

Queensland's Outback Central West Visitor Profile and Satisfaction Survey



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



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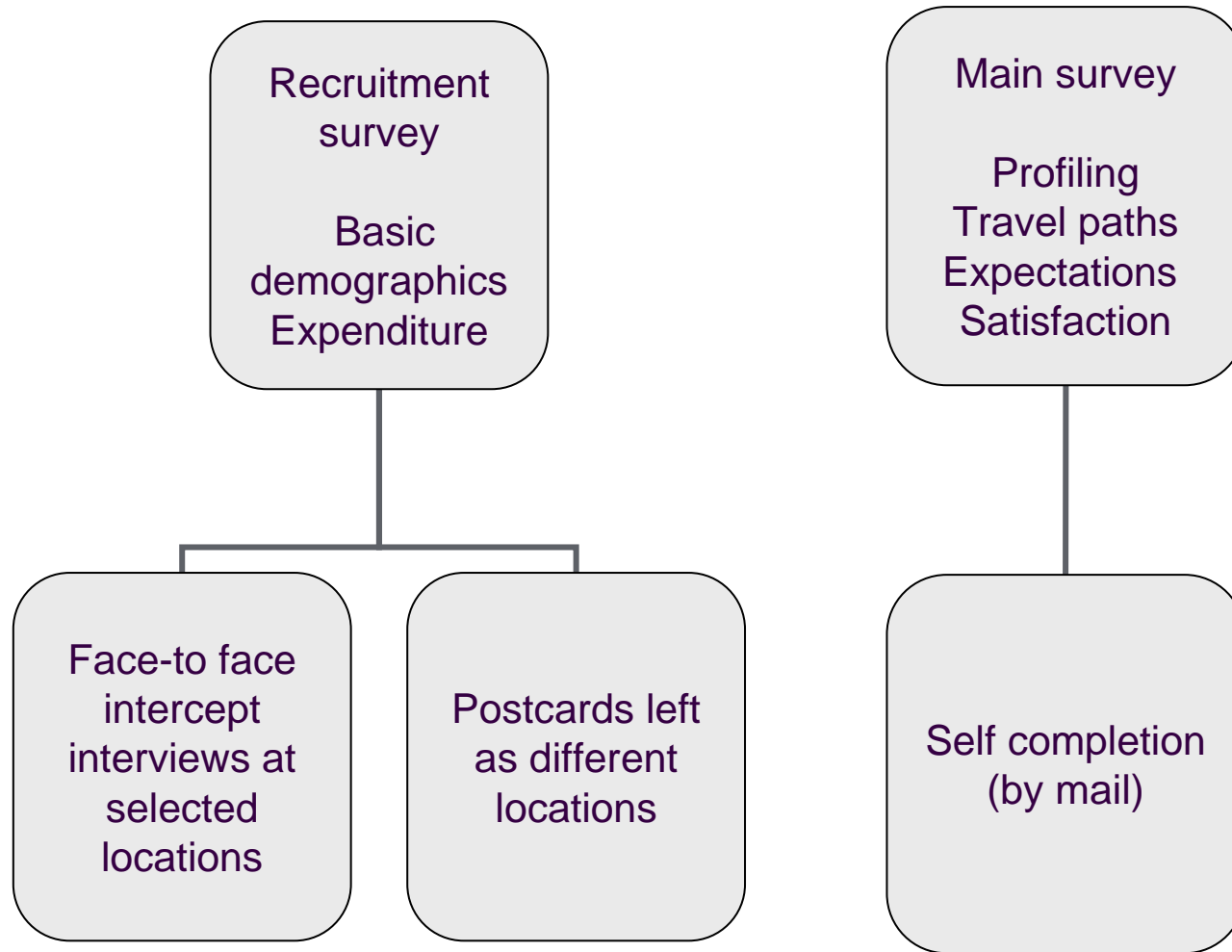
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Queensland's Outback Central West VPS project

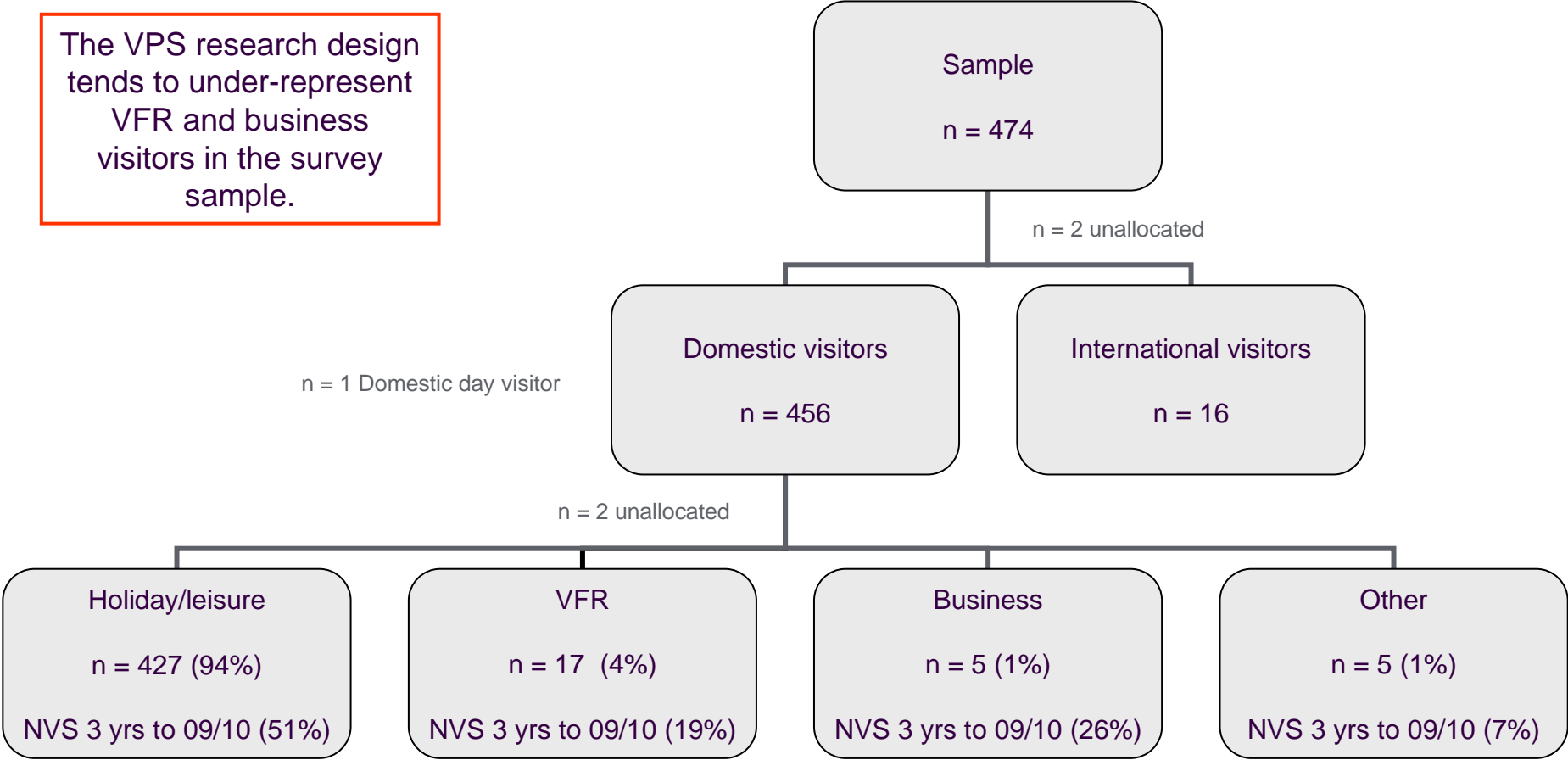
- The Queensland's Outback Central West (QOCW) Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (part of the Department of Resources Energy and Tourism).
- This VPS project comprised two phases. The first phase, and the focus of this report, was the quantitative survey which aimed to provide information on the profile and satisfaction of visitors to the region.
- The second phase comprised a series of qualitative interviews with respondents from the initial survey and aimed to expand upon and drill deeper into the findings generated in the first phase. These results are addressed in a separate report (which is also available upon request).
- Respondents to the quantitative VPS survey were recruited during their visit to the region in September and October 2010.
- The second phase interviews were conducted in November 2010.

Data collection



Survey sample

The VPS research design tends to under-represent VFR and business visitors in the survey sample.



VPS Benchmarks

- Since 2006 69 VPS projects have been completed in Australian regional tourist destinations. Data from these projects have been collated to establish the VPS Benchmark Database.
- Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents. Only the most recent waves for each destination are included.
- Comparisons against VPS benchmarks are made throughout this report. The QOCW Benchmark Summary is available in conjunction with this report. This summary provides a full set of comparisons for QOCW results against the benchmarks.

VPS Benchmarks

- Additionally some data are compared with a 'subgroup' of destinations that have similar attributes to the QOCW region. The 'subgroup' includes:
 - Broken Hill
 - Coober Pedy
 - Kakadu
 - Katherine
 - Litchfield National Park
 - Macdonnell Ranges
 - Nitmiluk National Park
 - Barkly/Tennant Creek
 - Uluru-Kata Tjuta
 - Watarrka National Park

- QOCW data are included in the benchmark.

- More detail on the Benchmark Summary is provided in the Appendix

Discussion of findings



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Discussion of findings

- The following discussion focuses on the key findings of the Queensland Outback Central West (QOCW) VPS study. The objective of the project was to supply profile and satisfaction information to QOCW about their visitors to assist in destination management planning, marketing and product development. The surveys were conducted in September/October 2010.
- In addition to the VPS survey a series of qualitative follow up interviews were conducted with a number of respondents to the initial survey. The detailed findings and conclusions from that process are addressed in a separate report. A further summary of the results and insights from both project phases is available from the TRA website www.ret.gov.au.
- The demographic visitor profile for QOCW mirrors that of many Australian outback tourism regions, with a key exception being NT outback regions which attract a significant proportion of international visitors. Outback regions are also interesting because they attract a quite homogenous visitor group, unlike many other destinations in Australia which have much more diversity in their visitor profiles.
- Visitation was dominated by older travellers – about 8 in 10 visitors were aged over 54 years.
- Most of the older visitors were retired, with two thirds of visitors in the older non-working life stage – this was a much higher proportion than the VPS benchmark.
- The older age profile was reflected in the household income profile – just over half the visitors reported annual household incomes of less than \$52,000 which is considerably higher than the VPS benchmark.
- Nearly 7 in 10 visitors travelled as a couple – also a much higher proportion than the VPS benchmark.

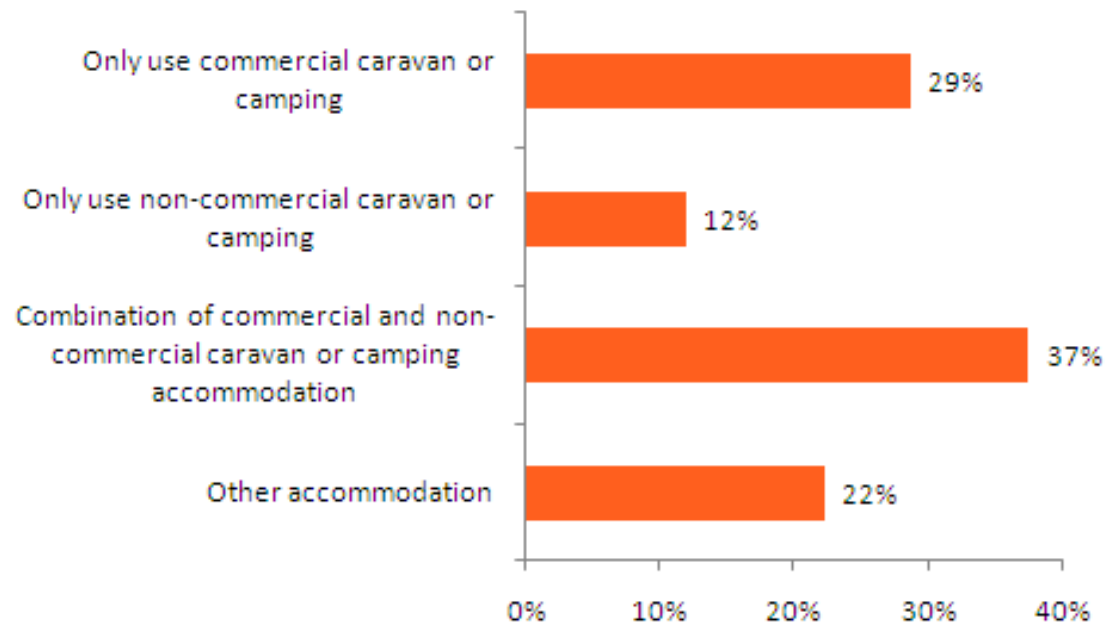
Discussion of findings

- About 6 in 10 visitors were from interstate – in QOCW these visitors were mainly from Victoria and New South Wales and most of those were from regional areas.
 - About 9 in 10 visitors were on trips of more than 7 nights (the median trip length was 35 nights) and most spent at least 4 nights in QOCW (median = 6 nights).
 - Half the visitors were first time visitors to the region – a considerably higher proportion than the VPS benchmark.
 - Nearly 9 in 10 visitors were self-drive visitors to the region.
- The profile confirms, at least during the September/October period of the survey, that the large majority of visitors to the region are older Australians on long haul self drive trips. At this point in time it would seem that there are very few short break leisure visitors to the region.
- Each respondent to the QOCW survey classified themselves into one of the different Tourism Queensland visitor segments. Just over 6 in 10 visitors classified themselves as Connectors. This proportion was similar for interstate visitors irrespective of which state they came from. In fact, almost two thirds of the Connectors in the survey were from interstate, highlighting the importance of this segment in both the interstate and intrastate markets for QOCW. The next most common segments were Self discoverers (13%) and Unwinders (12%), both in much fewer numbers than Connectors.

Discussion of findings

➤ As expected the large majority of visitors were self-drive, and three quarters of these were travelling with a caravan/motor home or were equipped with camping gear. As such the various forms of caravan park/camping ground constituted the most common type of accommodation used in QOCW (just over 7 in 10 visitors). The chart below shows that the largest proportion of caravan or camping visitors used a combination of both commercial and non-commercial sites. Those who use non-commercial sites exclusively were the smallest proportion.

➤ Proportions using commercial and non-commercial accommodation in QOCW



Discussion of findings

➤ An analysis of the expenditure of the different caravan/camping groups shows that the highest average daily expenditure per person whilst in QOCW was recorded by those who used a combination of commercial and non-commercial sites (\$90). Those who only used commercial sites spent slightly less per day on average (\$80). Visitors who utilised only non-commercial sites spent less per day (\$60), however, by virtue of the fact that they tended to spend longer in the region their total spend whilst in QOCW was comparable to the other caravan or camping groups. This analysis shows that the large majority of visitors who utilise non-commercial sites in QOCW spend significantly whilst in the region. Therefore one could argue that the key motivations for using such sites are more about experiences and itineraries than about saving money.

➤ This was reflected in the large number of experiences expected and attributes that were important to visitors who only stayed at non-commercial sites compared with other visitors to the region. Of the 20 experiences listed, 13 of them were expected by these visitors and of the 21 attributes, 13 of them were very important to these visitors - both much larger numbers than for other visitors.

➤ Experiences expected ranged from natural and cultural attractions and events to meeting the locals and escaping the crowds.

➤ Attributes that were important ranged from functional aspects like availability of free camping, waste dumping facilities, toilets and information services through to aspects around the local atmosphere.

Discussion of findings

➤ One quarter of visitors stated that the most important reason they chose to go to QOCW was to visit one or more specific attractions. No other single reason reached double figures except for the region being a convenient stopover point (11%). Positively, satisfaction with the regions' attractions scored well above the VPS benchmark, almost two thirds said they were very satisfied with the attractions. Open ended comments from respondents also reflected this with many comments about the excellent value of the attractions.

➤ The importance of attractions to the region's identity was further demonstrated by the experiences that visitors expected to have in the region. The most commonly expected experiences included to experience our nation's/Australia's history and to discover or learn something new, each well above VPS benchmarks in terms of the proportion of visitors expecting them. Both these experiences were rated very highly and were again well above VPS benchmarks for being better than expected.

➤ There were a number of other experiences and functional aspects of the region that scored well above VPS benchmarks in terms of satisfaction and exceeding expectations.

Discussion of findings

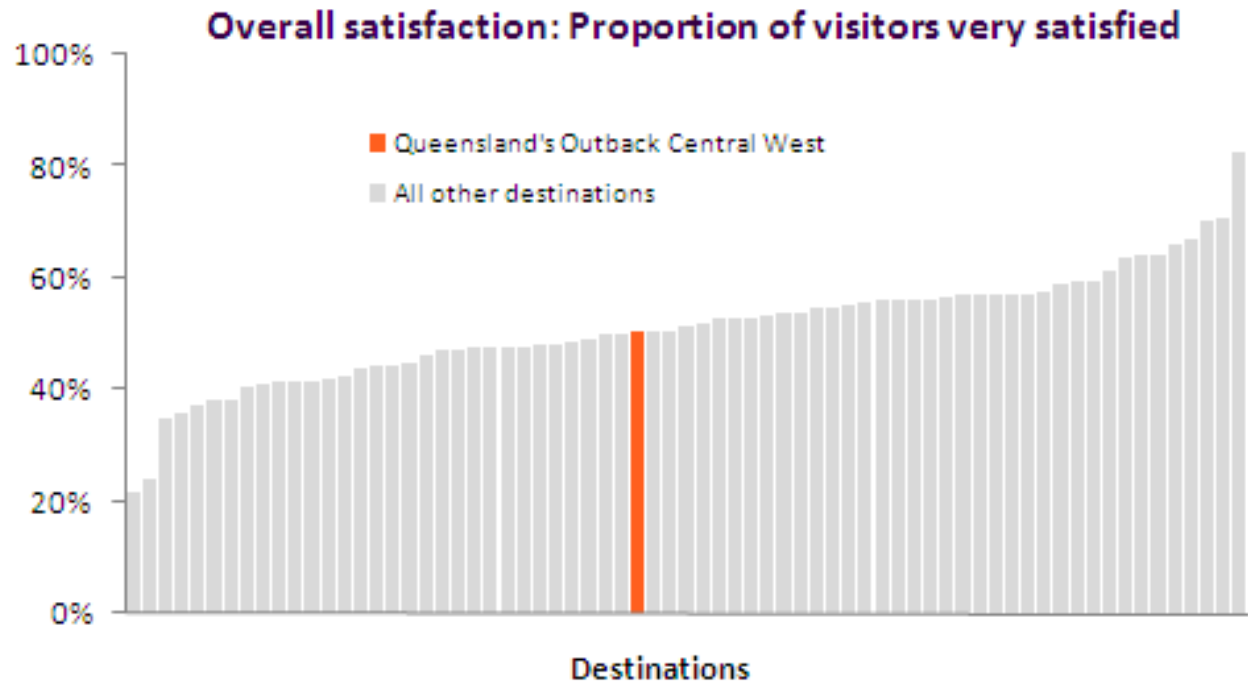
➤ These included:

- Tour around and explore
- An adventure
- Local atmosphere
- Friendliness of locals
- Information services in the region
- Attractions
- Public toilets
- Variety of things to see and do
- Personal safety and security
- Friendliness service

➤ In addition QOCW scored above the VPS benchmarks for being very likely to recommend the region to others. A couple of other themes with a high degree of satisfaction were evident from the open ended comments of visitors. A large number of visitors mentioned how pleased they were with the entertainment/information provided by caravan parks – the extra effort being made by park operators seemed to be well appreciated and left a lasting and positive impression on many customers. Another frequently mentioned area of satisfaction was with the experience visitors had in the towns themselves – this was mostly expressed as the pride that locals have in their towns, the cleanliness of the towns and the history evident in them.

➤ In terms of overall satisfaction the proportion of visitors who stated that they were very satisfied overall with their visit to QOCW was 50% which is one percentage point below the VPS benchmark of 51%. The chart below shows the QOCW ranking against all other VPS destinations.

Discussion of findings



Given the list of experiences and features that scored above VPS benchmarks combined with the other themes of satisfaction perhaps this is a surprising result. Why then didn't QOCW score a stronger result for overall satisfaction? There are a number of issues that arose as areas of concern. Some of them were reinforced via the open ended comments made by visitors.

Discussion of findings

- Satisfaction with roads was a feature that scored below the VPS benchmark. This was also an attribute that was very important to visitors relative to the VPS benchmark. Open ended responses indicated that the main issues with roads were around the presence of road kill and safety concerns in relation to road trains on narrow roads. Concern with roads is a typical one amongst outback destinations however QOCW did record lower satisfaction scores than most other outback destinations in the VPS database.
- Satisfaction with information services in the region was a feature that scored well above the VPS benchmark. However, the open ended comments revealed many instances of both satisfaction and dissatisfaction with VIC experiences. Most dissatisfaction manifested itself in the form of less than helpful service. This is possibly an indication that there is inconsistency in the service provided at VIC's across the region. In an outback area where visitors rely heavily on VICs this result should be a concern.
- Satisfaction with food and beverage and shopping were also features that scored below the VPS benchmark, although they were not mentioned often in the open ended feedback from visitors.

Discussion of findings

In terms of experiences, there were three that were expected by a majority of visitors but scored on or below VPS benchmarks in terms of exceeding expectations. They were:

- Relaxation and rejuvenation (expected by 77%; exceeded expectations of 44% which is just below the VPS benchmark)
- Nature based experiences (expected by 75%; exceeded expectations of 48% which is just below the VPS benchmark)
- A place to spend quality time with partner/friends/family (expected by 59%; exceeded expectations of 46% which is well below the VPS benchmark)

None of these experiences attracted many negative comments in the open ended feedback from visitors. However, given that each of these experiences is a specific need of Connectors it's possible that they have contributed to the average overall satisfaction score.

NB. For a more detailed discussion of the outcomes which incorporates the findings of the Qualitative Phase go to ww.ret.gov.au

Visitor and trip characteristics



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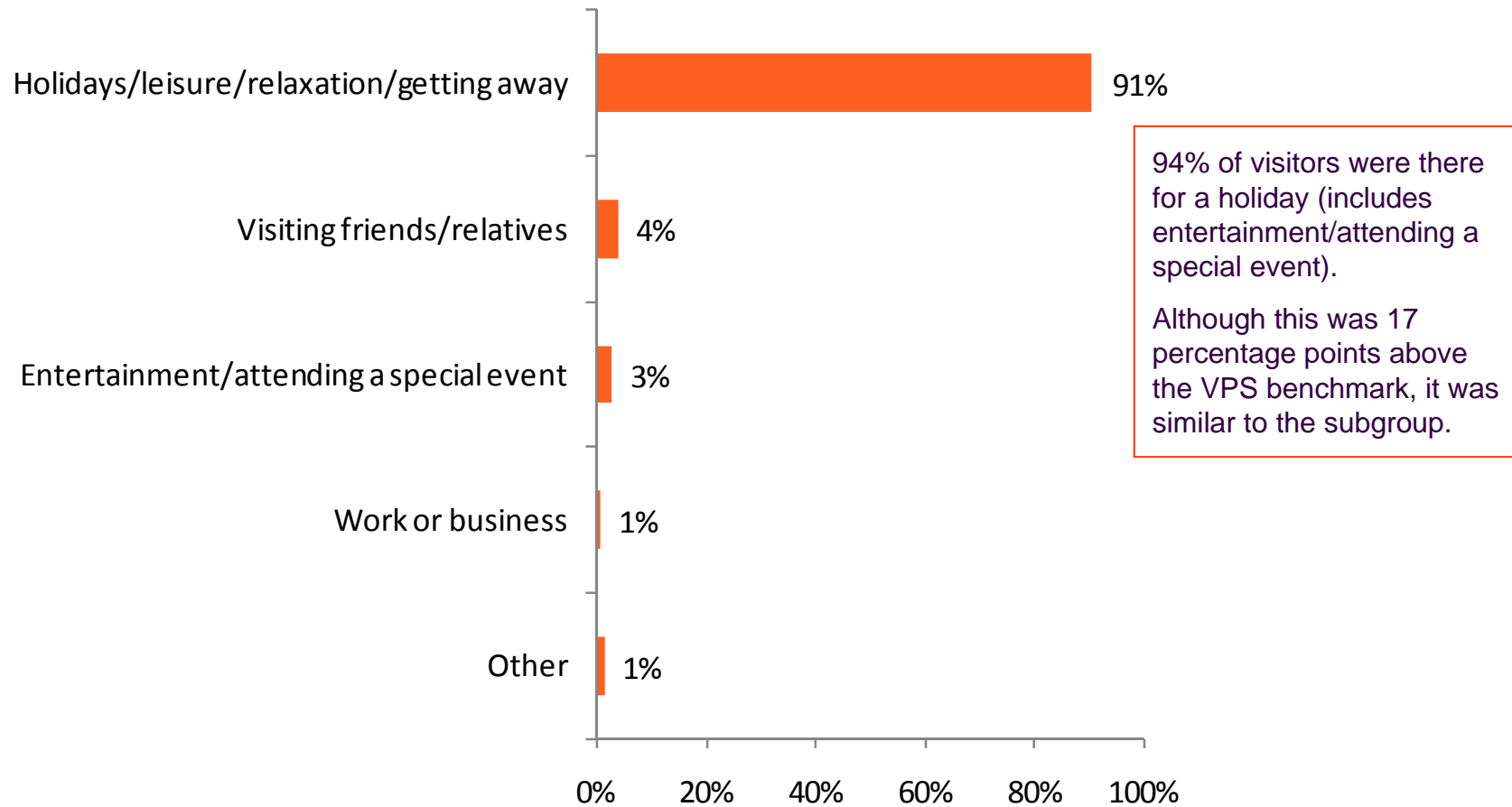


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Visitor profile (during the survey period)

- Trip purpose
- Age
- Life stage
- Travel party
- Origin

The majority of visitors were there for holiday/leisure purposes

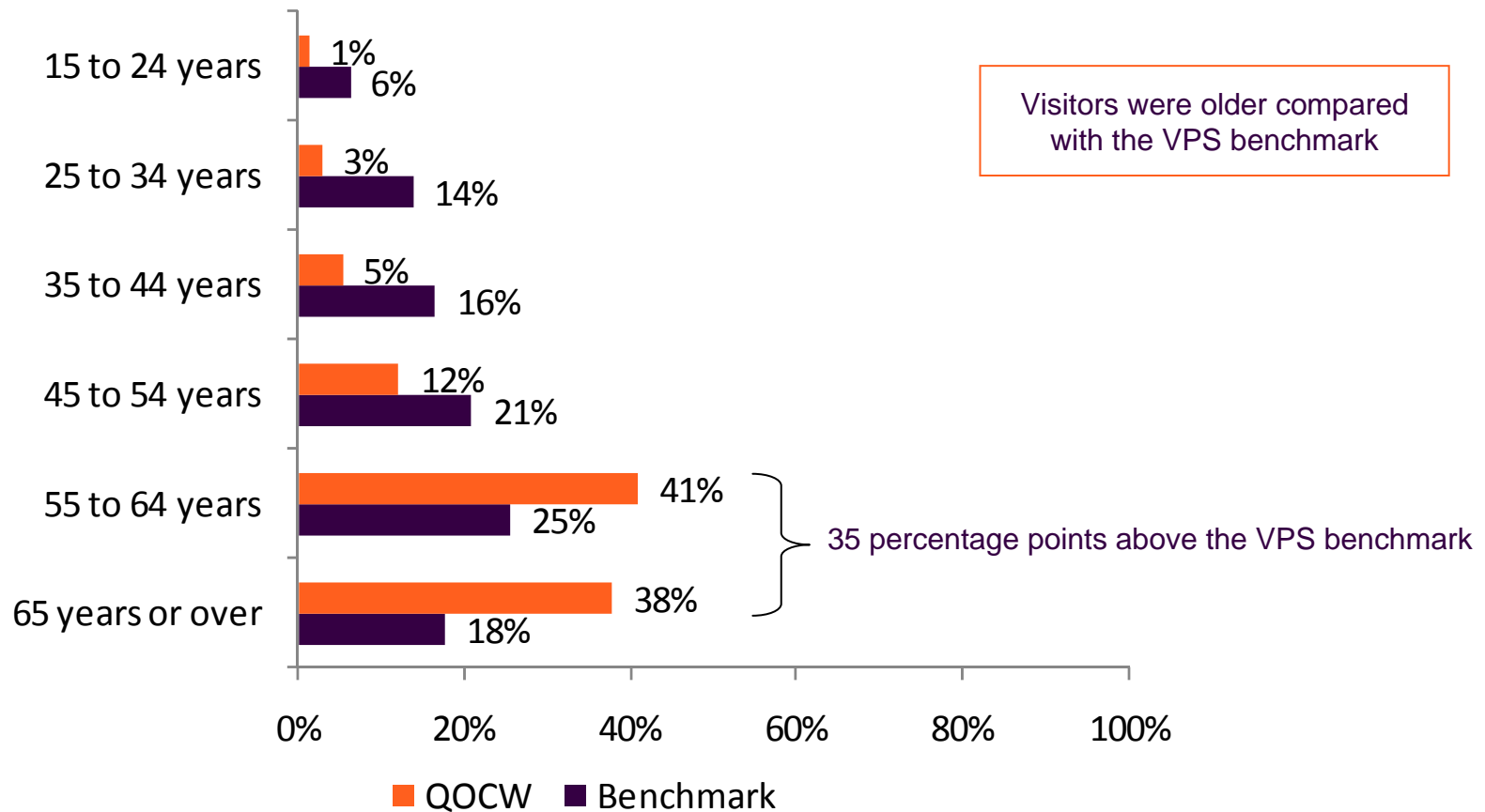


Base = 472

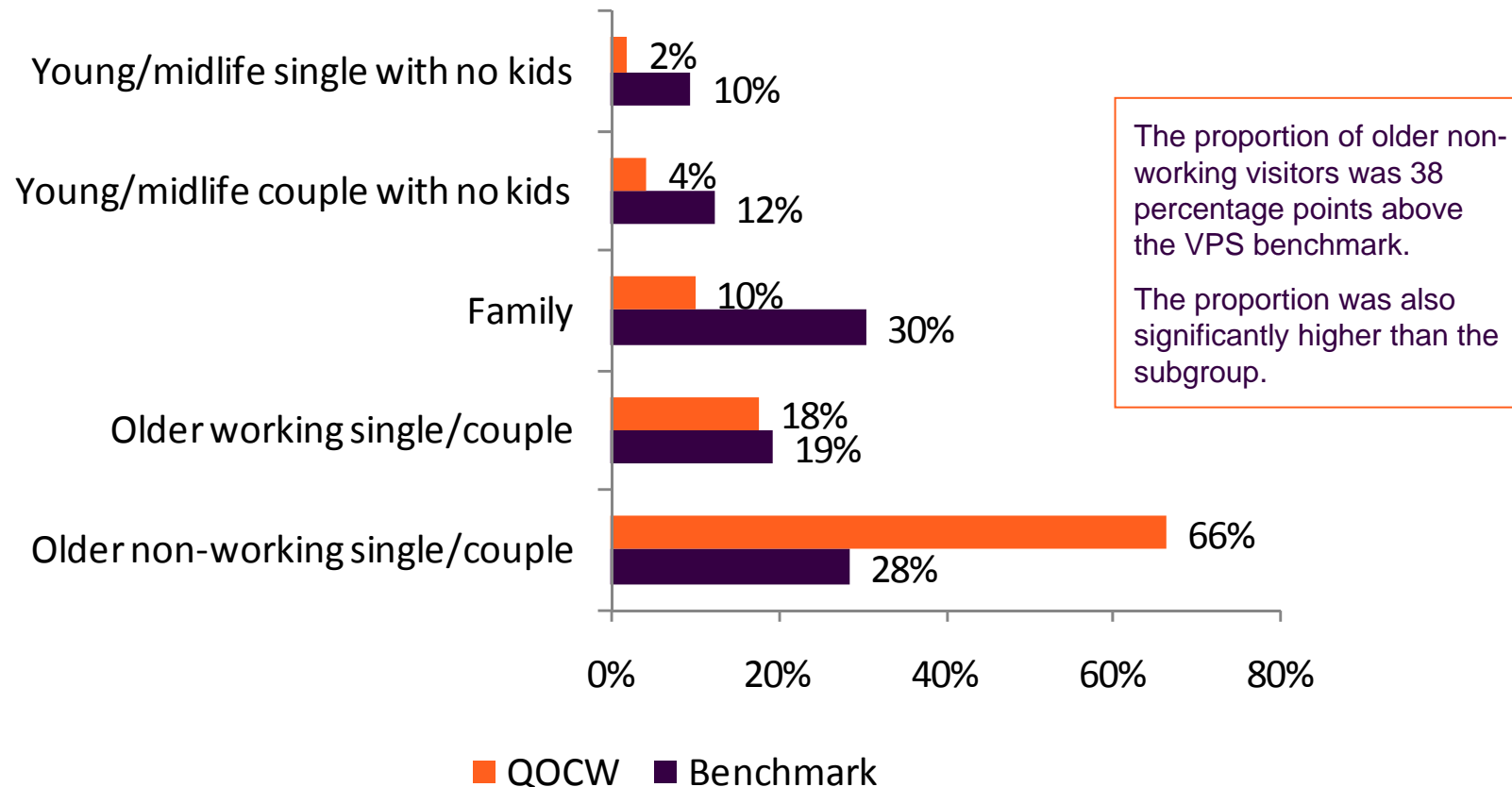
'What was the main purpose of the trip?'

Like many Australian Outback destinations most visitors were older

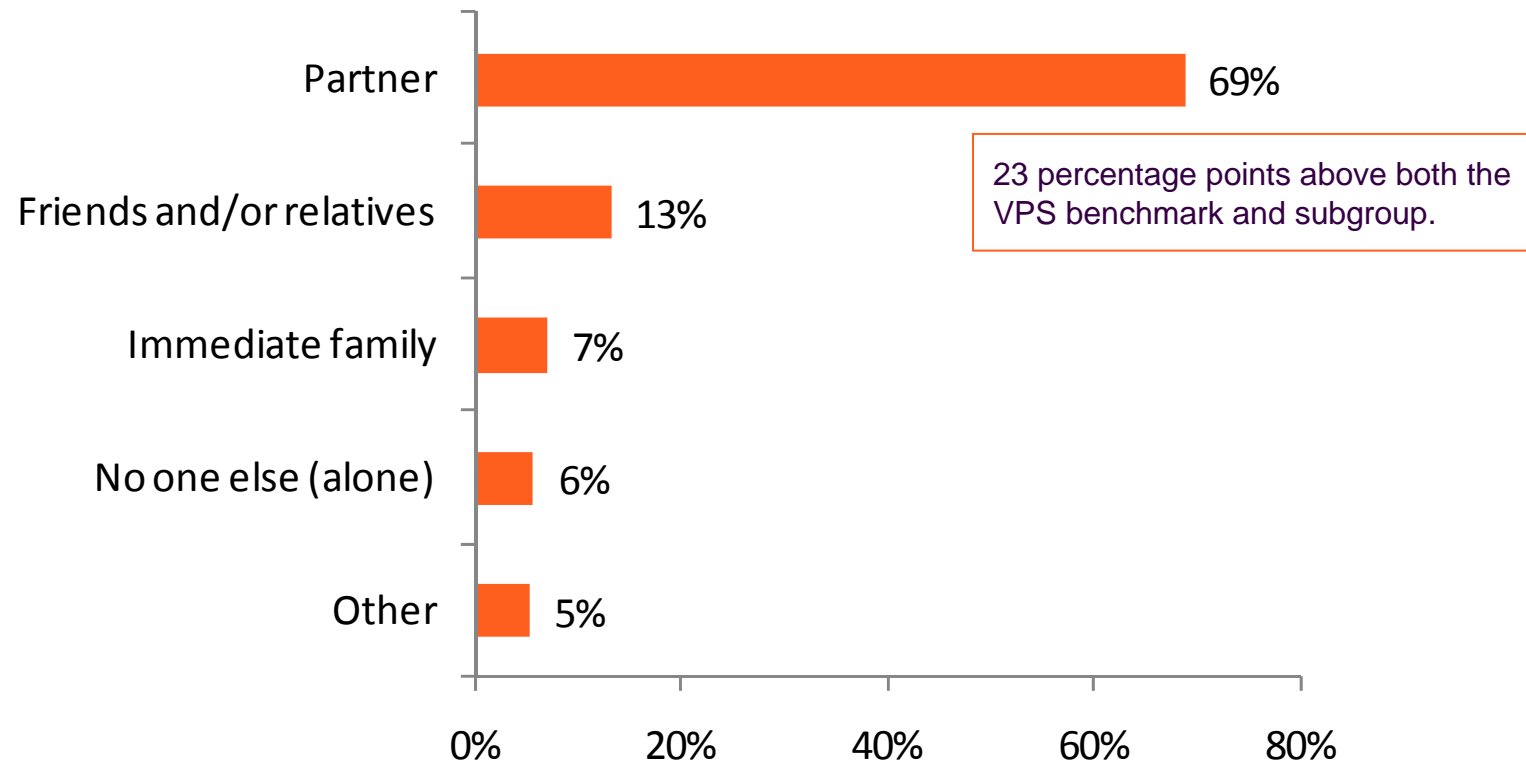
- about 80% were over 55 years -



Nearly four in five older visitors were retired, well above the VPS benchmark



The majority of visitors travelled as a couple, well above the VPS benchmark



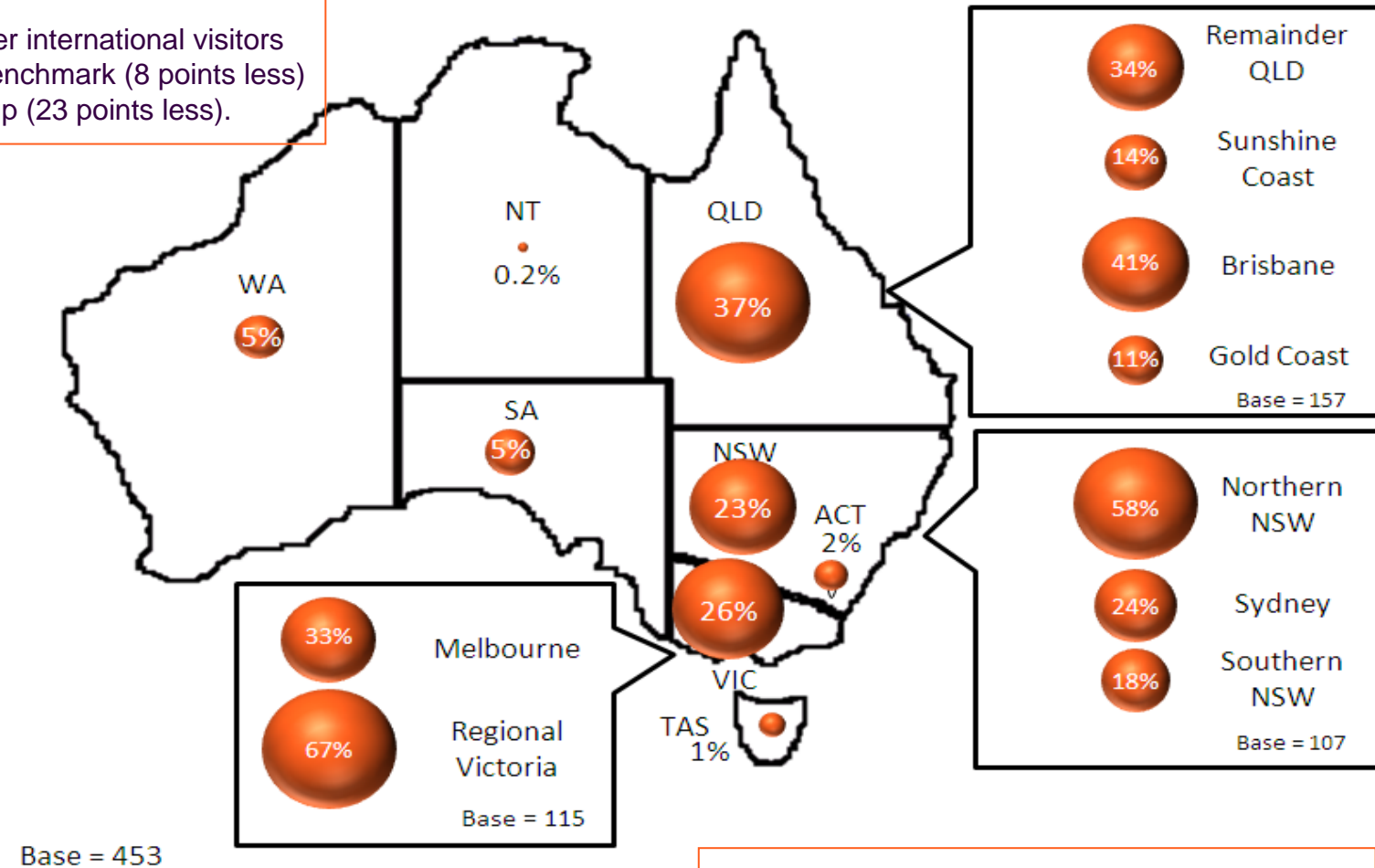
Base = 469

"How would you describe your travel party, that is, all persons with whom you directly travelled and shared most expenses? Travelled with ..."

Visitors were from Qld, Vic and NSW - the majority of them from regional areas

97% of visitors were domestic visitors.

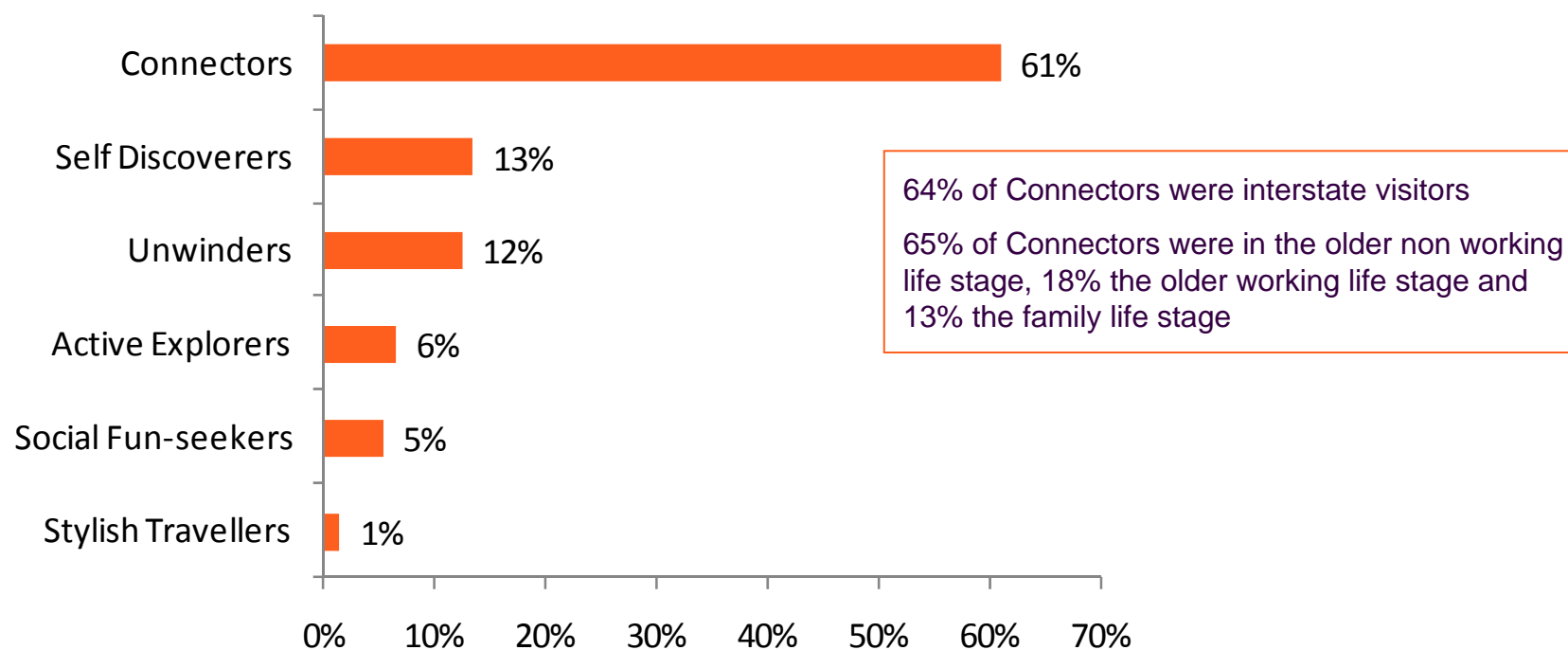
There were fewer international visitors than the VPS benchmark (8 points less) and the subgroup (23 points less).



63% of domestic visitors were interstate visitors – 15 percentage points above the VPS benchmark, but only 4 points below the subgroup

“In which State or Territory do you reside?”
 “What is your home postcode ”

Three fifths of visitors were Connectors



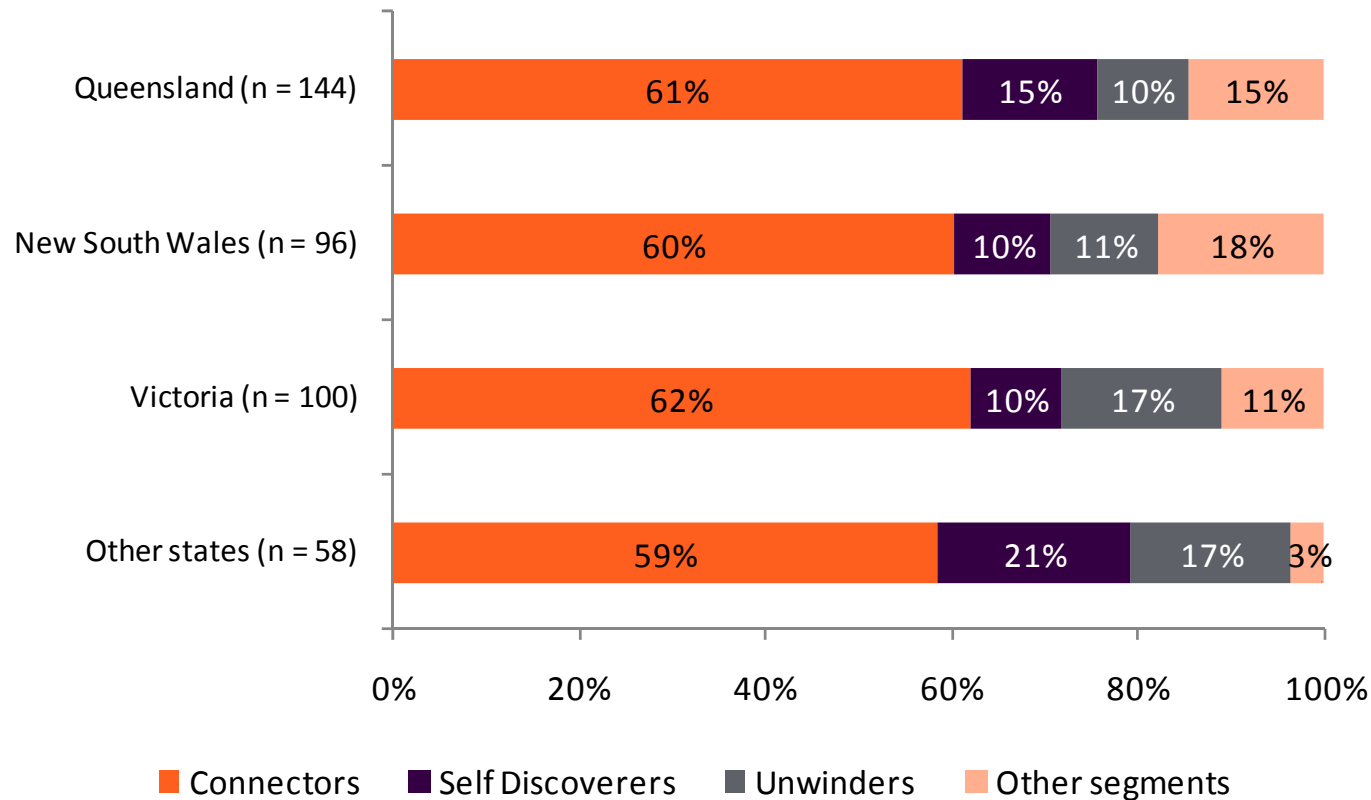
Base = 417

The following question is about your ideal holiday, that is, a holiday you would love to take in the next few years.

The four people within each group represent similar personalities and therefore holiday preferences.

The personalities that you see differ between groups. Which of these six groups of people do you feel would have the same ideal holiday as you?

Connectors were just as likely to reside in areas outside Queensland



"In which State or Territory do you reside?"

The following question is about your ideal holiday, that is, a holiday you would love to take in the next few years.

The four people within each group represent similar personalities and therefore holiday preferences.

The personalities that you see differ between groups. Which of these six groups of people do you feel would have the same ideal holiday as you?

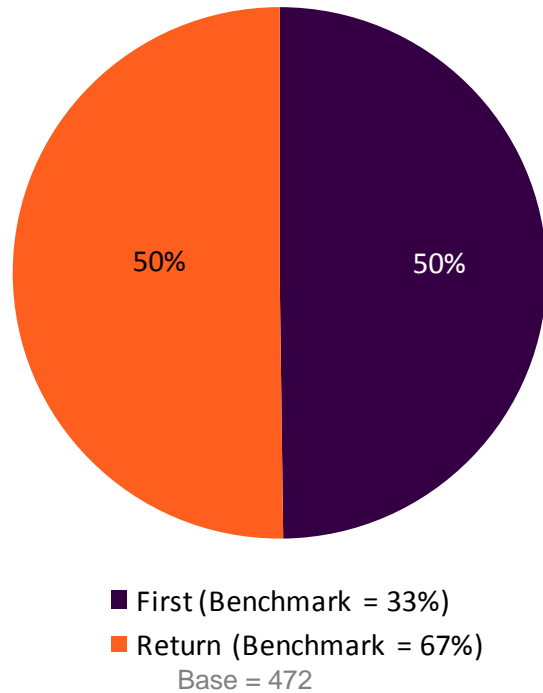
Summary

- The majority of visitors were in the QOCW region for a holiday (94%).
- Over three quarters (78%) of visitors were 55 years or older.
- Most of the older visitors were retired, with 66% of visitors in the older non-working life stage – this was a higher proportion than the VPS benchmark.
- Nearly seven in ten visitors travelled as a couple – also a higher proportion than the VPS benchmark.
- About 63% of visitors were interstate visitors – these visitors were mainly from Victoria and New South Wales.
- About 61% of visitors were from the Tourism Queensland Connector market – most of these were interstate visitors.

Trip planning and booking

- Past visitation
- Planning period
- Information sources
- Booking information

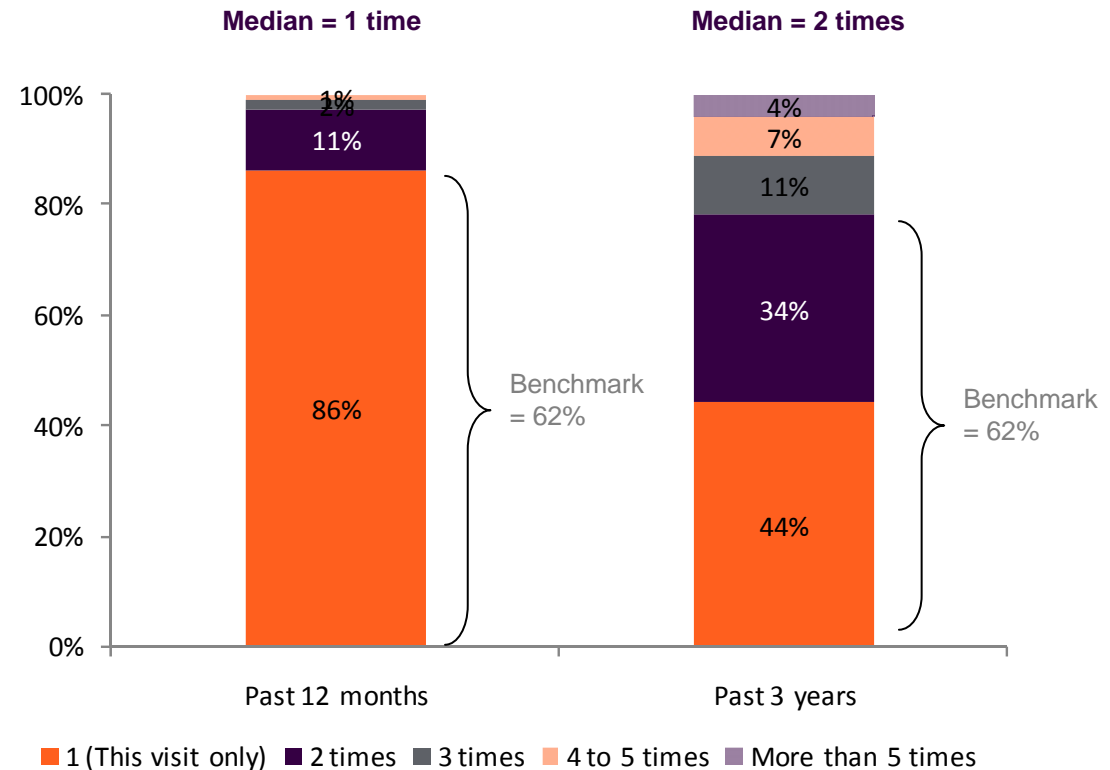
Half the visitors hadn't visited the region before, well above the VPS benchmark



A higher proportion of interstate visitors were first time visitors (53%) than intrastate visitors (40%).

The proportion of first time visitors is above both the VPS benchmark (17 points above) and subgroup (8 points above).

"Was this the first time you had visited the Central West region including both day trips and overnight trips?"



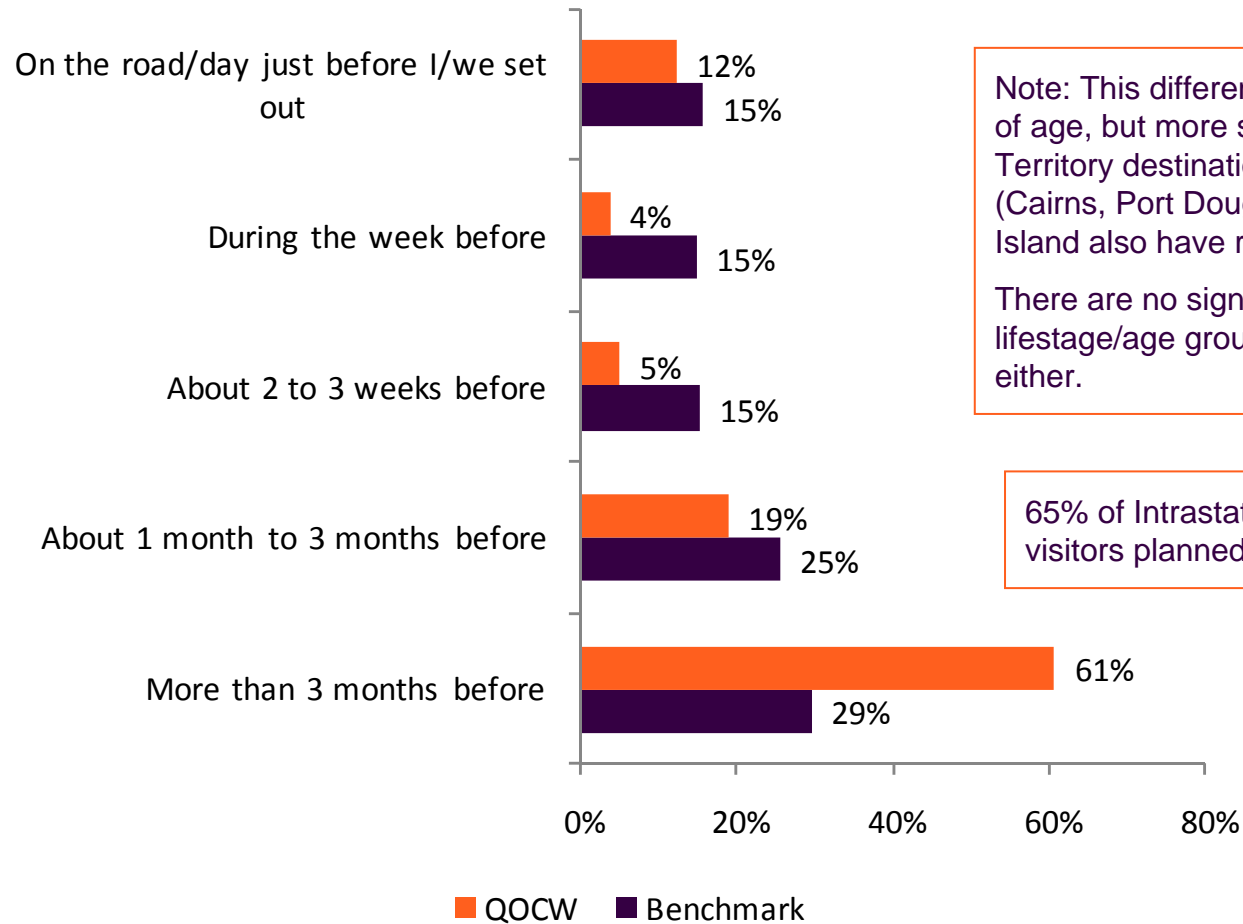
In terms of the number of times visited, there were no differences between interstate and intrastate visitors

Base = 237

Base = 227

"How many times have you visited the Central West region, including both day trips and overnight trips"

Relatively long planning periods compared with the VPS benchmarks

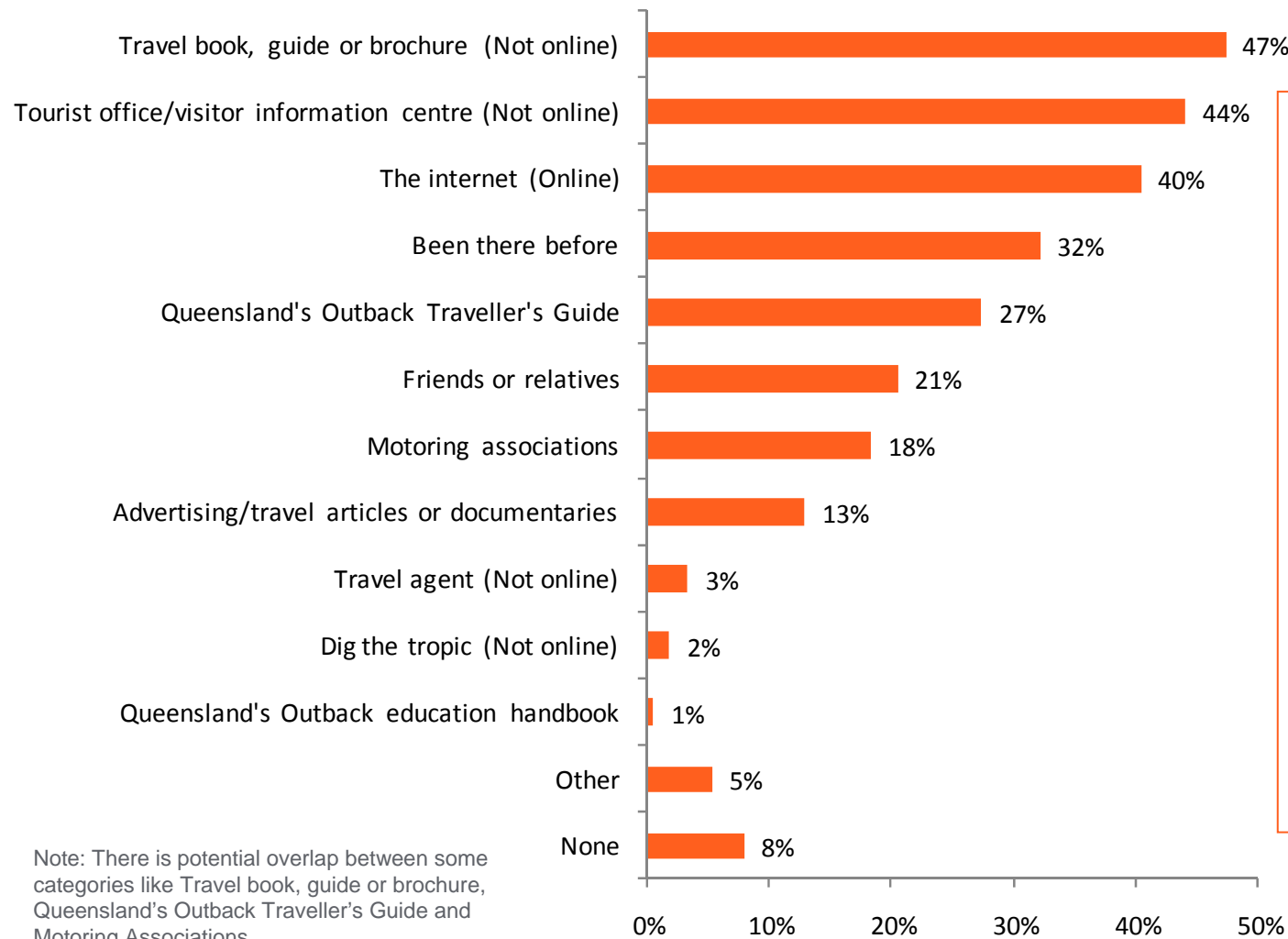


Note: This difference does not seem to be a function of age, but more so of location and distance. Northern Territory destinations, Tropical North Queensland (Cairns, Port Douglas and Atherton) and Lord Howe Island also have relatively long planning periods.

There are no significant differences between lifestage/age group and planning times for QOCW either.

65% of Intrastate visitors and 60% of Interstate visitors planned more than 3 months in advance.

Travel books, guides and brochures were the most common information source used



Note: There is potential overlap between some categories like Travel book, guide or brochure, Queensland's Outback Traveller's Guide and Motoring Associations.

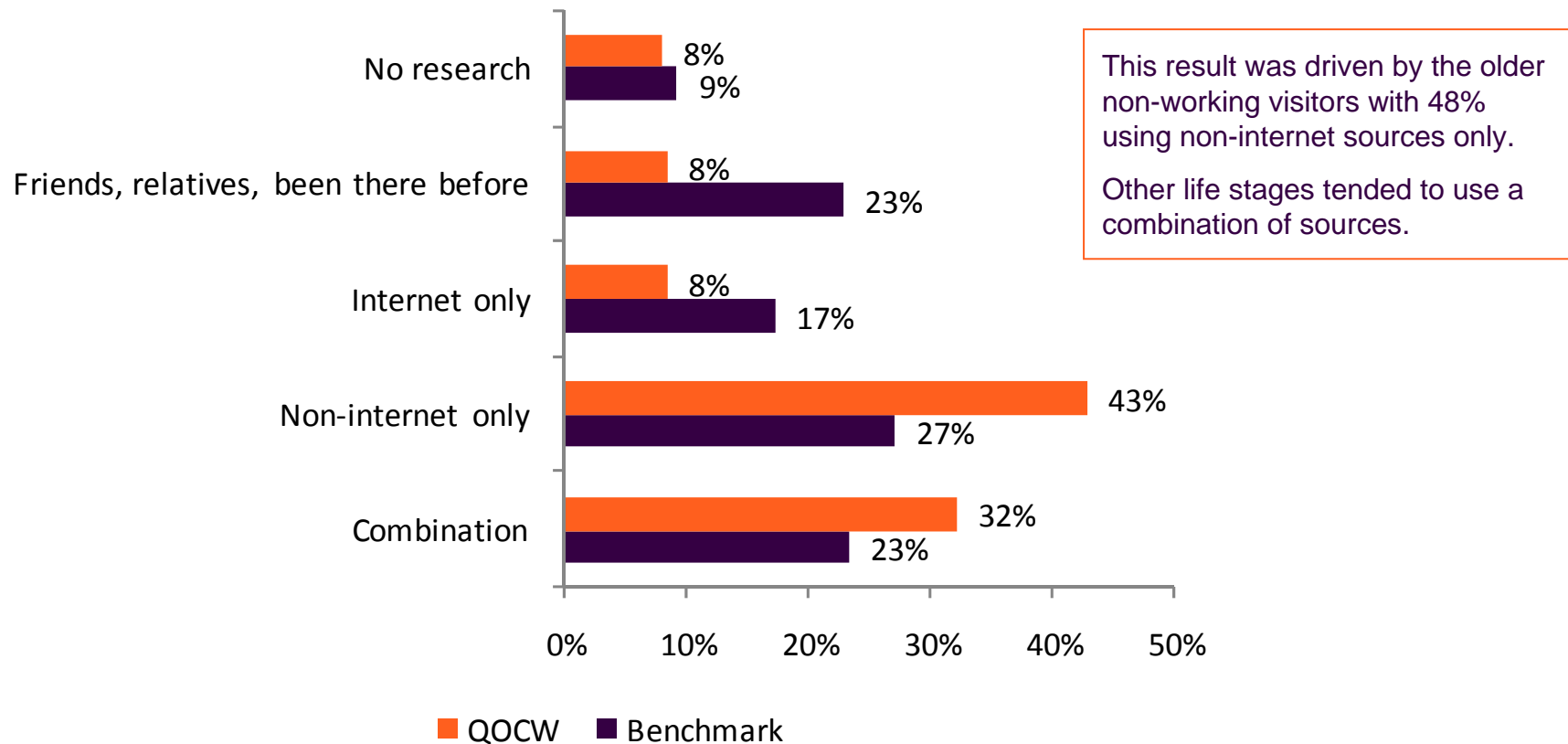
Visitor's usage of non-online sources, motoring associations and advertising/travel articles were above the VPS benchmarks.

- Travel book: 26 points above VPS benchmark and similar to subgroup
- Advertising/travel articles: 4 points above VPS benchmark and similar to subgroup
- Tourist office: 26 and 19 points above respectively
- Motoring associations: 9 and 8 points above respectively

Base = 463

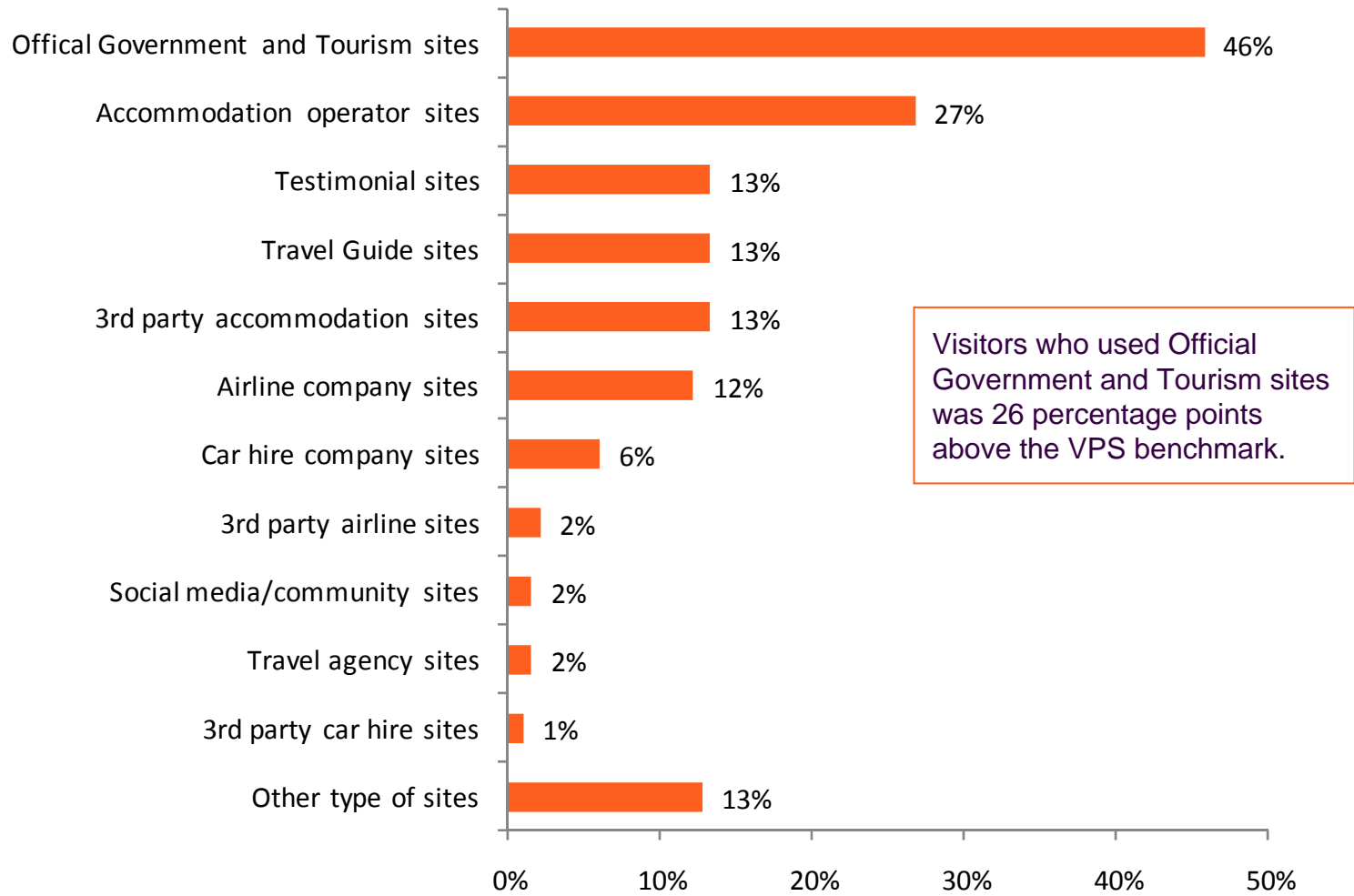
'Which of the following did you use to obtain information for this trip to the Central West region?'

Traditional non-internet information sources were the most popular sources although internet was still used by 4 in 10 visitors



Note: 'Friends, relatives, been there before' may be used in combination with other categories (excludes 'No research')

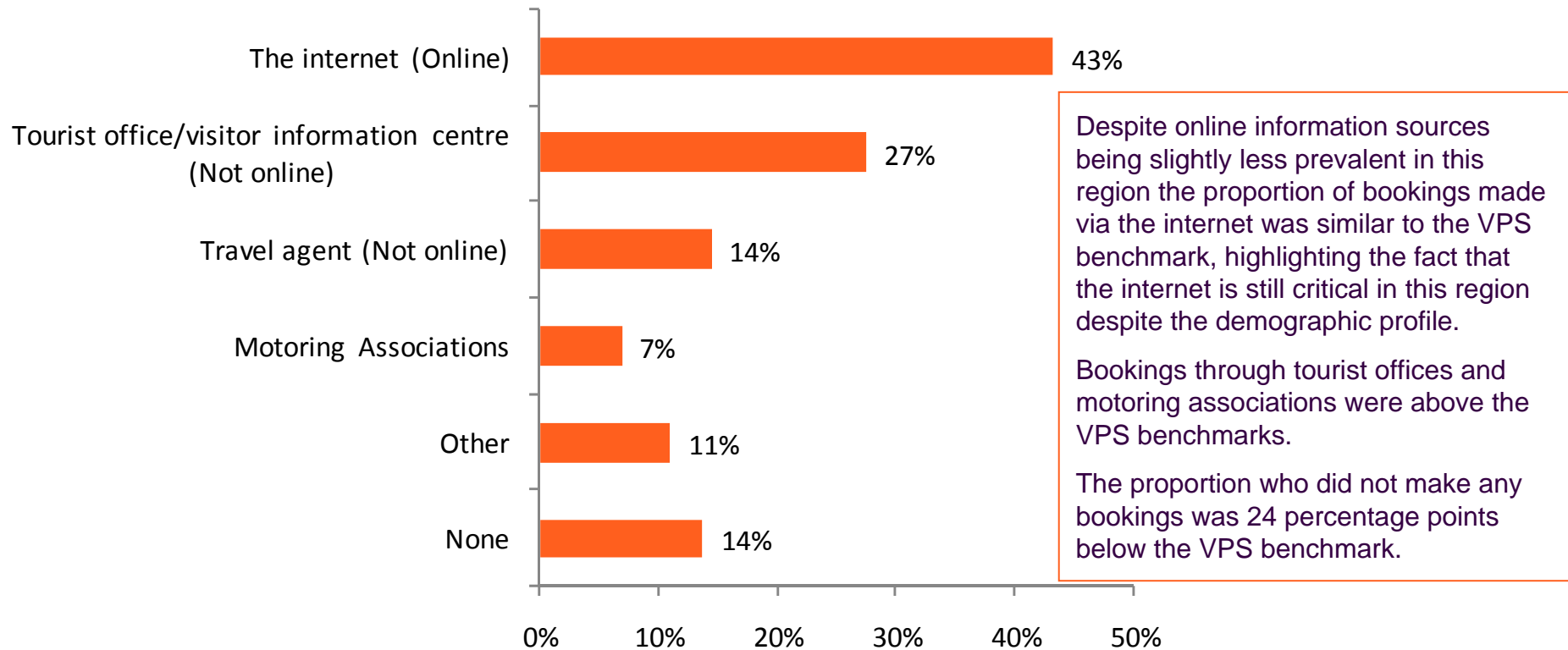
Nearly half of visitors used Official Government and Tourism sites



Base = 179

'You mentioned that you used the internet for research. What are the type of websites you went to?'

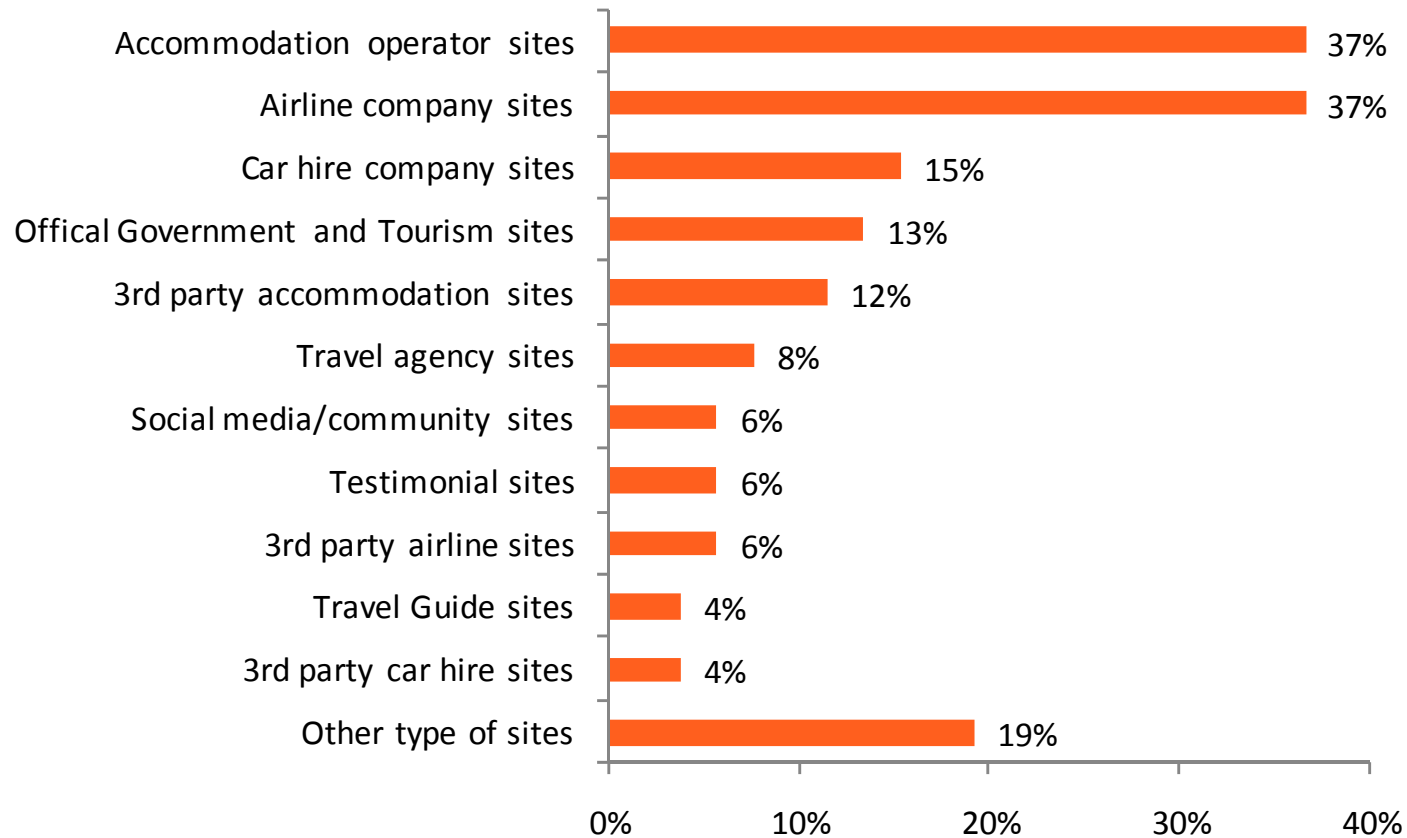
The internet and tourist offices/VICs were the most popular booking methods



Base = 146

'Which of the following did you use to make bookings for this trip to the Central West region?'

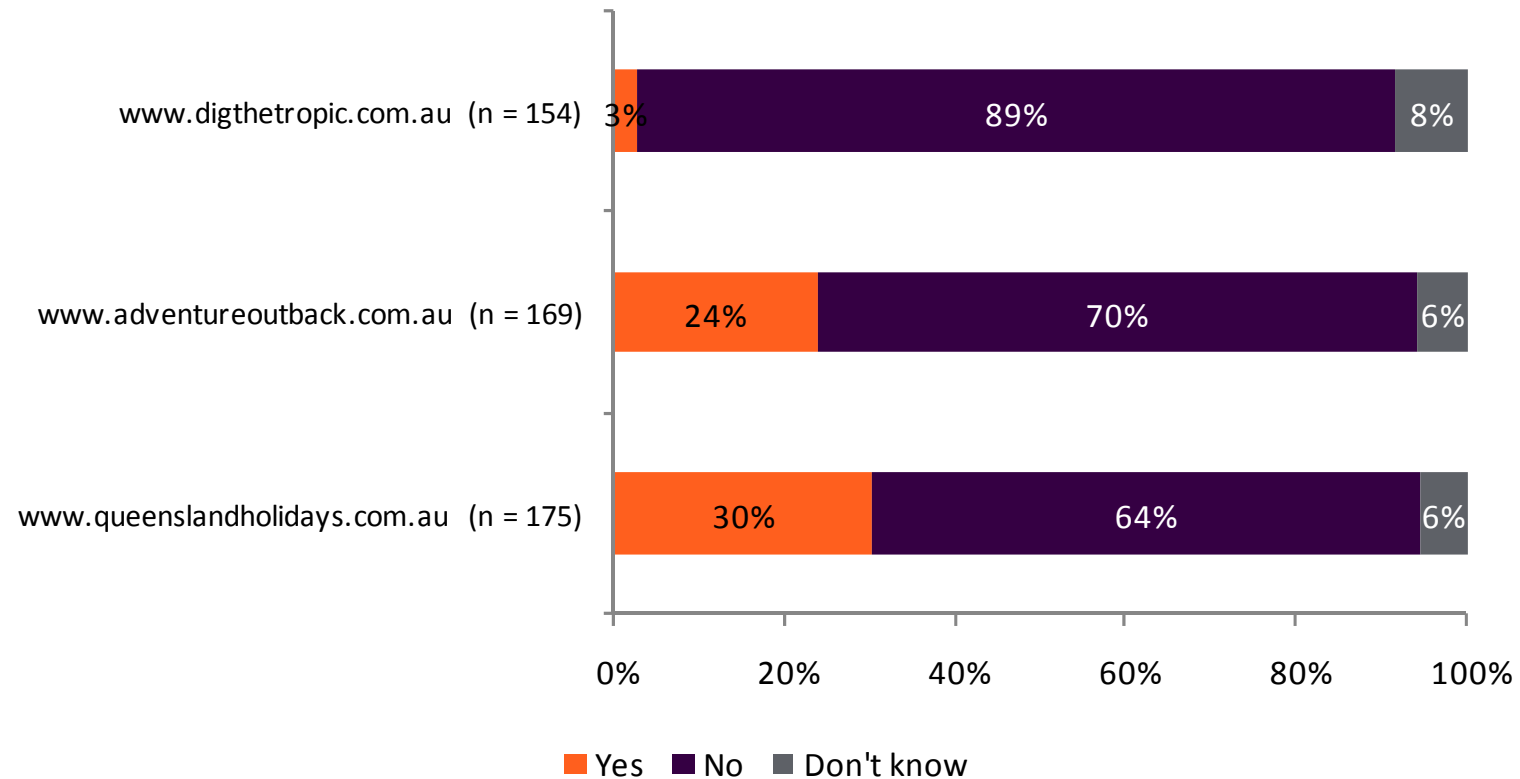
Accommodation operator and airline company sites were the most popular sites used for bookings



Base = 52

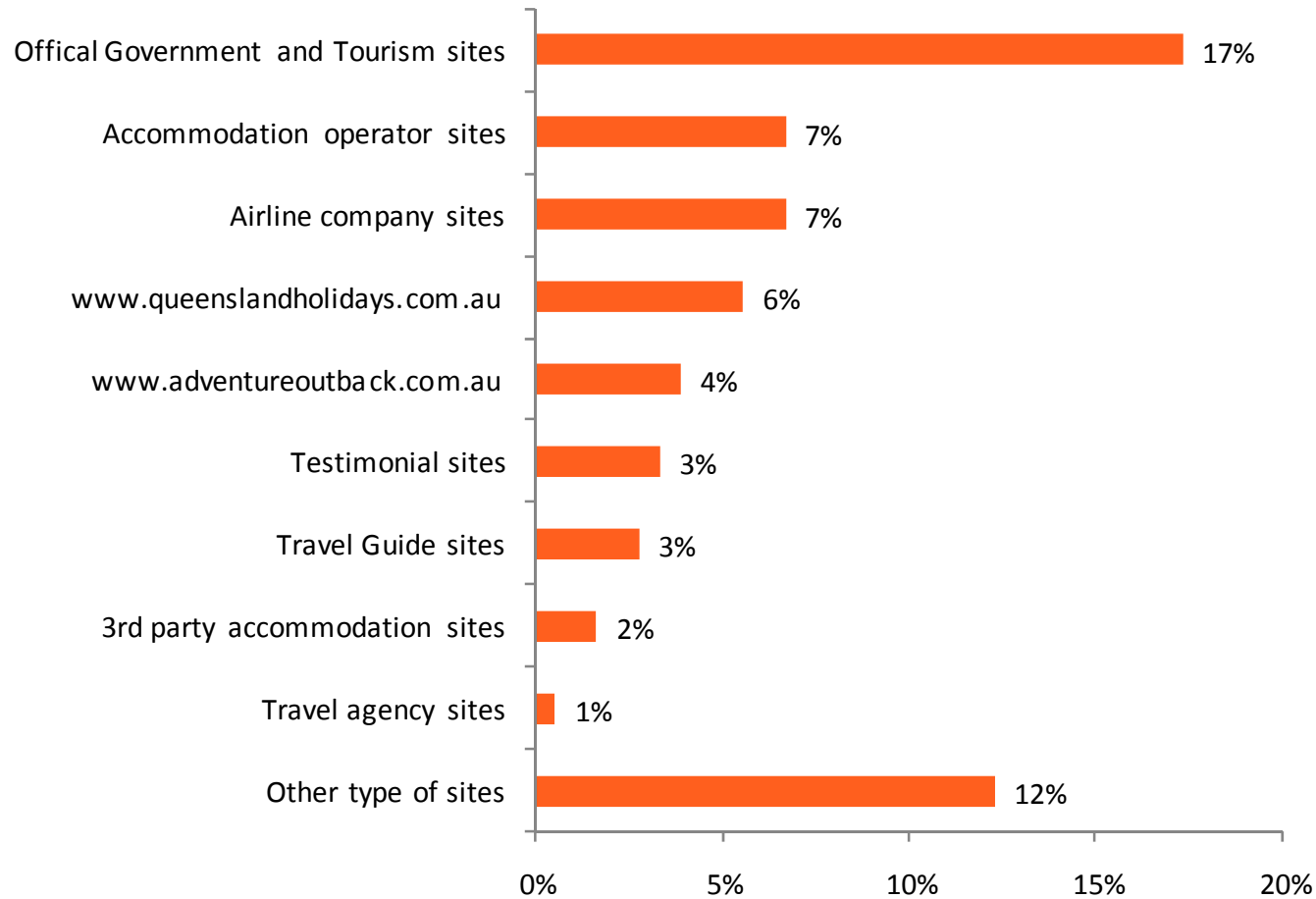
'You mentioned that you used the internet for booking. What are the type of websites you went to?'

Specific websites visited included www.queenslandholidays.com.au



"Did you use any of the following specific websites prior to your trip to the Central West region?"

The most useful website was the Official Government and Tourism sites



"Of the websites you used prior to your trip to the Central West region, which did you find most useful?"

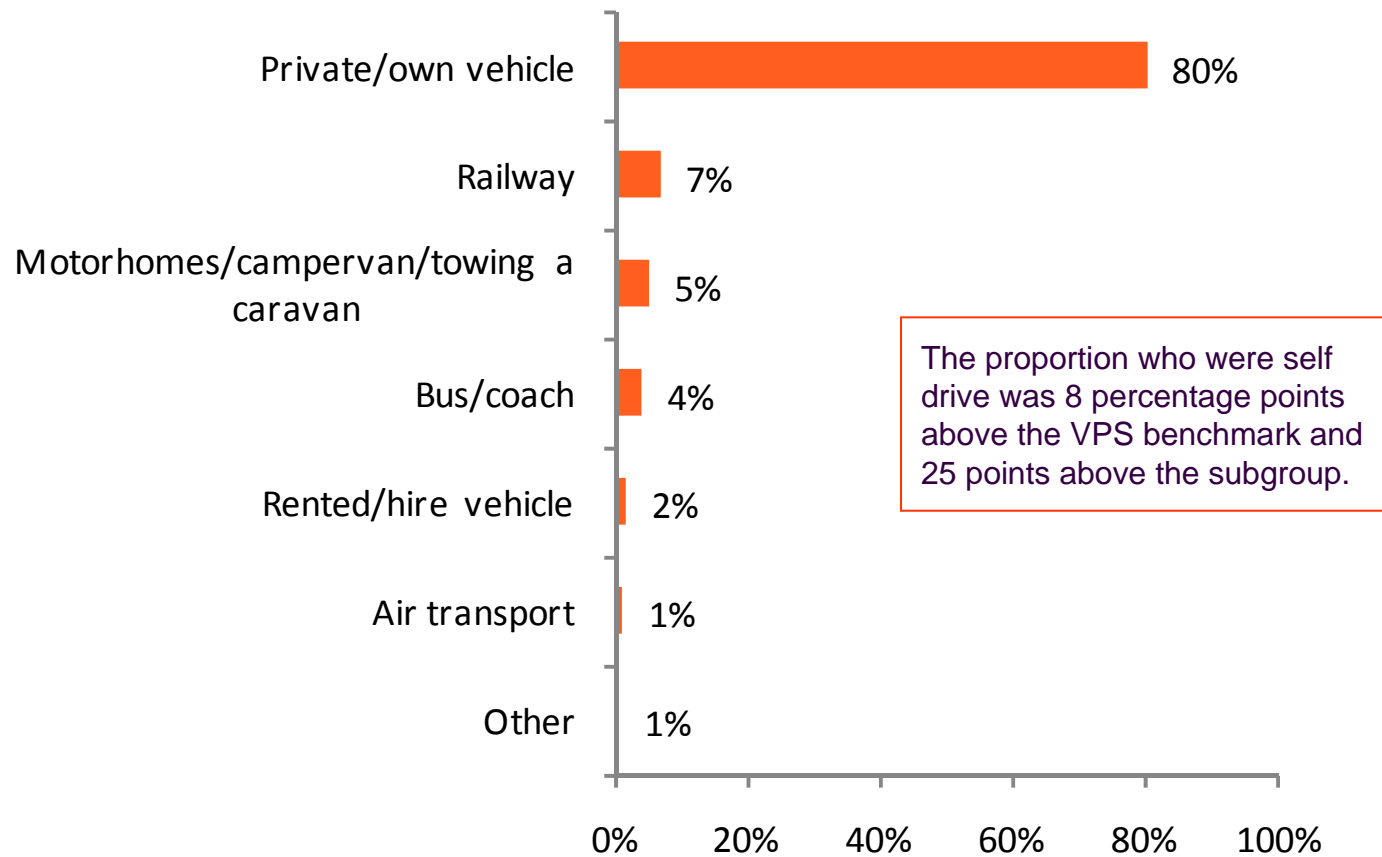
Summary

- Half of visitors were first time visitors, a higher proportion than the VPS benchmark.
- The majority of visitors (61%) planned more than 3 months in advance, a higher proportion than the VPS benchmark.
- Travel books, guides and brochures and tourist offices/Visitor Information Centres (VICs) were the most common information sources. Two in five visitors (43%) used non internet sources only for information, a higher proportion than the VPS benchmark.
- This result was driven by the older non-working visitors with 48% using non-internet sources only.
- Forty per cent of visitors used the internet for information with the most popular site Official Government and tourism sites (46% of internet users). Visitors also thought this site was the most useful.
- In terms of bookings, 43% of visitors made bookings online and 27% through tourist offices/Visitor Information Centres (VICs).
- Accommodation operator sites and Airline company sites were the most popular sites for bookings with 37% of internet bookings made through each of these sites.

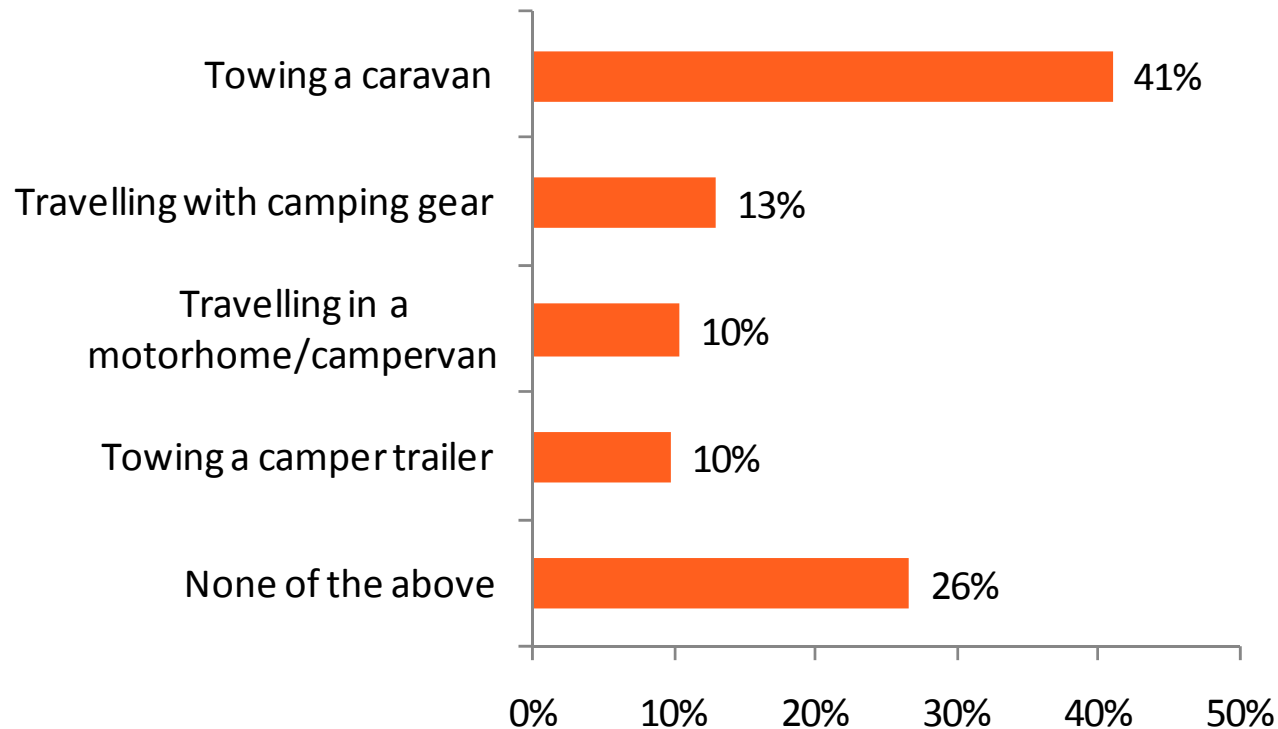
Getting to and around the QOCW region

- Transport used
- Routes taken in and out
- Locations visited

The majority of visitors were self drive



Nearly three quarters travelled with caravan or camping equipment



The highest proportions of visitors less than 45 years either travelled with camping gear (40%) or with no caravan or camping equipment (26%).

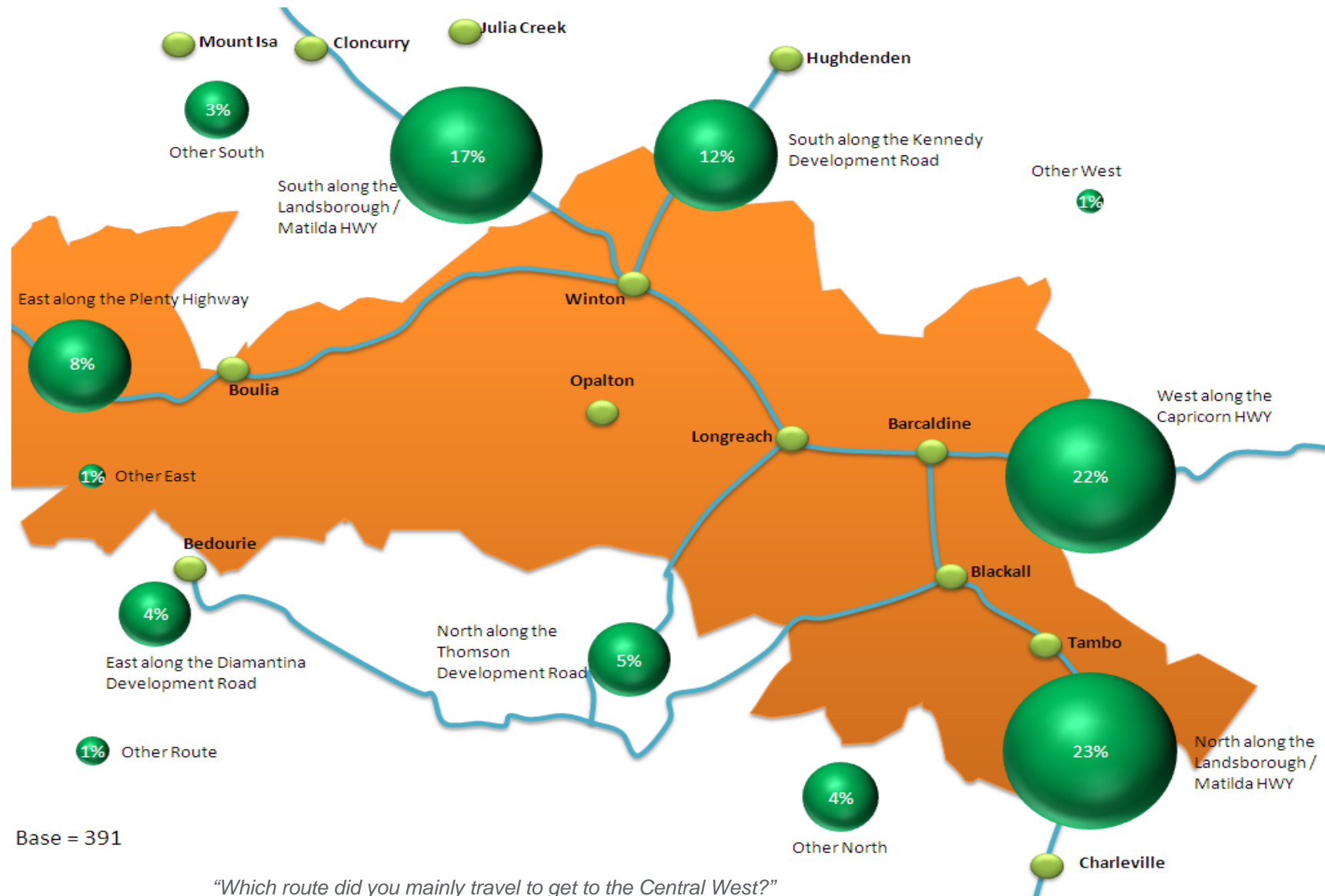
The highest proportions of visitors 45-54 years travelled with no caravan or camping equipment (34%) or towing a caravan (28%).

The highest proportion of visitors 55-64 years were towing a caravan (53%).

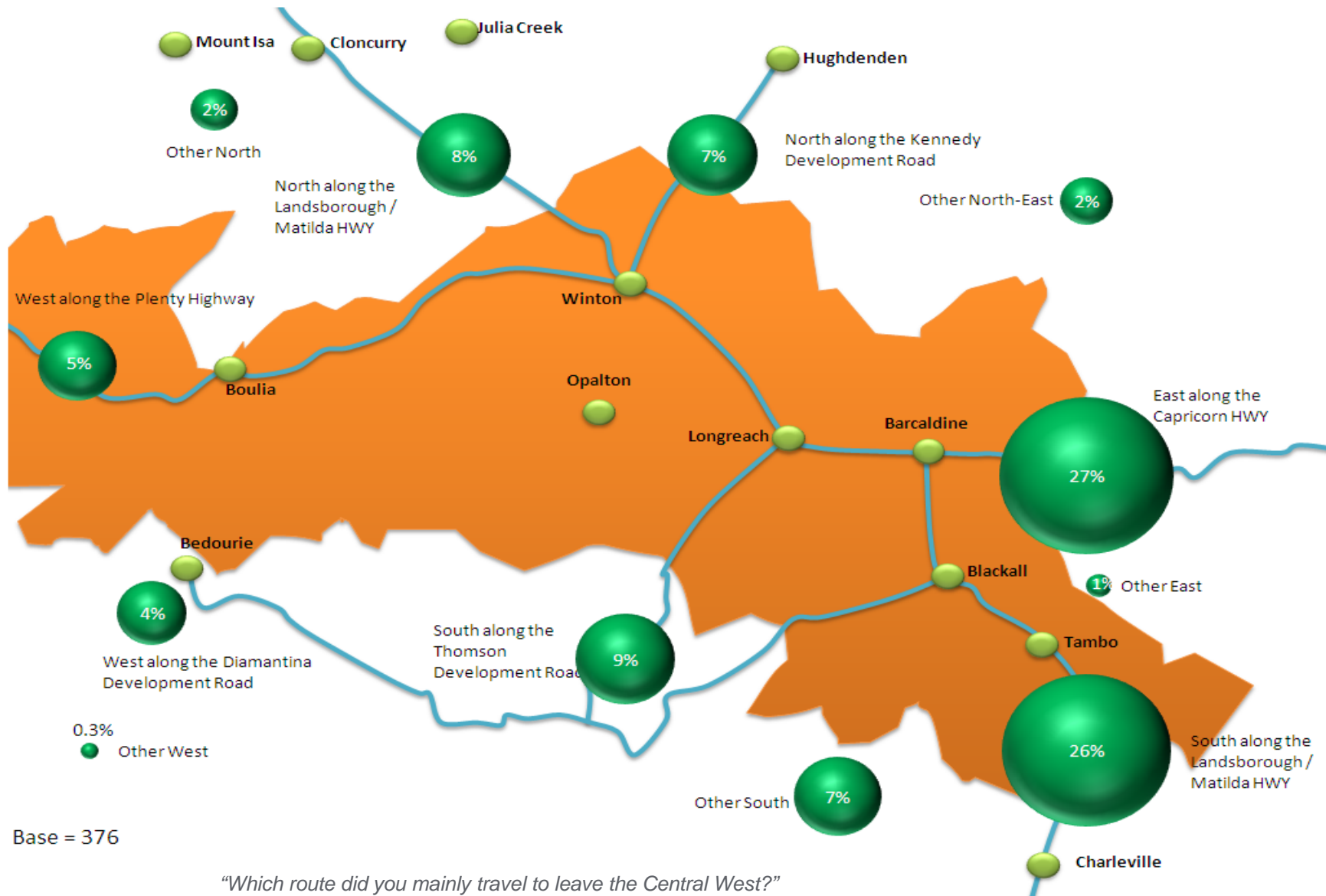
The highest proportions of visitors 65 years or over were either towing a caravan (39%) or travelling with no caravan or camping equipment (36%).

The Connector market displayed a similar trend.

Routes used to get to the QOCW region



Routes used to leave the QOCW region



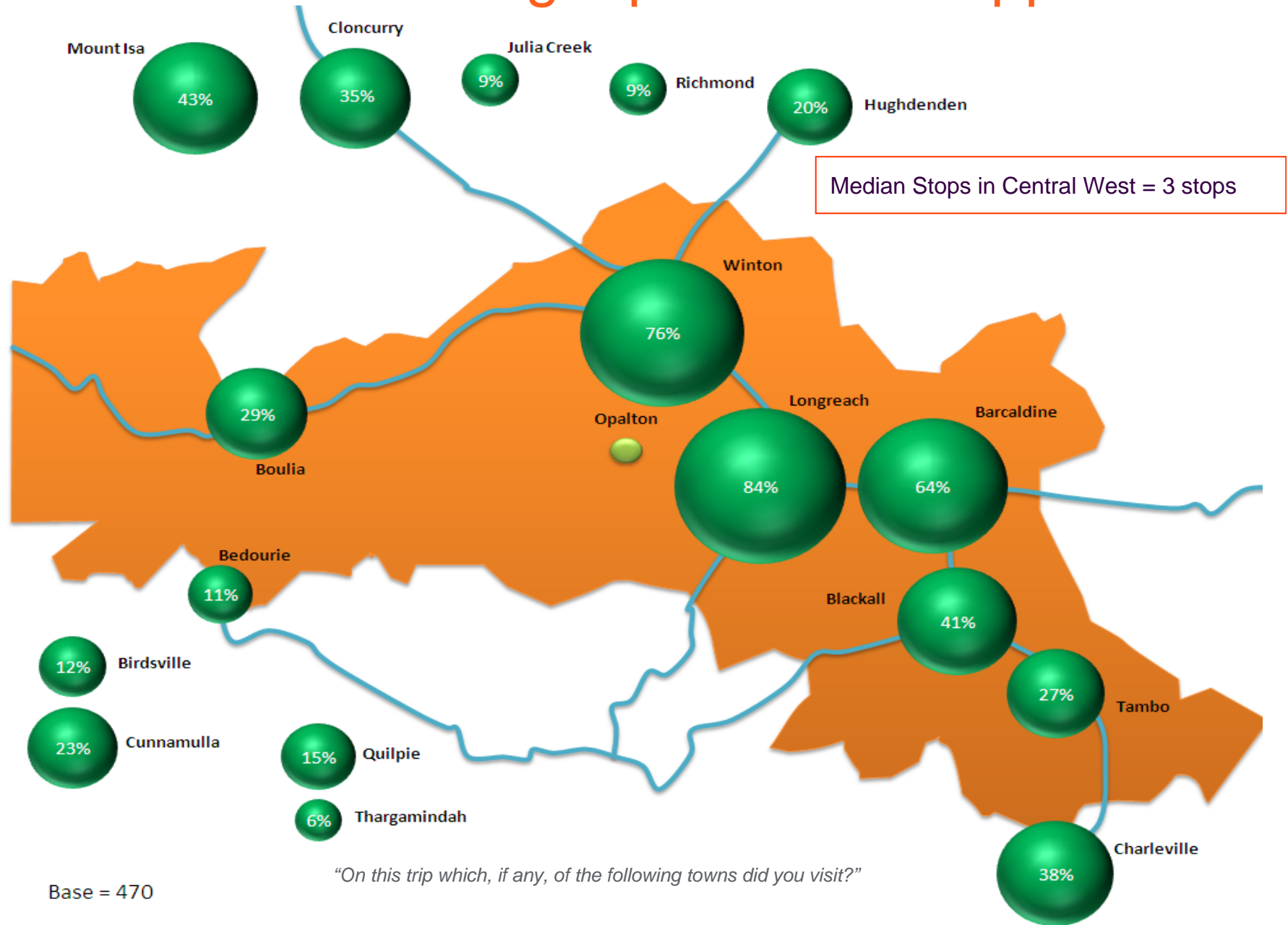
Towns visited during trip – passed through



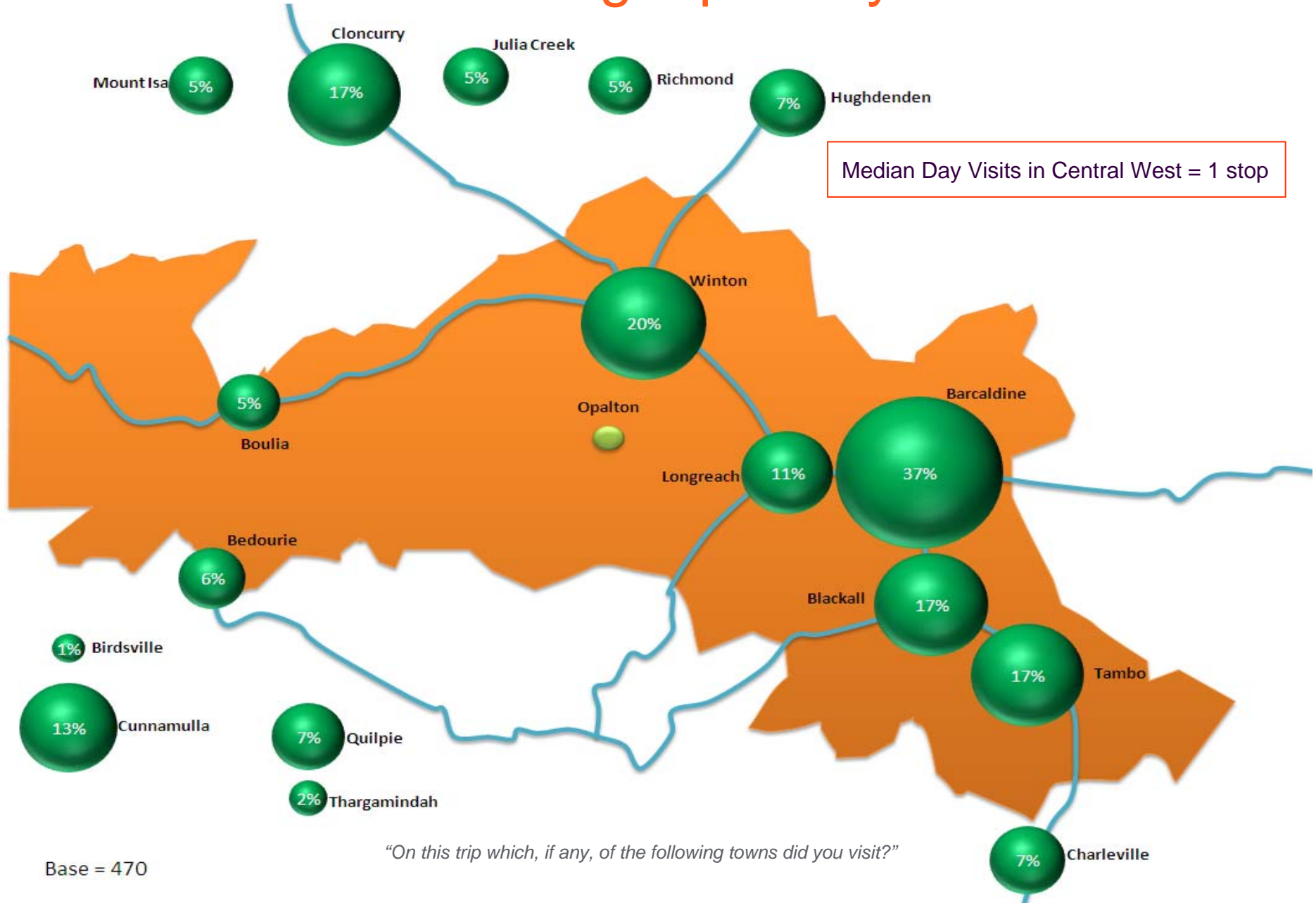
Base = 470

"On this trip which, if any, of the following towns did you visit?"

Towns visited during trip – towns stopped at



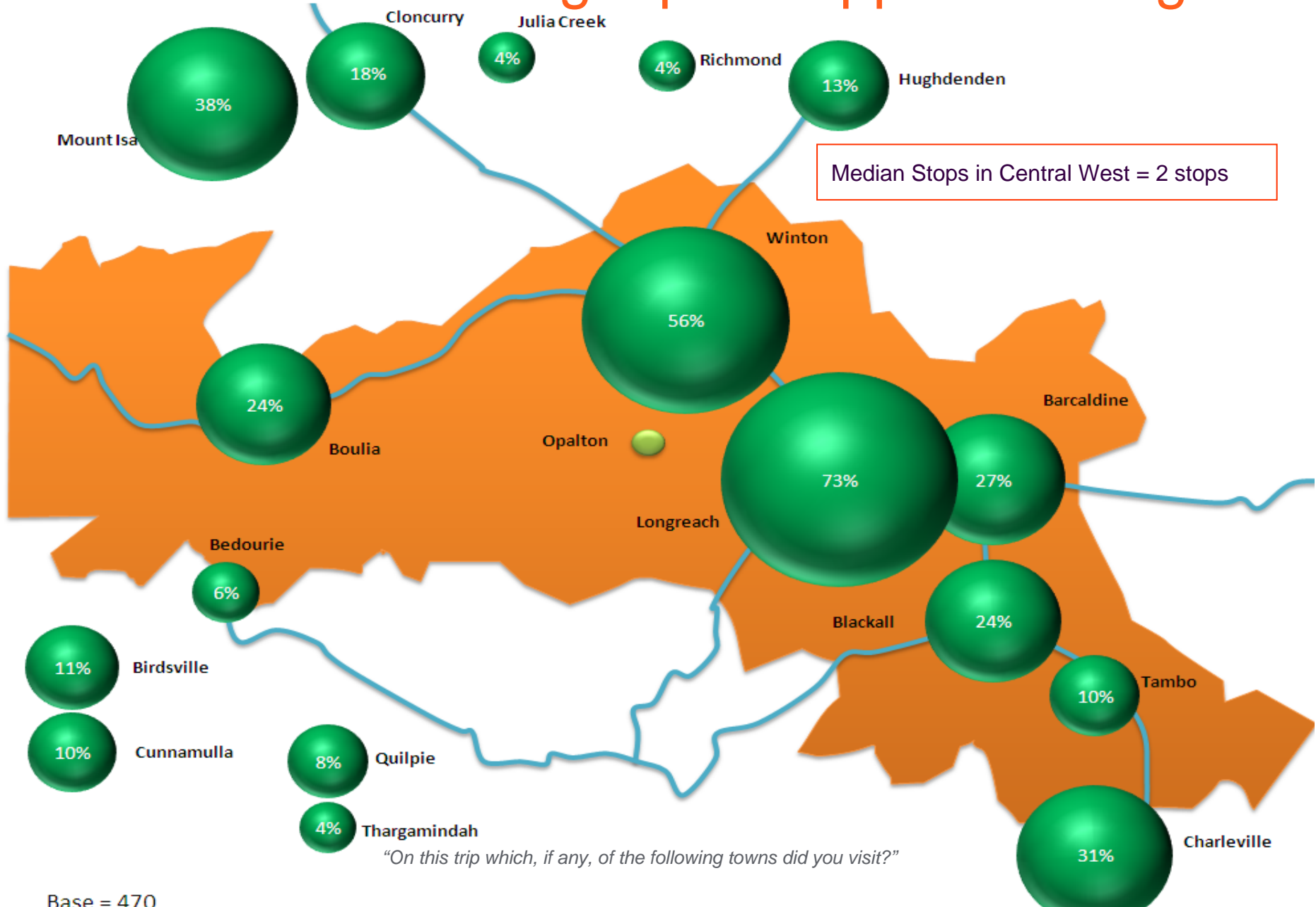
Towns visited during trip – day visit



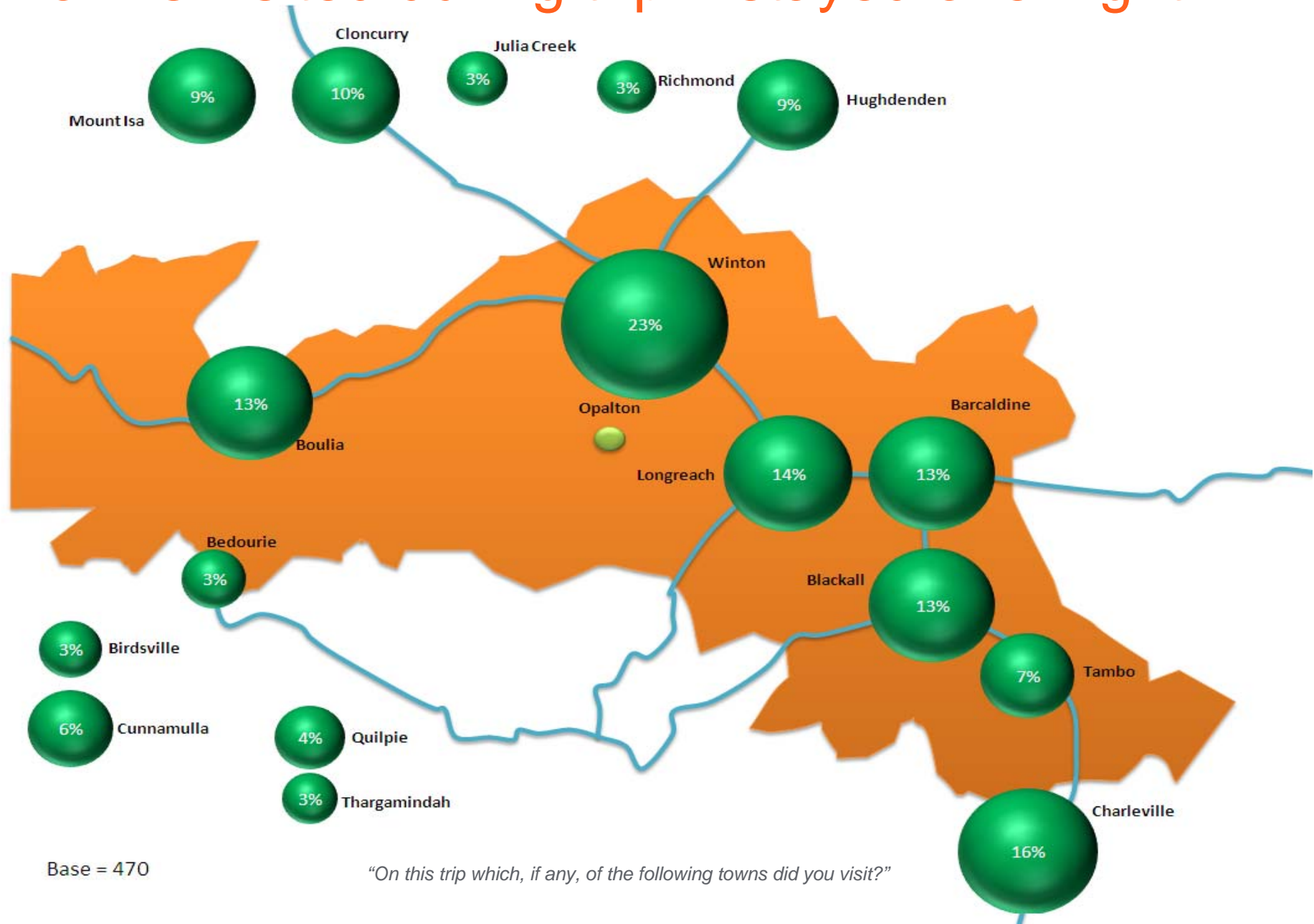
Base = 470

"On this trip which, if any, of the following towns did you visit?"

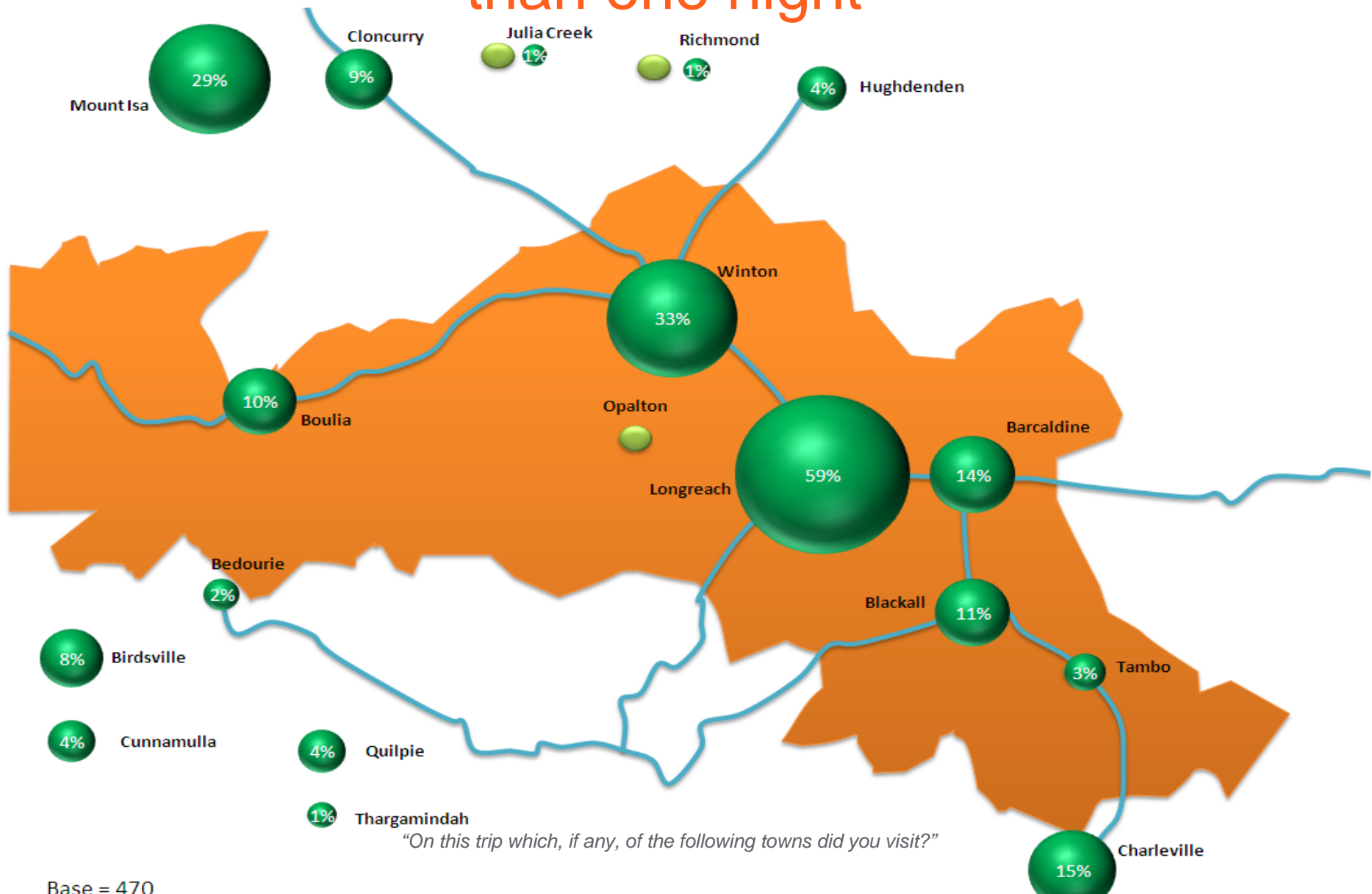
Towns visited during trip – stopped overnight



Towns visited during trip – stayed one night



Towns visited during trip – stayed more than one night



Base = 470

"On this trip which, if any, of the following towns did you visit?"

Summary

- The majority of visitors (87%) to the region were self drive, a higher proportion than the VPS benchmark (78%).
- Nearly three quarters of visitors travelled with caravan or camping gear, 41% of visitors were towing a caravan.
- Over half (53%) of visitors 55 to 64 years were towing a caravan.
- North along the Landsborough/Matilda Highway (23%), West along the Capricorn Highway (22%) and South along the Landsborough/Matilda Highway (17%) were the most common routes to the region.
- East along the Capricorn Highway (27%) and South along the Landsborough/Matilda Highway (26%) were the most common routes from the region.

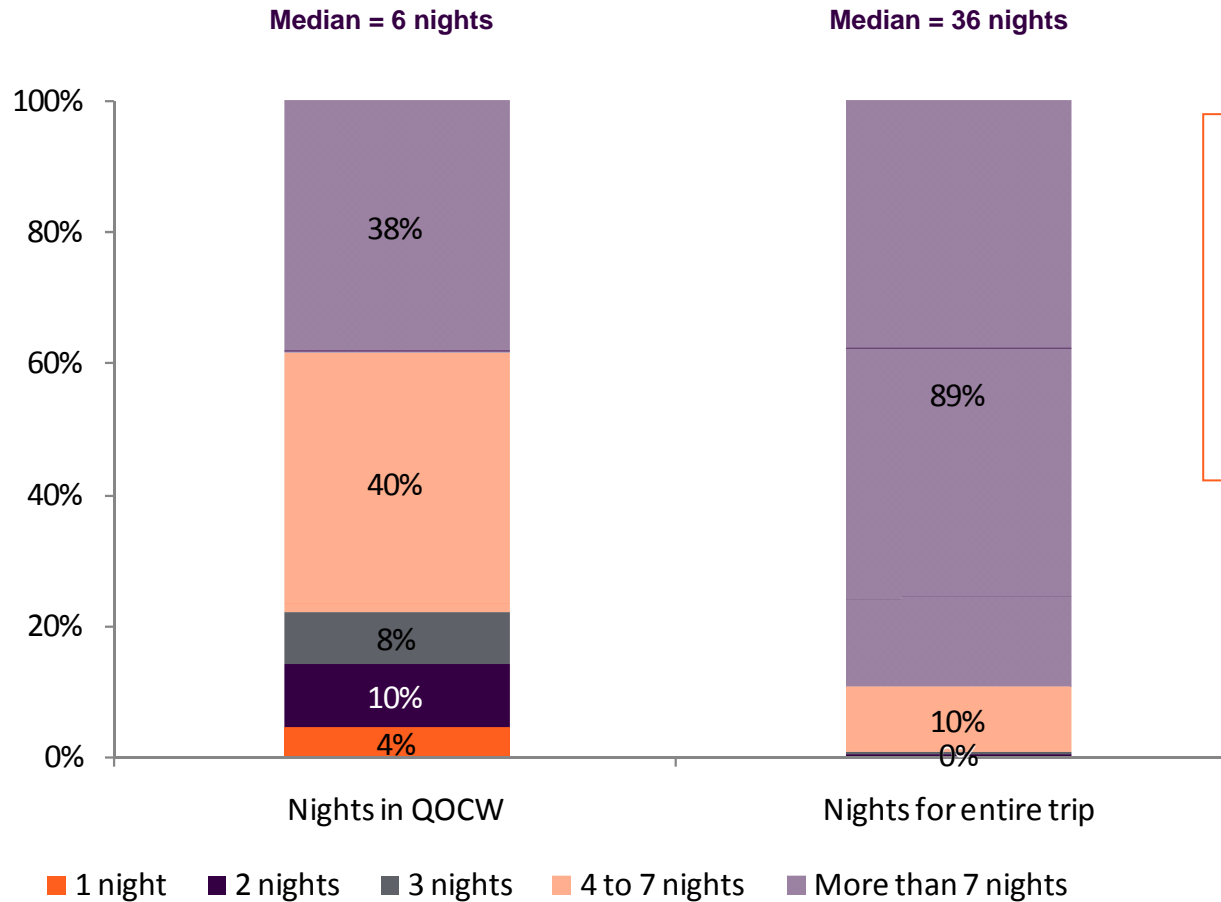
Summary

- The median number of stops in the QOCW region (includes day and overnight stops) by visitors was 3 stops. There was no difference between visitor types (based on accommodation used).
- The median number of overnight stops in the QOCW region was 2 overnight stops. The exception was visitors who did not use caravan or camping accommodation with the median 1 overnight stop for these visitors.
- Barcaldine was the most common town to stop at for a day visit with 37% of visitors stopping there for a day visit – this was the case for all visitor types.
- Winton was the most common town to stop at for one night with 23% of visitors staying in Winton for one night – this was the case for all visitor types.
- Longreach was the most common town to stop at for more than one night with 59% of visitors staying there for more than one night – this was the case for all visitor types.

Staying in the QOCW region

- Length of stay
- Accommodation used
- Profile of different accommodation users
- Expenditure

The majority of visitors stayed more than 4 nights in the region



Base = 464

Base = 460

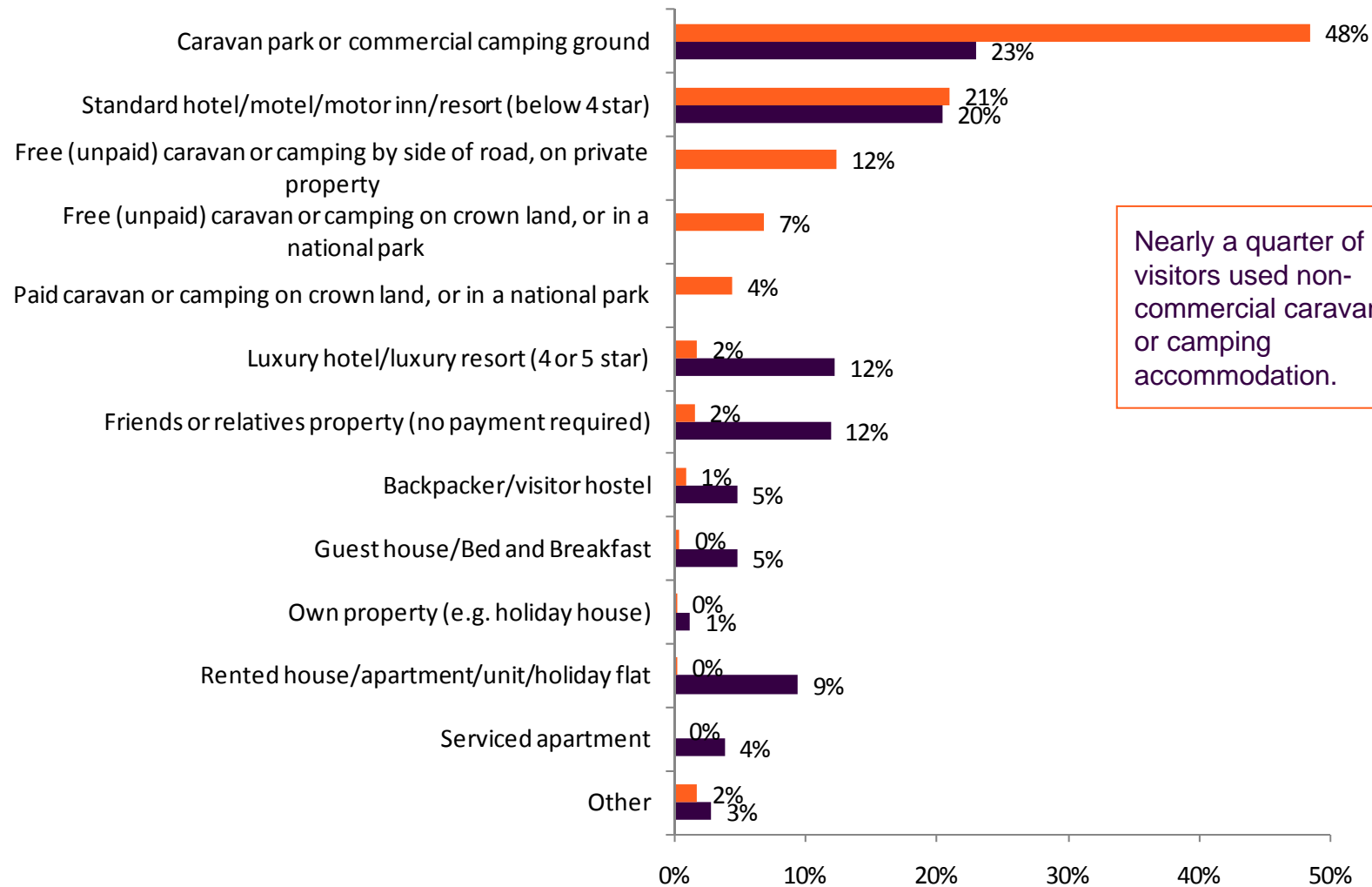
"How many nights did you stay in the Central West region during this trip?"

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

78% of visitors stayed 4 or more nights - 41 points above the VPS benchmark and 38 points above the subgroup.

The median stay in QOCW for Connectors was 5.5 nights.

Caravan or camping in the QOCW region was the main accommodation used



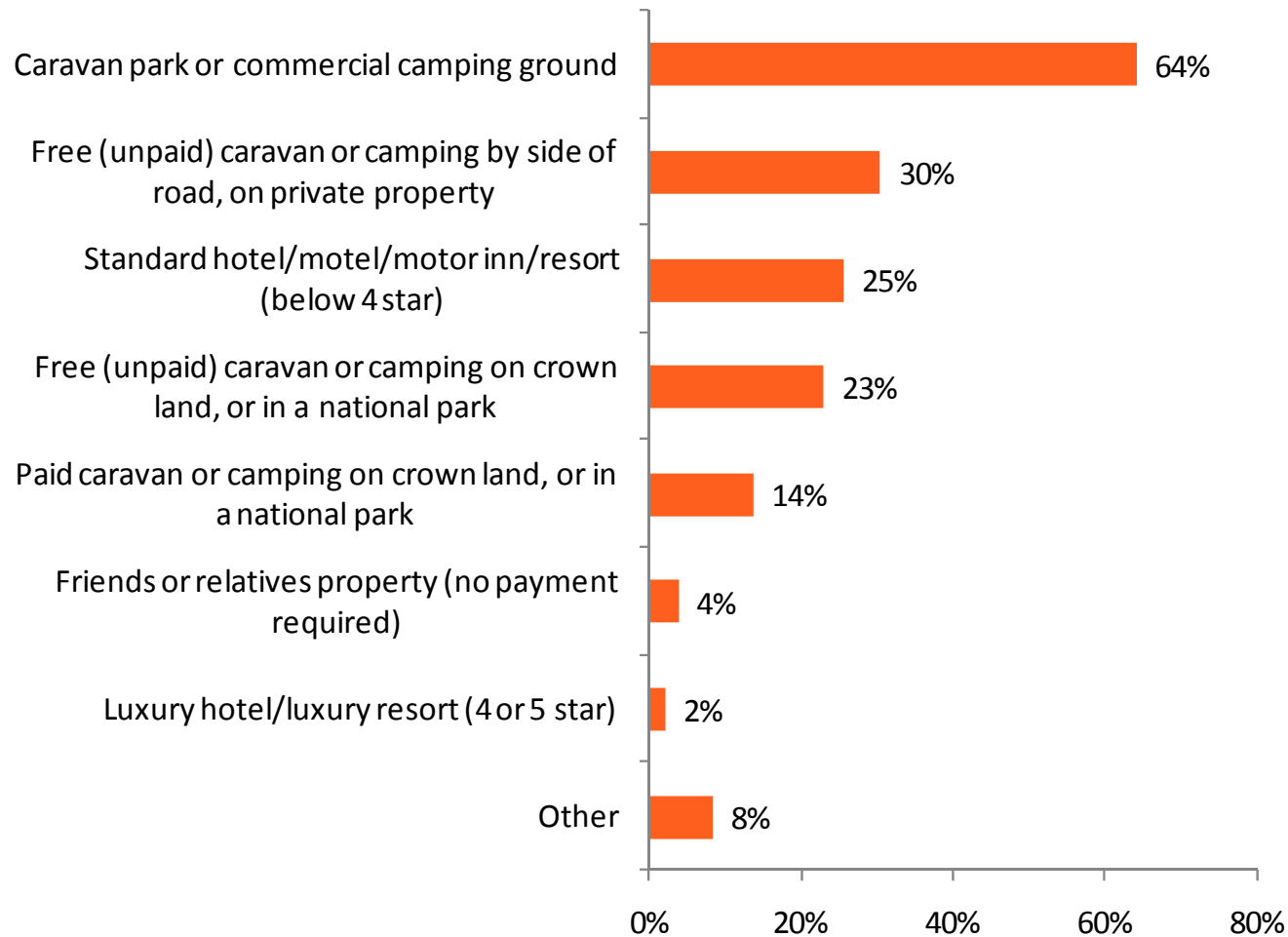
Nearly a quarter of visitors used non-commercial caravan or camping accommodation.

Base = 452

QOCW Benchmark

“What type of accommodation did you mainly use in the Central West region?”

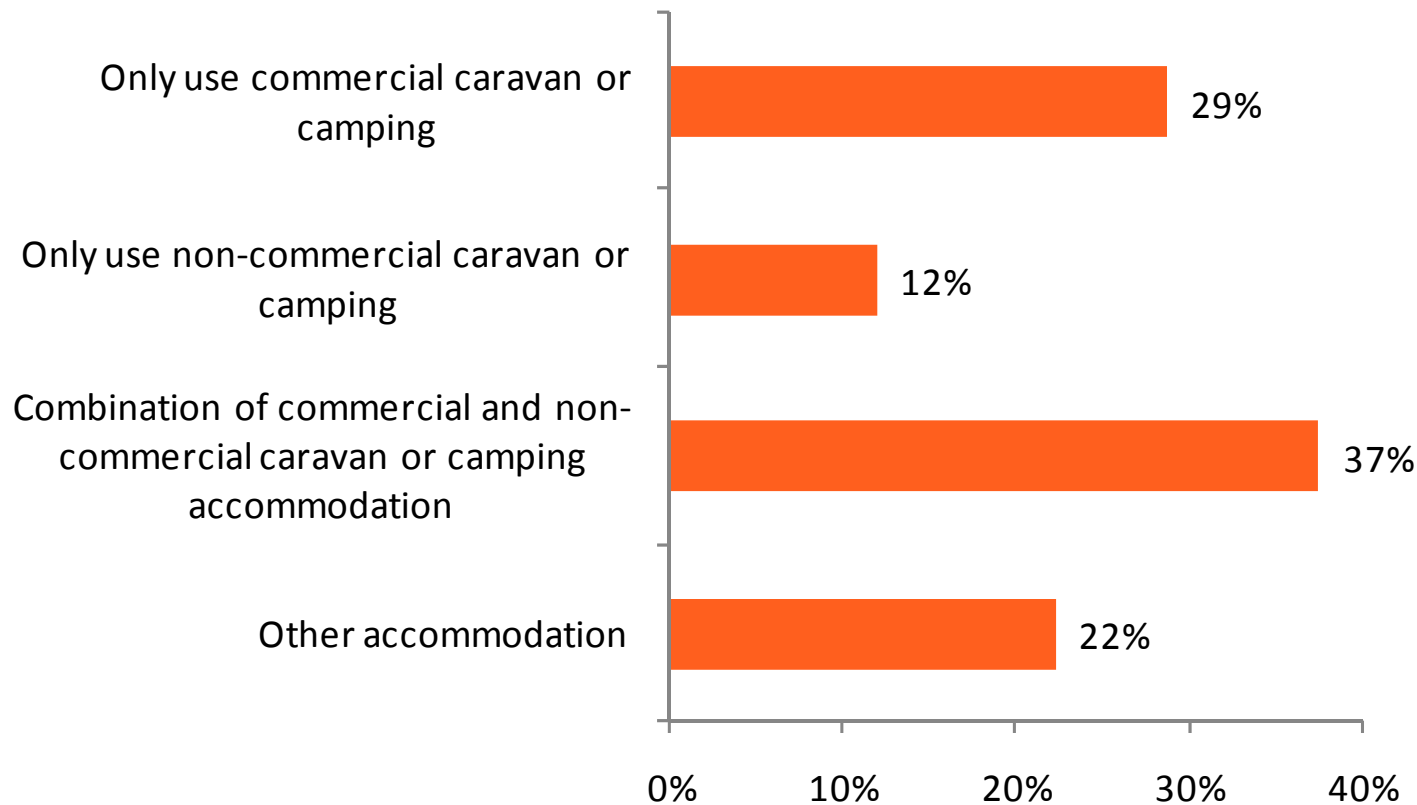
The majority of visitors used commercial caravan or camping accommodation for part of their stay in QOCW



Base = 465

"What types of accommodation did you use in the Central West region during your trip?"

Nearly two in five visitors used a combination of commercial and non-commercial caravan or camping options during their stay in QOCW



Base = 465

Non-commercial caravan or camping includes those who paid to stay on at a national park or on crown land

“What types of accommodation did you use in the Central West region during your trip?”

Profile of different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Age group:	(n = 124)	(n = 52)	(n = 164)	(n = 100)
• Less than 45 years	6%	23%	9%	10%
• 45 to 64 years	60%	50%	57%	39%
• 65 plus years	34%	27%	34%	51%
Older non working	67% (n = 122)	58% (n = 48)	69% (n = 158)	63% (n = 94)
Interstate	74% (n = 128)	59% (n = 54)	69% (n = 168)	43% (n = 94)
Connectors	58% (n = 115)	57% (n = 46)	63% (n = 155)	64% (n = 95)

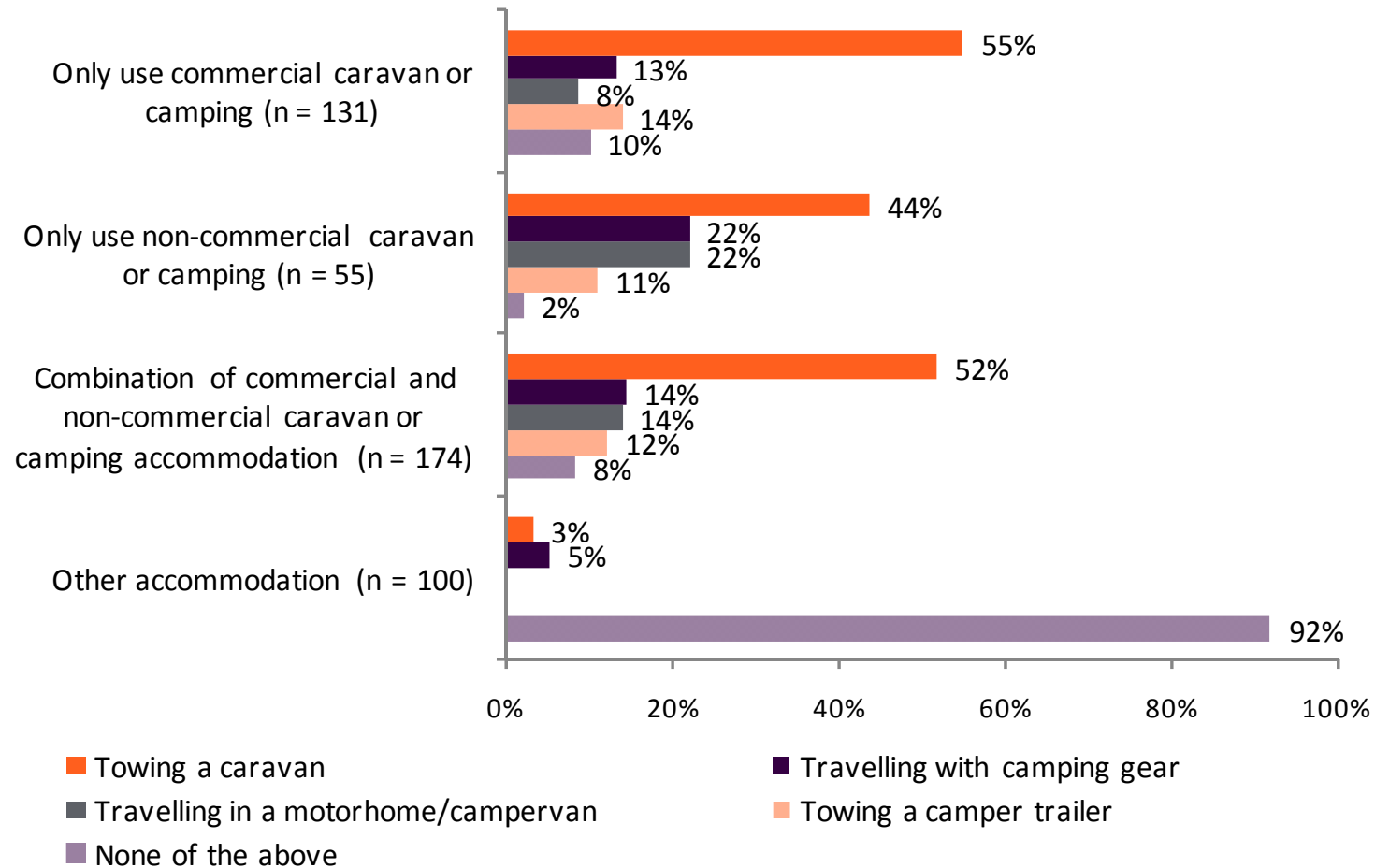
Profile of different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
First time visitor	57% (n = 133)	35% (n = 55)	48% (n = 173)	51% (n = 102)
Travel party - Partner	76% (n = 133)	73% (n = 55)	73% (n = 172)	50% (n = 101) 18% travelled with friends/relatives
Length stay in region (Nights)	Mean = 7 Median = 6 (n = 131)	Mean = 14 Median = 6 (n = 54)	Mean = 11 Median = 8 (n = 169)	Mean = 5 Median = 4 (n = 102)

Profile of different accommodation users

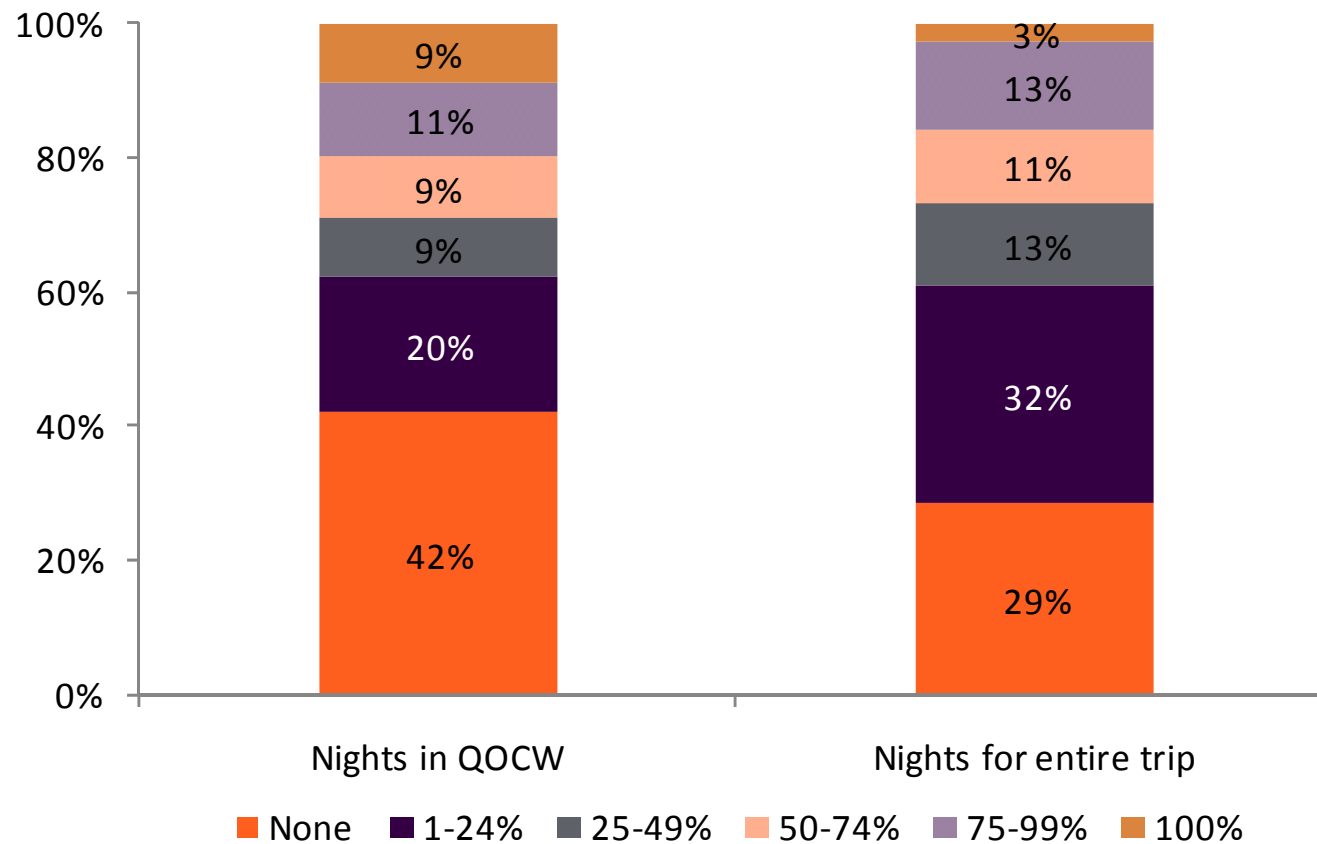
	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Used the following sources for information:	(n = 130)	(n = 53)	(n = 173)	(n = 99)
• Travel guide, book or brochure	55%	51%	51%	31%
• Tourist office/visitor information centre	48%	42%	54%	26%
• Motoring associations	20%	11%	23%	11%
Used the internet for information	35% (n = 130)	28% (n = 53)	43% (n = 173)	47% (n = 99)
Made bookings on the internet	41% (n = 29)	20% (n = 10)	40% (n = 45)	49% (n = 59)

A smaller proportion of non-commercial caravan or camping visitors did not tow a caravan compared with other visitors



“What types of accommodation did you use in the Central West region during your trip?”
“Which of the following best describes your trip to the Central West?”

More than half of caravan or camping visitors spent some nights at free caravan or camping sites during their whole trip

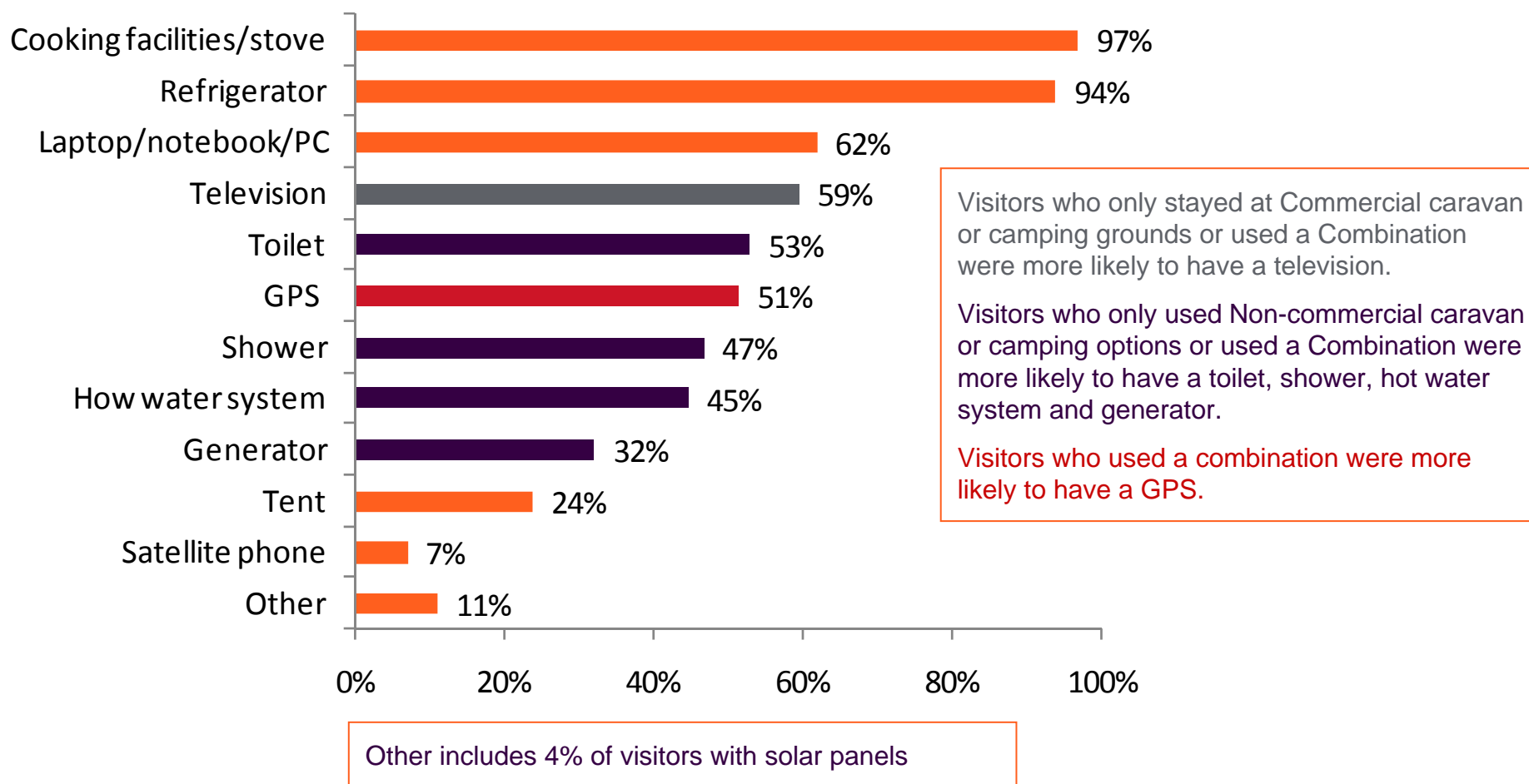


Base = 338

Base = 339

“What proportion of your total nights in the Central West were at free (unpaid) caravan or camping sites?”
“What proportion of your total nights away from home were at free (unpaid) caravan or camping sites?”

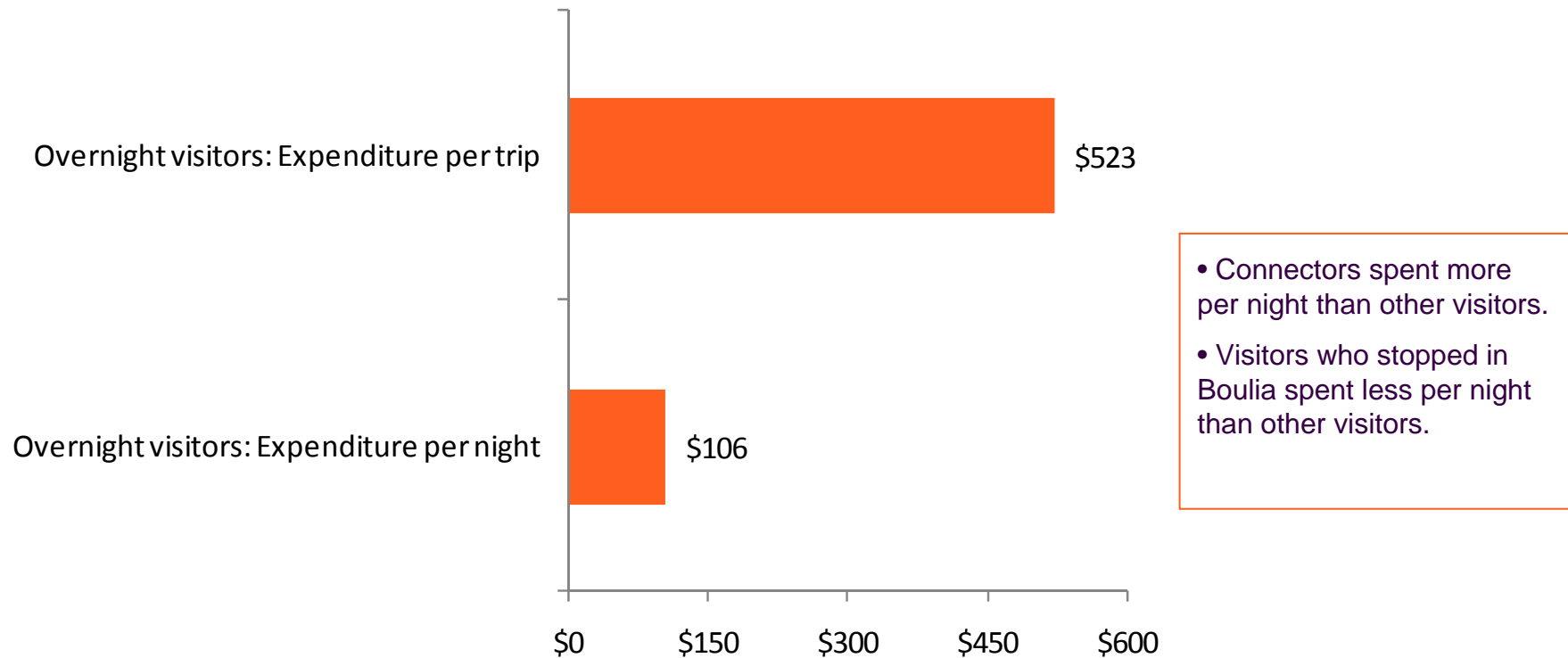
Caravan or camping visitors had a range of facilities with them



Base = 337

"Which of the following facilities did your motorhome, campervan, caravan, camper trailer or camping gear include?"

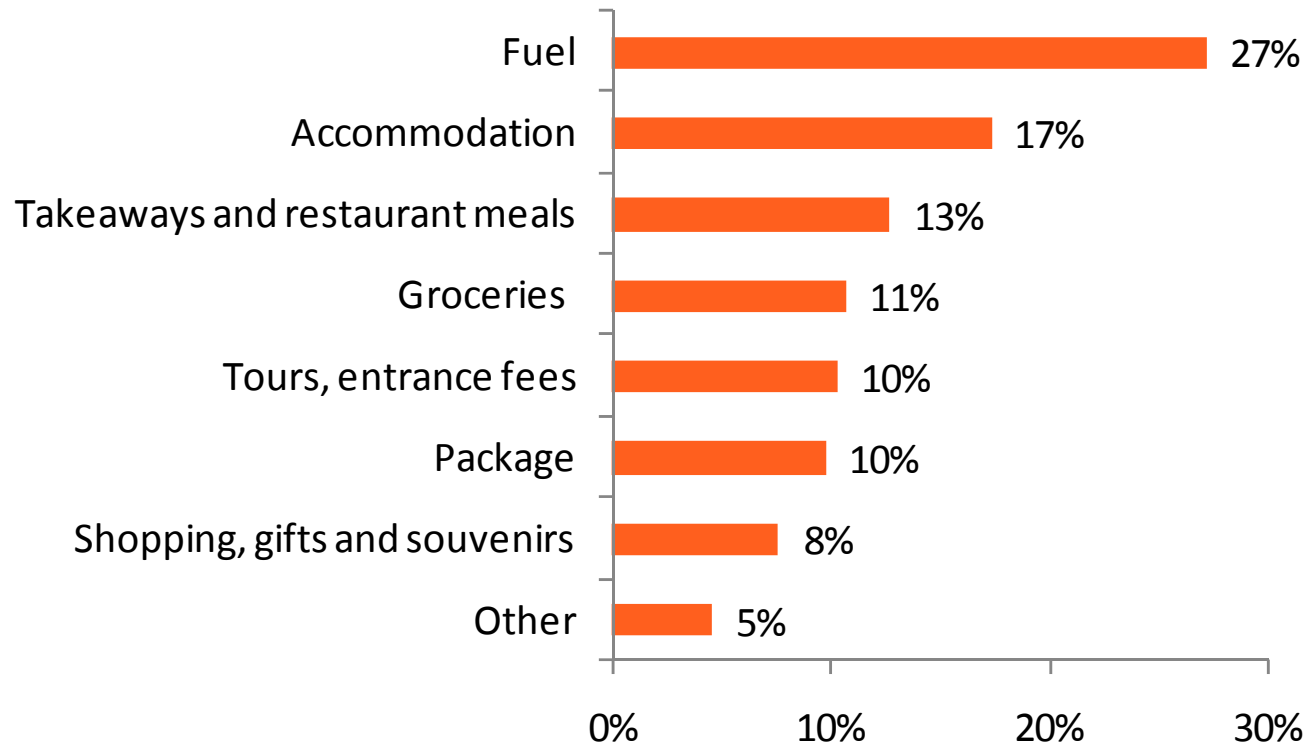
Visitors spent over \$500 per trip in the region



Base = 415
Note: From recruitment data file

“How much have you spent so far in the Central West region, including any money paid before the trip, and excluding any package expenditure?”
“How much do you think you will spend in the Central West region for the remainder of your stay excluding any package expenditure?”

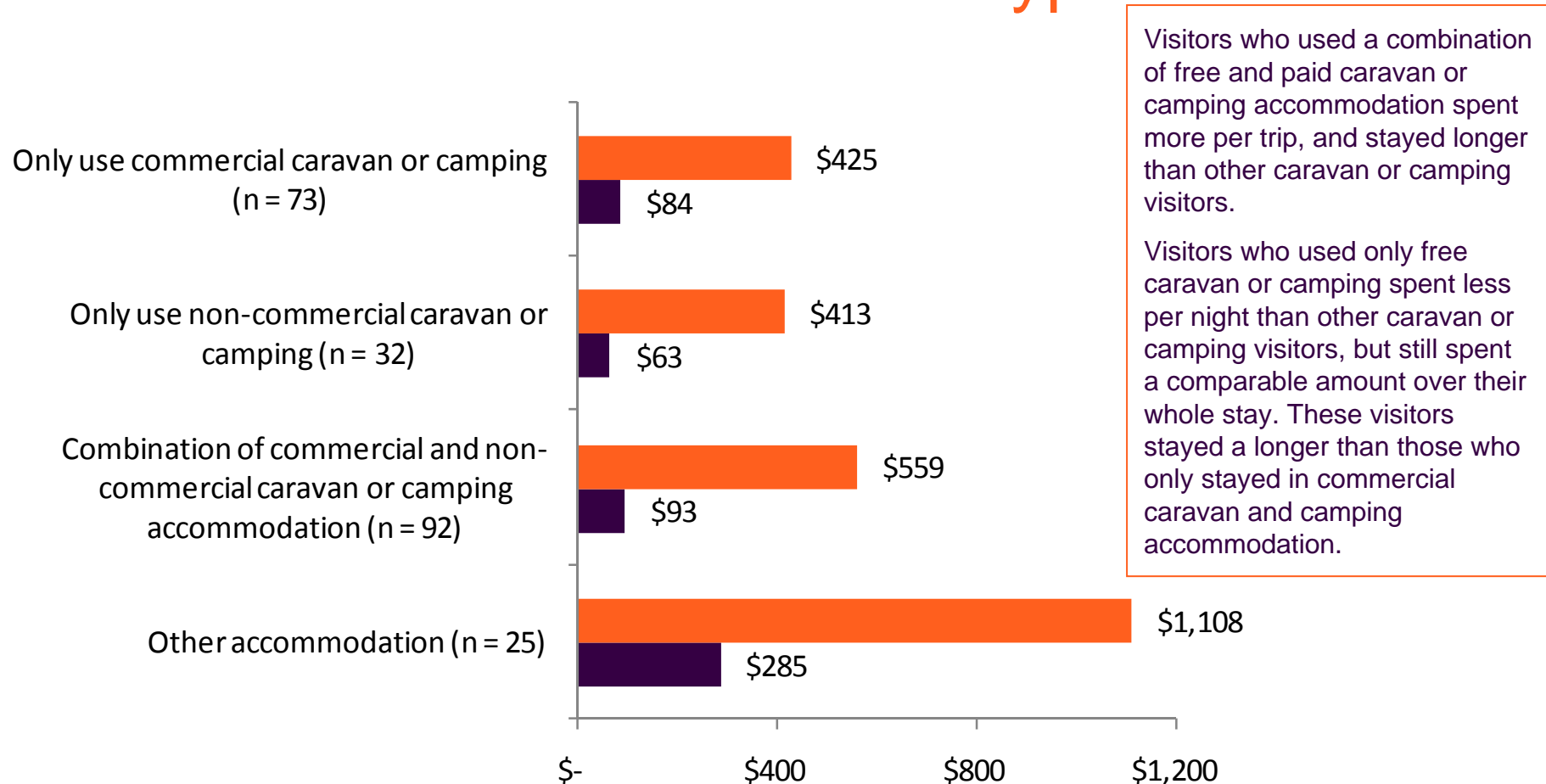
Visitors spent most on fuel in the region



Base = 415
Note: From recruitment data file

“How much have you spent so far in the Central West region, including any money paid before the trip, and excluding any package expenditure?”
“How much do you think you will spend in the Central West region for the remainder of your stay excluding any package expenditure?”

Expenditure differences existed between accommodation type

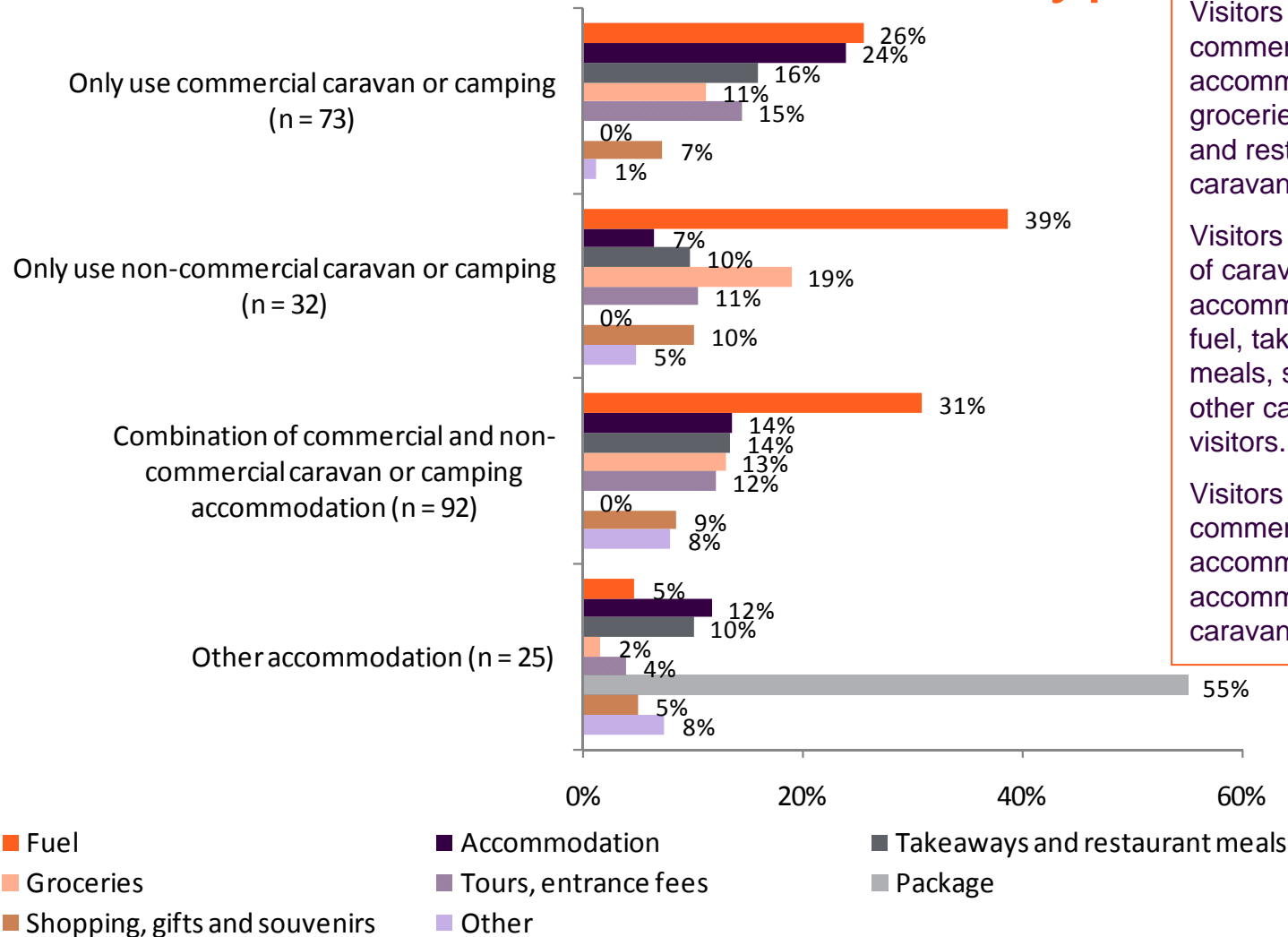


Base = 222

Note: From recruitment data where the main questionnaire was also answered

“How much have you spent so far in the Central West region, including any money paid before the trip, and excluding any package expenditure?”
“How much do you think you will spend in the Central West region for the remainder of your stay excluding any package expenditure?”

Expenditure on different items by accommodation type



Visitors who only used non-commercial caravan or camping accommodation spent more on groceries but less on takeaways and restaurant meals than other caravan or camping visitors.

Visitors who used a combination of caravan or camping accommodation spent more on fuel, takeaways and restaurant meals, shopping and tours than other caravan or camping visitors.

Visitors who only used commercial caravan or camping accommodation spent more on accommodation than other caravan or camping visitors.

Base = 222 - From recruitment data where the main questionnaire was also answered

Note: Visitors who only used non-commercial caravan or camping includes visitors who paid for caravan or camping on crown land or in a national park.

"How much have you spent so far in the Central West region, including any money paid before the trip, and excluding any package expenditure?"
"How much do you think you will spend in the Central West region for the remainder of your stay excluding any package expenditure?"

Summary

- Over three quarters of visitors spent 4 or more nights in the region – 41 percentage points above the VPS benchmark.
- Caravan parks or commercial camping grounds was the main accommodation used with nearly half (48%) of visitors using it as their main accommodation. This was a higher proportion than the VPS benchmark (23%).
- The majority of visitors (64%) stayed in a Caravan park or commercial camping ground for part of their trip to the QOCW region, with 29% only using this type of accommodation.
- A further 37% used commercial caravan or camping accommodation in combination for non-commercial caravan or camping options.
- Only 12% just used non-commercial caravan or camping options, while 22% didn't stay in any caravan or camping accommodation.
- Visitors who used a combination of commercial and non-commercial caravan or camping accommodation options stayed longer in the region than those who just used one or the other (Median 8 nights compared with 6 nights). Consequently they spent more on their trip.

Summary

- Visitors who stayed in non caravan or camping accommodation only spent 4 nights in the regions. They were also more likely to be from within Queensland (57%) than other visitors.
- Visitors who only stayed in non-commercial caravan or camping options were more likely to be repeat visitors (65%) and less likely to use the internet for information or to make bookings than other visitors.
- There was a higher proportion of visitors less than 45 years staying in non-commercial caravan or camping accommodation only and a higher proportion of visitors 65 years and over staying in non caravan or camping accommodation compared with other accommodation options.
- Nearly all caravan or camping visitors had cooking facilities (97%) and a refrigerator (94%) with them.
- Visitors who stayed at non-commercial caravan or camping options during their trip were more likely to have a toilet, shower, hot water system and generator with them compared with those who only stayed in commercial caravan or camping grounds.
- A quarter of visitor expenditure was on fuel, followed by 17% on accommodation.
- Visitors who only stayed in non-commercial caravan or camping accommodation spent less per night than other visitors, but as they stayed longer on average they spent a similar amount on their entire visit.

Why they visited the QOCW region and were they happy



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia

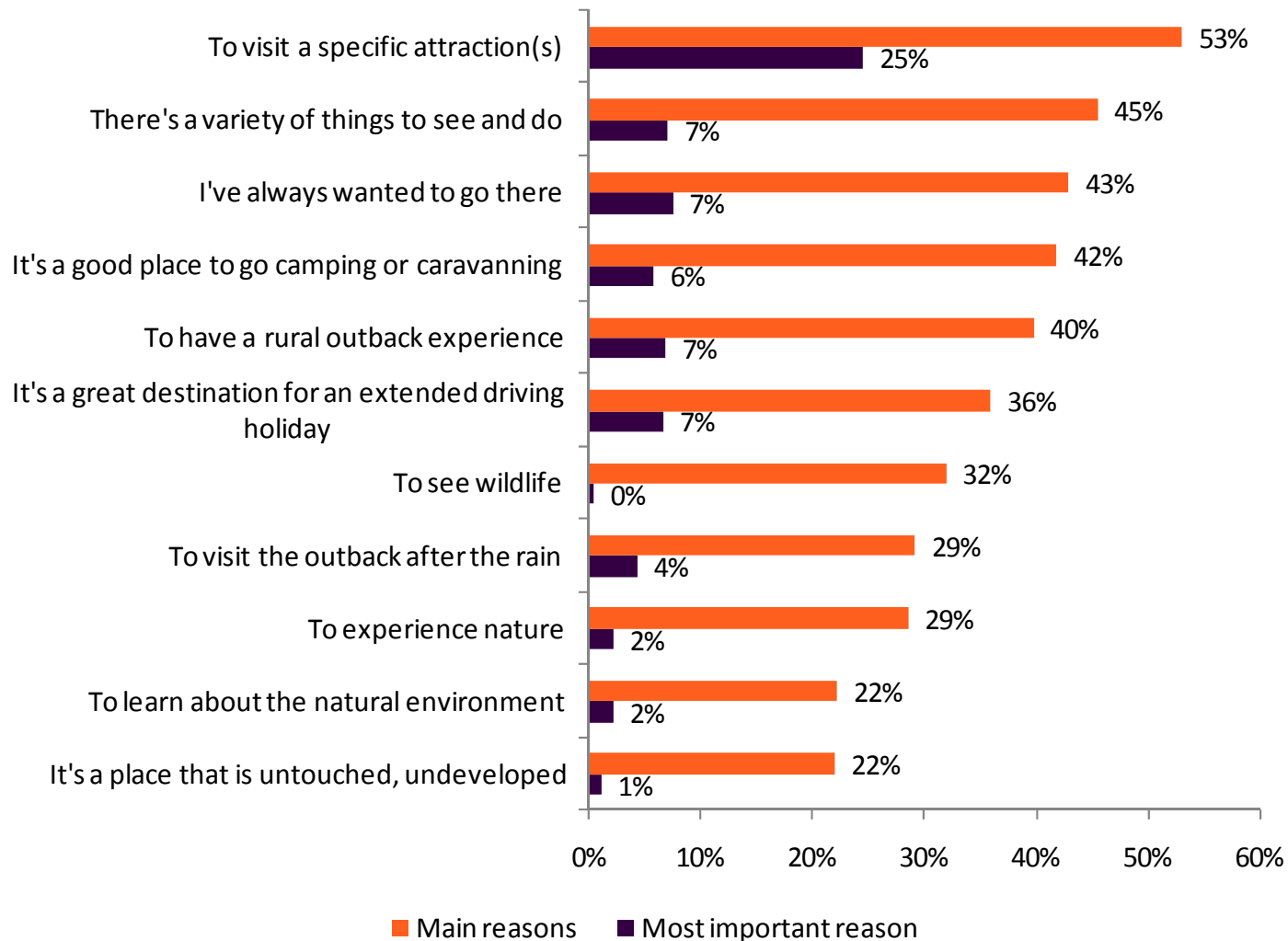


TRA TOURISM
RESEARCH
AUSTRALIA

Reasons for visiting the QOCW region

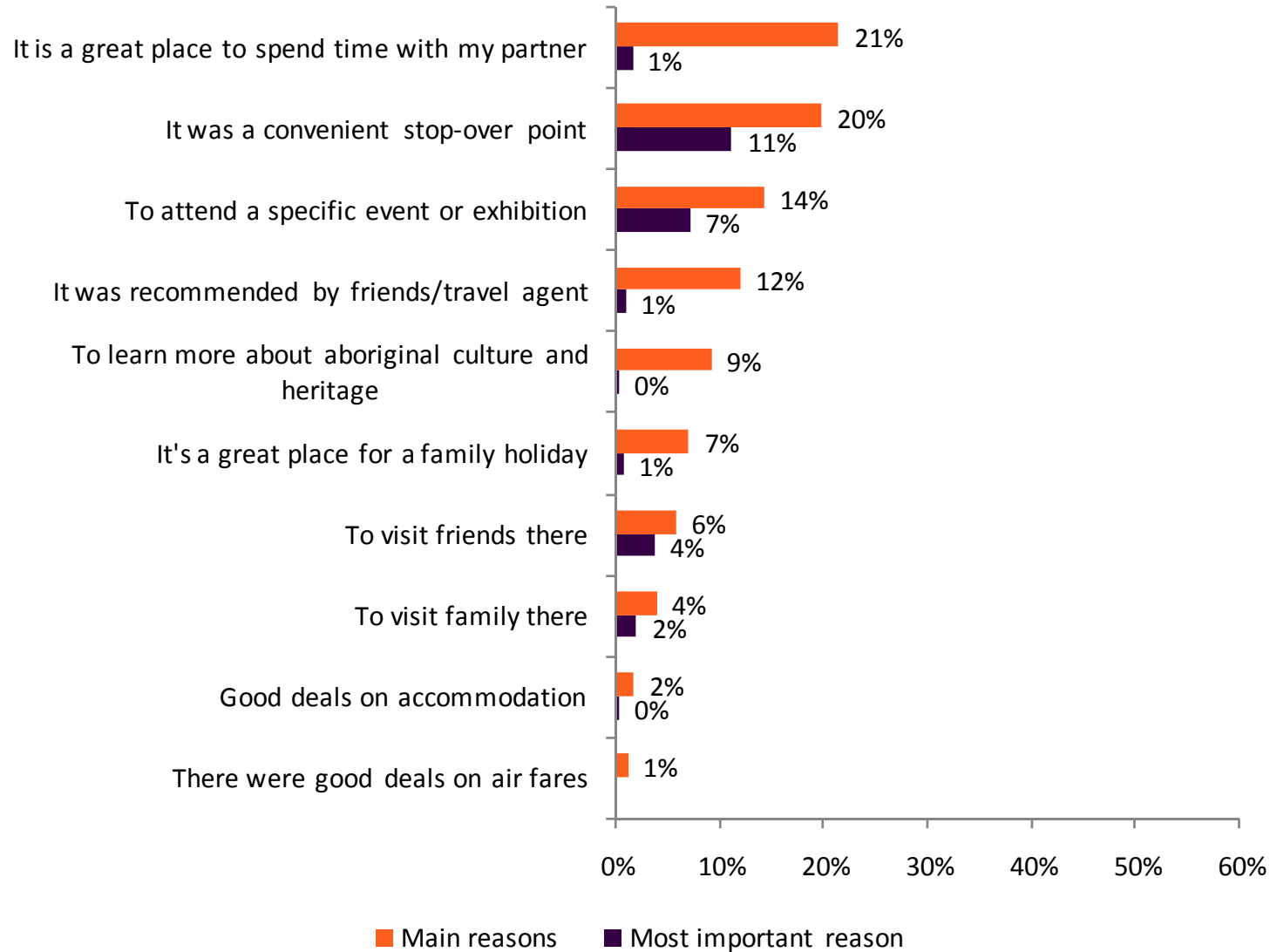
- Reasons for choosing destination
- Expectations of experiences
- Importance of destination attributes

To visit specific attractions was the main reason why QOCW was chosen



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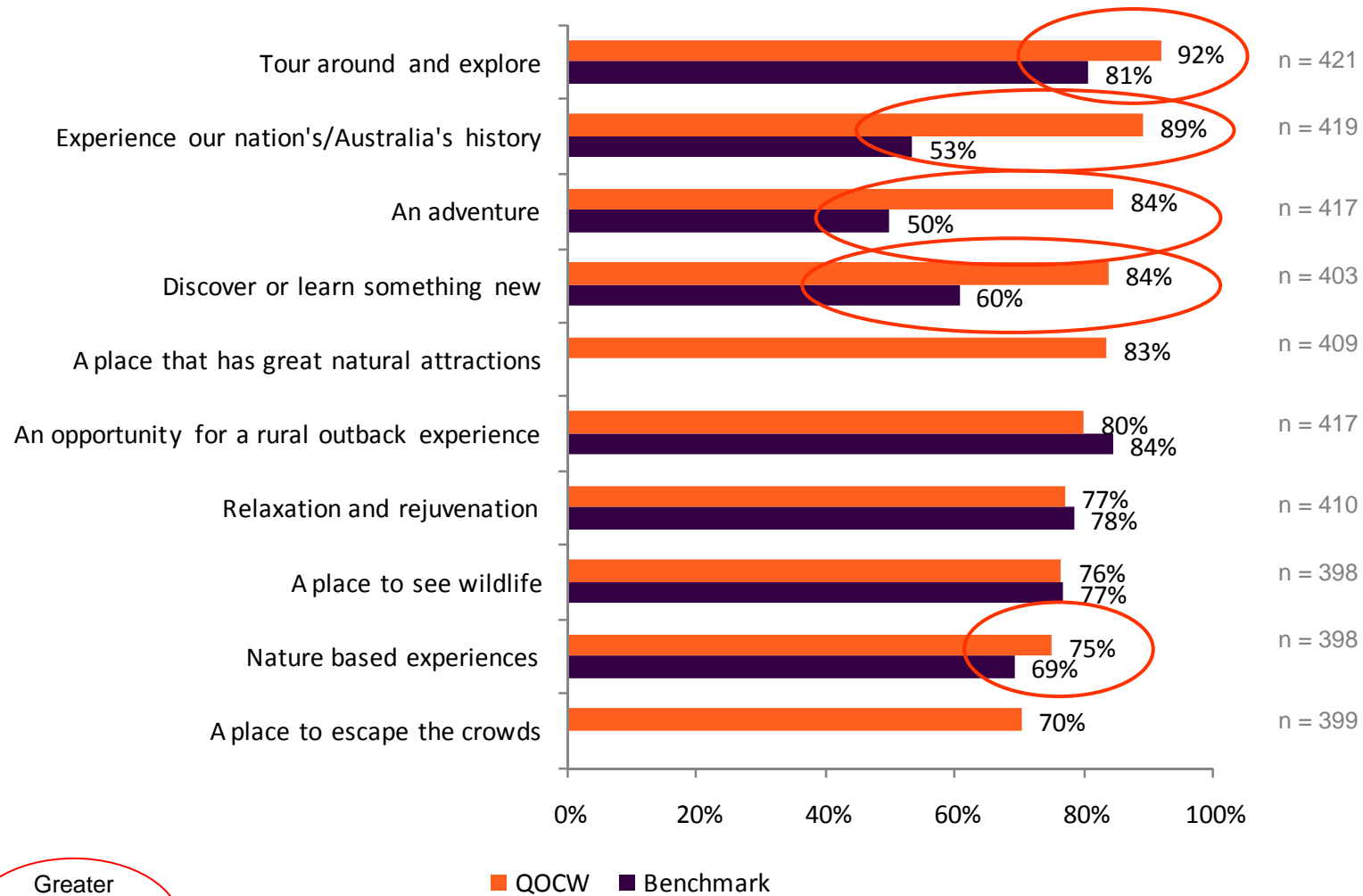
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Bases: All respondents Main Reason = 473
All respondents Most important = 469

"Why did you chose the Central West region?"
'Which of the following was most important in choosing the Central West region?'

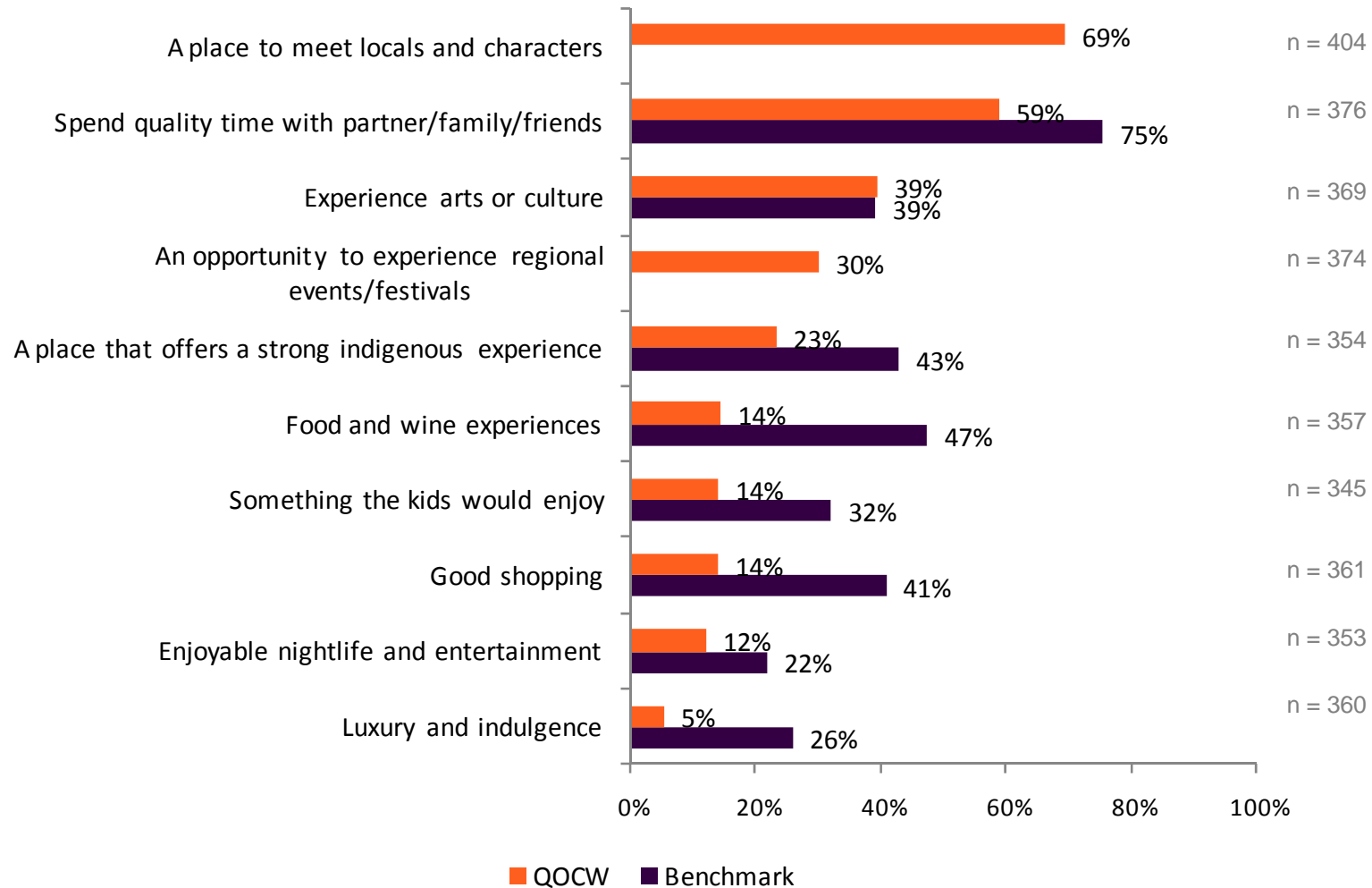
Expectations for a number of experiences were well above VPS benchmarks



Greater than the VPS benchmark

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Repeat visitors were more likely to expect the region to offer a strong indigenous experience than first time visitors (29% cf 18%)

"Which, if any, of the experiences listed below did you expect the Central West region to offer?"

Expectations for different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Expectations above expectations of all visitors to QOCW (More than 3 points above)	None	<ul style="list-style-type: none"> • An opportunity to experience regional events/festivals • Something the kids would enjoy • A place to meet local characters • A place to escape the crowds • Good shopping • A place that offers a strong indigenous experience • Discover or learn something new • Nature based experiences • Relaxation and rejuvenation • Luxury and indulgence • A place to see wildlife • Experience our nation's/Australia's history • A place that has great natural attractions 	<ul style="list-style-type: none"> • A place to escape the crowds • An adventure • Spend quality time with partner/family/friends • A place to see wildlife • Nature based experiences • Relaxation and rejuvenation • An opportunity to experience regional events/festivals 	<ul style="list-style-type: none"> • Food and wine experiences • Experience arts or culture • Luxury and indulgence

“Which, if any, of the experiences listed below did you expect the Central West region to offer?”

“What types of accommodation did you use in the Central West region during your trip? ”

Expectations for different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Expectations below expectations of all visitors to QOCW (More than 3 points below)	<ul style="list-style-type: none"> • An opportunity to experience regional events/festivals • Spend quality time with partner/family/friends • Luxury and indulgence • Nature based experiences • A place to meet local characters 	None	<ul style="list-style-type: none"> • Food and wine experiences 	<ul style="list-style-type: none"> • A place to escape the crowds • A place to see wildlife • An adventure • Relaxation and rejuvenation • Nature based experiences • Tour around and explore • An opportunity to experience regional events/festivals • A place that has great natural attractions

“Which, if any, of the experiences listed below did you expect the Central West region to offer?”

“What types of accommodation did you use in the Central West region during your trip? ”

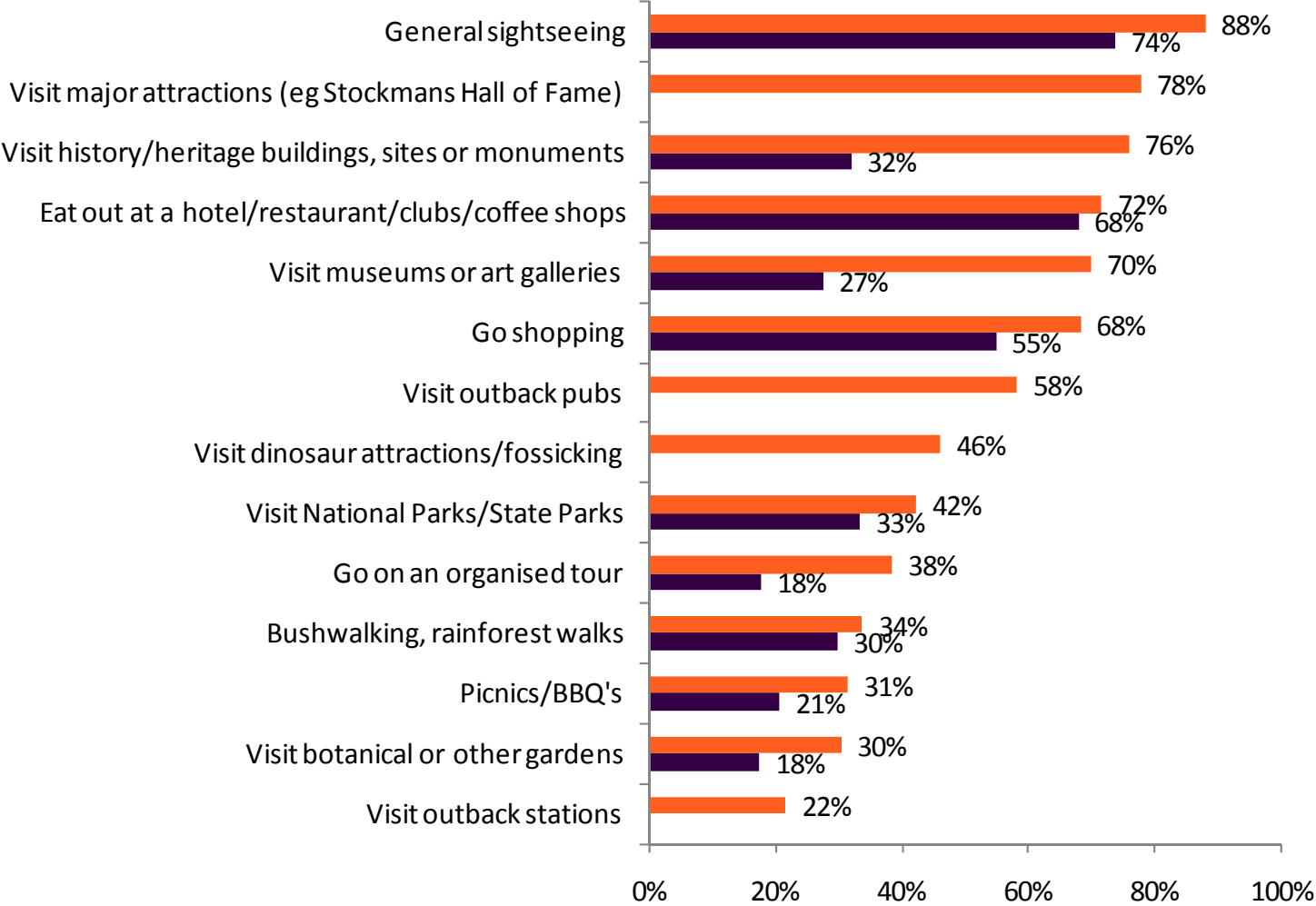
Summary

- The most important reason for visiting the QOCW region was *to visit a specific attraction(s)* – 25% of visitors.
- Other reasons given included *variety of things to see and do, always wanted to visit there, a good place to go camping or caravanning, to have a rural outback experience and it is a great destination for an extended driving holiday.*
- The top 5 experiences visitors expected the region to offer included *touring around and exploring* (92% of visitors expected this experience), *to experience our nation's/Australia's history* (89%), *an adventure* (84%), *to discover and learn something new* (84%) and *a place that has great natural attractions* (83%).
- The expectations for these experiences was above the VPS benchmarks.
- The expectation that the region would *offer a strong indigenous experience* was 20 percentage points below the VPS benchmark and 5 points below the benchmark for the subgroup (includes NT destinations). About 23% of visitors expected the region to offer this experience.
- Repeat visitors were more likely to expect this experience than first time visitors (29% compared with 18%).
- Visitors who only used non-commercial caravan or camping accommodation had higher expectations across a range of experiences compared with visitors who only used commercial caravan or camping accommodation.

What did they do in the QOCW region?

➤ Activities

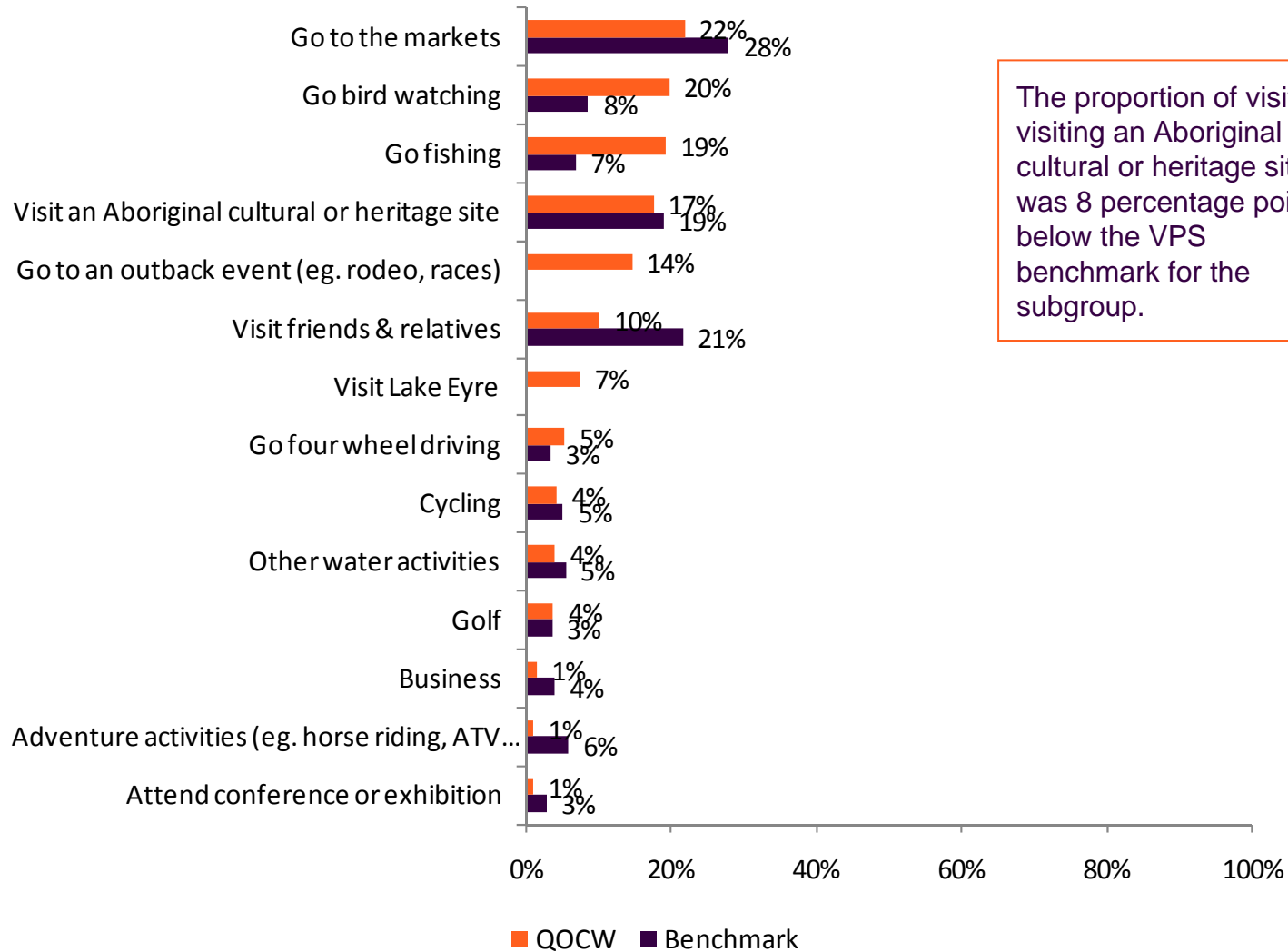
There were a range of activities above the VPS benchmarks



QOCW Benchmark

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The proportion of visitors visiting an Aboriginal cultural or heritage site was 8 percentage points below the VPS benchmark for the subgroup.

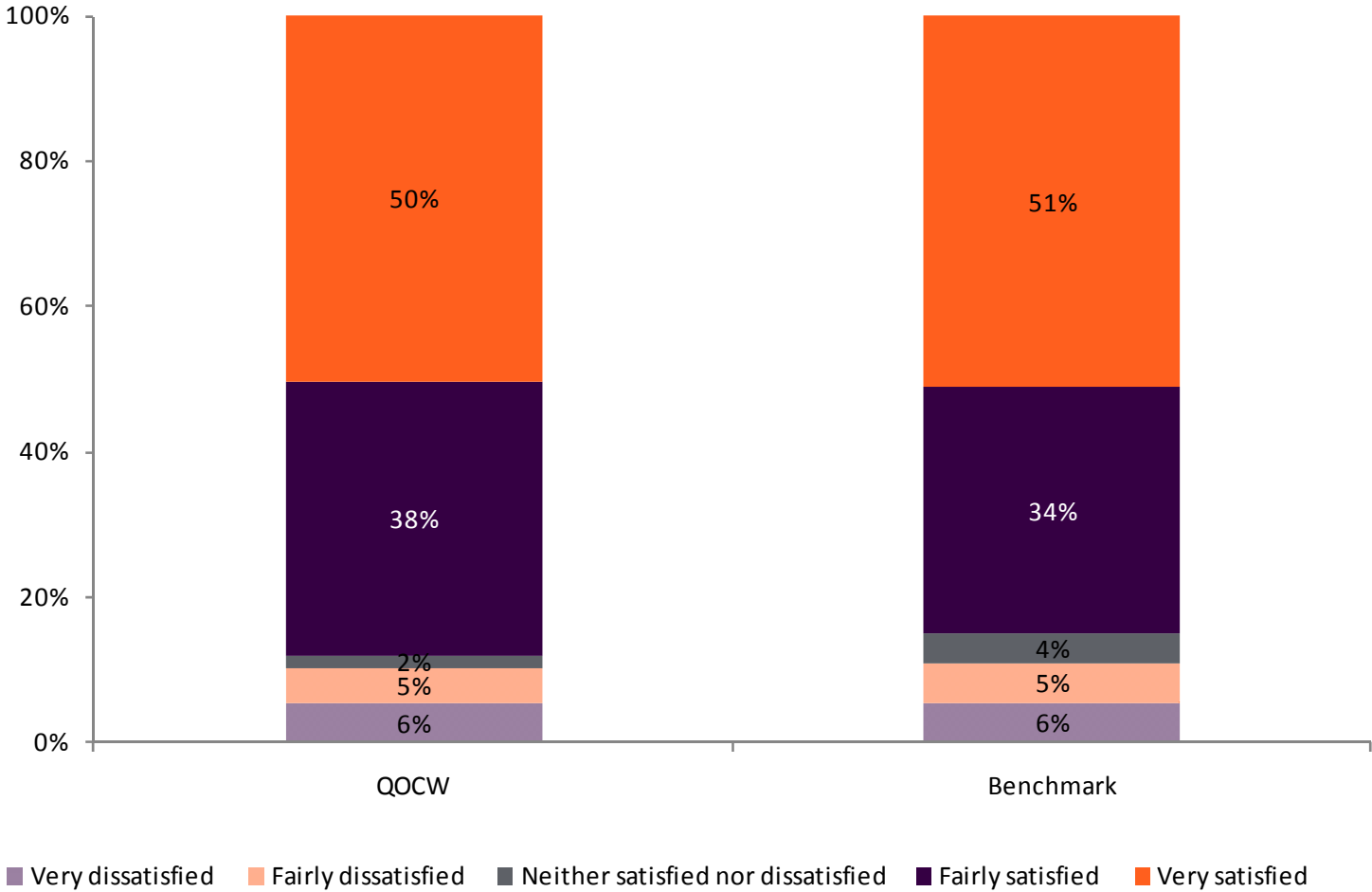
Summary

- The top 5 activities visitors to the region participated in were *general sightseeing* (88%); *visiting major attractions* (78%); *visiting history/heritage buildings, sites and monuments* (76%); *eating out* (72%); and *visiting museums and galleries* (70%).
- Participation in these activities was above the VPS benchmarks.
- About 17% of visitors visited *an Aboriginal cultural or heritage site*. This was a similar proportion to the VPS benchmark, but was 8 points below the VPS benchmark for the subgroup destinations.

Visitor satisfaction in the QOCW region

- Overall satisfaction
- Were expectations met
- Satisfaction with destination attributes
- Recommendation
- Revisitation

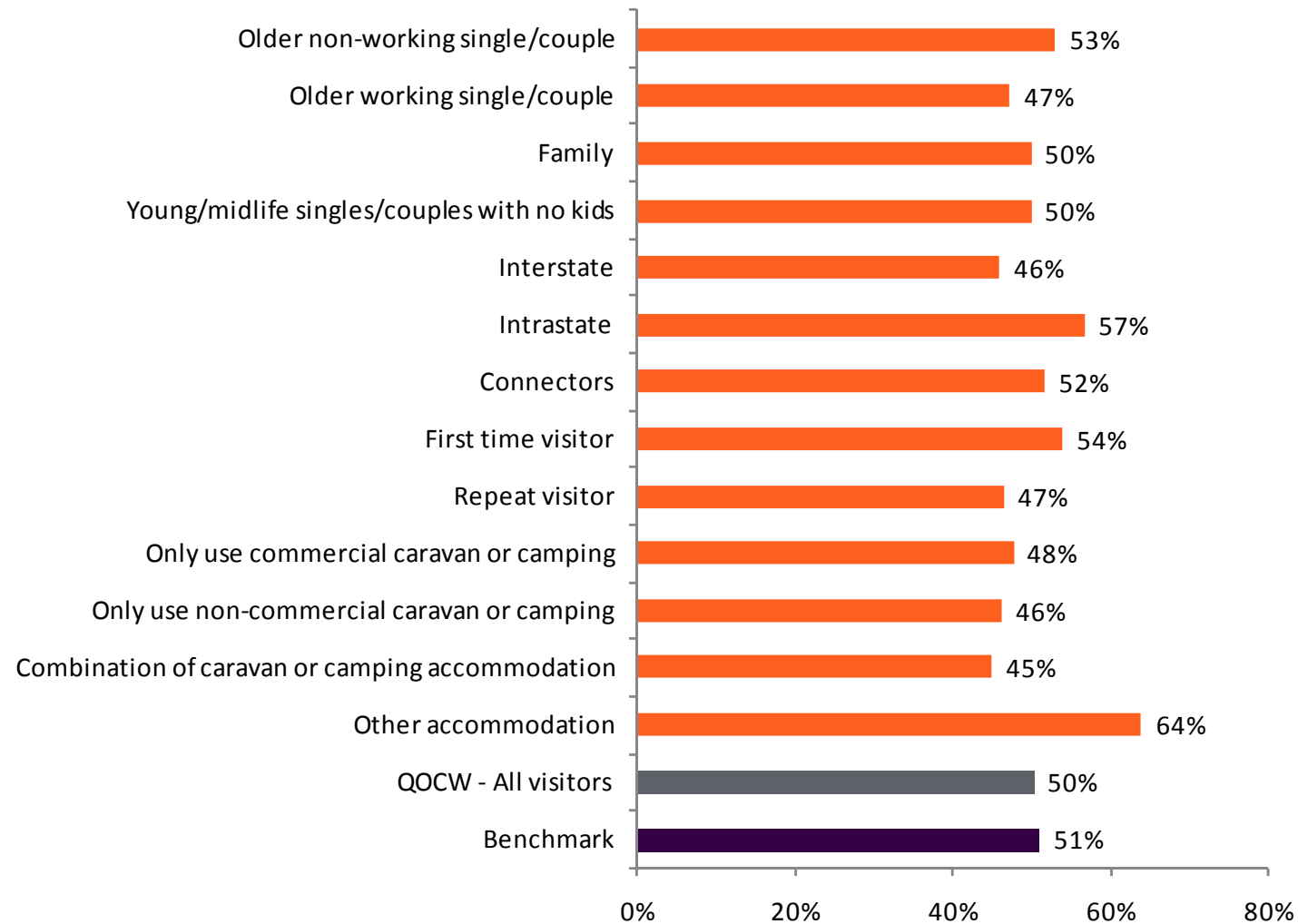
Overall satisfaction was similar to the VPS benchmark



Base = 471

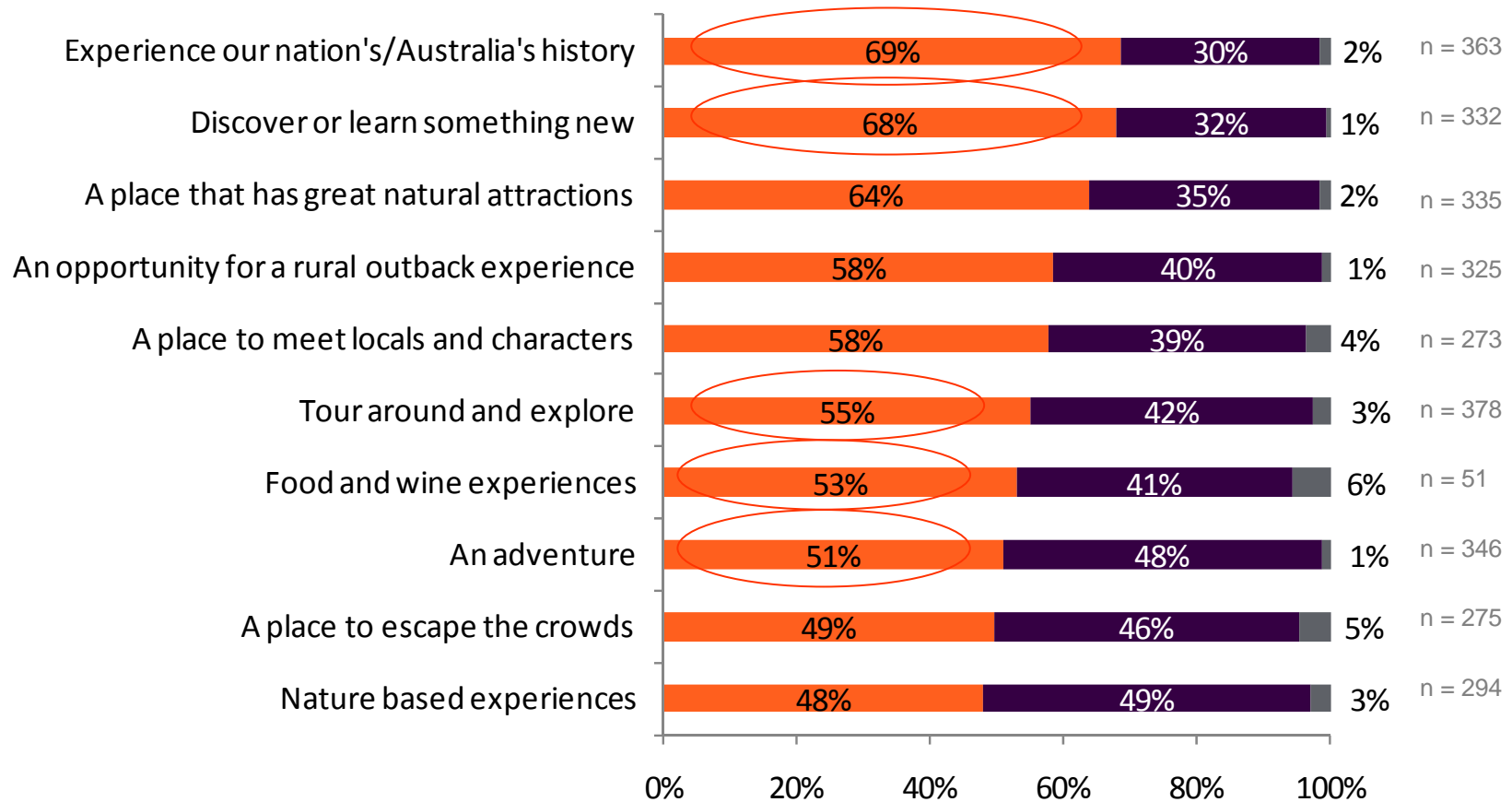
“Overall, how satisfied or dissatisfied were you with your experience at the Central West region?”

Visitors who stayed in caravan or camping accommodation were less satisfied overall



"Overall, how satisfied or dissatisfied were you with your experience at the Central West region?"

Experiencing history and learning something new were experiences the region is delivering

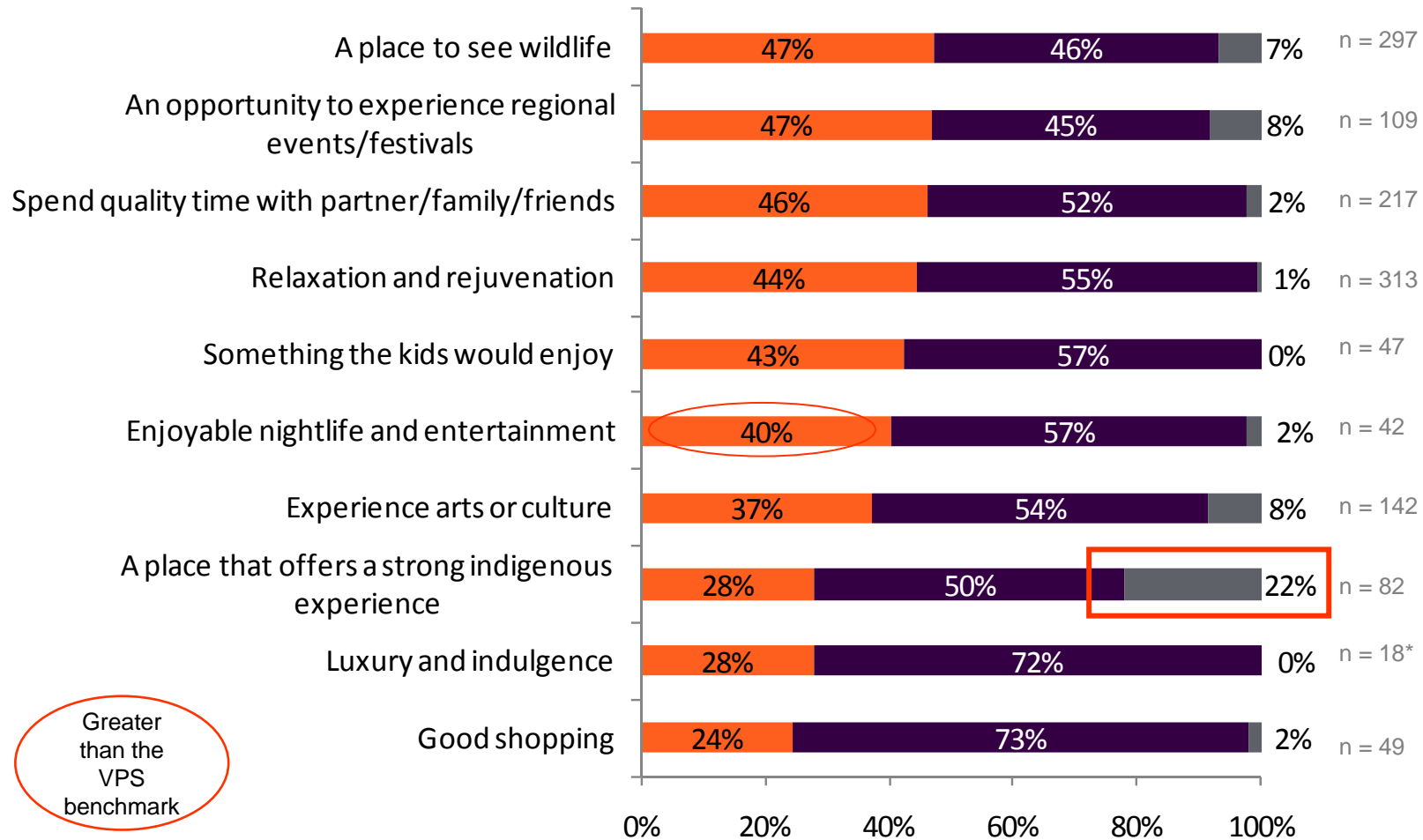


Greater than the VPS benchmark

■ Better than expected
 ■ As expected
 ■ Worse than expected

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No difference between first time or repeat visitors

Greater than the VPS benchmark

■ Better than expected ■ As expected ■ Worse than expected

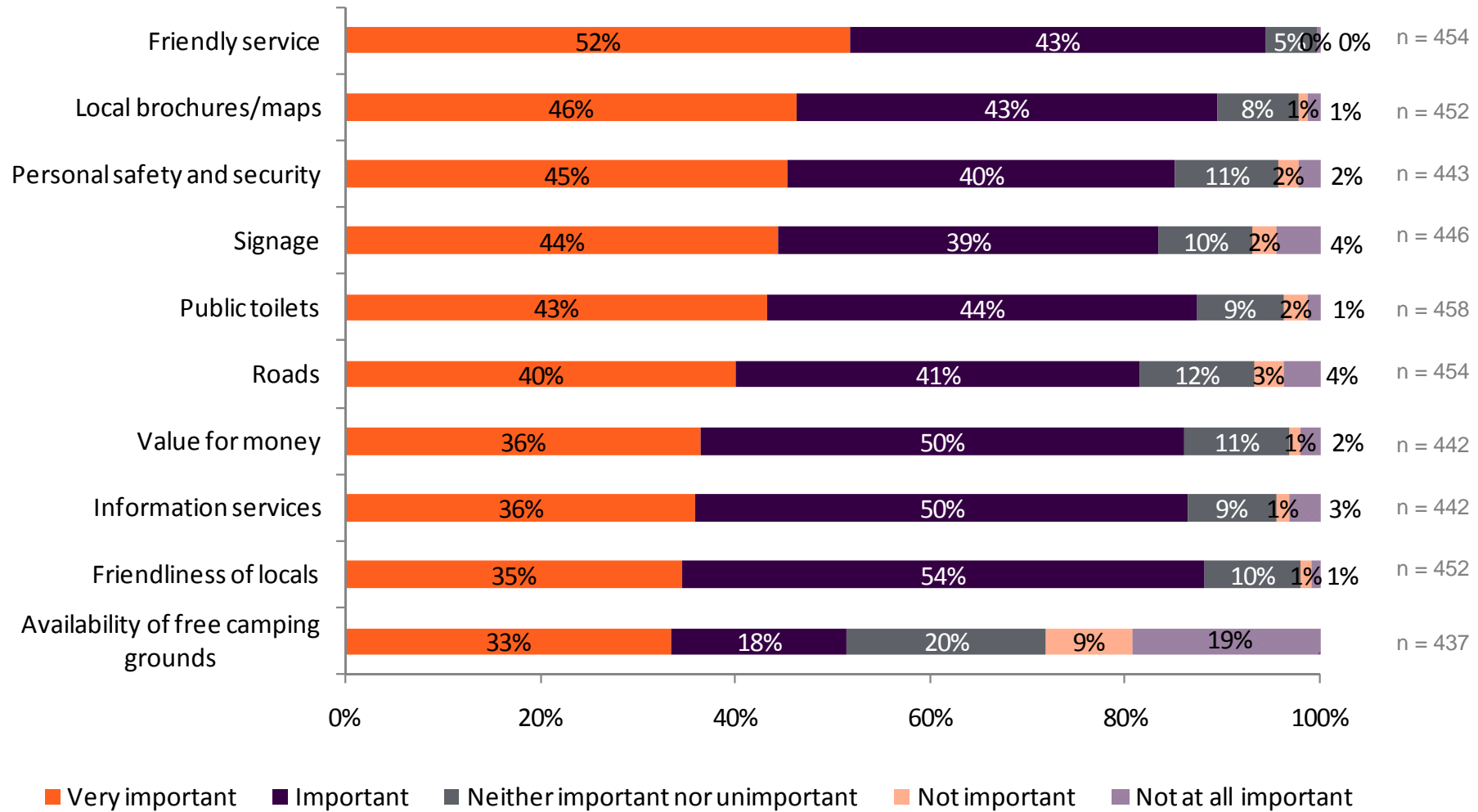
* Small Base

The proportion who rated the region as a place to offer a strong indigenous experience as worse than expected was below both the VPS benchmark and the benchmark for the subgroup.

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

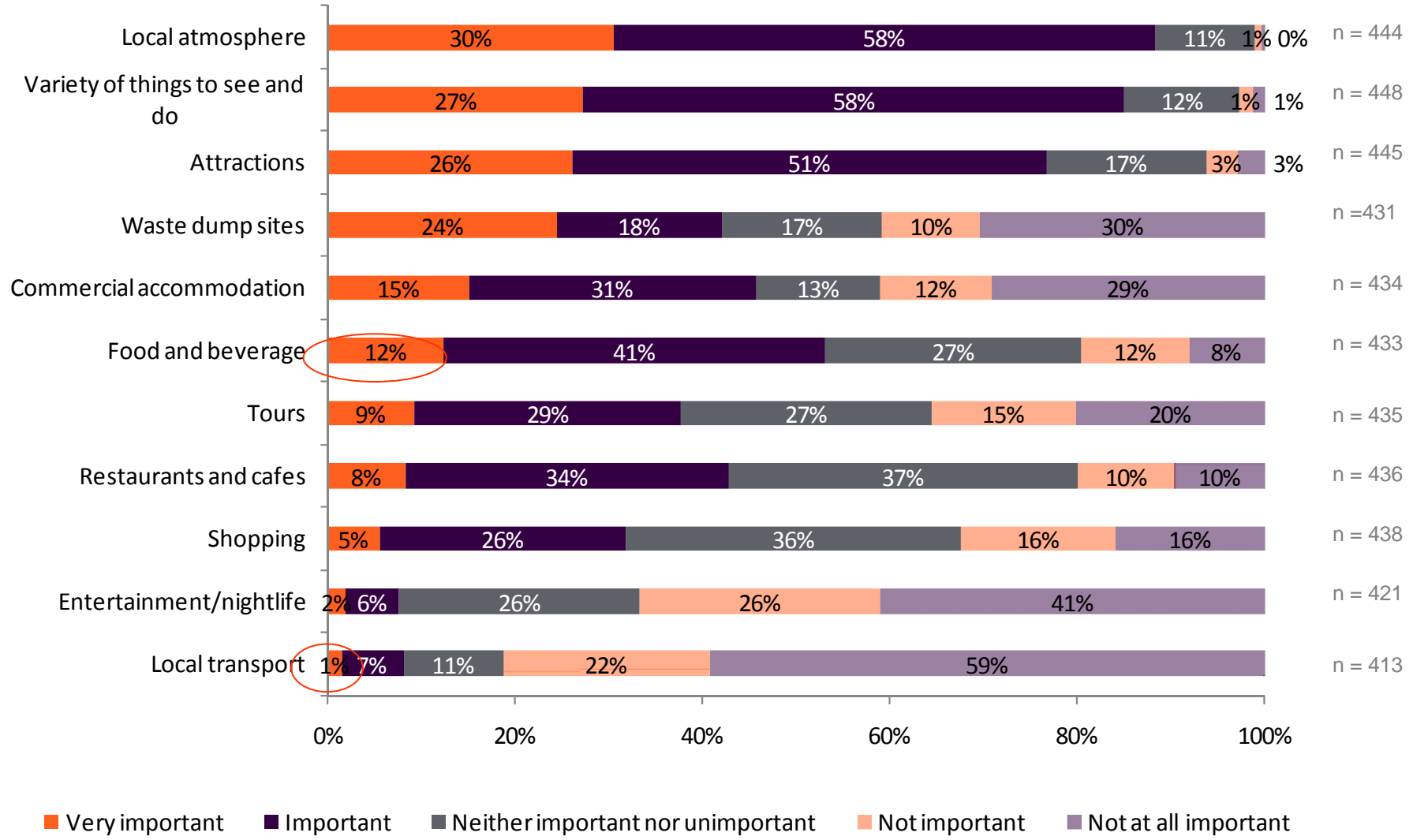


Importance of local transport and food and beverage were below the VPS benchmark



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Less than the VPS benchmark

“Again, thinking about your most recent trip to the Central West region, how important or unimportant was ...”

Importance of attributes for different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Proportion of visitors rating attributes as very important above the rating for all visitors to QOCW (More than 3 points above)	<ul style="list-style-type: none"> • Commercial accommodation • Roads • Attractions • Variety of things to see and do • Personal safety and security • Local brochures/maps 	<ul style="list-style-type: none"> • Availability of free camping grounds • Waste dump sites • Roads • Friendly service • Signage • Friendliness of locals • Public toilets • Value for money • Variety of things to see and do • Local atmosphere • Information services • Local brochures/maps • Personal safety and security 	<ul style="list-style-type: none"> • Availability of free camping grounds • Friendly service • Information services • Signage • Waste dump sites • Friendliness of locals • Local atmosphere 	<ul style="list-style-type: none"> • Tours • Food and beverage • Attractions • Commercial accommodation

“What types of accommodation did you use in the Central West region during your trip? ”

“Again, thinking about your most recent trip to the Central West region, how important or unimportant was ...”

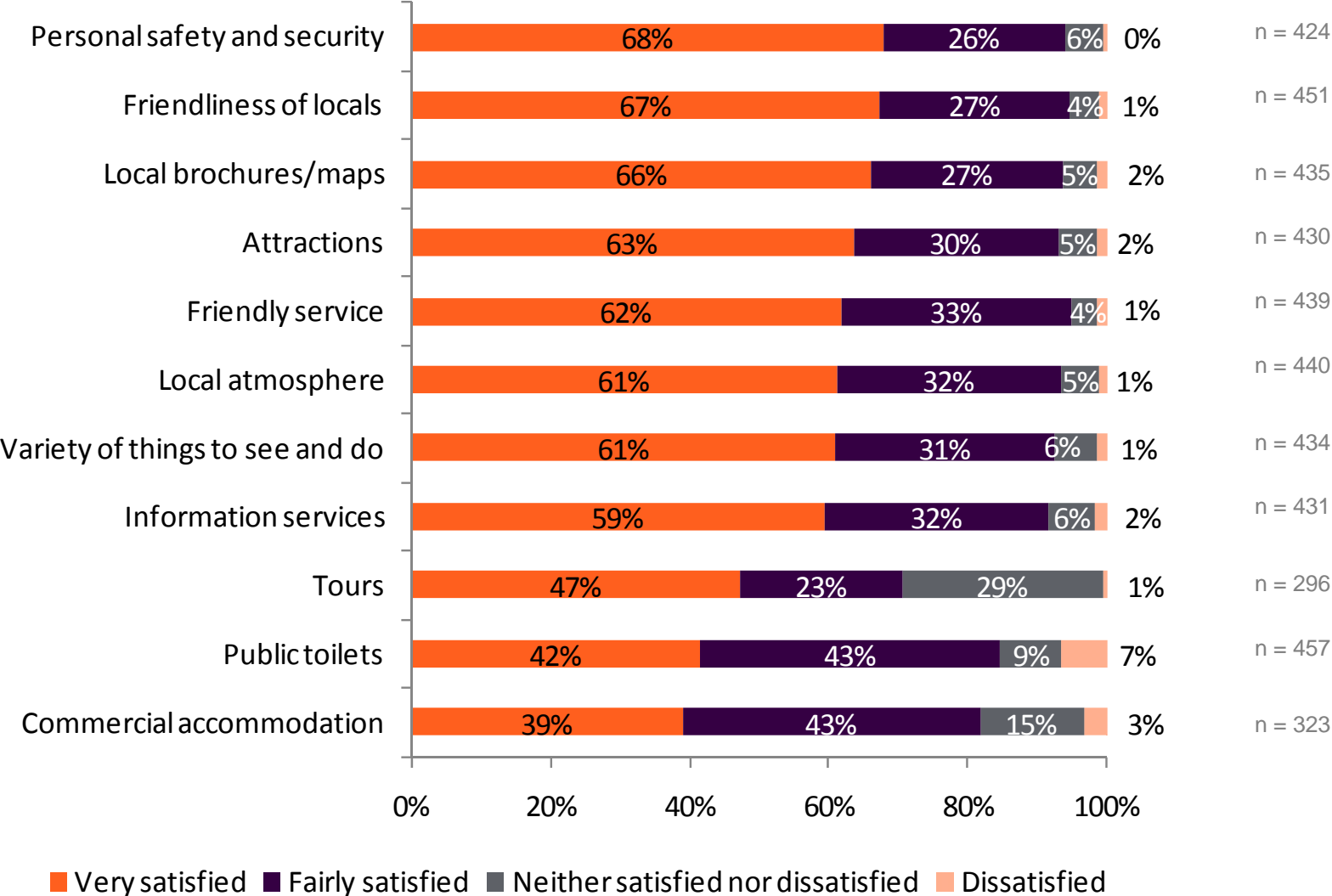
Importance of attributes for different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Proportion of visitors rating attributes as very important below the rating for all visitors to QOCW (More than 3 points below)	<ul style="list-style-type: none"> • Availability of free camping grounds • Friendly service • Signage 	<ul style="list-style-type: none"> • Commercial accommodation • Attractions 	<ul style="list-style-type: none"> • Attractions • Variety of things to see and do • Food and beverage • Tours • Commercial accommodation 	<ul style="list-style-type: none"> • Availability of free camping grounds • Waste dump sites • Roads • Friendly service • Information services • Friendliness of the locals • Local brochures/maps • Signage • Value for money • Local atmosphere • Personal safety and security • Public toilets

“What types of accommodation did you use in the Central West region during your trip?”

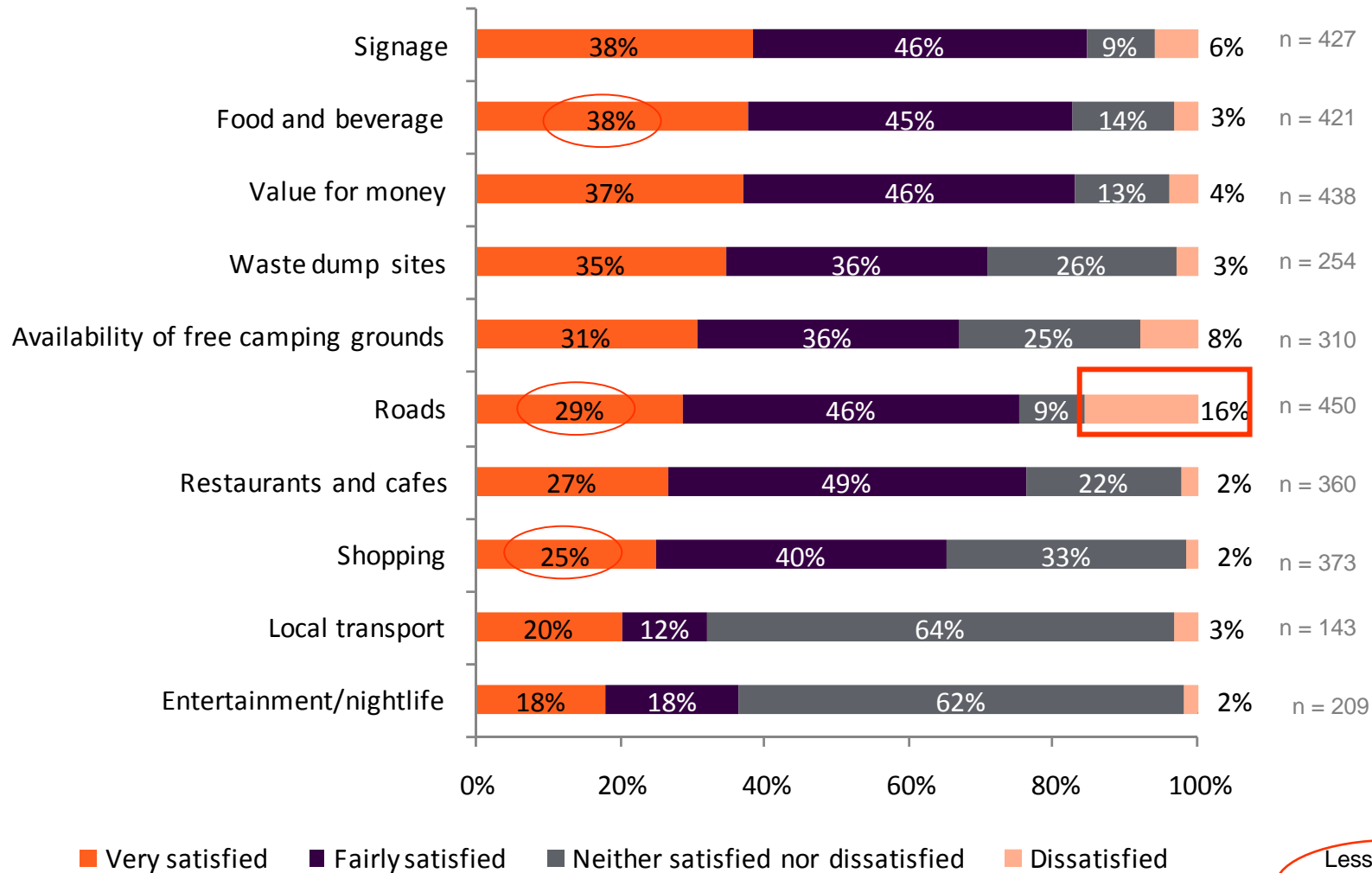
“Again, thinking about your most recent trip to the Central West region, how important or unimportant was ...”

Satisfaction with several attributes was above the VPS benchmarks



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Less than the VPS benchmark

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

Satisfaction with attributes for different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Proportion of visitors very satisfied with attributes above the rating for all visitors to QOCW (More than 3 points above)	<ul style="list-style-type: none"> • Local brochures/maps • Waste dump sites • Entertainment and nightlife • Variety of things to see and do 	<ul style="list-style-type: none"> • Availability of free camping grounds • Shopping • Personal safety and security • Public toilets • Friendly service • Value for money • Waste dump sites 	None	<ul style="list-style-type: none"> • Local transport • Food and beverage • Commercial accommodation • Restaurants and cafes • Value for money • Tours • Attractions • Variety of things to see and do • Roads • Friendly service • Public toilets

Visitors also rated the attribute as 'very important'.

"What types of accommodation did you use in the Central West region during your trip?"

"And how satisfied or dissatisfied were you with..."

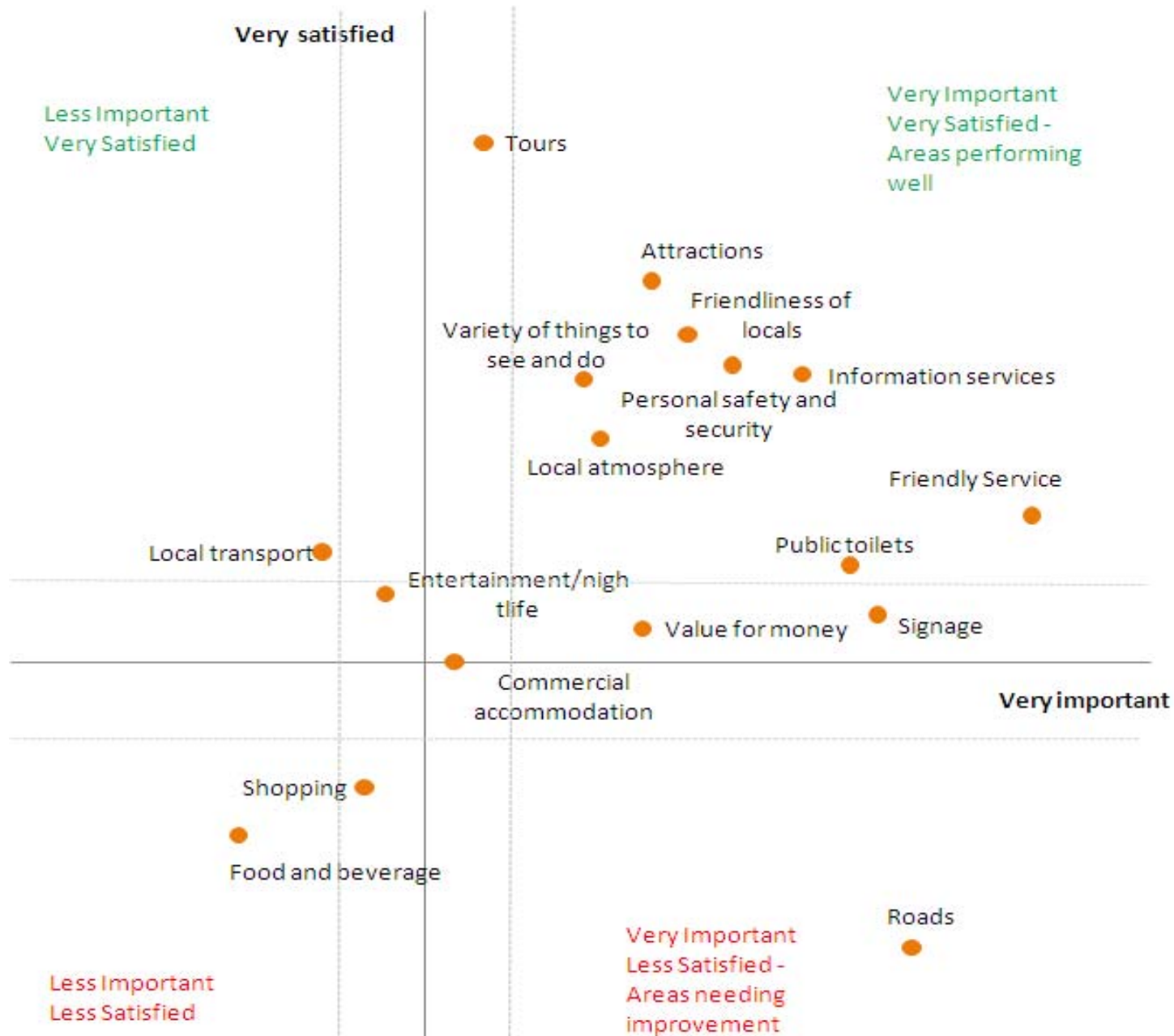
Satisfaction with attributes for different accommodation users

	Commercial caravan or camping ONLY	Non-commercial caravan or camping ONLY	Combination of caravan or camping options	Other accommodation
Proportion of visitors very satisfied with attributes below the rating for all visitors to QOCW (More than 3 points below)	<ul style="list-style-type: none"> • Local transport • Availability of free camping grounds • Commercial accommodation 	<ul style="list-style-type: none"> • Local transport • Commercial accommodation • Variety of things to see and do • Entertainment and nightlife • Food and beverage • Tours 	<ul style="list-style-type: none"> • Local transport • Food and beverage • Attractions • Tours • Commercial accommodation • Restaurants and cafes • Value for money • Variety of things to see and do • Entertainment and nightlife • Friendly service 	<ul style="list-style-type: none"> • Availability of free camping grounds • Waste dump sites • Information services

Visitors also rated the attribute as 'very important'.

"What types of accommodation did you use in the Central West region during your trip?"

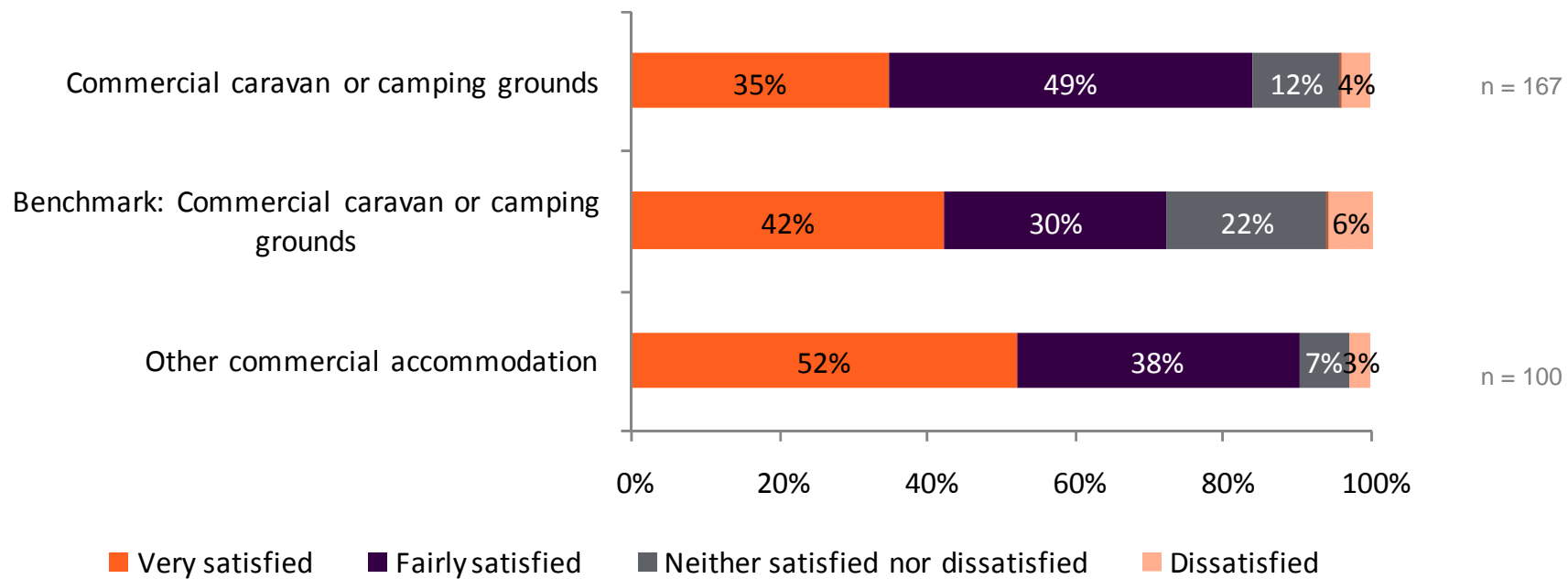
"And how satisfied or dissatisfied were you with..."



“Again, thinking about your most recent trip to the Central West region, how important or unimportant was ...”

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

Visitors were more satisfied overall with commercial caravan or camping grounds than the VPS benchmark



“What type of accommodation did you mainly use in the Central West region?”
“And how satisfied or dissatisfied were you with....”

Visitors were happy with many experiences in the region

- *I liked camping along the Barcoo River at Isisford. (55 to 64 years, Repeat visitor)*
- *Wonderful camping area at Isisford Wier. (55 to 64 years, First time visitor)*
- *People (caravan parks) are trying to offer more to get the tourist \$ which is good as you don't have to go outside van park for entertainment. (55 to 64 years, First time visitor)*
- *Entertainment offered in van parks e.g. Longreach Discovery Park had an educational talk on snakes after being entertained by performing cockatoos. (Repeat visitor)*
- *Bush poets and story tellers in van parks were fantastic. Friendliness of the locals – no one seems in a rush. (55 to 64 years, First time visitor)*
- *All excellent – Outback Hall of Fame, Qantas Museum, Waltzing Matilda Centre. History of area well documented. Liked it all. (55 to 64 years, First time visitor)*

Visitors were happy with many experiences in the region

- *To see our history and heritage promoted e.g. at the Outback Hall of Fame & the Workers Heritage Centre, Qantas Museum, Waltzing Matilda Centre – a wonderful record of the pioneering spirit that makes our country so great. The roads were good to. (55 to 64 years, Repeat visitor)*
- *Cleanliness of towns like Tambo, Blackall, Lifracombe. Effort of Lifracombe to preserve history. (35 to 44 years, Repeat visitor)*
- *Matilda Centre, Qantas Museum, Hall of Fame, some lovely small towns. (65+ years, First time visitor)*
- *Friendly people. Every time I come out here the landscape is different. It's like visiting a new place each year. (55 to 64 years, First time visitor)*
- *The amount of places of significance that we could visit every day. We still think Lifracombe is the best kept secret around. (45 to 54 years, Repeat visitor)*
- *The whole experience of the visit was great for our children as they have only experienced city living. (35 to 44 years, First time visitor)*

Visitors were happy with many functional aspects of the trip

- *Roads very good. Accommodation was clean & tidy. Beer was cold. Longreach had some very interesting exhibits. Lovely weather and beautiful caravan park at Barcaldine (Family Tourist Park). (45 to 54 years, First time visitor)*
- *Entertainment/meals provided at caravan parks. (First time visitor)*
- *The availability of free/low cost camping. (Extremely important when on extended touring). (55-64 years, Repeat visitor)*
- *The well maintained toilet and shower facilities and available free camp sites. (45 to 54 years, First time visitor)*
- *Excellent tourist information centres, heaps of brochures. Tourist attraction very good. People very friendly & helpful. Public toilets excellent even those in non tourist towns. Toilets on roadside stops. We need more of that. Thank you. (45 to 54 years, First time visitor)*
- *The rest stops with toilets along the way were amazing. (35 to 44 years, First time visitor)*
- *The condition of roads surprised us – very good. Availability of camping sites was good. (65+ years, First time visitor)*
- *Extremely low cost entry to exhibits at some places. (45 to 54 years, First time visitor)*

Visitors were unhappy with some information services

- *Limited enthusiasm from many staff at visitor information centres. (65+ years, First time visitor)*
- *Rudeness gave you the feeling you were not wanted at some information centres. (55 to 64 years, First time visitor)*
- *The Age of Dinosaurs Museum at Winton was outstanding – not marketed enough for visitors e.g. in the Caravan park in Winton (stayed 3 nights) other tourists did not know of this tour. (55 to 64 years, First time visitor)*
- *....Longreach (big town with large tourist attractions) had their information centre closed from midday Saturday till Monday morning. (55 to 64 years, First time visitor)*
- *Information and tourist booking facilities closing on Saturday afternoon and Sunday in Longreach. If you need to book phone numbers were given on brochures but other towns have people available to answer questions. (55 to 64 years, First time visitor)*
- *Poor service and facilities open for travellers in Longreach...we were struck by the contrast between Longreach and Barcaldine. Longreach treated us with DISDAIN so we left! (65+ years, First time visitor)*
- *Very dissatisfied with Longreach visitor information centre staff. (55 to 64 years, First time visitor)*

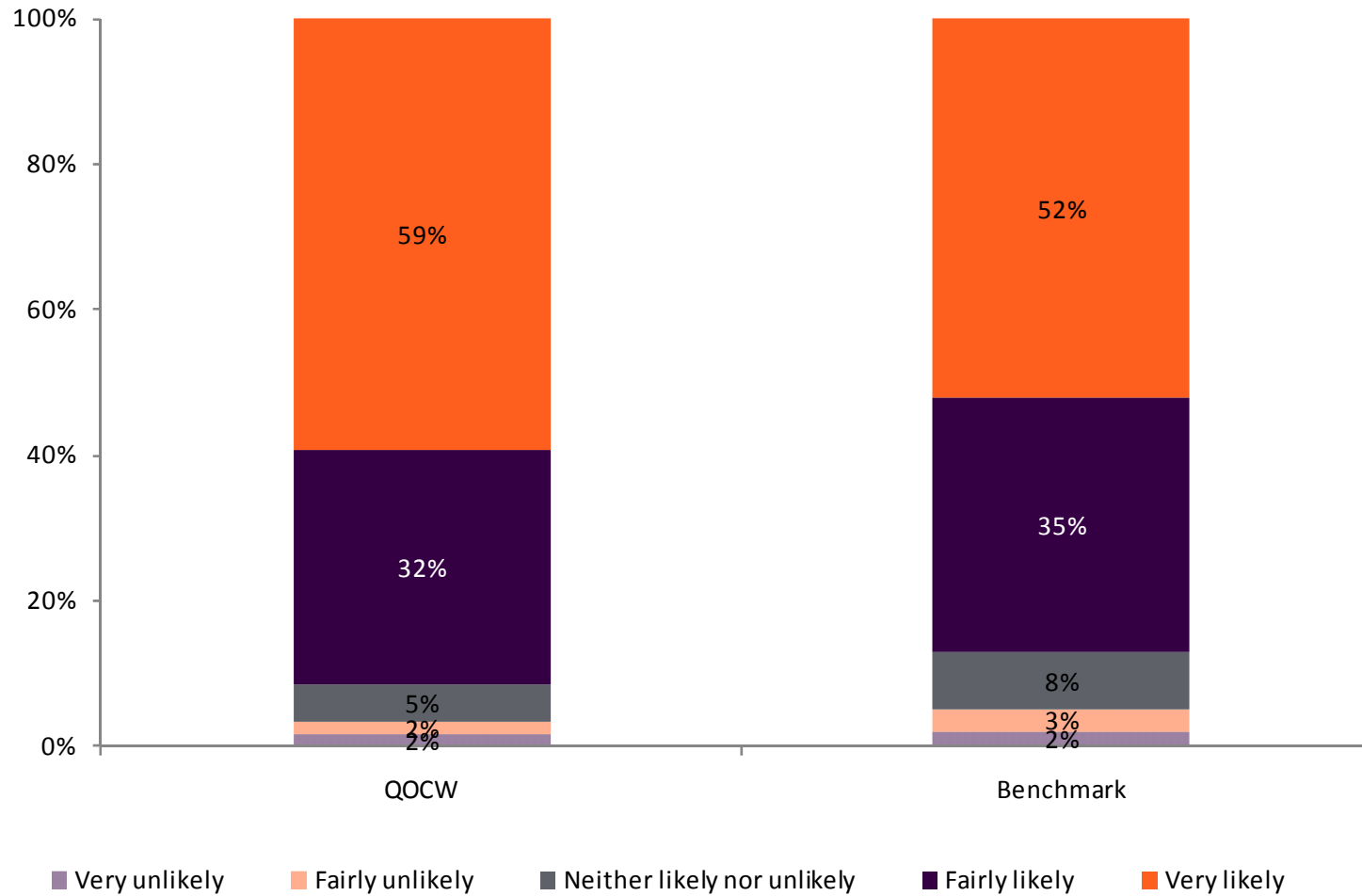
“What else about the Central West region were you particularly unhappy with on your recent visit?”

Visitors were unhappy with roads and some other facilities

- Roads:
 - *State of some sealed roads (very undulating) very narrow in places – no verges – particularly with road trains. (65+ years, First time visitor)*
 - *Road conditions for the amount now travelling especially for caravans sharing the road with road trains. (55 to 64 years, First time visitor)*
 - *Roads very narrow in places with bad edges. (65+ years, Repeat visitor)*
 - *Having to avoid road kill, swerving to not drive over. (55 to 64 years, First time visitor)*
- Other:
 - *The fact that somewhere as big as Longreach did not run tours etc. We did not end up staying and took our money with us. A very big letdown. (35 to 44 years, First time visitor)*
 - *Poor road conditions. Price hike in caravan park fee. Some personnel at same information centres could have been more helpful and more 'people friendly'. (55 to 64 years, First time visitor)*
 - *The amenity blocks in a lot of caravan parks. (45 to 54 years, Repeat visitor)*
 - *Some very poor caravan park amenity blocks. (65+ years, First time visitor)*

“What else about the Central West region were you particularly unhappy with on your recent visit?”

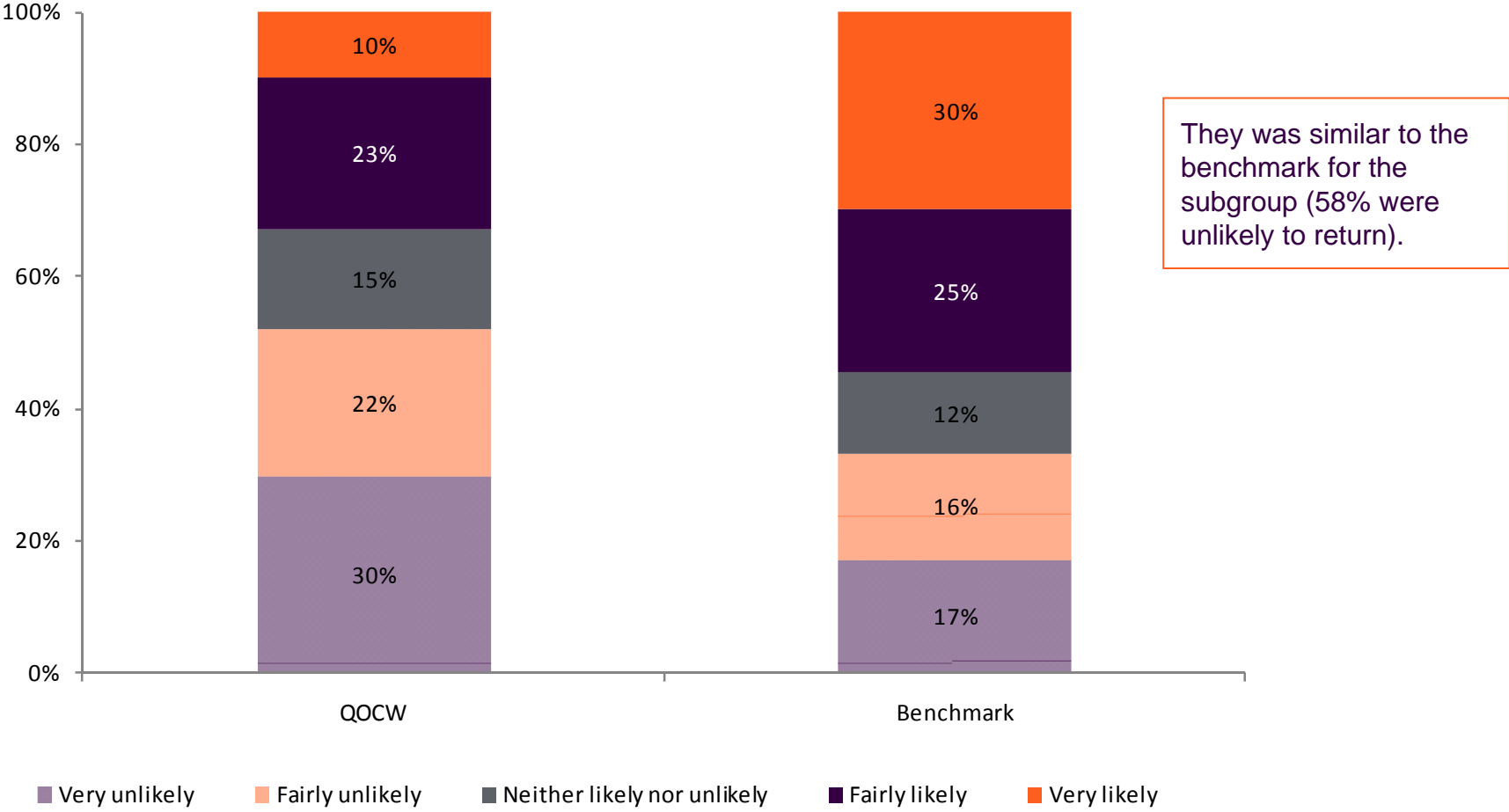
Recommendation was above the VPS benchmark



Base = 467

"How likely are you to recommend the Central West region to other people as a destination to visit?"

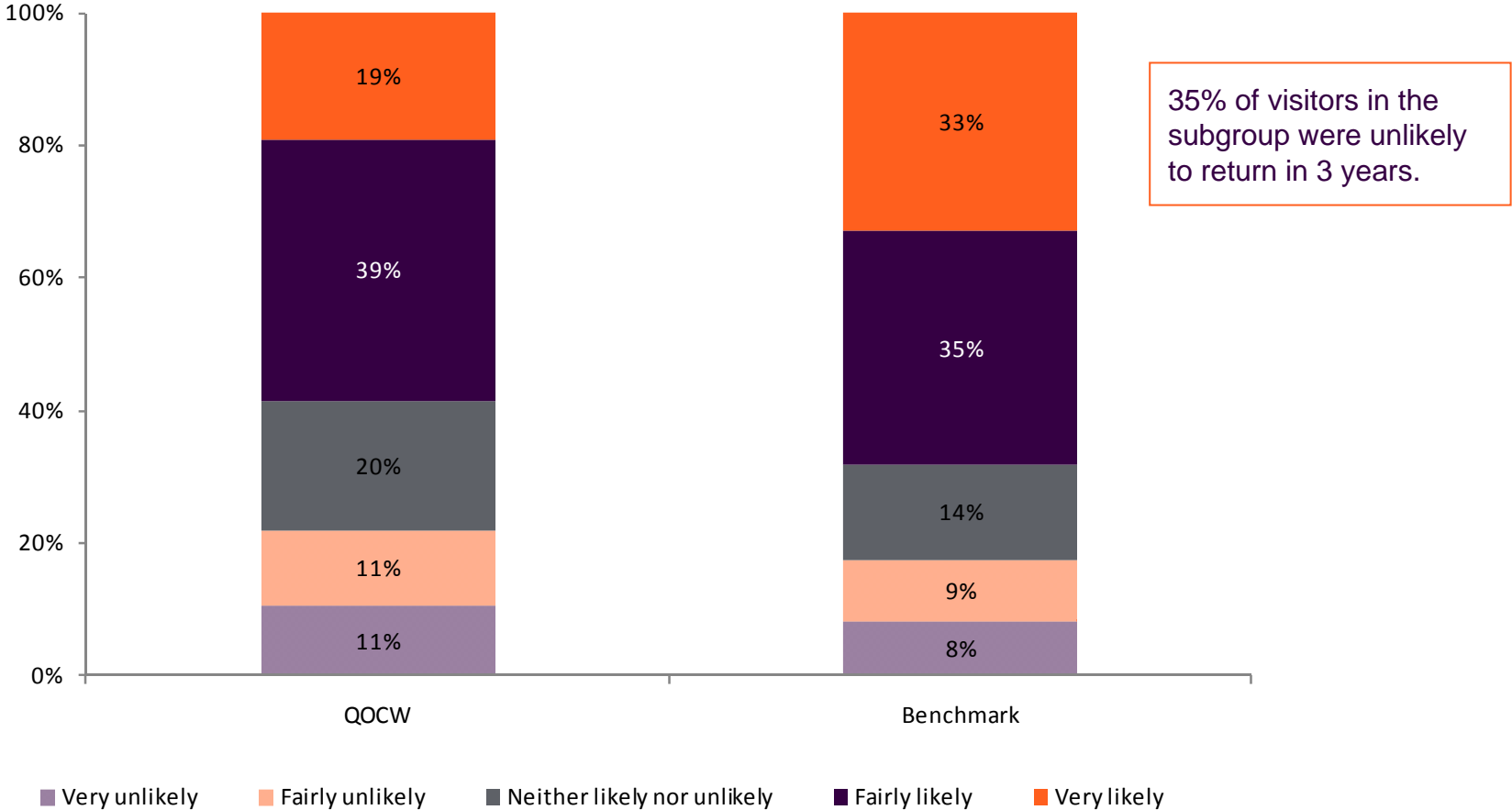
Visitors were unlikely to return in the next 12 months compared with the VPS benchmark



Base = 470

“How likely are you to return to the Central West region in the next 12 months?”

Visitors were also unlikely to return in the next 3 years compared with the VPS benchmark



Base = 414

“How likely are you to return to the Central West region in the next 3 years?”

Summary

- Fifty percent of visitors were very satisfied with the region overall. This was a similar proportion to the VPS benchmark.
- The proportion of intrastate visitors (57% very satisfied) and visitors who stayed in non caravan or camping accommodation (64% very satisfied) were most satisfied with their visit overall.
- *To experience our nation's/Australia's history, discover or learning something new, tour around and explore and an adventure* were experiences that were expected and rated as better than expected by visitors compared with the VPS benchmarks.
- *Food and wine experiences and enjoyable nightlife and entertainment* were experiences that were not expected but rated as better than expected compared with the VPS benchmarks.
- Over a fifth of visitors (22%) rated the region as *a place to offer strong indigenous experience* as worse than expected. This was a smaller proportion than both the VPS benchmark and the subgroup.

Summary

- *Friendly service* was the most important attribute for visitors with 52% rating it as very important. Sixty two percent of visitors were also very satisfied with this experience.
- The proportion who rated *food and beverage* and *local transport* as very important was less than the VPS benchmark. Satisfaction with *food and beverage* was rated below both the VPS and subgroup benchmarks.
- One attribute that was rated as important but visitors were less satisfied with compared with the VPS benchmark was *roads*. The issues with roads included.....
- Visitors were more satisfied overall with *commercial caravan or camping grounds* compared with the VPS benchmark.
- Although the proportion of visitors that were likely to recommend the region was above the VPS benchmark, the proportion likely to return was below the VPS benchmark.

Appendix



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



TRA TOURISM
RESEARCH
AUSTRALIA

Benchmark summary

- **Objective:** To allow destinations to compare the results from the Visitor Profile and Satisfaction (VPS) survey with results from other destinations
- **Sample size:** Relevant sample sizes appear in the first column on the first page
- **Significance testing:** No significance testing has been done on the figures
- **Categories:** Only standard categories are included – individual destinations may have included non-standard categories in their questionnaire that are not included in the summaries
- **Subgroup destinations:** The list of subgroup destinations appear on the first page of the summary. In most cases these were nominated by the destination or STO
- **Layout:**
 - **First page** - contains information that can be used to profile visitors to a region and to identify information and booking sources
 - **Second page** – contains information on visitor expectations and satisfaction including their likelihood to return

Benchmark summary

Three sets of results are included in each summary:

1. Average results for the destination
2. The difference between the average results for the destination and a nominated subgroup of destinations
3. The difference between the average results for the destination and all destinations


Key Metrics	Total Sat	V Sat
Overall Satisfaction	92%	58%
Difference to subgroup	↑ 4%	→ 0%
Difference to all	↑ 5%	→ 3%

Destination results

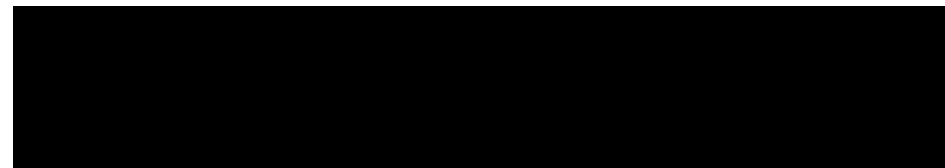
Benchmark summary

Dashboard symbols

 If a destination is more than 3 points above the subgroup or total

 If a destination is within +/- 3 points of the subgroup or total

 If a destination is less than 3 points below the subgroup or total



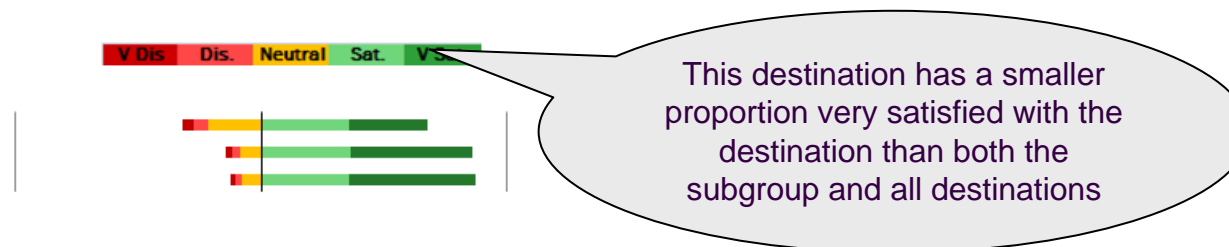
34% of respondents
travelled to the
region to visit
friends and relatives

That is 16
percentage points
more than the
subgroup

Benchmark summary

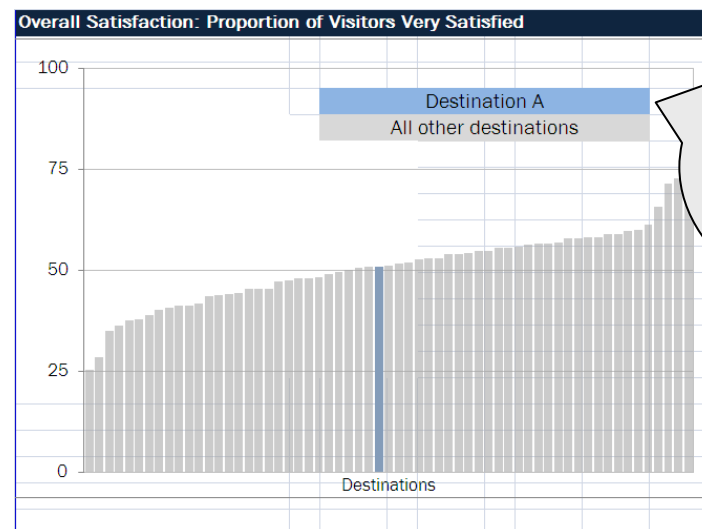
Bar charts: The small horizontal bar charts on the second page show the full results (that is all points on the scale) for the respective categories

- All data displayed are for a 5 point scale
- The upper 2 categories on the scale are recorded as positive values and appear on the right side of the vertical axis. These correspond to total satisfaction.
- The lower 3 categories on the scale are recorded as negative values and appear on the left side of the vertical axis



Benchmark summary

The large vertical bar chart on the second page shows the proportion of respondents in each destination that were 'Very satisfied' overall with their visit.



In terms of overall satisfaction, Destination A is close to average in terms of the total number of respondents who were very satisfied with their visit.