



# Destination Visitor Survey Strategic Regional Research – South Australia

## South Australian Regional Visitor Guide Study: Summary of results

### Introduction

This study was undertaken by Tourism Research Australia (TRA) and the South Australia Tourism Commission (SATC) to quantify the impact South Australian Regional Visitor Guides have on holiday makers.

The SATC currently manages a large multi-media marketing campaign which includes the production and circulation of 11 high quality South Australian Regional Visitor Guides. These guides are distributed to consumers and the tourism trade.

Currently, the guides are used for two main purposes:

1. The industry trade uses the guides as motivational tools to entice new visitors to a region. They are handed out at travel and travel related consumer shows and mailed out to potential visitors.
2. Visitors use the guides as information sources for pre-trip and mid-trip decision making.

As the guides are a significant investment, SATC wants to ensure that the return from the guides is maximised. Therefore, the objectives of the project were to understand the role that the South Australian Regional Visitor Guides play:

- in motivating visitation. Where do the guides sit in the decision making process of prospective and actual visitors?
- as an information source both prior and during a visit. Do the guides influence length of stay, dispersal and expenditure?

### Research methodology

This research was conducted in 3 stages:

1. Desk research was conducted to specifically review the role of brochures (in general) as motivational tools by reviewing results and findings for a number of previous research studies.
2. Qualitative exploration involving seven focus groups in Adelaide, Sydney and Melbourne to understand the relevance and importance of guides/brochures in the holiday decision making process. This stage also included an ethnographic component, through observations and 60 field interviews conducted at the NSW Caravan and Camping Show.



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3. A quantitative survey with 1,183 Australian residents over 18 years of age who had holidayed in South Australia over the last two years. Sample quotas were applied to ensure a mix of interstate and intrastate visitors for analysis purposes.

As the primary objective of the research was to quantify the impact of the guides on holiday makers, comparison was required between holiday makers who used the South Australian Regional Visitor Guides on a recent trip to South Australia with those who did not. The survey sample included 709 guide users and 474 non-guide users.

### **Who uses the South Australian Regional Visitor Guides?**

- Guide users were more likely to be 50 years or more (45% of intrastate guide users and 60% of interstate guide users) compared with non-guide users (37% of intrastate guide users and 47% of interstate guide users).
- Guide users were more likely to travel with a partner (51% of intrastate guide users and 49% of interstate guide users) compared with non-guide users (38% of intrastate guide users and 41% of interstate guide users).
- Guide users stayed at a range of accommodation types, but were less likely to stay with friends and relatives than non-guide users.

### **Where did they obtain a South Australian Regional Visitor Guide?**

- The most common way of obtaining a South Australian Regional Visitor Guide was at a Visitor Information Centre – 38% of intrastate guide users and 42% of interstate guide users obtained guides from this source.
- Intrastate visitors were more likely to request a guide directly from SATC – 33% of intrastate guide users and 16% of interstate guide users obtained guides in this way.
- Fifty per cent of intrastate guide users collected only one guide, whereas 52% of interstate guide users collected three or more guides.
- Guide users often collected guides for a range of different regions including for regions they didn't visit. This emphasises the importance of Visitor Information Centres having guides available from different regions. It also suggests that for some visitors, the guides could help with deciding on which regions to visit on the trip or in the future and inspiring future trips to South Australia.

### **Where do the South Australian Regional Visitor Guides sit in the decision making process of prospective and actual visitors?**

The research suggests that guides in general do not inspire visits to a particular destination but do influence holiday planning and, more so, en route decisions.

- **Inspiration** on where to travel in Australia most often comes from word-of-mouth, newspapers, online deals and previous experience.
- **Planning:** Once a location is chosen, holiday makers predominantly research online for the best deals, accommodation and travel options and preliminary location information. However, the South Australian Regional Visitor Guides are used more so than other brochures and guides for researching and choosing accommodation.
- **En route:** Guides come into their own during the holiday. They are mainly used for maps, restaurants, local events, things to see and do and coupons. They compete with word-of-mouth, but in the future may compete with new technologies, such as iPhones and iPads.

In the case of the South Australian Regional Visitor Guides, they were an important holiday information source, with most guide users receiving or picking up a guide after making the decision to holiday in South Australia (Table 1).

- About 17% of intrastate guide users and 7% of interstate guide users received or picked up a guide at the consideration stage – most of these visitors were considering South Australia as their destination but hadn't made a firm decision yet.
- In contrast, 79% of intrastate guide users and 86% of interstate guide users received or picked up a guide once their holiday was confirmed – intrastate visitors were more likely to be in the active planning stage whereas interstate visitors were most often already on their trip.

**Table 1 The role of the guides in the decision making process**

Stage of holiday planning	Intrastate guide users (n = 390)	Interstate guide users (n = 319)
Consideration stage	17%	7%
Considering taking a domestic short break or holiday but hadn't decided where yet	29%	27%
Considering a short break or holiday in South Australia but hadn't made a firm decision yet	80%	77%
Holiday confirmed	79%	86%
Decided to go on a short break or holiday in South Australia but hadn't made any plans	20%	14%
Decided to go on a short break or holiday in South Australia and was already actively making plans	49%	42%
Already on a short break or holiday in South Australia	33%	49%
Picked one up on a previous trip	8%	12%

Note: Percentages don't add to 100% as some visitors picked up multiple guides.

### **What is the role of the South Australian Regional Visitor Guides as an information source?**

The role of the South Australian Regional Visitor Guides varied ranging from simply background reading through to suggestions of things to do. This was the case for both intrastate and interstate visitors. Most guide users agreed that the primary reasons for their use were:

- To look for things to do - 91% of intrastate guide users and 89% of interstate guide users agreed
- The maps - 89% of intrastate guide users and 92% of interstate guide users agreed
- Used for a bit of background reading - 85% of intrastate guide users and 89% of interstate guide users agreed
- Made my trip easier - 82% of intrastate guide users and 83% of interstate guide users agreed
- Increased the number of attractions they visited - 77% of intrastate guide users and 74% of interstate guide users agreed
- Used to look for places to eat - 70% of intrastate guide users and 65% of interstate guide users agreed.

### **Do the South Australian Regional Visitor Guides influence length of stay, dispersal and expenditure?**

As some of the primary reasons for using the guides were to look for things to do including increasing the number of attractions visited and looking for places to eat, it may be that this contributes to increase in length of stay, dispersal and expenditure for intrastate and interstate guide users.

A comparison in length of stay, dispersal and expenditure between guide and non-guide users is in Table 2:

- Although the trip length and number of locations stayed at by intrastate visitors was similar between guide and non-guide users, guide users spent more on their trip than non-guide users (Table 2).

- The expenditure per person per night of interstate guide and non-guide users was similar, however, interstate guide users stayed longer, stayed at more places and overall spent more on their holiday in South Australia than non-guide users.

**Table 2 Length of trip, dispersal and expenditure of guide and non-guide users**

	Intrastate		Interstate	
	Guide users (n = 390)	Non-guide users (n = 252)	Guide users (n = 319)	Non-guide users (n = 222)
Length of trip	Mean 3.9 nights	Mean 3.4 nights	Mean 8.7 nights	Mean 5.5 nights
	Median 3 nights	Median 3 nights	Median 6 nights	Median 5 nights
Number of locations stayed overnight	Mean 1.5	Mean 1.2	Mean 3.1	Mean 1.7
	Median 1	Median 1	Median 2	Median 1
Overall holiday expenditure <sup>a</sup>	\$843 - \$1,012	\$596 - \$741	\$1,876 - \$2,310	\$1,162 - \$1,414
Expenditure per person per night <sup>a</sup>	\$105 - \$126	\$81 - \$101	\$136 - \$160	\$130 - \$169

<sup>a</sup>. 95% confidence interval for the mean.

Although there appears to be a relationship between increased expenditure and guide usage, the results were not definitive as it is unclear if the guides encouraged visitors to spend more, or the guide users were pre-disposed to spend more anyway.

### How is new media impacting on South Australian Regional Visitor Guide usage?

New media may compete with the guides in the future, however, at the moment both are used.

- Seventy eight per cent of laptop users surveyed always/sometimes/occasionally take their laptop with them on holidays, with 26% always taking their laptop with them. Guide users were equally likely to use their laptop on a holiday as non-guide users.
- Laptops were being used for a range of purposes, ranging from: only using a laptop for work purposes (checking emails and the like), to uploading holiday snaps, screening DVDs for the kids, seeking local information on timetables and attractions or booking accommodation for the next location.
- Smart phone usage was high, particularly amongst the younger demographic, with 71% of 18-34 year olds owning one. Guide users surveyed were significantly more likely to own a smart phone than non-users – these information seekers will use all mediums to obtain information.
- Download costs, small screen size and network coverage are all barriers to using smart phones on holidays. Currently, there appears to be a lack of willingness to pay for iPhone applications, and those who would pay don't want to pay more than \$2 for an application.
- As iPad penetration increases, they have the potential to play a similar role to a guide during a trip. The iPad does not have the screen size restrictions of a smart phone and offers interactive benefits not available in a guide.

### Ideas to consider going forward

- Different styles of guides suit different people – some like large glossy comprehensive guides, while others prefer a fold out map with key regional information only.
- The one consistent criticism aimed at the South Australian Regional Visitor Guides was that they are possibly too big, supported by a preference for the Adelaide Guide format.
- While guides are generally not used to source accommodation, the South Australian Regional Visitor Guides do have a degree of influence on accommodation choice, particularly amongst those who request a guide pre-holiday – although the internet is the main tool used for sourcing accommodation.

- There is some suggestion that the Guides are not 'independent' enough – only tourism operators who advertise appear in the brochure. Travellers referred to internet sites such as tripadvisor.com as providing 'unbiased' information. To provide this independent look and feel, more traveller commentary/stories could be an option worth considering.
- Guide users were generally happy to use new information mediums. This indicates the potential for linking or migrating guides to new technology mediums (such as iPad applications) in a measured, gradual way.

This summary is extracted from research conducted by Tourism Research Australia and supported by the South Australian Tourism Commission. For the full Strategic Regional Research Report, please email [tourism.research@ret.gov.au](mailto: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](mailto:tourism.research@ret.gov.au)  
Web: [www.ret.gov.au/tra](http://www.ret.gov.au/tra)

ABN: 46 252 861 927

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