diverse, allowing for an overarching understanding of access needs and experiences based on different disabilities. A significant percentage of survey participants identified as having a physical disability of some kind (37%), the highest rate registered for this question. Up to 34.1% of participants had some form of mental disability, including cognitive disability, mental ill health/psychosocial disability, Autism Spectrum Disorder, intellectual disability and learning disability. There was also participation from those with chronic medical conditions (9.6%), speech and language disabilities (8.2%), blindness or low vision (5.48%), acquired brain injury (1.4%), deaf or hard of hearing (1.4%), and other (i.e. brain tumour, multiple sclerosis and diabetes) (2.7%).

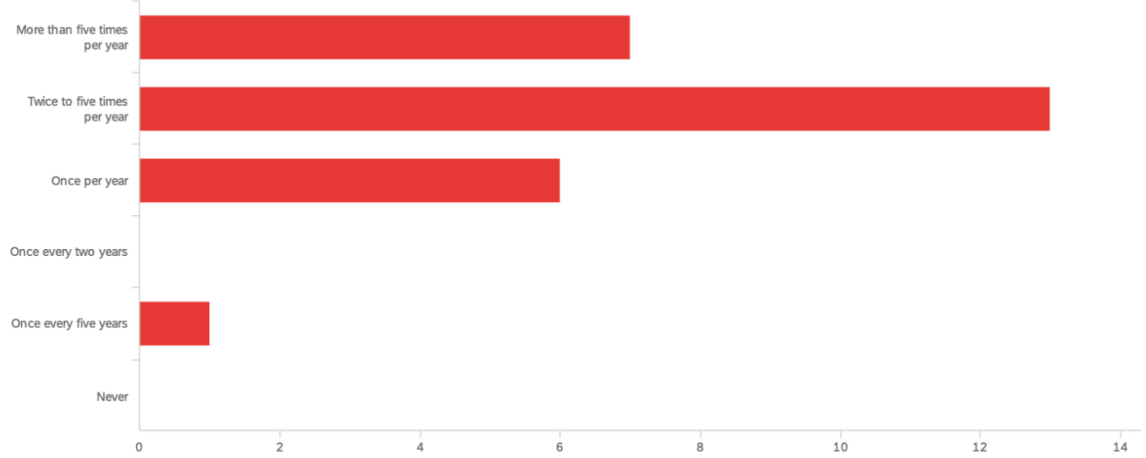
Only 3.8% of surveyed participants did not rely on any devices, aids and strategies to carry out daily tasks; the large majority recurred to a range of different assistive devices to conduct activities on a daily basis. Given the large number of people with physical disabilities, wheelchairs and mobility scooters were the most used items/ assistive services (21,7%), followed by support worker or carer (16%), bathroom adaptive equipment (11,3%), walking frames, walking sticks and/or crutches (10.4%), and electric bed (7.6%). Additional devices used to a lesser extent included hearing aid, hoist/lifter, large print, computer device, quiet room/dark room, service dog, white cane, screen reader and ostomy or ileostomy bag. There are a number of other devices that are essential for people with other disabilities that may not have been sampled in our pool but are not less important. This diversity in disabilities and tools used demonstrates the importance of destinations being ready to assist with a broad range of access needs, as each user will require a different set of aids in order to enjoy the destination freely and fully.

Travel behaviour

In terms of travel behaviour, only 8.8% of sampled participants feel fully independent when travelling, likewise, the same percentage requires maximal assistance (receive assistance for approximately 75% of activities) and again the same parcel is considered completely dependent. The largest concentration of participants is placed under minimal assistance (38.2%), followed by those that require moderate assistance (35.3%). This is consistent with the point raised by experts that states that for every person with a disability who travels, there is likely a group that travels with them. In fact, our survey showed that 84.5% of people with disabilities travel accompanied, either by a partner, by family or friend groups, or with a carer or support worker.

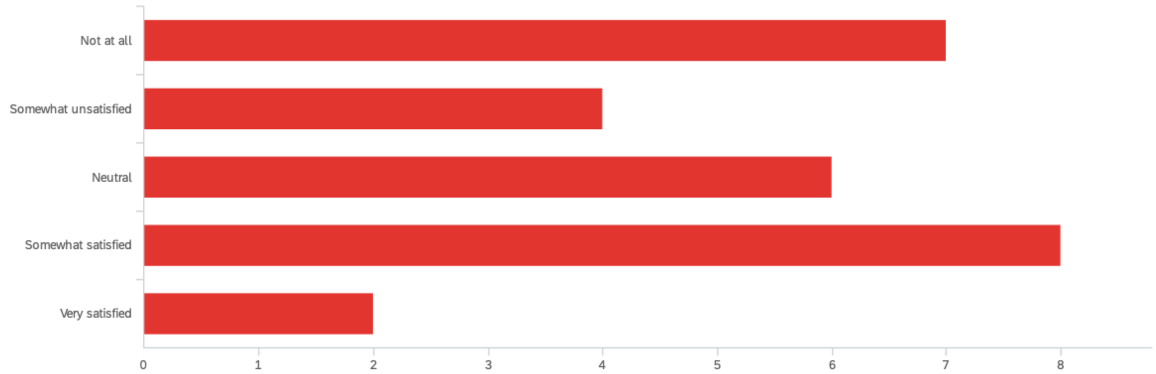
With regards to the usual frequency of travel, participants tend to go on trips quite frequently (under normal conditions, excluding the advent of a pandemic) (Figure 67). Nearly 50% of participants claim they travel between two to five times per year (travel here is considered trips involving at least one overnight stay), and over a quarter of respondents travel more than 5 times per year. Only 22.2% travel once a year, and 3.7% travel once every five years. About 46% of participants' travel lasts on average 3-5 overnight stays. Up to 23% travel between 1-2 nights, while the same percentage travels for about one week at a time. Finally, 7.7% state they usually travel for two weeks at a time. The majority of this population (55.6%) travels largely for leisure, while 29.6% travels to visit family and/or friends. Only 7.4% travels for work or study. When asked about satisfaction with frequency of travel, although 29.6% indicated they are somewhat satisfied in this regard, the majority (over 40%) replied they are not at all happy or somewhat unsatisfied with their current travel frequency arrangements (Figure 68).

Figure 66. Respondents' frequency of travel



Note: Own elaboration.

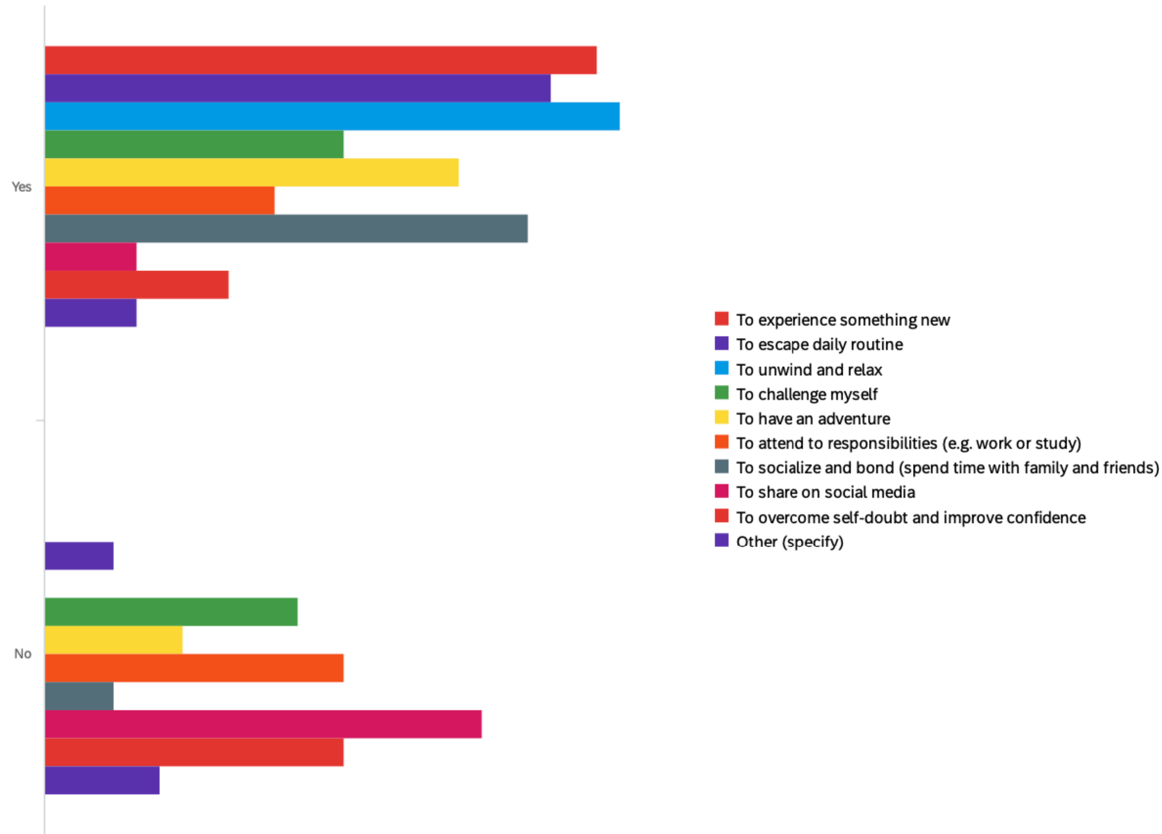
Figure 67.Respondents' satisfaction with frequency of travel



Note: Own elaboration.

When it comes to travel motivation, the key motivating factors for this sample were: to unwind and relax, to experience something new and to escape the daily routine (Figure 69). Other important factors included socialising and bonding, and having an adventure. On the flipside, factors that did *not* motivate trips were: travel to share on social media, to overcome self-doubt, to attend to responsibilities and to challenge oneself. As for variables that kept travellers from taking trips as often as they would like, key factors included the lack of money, difficulty accessing tourism offers/products that meet access needs, and difficulty sourcing information on accessibility. Other critical factors were the length of time and energy it takes to plan an accessible trip, difficulty finding accessible accommodation, lack of online accessibility when planning and booking travel, and lack of accessible transportation. The factors that did not seem to interfere much with travel frequency were lack of confidence, travel anxiety, and lack of company to travel with. Key elements that contributed to positive experiences were having confidence that the venue/service/destination actually meets access needs, and having access to accessibility information while planning the trip as well as during the trip itself.

Figure 68. Factors that motivate travel



Note: Own elaboration.

Travel experience in Australia's South West

In total, 88.9% of respondents had previously travelled to Australia's South West, of which 63.6% stated they travelled to the region more often than they can count or remember. This demonstrates that the sample was well-acquainted with the destination and had plenty of lived-experience in the study site to share.

Respondents indicated that the following factors played a key role in motivating travellers to choose Australia's South West as a travel destination:

- Convenience of travel (86.4% agreed)
- Word of mouth, good reviews from people who have visited (72.7% agreed)
- Having friends and family who live in region (63.6% agreed)
- Bucket list appeal of the destination (50% agreed)

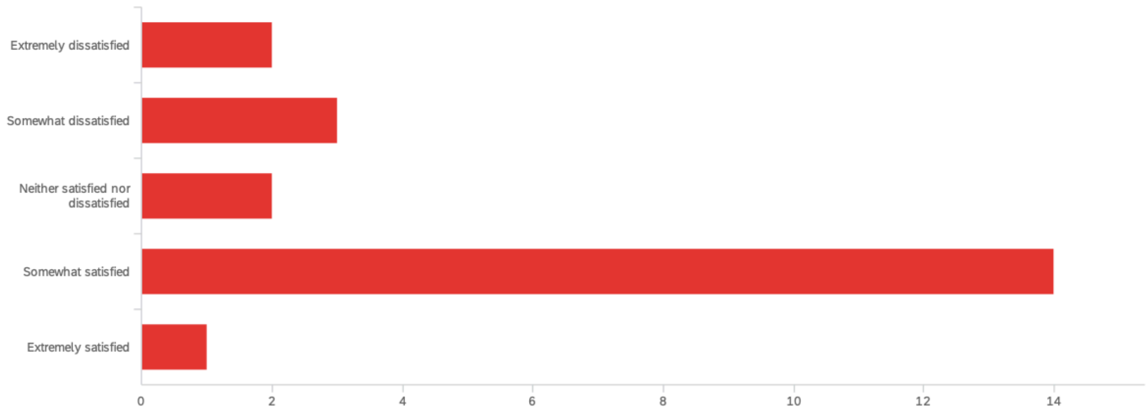
When asked which factors did *not* act as drawcards, the majority (81.8%) said that 'hearing good things from people with disabilities who have visited' was not a motivating factor.

Participants engaged in a varied range of activities during their time in the destination, illustrating how travellers with disabilities can get involved with wide diversity of undertakings when travelling. The activities travellers with disabilities most engaged with during their stay(s) in Australia's South West included:

- Dining and eating out,
- Visiting iconic attraction sites (such as the Busselton Jetty, The Gap or Tree Top Walk),
- Visiting museums and art galleries,
- Sourcing locally made products and produce, such as wines, chocolates and cheeses,
- Spending time in the forest,
- Spending time at the beach, and
- Wildlife watching/interacting.

About 63.6% of participants in the survey considered they were somewhat satisfied with their travels to Australia's South West region. Only 9.1% and 13.6% were extremely dissatisfied and somewhat dissatisfied, respectively, while only 4.5% were extremely satisfied.

Figure 69. Respondents' satisfaction with travels to Australia's South West



Note: Own elaboration.

With regards to the accessibility of a range of different offers and services, the table below illustrates the degree of satisfaction (or dissatisfaction) with each type of tourism offer. The biggest disappointments occurred with accessibility of accommodation, nature places, and of tours, as well as with the accuracy of information and ease of planning. On the other hand, the accessibility of public spaces and of museums triggered a significant level of satisfaction in guests. Overall, this demonstrates there is a lot of room for improvement with the accessibility of tourism offers in the travel destination, as five out of eight key tourism components were rated rather negatively. When asked about satisfaction levels regarding the overall accessibility of tourism offerings in the region, 54% responded they were not accessible at all or somewhat inaccessible, which further highlights the gap in tourism accessibility.

Table 7. Respondents' satisfaction with access of tourism offers in Australia's South West

Services/Products	Extremely dissatisfied	Somewhat dissatisfied	Neutral	Somewhat satisfied	Extremely satisfied
Accommodation					
Dining					
Nature places					
Access to tours					
Museums					
Public spaces					
Accuracy of info					
Ease of planning					

Key	10%	20%	30%	40%	50%

Note: Own elaboration.

Some of the key barriers encountered by participants during their travels in Australia's South West were:

- Stairways and steps
- Uneven or unpaved paths
- Lack of information on accessibility services
- Crammed or narrow spaces with poor circulation space and obstacles
- Lack of wheelchair accessible infrastructure
- Lack of accessible toilets
- Experiences of discrimination, prejudice or stereotyping
- Lack of experiences adapted to personal access needs

Nevertheless, over 80% of survey respondents alleged they would probably or most definitely travel to Australia's South West again, and less than one third (27.3%) stated they would definitely not or probably not recommend ASW to a friend or family member with a disability.

4.8.4. Key recommendations

The recommendations listed below constitute a summary of the core learnings extracted from the report's findings condensed into an overview of the most critical factors identified in the study when determining a pathway forward for the improvement of the accessibility of travel in Australia's South West. These recommendations are based on interviews with experts as well as on the quantitative market research. The recommendations are presented according to the following themes:

- Information and awareness
- Implementation
- Accessibility in spaces

Information and awareness

(1) Improve communication of what is already available: with a series of accessible services and products available in Australia's South West, it is of critical importance to collate, communicate and promote these offers clearly and accurately to the disabled community, as many may be unaware of their existence. Linking this information to popular search engines will ensure the information is easily accessible for the target market.

(2) Create accessibility travel itineraries for a range of access needs based on different travel goals (culture, adventure, outdoor, etc.), and market these experiences to people with disabilities. Having a guide that combines different components that make up the travel experience, such as accommodation, tours and dining, targeting specific access needs lessens the load on disabled people and their travel groups to ensure end-to-end accessibility of their trip.

(3) Build business capacity and knowledge via accessibility training to educate operators in the region about the economic opportunity in accessibility. The training should also inform businesses about what tweaks and changes in their offers enable them to become more inclusive, as well as guidelines on how to implement such changes. The training should also encompass quality customer service for people with disabilities.

Implementation

(4) Support an accessibility accreditation program, ideally audited by people with disabilities: beyond legislation enforcing accessibility, it is of paramount importance that accessible offers are consistently and truly what they are marketed to be. Having a reliable accessibility accreditation would help foster customer trust and avoid any unwelcome surprises. Furthermore, an accreditation program audited by people with different disabilities would also create employment opportunities for disabled people.

(5) Co-design and consult with the disabled community whenever considering new builds, products or services. Not only should current offers be audited to ensure accessibility, new projects should also incorporate consultation from people with lived experience with different disabilities with regards to access needs, as accessibility needs for one person could be completely distinct from the next.

(6) Provide support for small businesses to make necessary changes to their tourism offers in order to become more accessible, as some tweaks are costly, particularly to those with reduced revenue.

Accessibility in spaces

(7) Provide end-to-end accessible experiences for a range of different disabilities, not only physical disabilities.

(8) Ensure aesthetics of accessible offers are inviting and welcoming, rather than clinical.

5. CONCLUSION AND OUTLOOK

This is the 2022 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 Australia's South West Tourism Region, including tourism seasonality, employment, economic benefits, resident perceptions, energy management, water management, waste management as well as inclusion and accessibility. 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 findings and areas for improvement for tourism development in the Australia's South West Tourism Region include the following:

- The Australia's South West is in the top 15 tourism regions in the country in terms in terms of nights and also in terms of day visitors. As such, tourism is a relevant source of employment in the region, where employing business tend to be micro and small (i.e. up to 19 employees).
- As in many leisure tourism destinations, seasonality remains a challenge: Visitation is concentrated in the summer season, although the region offers diverse experiences that can be attractive in winter as well. This occurs because most visitors travel to the region for holiday purposes (especially international visitors).
- Residents feel that tourism makes a strong economic contribution but they also suggest to closely monitor its impact on cultural and natural assets. Residents support initiatives that maximise local benefits from tourism.
- Although residents do not perceive overall visitation numbers as overly problematic, the lack of geographic dispersal is still perceived to be a weakness of tourism development in the region.
- Concerning the environment, tourism is an intensive energy and water user, and at the same time it generates considerable amounts of waste. Some initiatives in the region are targeting these aspects.
- Shires and not-for-profit organisations in the region are working together to achieve better energy management practices while tourism enterprises are

adopting a number of practices towards sustainable energy management. Initiatives like 'Waterwise Programs' encourage collaborative efforts in promoting sustainable water consumption.

- Travel accessibility has been an area of focus, especially in Margaret River; however, there is scope for improving the experience of visitors with disabilities in the region via initiatives concerning information and awareness, implementation of practice, and accessibility in spaces.

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