

Monkey Mia Business Plan

● 2011 - 2015

Department of Environment and Conservation

Public Sector Disclaimer

The findings and opinions in this report are based on research undertaken by the Merivale Trust Trading as Savagely Creative and iNTA Communications as independent consultants, and do not purport to be those of the Department of Environment and Conservation.

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Introduction

Monkey Mia is one of Western Australia's icon tourism experiences and has been since the sealing of the road from Denham, to monkey Mia in 1989. Attracting around 100,000 visitors a year, the site's main draw is the local population of Bottlenose Dolphins (*Tursiops truncatus*). The dolphins have been coming into the shallows since the 1960's to take fish from humans, an interaction that began with the local fishers and is now managed by the Department of Environment and Conservation (DEC).

DEC rangers provide a daily interpretive experience with up to three feeding sessions with commentary about the dolphins, the research and the World Heritage Area. Despite significant visitor numbers this experience remains relatively low key with visitors lining up on the beach and jetty to hear about the dolphins and to watch a small number of them being hand fed.

The experience has been in its current form since the late 1980's with first Shire and then DEC rangers managing the feeding of the dolphins. Proposed changes to the Monkey Mia Resort and the potential to double visitor numbers presents an urgent need to review the commercial operations at the site and to prepare a business plan that will allow DEC to respond to the future needs of the dolphins and visitors.

This business plan has been commissioned by the Department of Environment and Conservation (DEC) to guide their commercial operations at the Monkey Mia Conservation Park. The plan has been developed in consultation with DEC regional and central management teams, staff at the Monkey Mia site and selected stakeholders.

This business plan analyses the commercial operation at Monkey Mia and offers a range of options to increase efficiency and improve the financial outcomes. These options take into account the importance of ensuring dolphin welfare and the delivery of quality visitor experiences and interpretation.

Scope of Works

DEC provided a consultancy brief that outlines specific areas that it would like addressed as part of this project:

1. A comparison of entry fees to similar attractions at intrastate, interstate and selected international locations. A similar comparison of commission fees, services and functions. A similar comparison of wholesale to retail mark-up rates. Recommendations for future fee schedules, commission rates and retail mark-up percentages. Recommendations on alternative entry fee collection options e.g. Via the Monkey Mia Dolphin Resort, self registration
2. Business plan covering all aspects of the operations, showing estimated revenue and expenses for five years. Components of the plan should include (but not be limited to):
 - (a) Recommendations for improving income generated from the souvenir shop/booking office,
 - (b) Comparison between leasing the shop and other functions to a private operator or DEC continuing to operate;
 - (c) Analysis of the functions of all staff (including volunteers) to gain the best return on the commercial business and non commercial management functions of the centre;

- (d) Analysis of the time required of all staff (including volunteers) to undertake the functions to gain the best return on the commercial business and non-commercial management functions of the centre. This analysis should examine the industrial agreements under which staff are engaged;
- (e) A recommended staff structure;
- (f) SWOT analysis;
- (g) Assessment of the current use of the conservation park grounds, buildings and facilities (e.g. office, booking office/souvenir shop, amphitheatre, interpretation hall, theatre, fish room, lawn areas, playgrounds, car parks). The assessment will include recommendations for potential future use of those management areas including the potential for research facilities and individual commercial operators facilities being accommodated onsite and will also include recommendations to improve visitor facilities (e.g. proposed redevelopment of jetty in relation to dolphin viewing area);
- (h) Review of the Service Agreement between DEC and the Monkey Mia Dolphin Resort including compliance with the agreement, review of the appropriateness of costs charged by the Monkey Mia Dolphin Resort for services including sewerage and electricity and other options for providing these services;
- (i) Review of financial management arrangements and compliance with DEC policy;
- (j) Review of pricing of goods and services provided at the souvenir shop and an assessment of pricing with regard to full cost recovery. This could include incentives/rewards to staff linked to shop turnover. DEC is currently reviewing its Merchandising Policy and Consultants should acquaint themselves with the requirements.

Background

Between 1988 and 1995 the Shire of Shark Bay managed the dolphin interaction on the Monkey Mia Reserve. By 1993 the Shire employed six full time rangers. In July 1995, following negotiations between the Shire and the Department of Conservation and Land Management (CALM), the management of the dolphin interaction was passed to CALM. At that time CALM took over a low key tourism operation with some significant dolphin welfare issues and a lack of emphasis on the scientific basis for the management of the dolphins. *numbers?*

In 1996 a Deed of Agreement was established between CALM and the Shire, which provided a framework for the management of Monkey Mia Reserve. This deed presented considerable challenges to the CALM operation including the fact that the reserve could not be managed under the CALM Act. In 1996 the Shire requested that CALM develop plans for a new visitor centre, which was opening in 2001 and cost around \$1 million, with about 50% of the funding being provided through an external grant. At the same time DEC reconstructed the car park at a cost of \$250,000. The running costs associated with the new visitor centre lead to an increase in overall expenditure, which by 2003 was estimated to be 10 - 15%. *not a 'deed' issue*
see comment

see

Business Goals and Objectives

The goals and objectives for this plan have been developed in consultation with the Department of Environment and Conservation (DEC).

Goal

To support and contribute to the conservation of the dolphins and other natural values of the areas managed by the Shark Bay District through the provision of a world-class interpretive and educational visitor experience.

Objective

To ensure that the Monkey Mia visitor centre provides a cost effective world-class interpretive and educational experience to visitors based on the dolphins and the values of the Shark Bay World Heritage Area.

The dolphin experience at Monkey Mia is one of the major economic drivers for this region. Having said that there continues to exist some rivalry between Denham, the closest town, and Monkey Mia.

A report from the Journal of Tourism Studies¹ estimated that the dolphin experience was "responsible" for between 5% and 11% of total income for the Gascoyne region. This accounted for approximately between \$4.2m and \$8.8m. The Shark Bay region is a small subset of this region and as such is likely to be even more reliant on the dolphin experience for their economic wellbeing.

Business Environment

The Monkey Mia business environment is unique in a number of respects. From 1988 until 2007 the commercial operations were undertaken on the Monkey Mia Reserve which was jointly vested in the Shire and DEC (then CALM). Until 1995 the Shire provided Rangers to manage the dolphin interaction as at 1993 there were six full time rangers employed. In 1995 DEC took over the management of the dolphin interaction and commercial operation.

A Deed of Agreement was drawn up between DEC and the Shire which required DEC to make regular payments to the Shire as compensation for lost income from the dolphin experience.

In addition DEC entered into a service agreement with the Resort for the provision of power, water and sewerage disposal, from the shared toilet facilities. These agreements exposed DEC to a wide range of constraints including a restriction on the kinds of merchandise that could be sold in the shop. These constraints had a real affect on the financial viability of the operation. During much of the time between 1995 and 2007 the relationship between DEC and the Shire and the Resort have been strained which has created a very difficult situation for staff on the ground at the site.

The gazettal of the Conservation Park in 2007 includes all of the area where DEC activities take place and has provided DEC with a greater degree of independence. Although the Shire was vehemently opposed to the creation of the conservation Park, changes in personnel at the Shire have lead to improvements in this relationship. The continued validity of the Deed of Agreement is being reviewed by the State Solicitor's Office, this is in light of the significant changes in the vesting of the site and the creation of a number of new lots and reserves that afford the Shire a range of commercial possibilities.

¹ Regional Economic Dependence on Iconic Wildlife Tourism: Case Studies of Monkey Mia and Hervey Bay – N Stoekli, A. Smith, D. Newsome & D. Lee in The Journal of Tourism Studies Vol.16, No.1, May 2005

Operations

The relationship with the Resort is also relatively stable although a recent sewerage spill has caused some strain on the relationship. Aspen Parks, the Resort owners, have submitted proposals to take over the commercial site and manage it as a tourism attraction. They are proposing significant investment in infrastructure and a greater focus on research and interpretation. Part of the proposal is the development of significant research facilities that will provide space for the many researchers to undertake their work and at the same time provide an interpretive experience to the visitors. This proposal has been considered but rejected at this stage due to a perceived lack of robust business planning.

Legal Issues

The Monkey Mia Conservation Park is managed under the CALM Act and CALM Regulations. This allows DEC staff to collect fees, manage tour operators and manage visitors.

Sout.

DEC has a service agreement with the resort for the provision of power, water and sewerage. This agreement provides a fee for service of around \$40,000 per annum. The reliance on the resort for these essential services can create some tension and in the past threats have been made to cut power when DEC was seen to be doing anything the resort did not agree with, such as selling T-shirts. Whilst this behaviour is against the Trade Practices Act it does not preclude the resort from making threats. *(caravan sites)*

Business Location

Location

is

Monkey Mia is located on the eastern shore of the Peron Peninsula 856km (9 hours drive) north of Perth. The site is 25km from Denham, the nearest town and sits within the Shark Bay World Heritage Area (WHA). The site being examined is the Monkey Mia Conservation Park, which was gazetted in 2007. Prior to this date it was part of Monkey Mia Reserve (1686), a 456 hectare reserve that was jointly vested with the Shire of Shark Bay and the Chief Executive of the Department of Conservation and Land Management (CALM). It also adjoins the Shark Bay Marine Park.

History

The Monkey Mia Reserve was gazetted in the 1890's for "Government Requirements" following a request from a Pearler to depasture sheep.² After this it was used as a base for the pearling and fishing industries. In 1890 Monkey Mia was reported to have a population of 135.³ Monkey Mia became a popular fishing and camping spot and the dolphins have been coming into the shallows since the 1960's. In 1975 a caravan park was established and the area continued to grow in popularity as a tourism destination. Visitor numbers remained relatively low due to the unsealed access road. A visitor centre was constructed in 1985 to provide information to visitors.

A special State Government grant was provided in 1988 to develop roads, car parks toilets and landscaping. In October 1988 the Monkey Mia Reserve (1686 Lots) was jointly vested with the Shire of Shark Bay and the Executive Director of the Department of Conservation and Land Management for the purpose of recreation. The adjacent caravan park reserve was vested with the Shire of Shark Bay. In 1989 the road between Denham and Monkey Mia was sealed, this had an immediate effect on visitor numbers. In 1985-86 it is estimated

² Monkey Mia Reserve Draft Management Plan (1993) Department of Conservation and Land Management

³ West Australian 27.12.1890 reported in Monkey Mia Reserve Draft Management Plan (1993) Department of Conservation and Land Management

that around 38,000 visitors went to Monkey Mia, in 1989 that number was 114,000 and in 1990 it was 102,000.⁴

A Deed was drawn up between the Shire and CALM and a Management Committee was established with an independent chair, filled by the Gascoyne Development Commission. The relationship with the Shire was difficult and generally antagonistic, as was the relationship with the Resort and also the Denham business community. These poor relationships led to a very difficult time for all CALM staff at Monkey Mia and in Denham.

The joint management arrangements were a major constraint to the management of the site and in 1997 Cabinet agreed to a number of changes including the excision of an area from within the joint reserve to be vested in the Conservation Commission. The Shire vehemently opposed this move and it took until 2007 for the reserve to be gazetted as a Conservation Park.

Resort expansion. Not 1997.

Business Premises

The Conservation Park abuts the Shark Bay Marine Park and is located within Shark Bay World Heritage Area. It is adjacent to Reserve 40727, Lot 67 a 3.75 hectare C Class reserve managed by the Shire for the purpose of "Caravan Park, Chalets and Camping." This is now the Monkey Mia Resort owned by Aspen Parks, a major player in the Western Australian tourism sector which also owns accommodation sites in a number of the iconic tourism locations across the state.

The DEC operation consists of Dolphin Interaction Area (DIA), which is out of bounds for boating, swimming, and interaction with the dolphins outside the set feed times. Also within the complex is a visitor centre, which houses an interpretive display, shop, theatre, and fish preparation room. This building was architecturally designed and opened in 2001. Unfortunately the building has proved to be relatively difficult to maintain due to roof and window heights and a range of design features meant to create cross ventilation but which lead to sand ingress and the need to modify the building. The interpretation is now in need of a refresh and review taking into consideration new ways of engaging the public.

In addition to the visitor centre there is a significant amount of parking at the back of the centre. Fees are collected at the gate via tollbooth, which is manned for most of the day. Fees are payable by all visitors to the site including Resort guests, this has led to some conflicts with visitors who feel aggrieved that they have to pay additional fees on top of their accommodation costs.

DEC also has an office at the site, which houses the staff that works on the site. This building was the old visitor centre and provides office accommodation, storage and staff areas. There is also a toilet block for day visitors, which is also used by resort guests.

The resort currently sleeps around 600 guests. Aspen Parks has approval to extend the resort onto a piece of land adjacent to the current resort. This expansion could potentially double the number of guests accommodated at the resort and could have a significant impact on the quality of the experience provided at Monkey Mia.

visitors at the day to interaction papers which could

Risk Management

There are a number of risk issues that need to be taken into consideration with regard to the Monkey Mia site. A few of the most important ones have been listed below:

- The Dolphins ?

⁴ Monkey Mia Reserve Draft Management Plan (1993) Department of Conservation and Land Management

A large component of the

The ~~whole~~ Monkey Mia experience revolves around the continued appearance of the five dolphins that are being regularly fed. Should the dolphins decide not to come in for a prolonged period of time or should they die for some reason there would be no experience and the impact would be catastrophic.

Send intercom

The continued sustainable management of the experience is imperative to the ongoing health of the dolphins and the continuation of the experience.

to their families

● **Water Pollution**

There is a high likelihood that the water in front of the resort or adjacent to the jetty could become contaminated. In early 2010 there was a significant sewerage spill into the water in front of the resort. Whilst this was dealt with relatively quickly it highlights the potential dangers and the need for strong safeguards against future spills. This will require a joint approach from the Resort and DEC.

potential hydrocarbon

A number of commercial tour operators, pearling & fishing operators launch and dock boats from the boat ramp, finger jetty and main commercial jetty. There is a significant amount of activity here and a high likelihood of fuel spills. The contamination of the water could lead to the injury or death of the dolphins with catastrophic consequences.

or them avoiding the area

It should be noted that both the commercial operators and the Resort have a vested interest in the continued health and well being of the dolphins, without them their businesses would struggle to remain viable. Having said that some of the other boat users have less at stake.

be

● **Decline in the Quality of Experience**

attraction session

There are times when the experience on the beach is severely impacted by the number of visitors. During the busy school holiday there can be up to 600 people on the beach for the first feed, in this case the quality of the experience is severely diminished. The expansion of the resort could have a significant impact on the experience and will lead to the need for stricter management of the experience, potentially by issuing tickets for specific feeds. It is inevitable that as numbers grow the experience will change. Failure to plan for this change could lead to catastrophic consequences as people would no longer make the effort to travel all the way to Monkey Mia as other experiences can be found closer to Perth.

Not the only option

● **Competition**

dolphin interaction

S. Bunbury & Mandurah

The Monkey Mia dolphin experience has been going since the 1970's and continues to draw significant numbers of visitors. Its original attraction was the wildness of the experience and its uniqueness. Over the years other experiences have been developed in locations closer to the main population centre of Perth. The Bunbury, Rockingham and Mandurah experiences all provide a personal experience with dolphins without the need for a long journey. Whilst these are not feeding experiences both Bunbury and Rockingham provide in water, swim experience that is not offered at Monkey Mia. The increased cost of travel including fuel, accommodation and food and beverage costs could act as a deterrent to travelling to Monkey Mia.

Monkey Mia is a more natural site

The Market

is better

Monkey Mia sites within the Australia's Coral Coast Regional Tourism Organisation area. This region includes a significant proportion of the West coast and is roughly broken into five key regions: Ningaloo Reef, Shark Bay, Kalbarri, Geraldton and Cervantes/Jurien Bay. These regions contain many of Western Australia's iconic experiences including the Pinnacles, the Mid West Wildflowers, Kalbarri National Park, Monkey Mia, Coral Bay, Exmouth and the Ningaloo Reef.

The region is a popular destination for intrastate travel and includes some of Western Australia's most popular family holiday destinations. Monkey Mia is viewed as being a

Why visit one than

mature destination within this region and the Tourism Destination Priority⁵ report suggested that it was now in need of rejuvenation. Having said that there were no priority actions linked to the rejuvenation of the Monkey Mia dolphin experience.

The tourism figures published for the Shire of Shark Bay⁶ suggest that the Shire attracts around 98,500 visitors with 60,000 of those being domestic and 38,500 being international. If that it the case it would follow that 100% of international visitors are there to visit Monkey Mia. Figures at this level need to be treated with some caution due to very small sample sizes used.

The average length of stay is 4.6 nights for domestic visitors and 2.4 nights for international visitors. In terms of purpose of travel; 81% of domestic visitors and 99% of international visitors travelling for holiday or leisure purposes. For international visitors accommodation types are fairly evenly split between caravan (38%), Hotel, resort, motel, motor inn (30%) and backpacker/hostel (29%). A high proportion of domestic visitors are male (56%) whilst international visitors are 47% male and 53% female. A large proportion of domestic visitors are aged between 25 -44 (38%) and 45-64 (32%). For international visitors 44% are 25-44 and 27% are 45-64. The majority of international visitors are either travelling alone (46%) or in a couple (38%).⁷

The market for Monkey Mia is mixed with a broad cross section of the Western Australian visitor groups. Data on visitor characteristics is limited but from the figures available it seems that almost 50% of visitors are international followed by Western Australians and interstate visitors.

Until 1988 visitor numbers were relatively low but the sealing of the road led to a significant increase and the need for additional facilities and infrastructure to be put in place to cater for their needs.

There was some suggestion in the 2005 study of Monkey Mia⁸ that the experience at Monkey Mia was declining in popularity. However figures for 2007 – 2009 are all over 100,000 with 2008 having the highest visitation on record. This may be linked to the global economic crisis, which seemed to result in many people remaining at home for their holidays that year. The figures for intrastate visitors in 2008 and 2009 seem to support the growth in holidaying at home despite the growth in international travel by Western Australians. Conditions in the European generating markets have continued to deteriorate since then and the figures for 2010/11 will provide an indication of how this has affected the site. Numbers however seem to have remained relatively steady. **Appendix Two** shows a breakdown of visitor numbers from 1987 and a graph showing combined visitation to the site.

It has been suggested that a large number of visitors to Monkey Mia are first time visitors and that there is a relatively low number of repeat visitors.

The Experience

Current Situation

The Experience being offered is unique and authentic. The central experience is the daily hand feeding of the dolphins that live within the Shark Bay area. A small number of dolphins

⁵ Tourism WA (2010) Australia's Coral Coast Tourism Development Priorities 2010-2015

⁶ Tourism WWA (2010) Shire of Shark Bay Overnight Visitor Fact Sheet Years Ending December 2007/08/09

⁷ Tourism WWA (2010) Shire of Shark Bay Overnight Visitor Fact Sheet Years Ending December 2007/08/09

⁸ Regional Economic Dependence on Iconic Wildlife Tourism: Case Studies of Monkey Mia and Hervey Bay – N Stoeckl, A. Smith, D. Newsome & D. Lee in The Journal of Tourism Studies Vol.16, No.1, May 2005

Visitor survey.

a relatively natural experience compared to other dolphin sites in more developed centres

come into the beach and are fed. Dolphins have been coming into the beach since the 1960's and with the sealing of the road from Denham the visitor numbers grew.

Visitors stand on the shoreline and a small number are picked to hand feed the dolphins. The DEC rangers provide a commentary mainly focused on the dolphins, they also spend much of their time managing visitors and maintaining the welfare of the dolphins. There are usually three feeds in the morning between 8.30 and 12.00 depending on how many dolphins come in. The dolphins seem to be very regular and generally visitors do get the opportunity to experience them.

The rangers' commentary is centred mainly on the dolphins with some inclusion of information gathered from the significant number of researchers operating in the area. Little or nothing is included relating to the World Heritage Area or promoting other activities in the area, although tours are sold through the visitor centre. Once the morning feed is over rangers have a range of duties including the gate, shop and other duties linked to water quality and other data collection. No other face-to-face interpretation opportunities are usually provided although some school holiday activities are offered.

The visitor centre has an interpretation display offering information about the dolphins, the Aboriginal people in the region, the World Heritage Area and provides a range of props. When the interpretation centre was initially developed there were a number of interactive multi media exhibits, these have since been removed as they were found to be unreliable. The interpretation is now over ten years old and very static and in need of some refreshment. Some of the exhibits have become quite tatty and generally speaking visitors are not drawn to experience it.

In the same building as interpretation centre there is a theatrette which is used daily to show a range of DVDs. When the centre was developed initially the projection system required a darkened room. This equipment has since been changed and a standard flat screen television is now being used. This new equipment can be used without the need for blackout curtains, which now presents the possibility of moving the theatrette to a different location within the complex.

Within the complex there is also a small shop selling a range of souvenirs, collectible items and clothing. The shop is positioned at the back of the building away from the beach and anecdotal evidence suggests that many visitors do not notice it on their way into the complex. It is a recommendation of this report that DEC considers moving the shop to a location closer to the beach. Moving the shop to the theatrette location will provide the ability to open up the doors between the interpretation centre and the shop and potentially increase traffic to both and thereby increase revenue.

Moving the theatrette to the current shop location will provide a range of opportunities to offer additional interpretive experiences including ranger and researcher talks. The television can be used to project PowerPoint slides so no additional equipment would have to be purchased to offer this additional attraction.

Experience Assessment

A detailed assessment of the experience at Monkey Mia has been undertaken. This assessment has used the **Tourism Experience Assessment Matrix (TEAM)**, which looks at eight variables that make up an experience: Invitation, Welcome, Orientation, Comfort, Communication, Sensation, Evaluation and the Finale. These variables are explained below and a broad summary is provided. The full matrix can be found at **Appendix Three**.

Invitation

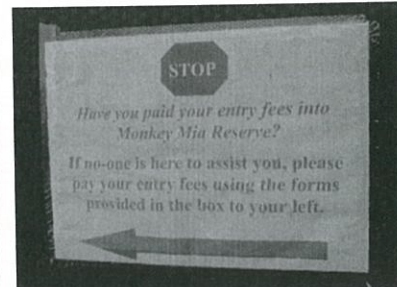
The invitation phase begins when someone decides to visit a location and ends at the car park of the attraction. This includes promotional information, web sites, and the word of mouth promotion relating to the site. This also includes the brand reputation of the site.

Monkey Mia has a strong reputation in the international market and Tourism WA and Tourism Australia have undertaken significant promotion. One of the key points to make with regard to the invitation for this site is that DEC, as the product owner undertakes no promotion of this site. Their website is very corporate and focused on information about the site as a Conservation Park rather than promotional activity. Most of the promotion of the site is undertaken by third party organisations including tour operators, Aspen Parks and Australia's Coral Coast. *Regional Beach Association?*

The signage leading up to the site needs to be reviewed. There appears to be only one sign promoting the need to pay an entry fee and this is about 20km away near Denham. The result of this is that many people miss the sign and person on the gate are often faced with disgruntled visitors. This situation is made worse by the fact that the Resort promotes the dolphin experience as a free attraction, which leads to its visitors being particularly unhappy about having to pay. *gate vs toll box*

The circulation at the gate is also difficult with early morning traffic queues as people try to get into the site in time for the first dolphin feed. The gate is ~~not~~ manned first thing in the morning and this means that guests have to complete a self-registration form, which seemed to cause some confusion for visitors and frustration for those that had little or no intention of paying. Manning the gate earlier may alleviate some of the congestion early in the morning. *from 6730*

Welcome



Images: Visitors completing registration, instructions for entry fee, Notice to pay

© 2010 Savagely Creative

Depending on when a visitor arrives the welcome will vary. If they arrive in time for the first feed they are likely to be greeted with a queue, a makeshift sign informing them that they have to pay and a large number of people hurrying to get to the beach.

Later in the day there is often someone on the gate who will greet the visitor and inform them about the park entry fee. International visitors seem to be comfortable with this fee however, Australian visitors and those staying at the resort are less happy to pay. This could lead to the first experience of a DEC staff member being quite negative, through no fault of the staff member.

Once guests have found their car park and made their way through the visitor centre to the beach they are then greeted by staff trying to keep them off the beach. This was the case during the consultants' visit but I understand that this was due to the birth of a new calf and the need to strictly manage the interaction. There is little or no engagement with the visitor until the feeding begins and even then much of the ranger's time is spent trying to control what can sometimes be a very large crowd.

A better format would be to gather visitors in the amphitheatre before the first feed so that the interpretation experience can begin there. This would give the rangers the opportunity to explain what the visitors should expect, clarify the rules relating to conduct at the feed and to *Reds comments*

New signage e M.Mia re no camping in the way style.

start the interpretation experience. Waiting until visitors are on the beach and often in the water means that much of the beginning of the talk focuses on getting people out of the water, a poor experience for both the staff and the visitor. Managing the experience in this way may also assist in reducing large numbers at the first feed during the peak season. Staff spoke of up to 600 people being on the beach occasionally and regularly over 300 visitors. The result of these huge numbers is a poor experience for the people, the ranger and the dolphins. The expansion of the Resort could mean that these large numbers of visitors could become a more regular feature at the site.

Orientation



Images: Entry Signage, walkway entrance, interpretation centre
© 2010 Savagely Creative

There are some signs on the road leading into the site and some signage leading visitors through the site although there was some concern from staff that the layout of the car park was not optimal. Whilst there is no information on where visitors should go for the dolphin experience it was fairly obvious where to go, as the sea is clearly visible from the car park. Signage at the interpretation centre seems to have faded over the years and is in need of refreshing. Whilst some visitors did find their way to the interpretation centre and shop, many left the site via the resort so never had the chance to engage with the interpretation or purchase merchandise at the shop.

In most cases a visitor attraction has what can be called a decompression zone. This is the area between the car park and the point where the visitor starts to slow down and take notice of their surroundings. Whilst visitors are in the decompression zone they see nothing. At Monkey Mia pretty much the whole of the boardwalk from the car park to the beach is the decompression zone. The signs at the car park end are invisible to the visitor as is the shop, they only start to register things as they move past the theatrette. With this in mind it is recommended that all orientation signage be placed at the beach end of the boardwalk and should provide a map of the site and an introduction to the dolphin experience. This will also provide an introduction to the experience.

Comfort



Images: Beach experience, Jetty Overflow, Dolphin Feed
© 2010 Savagely Creative

As they stay in the water until the feed

people e park feed

Addressing of feed crowd size.

as already be easy station to drive to boat ramp car park

How do we redirect visitors via the shop?

Yes. Orientation near car park with "STOP"!!

One of the main attractions of this experience is the fact that it is still relatively unmanaged, unlike Tangalooma or Penguin Parade. This is possible because the visitor numbers are still relatively small. Visitors line up along the shore and wait for the dolphins to come in, a small number of visitors are then invited to come forward and feed the dolphins.

Many people like the relative freedom and close proximity to the dolphins this does present an issue for many of the visitors. Especially during the morning feed the crowd is often so big that anyone other than those in the front row cannot see the dolphins and the line curves at the ends as people try to see around each other. This leads to the rangers instructing people to get out of the water, something that can affect the enjoyment of the visitors, no one likes to be told off.

Many visitors resort to moving up onto the jetty for a better view and in some cases quite large numbers of visitors can be found there. The jetty is for commercial use and large numbers of visitors on the jetty can hamper boat operators in their preparations for the morning cruise, this can lead to conflict and again can impact on visitor enjoyment.

There is also little or no shade at the site, which leads to people being exposed to full sun for a number of hours in some cases. With many of the visitors coming from overseas this is a dangerous scenario since many of them are unused to the intensity of the Australian sun and can become very badly sunburned. There is also very little seating available at the site and whilst those who are mobility impaired can go onto the jetty it is almost impossible for them to have a beach experience.



Images: Pre Briefing Gathering, Between Feeds, beach shelter
© 2010 Savagely Creative

It is recommended that visitors be briefed in the amphitheatre before they go to the beach. This will reduce the amount of time they will need to spend on the beach and will also allow rangers to explain the rules relating to entering the water and reduce the need to chastise visitors on the beach. The shelters are old and do not provide sufficient shelter for the large numbers of people who wait between feeds, new shelters should be developed. The purchase of a small number of beach wheelchairs should be investigated to provide a better experience for mobility impaired visitors.

Communication

Communication looks at a range of things including the key messages being communicated, written and verbal communication, signs, languages and even the tone of voice used to communicate.

The main experience at Monkey Mia is interpretation, without it there would be no experience. Rangers give a commentary on the dolphin interaction and there is also a static display with panels, props and some audiovisual.

Having said that there was no clear message included in the interpretation and rangers were unaware of the theme of the interpretation. Most of the rangers had not received any training in interpretive techniques and many had learned what they know from people who had been presenting for some time.

While

P.S.

move to shallower water

any creek or pond

✓ shade is needed

Reds comment / package / I.D of those who have paid + attend

We have one rarely read 'do

Post language

Discrepancy for could still be a dolphin

Most of the rangers saw the dolphins as being the only thing to discuss and felt that the World Heritage Area status of the region was not relevant and did not include it in their presentations. Beyond the morning interaction there was little offered to visitors to engage them in the site, research, and other experiences at Monkey Mia and in the broader region. A great opportunity exists to enhance the visitor experience and encourage visitors to explore other sites & attractions around the region by creating other interpretive experiences such as guided walks, ranger talks about other topics and involvement of the numerous researchers that study the area.

Ranger training is important and the ~~proposed~~ structure would ensure that rangers with a responsibility for interpretation would be freed up to provide other activities. These could be provided for free or at a fee.

Written communication varies around the site. There were a number of ~~hand written~~ signs mainly linked to regulation and there was a need for more warning for visitors about the applicable fees at the site. Rangers also have to deal with irate visitors who have been led to believe that the experience is free and are then confronted with the reality of the entry fee. Training in customer service and dealing with conflict is important for staff confidence as well as ensuring the best customer experience possible.

Sensation *(Asada)*

For an experience to be truly memorable it must stimulate each of the five senses. Most of the senses are engaged in some way but there is considerable scope for enhancement in some areas.

Evaluation

Some evaluation of the experience has been undertaken through a range of visitor studies. Rangers also have the opportunity to speak to visitors at a number of times throughout their visit to Monkey Mia. With the expansion of the resort there is likely to be a continued impact on the quality of the experience due to increasing visitor numbers and overcrowding on the beach. Some thought needs to be given to how DEC will continue to monitor the experience and make changes to improve it.

The current trend in visitor attractions is the development of a two way dialogue with the visitor and creating an ongoing relationship. This increases the ability to create advocates who will continue to support the experience. The Resort has a Facebook site and uses Trip Advisor; DEC however does not have the ability to create a relationship with the visitor once they have left the area. A review of the website and the ability to create some kind of two way dialogue would assist in receiving feedback about the experience and reviewing customer satisfaction in between formal visitor satisfaction survey exercises.

Finale

The finale refers to the things that visitors take away from the site with them, the memories, images, connections and ~~of course~~ souvenirs. DEC has a number of excellent retail outlets at other sites, particularly the Valley of the Giants and the Pinnacles, both of which receive significant visitor numbers.

The provision of merchandise that can remind the visitor of their experience and is likely to be kept is important. Having high quality merchandise, that reflects the site and gives visitors a deeper understanding of the place is important for promoting messages as well. Little Light and Local souvenirs can be used to tell the story of local artists and manufacturers and create a stronger connection to the place. Small souvenirs are also easier for international visitors especially to transport. It is also important to have a point of difference from other commercial operations, particularly the resort to ensure there is limited direct competition. An example is an on-line merchandising facility for pre or later purchasing with post shipping partnerships

SWOT Analysis

Through site visits and consultation with the project management team an analysis of the Strengths, Weaknesses, Opportunities and Threats as they relate to the Monkey Mia operation. These have been broken into topic areas for ease of analysis. A summary of the SWOT Analysis is provided below with the full detail being available at **Appendix Four**.

Strengths

Overall the Monkey Mia visitor centre strengths are its staff and volunteers who are very passionate about the work they do. The location of the visitor centre and the infrastructure is very good. Monkey Mia is very well known locally, nationally and internationally as an ideal place to go to see dolphins in the wild.

Weaknesses

There were a number of weaknesses that were identified however one of the main issues was identified during the discussions with visitor centre staff. It became very apparent that there were a number of issues relating to roles, rosters and wages and also the need for training. There are a number of job functions that they are expected to undertake but they have not received any training for these roles they are required to undertake. Although the infrastructure is very good there are number of areas that are under utilized, for example there could be better use of the Amphitheatre, the theatrette, shop location is not in the most visible location and the signage could be improved. It was observed that the current interpretation could benefit from being refreshed, as it is not current and appealing to visitors. The dolphin experience and or interaction is at risk of diminishing due to overcrowding.

Opportunities

There were a number of opportunities identified by the project team and they are identified in this report. To enable the Monkey Mia visitor centre to be self-sufficient and remain a premier destination it is imperative that the weaknesses are alleviated and the threats minimised. To do that, staff should be fit for their role and training provided for those who need it in interpretation, retail management, customer service, and crowd control. Greater efficiency in the management of the shop can be achieved, through better stock analysis and improved buying policies being implemented. A review should be undertaken of the volunteer program, as well as improvement in the interpretation and education activities and programs. A review and refreshment of the interpretation centre should also be conducted.

Threats

There are a number of threats to the Monkey Mia visitor centre operations and they are identified in the SWOT and throughout the report. The main threats are related to the staff issues, lack of training, a poor visitor experience and interpretation together with poor shop merchandise management and layout. There is a real threat of overcrowding which could lead to a bad experience and in turn could lead to a lack of interest to visit the area, which leads to a decline in visitor numbers.

Situation Analysis

The following is a summary of the situation analysis. More detail can be found at **Appendix Five**.

Political

There are a number of issues that could potentially affect the operation of the Monkey Mia site, some local some more State focused. The relationship with the Shire has improved considerably in recent times with the recruitment of a new Shire Chief Executive and ~~President~~. This improved relationship should be capitalized on and recently the Shark Bay World Heritage Discovery Centre began selling advance tickets for Monkey Mia. The relationship with Aspen parks is less stable following a sewerage spill early in 2010; both Aspen Parks and DEC have issues arising from this incident. Aspen Parks has also submitted a number of proposals since 2009 to take over the running of the interpretation side of the Monkey Mia operation. Their proposal includes a major research centre, new interpretation centre focusing on the outcomes of the research and incorporating a greater Aboriginal focus, retail functions and the employment of one full time DEC ranger to manage the dolphin feeds.

Economic

The last few years have been characterized by a significant amount of economic uncertainty. Whilst Western Australia is still doing well, many of its tourism generating markets have been struggling including the Eastern States and Europe. The strength of the Australian dollar is also having an impact on domestic tourism numbers with a significant increase in Western Australians travelling overseas.

Social

The growth in the baby boomer market has the potential to significantly increase the demand for the visitor experience at Monkey Mia. 2011 sees the first large wave of baby boomers retiring and there is still a high propensity to travel within this group. Having said that the growth in international travel by Australians may have a negative effect on the growth of this market.

Technological

Technology continues to develop very rapidly with the growth in smart phone and mobile computer technology. This region is still relatively rudimentary in its supply of this kind of technology with computer lines into the site being limited. The use of the Internet for connecting with visitors and increasing revenue from merchandise should be explored given the limitations at the site.

Operations

Staffing

The current staffing

DEC currently employs eight FTEs, comprising a Level 4 Manager and three Level 1/2 Reserves Officers, three permanent part-time, one casual and two 3 monthly-contracted part time wages employees.

Staffing is a major issue at this site and has been an impediment to efficient operations at the site for a number of years. A key issue is the relatively junior levels of staff employed at

the site. This has meant that there is limited opportunity for career progression at the site and a predominance of Graduate Recruits who tend to move around a lot and do not necessarily have good tourism or customer service skills.

Flat structure

In fact, many of the staff have not been employed for their commitment to conservation not their customer service skills. The result of this focus is often an officious and unfriendly approach to visitors many of whom do not understand English. Whilst conservation and management of the dolphins is of paramount importance, without the visitors there would be no need to have so many people employed at this site.

Since 2006 the most senior position (L4 operations Officer) have been occupied by numerous people many of whom have been L1 or 2 Officers. The position cannot be permanently filled until the substantive occupant (David Charles) gains another position.

There is also a degree of unrest amongst staff at the site due to a gradual blurring of roles and responsibilities amongst officers employed under different terms and conditions. All officers now undertake more or less the same work incorporating responsibilities for the shop, gate, beach and data collection although one group is paid \$6 per hour more, this has become a bone of contention for the staff on a lower wage rate.

Staff work on split shifts to allow the maximum coverage of the various duties at the site and to cover the peak times. Previously staff member were rostered on for an hour of overtime to cover the gate until 5pm. The introduction of split shifts has lead to a significant saving in wages but has also added to the complaints of staff that used to car pool to get to work.

Staff members have not received any training for a number of years and many of them learn how to interpret the dolphin experience from people who have been there a long time. Whilst this is often an effective way to transfer knowledge it also has the unfortunate result of passing on poor habits as well.

Proposed New Structure

A new structure has been proposed to assist with some of the current issues and to assist in focusing staff on their assigned tasks. By creating an overall Business Manager with responsibility the whole operation and creating a definite split between the management of the Visitor Centre and the provision of interpretive services. By creating the division it will be possible to employ and train people that have a focus not only on the protection of the dolphins but also the creation of great visitor experiences.

Terminology

By creating this structure it will be possible to provide a range of interpretive services for visitors that continues to engage them past the short beach feed sessions and will also give rangers more contact with visitors throughout the day.

Positions Summary

The Monkey Mia Business Manager role will be focused on the commercial, administrative and human resource management of the site. The operational environmental, nature conservation and marine park management functions of the staff based at the visitor centre would be overseen by appropriate district program leaders based at the Denham office. This will ensure that the manager's main focus is on the commercial operations of the site and not be diverted on to other district functions such as Marine Park and environmental management.

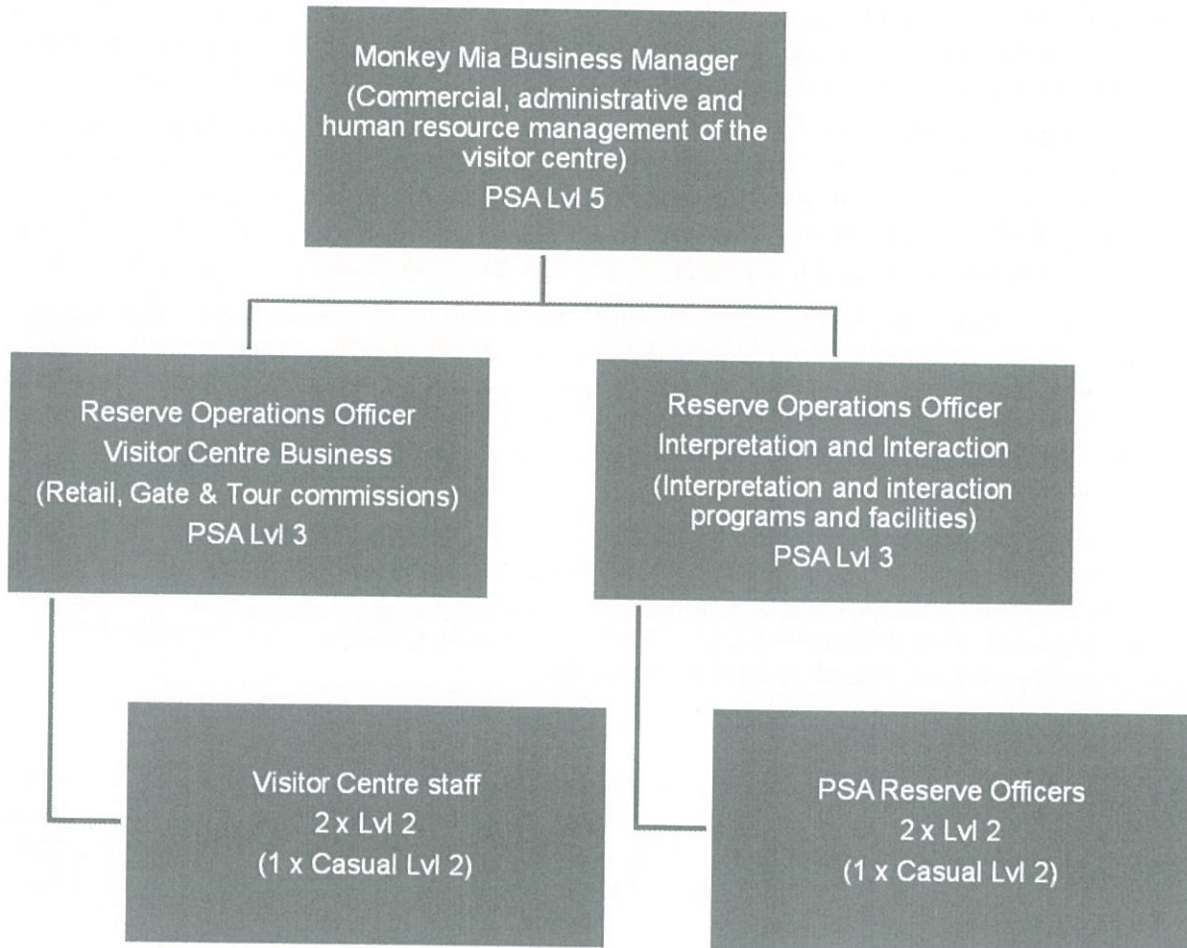
The Reserve Operations Officer – Visitor Centre Business will be responsible for managing the retail, gate and tour commissions side of the business. This role has a strong customer interface and requires an understanding of tourism business systems. The officers under this role will assist this officer in the management of these aspects of the business.

The Reserves Operations Officer – Interpretation and Interaction will have responsibility for the management of the dolphin interactions and the presentation of interpretive experiences to visitors. The officers under this role will have a dedicated interpretation role and will have

education programs

the ability to provide a wider range of interpretive experiences to enhance the experience at the site and to promote the other conservation values of this unique area.

Figure Two: Proposed Organisational Chart



Infrastructure

Toll Gate

The tollgate is positioned at the entry to the site and stops visitors on their way in to collect the park entry fee. In the original design there was a separate entry for those using the boat ramp, this circulation was changed to make all visitors to enter the site the same way, this can lead to traffic congestion during the morning rush for the first dolphin feed. *How to fix*

The tollgate is manned throughout the day although in the slower periods visitors are asked to use the self-registration facilities. *No.*

Interpretation Centre

The **interpretation centre** is made up of an interpretive display, a retail area, an amphitheatre and a theatrette. This centre was opened in 2001 and has not been refreshed since then. Some of the interactive displays have been moved from the interpretation centre and some modifications have been implemented since the opening due to management requirements.

The centre is still difficult to manage with high windows and a high level of exposure to the elements. The displays are now quite old and in need of upgrade. The interpretation whilst

professional is predominantly static with a range of bones and other things that visitors can touch but that have little or no explanation.

The **shop** is situated at the back of the complex towards the car park and many visitors miss it on the way in and leave the site another way. Repositioning the shop could create high revenue per head. With current visitor numbers revenue per head is around \$1 or less. This clearly suggests that the majority of visitors do not find the shop. The shop sells a range of merchandise, provides a tour booking service and acts as an information centre.

There is a **theatrette** at the front of the complex this is used to screen DVD's related to the area and dolphin research. This room is fitted with black out curtains and is relatively unwelcoming from the outside. The previous projection technology required blackout but this has since been removed and a flat screen TV is now being used. This does not need to be in a darkened room so the configuration of this room could be made more attractive.

At the front of the complex is a large **amphitheatre** with seating and shade. This facility initially had a screen but this was destroyed by the elements, this is quite a windy location. This area is seriously under utilised and thought should be given to starting the first beach feed from here to provide visitors with a briefing. This space could also be used for a range of activities including movie night on still nights, research presentations and other interpretive activities.

At the front of the complex facing the beach there is a small building that acts as the **fish preparation room**. This room used to be the main shop but was too small for this purpose. It has windows that open onto the boardwalk and visitors naturally gravitate here to ask questions before and after feed times. This suggests that there is a latent demand for more interaction and conversation about the dolphins.

Dolphin Interaction Area

In front of the main interpretation building is the Dolphin Interaction Area, which is basically the beachfront. There is one sign in the middle of the beach with information about the area although many visitors seem to miss this. Visitors are discouraged from using this part of the beach or entering the water here and staff monitor this area throughout the day from the DEC staff office.

Visitors line up along the water's edge in the morning to watch the interaction. A small amount of fish is fed to each dolphin and there are up to three feeds a day. Only those at the front have a good view of the interaction and when there are larger numbers of visitors the experience is greatly diminished.

Commercial Jetty

The commercial jetty is not part of the DEC management area but it is used by many visitors to get a better view of the dolphin interaction as there is limited visibility from the shore if you are not in the front row. This can lead to conflict with the commercial tour operators who use this jetty to moor their boats and prepare their vessels for their daily tours.

DEC Offices

DEC has staff office facilities next to the interpretation centre. This provides space for staff to undertake any work involving the computer such as ordering stock, inputting dolphin data and other administrative tasks. This building also contains various documents and records and excess stock from the shop. The conditions are cramped and staff members have to share desk space.

Other infrastructure

There is a **trail** at the site that is due to have new interpretive signs installed in the near future. The start of this trail is near the tollgate and will need to be promoted at the visitor

centre to encourage people to use it. This could be a good focus for a guided interpretive activity.

There is extensive car parking at the site for visitors to the dolphin experience. There is some anecdotal evidence that the flow of this car park could be improved although how necessary this is, is unclear.

There is also a finger jetty, boat-launching ramp with associated car parking. Locals predominantly use this area and people who are not interested in the dolphin experience but are there for fishing and other boating activities.

Partnerships

There is significant opportunity for creating partnerships with the Shire, the Resort, the Researchers, Commercial Tour Operators and other tourism businesses and the broader community.

There are very few volunteers from the local community in Denham and over the years there has been quite a lot of antagonism between the local community and the Monkey Mia site. Locals will often encourage their guests to arrive at the site before the Rangers are on duty so that they can avoid paying the park entry fees. There seems to be a general lack of appreciation of how important the dolphin interaction is for attracting people off the main highway and into the area.

The relationship with the Shire has started to improve and a recent breakthrough has been having tickets for Monkey Mia being available through the Shark Bay World Heritage Area Discovery Centre.

The relationship with the resort is currently relatively stable although over the years this has gone through some very rocky patches. DEC is often seen as being in competition with the resort and in the past the situation has been very difficult for DEC staff. There is significant opportunity to create partnerships with the resort through joint ticketing and promotional activities and these options need to be explored further. The recent sewerage spill and the resorts desire to take over the management of the whole site have the potential to cause some unrest in the relationship but if handled well this could lead to a continued amicable situation.

There are two boat operations at Monkey Mia with one being licensed to operate within the Dolphin interaction area and the other having to operate outside it. There is a good opportunity to work with both of these operators and the visitor centre sells tickets to both of the tours although one of the operators has a sales office within the resort.

Financial Analysis

Background

Between 1988 and 1995 fees were collected under the provisions of the Local Government Act and revenue was placed into a trust fund. In 1995 CALM took over the management of the site and since the 1996/97 financial year the Monkey Mia operation has been in deficit. This trust fund covered the deficit until 2000/2001 when the expenditure exceeded revenue by \$67,000.

The increase in costs has resulted from a number of factors including the increased operating costs associated with the new visitor centre, staffing matters, rising fixed costs for services such as power, water and sewerage and a commitment to the Shire to pay an annual \$40,000 in compensation.

In addition for much of the time since the hand over of the site there have been difficult relationships with both the Shire and the Resort, this situation placed a number of constraints on DEC's ability to generate revenue to cover costs. In 1997 Cabinet approved a number of changes that would assist in the development of Monkey Mia including excising a section of the Reserve and creating a Conservation park under the Conservation Commission. The shire was vehemently opposed to this and the relationship soured even further. The Resort and the Shire opposed DEC selling T Shirts and other merchandise which they saw as being in direct competition to the Resort, the situation got so bad at one point that the Resort turned off the power and water to the DEC facilities until they agreed not to sell T Shirts anymore.

In 2007 the Conservation Park was finally gazetted which opened the way to DEC to manage the area with more independently. Until this vesting DEC was unable to increase entry fees in line with inflation and relied on the good relationship with the resort for the provision of power, water and sewerage.

With the change in status of the reserve DEC is currently reviewing validity Deed of Agreement with the Shire to determine if there is an ongoing requirement to pay the compensation payment of \$40,000+ per annum. The Shire has not invoice DEC since November 2005 as there is some dispute about how much DEC owed the Shire. In 2009 some agreement was reached between the Shire and the Shark Bay District Manager on how the amounts owing should be calculated. Negotiations are still ongoing with regard to how much should be paid to the Shire.

Current Position

Revenue

In recent time relationships with the Resort and the Shire have improved significantly and this has allowed for an increase in revenue from entry fees, commissionable sales and merchandise. It will be important to maintain these relationships if revenue is to continue. The future projects examine each of these areas with a view to increasing revenue totals.

Revenue is generated through a range of sources:

- **Gate entry fees** are the largest source of revenue and were increased in September 2009 for the first time since the DEC takeover in 1995. It was estimated that this could increase revenue by \$100,000 in the 2009/10 financial year. In 2009/10 entrance fees accounted for \$529,911 in revenue.
- The Visitor Centre sells tickets to local tour operations, these are sold at a **commission** of 10% in 2009/10 this accounted for \$32,669 in revenue.

- The shop provides a significant boost to revenue and in recent years has been able to broaden the range of **merchandise** on sale. In 2009/10 revenues from this item amounted to \$98,637 made up of sales of books, postcards, posters, videos, film, t-shirts and other merchandise. In 2009 a Reckon Point of Sale system was installed to assist with the management of ordering, sales and stock management. Unfortunately the person who installed the system has left and none of the staff currently employed at the site know how it works. It will be important to train staff in this system to assist with shop management.
- Another significant source of income is E Class licence fees, which amount to \$18,512.
- There is also a small amount of income from rental of Government housing amounting to \$6,750.

Expenditure

Since the building of the new interpretation centre expenditure has grown significantly with additional operational costs related to maintenance, staffing and cost of sales for the shop. The major costs are listed below:

- **Staffing** costs are considerable at \$494,265 for the 2009/10 financial year. This is a 365-day a year operation so there is a considerable requirement for staffing. In recent times some work has been done on creating more effective staff rosters, which has assisted to a certain extent. A new staffing structure has been proposed in this report. **Associated staff costs** including uniforms, travel, air-conditioning etc accounts for \$26,332.
- The **Shire Deed** payments are the next biggest item currently standing at \$88,295. A review is currently being undertaken into the continuing requirement to make this payment. The 2009/10 payment include some back payment and the 2007/08 payment.
- **Office** related costs amount to \$53,786. The office accommodation is relatively basic but there may be some additional benefit to having some of the Shark Bay staff also using this office occasionally. This would be particularly relevant for the Marine park program, which would provide additional support for the Marine Park Ranger based at Monkey Mia.
- **Infrastructure, maintenance and equipment** account for \$54,730. As has already been stated the interpretation centre has increased costs due to the building design and the difficulties associated with the maintenance of the building. There is little that can be done to reduce these costs although a reconfiguration of the building uses could increase merchandise sales revenue.
- The cost of **merchandise** was \$48,025 although the revenue is \$98,637, which suggests that sales are going relatively well although this is an area of revenue that can be built on.
- In 2009/10 there was a one off payment for **professional services** of \$26,180 related to the e-class licence which covered consultancy, dolphin monitoring and boat tracking.
- The other major costs include **vehicles** at \$19,800 and **water sampling** at \$1,607

Future Projections

A spreadsheet detailing the financial analysis and cash flow projections can be found at **Appendix One**. The following notes provide assumptions and explanations.

Overall the financial analysis has shown a trend of smaller deficits over the next four years with the Monkey Mia Visitor Centre becoming self sufficient in 2014/15. For this to be achieved however, the following conditions need to be in place:

- The recommended staff structure being implemented;
- The necessary training must be provided to staff;
- Other operational changes recommended within this report should be put into place,
- The income from the shop must achieve sales targets;
- Visitor numbers must remain steady and not decline.
- Greater efficiency in the shop's operation is achieved with improved management, better stock analysis and possible re-location to a more visible location within the site.

Retail

The shop currently operates a recoup recurrent accounting system, which does not allow for the retention of funds beyond the financial year. It is strongly recommended that the Monkey Mia Visitor Centre shop be operated by way of a trading account to recognise the need for reserves to accommodate stock requirements. This system has been successfully initiated at the Valley of the Giants Tree Top Walk site.

Factored into the forecast is a 5% increase in merchandise sales for the shop which should be achievable with the recommended efficiencies being introduced such as the new Manager with a more commercial focus and better training of the staff in retail management. The introduction of the new central purchasing agreement under the revised merchandising policy will also contribute to the increased sales. A 3% CPI increase in the purchasing costs has been factored into the financial forecast. However, a smaller increase or even a decrease can be achieved by greater purchasing efficiency overseen by the new manager.

Staff Payroll Costs

The increase in payroll costs takes into account the proposed new staff structure agreed to in January 2011 with the Monkey Mia Visitor Centre Business Plan project team. The increase forecast is based on an estimate provided by the district office assuming the new staff structure takes effect from 1 July 2011.

Staff Training

One of the opportunities identified in the SWOT analysis is to increase staff training in interpretation, point of sale systems, retail management, customer service and crowd control. Therefore, new line item for staff training has been included in the forecast with an allocation of \$12,000 for the 2011/12 financial year with a 3% annual CPI adjustment forecast for increased costs of training staff.

Entrance Fees

A small increase in entrance fees has been forecast for 2011/12. The fees will remain the same during 2012/13 and the next fee increase is due in 2013/14 with the Commercial Tour Operator license fee increase taking effect in 2014/15.

Visitor Centre Costs

The expenses in the Monkey Mia Visitor Centre column relates purely to the objectives of the Visitor Centre related to its commercial and interpretive functions.

MM Other refers to estimated expenses relating to other district functions. The costs have been split 75/25 with 75% of the previous costs being allocated to the Monkey Mia visitor centre and 25% being allocated to other functions.

Commissions

The Tour Operators commissions have been adjusted to take into account the trend in the Monkey Mia visitor numbers, based on historic figures provided and the increase in commission rates from 10% to 12% introduced in 2010/11.

Other Costs

A number of other costs have not been factored in such as any updating of the interpretation in the visitor centre or costs associated with moving the shop to the front of the site. In addition if it decided that additional interpretive experiences can be presented by staff, whilst there won't be additional staff costs there could potentially be some increase in costs associated with interpretation such as materials and props. A decision should be made during the development phase as to whether or not to charge for these activities and whether this could have an impact on relationships with other tour operators.

Note: That an increase in the Government Regional Housing cost has not been included in the costs at this stage until clarification as to the amount that will be required has been obtained. The GROH Rental Income has been adjusted for 3% CPI inflation.

Monkey Mia Business Plan 2011 - 2015

Case Studies

The following is a summary of the information gathered through the case studies.

Site	Management	Experience	Charges
Monkey Mia Shark Bay World Heritage Area, WA	Department of Environment & Conservation WA State Government conservation agency	<ul style="list-style-type: none"> ● Daily dolphin interaction with up to five dolphins including a commentary and small number of visitors selected to hand feed the dolphins. ● There is an interpretation centre what was opened in 2001 that has static displays and props relating to the monkey Mia dolphins and other aspects of the area. ● A series of videos is shown daily free of charge in the centre's theatre. ● Monkey Mia is located in a World Heritage Area around 9 hours drive from Perth in a pristine and isolated part of WA. 	Daily and Holiday permits are available although there is no explanation on signage as to what a holiday permit includes. Adult: \$8 \$12 Child: \$6 \$10 Concession: \$3 \$5 Family: \$15 \$30 This Park is not included in the normal Parks Pass available for other parks and reserves.
Bunbury Dolphin Discovery Centre Bunbury, WA	Bunbury Dolphin Discovery Centre Non-profit organisations committed to dolphin research, education, conservation and tourism.	<ul style="list-style-type: none"> ● In water interaction with dolphins. Visitors can stand waist deep in water and the dolphins choose to interact with them. There are no set times or time limits. ● Dolphins are fed within the conditions set by DEC. ● The centre partners with a number of private eco cruise companies that offer swim with dolphins tours in Koombana Bay. ● The centre is located in Koombana Bay in Bunbury about 2.5 hours from Perth, within site of the busy 	The fees for the visitor centre are: Adult: \$10; Child: \$5; Concession: \$5; Family: \$25 The fees for the Eco Cruise (inc Admission to Centre) are: Adult: \$53.00; Child: \$35; Concession: \$45; Family: \$161 Fees for the Swim Encounter which includes a Marine Biologist as a guide are: \$185 Swim and watching – Adult:

Site	Management	Experience	Charges
Tangalooma Dolphin Experience Moreton Island, near Brisbane, QLD	Tangalooma Island Resort Private Company	<p>port of Bunbury.</p> <ul style="list-style-type: none"> Dolphin feeds are in the evening visitors are briefed by a Marine Biologist before accessing the beach. They disinfect their hands and are given a fish. They then wade knee deep into the water where the dolphins swim up to the visitors and take the fish. Guests are not allowed to swim with or touch the dolphins. Only resort guests or guests undertaking an extended tour can participate in this activity. The resort offers a number of activities including boat tours, fish, pelican and kookaburra feeding, research presentations and a Marine Education and Conservation Centre. There is also a specific kids program. 	<p>\$85; Child: 65; Concessions: \$65</p> <p>Guests do not pay any extra to feed the dolphins, this is considered to be part of the accommodation activity. Each guest is allowed to feed the dolphins once on during their stay. Room rates vary between \$310 and \$820 depending on room type.</p>
Seal Bay Kangaroo Island SA	Department of Environment & Natural Resources SA Stage Government Agency	<ul style="list-style-type: none"> Visitors gather at the visitor centre and are led down a path and boardwalk to the beach by a ranger. Visitors cannot approach the seals and must remain with the ranger at all times. There is a commentary from the ranger about the seals and some of the issues facing them. There is some interpretation at the visitor centre. Visitors can also explore the area after their tour via a network of boardwalks under which the seals often rest. Tour operators can be specially trained to take their own tour groups although generally the visitors 	<p>Prices are as follows</p> <p>Guided Tour: Adult: \$27.50; Child: 16.50; Concession: \$22; Family: \$75; School: \$13.75</p> <p>Boardwalk Tour Adult: 12.50; Child: \$8; Concession: \$10.00; Family: 35.00; School: \$6.20</p> <p>There is a Kangaroo Island Parks Pass that allows access to these tours.</p> <p>Sunset Tour: Adult: \$50; Child: \$30; Concession: \$40.00; Family: \$136.00.</p>

Monkey Mia Business Plan 2011 - 2015

Site	Management	Experience	Charges
<p>Mon Repos Conservation Park Queensland Coast Near Bundaberg, Old</p>	<p>Department of Environment & Resource Management QLD State Government Department</p>	<p>want to go with a ranger.</p> <ul style="list-style-type: none"> ● The site is remote and exposed and it is often difficult for visitors to hear the guide. ● Seals are wild and unpredictable. ● A range of experiences are offered: Guided Tours, Boardwalk Self Guided Tour, Sunset Tour ● Visitors arrive at 7pm when the centre opens. Limited numbers of tickets are sold and visitors are encouraged to book. ● Groups are escorted to the beach by rangers to observe turtle activity – nesting, laying or hatching. Visit time can be up to 6 hours. ● Visitors are briefed before they go to the beach. ● This is the largest concentration of nesting marine turtles on the Eastern Australian mainland. ● Visits during the day are free and visitors can access the interpretation centre and the beach during the day. ● The beach is closed to the public between 6pm and 6am. 	<p>This tour must be booked</p> <p>Fees during the breeding season are: Adults: \$9.85; Child: \$5.25; Concession: \$5.25; Family: 23.50</p>
<p>Penguin Parade Phillip Island Vic</p>	<p>Penguin Island Nature Parks Not-for-profit organisation</p>	<ul style="list-style-type: none"> ● Visitors watch the little penguins returning home to their rookery every evening. ● There are a range of experience options from General Admission that gets visitors onto the boardwalk to small ranger led group tours. ● This tour is very popular and attracts large 	<p>General Admission: Adult: \$21.20; Child: \$10.60; Concession: \$14.80; Family: \$53.00</p> <p>Penguin Plus: Adult: \$40; Child: \$20; Family: \$100</p> <p>Sky Box:</p>

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Site	Management	Experience	Charges
		<p>numbers of visitors. It is highly managed.</p>	<p>Adult: \$60; 3 Park pass: \$74.80 Ultimate Tour (10 or less): Adult: \$74.50; 3 Park pass: \$89.30 Eco Tour: Adult: \$10; Child: \$5; Concession: \$7.50; Family: \$25</p>

Appendix One

Financial Analysis



Appendix Two

Visitor Numbers 1987 – 2009

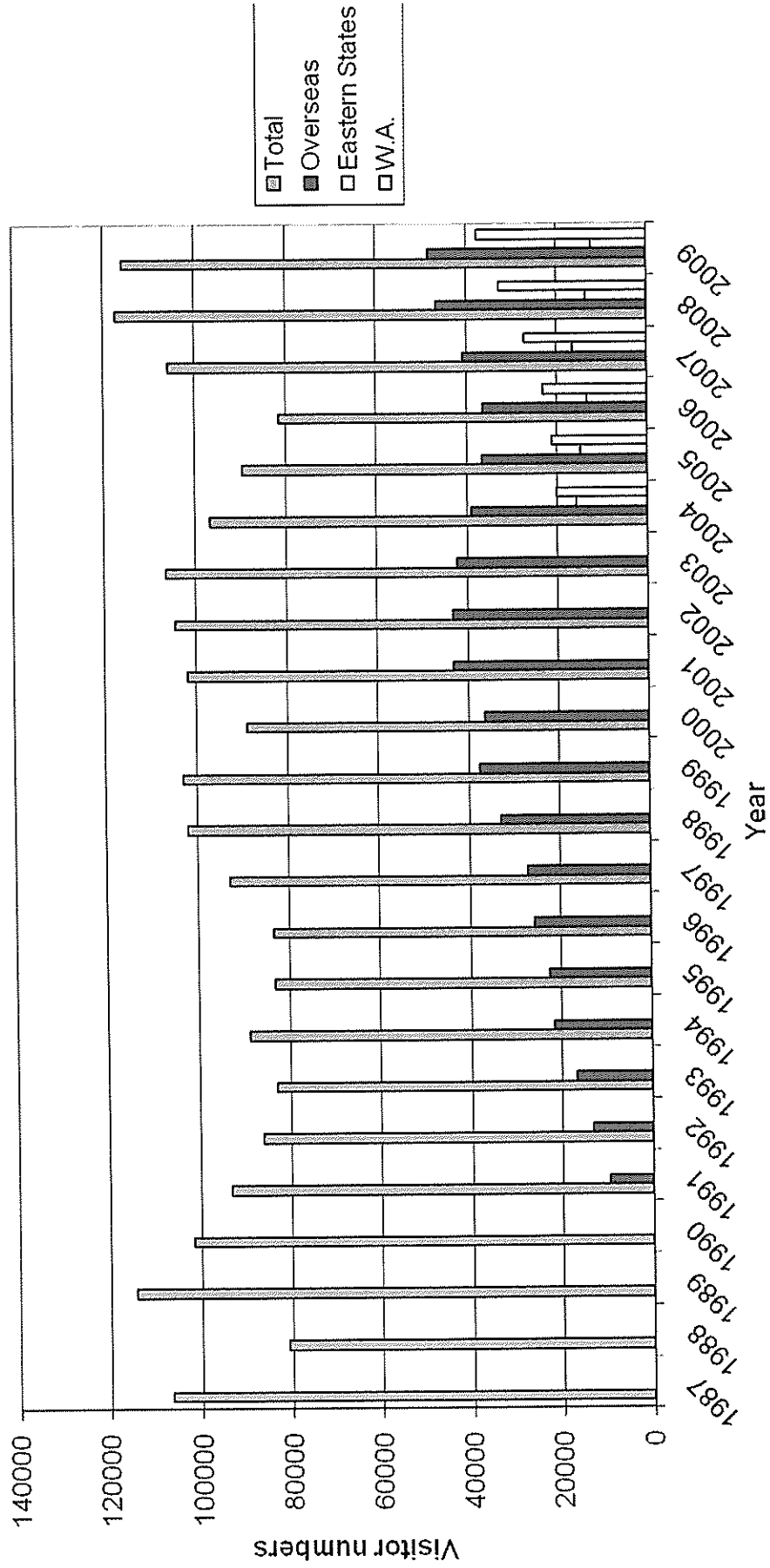
Year	Total	Overseas	Eastern States	Western Australia
1987	106,592			
1988	80,961			
1989	114,335			
1990	101,548			
1991	93,317	9553		
1992	86,383	131,136		
1993	83,220	16,581		
1994	88,892	21,472		
1995	83,294	22,385		
1996	83,672	27,075		
1997	93,178	27,075		
1998	102,081	32,866		
1999	103,076	37,679		
2000	88,948	36,491		
2001	101,946	43,188		
2002	104,607	43,154		
2003	106,364	42,182		
2004	96,685	39,104	15,735	20,050
2005	89,801	36,508	14,840	21,061
2006	81,561	36,434	13,306	23,009
2007	105,856	40,795	16,388	27,159
2008	117,215	46,498	13,540	32,636
2009	115,725	48,235	12,383	37,515

Source: Department of Environment & Conservation

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Figure One: Visitor Numbers Combined Graphn

Visitors To Monkey Mia



Monkey Mia Experience Assessment Matrix

Element	Experience	Suggested Actions
<p>Branding: Logos, Livery, Image</p>	<ul style="list-style-type: none"> ● There is a brand for Monkey Mia but it is very corporate and does not translate well onto merchandise. ● Staff members do have a uniform but they all seem to be wearing something different – there is a need for consistency in uniforms, clear visibility about who is staff and also a higher degree of neatness and professionalism – shoes, shorts/trousers, shirt. ● The staff members have a mixed image with the public and other stakeholders. Whilst they are seen as experts in the dolphin field they are often seen as officious and unfriendly. Some training is required to ensure that staff feel equipped to deal with crowd management and are able to relay messages in a positive manner. 	<ul style="list-style-type: none"> ● Develop a specific brand for Monkey Mia that reflects the values of the experience and is attractive to the visitor. ● Ensure that all staff have the same uniform and are presented in a professional manner at all times (i.e. wearing shoes when not in the water etc) ● Ensure that staff members have training in customer service principles and interpretation methods for crowd management.
<p>Marketing</p>	<ul style="list-style-type: none"> ● There is little or no marketing from the Department of Environment & Conservation (DEC) and relies on third party marketing from the Shire, Resort, other tour operators and Australia's Coral Coast Tourism Association. ● DEC does have some information on their website but this is minimal and not promotional. DEC sees its role as education and awareness building relating to conservation and management of the dolphins rather than attracting more tourists to the area. Many of the links also do not work. 	<ul style="list-style-type: none"> ● DEC to review their website for the commercial aspects of their operation and provide better information and more engagement with the public. ● Use images and information to set realistic expectations for the Monkey Mia experience. ● Work with partners to ensure that images and text reflect the true experience at Monkey Mia.

⁹ Monkey Mia Dolphin Resort website 40+ things to see when you're next at Monkey Mia. Accessed 7/01/11 <http://www.monkeymia.com.au/site/files/57519/Monkey%20Mia%20Dolphin%20Resort-%20Things%20To%20Do.pdf>

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Audience 	<ul style="list-style-type: none"> ● Some of the marketing distributed by other operators does create a misleading impression of the experience including statements like – "Everyday between approximately 8am and 1pm, four adult female dolphins and their children swim to the beach to be fed. There is no charge to meet or feed the dolphins."⁹ ● Australian interstate and intrastate visitors. ● Some internationals from a range of countries including UK, Singapore, Malaysia. ● Some visitors do not have good English language skills and as such struggle with understanding commentary and instructions. ● Australian visitors resent having to pay an entry fee – they see it as an additional tax ● International visitors seem to be more accepting of the need to pay for this kind of experience ● A range of age groups is attracted but there is no specific commentary for younger visitors and there are no facilities for the mobility impaired visitor 	<ul style="list-style-type: none"> ● Make it much clearer that there is a fee to be paid at Monkey Mia to access the reserve ● Provide written instructions in a range of languages to assist visitors and ensure they don't have to be shouted at.
<ul style="list-style-type: none"> ● Pre Visit Interaction 	<ul style="list-style-type: none"> ● DEC does not have full control over the visitor interaction pre visit. ● Third parties who run tourism operations in or to the area carry out most of the marketing and promotion. ● DEC's website is very static and does not provide any information about what to expect from the experience. 	<ul style="list-style-type: none"> ● DEC should develop a more interactive site that allows for the provision of information about the experience, images of the site and information in a range of languages to cater for international visitors that often do not know what to expect. ● Work with other operators to ensure that accurate messages are being disseminated.
<ul style="list-style-type: none"> ● Access 	<ul style="list-style-type: none"> ● The area is accessed mainly by car or bus. ● The site is 856 km from Perth and 25 km from Denham the nearest town. 	<ul style="list-style-type: none"> ● Man the gate early in the morning to smooth the early access to the site and ensure more people pay registration

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Element	Experience	Suggested Actions
	<ul style="list-style-type: none"> ● Monkey Mia is 150km off the main highway North, the dolphins are the main draw for Monkey Mia and Denham. ● There is an airport locally, which is owned by the Monkey Mia Resort; about 2500 visitors arrive by plane. ● Changes to the air carrier may impact the potential to increase air access as the new operator does not have links into the international tourism markets but currently focuses on the transportation of miners. ● There are still some coach companies that have Monkey Mia on the itinerary; some do Monkey Mia as a 24-hour return trip. ● Visitors have to enter the site through a tollgate. There is one sign about 20km from the site that indicates there is a fee payable to enter the park. This information is not repeated until you arrive at the site. The sign with the fee information is quite busy and cluttered so it is not unthinkable that people would miss the information. ● Signage at the entry is confusing and there is some confusion as to what to do with local people by passing the tollbooth and many visitors just ignoring it when it is not manned and entering without paying. ● Early in the morning there is a bottleneck due to the complexity of the self-registration. This is relatively straightforward if you speak English but international visitors seemed to struggle. 	<ul style="list-style-type: none"> ● early in the morning. ● Include signs along the way (like in other parks) that indicate that a fee is payable at the site – this will get people ready to pay.
<ul style="list-style-type: none"> ● Parking 	<ul style="list-style-type: none"> ● There is ample parking for day visitors although there was some comment from the site manager that the circulation of this parking is not optimal. ● Signs were clear about where to go for the attraction. ● No signs about paying once you are past the gate 	<ul style="list-style-type: none"> ● Review the parking to ensure that it is optimal. ● Undertake random compliance checks to encourage people to pay their entry fees.

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Element	Experience	Suggested Actions
<p>Welcome</p> <ul style="list-style-type: none"> ● First Impressions 	<ul style="list-style-type: none"> ● No enforcement of park entry fees ● Most visitors are first time visitors although locals in Denham that they can get away without paying a fee – this does not help with the revenue generation targets tell some. 	
<ul style="list-style-type: none"> ● First Impressions 	<ul style="list-style-type: none"> ● The site is clean, signage is informative and the location feels safe. ● The visitors enter through a walkway from the car park. There is some signage at the entry way but few people stopped to read it since they were rushing to the beach to see the dolphins. ● DEC staff were keeping people on the boardwalk as there was a new baby dolphin and they wanted to minimize the amount of time people were in the water. ● There is an amphitheatre that could be used to brief visitors about the protocols and what to expect. This would also be a good time to ensure that people had paid and to give them some early information about the dolphin experience. ● The buildings look tired and the high windows need cleaning ● There seemed to be quite a bit of dust in the interpretation centre. ● All of the public areas are closed when the majority of people are arriving – shop, theatre and interpretation centre open at 8.00 when most people seem to have already arrived by 7.30. 	<ul style="list-style-type: none"> ● Gather visitors in the amphitheatre and use this for the pre beach briefing so all can hear and will understand what is going to happen and what they are required to do. ● If not keen to open the centre before 8.00 at least have some staff present and available to answer questions rather than just to police folk off the beach.
<ul style="list-style-type: none"> ● First Staff 	<ul style="list-style-type: none"> ● The first staff the visitor meets is the DEC staff members that are trying to keep them off the beach. There is some minor interaction with visitors in their immediate vicinity but most of the guests cannot hear what is being said. 	<ul style="list-style-type: none"> ● The interpretive experience should begin as soon as guests arrive – using the amphitheatre will encourage people to understand the importance of working with the Rangers.

Element	Experience	Suggested Actions
<ul style="list-style-type: none"> Uniforms 	<ul style="list-style-type: none"> There appeared to be a range of uniforms – there should be one and it should be neat and tidy to present a professional impression. Uniforms were in evidence for both staff and volunteers but there were a great variety of shirts, shorts and shoes being worn. All staff should be neat and tidy and wearing the same uniform to ensure that guests know who is managing the experience. 	<ul style="list-style-type: none"> Rangers need to be presented in a professional manner. Ensure everyone has the same uniform and guests know who is managing the experience.
<ul style="list-style-type: none"> Greeters 	<ul style="list-style-type: none"> There are no greeters although staff are friendly it is clear that they are there in more of a protection/policing role. Should use the opportunity before the first feed, as a means of starting the engagement with the visitor and creating a sense of team where everyone involved is part of protecting the dolphins and not made to feel like the dolphins are being protected from them. 	<ul style="list-style-type: none"> Train staff to develop a strong rapport with the visitors at the beginning of the experience – creating a team atmosphere rather than an adversarial one.
Orientation		
<ul style="list-style-type: none"> Transitions Zone 	<ul style="list-style-type: none"> There is a lot of signage in the transition zone between the car park and the main viewing area. Brief observation showed that people did not register the signs or the retail area. There is also signage at the end of the boardwalk, which is small, and relatively inconspicuous – thought should be given to creating a more visually appealing and permanent sign guiding people to the amphitheatre for the pre experience briefing. 	<ul style="list-style-type: none"> Consideration should be given to repeating the signage at the other end of the walk way and moving the shop to the theatre where people are more likely to notice it and use it.
<ul style="list-style-type: none"> Left Hand Bias 	<ul style="list-style-type: none"> Amphitheatre is on the right hand side so is generally ignored. More activation of this space would create a focus for visitors entering the experience zone. The shop is on the right in the transition zone so could potentially go unnoticed by visitors arriving through the car park who may then return to their 	<ul style="list-style-type: none"> Activate the amphitheatre before the first feed and use as a gathering place for tours and activities throughout the day.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● You Are Here 	<p>cars via a different route – e.g. through the resort café or shop.</p> <ul style="list-style-type: none"> ● Entry signage is unclear and the tollbooth signage when not manned is confusing. Many people seemed to just bypass the queue and park without paying. ● There is very little orientation material at the site. People tend to follow other people rather than be guided by signage or maps. ● Signage is being developed for a walk trail, which is being developed. This is near the exit and near the transition zone for the whole site so is likely to be missed. Promotion through maps and signage at the visitor centre would provide people with visual clues as to what to do after the dolphin feed. 	<ul style="list-style-type: none"> ● Improve signage on the approach to the park ● Man the tollbooth early in the morning to capture the early morning guests who have been advised to arrive before 7.30 so they don't have to pay. Less important later in the day as visitor arrivals will be fewer. ● Create more maps that explain the site and what is available as well as promoting things to do on the site. This could be developed in conjunction with the resort to orient people to the whole site.
<ul style="list-style-type: none"> ● Way finding 	<ul style="list-style-type: none"> ● Way finding is very subtle and understated and easily missed. Some of the signage has also faded. ● Quite a lot of the signage has been made in house as a response to changing needs and ideas from staff. This is good but has the potential to look amateurish and will need to be done frequently to ensure it remains legible. 	<ul style="list-style-type: none"> ● Provide funding to create more visible signage to guide guests around the site. ● Create more prominent signage in the visitor centre area so that guests know where to go for information etc.
<ul style="list-style-type: none"> ● Placement 	<ul style="list-style-type: none"> ● Some of the signage is placed in locations where it will be missed – observation of where visitors go and how they interact with the signage will assist in more effective placement. ● Signage about the park entry fees are too far from the park (20km) additional signage should be placed close to the park in a less cluttered way – currently many visitors would be unaware they have to pay until they are funneled into the toll box. 	<ul style="list-style-type: none"> ● Improve signage leading up to the part – this is done well at the Pinnacles and Valley of the Giants.
Comfort		
<ul style="list-style-type: none"> ● Body 	<ul style="list-style-type: none"> ● The dolphin interaction zone is relatively 	<ul style="list-style-type: none"> ● If the theatrette remains in this location

Element	Experience	Suggested Actions
	<p>undeveloped so on sunny days visitors are exposed to direct sunlight and reflected sunlight for a number of hours.</p> <ul style="list-style-type: none"> ● There are some old shelters available on the beach, which seats about 6 people, and during the time we were there we saw around 15-20 people cramming in to find shelter. ● There is shade in the amphitheatre but this is not very well used. ● The theatre is air conditioned but dark and unwelcoming, given that the equipment used has changed and no longer needs black out to be visible, opening this space up should be considered. ● There is little shade on the site which could lead to visitors receiving quite severe sun burn – especially those who do not come from Australia and do not understand the dangers involved. ● There is little mobility-impaired access to either the dolphin experience or the beach. ● There is little vision-impaired interpretation. 	<p>remove the black out curtains and open the doors linking to the interpretation centre to encourage flow through and the let people know what experiences are available.</p> <ul style="list-style-type: none"> ● Provide more sheltered areas for visitors
<ul style="list-style-type: none"> ● Seating 	<ul style="list-style-type: none"> ● There is little or no seating in and around the visitor centre ● The amphitheatre has seating and shade but this is not well utilised. ● Table and chairs in the interpretation centre but this is relatively under utilized as it is away from the interpretation and in a dead zone of the interpretation centre. ● There is a grassed area where guests gather during the day. 	<ul style="list-style-type: none"> ● Provide more shaded seating at the site to encourage people to spend time in specific areas.
<ul style="list-style-type: none"> ● Toilets 	<ul style="list-style-type: none"> ● There are day use toilets at the back of the visitor centre. This is in the location between the interpretation centre and the resort. Toilets were basic but adequate. 	<ul style="list-style-type: none"> ● Clarify roles and responsibilities as they relate to the toilets.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Food 	<ul style="list-style-type: none"> ● There is some contention from the resort that DEC should be responsible for the cleaning, maintenance and upgrade of these facilities but that they do not clean them. The roles and responsibilities around this need to be clarified as dirty toilets next to a marine park give a very poor impression especially following the recent sewerage spill incident. ● DEC does not provide food as part of their experience. ● The Bough Shed Restaurant provides meals throughout the day to resort guests and day visitors. Many of the people who come to the dolphin feed will head towards the restaurant for breakfast after the feed. ● There is a pub within the resort, which is linked to the backpackers and provides pub meals. ● There is a shop on the resort that provides basic food supplies for resort guests and day visitors. The shop also provides drinks and snack food. 	<ul style="list-style-type: none"> ● Food is not part of the DEC experience. The provision of cold drinks could be incorporated into the offer but this would be in direct competition with the Resort and as such is not recommended.
<ul style="list-style-type: none"> ● Mental – Effort Vs. Reward 	<ul style="list-style-type: none"> ● The entry to the site is confusing and congested first thing in the morning and leads to many visitors not paying an entry fee. Some visitors were observed looking for somewhere to pay their fee once they had parked. ● The interpretation centre has a lot of information available on the dolphins and local culture and history. Much of this information is dated and many guests completely bypass it. ● The commentary on the dolphins is quite scientific and many of the younger visitors seem to be completely disengaged from the experience. ● The experience is often impossible to see unless you are in the front row on the beach. Visitors are frequently asked to get out of the water although in 	<ul style="list-style-type: none"> ● It may be considered worthwhile to provide the ability to pay entry fees once visitors have parked. This could be managed through the shop and guests could be provided with some kind of souvenir proof of purchase such as wristbands, souvenir ticket etc. ● Provide some kind of raised platform to enable visitors to see what is happening. ● Review the beach interaction set up to spread the crowds to other feeds and to provide alternative viewing spots.

Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Safety 	<p>many cases to be able to see anything the ends of the line have to curl around. This is a very frustrating experience.</p> <ul style="list-style-type: none"> ● Many guests move to the jetty to get a better view of what is happening. It is understood that this is not encouraged as this is a commercial jetty and causes conflict with the commercial operators. ● There is a real danger of visitors being exposed to excessive sun in the morning due to the prolonged nature of the feeds and the lack of shelter on the beach or around the shelter. ● There is a potential for conflict with the tour operators with guests that use the jetty to get a better view of the experience. ● The large number of guests crowding onto the beach in the morning could have a detrimental affect on the welfare of the dolphins. ● The expansion of the resort could severely impact on the quality of the experience is changes are not made to the way the guests are managed. 	<ul style="list-style-type: none"> ● Provide more shelters on the beach. ● Provide an alternative viewing area ● Develop procedures to manage the number of visitors that can be present for each of the feeds. This will need to be developed to cater for the increase in guest numbers as a result of the development of the resort.
<ul style="list-style-type: none"> ● Cleanliness 	<ul style="list-style-type: none"> ● Volunteers are given some cleaning duties such as cleaning the windows on the fish room and sweeping the board walk. ● The interpretation centre is quite dusty ● The windows in the interpretation centre are dirty – this appears to be mainly due to the design of the building, which has high windows that are not capable of being cleaned by staff, and require special working at heights qualifications. ● Theatrette was cluttered with tables, chairs and other equipment, which was not being used. ● The resort complained that the toilets were the responsibility of DEC and were not cleaned. 	<ul style="list-style-type: none"> ● Incorporate a regular cleaning regime for the high level windows. ● Ensure excess equipment is stored out of sight of the public.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> 9Communication Theme 	<ul style="list-style-type: none"> There is no single clear theme which all of the staff were working to communicate. Staff members had generally not received any training on how to develop or deliver interpretation and had learned the good and bad habits of other staff members. Staff members are being asked to train each other with no experience or training. Interpretation experience across the state varies, a standard manual, which provides basic skills, and knowledge on how to develop engaging experience would be helpful. 	<ul style="list-style-type: none"> Instigate a training regime for interpretation staff. If internal staff are to be used to train their colleagues they should be given Training and Education Training and be guided by materials developed centrally. Having a centrally agreed basic interpretation manual would ensure consistency across the state and create a higher quality of interpretation. Experiences should not be all the same but should meet a standard
<ul style="list-style-type: none"> Communicating the Theme 	<ul style="list-style-type: none"> One of the major messages that the rangers are trying to get through is the importance of managing the welfare of the dolphins – there was some complaint from the resort that this was done in such a way as to make the visitors feel bad about their behaviour (unfairly). Staff members see themselves as the protectors of the dolphins and the guests as potential aggressors. There needs to be a more sympathetic approach to the visitor/dolphin interaction whilst maintaining the welfare of the dolphins. With such large crowds it is difficult to have much of an interaction with the visitors. By providing a range of more intimate interpretation experiences would be possible to create a stronger connection with the visitors and a better understanding of the needs of the dolphins. There is little interaction with visitors after the dolphin feeds other than to tell them to get off the beach or out of the water. 	<ul style="list-style-type: none"> Staff to develop a central theme and agreed messages that can be included in all communications both written and verbal. Some of this work will no doubt have been done for the development of the interpretation centre.

Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Written Communication 	<ul style="list-style-type: none"> ● Additional interpretative activities could be developed to engage the guests after the feeds and to share information about the broader values of the site – i.e. making it about more than just dolphins. ● Much of the written communication is missed, as visitors don't see it. The signs near the entry to the site are often ignored by visitors due to their placement. ● Many visitors do not go into the interpretation centre and if they do they many will not read all of the signage as the layout is not conducive to people spending a lot of time in there. ● Many of the signs have been developed post interpretation centre and as such they are A4 sheets that have been laminated – there needs to be an ongoing budget to cover the cost of interpretation upgrade. ● The interpretation centre is very static and tired. Images are peeling off and whilst there is a significant amount of information and props and exhibits these are not used to their full potential. ● There is little or no communication in languages other than English 	<ul style="list-style-type: none"> ● Incorporate a budget to refresh the interpretation at the centre ● Develop interpretation sheets in languages other than English providing the key messages and instructions on the how interaction works.
<ul style="list-style-type: none"> ● Tone of Voice 	<ul style="list-style-type: none"> ● The tone of voice is very serious, science focused and a bit preachy. Interpreters take themselves and their role very seriously and there is little room for a more personal experience. ● There has been some complaint about the staff being rude and officious. ● There has also been some complaint about the tone of the presentation which talks about people interfering with the dolphins and putting beer and cigarette butts down their blow holes – the people at the Resort said this was a myth and had never 	<ul style="list-style-type: none"> ● Make sure the messages given to the public are positive. ● Create a more approachable interpretation to engage visitors rather than erecting barriers between the visitor and the staff ● Train staff in managing conflict and dealing with crowds in a positive way.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Signs 	<p>happened, they feel this kind of story is negative and puts Western Australian's in a bad light especially since this is hearsay in many cases.</p> <ul style="list-style-type: none"> ● There is a wide array of signs around the site including regulatory, directional, safety, instructional and interpretive. ● The interpretation centre signs are generally in good condition although the whole centre could benefit from being refreshed. ● Some of the signs have been developed in response to a more recent need, such as keeping people off the beach because of the new baby. These are temporary in nature but more professional, permanent signs could be used to create a new way of managing guests ● Some of the displays are starting to peel within the interpretation centre; these should be fixed properly or removed (e.g. images of sea grass under the model dugongs, which has been stuck on with sticky take). 	<ul style="list-style-type: none"> ● Create a budget for the updating of signs for the updating of the interpretation signage. ● Create permanent signage to guide guests in the interaction – this could be in the form of professionally printed tent signs.
<ul style="list-style-type: none"> ● Languages 	<ul style="list-style-type: none"> ● All information is given in English. There is no translation into any languages and this can lead to guests being told off for not doing the right thing when they simply do not understand. ● Some volunteers are also from non-English speaking backgrounds and this causes some issues with the training as none of the DEC staff speak any other languages. ● It is important to provide some level of interpretation in other languages even if this is only basic information and instructions. The rise in the Chinese market means that it is going to become more important to be able to communicate with international guests effectively. 	<ul style="list-style-type: none"> ● Develop basic conduct and interpretation information in a range of languages.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> Spoken Communication 	<ul style="list-style-type: none"> DEC interpreters are very knowledgeable and committed to the welfare of the dolphins. The first communications most people have with DEC officers is the gate where they are being asked to pay an entry fee – for some visitors this is seen as an imposition and can lead to some conflict The next interaction for many people is being told to get off the beach or out of the water – for many people who do not understand English this is a negative experience. Many of the resort's visitors are informed that the whole experience is free through the various parts of the Monkey Mia Resort website – they are then given a rude shock when they have to pay. The commentary on the beachfront is very focused on the dolphins and rangers often have to keep talking as they wait for the dolphins to arrive. There is little focus given to other aspects of the world heritage area or other things visitors can do whilst they are in the region. The current experience is aimed at the well-educated adult market with little specific content for kids or international visitors; there is an opportunity to diversify the experience to include these other markets. 	<ul style="list-style-type: none"> Give staff members training on dealing with difficult people and face-to-face guiding. Use the rangers to offer a range of experiences, for a range of audiences
<p>Sensation</p> <ul style="list-style-type: none"> 5 Senses 	<ul style="list-style-type: none"> Sight – The majority of this experience is visual – relying on the dolphins coming to the beach. Many visitors cannot actually see what is happening due to the interaction set up. Children definitively have trouble seeing anything unless they are at the front of the crowd. Pelicans and Emus were also present on the beach and could be made to be part of the experience. 	<ul style="list-style-type: none"> Develop alternative interpretive experiences that can be offered when Dolphins do not come in or for after the dolphin experience. Develop interpretive programs that incorporate the five senses – e.g. echo location in dolphins, what do dolphins eat, plants and shrubs of the region –

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Element	Experience	Suggested Actions
	<ul style="list-style-type: none"> ● Sound – The audio commentary is the way most of the communication is undertaken. Whilst an effort has been made to improve the equipment used there are still issues in reliability of the signal when there are large numbers of people on the beach. ● There is an opportunity to extend the experiences offered to include additional walks, talks and interactions – this should be pursued to provide additional reasons for people coming to the site and an alternative should the dolphins not come in. ● Touch – the visitor centre has a touch table but there is little or no interpretation of the items there – this is another opportunity for interpretation and could also be part of the pre beach briefing experience. ● Taste – is not catered for at the DEC experience but there is a number of eateries on the site. ● Smell – this aspect of the experience is generally not catered for but should guided walks be included there may be scope to include some aspects of smell with native vegetation. 	<ul style="list-style-type: none"> ● Refresh the interpretive facility
<ul style="list-style-type: none"> ● Using vision to it's full extent (lighting etc) 	<ul style="list-style-type: none"> ● The whole attraction relies on ambient light – the dolphin feeding is on the beach, the amphitheatre is not used at night, the interpretation centre is not lit artificially. The theatre uses black out curtains, which are not really necessary given the equipment being used. ● Some multi media touch screen exhibits were in place when the centre opened but this was not robust enough for the environment and had to be removed, as it was invariably not working. 	
<ul style="list-style-type: none"> ● Practical Magic 	<ul style="list-style-type: none"> ● The fact that the dolphins are pretty reliable counts as practical magic (i.e. a repeatable surprise). The dolphins are also very charismatic and do exhibit 	

Element	Experience	Suggested Actions
<p>Evaluation</p> <ul style="list-style-type: none"> ● Front Line 	<p>behaviours which the guests find very engaging.</p> <ul style="list-style-type: none"> ● Great customer service is also something that could be taken on to provide a memorable experience for visitors – currently the service at both the resort and the DEC visitor centre is indifferent at best 	<ul style="list-style-type: none"> ● Feed this information back to the management committee (if this is reformed) ● Work with the resort to ensure accurate pre visit information
<ul style="list-style-type: none"> ● Trends 	<ul style="list-style-type: none"> ● Staff on the tollgate get a significant amount of feedback from the visitors often negative due to their lack of knowledge about the entry fee. ● Some satisfaction surveys have been undertaken but there is no feedback sheets in place ● Use staff knowledge and experience to guide the new developments in the experience. ● No information is gathered about the visitors – basic postcode information would give more accurate information about who is visiting and assist in the development of targeted marketing as well as accurately identifying any language needs ● A lot of new technology is now in place that will allow additional experiences to be provided without a significant cost of impost on time – Podcasts, Smart Phone Apps etc can all be developed for the site and some of this information could deal with the issues of lack of understanding – Google is currently working on a real time translation app for android – this could solve a large number of problems on site with both volunteers and visitors. 	<ul style="list-style-type: none"> ● Gather basic information to assist in the development of the visitor experience ● Keep an eye on the changes in technology that could be used to improve the experience for guests and volunteers.
<ul style="list-style-type: none"> ● Ask the Audience 	<ul style="list-style-type: none"> ● Engaging the audience in conversation will assist in the affective development of the experience – simple questions like what was your highlight, what could we do better are ● Most staff contact with the public is centered on compliance rather than informal engagement. 	<ul style="list-style-type: none"> ● When rangers are not doing the morning feeds an effort should be made to engage with guests on the beach and around the resort to create a positive feeling and a connection with guests.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Two Way Communication 	<ul style="list-style-type: none"> ● There is little opportunity to have a two-way conversation with the visitors. There is no capacity on the web site to get feedback and rangers are not available after the morning feed to chat with visitors. ● DEC is not on Facebook, Twitter or YouTube and no one does a blog – these are all opportunities to set up a dialogue with the visitor. ● DEC currently relies on the Resort to deal with all of the visitors – this does not provide the ability for the “experts” to speak to the guest. 	<ul style="list-style-type: none"> ● Investigate the use of social media for this and other commercial sites to allow DEC to set up a two-way conversation with their guests.
<ul style="list-style-type: none"> ● Pricing, Product Hours 	<ul style="list-style-type: none"> ● Part of the conversation with the guests should include their thoughts on the price of the product, whether the hours work, what other products they would find attractive. ● Currently the only offering is the beach feed and some school holiday programs – it would add to the attract, encourage longer visits and potentially increase repeat visits if a range of other experience were also offered. Audience feedback would be vital during the development phase. ● The staff regularly receives feedback from the visitors about the gate price; this is potentially because it is a surprise for many visitors. 	<ul style="list-style-type: none"> ● Use audience feedback to develop additional experiences and to get feedback on a fair price for the experience. ● Give visitors more information before they arrive about the entry fee and what you get for your money.
<ul style="list-style-type: none"> ● Creating Partnerships 	<ul style="list-style-type: none"> ● There is a huge potential for creating partnerships but there is also a significant amount of “history” that will need to be overcome to make this a real possibility. ● Work is already starting with the shire to sell tickets for Monkey Mia at the Shark Bay World Heritage Discovery Centre, additional partners selling entry tickets would be good for Monkey Mia and also make it more convenient for the visitor. ● The major partner to work with will be the resort since the source of upset seems to be mainly the 	<ul style="list-style-type: none"> ● Create strong partnerships with the Resort, Shire and other tour operators and businesses in Denham. ● Work with coach and tour operators to create experiences that add value for their customers.

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Element	Experience	Suggested Actions
	<p>resort guests who have already paid a high accommodation price and are then asked to pay an entry fee. Creating a positive partnership with the resort is vital since they are the main entity promoting Monkey Mia so they need to be promoting messages that fit with the experience and also prepare the visitor for the experience.</p> <ul style="list-style-type: none"> ● There are a number of tour operators in the region and DEC sells many of their products through the visitor centre. Creating strong partnerships with these organisations will also assist in the delivery of a consistent product. ● Broader partnerships with the tour companies that bring a significant number of visitors through the site is important. Working together to create value add experiences for these clients will assist in creating a value experience. 	
<p>Finale</p> <ul style="list-style-type: none"> ● Closing the Deal – Repeat Visitation 	<ul style="list-style-type: none"> ● The majority of visitors to Monkey Mia are first time visitors, which suggests that repeat visitation is low. This could be a for a range of reasons Monkey Mia is not an easy location to get to so it is somewhere that people are travelling to on purpose. It may be seen as a once in a lifetime experience or people may be so overwhelmed by the experience that they don't want to repeat it. ● Whilst many of the international visitors will not come back it is imperative that they promote the experience to their friends and relatives as a must do experience for the ongoing survival of the businesses there. ● Domestic visitors are more likely to be the ones that will potentially visit more than once. As it stands at the moment the experience is fairly limited with the 	<ul style="list-style-type: none"> ● Develop a range of additional experiences that can be offered to visitors to enhance the experience and encourage repeat visitation and word of mouth promotion.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Souvenirs 	<p>dolphin feeds being pretty much it in terms of guided interpretive experiences. Developing additional experiences to create a stronger connection with guests is an important aspect of the visitor experience that is currently lacking.</p> <ul style="list-style-type: none"> ● A range of souvenirs is offered through the shop. These range of standard tourism trinkets like spoons, badges, etc to higher end images and collectibles. Generally speaking the quality of the merchandise is good and the display is Ok although it could be improved by using proper retail shelving etc. ● Souvenirs should be Australian made where possible. The Resort shop sells many of the lower end "Made in China" type souvenirs so the DEC outlet should sell DEC merchandise and souvenirs linked to the site. A policy has been implemented to carry mainly local souvenirs where possible. Working with the other commercial retail outlets at Walpole and the Pinnacles would allow for further development of this part of the experience. Little Light and Local is a good retail philosophy – sourcing merchandise that visitors can easily transport home but that also has a link to local unique products such as pearls, jewelry, books etc. ● One of the major issues with the retail space is its location at the back of the centre. Generally speaking people miss the shop on the way in and many leave a different way so they don't see it on the way out either. A better position would be the theatrette location as this would enliven the interpretation centre and it is also closer to where many of the visitors go after the dolphin feed. This would also make the sale of tours more effective as 	<ul style="list-style-type: none"> ● Source local products that have a story to link back to Monkey Mia when people have returned home. ● Relocate the shop to the theatrette and move the theatrette to the old shop location. This could also then be used for talks and presentations linked to the site, research and the world heritage area.

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Element	Experience	Suggested Actions
<ul style="list-style-type: none"> ● Creating Connections 	<p>people would be able to find it easily.</p> <ul style="list-style-type: none"> ● There is little or no way of maintaining contact with visitors once they have left. Most visitors are anonymous. Having some way that people can share their experience once they have left is important, especially with the current trend towards social media and creating conversations about places. Having some way for people to post their images, send in their stories and create an ongoing connection with a place is important. Having a more interactive website would provide a means of people doing this. ● It is important for a site to use its icon. In the case of Monkey Mia this is clearly the dolphins. Creating "Adopt A Dolphin" packages may be one way of creating an ongoing connection with the visitors. Providing a newsletter, which updates people on the progress of the dolphins and information about research and upcoming activities, would be a good way of creating an ongoing connection with visitors as well as a means of generating additional revenue. This could be quarantined for research purposes, which may also increase the appeal of this kind of merchandise. 	<ul style="list-style-type: none"> ● Create ways of creating ongoing connections with visitors through social networks of blog/image sites that allow people to share their images or stories. ● Create a program that creates an ongoing link to visitors. This could be an "adopt a dolphin" package or just a newsletter. This will be additional work for staff but is a means of creating ongoing connections and improving the experience.

Appendix Four

SWOT Analysis Details

Strengths

Staff issues, structure, roles, rosters and training

- Staff – well educated, passionate and excited by the dolphins.
- DEC organisational support.
- Volunteers – Passionate and excited.
- Part of a broader Government Agency, which provides support and backup. DEC Communication when an event happens such as the arrival of calf via press releases and messages on the Shark Bay web site etc.

Infrastructure design and layout - shop, merchandise and signage.

- Walk Trail upgrade and addition of trail head and interpretation signs
- Good infrastructure.
- Point of Sale System installed.
- Remote “natural” location – as opposed to the Bunbury and Rockingham Dolphin experiences.

Interaction/interpretation and experience management.

- Public Awareness of MM dolphins.
- Dolphins' interaction.
- Iconic Experience.
- Premier attraction.
- School holiday activity programs.
- Marine Scientists and researchers provide advice to MM visitor operations regarding the best practice of the interaction with the Dolphins.
- Marine researchers want more space to expand their research activities.
- Relatively low entry fees – Good Value for Money.
- Scientific value.
- World Heritage area.
- Marine science Interpretation/education.
- DEC Sea Grass and Marine research.
- Visitor numbers have remained steady.
- Captive audience.

Other external, Resort and Shire etc

- Partnership with Shire to sell tickets in Denham.
- Tourism WA marketing of destination.
- Renowned Dolphin foundation research.
- Coral Coast tourism association marketing of destination.
- Shark Bay Tourism Association marketing of destination.

- Growing Denham business and community support and understanding about the role of the MM attraction
- Tour Operator Marketing.

Weaknesses

Staff issues, structure, roles, rosters and training

- Staff roles and rosters. Shop/interpretation/beach functions.
- Staff pay/award issues.
- Denham management and MM staff issues. Lack of communication, miss understanding and perceptions of undervalued.
- Staff manuals, policies and procedures are complex and or not clear
- Lack of training for MM staff in interpretation, customer service (inc dealing with difficult customers), crowd control, retail management and computer systems.
- Volunteers' induction program. Language barriers. Time consuming induction.
- Messages from leadership unclear.

Infrastructure design and layout - shop, merchandise and signage.

- Infrastructure layout underutilisation and high maintenance.
- Lack of knowledge on how to Use of the Point of Sale system. Lack of shop stock analysis.
- Shop site, signage, and layout.
- High turnover of volunteers.
- Ordering of the wrong/inappropriate stock for sale in shop, freedom to chose stock
- Signage at gate, car park and building, traffic management, entrance congestion
- Tour sales and commissions don't cover resources.
- Site layout – car park, entry access etc
- Current viewing area, use of the commercial jetty, presentation on the beach

Interaction/interpretation and experience management.

- Interpretation/education and interaction. Current interpretation area and amphitheatre underutilised. Current interperpretation needs to be refreshed.
- Lack of Interactive interpretation and education activities for visitors.
- Overcrowding at interaction during peak times.
- Angry and rude visitors.
- Gate and fees collection system not working, costs are not covered through sales and entry fees, people avoid paying fees where possible.
- Remote location and distance from Perth.
- Communication with visitors, Resort, Tour Operators.
- Visitors don't see the difference between DEC and the Resort.
- Reliance on dolphins for the experience.
- Current viewing on the beach and use of the jetty.

Other external, Resort and Shire etc

- Money/tourism or conservation confusion?
- Resort service fee for power and water etc.
- Relationship with the resort.
- Resort doesn't collect/recover 100% of guest entrance fees.

- Shark Bay Shire \$40,000 fee.
- Lack of Visitor Centre MM Dolphin communication and promotion by DEC.
- Lack of strong brand awareness.
- Lack of staff and community ownership of World Heritage Area

Opportunities

Staff issues, structure, roles, rosters and training

- Review staff structure and identify a need for a site manager.
- Ensure staff are fit for role. Match staff to roles/career goals.
- To do a review of staff training in interpretation, retail management, customer service, and crowd control.
- Review staff office accommodation to include hot desks so Manager PVS and Marine Rangers can work from MM

Infrastructure design and layout - shop, merchandise and signage

- Make better use of the current infrastructure such as the Amphitheatre.
- Promotion of the WH value area and not just MM.
- Shop merchandise increased sales and better management/analysis of stock.
- Shop layout to reduce stock loss due to theft.
- Combine Shop and Interpretation centre.
- Web On-line merchandise shop.
- Investigate ways to improve the efficiency of shop and tour desk operations through location, layout, opening times etc.
- Investigate ways of engaging long term visitors into the volunteer program possibly as ambassadors

Interaction/interpretation and experience management.

- Undertake a review of the volunteer program.
- Improve the interpretation and education. Look to Review, Refresh and Reactivate interpretation centre (air conditioning)
- Broaden the Holiday activity program to run over a longer period.
- Video for Volunteer induction.
- Dolphin interaction video for sale to visitors.
- Introduce premium interaction experience.
- Volunteers pay for experience packages.
- Value add - Volunteer packs/giveaways.
- Monkey Mia information packs for sale (adopt a Dolphin package).
- Investigate the possibility of introducing commercial opportunities such as Photos.
- Create more guide led interpretation programs throughout the year to keep visitors at the centre.
- Investigate the best way to achieve a more even spread of visitors at each interaction/feeding time.
- Review of the dolphin viewing and possible introduction of a platform.
- Potential to link to a much broader range of activities and experiences in the region.
- Make use of the Dolphin researchers to run education programs.

Other external, Resort and Shire etc

- Self sufficient water/power services.

- Create a strong brand for the experience.
- Create stronger links with resort, shire and other tour/ commercial operators.
- National landscapes.
- Nature bank site.
- Develop a research facility. Utilise researchers for presentations to public
- Link into the broader research program to engage visitors in the WH Area.
- Stronger web presence – include You Tube, e-commerce, two way interaction etc

Threats

Staff issues, structure, roles, rosters and training

- Dysfunctional staff structure and environment.
- Loss of staff.
- Unrealistic expectations of job roles
- Staff and volunteers not reading, nor understanding policies and procedures leading to accidents. Possible language issues.
- Staff not developed and trained to operate POS computer system.
- Staff/volunteers are not trained in interpretation practices.
- Staff/volunteers are not aware of dolphin interaction procedures.

Infrastructure design and layout - shop, merchandise and signage

- Shop sales decline. shop theft.
- Accident at gate due to lack of signage and speed control.
- Resort Shop competition.

Interaction/interpretation and experience management.

- Dolphins don't come in to feed or public pressure not to feed them.
- Older dolphins die.
- Budgets cut and no funding of research, staff and volunteers.
- Visitor numbers decline due to poor experience.
- Overcrowding and poor crowd control leads to angry and frustrated visitors.
- Volunteers don't turn up due to lack of transport or are attracted elsewhere.
- Public/visitors lose interest/understanding about MM due to lack of promotion and education.
- Angry and rude visitors threaten staff.
- Resort expansion leads to overcrowding.

Other external, Resort and Shire etc

- Gate fees decline.
- Negative comments by visitors, Resort, and Tour Operators leads to bad public relations and publicity.
- Lack of direction and core messages leads to miss communication of messages to general public.
- Resort entrance changes with resort expansion.
- Denham accommodation businesses provide the wrong information regarding fees.
- Resort communicates/promotes it is free to feed the dolphins.
- Research on the Dolphins declines.
- Resort increases service fees.

- Sewerage spills, boating accidents etc that could affect the dolphins
- Resort takes over the running of the MM visitor centre and dolphin research.
- Lack of strong positive engagement with local community & perception of role of DEC in tourism (i.e. they should do more target marketing)
- Tourism development issues won't be handled locally due to reduction in Tourism WA regional staffing.

Appendix Five

PEST Analysis Details

Political

Ecological, Environmental, Legislation, Regulation, Funding etc:

- Local Government Relationship
- Relationship with Aspen Parks
- Federal Government Grants Programs
- State Election 2012
- State Government Budget
- Where tourism and environment sit within State Government priorities
- Decline in support for regional tourism development through Tourism WA
- Review of the CALM Act
- Naturebank Program
- World Heritage Responsibilities (UNESCO) – MM as part of the WHA
- Royalties for Regions funding

Economic

Market and Industry Trends:

- State Government funding priorities
- Economic situation in traditional generating markets (Europe, UK)
- Decline in domestic tourism
- Growth in WA Market propensity to travel overseas
- Airline seat capacity
- Price discounting on international and domestic routes
- Strength of the AU\$ making overseas travel more attractive for Australians
- Strength of the AU\$ Australia expensive for overseas markets.
- Growth of mining and impact on staff availability
- Need to rejuvenate the product
- CHINDIA Market – growing and looking for unique experiences
- Costs associated with maintenance & development of the product
- Royalties for Regions
- Price of petrol

Social

Lifestyle Trends and Demographics:

- Retiring Baby Boomers – independent travellers but may have special needs
- Volunteer Pool growing but with different needs
- Increasing birth rate (increasing demand for family activities)
- Increase in travellers from China & India (CHINDIA) will need a different kind of interpretation
- Well known experience but not could brand it more strongly
- Community Support?
- International attraction but far from Perth
- Trend away from feeding wildlife – tide may turn against the activity
- DEC does no marketing therefore reliant on third party promotion of the experience which they have control over

- Experience concentrated on 2-3 hours in the morning – leaving staff and infrastructure idles for much of the day
- Access to trained and motivated customer focused staff locally
- Expectation vs Reality
- Decline in domestic tourism and increase in travel overseas (21% increase in WA)
- Consumers remain price sensitive
- Australia is seen as a safe location
- Increasing level of air travel from the Eastern States

Technological

Developments e.g. technological access etc:

- Web Presence – limited to corporate website.
- Limited use of social media and interactive communication with visitors and ongoing relationships – consumer generated web based tourism marketing is a growing trend in terms of how visitors make their travel decisions e.g. trip advisor etc.
- Other businesses market the experience through Facebook – losing control of the messages.
- Interpretation using new technology – iPad/iPod/ Smart Phone Applications etc.
- Access to communications at the site.
- Clean Green Energy generation.
- Use of Research capacity in the area.
- Sales on line.