



Armidale Visitor Profile and Satisfaction Report: Summary of results

The following Visitor Profile and Satisfaction (VPS) report is based on a sample of 173 respondents who visited Armidale in New South Wales during July and August 2009.

For comparison purposes, some data are compared with benchmark data which includes all destinations completed within the VPS program. Comparisons against VPS benchmarks are made throughout this report and the 'Armidale fact sheet' (benchmark summary data) is available in conjunction with this report.

Additionally some data are compared with a 'subgroup' of destinations that have similar attributes to Armidale. The 'subgroup' includes:

- Toowoomba
- Orange

Unlike many regional destinations, Armidale has the benefit of some significant infrastructure that attracts visitors, namely, proximity to the New England Highway and the presence of the University of New England. Armidale's role as a regional centre is also important in attracting visitors. The influence of these factors means it is important to understand the profile of Armidale's visitors when considering the results of this VPS survey. For this reason, visitors to Armidale have been categorised according to their primary reason for visiting:

1. *Convenient stopover* (27%)
2. *Visiting friends and relatives – VFR* (22%)
3. *Business* (15%)
4. *Other reasons* - Armidale's attractions, education, medical, conference, sporting, etc (36%)

While the survey did not include the Tourism NSW Traveller Type classification, the profile of visitor demographics, average trip length and accommodation type suggests that the 'Wanderer'* segment is strongly represented amongst Armidale visitors, particularly amongst the *Convenient stopover*, *VFR* and *Other* groups.

A key point from the visitor profile is that there is a relatively small proportion of visitors (approximately half of *Other reasons*) whose main reason for visiting is to experience Armidale for what it offers as a tourism destination.

Armidale has a high *Overall satisfaction* ranking. Of the 62 destinations in the database, Armidale ranks as the 9th highest for visitors reporting that they were *very satisfied* with their visit to Armidale (57%).

*Tourism NSW define the Wanderer segment as: *marked older skew, adult couples, empty nesters, frequent tourists, DIY, great off-peak market, keen observers, widest range of preferences in transport mode, favour difference, continue their 'Darby & Joan' lifestyle when travelling, like to potter.*

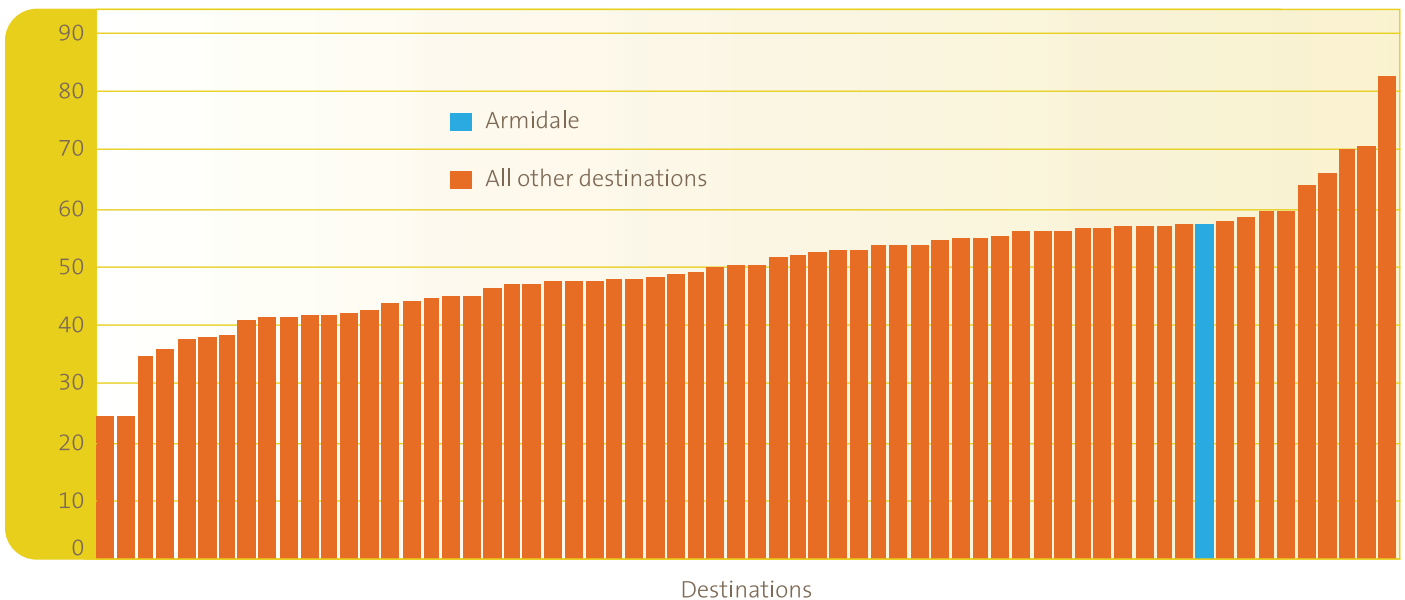


Australian Government

Department of Resources, Energy and Tourism

Tourism Research Australia

Overall satisfaction: Proportion of visitors very satisfied



Who scores Armidale so highly?

High levels of satisfaction are apparent for all the visitor groups except for *Business* visitors who, while still relatively satisfied, typically record lower satisfaction scores in all VPS projects. The particularly high satisfaction level is being driven by the older visitors regardless of which group they fall into. Interestingly, this includes the 'Wanderers'.

Why do they score Armidale so highly?

Armidale achieves higher than benchmark scores for the following attributes:

- *Information services in the region*
- *Shopping*
- *Value for money*
- *Commercial accommodation*
- *Tours*
- *Food and beverage*
- *Roads*

Other aspects that received relatively high satisfaction scores included *Personal safety and security* and *Local atmosphere*. However, it was the *Friendly, helpful and hospitable staff* and *Friendly locals* that visitors were most happy with.

There are some attributes which are highly related to a visitor's overall satisfaction, i.e. if a visitor is very satisfied with a particular attribute they are more likely to be very satisfied overall. In Armidale, this relationship is true across all visitor groups for *Friendliness of locals*, *Local atmosphere* and *Variety of things to see and do*. These attributes are clearly important in leaving visitors with a favourable impression and are actually key strengths of Armidale. Most of the attributes that Armidale performs very well on align well with the 'Wanderer' visitor segment.

Compared with other VPS destinations, relatively high proportions of visitors to Armidale don't do any research or make any bookings before arriving. Therefore, *information services* are particularly important for visitors to Armidale. The proportion of visitors *very satisfied* with this service in Armidale was one of the highest of all benchmark destinations.

In contrast, there were low levels of satisfaction for:

- Ratings of experiences in Armidale
- Likelihood of recommending Armidale to friends and family

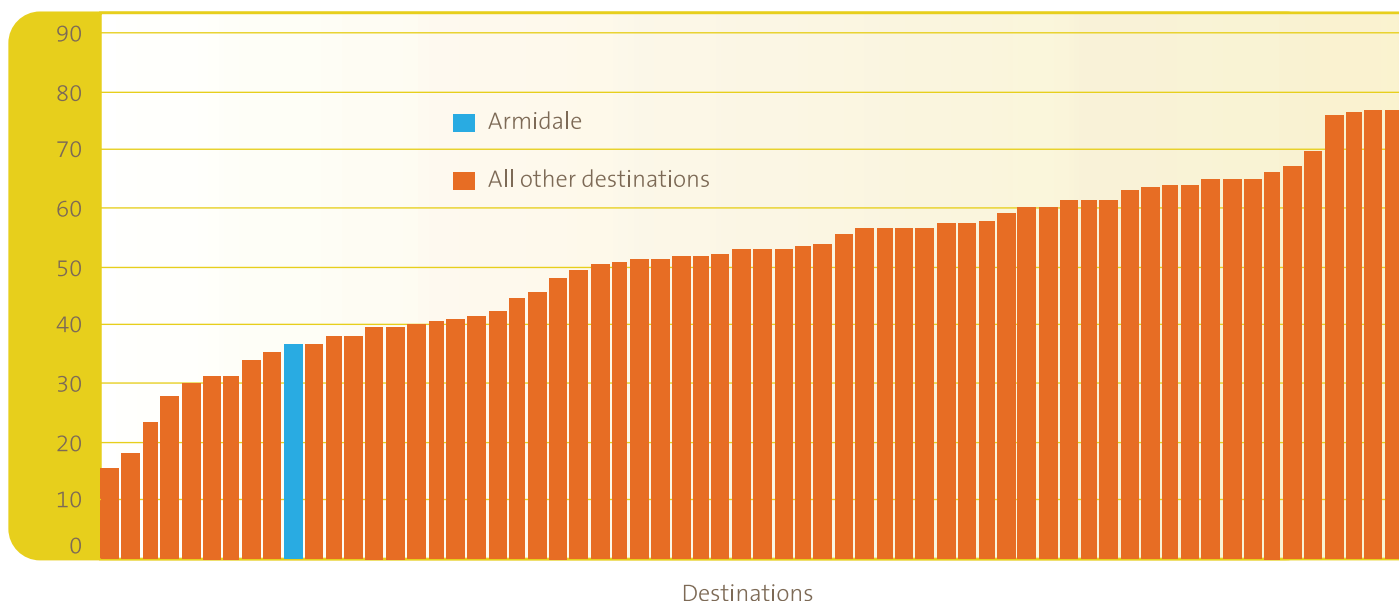
In terms of visitor experiences, the following scored around benchmark levels and demonstrate that Armidale does have a range of experiences upon which to build. Once again these experiences align well with the 'Wanderer' segment:

- *An adventure*
- *A chance to discover or learn something new*
- *Experience Australia's history*
- *Enjoyable nightlife and entertainment*
- *Food and wine experiences*
- *Nature based experiences*
- *An opportunity to tour around and explore*
- *An opportunity to experience arts and culture*

To some extent the lower experience scores are driven by the *Convenient stopover* visitors who participate less in these experiences. In fact, most activities are undertaken by the *VFR* group who do demonstrate higher levels of satisfaction with experiences, particularly the *Nature based* experiences. They also participate in more activities and visit more attractions than the other three groups.

Armidale received a particularly low score for *likelihood to recommend*, ranking 55th of the 62 destinations.

Recommendation: Proportion of visitors very likely to recommend



The contrast in these results is most likely due to a significant proportion of all visitors to Armidale leaving with a high regard for the town as a place to stop, but without having learnt about or having appreciated the experiences that Armidale offers.

How can this result be leveraged to assist Armidale's tourism industry?

If a major strategy for Armidale is to focus on the 'Wanderer' segment then the key, from a visitor perspective, would seem to be to shift attitudes towards Armidale from just one of the places to stop along the New England Highway to a place where you can stop for more than one night and participate in some of the experiences on offer.

There are several points that support this strategy:

- There is the opportunity to communicate to 'Wanderers' while they are in Armidale - a relatively cost effective opportunity.
- Word-of-mouth is an important information source for 'Wanderers'.
- 'Wanderers' are typically on long trips and have the flexibility to stop for a few nights.
- They are frequent travellers and therefore more likely to be returning (or at least travelling along the New England Highway again) than other groups.
- They like to potter.
- Armidale already has a number of experiences on offer, both nature-based and cultural/historical that fit well with 'Wanderers'.

Armidale performs exceptionally well on the more functional aspects of a visit such as *commercial accommodation, information services, food and beverage, value for money* etc and, as a result is well placed to entice visitors to return.

This summary is extracted from research conducted by Tourism Research Australia in partnership with Tourism New South Wales. For the full Visitor Profile and Satisfaction Report, please email tourism.research@ret.gov.au.

Tourism Research Australia
Department of Resources, Energy and Tourism
GPO Box 1564
Canberra ACT 2601

Email: tourism.research@ret.gov.au

Web: www.ret.gov.au/tra

ABN: 46 252 861 927

Image courtesy of Tourism New South Wales

Publication date: March 2010