



# Destination Visitor Survey Strategic Regional Research – South Australia

## The Impacts of Regional Visitor Information Centres on Visitor Behaviour in South Australia: Summary of Results

### Introduction

This study was undertaken by Tourism Research Australia (TRA) and the South Australian Tourism Commission (SATC) to examine the extent of the impacts of Visitor Information Centres (VICs) on tourist behaviour in regional areas of South Australia.

VICs play a central role in the distribution of tourism product<sup>1</sup> through the provision of information; the bundling of tourism products; and by providing mechanisms for consumers to make, confirm and pay for reservations.<sup>2</sup>

VICs contribute to tourism yield by increasing the number of activities that a visitor will engage in and by increasing the time that a consumer will stay at a destination.<sup>3</sup>

However, distribution of tourism and travel information has become fragmented in recent times with the increased usage of the internet and interactive web and mobile services. Independent travellers are now more likely to make decisions about their itineraries—including what they will see and do at a destination—as they travel.<sup>4</sup>

Although consumers access product online, they also seek confirmation and reassurance about the product. The opportunity to speak to knowledgeable and friendly locals is highly valued, and consequently, information derived from a visitor centre has been rated as more trustworthy, accurate and credible when compared to information derived from a web site.<sup>5</sup>

As part of its Regional Growth Plan, the SATC is assessing the value of regional VICs and has implemented a research program consisting of two phases: a benchmark survey conducted in April 2011; and a follow-up survey to be conducted in April 2012. The research is intended to assist with realising the potential of the VIC network and its value in increasing tourism yield in South Australia.

The key question to be addressed by the research is:

“Once visitors are professionally informed of local, regional or state-wide services, do they spend more, do more, and do they stay longer?”

This summary provides an overview of the key findings from the benchmark study.

<sup>1</sup> The tourism industry is predominantly services driven, however, the terminology ‘tourism product’ is commonly used to describe both the products and services offered by the industry.

<sup>2</sup> Buhalis and Laws, 2001. See definition of tourism distribution.

<sup>3</sup> Fesenmaier, Vogt and Stewart, 1993; Dreery, et. al., 2005.

<sup>4</sup> Ballantyne, et. al., 2009.

<sup>5</sup> Mistilis and D’Ambra, 2008.



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## Research methodology

The benchmark study consisted of a face-to-face survey of visitor centre patrons as they were leaving the VIC. The survey was conducted over the period 16–30 April 2011, at the following centres:

Visitor Information Centre	No. of interviews	No. of interviews
Gawler	452	162
McLaren Vale	682	175
Murray Bridge	346	96
<b>Total</b>	<b>1,480</b>	<b>433</b>

These visitor centres were selected on the basis that while they were situated in regional areas of South Australia, they were within reasonable proximity of Adelaide and provided a degree of variation with respect to their role, mix of services and other characteristics.

An online follow-up survey was conducted with those visitor centre patrons who had provided an email address and agreed to be contacted for this component of the research. Email addresses were also captured by the visitor centre staff in the two weeks prior to the face-to-face survey, and during periods when the interviewers were not working. The online survey was conducted from 1–15 May 2011, with a response rate of 45%.

Unless otherwise stated, the results presented below are derived from the face-to-face survey.

### Summary of Key Findings

#### *Who goes to VICs?*

- Overall, half of the VIC patrons were from interstate or overseas (39% and 11% respectively). Around one third (32%) were from Adelaide, 14% from the local region and 4% from elsewhere in South Australia.
- More than half of the interstate visitors (54%) were travelling with a partner or spouse (compared with 45% overall), while a higher proportion of those from overseas were travelling with friends (23% compared with 17% overall).
- A significant proportion of those surveyed at the McLaren Vale visitor centre (16%) were travelling with a commercial tour operator.
- Age group was evenly distributed with 28% aged 34 years or less, 36% aged 35 to 54 years and 35% aged 55 years or more.

#### *What did they request from the VICs?*

- Of those respondents who had spoken to VIC staff (85%), the great majority (71%) were asking for general tourism information on things to see and do. Others were interested in:
  - maps or directions (32%)
  - accommodation (7%)
  - day tours (4%)
  - other tourism product (17%).
- One quarter (25%) of respondents were interested in potentially bookable product – that is accommodation, day tour or other tourism product.
- The proportion asking about potentially bookable product was highest for respondents from interstate (29%) and overseas (35%).

#### *What was the value of bookings made through the VICs?*

- Of those respondents who had made an enquiry, 5% had booked product at the VIC. The value of the bookings was estimated as \$65 per adult person, on average.
- Product booked most frequently consisted of transport (other tourism product), which consisted mainly of bus tickets (41% of those booking), and accommodation (24% of those booking).
- When asked where the product booked was located, more than half (54%) stated that the product was located in the local area.

### *What information did the visitors pick up at the VICs?*

- Around nine in ten VIC patrons (88%) had sourced some information from the VICs, which included:
  - maps (80% of those taking some information)
  - regional guides (40%)
  - product brochures (33%)
  - a flyer for an event or other tourism product (31%)
  - a transport guide/timetable (4%)
  - a parks guide (3%).

### *What activities did the visitors participate in on the basis of this information?*

- When asked what activities they were planning on the basis of the information they had received, around half were visiting wineries (47% of those picking up information), while other activities included visiting an attraction (29%), a festival or event (9%), accommodation (8%) or river cruise (4%).
- The survey respondents anticipated spending \$202 per adult, on average, on the basis of the information received from the VIC.

### *What was the impact of the VICs in stimulating additional activities, nights and expenditure?*

- The respondents to the follow-up online survey were asked whether their visit to the VIC *had* or *would* result in them participating in additional activities, or spending additional time in the local area or elsewhere in South Australia that would not have otherwise occurred.<sup>6</sup> Responses were:
  - Over four in five (83%) had participated in additional activities
  - 72% had increased the duration of their stay
  - 22% spent additional nights in the local area (specified as Gawler, McLaren Vale or Murray Bridge)
  - 27% stayed overnight elsewhere in South Australia
  - visitors who extended their stay overnight, stayed on average an additional 2.9 nights in the local area and 6.1 nights elsewhere in SA
- Nearly six in ten visitors (59%) stated that the additional activities or time resulting from their visit to the VIC had also resulted in additional expenditure that they hadn't planned prior to visiting the VIC.
- While VIC patrons anticipated spending \$202 per adult on the basis of the information they received at the VIC, their actual unplanned expenditure equated to an additional \$181 per adult.

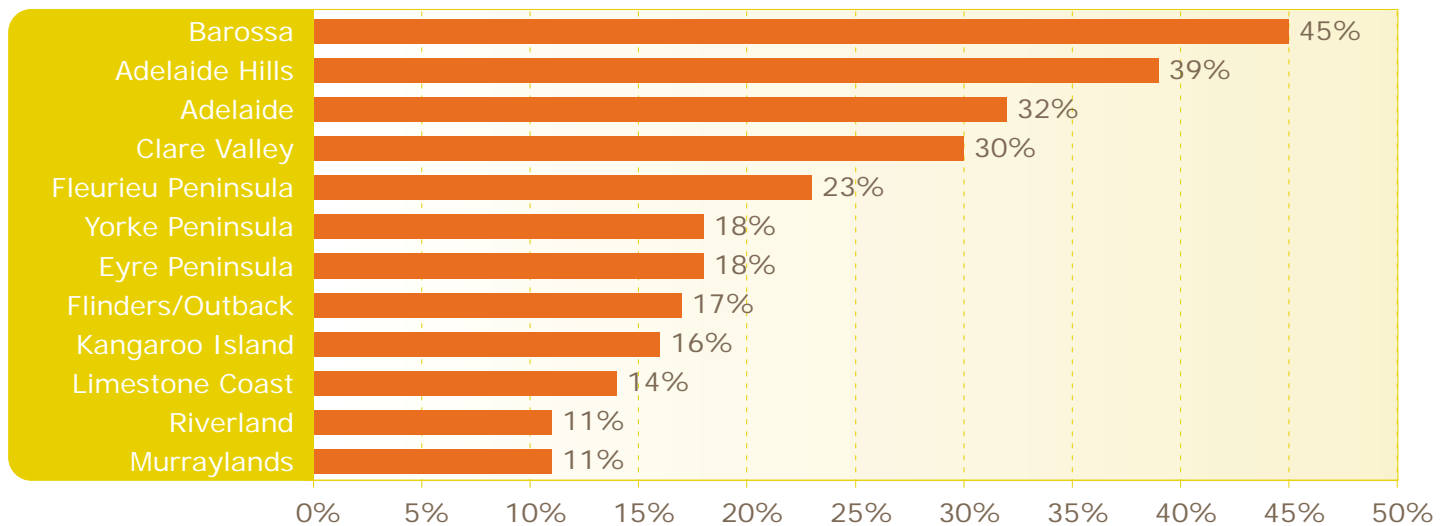
### *What was the impact of the VICs in distributing travel across South Australia?*

The online survey respondents were asked in which regions they had spent additional time as a result of attending the VIC.

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<sup>6</sup> At the time of completing the follow-up online survey, some respondents may still have been travelling, or planning future trips. As such, they were asked whether their visit to the VIC *had* or *would* result in them undertaking more activities or spending more time or expenditure in South Australia than they had otherwise planned. Responses to these questions can be interpreted as additional activity, time or expenditure spent in South Australia by visitors during their current/recent trip or during future planned trips.

**Figure 1 Region in which VIC patron spent additional time**



The survey results demonstrate the role of the VICs in influencing travel activity across South Australia. All of the tourism regions received visitors who had spent more time in the region as a result of the information received from the VICs.

*Use of touch screen information portals and attitude to portals*

The Gawler and McLaren Vale VICs contain touch screen information portals and the face-to-face survey respondents were asked whether they had used these facilities and, where used, to provide a rating of their performance. These questions related only to the use of the touch screen portals and not to the use of other technologies.

- Less than 10% of those interviewed at the Gawler and McLaren Vale VICs had used the portal.
- Almost all (97%) stated they would prefer to speak to a person rather than use a portal.

As previously discussed, VIC patrons valued the opportunity to speak to a knowledgeable local and this finding reinforces the importance of face-to-face interaction for many visitors. While portals were seen to offer an alternative for information dissemination, their low usage levels suggest they do not currently meet the needs of VIC patrons.

**Conclusions and recommendations**

Table 1 summarises the key impacts resulting from the activities of the Gawler, McLaren Vale and Murray Bridge VICs over the April school holiday period (16 April - 1 May 2011).

**Table 1 VIC impacts**

	VIC			Total
	Gawler	McLaren Vale	Murray Bridge	
Total attendance	1,660	2,370	1,510	5,540
Value of VIC bookings	\$5,200	\$4,300	\$5,900	\$15,400
Value of planned activity on basis of information received	\$219,900	\$359,700	\$317,400	\$897,100
Additional nights in local area	900	1,100	1,500	3,500
Additional nights elsewhere in SA	2,500	1,800	5,200	9,500
Total value of additional expenditure attributable to the VIC	\$161,500	\$260,000	\$176,300	\$597,800

Attendance at the McLaren Vale VIC was estimated from counter enquiries 1,880 extrapolated on basis of survey results.

The additional expenditure includes spending during the respondent's trip and also spending they were anticipating in the future, based on the information received.

## **Bookings**

On the basis of the survey results and attendance statistics, it was estimated that bookings made at the VICs over the reference period were worth \$15,400. Visitors initially anticipated spending an additional \$897,100 after receiving information from the VICs, however, results from the follow-up survey showed that VIC patrons actually spent an additional \$597,800 compared to their original trip plans.

While 5% of those making enquiries also made bookings through the VICs, one quarter (25%) were interested in potentially bookable product (accommodation, day tour or other tourism product). The difference between the value of VIC bookings and the additional amount spent by visitors after attending the VICs—as well as the difference between the proportion currently booking and the proportion interested in bookable product—provides an indication of the potential for further distribution through the VICs.

*Recommendation:* VICs should improve their product listings and booking infrastructure to make the most of direct-sales opportunities. Training staff in product knowledge and encouraging visitors to make bookings while at the VICs will help to achieve this.

## **Products**

The products most commonly booked at the VICs by the respondents were bus tickets and accommodation.

VICs are likely to be used to access information about things to see and do in a region and in this context, day tours and attractions are likely to represent the best opportunities for product sales, particularly where packaging can be offered. Accommodation will also represent an opportunity given the higher yield and the importance of endorsement by a knowledgeable local (if this can be offered).

*Recommendation:* Priority product for distribution should consist of day tours and attractions – particularly where a value-add can be provided by the VIC through packaging. Accommodation should also be a component of the product on offer provided direct booking and confirmation can be managed online.

## **Touch screen information portals**

The research included questions regarding the use of touch screen information portals and showed that in almost all instances, respondents would prefer to speak to a staff member rather than access information via a portal.

*Recommendation:* VICs need to recognise the importance of providing friendly, personal service to visitors. While a more sales orientated approach may yield benefits, consumers are seeking friendly, unbiased advice when they visit a VIC.

## **The contribution of VICs to their local area**

A significant proportion of bookings (54%) were for product located in the local area where the respondents were at the time – described as Gawler, McLaren Vale and Murray Bridge. The results provide an indication of the potential for the VICs to contribute to the tourism industry of their own local government area.

*Recommendation:* The research results should be used to demonstrate the value of VIC activities to local government and to point out the potential direct benefits of increasing the distribution activities of the VICs.

## **The role of VICs in tourism distribution across the state**

The research has demonstrated the extent to which the VICs stimulate visitors to spend additional time in regions and participate in extra activities across all regions of the state.

*Recommendation:* The research results should be used to demonstrate the benefits of the VIC network in distributing tourism and travel across the state as a whole. The VIC network should be supported from both a state tourism and national tourism perspective and individual VICs should recognise the need to provide information that extends across regional boundaries.

## **VICs and value-adding**

The results of the benchmark research suggest that VICs were responsible for 3,500 additional nights in the local area, 9,500 nights elsewhere in South Australia and additional expenditure of \$597,800 – i.e. activity that would not have occurred in the absence of the VICs.

VICs provide an opportunity to convert intention into behaviour. While visitors must *want* to visit a region prior to arrival, a VIC will add value by expanding the visitor's consideration set; by providing access to product, and by selling product.

The additional value provided by the VICs can be considered as the amount of visitor expenditure on tourism-related product that would not occur without the VICs. Some visitors may still spend more than they had originally planned, however, without the aid of the VICs this expenditure may occur in other sectors of the economy.

There are opportunities for further research in the future to provide a deeper understanding of the contribution of VICs to the tourism industry. The results reported in this summary represent the benchmark component of an on-going study with further data collection to be undertaken in April 2012. The second stage of the project will provide further evidence of the impact of VICs on travel behaviour and expenditure.

This summary is extracted from research conducted by Tourism Research Australia and the South Australian Tourism Commission, in partnership with Greenhill Research and Planning. For the full Strategic Research Report, please email [tourism.research@ret.gov.au](mailto:tourism.research@ret.gov.au).

## **References**

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Courtesy of McLaren Vale Visitor Information Centre



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