

Toowoomba: 2007

Visitor Profile & Satisfaction (VPS) Project
14/07/07 – 28/07/07

Base Report

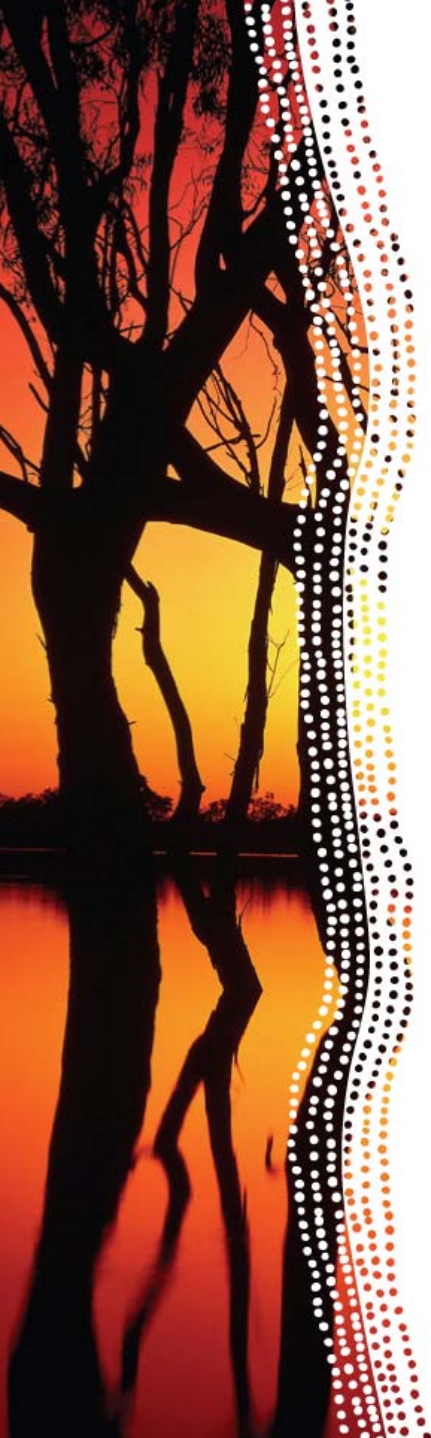




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VPS Program

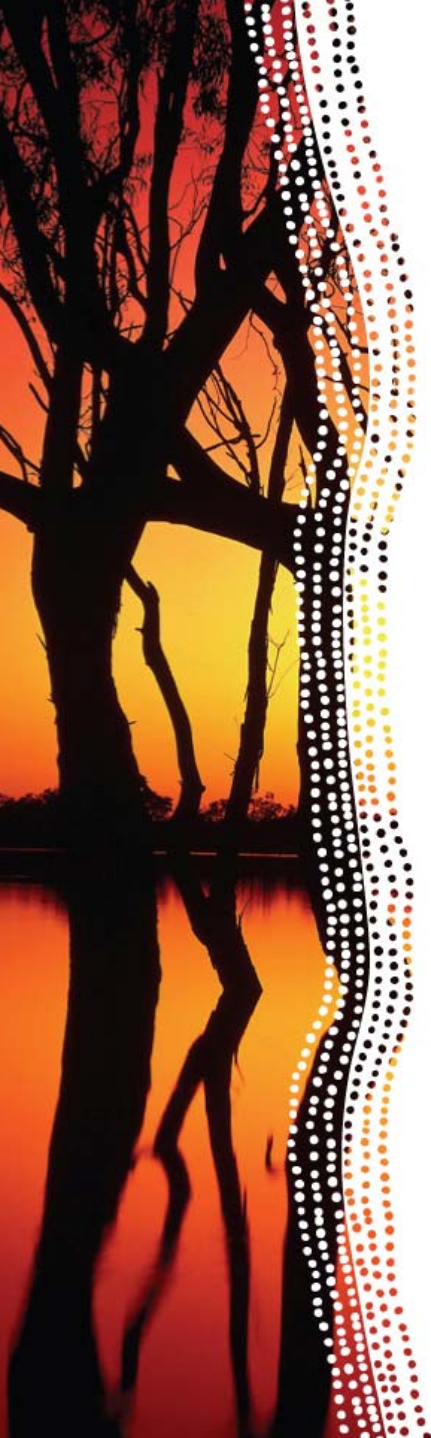


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VPS Program

- This project is part of the **Visitor Profile and Satisfaction (VPS)** Program, developed by TRA, in conjunction with ACNielsen, which offers a standard project model for destination-based tourism research.
- The overall objective of the VPS Program is to develop a comprehensive understanding of the profile, travel behaviours and satisfaction of visitors to participating destinations.
- The more specific research objectives of each project are to :
 - compile a visitor profile for the destination
 - identify aspects of visitor behaviour
 - measure visitor expectations and satisfaction
 - measure visitor expenditure
 - investigate visitor flows to other destinations visited during the trip
- This document is the **Base Report** and provides an overall summary of the survey results. For further analysis of the survey results, please refer to:
 - The set of **Excel tables** provided separately, which provide detailed tables for all survey questions. The **Appendix** provides some advice on the reading and interpretation of these tables; and
 - The **SPSS file** provided separately, which permits further analysis as required.

Executive Summary



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Executive Summary

What do visitors expect?

- Visitors expected the Darling Downs to have the following attributes:
 - “Quality time with partner / family / friends” (65%)
 - “Tour around and explore” (59%)
 - “Relaxation and rejuvenation” (56%)
 - “Opportunity for a rural experience” (45%)
 - “Chance to discover something new” (45%)

What are visitors experiencing?

- The top two reasons for choosing to visit the Darling Downs are:
 - Visit family there (22%)
 - Attend a specific event or exhibition (12%)
- The key activities undertaken by visitors to the Darling Downs are:
 - “Just walk or drive around/ general sightseeing” (64%)
 - “Go shopping” (54%)
 - “Eat out” (51%)
 - “Visit Picnic Point” (35%)
 - “Visit friends or family” (32%)
 - “Tourist drive” (32%)
 - “Visit botanic gardens” (27%)

Executive Summary

Were they satisfied with their experience?

- In terms of overall satisfaction, 82% were satisfied with their visit to the Darling Downs
- Expectations were somewhat better or much better than expected in the case of:
 - “Tour around and explore” (59%)
 - “Something the kids would enjoy” (55%)
 - “Experience arts or culture” (53%)
 - “A place to spend quality time with partner/family/friends” (53%)
 - “A romantic getaway” (53%)
- Friendliness of locals, local atmosphere, personal safety and security, value for money, public amenities and variety of things to see were the key strengths of the Darling Downs. Visitors were more likely to rate these attributes as important and be satisfied with the attributes.

Executive Summary

What is the visitors' profile?

- 88% of visitors to the Darling Downs are overnight visitors and 12% are day visitors.
- 79% of domestic visitors are from Queensland, 8% from NSW, 8% Victoria, 3% South Australia and 1% Western Australia, and Tasmania respectively.
- 22% of visitors to the Darling Downs visited friends or relatives while 47% visited for holiday and leisure purposes.
- Visitors were more likely to have travelled with their partner/spouse (47%) and used private transport/their own vehicle (84%) in order to reach the Darling Downs.
- Bookings most commonly made before the trip were with accommodation providers (26%), however most people (41%) did not make a booking prior to their trip to the Darling Downs region.
- 42% of all bookings were made via the Internet.
- The average length of stay for all visitors was 2.8 nights in the Darling Downs (total trip length of 14.1 nights).

Executive Summary

How did the visitors travel in and around the Darling Downs region?

- People visiting the Darling Downs were also likely to visit Brisbane (38%), Esk or Crows Nest (15% respectively).
- Common stopping points before getting to the Darling Downs included Brisbane (27%), Roma (6%) and Warwick (6%).
- Common stopping points after going to the Darling Downs included Brisbane (12%) and Esk (10%).

How did the visitors decide to visit?

- The majority of visitors (47%) made the decision to visit the Darling Downs well in advance of the trip (27% 1-3 months before, 20% 3months or more).
- 82% of visitors did not consider another location as an alternative to the Darling Downs .
- Almost half of visitors (45%) relied on prior experiences for information, while 35% used the internet and 26% asked friends or relatives.

Will they visit again?

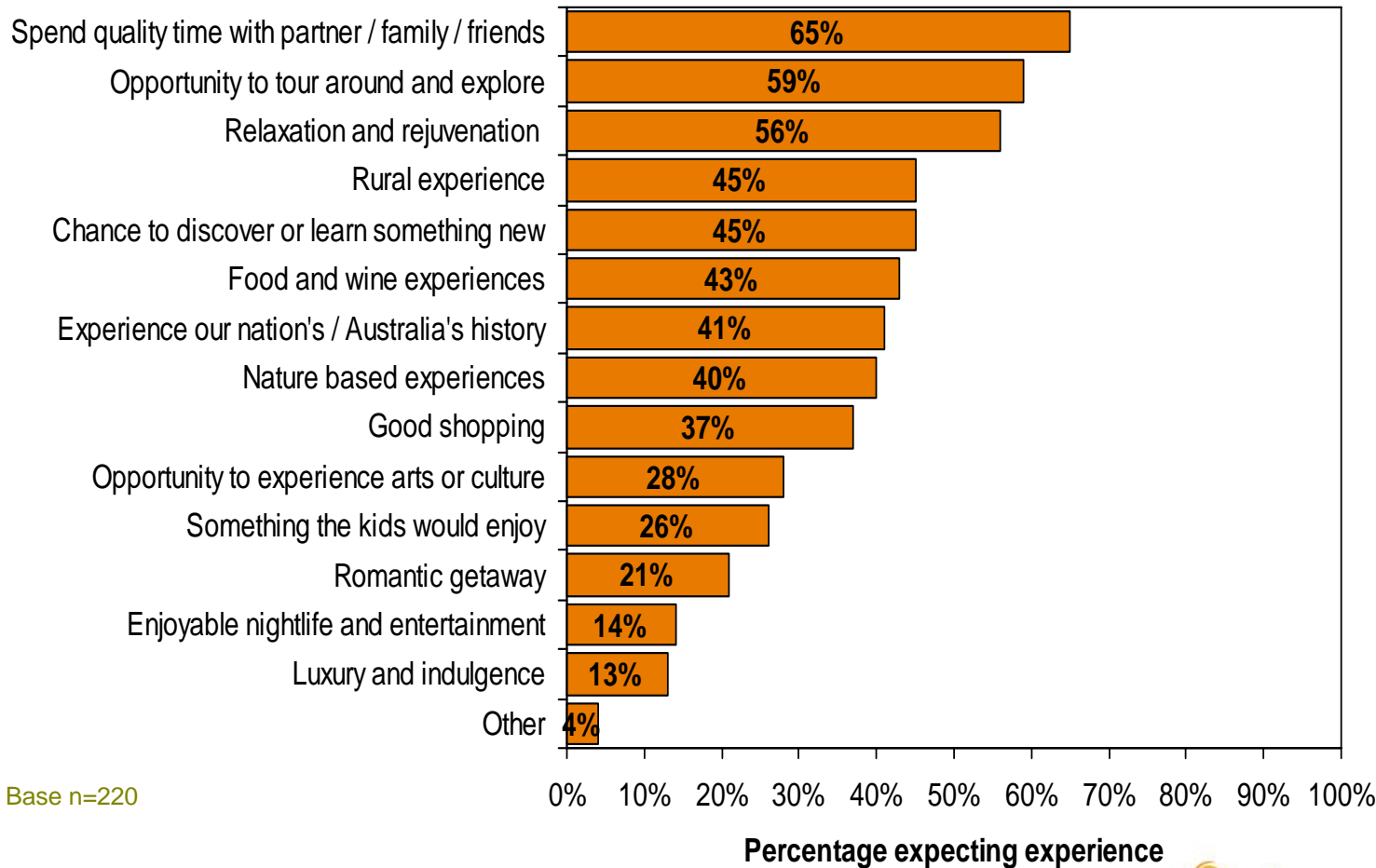
- 63% of visitors stated they would be likely to visit again in the next 12 months.
- 78% of visitors said they were likely to recommend the Darling Downs to others as a destination to visit.

What do visitors expect?

- *Experiences expected at destination*
- *Whether expectations satisfaction*
- *Activities*

Experiences Expected

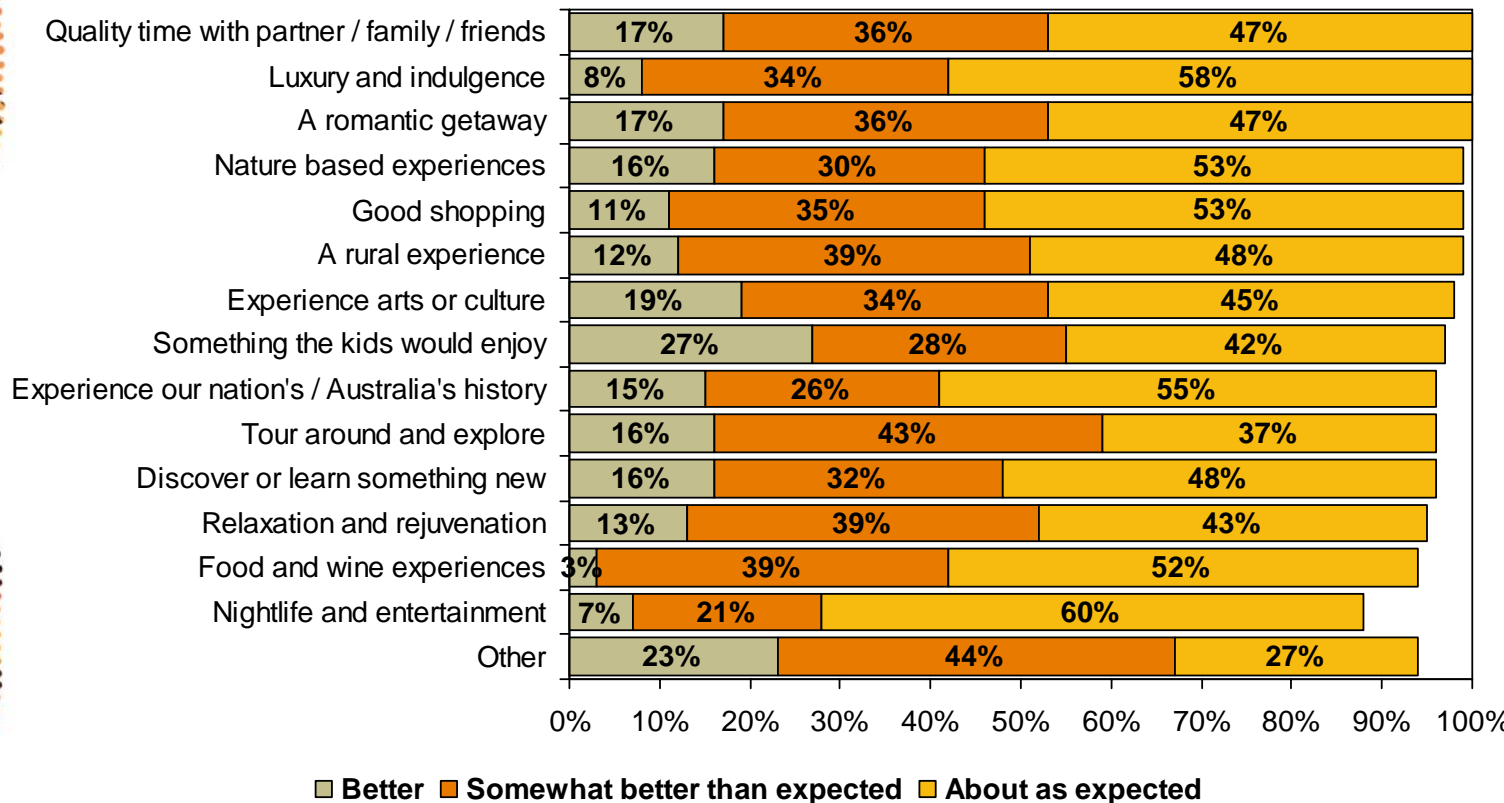
"Which, if any, of the experiences listed below did you expect the Darling Downs to offer?"



Base n=220

Whether Expectations Met

“Which, if any, of the experiences listed below did you expect the Darling Downs to offer? If you answer YES, please indicate how well the region met this expectation.”

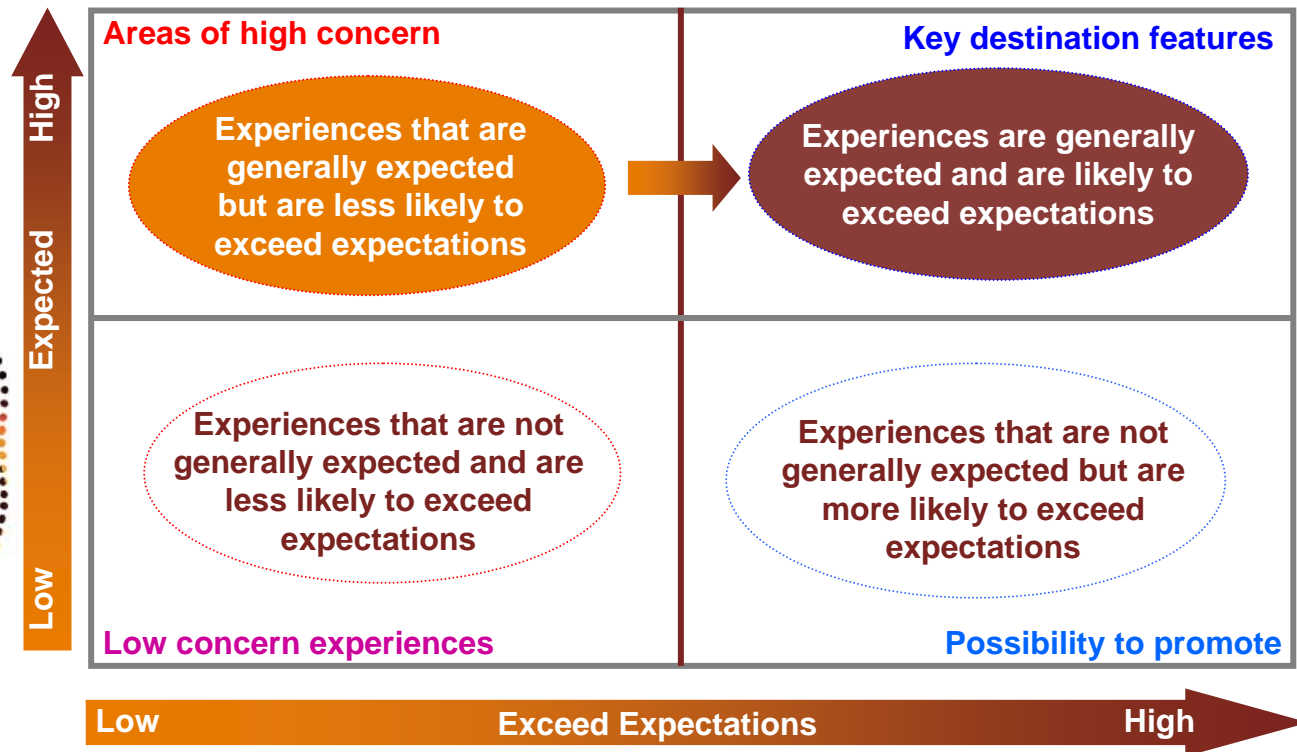


Base includes only visitors who expected experience

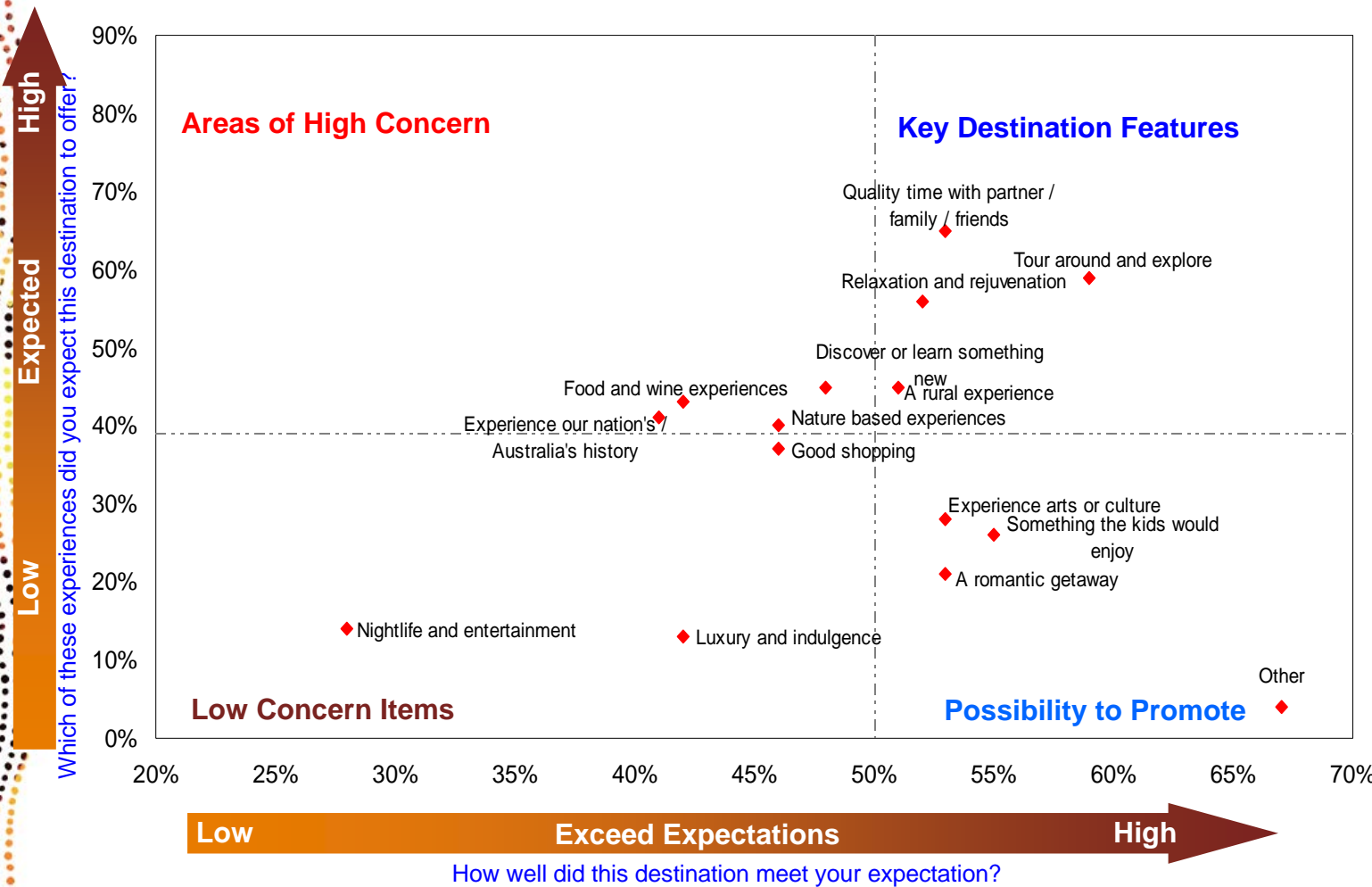
Interpretation of Expectations & Delivery

The following chart compares the incidence of visitors expecting an experience with the incidence of having that expectation exceeded.

The four quadrants detailed are:



Expectations and Delivery

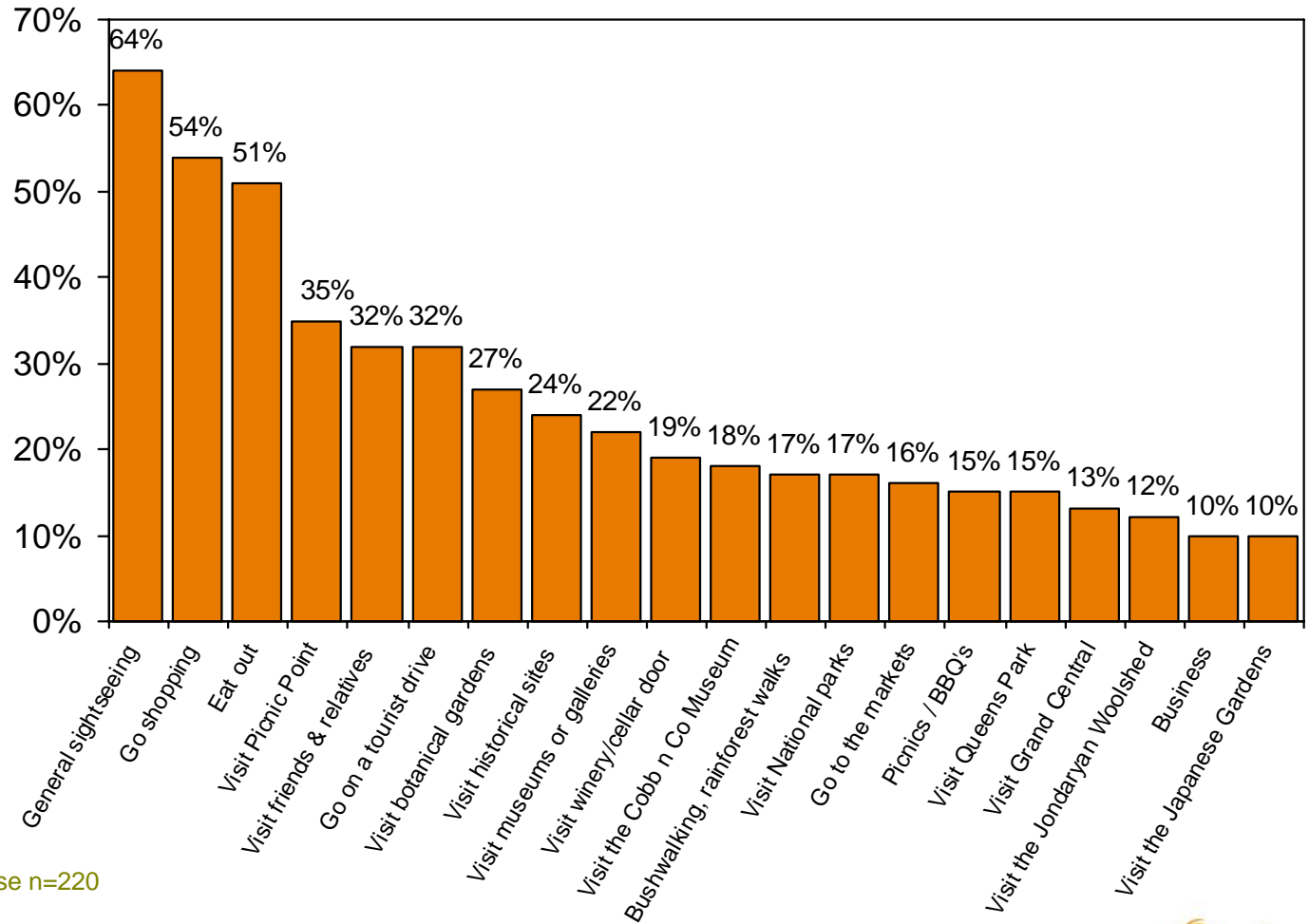


*Whether expectations exceeded is only asked where experience is expected

Activities

“On this trip to the Darling Downs, which of the following activities did you undertake?”

All activities above 5% participation



Base n=220

Were they satisfied?

- ***Satisfaction, Revisitation and Recommendation***
- ***Trip Aspects***

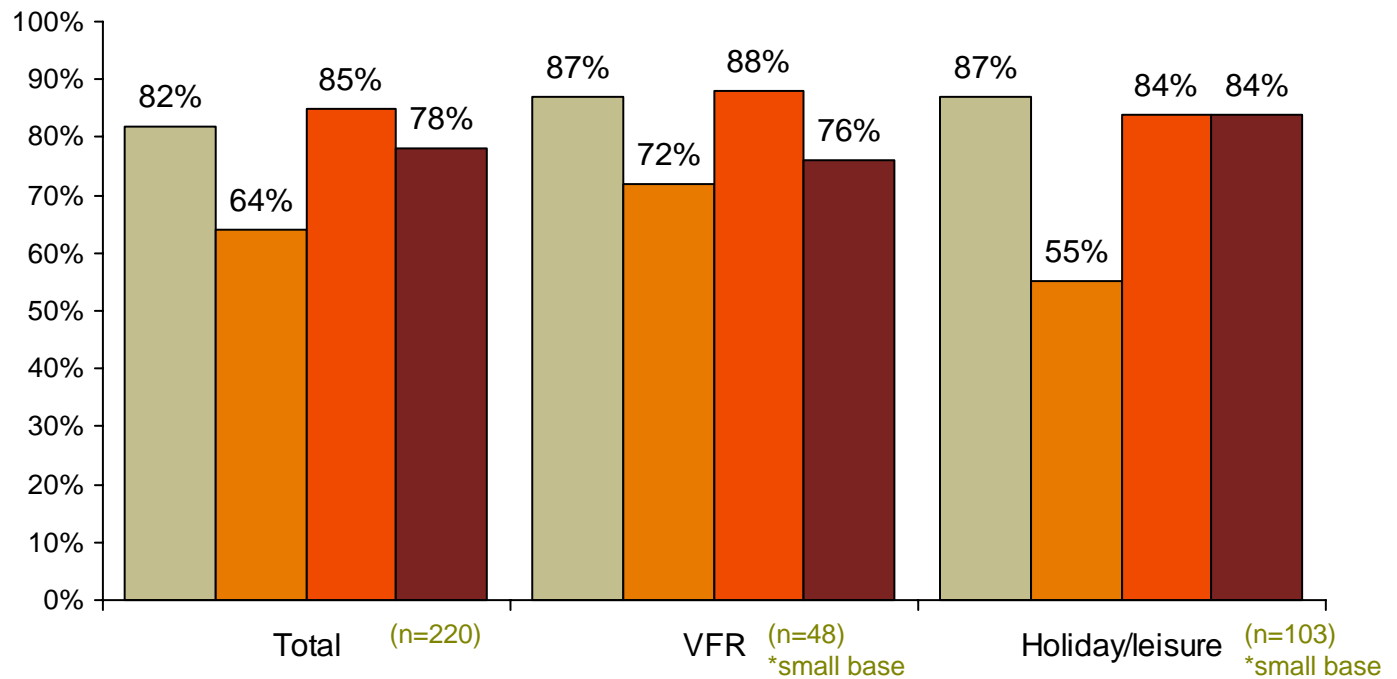
Satisfaction, Revisitation, Recommendation

“Overall, how satisfied or dissatisfied were you with your experience at the Darling Downs?”

“How likely are you to return to the Darling Downs in the next 12 months?”

“How likely are you to return to the Darling Downs in the next 3 years?”

“How likely are you to recommend the Darling Downs to other people as a destination to visit?”



- Satisfied:** (Net 'very/fairly')
- Revisit in 1yr:** (Net 'very/fairly likely')
- Revisit in 3yrs:** (Net 'very/fairly likely')
- Recommend:** (Net 'very/fairly likely')

Base n=220

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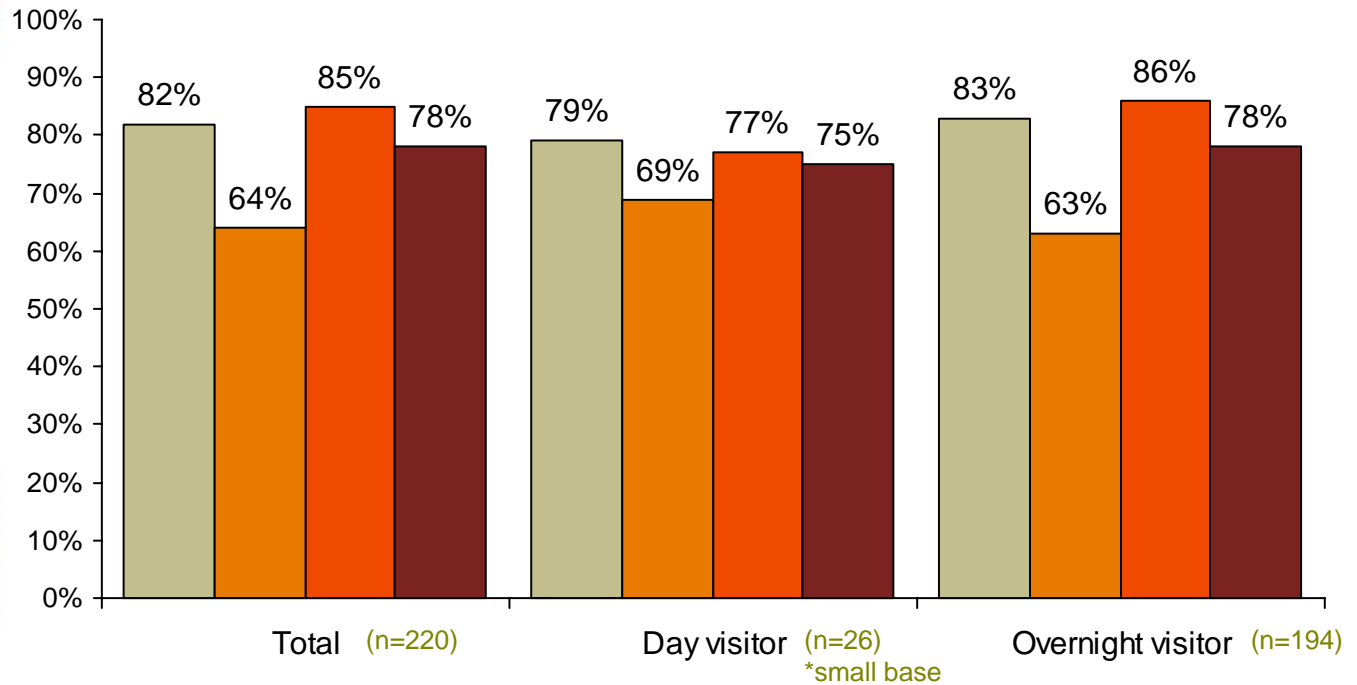
Satisfaction, Revisitation, Recommendation





"Overall, how satisfied or dissatisfied were you with your experience at the Darling Downs?"

"How likely are you to return to the Darling Downs in the next 12 months?"

"How likely are you to return to the Darling Downs in the next 3 years?"

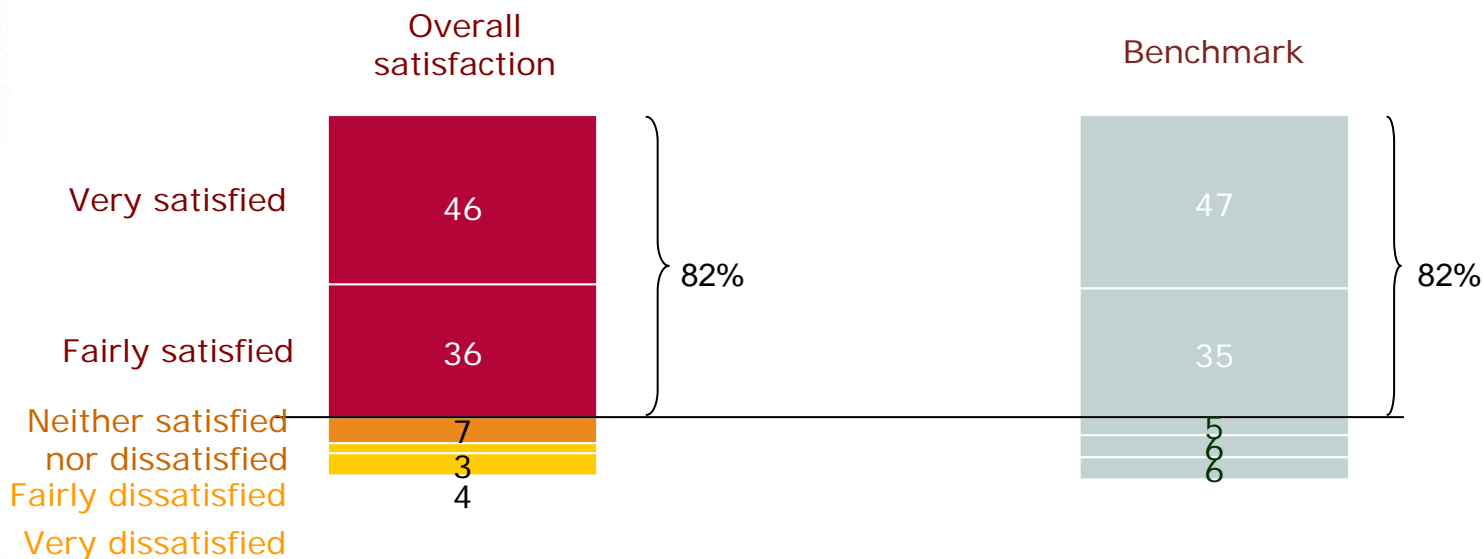
"How likely are you to recommend the Darling Downs to other people as a destination to visit?"



-  **Satisfied:** (Net 'very/fairly')
-  **Revisit in 1yr:** (Net 'very/fairly likely')
-  **Revisit in 3yrs:** (Net 'very/fairly likely')
-  **Recommend:** (Net 'very/fairly likely')

Overall satisfaction with destination

“Overall, how satisfied or dissatisfied were you with your experience at the Darling Downs?”



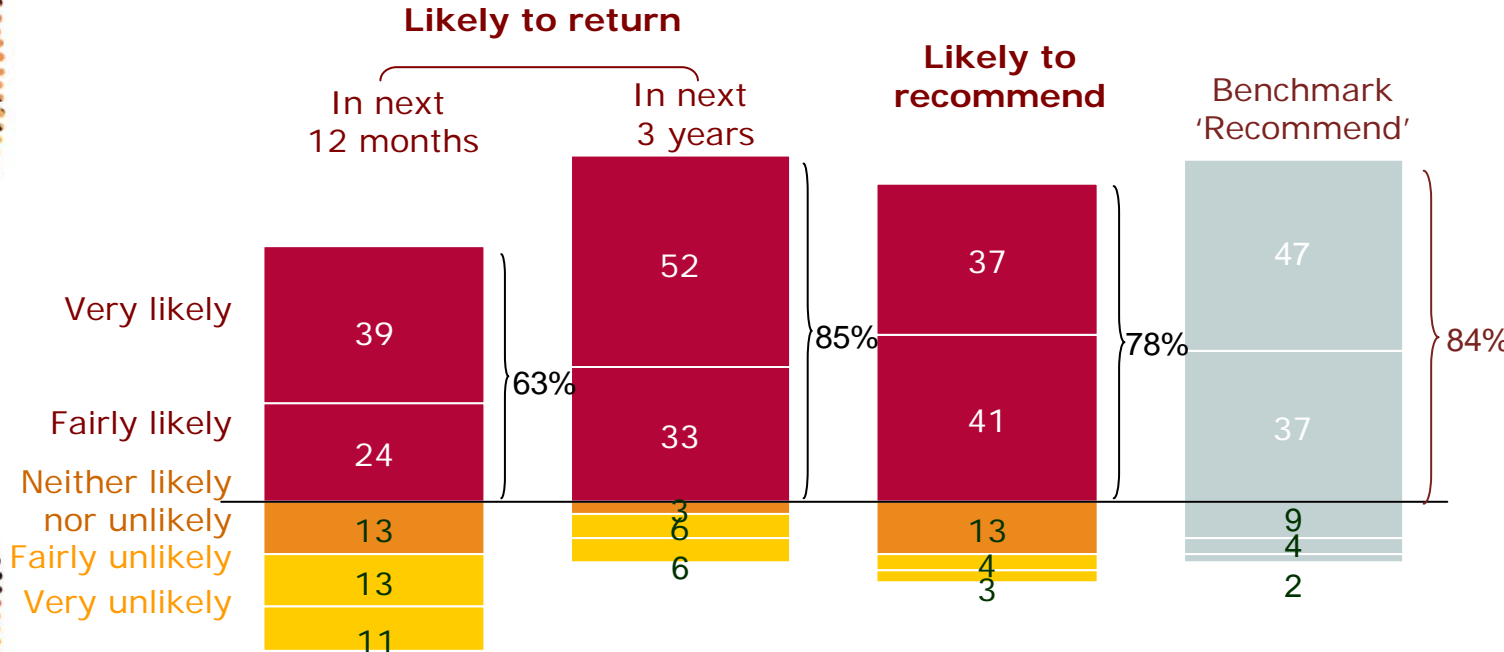
Base n=220

Benchmarks are the average of all (unweighted) VPS destination projects with at least 30 respondents. Only most recent wave for each destination is included.

Likely to 'revisit' and 'recommend' destination

"How likely are you to return to the Darling Downs in the next 12 months/next 3 years?"

"How likely are you to recommend the Darling Downs to other people as a destination to visit?"



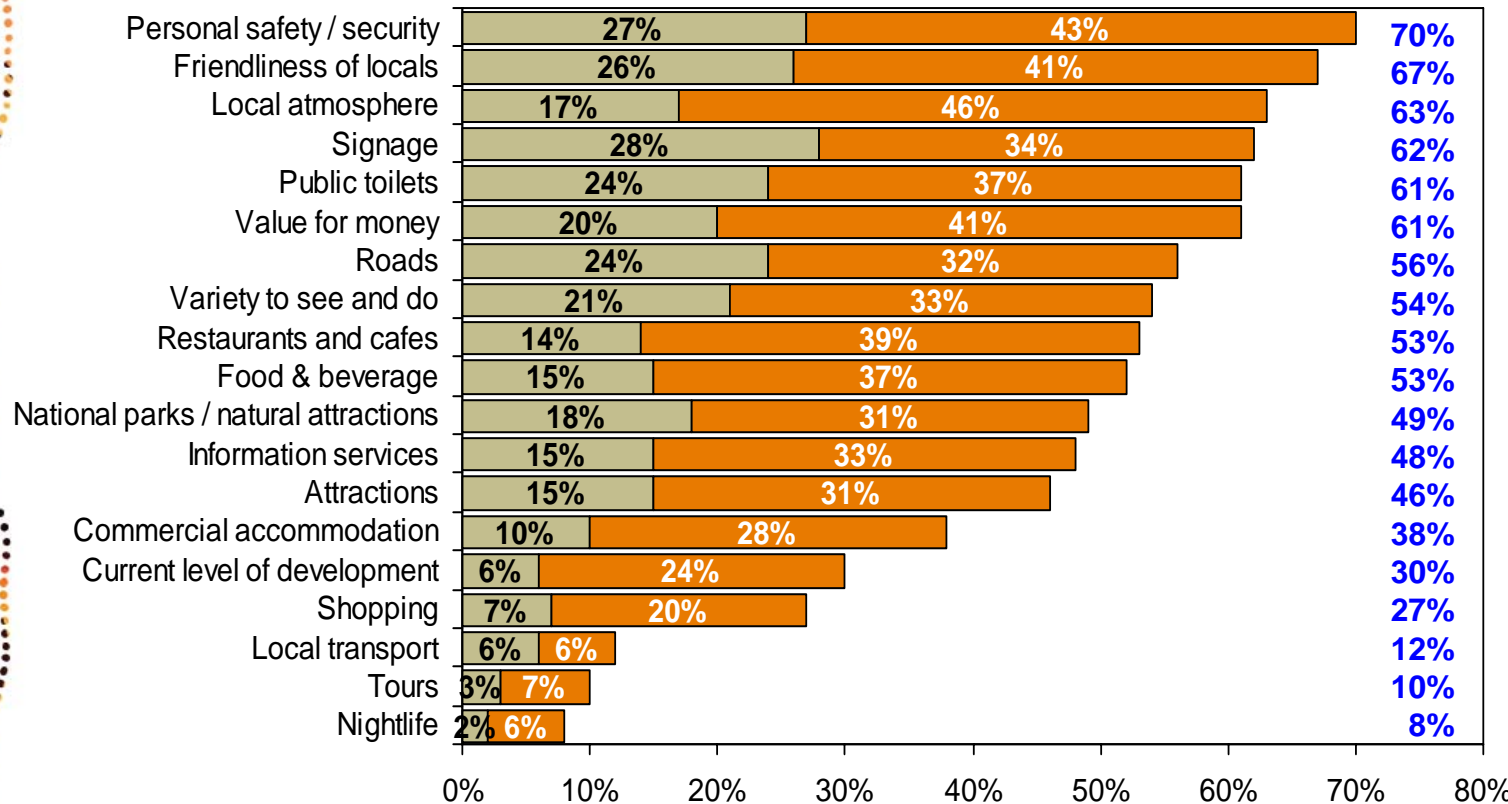
Base n=220

Benchmarks are the average of all (unweighted) VPS destination projects with at least 30 respondents. Only most recent wave for each destination is included.

Importance of Trip Aspects

“Again, thinking about your most recent trip to the Darling Downs, how important or unimportant was ...”

(Net) Important



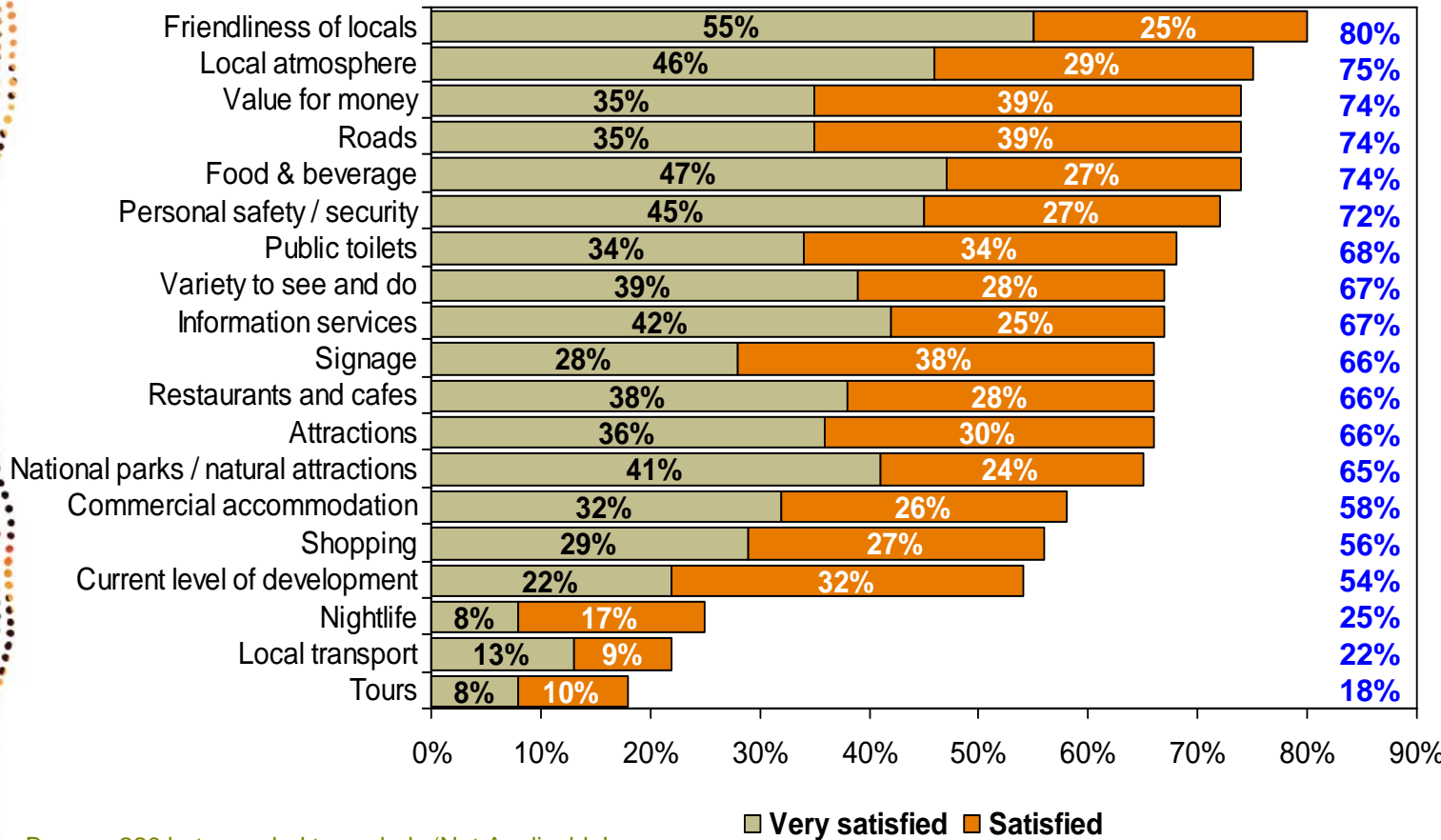
Base n=220 Note: Net values are rounded

Very Important Important

Satisfaction with Trip Aspects

“And how satisfied or dissatisfied were you with.... ”

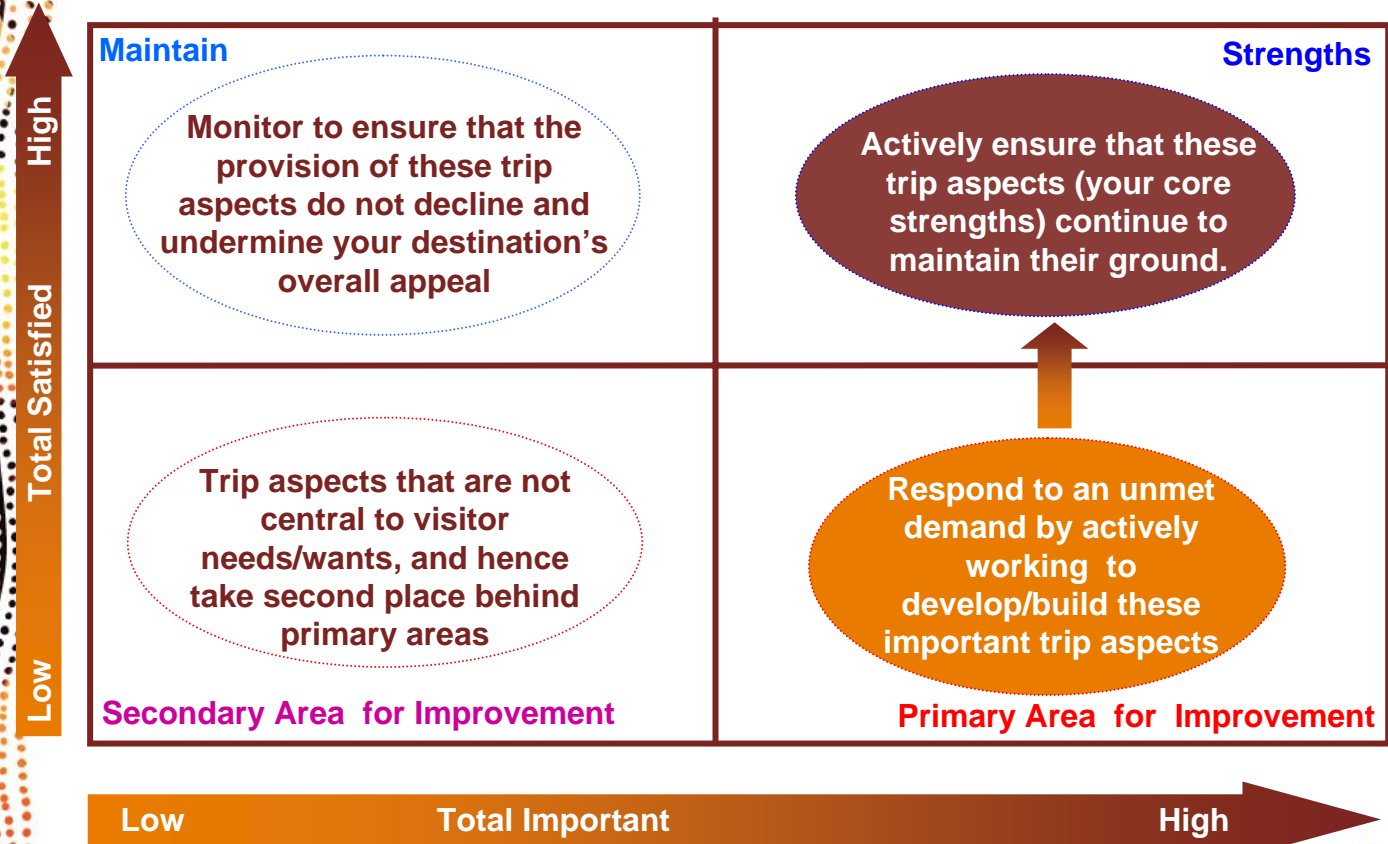
(Net) Satisfied



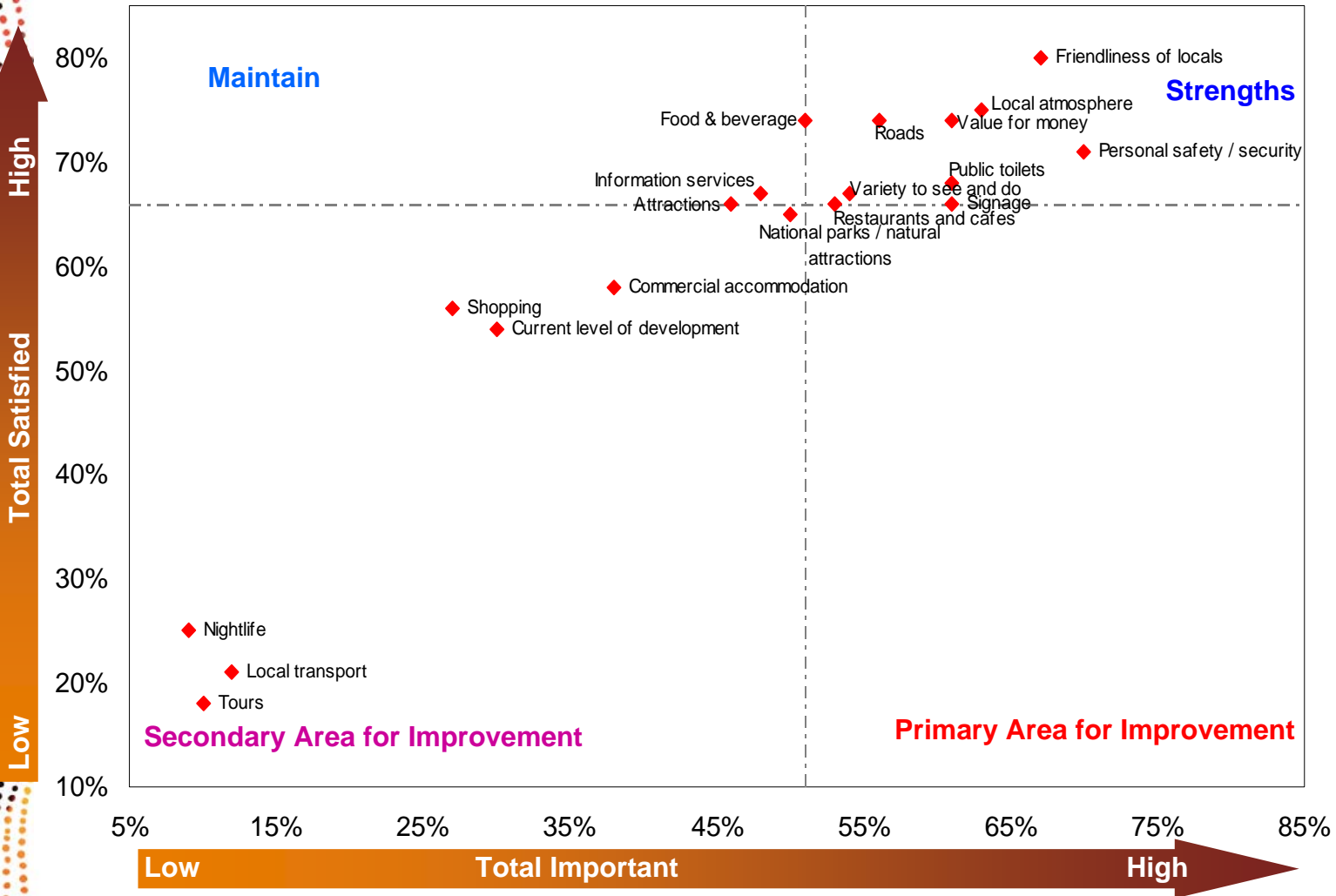
Base n=220 but rescaled to exclude 'Not Applicable'

Note: Net values are rounded

Interpretation of Importance vs Satisfaction



Importance versus Satisfaction



*Satisfaction rescaled to exclude 'Not Applicable'

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Where did they go?

- *Towns stopped at*
- *Time spent in towns*

Towns Stopped At

“Please select on the following map all the towns that you visited, only selecting those places you actually stopped at. Please remember to include the location where you were recruited.”

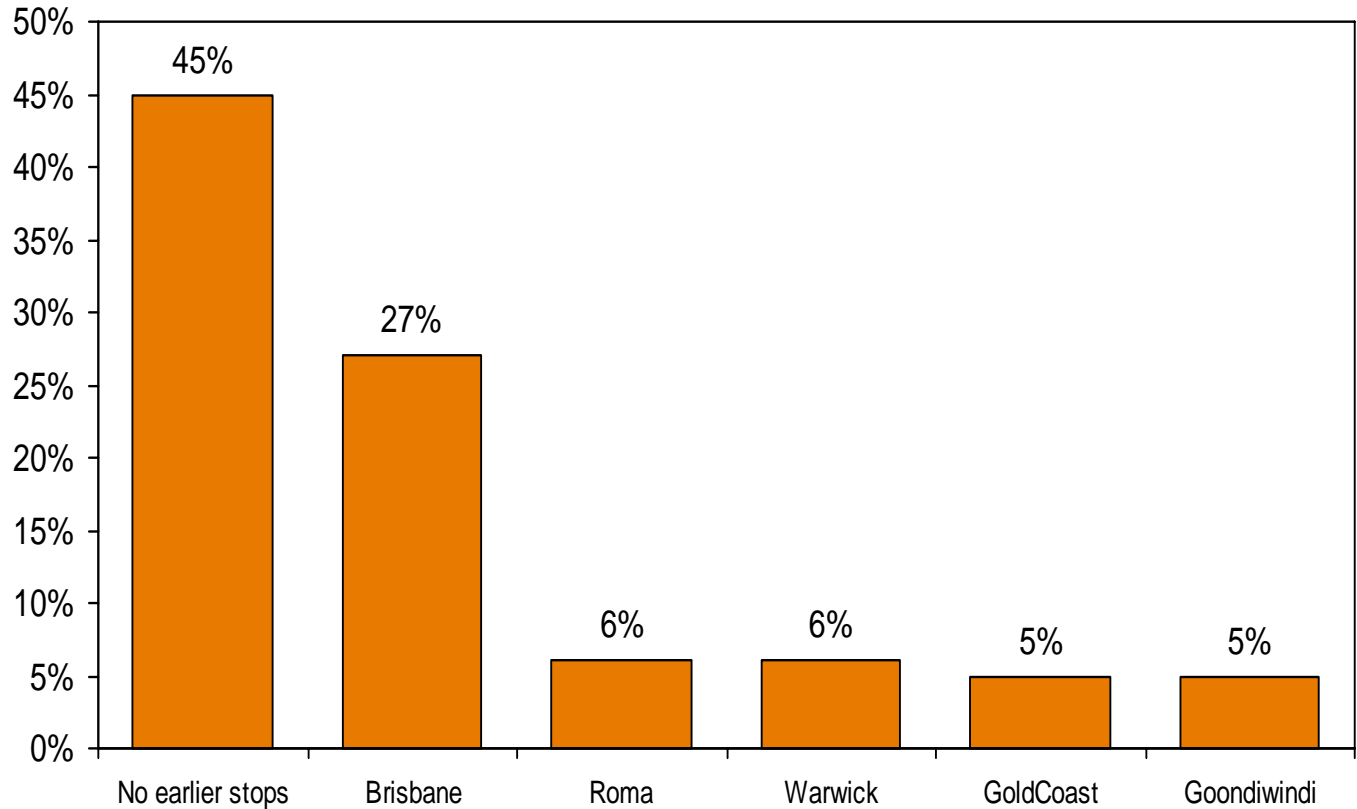


The number in each circle (and the size of circle) refers to the percentage of visitors that stopped at that place.

NB: The Darling Downs region includes Toowoomba, Crows Nest and Dalby

Towns Stopped at Before Darling Downs

"Please indicate the order in which you visited each town by placing a '1' next to the first town you visited, a '2' next to the second town you visited, and so on."



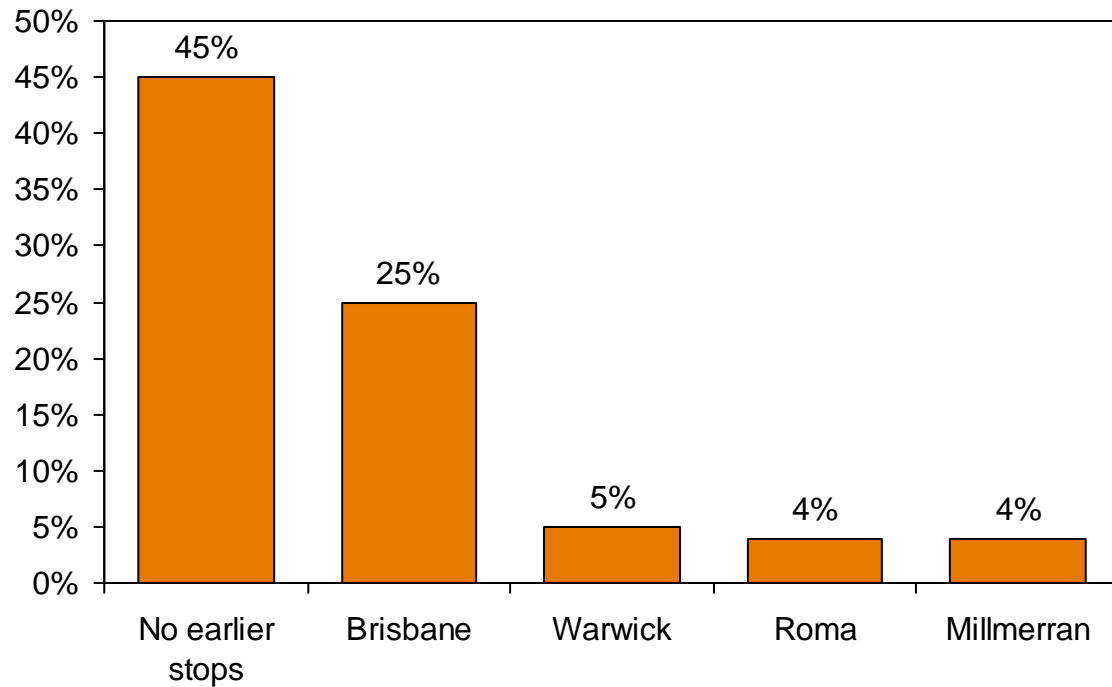
Top Towns visited before the Darling Downs

Base n=220

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Towns Stopped at Immediately Before Darling Downs

"Please indicate the order in which you visited each town by placing a '1' next to the first town you visited, a '2' next to the second town you visited, and so on."



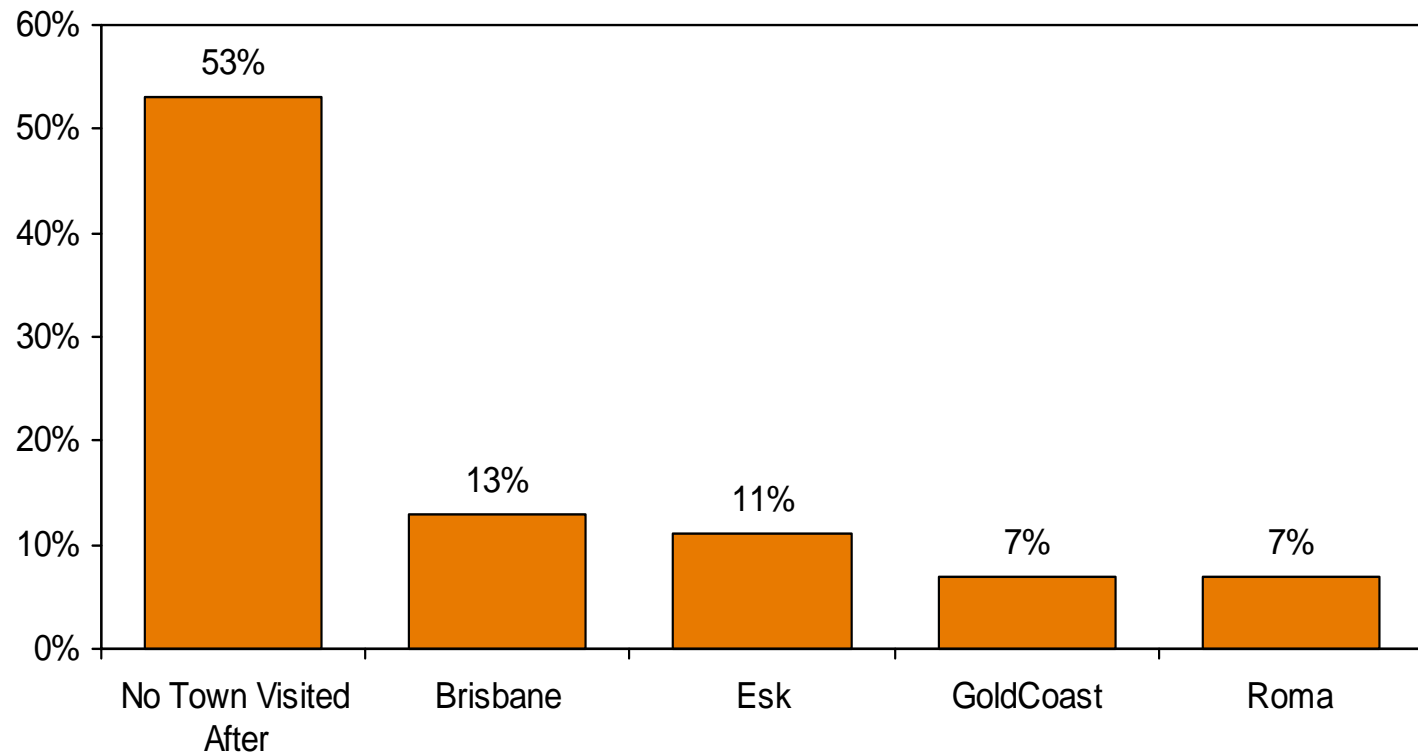
Top Towns visited immediately before the Darling Downs

Base n=220

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Towns Stopped at After Darling Downs

"Please indicate the order in which you visited each town by placing a '1' next to the first town you visited, a '2' next to the second town you visited, and so on."



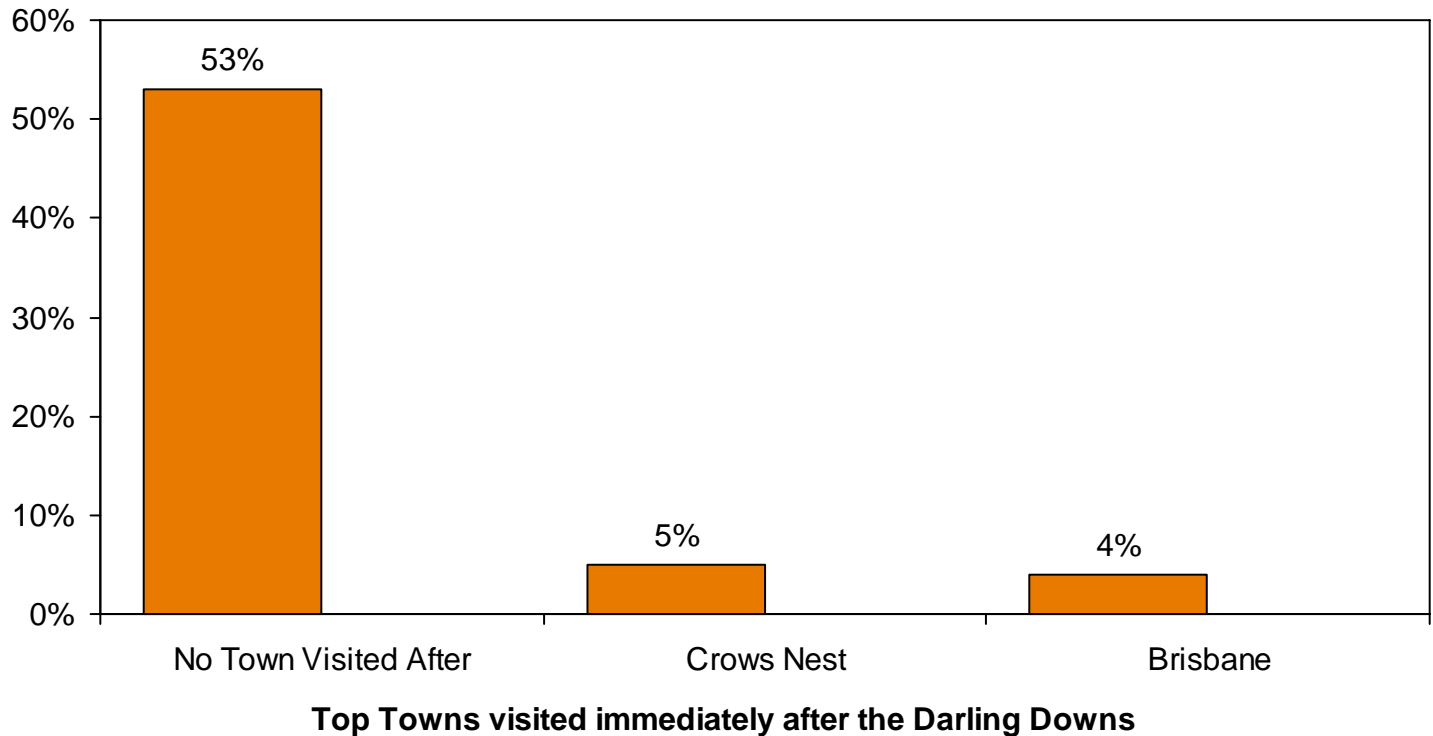
Top Towns visited after the Darling Downs

Base n=220

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Towns Stopped at Immediately After Darling Downs

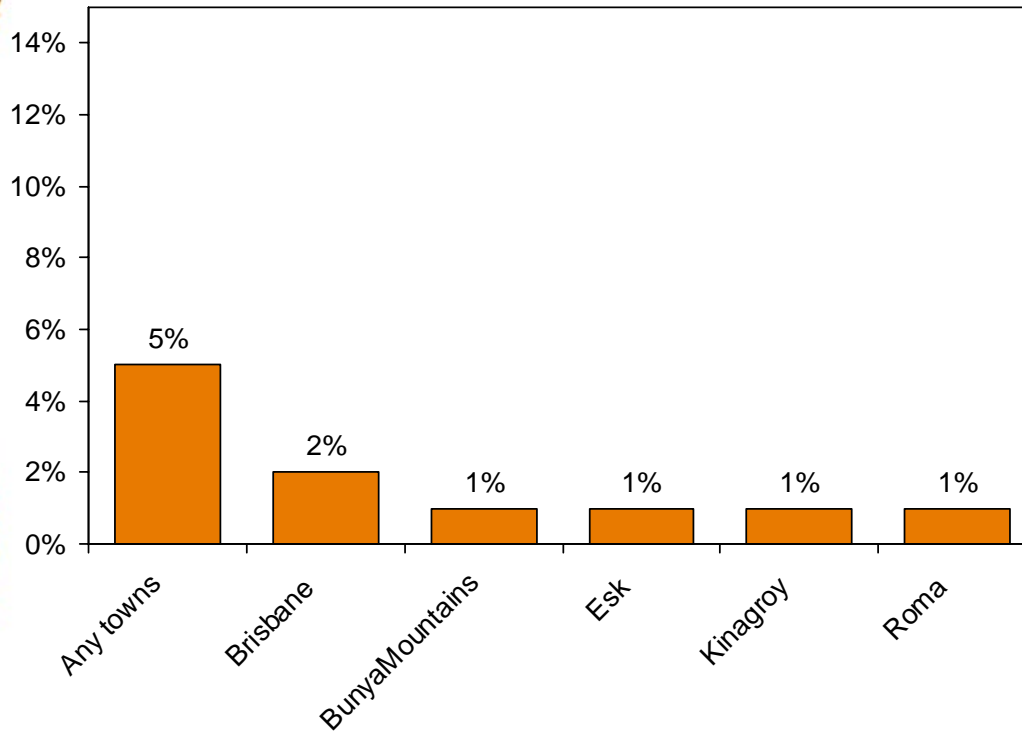
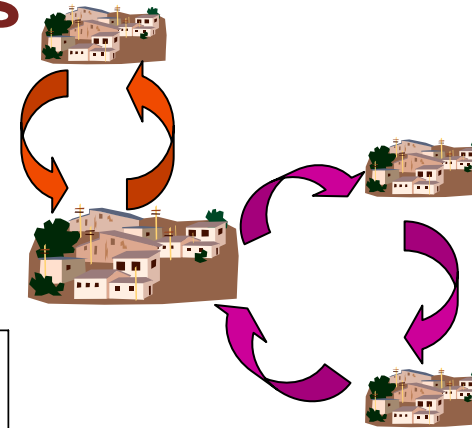
"Please indicate the order in which you visited each town by placing a '1' next to the first town you visited, a '2' next to the second town you visited, and so on. "



Base n=220

Side Trips from Darling Downs

"Please indicate the order in which you visited each town by placing a '1' next to the first town you visited, a '2' next to the second town you visited, and so on."



Towns visited between first and last visit to the Darling Downs

Base n=220

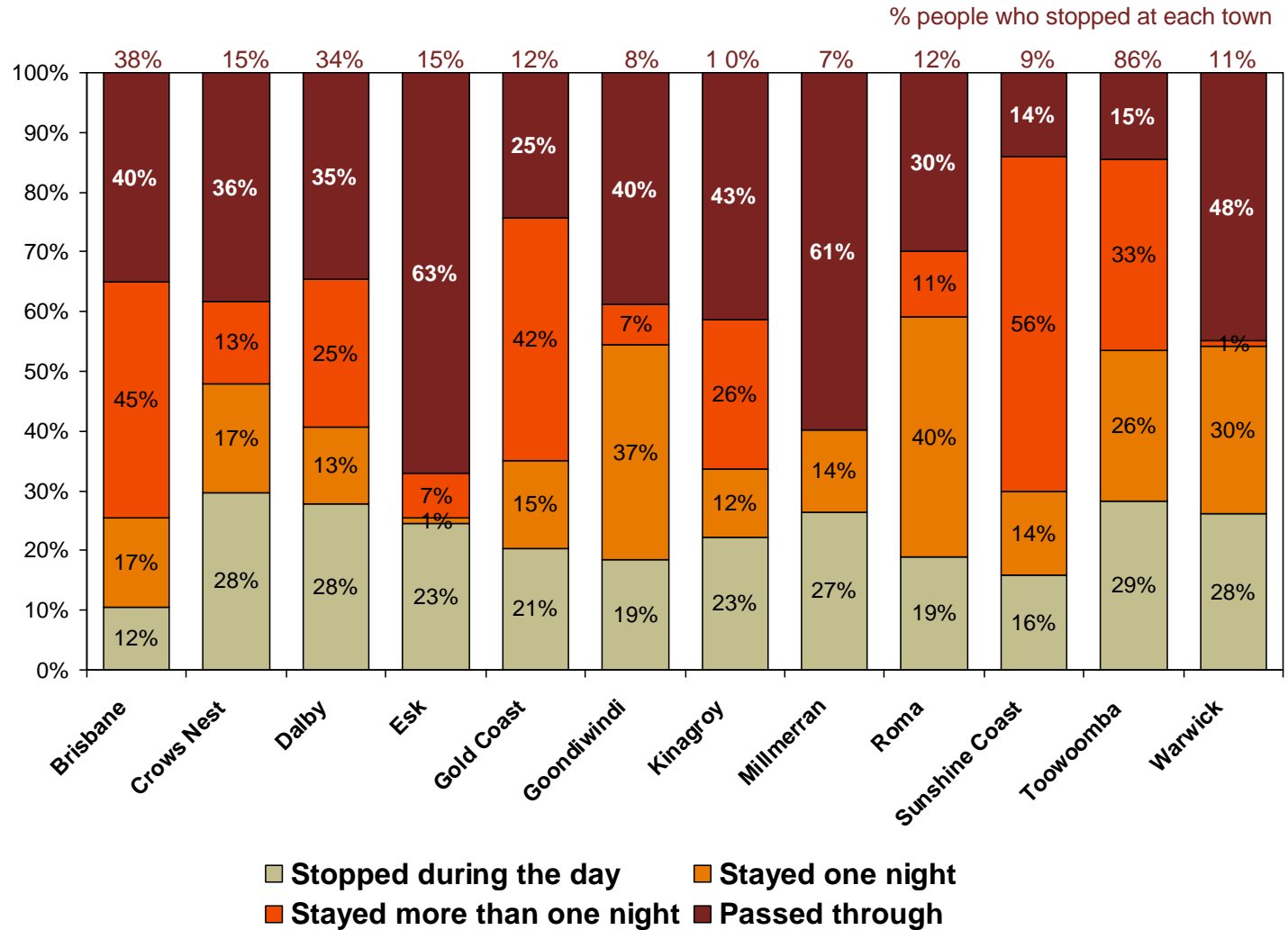
NB: 'Any Towns' represents the % of people who have taken a side trip.

The % for each town represents the number of side trips made to that town

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Time spent in towns

"How long did you spend at each town?"



Base varies by town visited (only includes towns visited by at least 25 respondents)

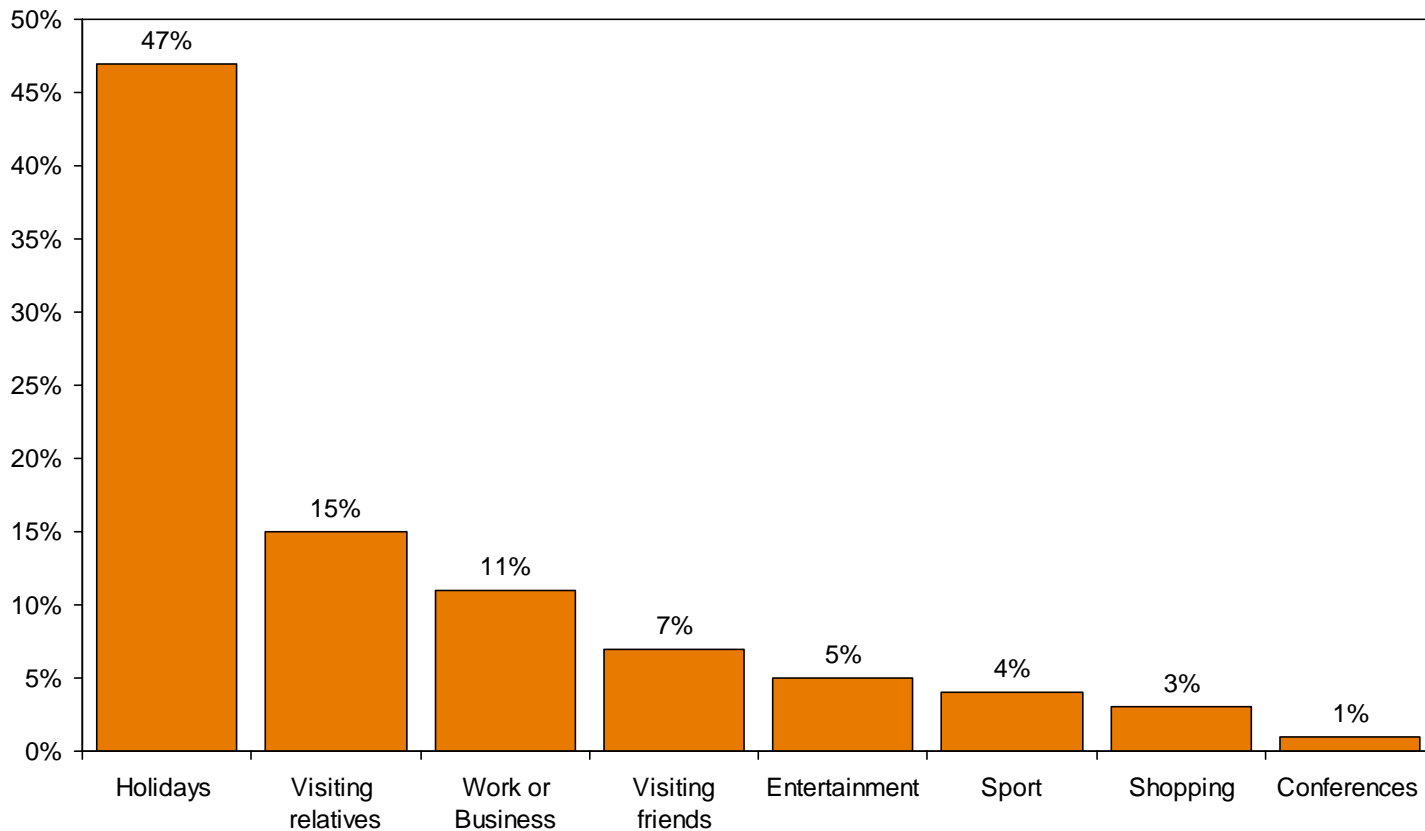
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How did the visitors decide to visit?

- *Purpose of trip*
- *Previous visits*
- *Planning the trip*
- *Alternative destinations*
- *Why chose destination*
- *Information sources*
- *Bookings*

Purpose of trip

“What was the main purpose of the trip?”

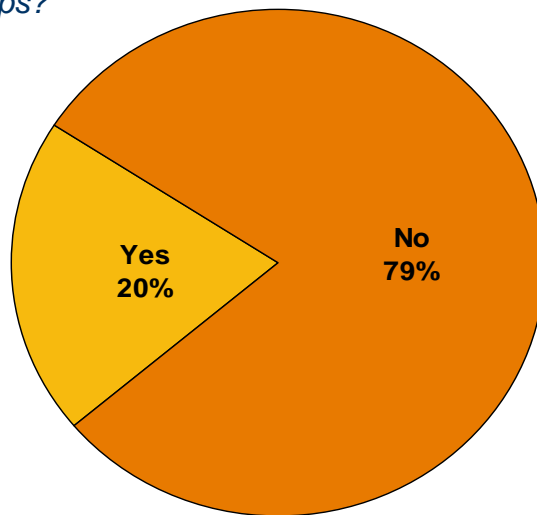


Base n=220

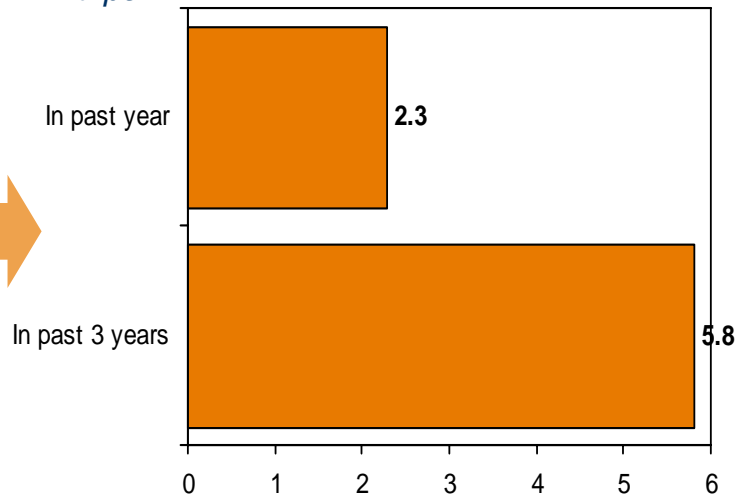
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Previous visits to destination

“Was this the first time you had visited the Darling Downs, including both day trips and overnight trips?”



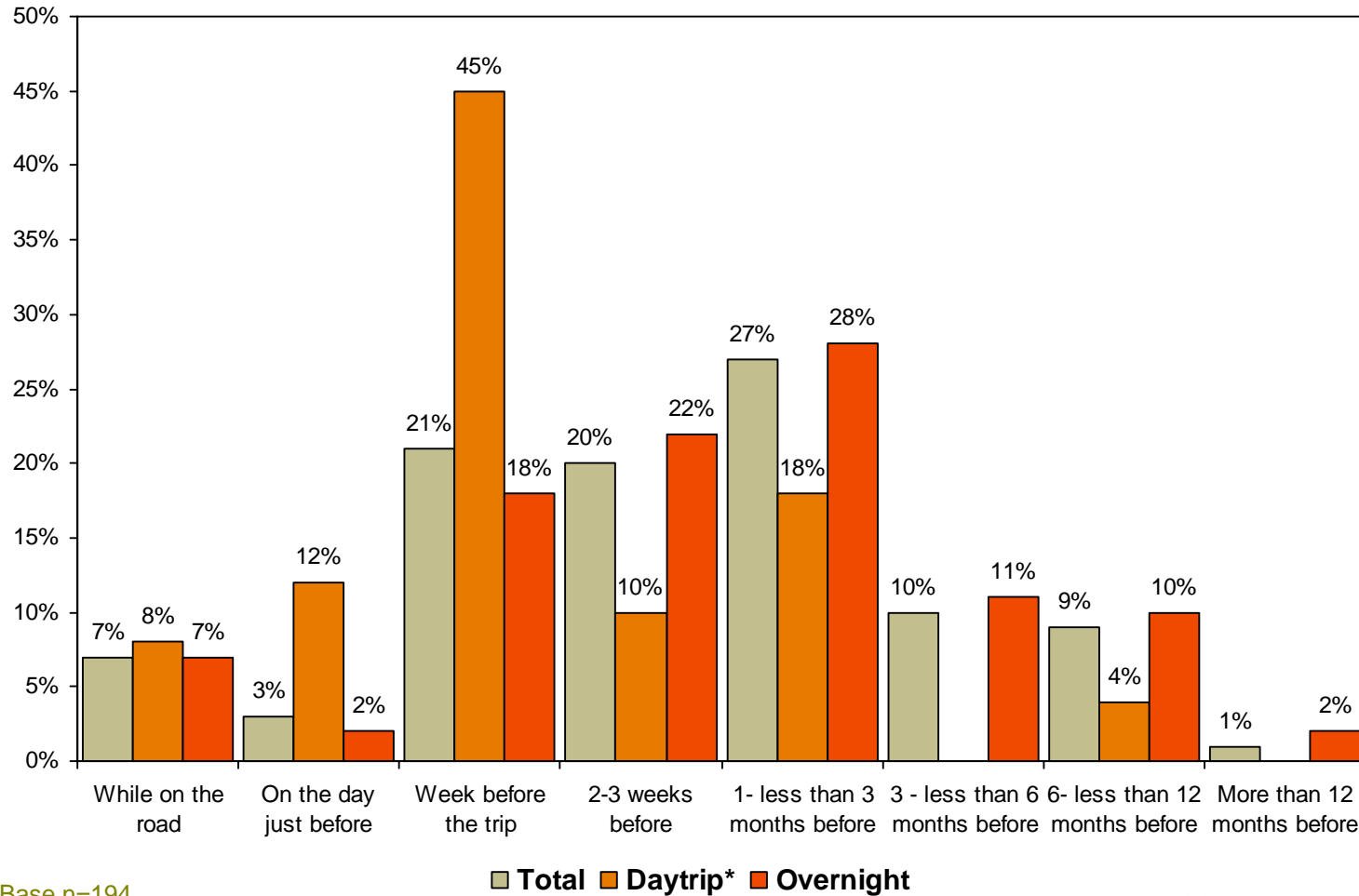
“How many times have you visited the Darling Downs, including both daytrips and overnight trips ”



Base n=220

Planning the trip

“When was the decision made to visit destination?”



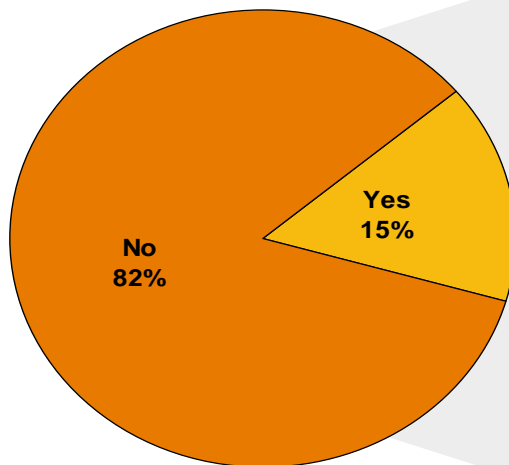
Base n=194

*Day n=25 (small base)

Overnight n=169

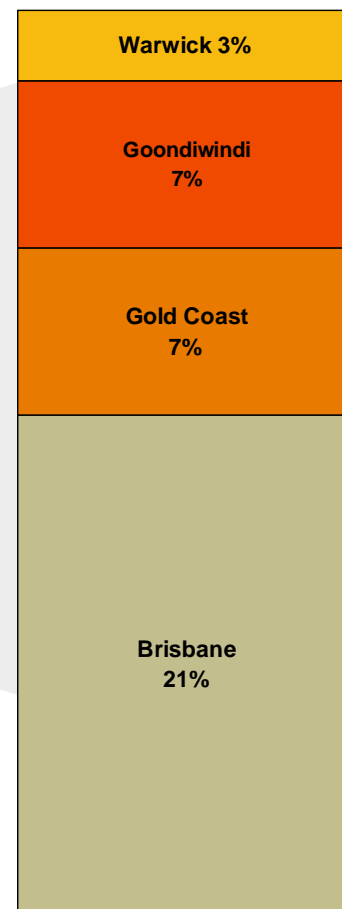
Alternative destinations considered (Excludes VFR)

"In planning this trip, was an alternative destination to the Darling Downs considered?"



Base n=194

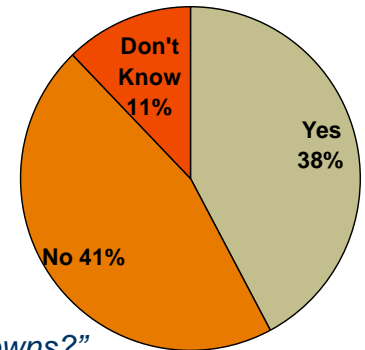
"Where else did you consider going?"



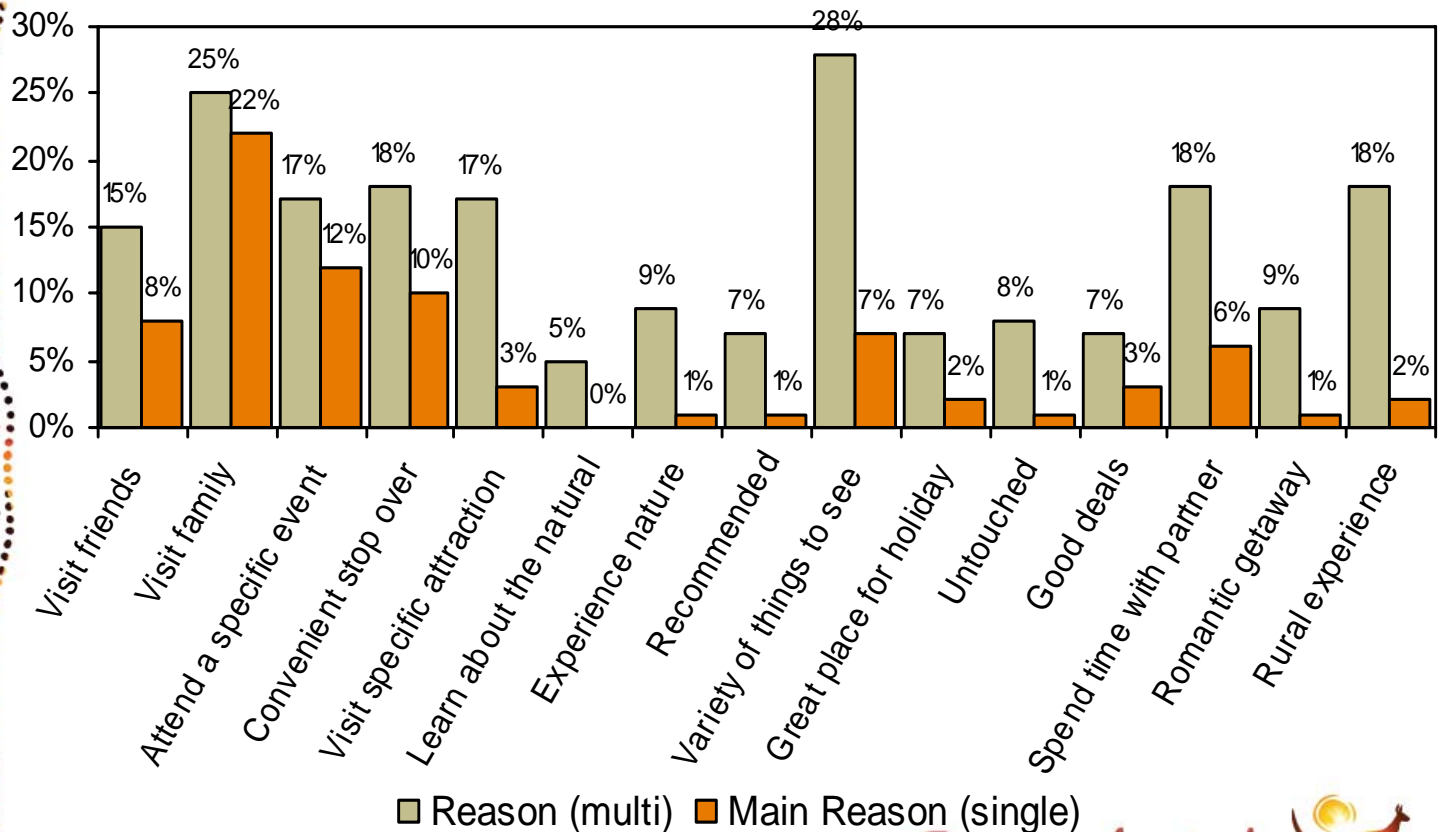
Why chose destination

“At the time of planning this trip, would you have gone to the Darling Downs for this trip if your friends or relatives weren’t there?”

Base: n=71 (Visiting friends or relatives)



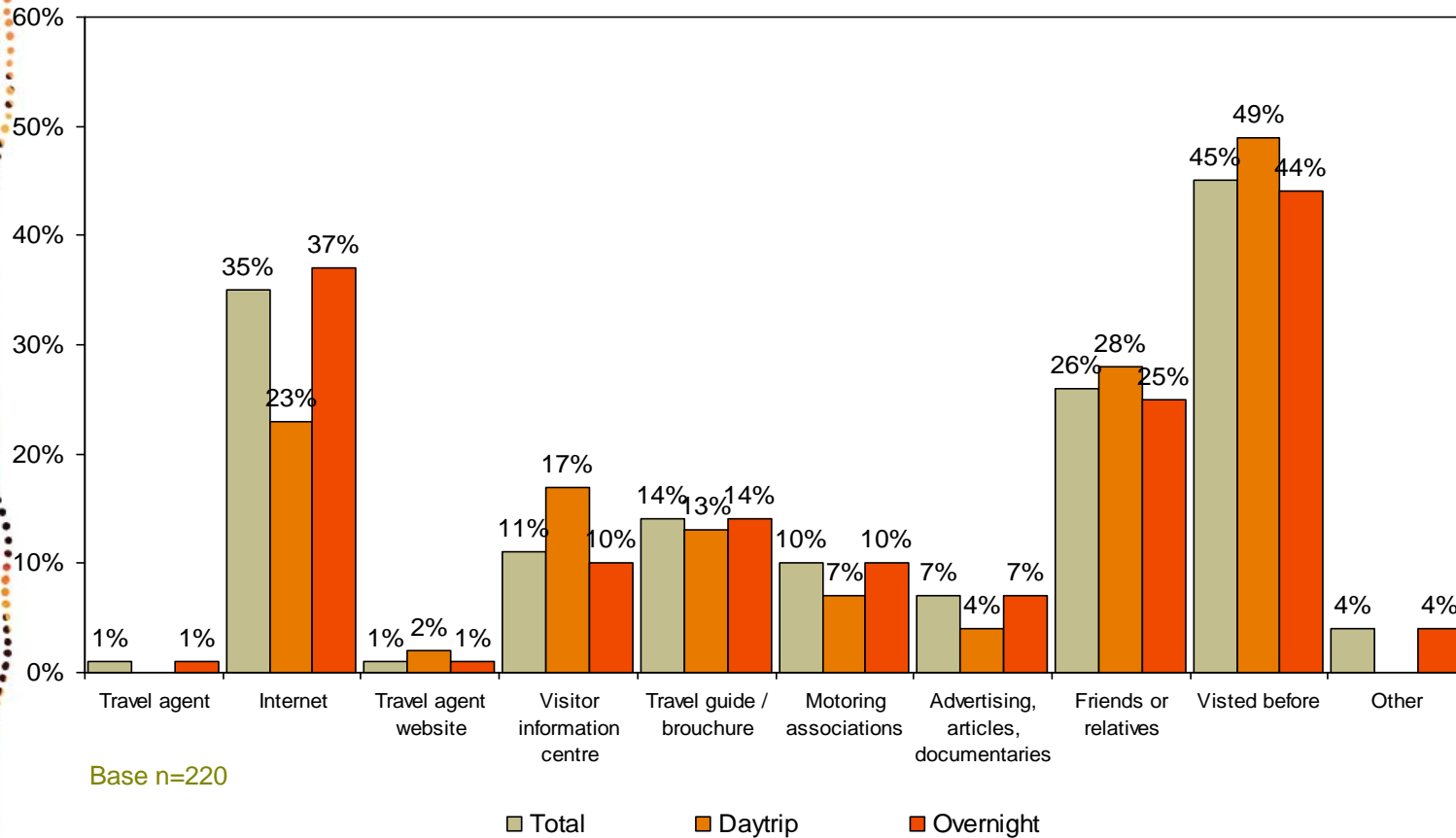
“Which of the following was the most important in choosing the Darling Downs?”



Base n=194

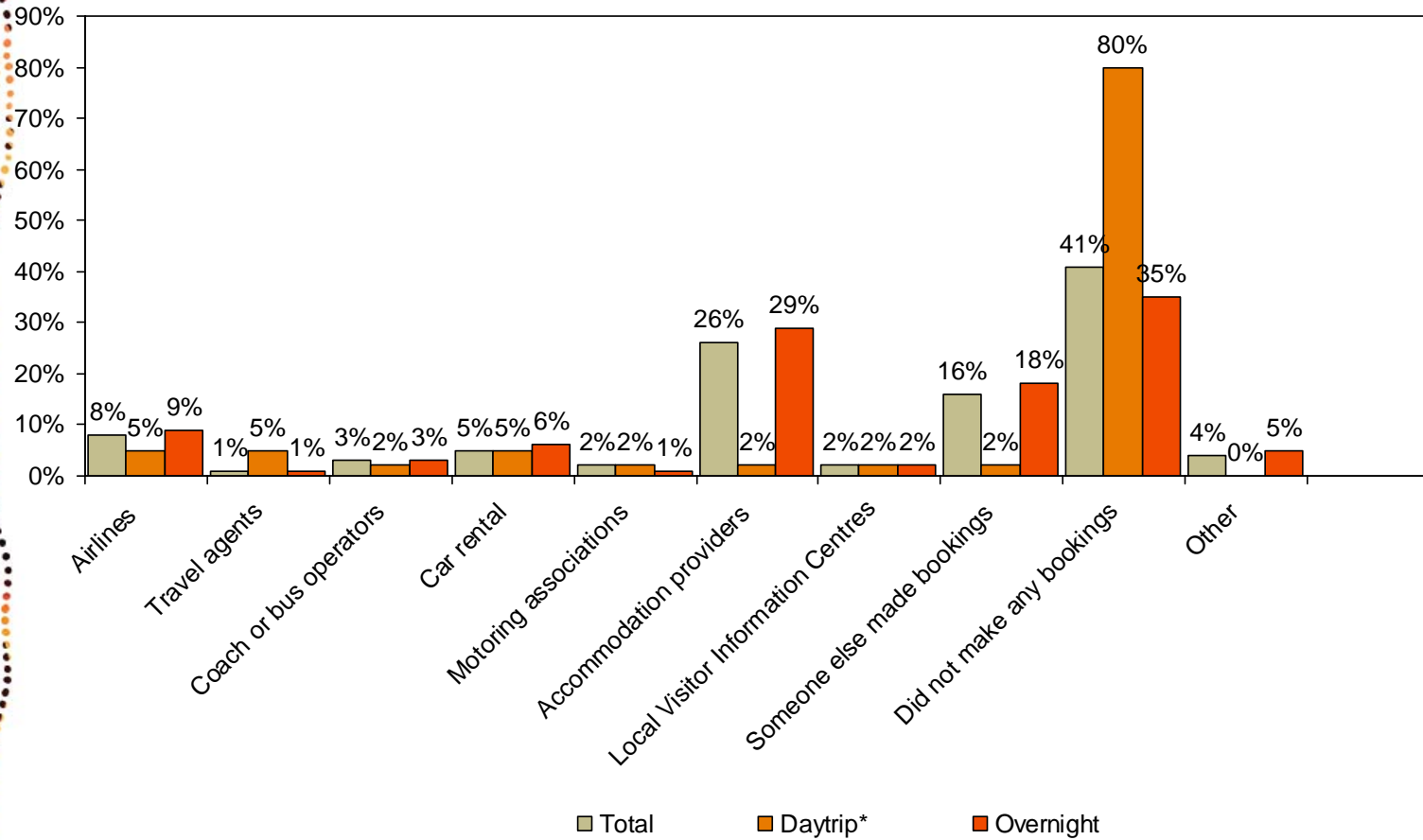
Information sources

“Before leaving home, which of the following information sources did you use to obtain information for this trip to?”



Bookings made

“Prior to your trip, did you yourself make any bookings for the trip with...?”



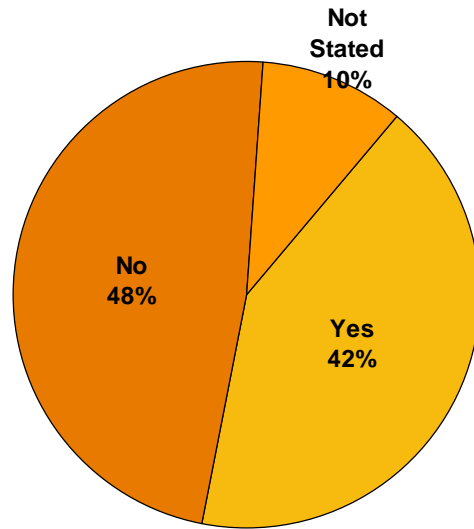
Base n=220

*Day n=26 (small base)

Overnight n=194

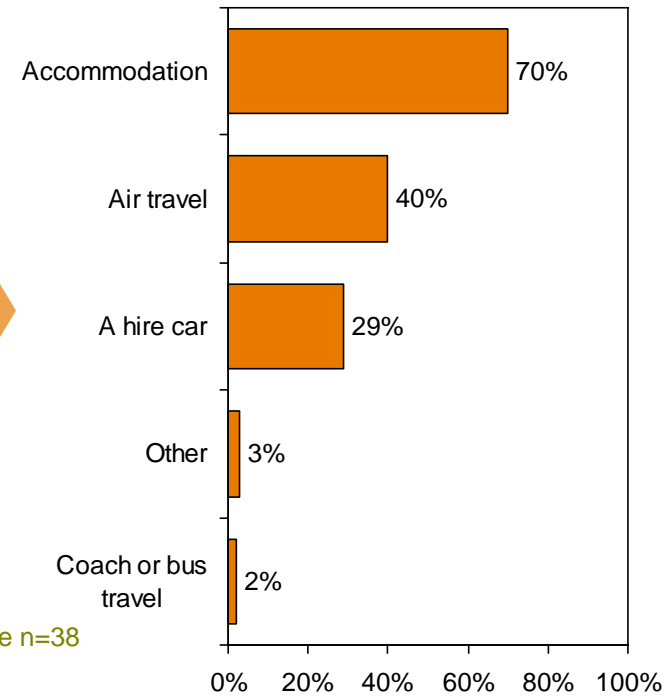
Booking on the internet

“Prior to your trip, did you make any bookings for the trip on the internet ?”



Base n=92

“What did you book on the internet?”



Base n=38

What did they spend?

- ***Average Expenditure***
- ***Proportion spent on various items***

Average expenditure

“How much have you spent so far in the Darling Downs, including any money paid before the trip, and excluding any package expenditure?”

How much do you think you will spend in the Darling Downs for the remainder of your stay excluding any package expenditure?”



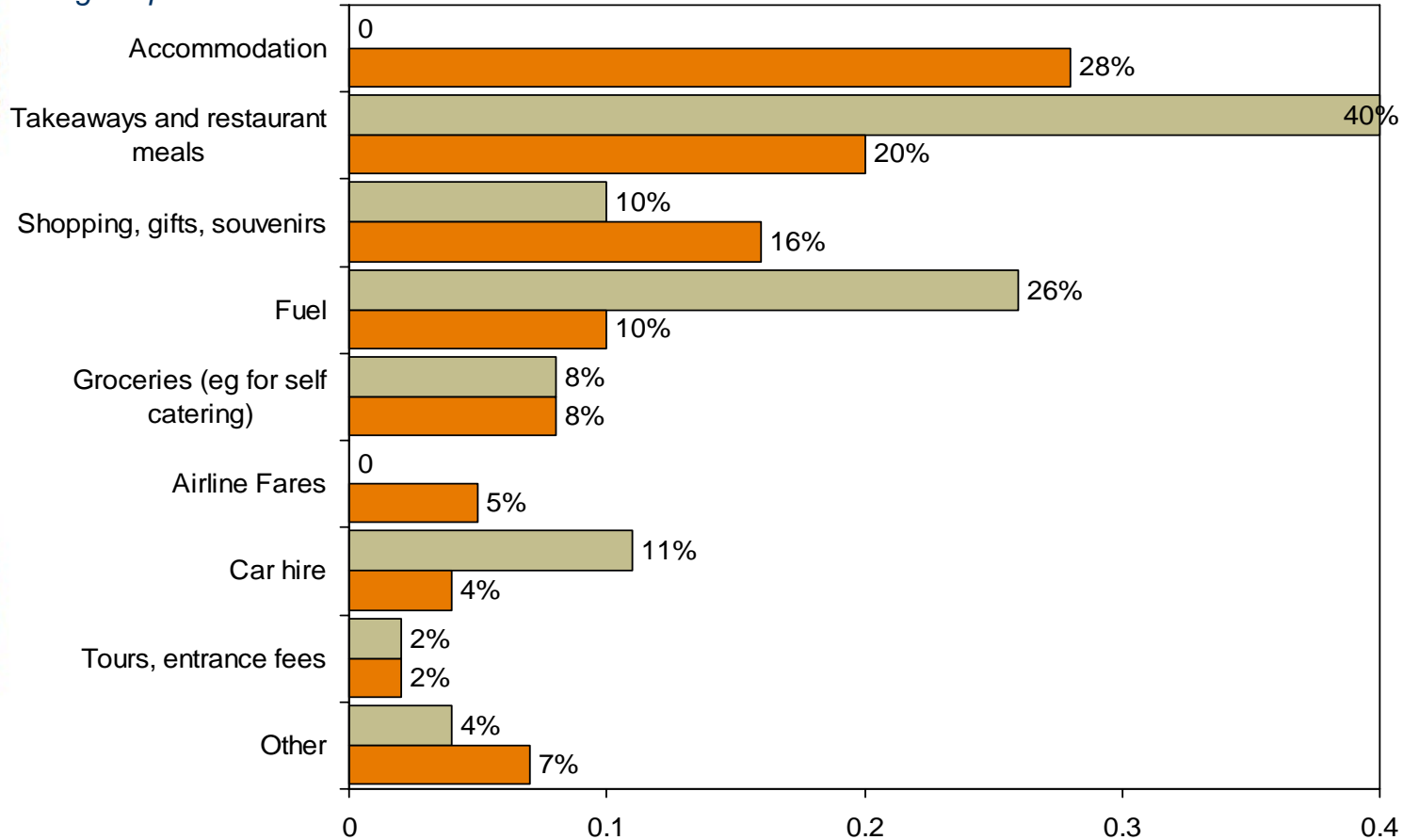
Base n= 89 (day) 203 (overnight)

■ Per day visitor ■ Per overnight visitor

Proportion spent on various items*

"How much have you spent so far in the Darling Downs, including any money paid before the trip, and excluding any package expenditure?"

"How much do you think you will spend in the Darling Downs for the remainder of your stay excluding any package expenditure?"



* Proportion of total, excluding other major capital expenses

Base n= 89 (day) 203 (overnight)

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■ day visitor ■ overnight visitor

Tourism Australia
Tourism Research Australia



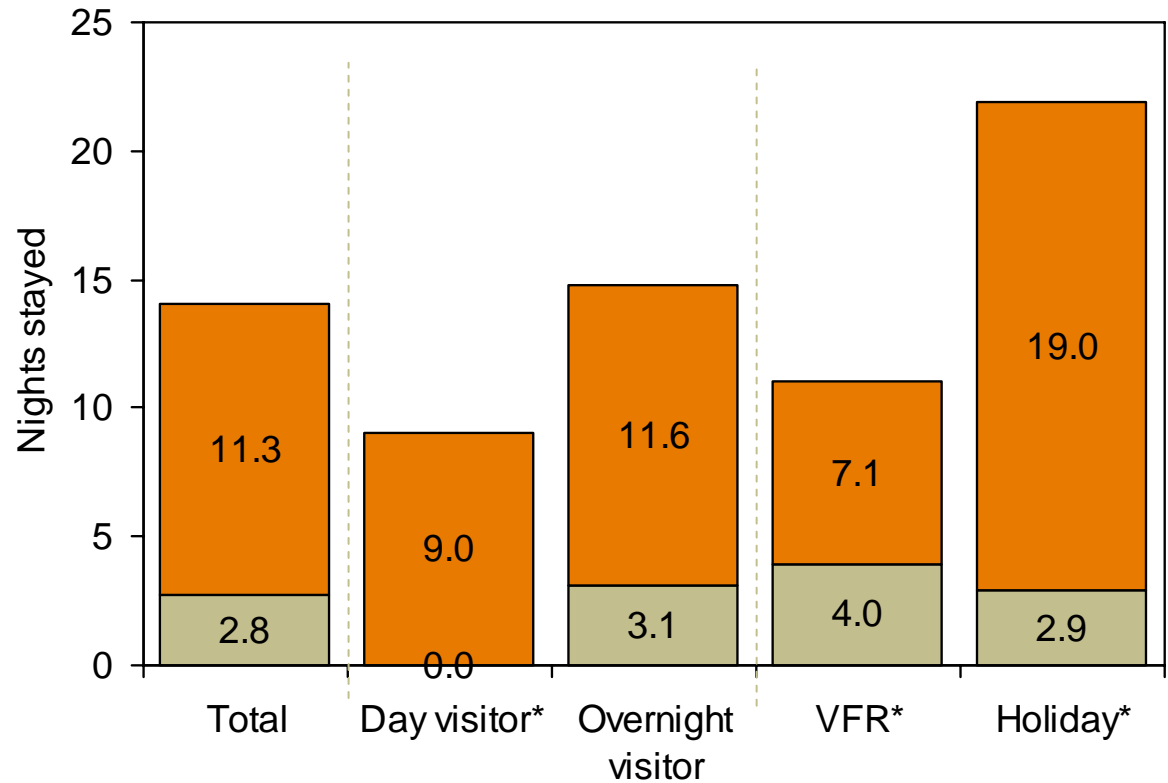
Trip Details

- ***Length of trip***
- ***Transport to destination***
- ***Accommodation***
- ***Travel party***

Average length of trip (number of nights)

"How many nights did you stay in the Darling Downs during this trip?"

"In total, how many nights did you stay away from home for your entire trip?"



Base n=220

*Day n=26 (small base)

Overnight n=194

VFR n= 48 (small base)

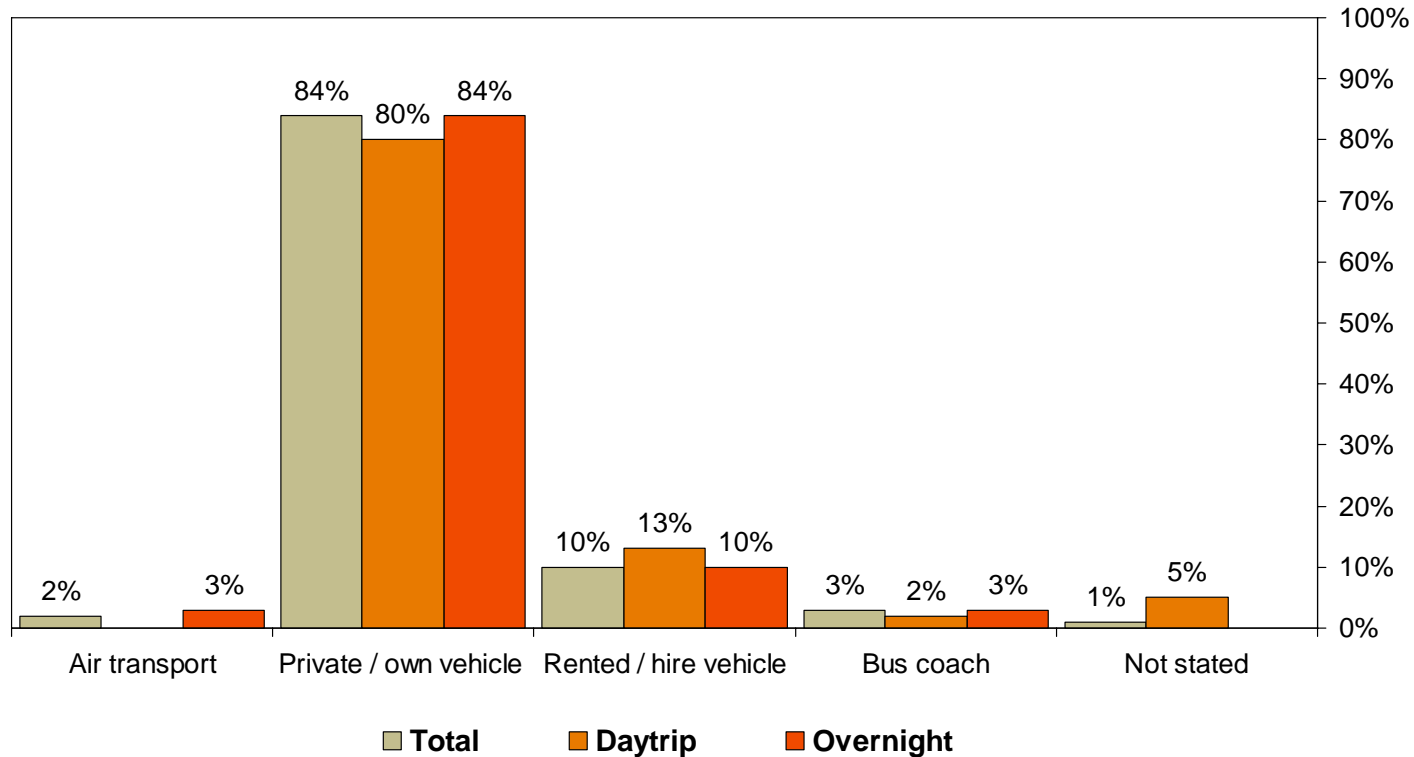
Holiday n= 103 (small base)

■ Total nights not at Darling Downs

■ Nights at Darling Downs

Main transport to destination

"What was the main form of transport that you used to get to the Darling Downs today?"



Base n=220

*Day n=26 (small base)

Overnight n=194

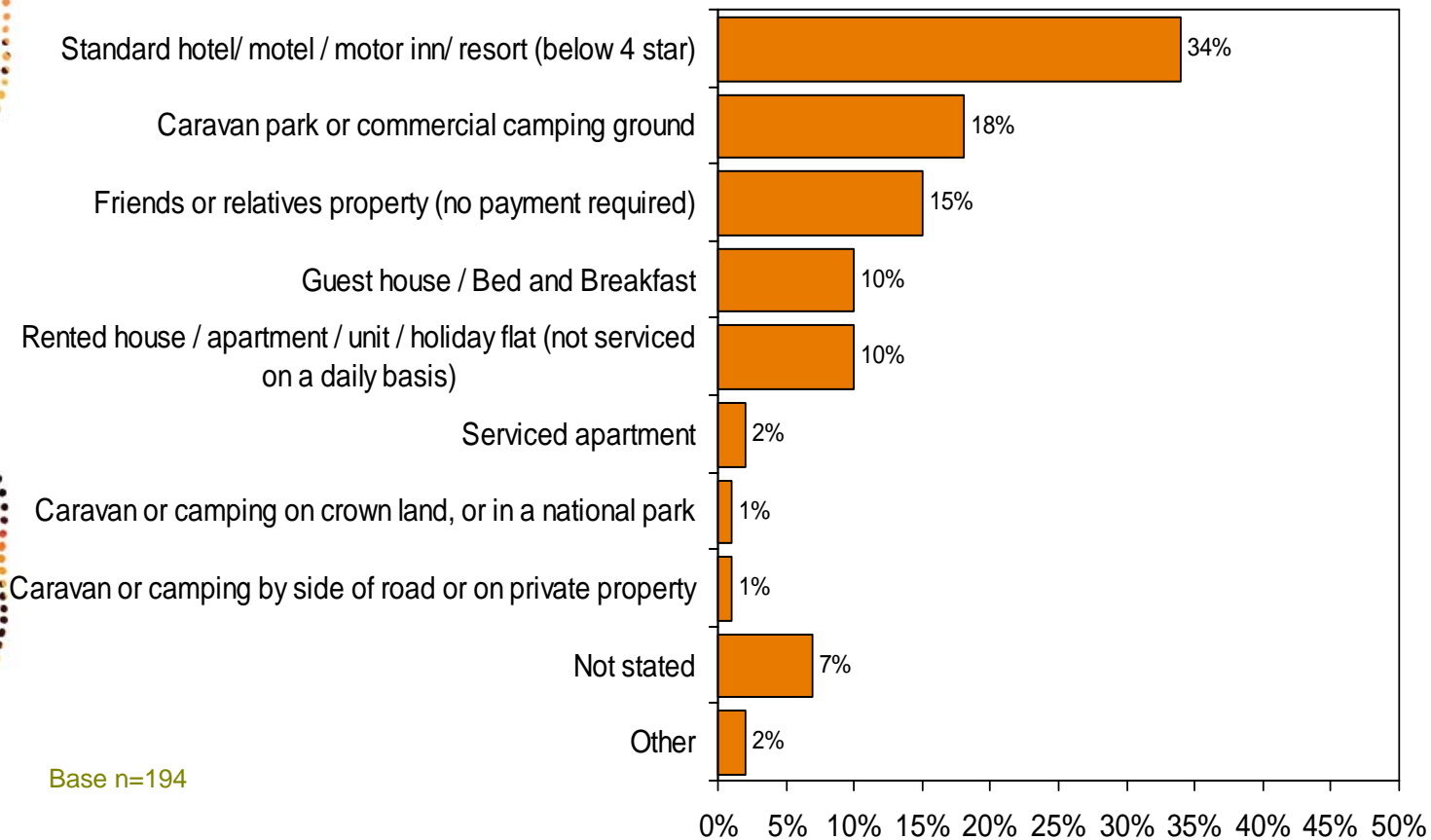
VFR n= 48 (small base)

Holiday n= 103 (small base)

Type of accommodation mainly used

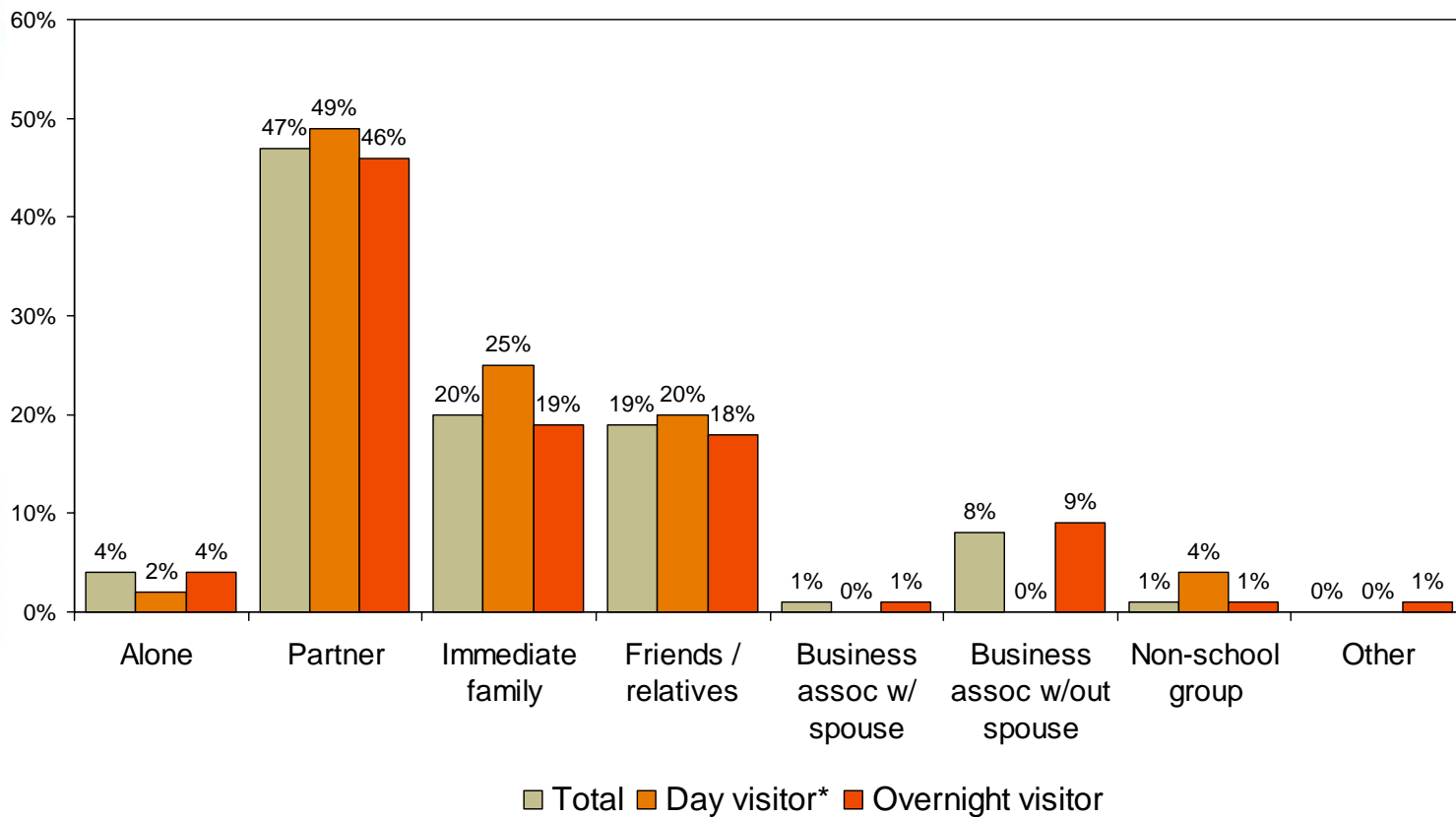
(Those who stayed overnight)

“What type of accommodation did you mainly use in the Darling Downs?”



Travel Party

“How would you describe your travel party, that is, all persons with whom you directly traveled and shared most expenses? Traveled with ...”



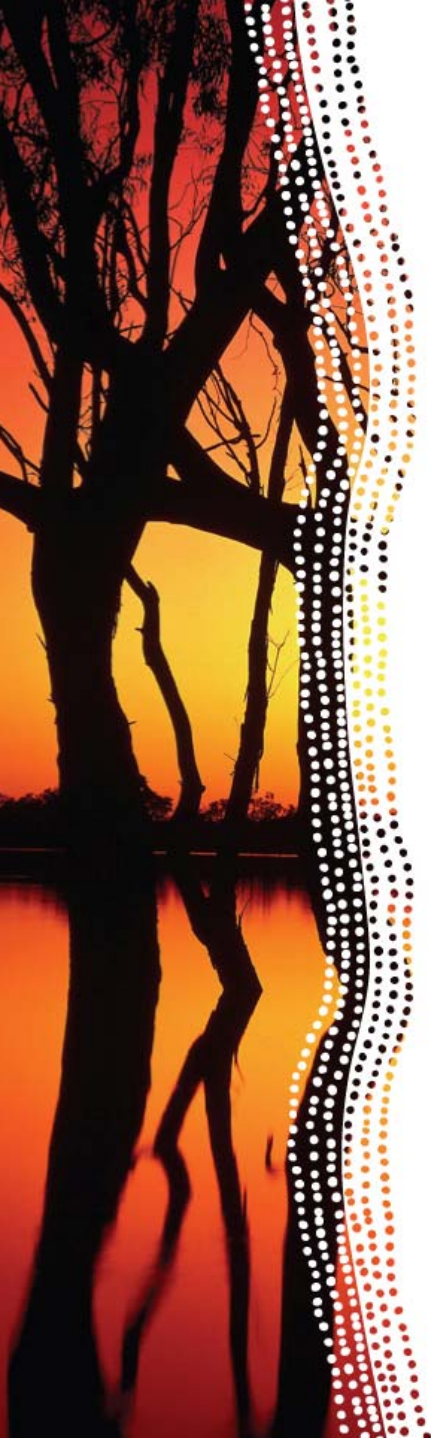
Base n=220

*Day n=26 (small base)

Overnight n=194

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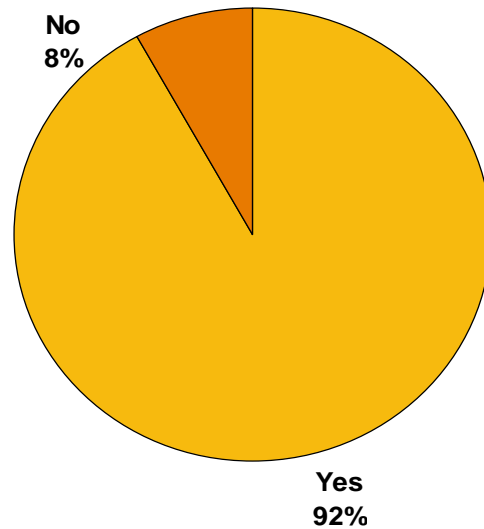
About the visitors



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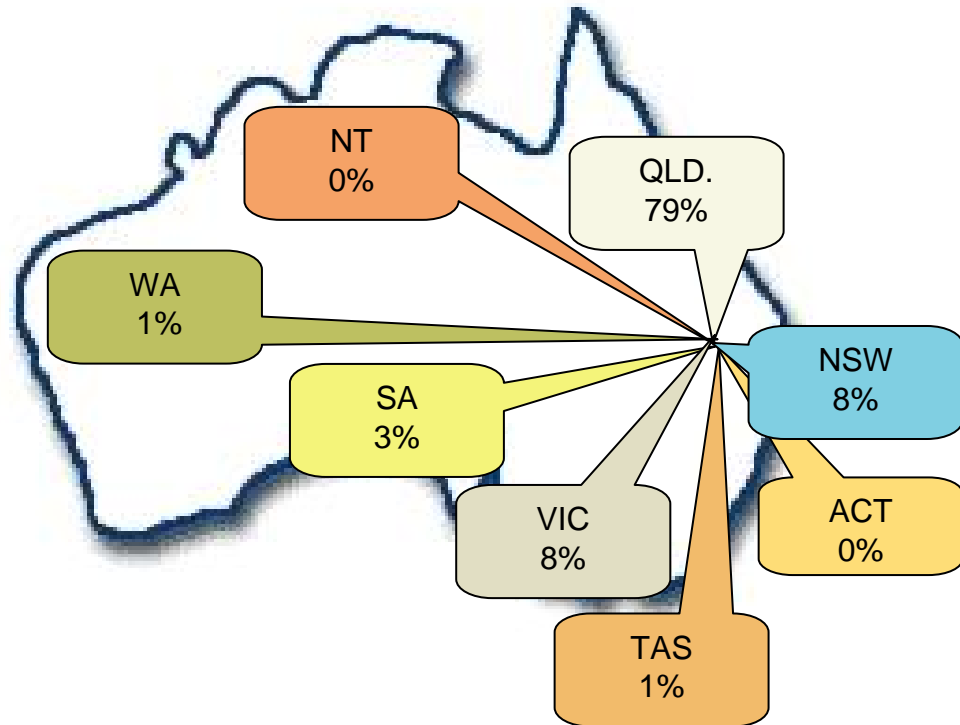
Visitors – Usual Residence

“Do you reside in Australia?”



Base n=220

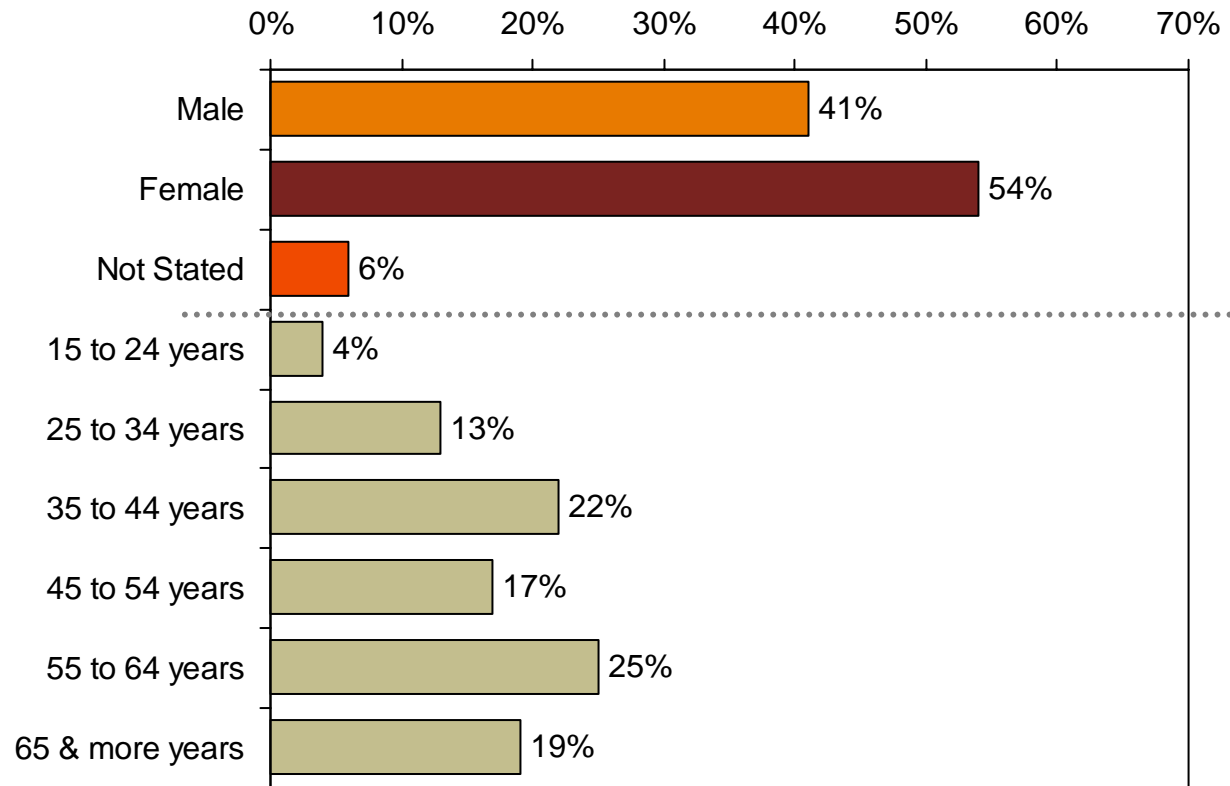
“In which State or Territory do you reside?”



Gender & Age of Visitors

"What is your age?"

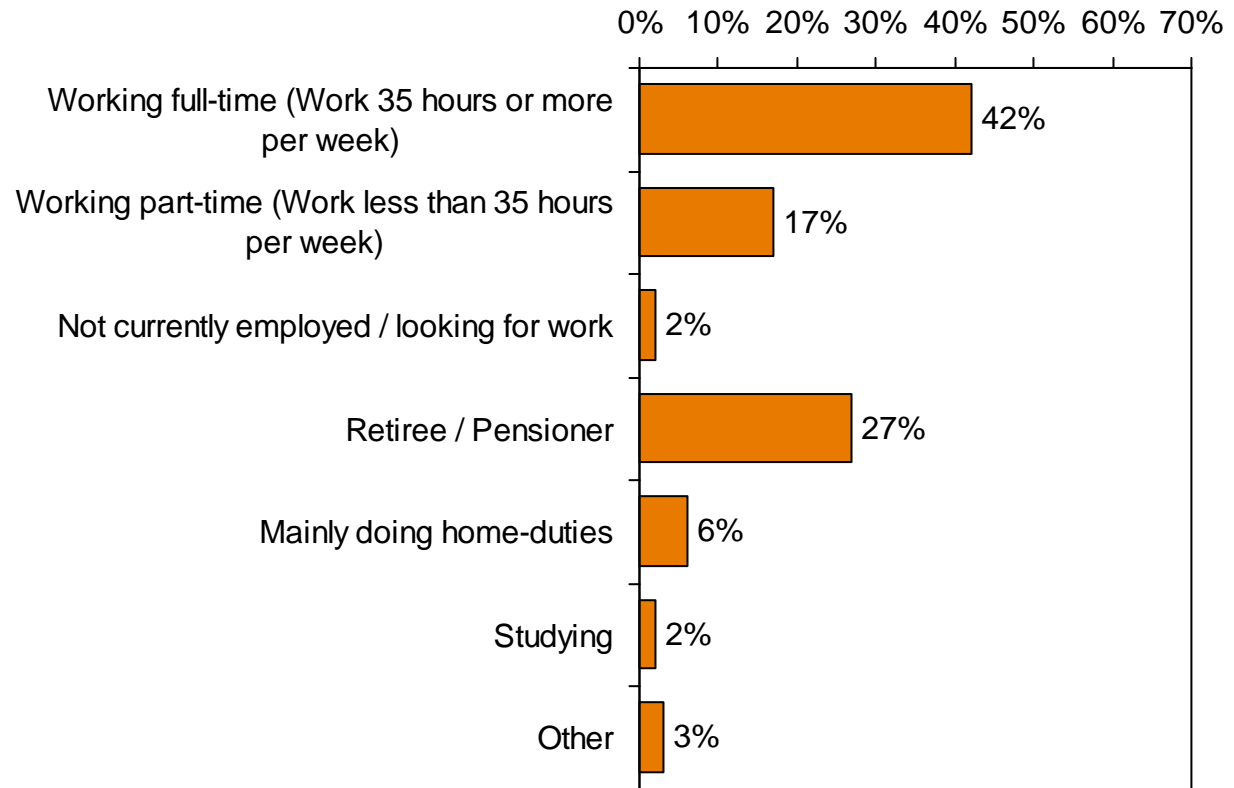
"Are you: Female or Male?"



Base n=220

Working Status

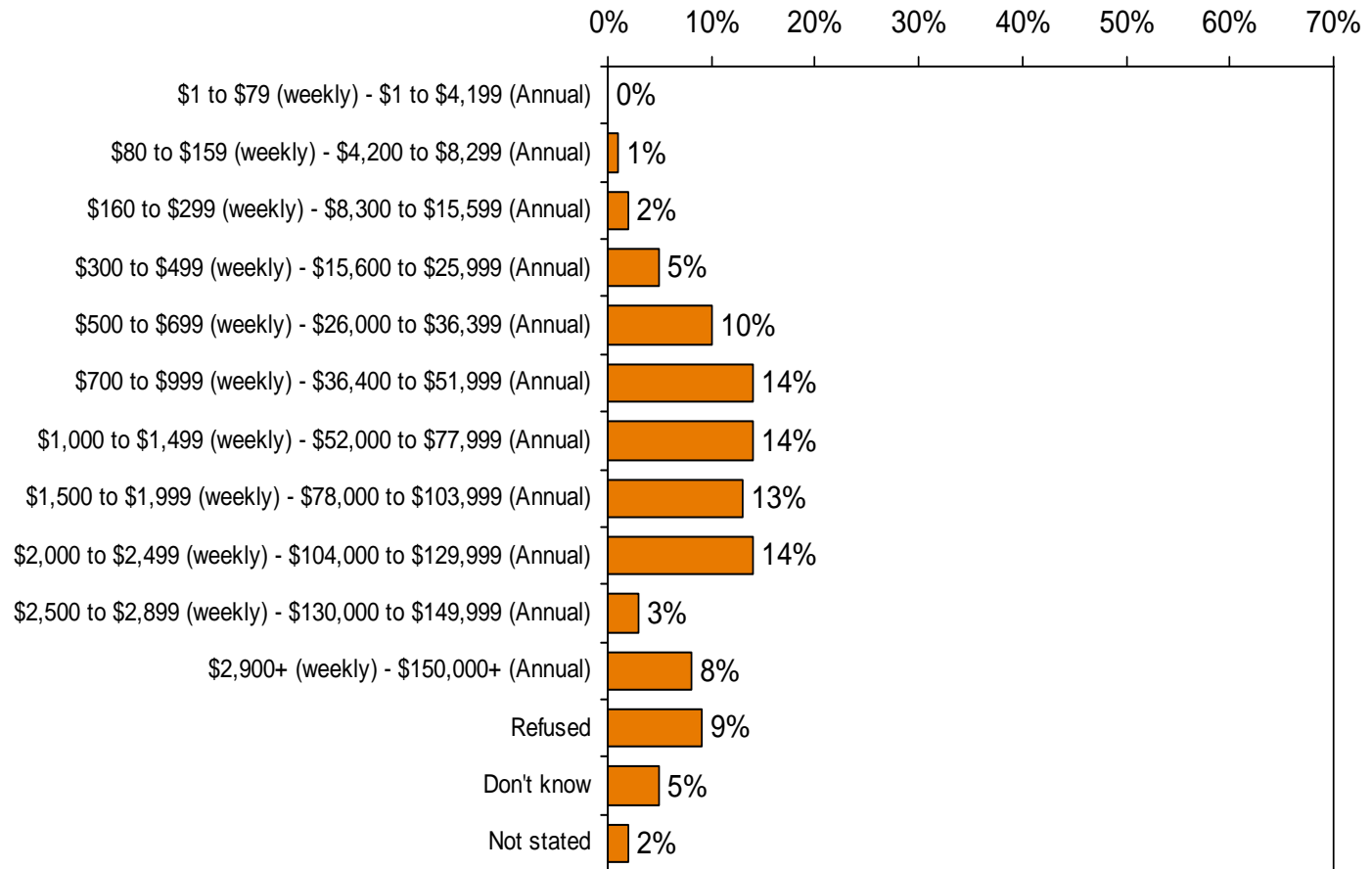
“Which one of the following best describes what you are mainly doing at present? Are you...”



Base n=220

Weekly household income before tax

“And which one of the following options best reflects the combined income of everyone in your household, before tax or anything else is taken out? Please include pensions and allowances from all sources.”



Base n=220

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Lifecycle

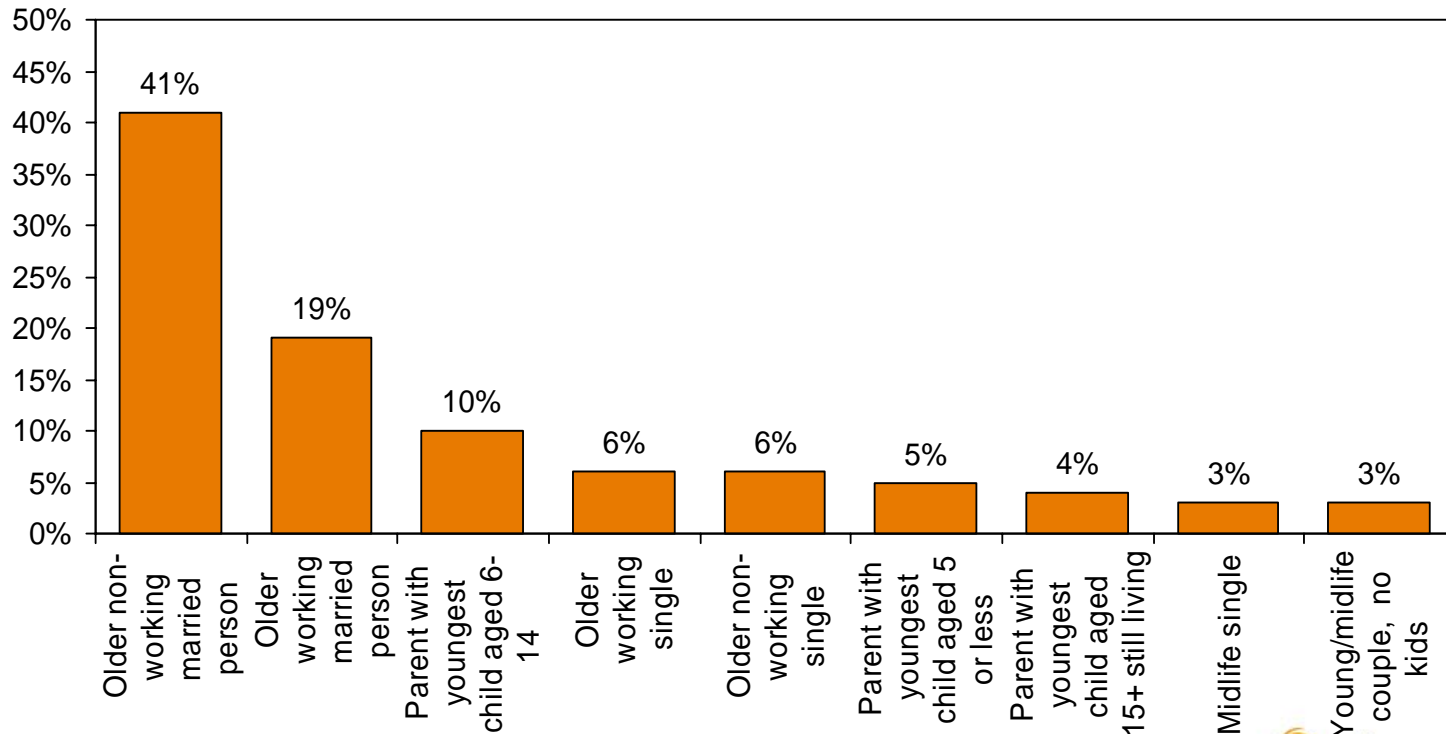
“Are you single or part of a couple?”

“Do you have any children aged 15 to 24 living with you for whom you are the parent or guardian?”

“Do you still live at home (with a parent / your parents?)”

“How old is the youngest child for whom you are a parent or guardian?”

“Do you currently have any children aged 14 years or younger living with you for whom you are a parent or guardian?”

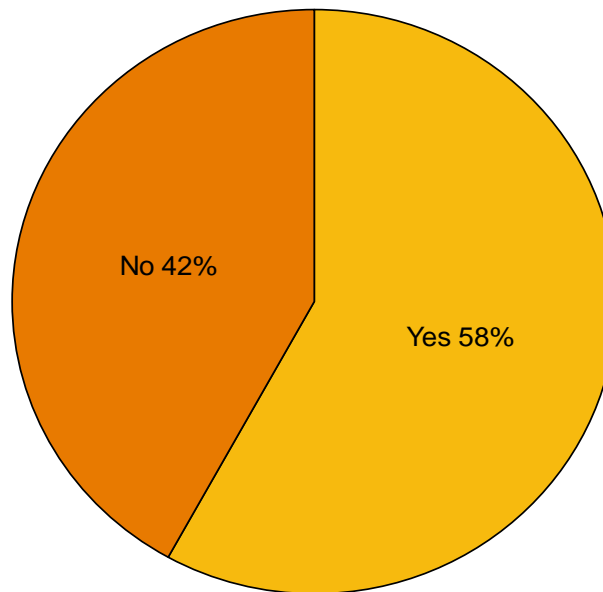


Base n=113



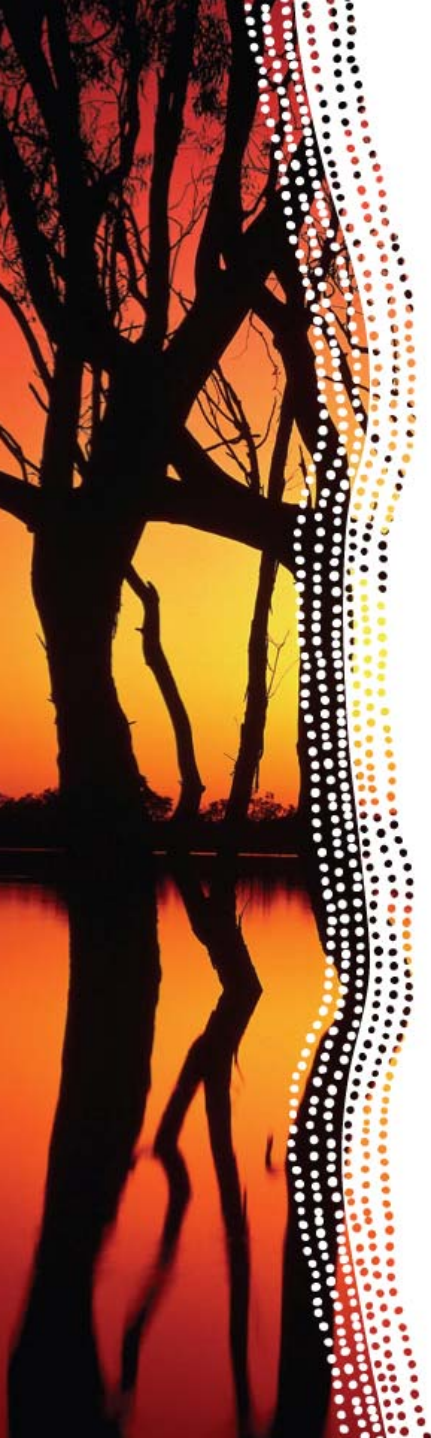
Willing to be recontacted?

"We will be re-contacting a small number of those taking part in this survey to be able to fully understand the survey results and to get ideas on how to improve the experience for those visiting the Darling Downs. Would you be happy for us to contact you by telephone to answer a few questions or to arrange a face-to-face interview?"



Base n=220

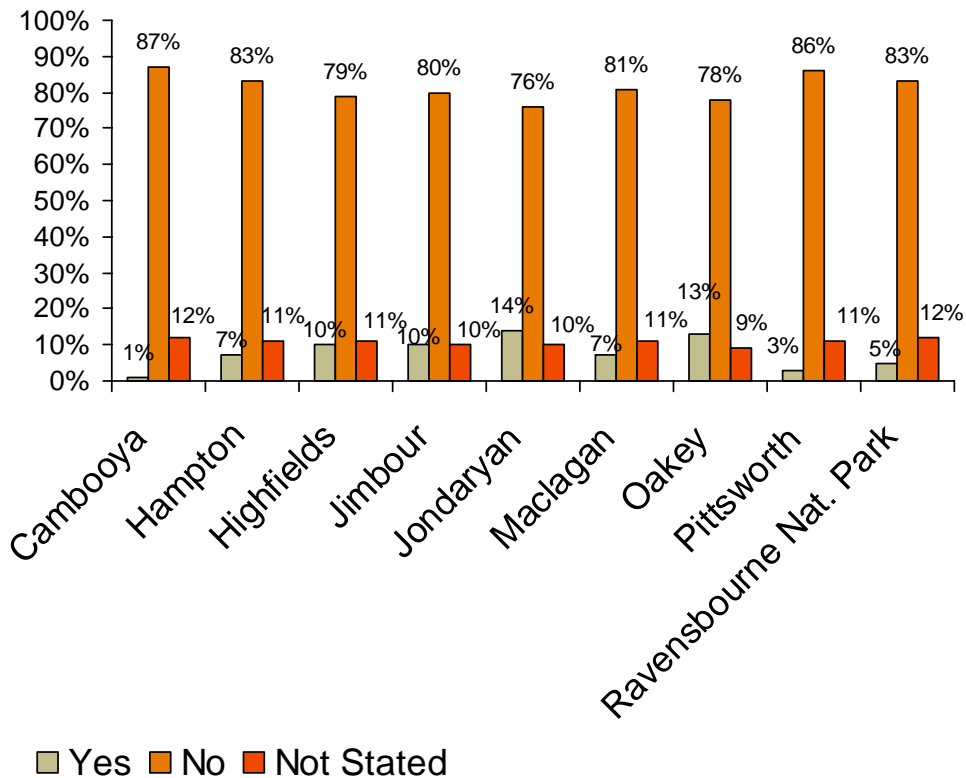
Specific Questions



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Did you visit any of these locations?

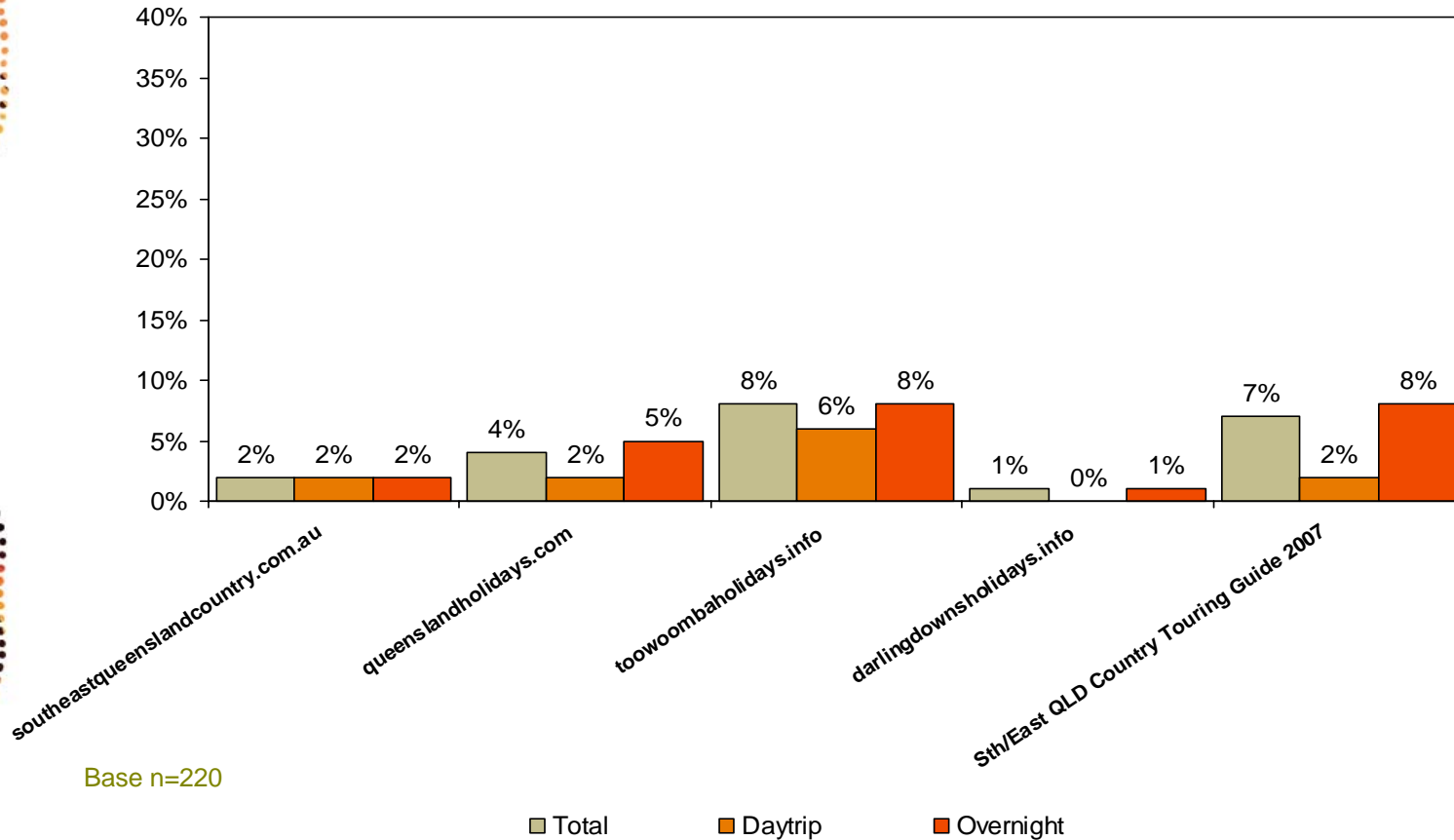
“Did you visit any of the places listed below while you were in the Darling Downs region?”



Base n=220

Information sources – Specific Websites

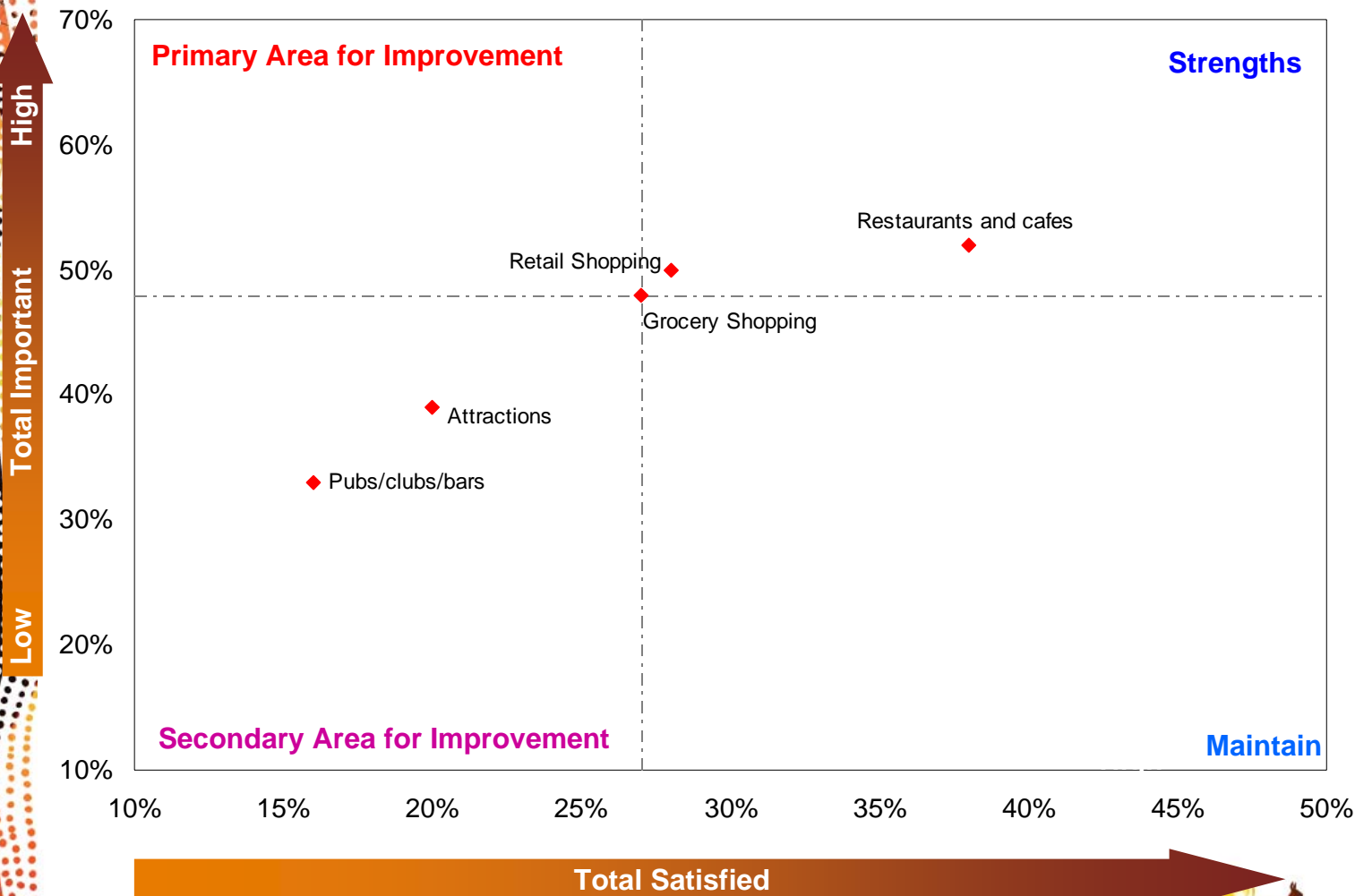
“Before leaving home, which of the following information sources did you use to obtain information for this trip to?” - Darling Downs specific websites only



Importance versus Satisfaction

“How important or unimportant was it that the following had extended opening hours ...”

“And how satisfied or dissatisfied were you with the available opening hours at the following...”

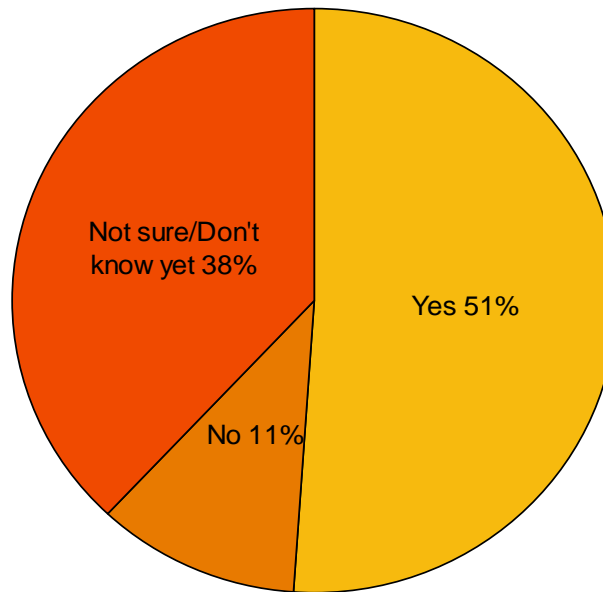


*Satisfaction rescaled to exclude 'Not Applicable'

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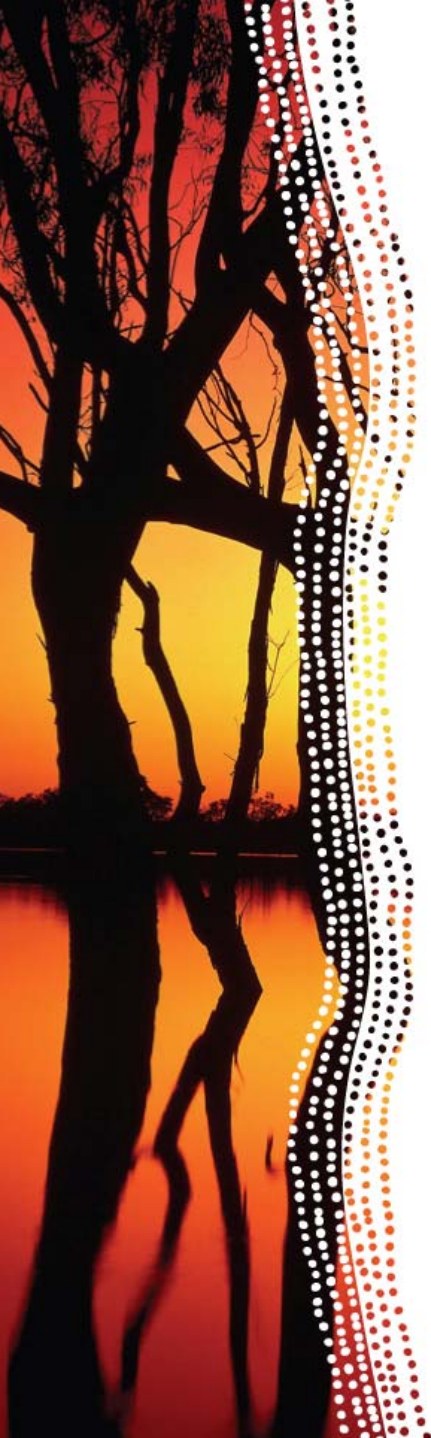
Willing to return in the same season

"Do you think that if you did return to the Darling Downs you would return in the same season again (i.e. Winter)?"



Base n=220

Appendix



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Methodology

Field dates

- 14/07/07 – 28/07/07

Face to Face Recruitment Locations

- Picnic Point Lookout, Cobb & Co Museum, Toowoomba VIC, Quality Hotel Burke & Wills, Ruthaven & Margaret St Intersection.

Postcard Recruitment Locations

- Hampton VIC, Cobb & Co Museum, Toowoomba VIC, Quality Hotel Burke & Wills, Picnic Point Toowoomba Café, Jondaryan Woolshed, Dalby VIC, Danish Flower Art Complex, Eastgate on the Range Motel, Preston Peak Wines, Crows Nest Motel, Villa Nova Motel, Lauriston House Bed & Breakfast, Rlmfire Winery & Wedgetail Ridge Estate.

Recruitment Numbers

- Face to Face – 291
- Postcard – 247

Response rates

- The response rate was 41% (220 completes from 538 recruits)

Weighting

- The data was weighted using National Visitor Survey data.

Overview of Methodology

Recruitment

Basic demographics
Expenditure

Face-to-face intercept
interviews at selected
locations

Postcards
recruitment at
selected locations

Choice of ...

Main Survey

Online Survey

Mail Survey

- Two different recruitment methodologies
- Two different survey methodologies

		Headings and Banners																
		Statistical difference letters																
		Proportions/Mean: Columns Tested (5% risk level) - A/B/C - A/D/E/F/G/H/I - A/J/K/L - A/M/N/O/P - A/Q/R/S - A/T/U/V/W - A/X/Y/Z/ab - A/c/d - A/ef																
		* small base; ** very small base (under 30) ineligible for sig testing																
		Region																
		Destination																
		Origin																
		Main Purpose																
		Total	Outback	Flinders Ranges	Cooper Pedy	Wilpena	Marree	Port Augusta	Port Pirie	Melrose	Interstate	Intrastate	Overseas	VFR	Holiday	Business	Other	
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
15	Base: Total Interviews	579	263	316	125	300	138	0	5	11	361	167	51	14	531	13	18	
17	Base : Wtd	229	182	47	135	47	47*	**	**	**	131	59*	39*	7**	205	8**	7**	
19	Visiting friends	4	4	0	1	0	3	0	0	0	0	4	0	4	0	0	0	
20		2	2	0	1	0	6	0	0	0	0	6	0	52	0	0	0	
22	Visiting relatives	3	3	1	1	1	1	0	0	0	2	2	0	3	0	0	0	
23		1	1	2	1	2	3	0	0	0	1	3	0	48	0	0	0	
25	Holidays / leisure / relaxation / getting away	199	157	42	123	42	34	0	0	0	120	42	37	0	199	0	0	
26		87	86	90	91	90	72	0	0	0	92	71	95	0	97	0	0	
28	Entertainment / attending special event - e.g. fe	3	1	1	1	1	0	0	0	0	2	1	0	0	1	0	0	
29		1	1	3	1	3	1	0	0	0	2	1	0	0	1	0	0	
31	Sport	2	1	1	0	1	1	0	0	0	0	2	0	0	2	0	0	
32		1	1	2	0	2	3	0	0	0	0	3	1	0	1	0	0	
34	Shopping	1	1	0	1	0	0	0	0	0	1	0	0	0	1	0	0	
35		0	0	0	1	0	0	0	0	0	1	0	0	0	0	0	0	
37	Work or business	7	7	0	4	0	3	0	0	0	1	4	1	0	0	7	0	
38		3	4	0	3	0	6	0	0	0	1	8	3	0	0	82	0	
39		CEN	C				E				J							
40	Conferences / exhibitions / conventions / trade	2	1	0	1	0	0	0	0	0	1	0	0	0	0	2	0	
41		1	1	1	1	1	0	0	0	0	1	1	0	0	0	18	0	

Reading the Data: Unweighted base, weighted base, weighted number, percentage (e.g. 42/total of 47)

Significantly statistically different from column headed by this letter

NB – note that “*” denotes small base and “**” denotes very small base (asterisks will be next to the Base WTD: see row 17 (for example, Marree 47*))