Central Australia Visitor Profile and Satisfaction Survey
Presentation outline

- Key findings
- Background to the VPS project
- Visitor and trip characteristics
- Why they visited the region and were they happy
- Attractions in Alice Springs
- Recommendations
Background to the Central Australia VPS project
Central Australia VPS project

- The Central Australia Visitor Profile and Satisfaction (VPS) project is part of the TRA Destination Visitor Survey Program

- Objectives of the project were to provide information on:
  - Visitor profile
  - Why visitors chose to visit the region
  - Expectations of the region
  - What visitors did here
  - Were they happy with their visit

- Recruitment during May and August 2011
Data collection

Recruitment
- Face-to-face intercept interviews at selected locations
  - Recruitment survey
    - Basic demographics
    - Expenditure
- Postcards left at different locations
- Main survey
  - Profiling
  - Travel paths
  - Expectations
  - Satisfaction
- Link to online survey
- Self completion (by mail)
Survey sample

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

International visitor sample mainly holiday leisure (89%), VFR (9%) and business (2%).

Sample
n = 533

Domestic visitors
n = 397 (75%)
(n=14 Domestic Day visitors)

International visitors
n = 129 (25%)

Holiday/leisure
n = 315 (80%)
NVS y/e Sept 2010 (55%)

VFR
n = 44 (11%)
NVS y/e Sept 2010 (10%)

Business
n = 26 (7%)
NVS y/e Sept 2010 (28%)

Other
n = 10 (3%)
NVS y/e Sept 2010 (9%)

NVS includes the Alice Springs, Central Desert and Yulara tourism regions.
VPS Benchmarks

- 76 VPS projects have been completed in Australian regional tourist destinations - VPS Benchmark Database.

- The VPS Benchmark is the average of all (unweighted) VPS destination projects with at least 50 respondents.

- Throughout this report, results from the Central Australian VPS are compared to the VPS Benchmark and in some cases to the ‘subgroup’.
Data also compared with a ‘subgroup’ of destinations. The ‘subgroup’ includes:

- Bendigo
- Broken Hill
- Cairns
- Coober Pedy
- Dubbo
- Queensland’s Outback Central West
- Wilpena
Key findings

1. The internet is a key source of information and booking before a visitor’s trip, with trip planning three months in advance for the majority.

2. A key strength of Central Australia is that the region is an iconic destination.

3. Many visitors indicated that they did not allocate enough time in the region to travel to other areas and in the case of Alice Springs, many agreed that there was more than they expected and a third would have stayed longer if they had more information.
4. Visitor satisfaction with Central Australia was similar to the national benchmark with three key positive drivers of satisfaction being the *variety of things to see and do*; *customer service in attractions*; and *customer service*. *Value for money* however was an issue for many visitors and pulled down satisfaction results.

5. There are opportunities for the development of family friendly activities as well as relaxation and rejuvenation experiences and providing opportunities for friends and family to spend quality time with each other.
Visitor and trip characteristics
Visitor profile (during the survey period)

- Trip purpose
- Age
- Life stage
- Travel party
- Origin
The majority of visitors visited for holiday/leisure purposes

- Holidays/leisure/relaxation/getting away: 79%
- Visiting friends/relatives: 11%
- Work or business: 4%
- Entertainment/attending a special event: 3%
- Conferences/exhibitions/conventions/trade fairs: 2%
- Sport: 0.2%
- Other: 2%

Compared to benchmarks:

- Holiday: 82% Central, 0% Subgroup, 5% All
- Visiting friends and relatives: 11% Central, 2% Subgroup, -2% All
- Business: 5% Central, 1% Subgroup, 1% All
- Other: 2% Central, -3% Subgroup, -3% All

Base = 530
Around a third of visitors were aged between 55 and 64 years.
Three in ten visitors were in the older non-working life stage

- Young/midlife single with no kids: 9% (Central Australia), 13% (Benchmark)
- Young/midlife couple with no kids: 11% (Central Australia), 12% (Benchmark)
- Family: 19% (Central Australia), 24% (Benchmark)
- Older working single/couple: 19% (Central Australia), 22% (Benchmark)
- Older non-working single/couple: 27% (Central Australia), 30% (Benchmark)

Derived variable from demographic questions

Base = 521
More than four in five visitors travelled with their partner

- **Partner**: 45% (Central Australia), 44% (Benchmark)
- **Immediate family**: 20% (Central Australia), 23% (Benchmark)
- **Friends and/or relatives**: 18% (Central Australia), 20% (Benchmark)
- **No one else (alone)**: 10% (Central Australia), 7% (Benchmark)
- **Other**: 7% (Central Australia), 5% (Benchmark)

“*How would you describe your travel party, that is, all persons with whom you directly travelled and shared most expenses? Travelled with ...*”
More than half of domestic visitors were from NSW or Victoria.

Compared to benchmarks:

<table>
<thead>
<tr>
<th>Origin</th>
<th>Central</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>25%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Domestic</td>
<td>75%</td>
<td>-14%</td>
<td>-13%</td>
</tr>
</tbody>
</table>
Trip planning and booking

- Past visitation
- Planning period
- Information sources
- Booking information
Nearly two thirds of visitors had not been to Central Australia previously

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

Base = 533

How many times have you visited Central Australia, including both day trips and overnight trips?

Median = 1 time

Base = 193

Median = 2 times

Base = 193
Almost two thirds of visitors planned more than three months in advance

<table>
<thead>
<tr>
<th>Trip Planning</th>
<th>Central</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>On the road</td>
<td>4%</td>
<td>-5%</td>
<td>-5%</td>
</tr>
<tr>
<td>In the month before</td>
<td>9%</td>
<td>-13%</td>
<td>-28%</td>
</tr>
<tr>
<td>1 to 3 months</td>
<td>23%</td>
<td>-5%</td>
<td>-2%</td>
</tr>
<tr>
<td>More than 3 months</td>
<td>65%</td>
<td>23%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Compared to benchmarks

“When was the decision made to visit Central Australia?”

Base = 504
The majority of visitors used a combination of internet and non-internet sources.

- **No research**: Central Australia = 3%, Benchmark = 9%
- **Friends, relatives, been there before**: Central Australia = 5%, Benchmark = 23%
- **Internet only**: Central Australia = 17%, Benchmark = 19%
- **Non-internet only**: Central Australia = 26%, Benchmark = 26%
- **Combination**: Central Australia = 24%, Benchmark = 50%

Note: ‘Friends, relatives, been there before’ may be used in combination with other categories (excludes ‘No research’).
Visitors mainly used search engines and airline and accommodation websites for information.

The chart shows that visitors primarily used search engines (59%), followed by airline company sites (56%) and accommodation operator sites (44%). Other notable sites include Offical Government and Tourism sites (35%), 3rd party accommodation sites (24%), Car hire company sites (22%), Testimonial sites (19%), Travel Guide sites (16%), and 3rd party airline sites (13%).

Other sites mainly included online blogs and operator specific sites. The chart also indicates that visitors used other sources such as Travel sections on news portal sites (4%), Social media/community sites (3%), Other type of sites (9%), and Travel agency sites (10%).

Base = 327

You mentioned that you used the internet for research. What are the type of websites you went to?
The majority of visitors used the internet for bookings

The majority of visitors used the internet for bookings.

Other sources were mainly via calling directly.

Compared to benchmarks.

The internet (Online) 59%
Travel agent (Not online) 25%
Motoring Associations 9%
Tourist office/visitor information centre... 5%
The local Visitor Information Centre - before... 5%
The local Visitor Information Centre - after l... 4%
Real estate agent for holiday house/unit... 1%
Other 9%
None 10%

Greater than the benchmarks.

Which of the following did you use to make bookings for this trip to Central Australia?

<table>
<thead>
<tr>
<th>Prior Bookings - Non internet</th>
<th>Central</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>No prior bookings made</td>
<td>10%</td>
<td>-21%</td>
<td>-26%</td>
</tr>
<tr>
<td>Travel Agents</td>
<td>25%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Tourist offices/Visitor Information Centres</td>
<td>12%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Motoring associations</td>
<td>9%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>No prior bookings made on internet</td>
<td>41%</td>
<td>-12%</td>
<td>-14%</td>
</tr>
</tbody>
</table>

Base = 482

‘Which of the following did you use to make bookings for this trip to Central Australia?’
Visitors mainly made internet bookings via airline and accommodation websites.

- **Airline company sites**: 61%
- **Accommodation operator sites**: 44%
- **Search engine**: 35%
- **3rd party accommodation sites**: 24%
- **Car hire company sites**: 24%
- **Official Government and Tourism sites**: 22%
- **3rd party airline sites**: 13%
- **Testimonial sites**: 11%
- **Travel agency sites**: 9%
- **Travel Guide sites**: 8%
- **3rd party car hire sites**: 5%
- **Travel sections on news portal sites**: 3%
- **Social media/community sites**: 2%
- **Other type of sites**: 4%

You mentioned that you used the internet for booking. What are the type of websites you went to? (Base = 282)
A quarter of visitors used www.centralaustraliantourism.com

- www.centralaustraliantourism.com: 27% Yes, 62% No, 12% Don't know (n = 360)
- www.travelnt.com: 15% Yes, 75% No, 9% Don't know (n = 351)
- www.territorydiscoveries.com: 13% Yes, 76% No, 11% Don't know (n = 353)
- Tourism NT's Facebook page: 1% Yes, 92% No, 7% Don't know (n = 348)

“Did you use any of the following specific websites prior to your trip to Central Australia?”
Airline websites were the most useful

- Airline company sites: 24%
- Search engine: 18%
- Official Government and Tourism sites: 17%
- Accommodation operator sites: 11%
- 3rd party accommodation sites: 5%
- 3rd party airline sites: 5%
- Testimonial sites: 4%
- Travel agency sites: 3%
- Car hire company sites: 3%
- www.centralaustralian tourism.com: 2%
- Travel Guide sites: 2%
- www.travelnt.com: 1%
- www.territorydiscoveries.com: 0.3%
- Social media/community sites: 0.3%
- 3rd party car hire sites: 0.3%
- Other type of sites: 4%

Base = 362

“Of the websites you used prior to your trip to Central Australia, which did you find most useful?”
Getting to and around Central Australia

- Transport used
- Routes taken in and out
Visitors either flew into the region or drove their own vehicle

- Air transport: 49%
- Private/own vehicle: 33%
- Bus/coach: 7%
- Railway: 6%
- Rented/hire vehicle: 4%
- Other: 2%

Compared to benchmarks:

- Self drive: 37% (↓-42%)
- Air travel: 49% (↑37%)

“What was the main form of transport that you used to get to Central Australia?”
Routes used to get to Central Australia

Which route did you mainly travel to get to Central Australia?

Base = 193

“Which route did you mainly travel to get to Central Australia?”
Which route did you mainly travel to leave Central Australia?
Staying in Central Australia

- Length of stay
- Accommodation used
- Locations visited
More than four in five visitors who stayed overnight stayed for more than four nights.

- Nights in Central Australia:
  - Median = 6 nights
  - 38% stayed 4 to 7 nights
  - 45% stayed 1 night
  - 11% stayed 2 nights
  - 5% stayed 3 nights
  - 2% stayed more than 7 nights

- Nights for entire trip:
  - Median = 15 nights
  - 77% stayed 4 to 7 nights
  - 18% stayed 1 night
  - 3% stayed 2 nights
  - 2% stayed 3 nights

Base = 511

“Nights in Central Australia” and “Nights for entire trip” refer to different questions:

- "How many nights did you stay in Central Australia during this trip?"
- "In total, how many nights did you stay away from home for your entire trip?"
Visitors stayed mainly in commercial caravan or camping grounds and standard hotels.

- **Caravan park or commercial camping ground**: 34%
- **Standard hotel/motel/motor inn/resort (below 4 star)**: 21%
- **Luxury hotel/luxury resort (4 or 5 star)**: 12%
- **Friends or relatives property (no payment required)**: 12%
- **Backpacker/visitor hostel**: 8%
- **Caravan or camping by side of road, on private property**: 5%
- **Serviced apartment**: 4%
- **Rented house/apartment/unit/holiday flat**: 4%
- **Other**: 10%
- **Base = 502**

“What type of accommodation did you mainly use in Central Australia?”
Places visited during trip – places stopped at

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

Median Number of Stops in the region = 5
Places visited during trip – day visit

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

Percentages are expressed as the percentage of all visits (day and overnight) to each town.

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

Median Number of Day Stops in the region = 2
Places visited during trip – stopped overnight

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

Percentages are expressed as the percentage of all visits (day and overnight) to each town.

*Small base.

Median Number of Overnight Stops in the region = 2
Summary: Visitor and trip characteristics

- Mainly holiday leisure visitors
- Older life stages travelling as a couple or with friends and/or relatives
- Family life stage travelling with their family
- Domestic visitors from New South Wales and Victoria
- International visitors from Europe and North America
- First time visitors
- Mainly overnight trips – 4+ nights
- Overnight visitors stayed at commercial caravan or camping grounds, or standard hotels/motels
Summary: Visitor and trip characteristics

- Planned the trip more than three months before
- The internet, travel guides, brochures and Visitor Information Centres used for information
- Highest proportion of visitors used the internet to make bookings
- Bookings through internet –
  - Airline and accommodation operator sites
- Alice Springs, Yulara and Kings Canyon main towns visited –
  - Overnight destinations
Why they visited Central Australia and were they happy
Reasons for visiting Central Australia

- Reasons for choosing destination
- Expectations of experiences
The region is an iconic Australian destination

- To visit an iconic Australian destination: 66%
- To experience nature: 31%
- There's a variety of things to see and do: 26%
- To visit a specific attraction(s): 25%
- To learn about the natural environment: 19%
- To relax and rejuvenate: 19%
- To learn about Aboriginal culture: 19%
- It's a place that is untouched, undeveloped: 18%
- It is a great place to spend time with my partner: 11%
- It was recommended by friends/travel agent: 11%

- Main reasons
- Most important reason
Why did you choose Central Australia?

Which of the following was most important in choosing Central Australia?

- It's a great place for a family holiday
- To attend a specific event or exhibition
- It was a convenient stop-over point
- Good deals on accommodation
- There were good deals on air fares
- To attend a conference
- For business

Main reasons

Most important reason

For business: 1%
To attend a conference: 1%
There were good deals on air fares: 2%
Good deals on accommodation: 4%
It was a convenient stop-over point: 7%
It's a great place for a family holiday: 8%
To attend a specific event or exhibition: 7%

Bases: All respondents Main reason = 506
All respondents Most important = 496
Visitors expected nature, exploring, adventure, history, art and culture experiences

More than 3 points above the VPS benchmark
“Which, if any, of the experiences listed below did you expect Central Australia to offer?”

- **Relaxation and rejuvenation**: 76% Benchmark, 69% Central Australia
- **Spend quality time with partner/family/friends**: 71% Benchmark, 61% Central Australia
- **Bush tucker experience**: 37% Benchmark, 32% Central Australia
- **Something the kids would enjoy**: 32% Benchmark, 24% Central Australia
- **Luxury and indulgence**: 24% Benchmark, 18% Central Australia
- **Good shopping**: 36% Benchmark, 15% Central Australia
- **Enjoyable nightlife and entertainment**: 20% Benchmark, 14% Central Australia
- **Golfing experience**: 4% Benchmark, 20% Central Australia

Base = 531
What did they do in Central Australia?

- Activities
- Attractions visited
Visitors did general sightseeing and saw national/state parks

- General sightseeing: 73% (Central Australia), 83% (Benchmark)
- Visit National Parks/State Parks: 33% (Central Australia), 81% (Benchmark)
- Eat out at a hotel/restaurant/clubs/coffee shops: 68% (Central Australia), 79% (Benchmark)
- Go shopping: 55% (Central Australia), 67% (Benchmark)
- Short walk (less than 2 hours): 63% (Central Australia)
- Visit attractions: 60% (Central Australia)
- Visit a cultural centre: 58% (Central Australia)
- Visit history/heritage buildings, sites or monuments: 31% (Central Australia), 56% (Benchmark)
- Visit museums or art galleries: 26% (Central Australia), 49% (Benchmark)
- Day walk (2 to 8 hours): 26% (Central Australia), 48% (Benchmark)
- Go on an organised tour: 17% (Central Australia), 46% (Benchmark)
- Go to the markets: 21% (Central Australia), 30% (Benchmark)
- Visit botanical or other gardens: 17% (Central Australia), 33% (Benchmark)
- Picnics/BBQ's: 4% (Central Australia), 26% (Benchmark)
- Go four wheel driving: 26% (Central Australia)

This chart continued on next slide…
On this trip to Central Australia, which of the following activities did you undertake?

- Bird watching: 21% (Central Australia), 9% (Benchmark)
- Visit friends & relatives: 22% (Central Australia), 17% (Benchmark)
- Camel riding: 14% (Central Australia), 6% (Benchmark)
- Go on an Aboriginal guided tour: 14% (Central Australia), 6% (Benchmark)
- Swimming at waterholes: 13% (Central Australia), 5% (Benchmark)
- Scenic flights: 13% (Central Australia), 6% (Benchmark)
- Rock climbing: 7% (Central Australia), 6% (Benchmark)
- Attend conference or exhibition: 5% (Central Australia), 2% (Benchmark)
- Hike along the Larapinta trail: 4% (Central Australia), 2% (Benchmark)
- Business: 4% (Central Australia), 4% (Benchmark)
- Hot air ballooning: 2% (Central Australia), 4% (Benchmark)
- Cycling along the Simpsons Gap Bike Path: 2% (Central Australia), 5% (Benchmark)
- Mountain biking: 5% (Central Australia), 2% (Benchmark)
- Quadbiking: 6% (Central Australia), 1% (Benchmark)
- Overnight walk: 1% (Central Australia), 4% (Benchmark)
- Golf: 1% (Central Australia), 4% (Benchmark)

'Cycling', 'Cycling along the Simpsons Gap bike path' and 'Mountain biking' are benchmarked together in the VPS benchmark as 'Cycling'.

'Camel riding', 'Rock climbing' and 'Quadbiking' are benchmarked together in the VPS benchmark as 'Other outdoor activities'.

Base = 528
Natural attractions were the most visited attractions – particularly Uluru

- Uluru / Kata Tjuta National Park: 76%
- Anzac Hill: 57%
- Watarrka (Kings Canyon) National Park: 47%
- Alice Springs Desert Park: 44%
- Alice Springs Telegraph Station: 41%
- Simpsons Gap: 40%
- Standley Chasm: 36%
- Royal Flying Doctor Service Visitor Centre: 36%
- Glen Helen Gorge: 33%
- Ormiston Gorge: 32%
- Alice Springs School of the Air Visitor Centre: 27%
- Flynn's Grave: 25%
- Alice Springs Reptile Centre: 23%
- Ellery Creek Big Hole: 21%

Attraction satisfaction:
- Central: 61%
- Difference to subgroup: 6%
- Difference to all: 12%

This chart continued on next slide...
Old Timers Museum
Stuart Town Gaol
Trephina Gorge Nature Park
Adelaide House & John Flynn Memorial Uniting Church
Mbantua Gallery & Cultural Museum
Palm Valley
Araluen Cultural Precinct
Olive Pink Botanical Garden
National Pioneer Women's Hall of Fame
Hermannsburg Heritage Precinct
Mt Conner
National Road Transport Hall of Fame

……... continued from previous slide
“Please select all the attractions that you visited in Central Australia, only selecting those attractions that you actually stopped at.”
Visitors were impressed with the Uluru Kata Tjuta and Watarrka National Parks

Loved the natural beauty of Uluru-Kata Tjuta National Park & overall landscape so different from any other place I've been to

Impressed with the cleanliness, organisation and general care of Kings Canyon and Uluru/Kata Tjuta. Very well done

The natural beauty of the outback, the base walk at Ayers rock and Olga's, the Kings Canyon rim walk. The Cultural Centre was well set out and the outdoors BBQ's a good idea

Ayers Rock was stunning and I was happy with the information we were given by our driver which enhanced our visit

“What else about Central Australia were you particularly happy with on your recent visit?”
We were very impressed with nature. Uluru and Kata Tjuta were amazing sites. The desert in full bloom wonderful.

The natural beauty of the outback, the base walk at Ayers rock and Olga's. Also Kings Canyon rim walk.

Uluru Kata Tjuta was very special.

I was impressed with the cleanliness, organisation and general care of Kings Canyon and Uluru/Kata Tjuta. Parks of same level in the US are not as clean or neat or well maintained, especially ones with as many tourists. Very well done.

“What else about Central Australia were you particularly happy with on your recent visit?”
Visitor satisfaction in Central Australia

- Overall satisfaction
- Were expectations met
- Satisfaction with destination attributes
- Recommendation
- Revisitation
A similar proportion of visitors were very satisfied compared with the benchmarks.
Younger, international, first time and coach/rail visitors were less satisfied

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

Benchmark

Central Australia - All visitors

Travel with friends/relatives

Travel as a family group

Travel as a couple

Travel as a couple

Travel alone

Repeat visitor

First time visitor

Domestic visitor

International visitors

Older non-working single/couple

Older working single/couple

Family

Young/midlife singles/couples with no kids

Rail/coach visitor

Drive

Fly

53% 56% 61% 63% 56% 51% 46% 42% 51% 56% 51% 48% 46% 53% 54% 0% 10% 20% 30% 40% 50% 60% 70%
All expected experiences were better than expected compared with the benchmarks

- Nature based experiences: 65% Better than expected, 32% As expected, 2% Worse than expected
- An adventure: 60% Better than expected, 38% As expected, 2% Worse than expected
- Discover or learn something new: 58% Better than expected, 40% As expected, 3% Worse than expected
- Tour around and explore: 58% Better than expected, 38% As expected, 4% Worse than expected
- Spend quality time with partner/family/friends: 50% Better than expected, 48% As expected, 2% Worse than expected
- Experience local attractions: 50% Better than expected, 45% As expected, 4% Worse than expected
- Experience our nation's/Australia's history: 50% Better than expected, 47% As expected, 4% Worse than expected
- Experience local history and heritage: 49% Better than expected, 47% As expected, 4% Worse than expected

More than 3 points above the VPS benchmark

This chart continued on next slide……
<table>
<thead>
<tr>
<th>Experience</th>
<th>Better than expected</th>
<th>As expected</th>
<th>Worse than expected</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experience arts or culture</td>
<td>44%</td>
<td>50%</td>
<td>6%</td>
<td>415</td>
</tr>
<tr>
<td>Experience Aboriginal arts and culture</td>
<td>43%</td>
<td>49%</td>
<td>8%</td>
<td>382</td>
</tr>
<tr>
<td>Relaxation and rejuvenation</td>
<td>40%</td>
<td>54%</td>
<td>5%</td>
<td>360</td>
</tr>
<tr>
<td>Something the kids would enjoy</td>
<td>36%</td>
<td>59%</td>
<td>5%</td>
<td>13</td>
</tr>
<tr>
<td>Good shopping</td>
<td>35%</td>
<td>57%</td>
<td>8%</td>
<td>79</td>
</tr>
<tr>
<td>Luxury and indulgence</td>
<td>31%</td>
<td>60%</td>
<td>9%</td>
<td>97</td>
</tr>
<tr>
<td>Bush tucker experience</td>
<td>30%</td>
<td>57%</td>
<td>13%</td>
<td>193</td>
</tr>
<tr>
<td>Enjoyable nightlife and entertainment</td>
<td>30%</td>
<td>58%</td>
<td>12%</td>
<td>74</td>
</tr>
<tr>
<td>Golfing experience</td>
<td>20%</td>
<td>70%</td>
<td>10%</td>
<td>20*</td>
</tr>
</tbody>
</table>

* Small Base

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

More than 3 points above the VPS benchmark
Which, if any, of the experiences listed below did you expect Central Australia to offer?

If you answer YES, please indicate how well the region met this expectation.

Areas for opportunity:
- Good shopping
- Relaxation and rejuvenation
- Spend quality time with partner/family/friends
- Enjoyable nightlife and entertainment
- Something the kids would enjoy

Expectations are being met:
- Experience our nation's/Australia's history
- Discover or learn something new
- Nature based experiences
- Aboriginal art and cultural experience
- Experience arts or culture

Experience was expected
Experience was expected but better than expected
Experience was not expected
Experience was not better than expected
Personal safety and security, cleanliness and attractions were most important to visitors

- Personal safety and security: 50% Very important, 38% Important, 9% Neither important nor unimportant, 3% Not important, 1% Not at all important (n = 516)
- Clean environment (e.g., fresh air): 40% Very important, 49% Important, 9% Neither important nor unimportant, 1% Not important, 1% Not at all important (n = 517)
- Attractions: 39% Very important, 46% Important, 11% Neither important nor unimportant, 2% Not important, 2% Not at all important (n = 523)
- Value for money: 35% Very important, 50% Important, 11% Neither important nor unimportant, 3% Not important, 1% Not at all important (n = 515)
- Public toilets: 34% Very important, 42% Important, 18% Neither important nor unimportant, 4% Not important, 2% Not at all important (n = 517)
- Signage: 34% Very important, 37% Important, 20% Neither important nor unimportant, 5% Not important, 4% Not at all important (n = 501)
- Customer service in attractions: 31% Very important, 49% Important, 15% Neither important nor unimportant, 4% Not important, 2% Not at all important (n = 514)
- Customer service: 30% Very important, 53% Important, 14% Neither important nor unimportant, 2% Not important, 1% Not at all important (n = 518)
- Variety of things to see and do: 30% Very important, 58% Important, 11% Neither important nor unimportant, 1% Not important, 1% Not at all important (n = 518)
- Information services: 27% Very important, 48% Important, 18% Neither important nor unimportant, 4% Not important, 4% Not at all important (n = 509)

More than 3 points above the VPS benchmark

This chart continued on next slide……
“Again, thinking about your most recent trip to Central Australia, how important or unimportant was …”
Visitors were most satisfied with the attractions and variety of things to see and do.
Driver of overall satisfaction

Customer service: 37% Very satisfied, 45% Fairly satisfied, 15% Neither satisfied nor dissatisfied, 3% Dissatisfied (n = 509)

Signage: 36% Very satisfied, 41% Fairly satisfied, 20% Neither satisfied nor dissatisfied, 3% Dissatisfied (n = 483)

Commercial accommodation: 30% Very satisfied, 38% Fairly satisfied, 25% Neither satisfied nor dissatisfied, 7% Dissatisfied (n = 463)

Food and beverage: 28% Very satisfied, 47% Fairly satisfied, 18% Neither satisfied nor dissatisfied, 7% Dissatisfied (n = 511)

Public toilets: 26% Very satisfied, 38% Fairly satisfied, 23% Neither satisfied nor dissatisfied, 13% Dissatisfied (n = 495)

Local transport: 20% Very satisfied, 26% Fairly satisfied, 47% Neither satisfied nor dissatisfied, 8% Dissatisfied (n = 371)

Value for money: 18% Very satisfied, 42% Fairly satisfied, 24% Neither satisfied nor dissatisfied, 15% Dissatisfied (n = 506)

Shopping: 15% Very satisfied, 34% Fairly satisfied, 45% Neither satisfied nor dissatisfied, 6% Dissatisfied (n = 477)

Entertainment/nightlife: 8% Very satisfied, 25% Fairly satisfied, 64% Neither satisfied nor dissatisfied, 3% Dissatisfied (n = 365)

Free Wi-fi access: 5% Very satisfied, 11% Fairly satisfied, 60% Neither satisfied nor dissatisfied, 23% Dissatisfied (n = 372)

"And how satisfied or dissatisfied were you with… . "
“Again, thinking about your most recent trip to Central Australia, how important or unimportant was …”

“And how satisfied or dissatisfied were you with …”
Domestic visitors

Again, thinking about your most recent trip to Central Australia, how important or unimportant was …

And how satisfied or dissatisfied were you with….

Areas for improvement

“Again, thinking about your most recent trip to Central Australia, how important or unimportant was …”

“And how satisfied or dissatisfied were you with…. ”
Again, thinking about your most recent trip to Central Australia, how important or unimportant was …

And how satisfied or dissatisfied were you with….

Areas for improvement

“Again, thinking about your most recent trip to Central Australia, how important or unimportant was …”

“And how satisfied or dissatisfied were you with…..”
Visitors were happy with the culture and history…

Enjoyed talking to local aboriginal people and learning about their culture

I absolutely loved all the information about Aboriginal culture and information especially information about sacred sites and dreaming

There was plenty of history to read about every day living in the north that you never hear about

“What else about Central Australia were you particularly happy with on your recent visit?”
The package tour was great. The guide did an amazing job like entertaining during bus riding and explaining the places by cultural and historical aspects.

The excellence of the tour guides’ knowledge and presentation. Experiencing the real thing is SO different from reading about it or seeing it on TV.

Tour operators and guides were very friendly and know their stuff.

Having an Aboriginal tour guide around Uluru!

“What else about Central Australia were you particularly happy with on your recent visit?”
...and the friendliness of the locals

Loved every minute of it, the people are wonderful

All in all I was surprised by the people they were amazing and fun the places were interesting but it was the people that made it memorable

Like the community spirit that exists amongst locals. I know many people who have lived there for 20+ years

The hospitality, the good guide, the contacts with local people: they gave us the best information and tips

“What else about Central Australia were you particularly happy with on your recent visit?”
Visitors were unhappy with accommodation…

The cost of accommodation in comparison to quality. This was experienced everywhere outside of Alice Springs. I understand that they are remote locations but the trip was extremely expensive.

Camping ground expensive. Perhaps some competition would see the caravan sites upgraded and the fees reduced.

The hotel was not the best experience. The room service and restaurant service at the hotel was lacking (very slow and inaccurate) - the staff need more training.

“What else about Central Australia were you particularly unhappy with on your recent visit?”
... safety and security...

Being told by more than one local not to go out alone at night for fear of being mugged/stabbed.

Lots of locals just hanging around, felt a bit nervous. We were told not to go out at night because it was dangerous.

The car hire operator in Alice told me there was a high rate of crime in Alice and I needed to take additional insurance. Not a good public image.

Feeling of safety especially with gangs of troublemakers around Alice springs.

“What else about Central Australia were you particularly unhappy with on your recent visit?”
The tours on offer were too expensive, especially for a family. We had the impression that since you were there and you wanted to see the sites, you are prepared to pay any price.

Accommodation expensive, as were restaurants. Poor local transport. Fuel disproportionately expensive. Expensive for pensioners.

Disappointing to pay so much to enter Ayres Rock and the Olgas National Park. It appeared to be a money grabbing exercise.

Prices! We came 50,000 miles to get to Ayers Rock and yet we couldn't afford to have proper tours. We should have hired a car and made our own way.

“What else about Central Australia were you particularly unhappy with on your recent visit?”
... and public amenities

Really unhappy about having to pay to use the public toilets in the shopping malls.

Some public toilets were disgusting to take little kids into.

Lack of toilets in some roadside picnic areas. Where no toilets were available we were faced with disgusting sight of tissue paper blowing around.

“What else about Central Australia were you particularly unhappy with on your recent visit?”
Visitors were hoping for more Indigenous involvement

The lack of personal Aboriginal culture at Yulara and the cultural centre and lack of Aboriginal involvement around Yulara, at the national park and cultural centre. Everything was recorded and pictures.

Disappointed that most people working in hospitality are from overseas countries and not our own Indigenous people.

Was disappointed at the lack of obvious Indigenous support to conservation, tour guides around Uluru etc. Did not see one Indigenous person, yet this whole area is about our Indigenous population and the history within.

There was rarely an Aboriginal working in Uluru, Kings Canyon. I would love to see them embrace their ownership of the land more.

“What else about Central Australia were you particularly unhappy with on your recent visit?”
Visitors were very likely to recommend Central Australia

“How likely are you to recommend Central Australia to other people as a destination to visit?”

Base = 532
Visitors were unlikely to return in the next 12 months

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

Base = 531

Central Australia:
- Very unlikely: 39%
- Fairly unlikely: 17%
- Neither likely nor unlikely: 24%
- Fairly likely: 15%
- Very likely: 12%

Benchmark:
- Very unlikely: 31%
- Fairly unlikely: 24%
- Neither likely nor unlikely: 12%
- Fairly likely: 15%
- Very likely: 17%
But they were likely to return within three years

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

Base = 461
Summary:
Why they visited and were they happy

- Reasons for visiting revolved around:
  - Iconic Australia destination
  - Experience nature
  - Variety of things to see and do
  - Visit specific attractions

- Activities and attractions revolved around general sightseeing, national parks, natural attractions and landmarks, eating out and shopping
Summary:
Why they visited and were they happy

- Overall satisfaction highest for those travelling with their friends/relatives, older non-working singles/couples, repeat visitors and domestic visitors
- Overall satisfaction driven by variety of things to see and do, customer service and value for money
- Satisfaction with attractions, variety of things to see and do, tours and local transport above the benchmarks
- Attributes that visitors were unhappy with included parking, traffic congestion, signage, public toilets, local transport, shop opening hours and the price of some attractions
Alice Springs & commercial attractions
Alice Springs and commercial attractions

- Description of Alice Springs
- Awareness of the range of things to do
- Commercial attractions
- Improvements
Alice Springs was a better experience than visitors expected

There was a lot more to do in Alice Springs than I expected
- Strongly Agree: 26%
- Agree: 37%
- Neither agree or disagree: 25%
- Disagree: 11%
- Strongly disagree: 2%

Alice Springs was a great experience that you can’t get in any other state in Australia
- Strongly Agree: 23%
- Agree: 35%
- Neither agree or disagree: 26%
- Disagree: 11%
- Strongly disagree: 4%

Alice Springs was better than I expected
- Strongly Agree: 23%
- Agree: 38%
- Neither agree or disagree: 26%
- Disagree: 10%
- Strongly disagree: 3%

Alice Springs was a great place to immerse myself in local culture
- Strongly Agree: 18%
- Agree: 34%
- Neither agree or disagree: 36%
- Disagree: 11%
- Strongly disagree: 2%

Alice Springs was only used as a base to explore the outer regions
- Strongly Agree: 13%
- Agree: 24%
- Neither agree or disagree: 32%
- Disagree: 24%
- Strongly disagree: 7%

“Below are some statements which could be used to describe Alice Springs. On a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, how strongly do you agree or disagree with each of the statements?”
Alice Springs was a surprise

I didn't expect so many things to see around Alice Springs.

Alice Springs was much nicer than expected as media reports highlight the bad points not the multicultural side.

I enjoyed spending time with my friend who had lived in Alice for 6 months. I was impressed how the local attractions look after the locals so they didn't have to pay multiple times for visiting (taking visitors).

There is a lot more to Alice Springs than many people imagine, I now know!

“What else about Central Australia were you particularly happy with on your recent visit?”
Two in five visitors weren’t aware of the range of things to do in Alice Springs

- Yes aware of the range of things to see and do in Alice Springs prior to visit
- Not aware of the range of things to see and do in Alice Springs prior to visit

“Were you aware of the range of things to see and do prior to your visit?”

Base = 468
But a third would have stayed longer had they known more.

“If you had known, would you have extended your stay?”

Base = 186
The majority of visitors who didn’t visit a commercial attraction didn’t do so because of time.

- Yes visited a commercial attraction in Alice Springs during trip: 27%
- No didn’t visit a commercial attraction in Alice Springs during trip: 73%

“Did you go to a commercial attraction in Alice Springs during this trip?”

“Why didn’t you go to a commercial attraction in Alice Springs?”

- No time: 47%
- Nothing that interests me: 21%
- Not aware of attractions in the area: 11%
- Have been before: 11%
- Other: 10%

Base = 460
Base = 126
Visitors were generally* most satisfied with friendliness and knowledge of staff.

*Average across all commercial attractions included

"Thinking of your visit to the <attraction>, how satisfied or dissatisfied were you with the following aspects on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied."
Alice Springs attractions compared favourably to others in Australia...

All very different and unique, haven't any other similar in Australia yet so for us they were great.

Exceeded my expectations really enjoyed myself. More laid back and inviting than other states.

Right up there – we have been on the road for 2.5 years, and seen museums and scenery everywhere! Scenery here is breathtaking!

“How did these attractions compared to others across Australia?”
… and Alice Springs was considered unique

Alice Springs and attractions are quite unique. It’s impossible to compare.

They are uniquely Alice Springs as a group

I do think that central Australia is unique in the world.

Alice Springs is a unique area of Australia.

“How did these attractions compared to others across Australia?”
Indigenous involvement, value for money, signage and access could improve the attractions

By engaging the traditional owners and having more Indigenous people working in various roles with the ability to interact confidently with people in their own way.

Perhaps some more signs to read with interesting background information.

I have limited mobility. I always looked to see how much walking might be involved. I dismissed many attractions.

Maybe a two day pass or return pass for the second day for free as the museum had so much to see and do and 8 hours just wasn’t enough.

“How could these attractions be improved?”
Summary: Attractions in Alice Springs

- A lot more to do in Alice Springs than expected & Alice Springs was better than expected

- Alice Springs was:
  - A great experience you can’t get anywhere else
  - A great place to immerse in local culture

- Some visitors weren’t aware of the range of things to see and do in Alice Springs prior to their visit
  - A third would have extended their stay if they knew

- Some visitors didn’t visit a commercial attraction in Alice Springs
  - Because not enough time / nothing of interest
Summary: Attractions in Alice Springs

- Visitors mainly used a motor vehicle (private or rented) to get to Alice Springs commercial attractions.
- Most common information sources were travel books, guides and brochures.
- No more than 5% found out about the commercial attractions through the internet.
- Visitors were generally satisfied with the commercial attractions in Alice Springs.
- Across most commercial attractions visitors were most satisfied with the friendliness and knowledge of staff.
Summary: Attractions in Alice Springs

- Alice Springs commercial attractions compare favourably to other attractions in Australia.

- Commercial attractions could be improved through:
  - Increased Indigenous involvement
  - Better car parking
  - Improved signage – including interpretative signage
  - Improved accessibility
  - Combining entrance fees to increase value for money
Recommendations
Recommendations

1. Stimulating consumer demand
   - Increase Indigenous involvement to strengthen region’s attractiveness as an iconic destination

2. Product development and diversification
   - Visitor expect a range of experiences -
     - Product development should consider expectations for these experiences and aim to reinforce the region as a unique destination
   - Adapting tourism products and experiences as consumer and travel behaviour continue to change
Recommendations

3. Improving product and service delivery

- Digital marketing and distribution
- Improved information services, roads and signage = improved visitor planning and increased dispersal
- Delivery of quality tourism experiences to encompass all factors of the visitor experience:
  - accessibility (including value for money)
  - supporting infrastructure, services and amenities
  - quality service delivery
  - embrace the natural and urban environment
  - encourage increased Indigenous involvement