



Destination Visitor Survey

Strategic Regional Research - New South Wales

Greater Blue Mountains Natural Attractions Project: Summary of results

Introduction

This research was commissioned to assist the local tourism industry utilise the natural features of the Greater Blue Mountains to further promote the area and continue to improve tourism services in the region. The Greater Blue Mountains (referred to as Blue Mountains throughout this summary) was chosen for this study because of its natural beauty and inclusion in the National Landscapes initiative.

The research was conducted through an online community. The *Blue Mountains Community*, a private, branded and interactive online forum, was held from May through to July 2009. Visitors who had travelled to the Blue Mountains region for leisure purposes during the past two years were invited to join the online community. They were able to log into the website as many times as desired over the community's six week duration, to share their experiences and generate ideas about the Blue Mountains.

Whilst the majority of research was qualitative in nature (including discussions and online focus groups), quantitative measures were also taken throughout the life of the community (i.e. a profile survey, involving 337 participants; a nature survey, involving 68 participants; and a perceptions survey, involving 142 participants).

All quantitative data collected in the profile survey related to community members' most recent trip to the Blue Mountains.

Profile of visitors to the community

- In total, 337 visitors joined the *Blue Mountains Community* and the majority of these members were female (59%).
- Community members were represented evenly across three life stages; 18–34 years of age (34%), 35–49 years of age (31%), and over 50 years of age (35%).
- SINKs (single income earners, no kids; 20%) and DINKs (dual income earners, no kids; 22%) accounted for almost half of total members, with around one quarter (24%) being younger families (with children under 15 years of age) and almost one third (30%) adult families (with children 15 years of age or older).
- Of all community members, 80% had visited the Blue Mountains more than once, while 20% were first-time visitors to the region.

- The main purpose for visiting the region was for a *holiday or short break* (64%) followed by *visiting friends or relatives (VFR)* (17%) and *attending sports or special events* (7%).
- About one third of members chose the Blue Mountains to *experience nature* (34%), *because there were a variety of things to see and do* (33%) and *to visit specific attractions* (33%).
- Of all members, 45% travelled to the Blue Mountains for a day visit on their most recent trip, with one third (33%) staying one or two nights, and the remaining 22% staying longer than two nights. Overall the average length of stay was two nights.
- Around one third (36%) of community members were visitors from Sydney, with 17% being other intrastate NSW visitors, 25% interstate visitors and 22% international visitors.

What is the Blue Mountains brand and what sets it apart?

The Blue Mountains brand is most strongly associated with iconic, ‘big ticket items’ such as the Three Sisters, Echo Point and Jenolan Caves, with the township of Katoomba being considered the epicentre of the greater Blue Mountains region. When prompted, members’ awareness was strongest for The Three Sisters (92%), Katoomba (91%) and Jenolan Caves (85%).

Also of importance was the sense of community felt by visitors to the region. The warmth and friendliness of the locals were consistently reported as a unique feature of the Blue Mountains.

Secondary strengths of the Blue Mountains brand were considered to be its cultural (e.g. galleries, museums, art, antiques and festivals) and historical aspects (e.g. Sir Henry Parkes’ grave, Prime Ministers’ Avenue of Oaks). These secondary attractions were appreciated most by Sydney-based repeat visitors, with many intrastate and interstate visitors having limited awareness of these cultural and historical offers.

For some, the Blue Mountains was associated with a mix of built and natural environments and shorter holidays. Its marriage of the beauty of the natural environment and the comfort of the built environment was considered the Blue Mountains’ true point of difference from other holiday destinations (e.g. Kakadu National Park and the Great Barrier Reef). National parks were not automatically associated with the Blue Mountains.

What motivates visitors to go and where does nature fit?

Four core needs were identified as motivations for visiting the Blue Mountains region. These were:

- Pamper (feel like being indulgent) e.g. *‘A mum’s retreat...getaway’*
- Rejuvenate (feel burnt out) e.g. *‘Fed up with the hustle and bustle of city life’*
- Discover/showcase (feel like discovering) e.g. *‘Wanted to show the kids...visitors’*
- Physical exploration (feel like exploring) e.g. *‘An outdoor adventure holiday with my friends’*.

How actively nature is experienced depends upon these four core needs:

Need and the role of nature

Need	Role of nature in decision to visit	Nature provides	Nature experience
Pamper	Secondary	Backdrop	More passive
Rejuvenate	Facilitator	Ability to relax	More passive
Discover & showcase	Primary	Activity/education	More active
Physical exploration	Primary	Activity	More active

For most visitors, their experience of nature was more passive (91%) and active (78%) than extremely active (4%). Results from the profile survey showed nature was experienced in the following three ways:

Nature experience

Passive (91%)	Active (78%)	Extreme activity (4%)
<ul style="list-style-type: none"> • Drove and took in views (82%) • Visited main attractions (74%) • Visitors centre (46%) • Visited botanical gardens (38%) • Picnic/BBQ in local/national park (38%) 	<ul style="list-style-type: none"> • Short bushwalk (2 hrs) (69%) • Half day bushwalk (21%) • Camping (9%) • Swimming (6%) • Cycling (2%) • 4WD (9%) 	<ul style="list-style-type: none"> • Abseiling (2%) • Rock climbing (2%) • Canyoning (2%) • Mountain bike riding (2%) • Full day bush walk (2%) • Full day bush walk & camped (2%)

Base: Nature survey, N=68. For classification into the above groups, members must have participated in at least one of the listed activities.

What do visitors do and use in the Blue Mountains?

What visitors did while in the Blue Mountains was largely reflective of general awareness levels. The iconic Blue Mountains 'big ticket items' were frequently visited by more community members, than were historical and cultural features, which were visited by a small proportion of community members.

In summary, of all visitors who joined the *Blue Mountains Community*:

- The majority (71%) walked or drove around/took in the sights/general sightseeing, and visited Katoomba (58%) and the Three Sisters (55%).
- Around 43% went on bush walking/rainforest walks.
- Almost one third (31%) visited history/heritage buildings, sites or monuments.
- One quarter (25%) went to the markets.
- One in five (20%) visited botanical/public gardens.
- More than one in ten (13%) visited museums or art galleries.
- Less than one in ten (9%) visited a winery/cellar door.

Other activities experienced included *eating out at hotels/restaurants/clubs/cafes* (60%), shopping (32%), *picnic/BBQ* (24%) and *visiting friends/relatives* (21%).

Overall, overnight visitors experienced more of the cultural and historical Blue Mountains offerings than day visitors.

Participation in activities

Activity	Total visitors (337 members)	Day visitors (153 members)	Overnight visitors (184 members)
• Walk/drive around/take in the sights/general sightseeing	71%	66%	75%
• Bushwalking/rainforest walk	43%	29%	54%
• Visited history/heritage buildings, sites or monuments	31%	21%	40%
• Go to the markets	25%	13%	34%
• Visited botanical/public gardens	20%	16%	23%
• Visited museums or art galleries	13%	7%	19%
• Visited winery/cellar door	9%	2%	15%

Summary

- The majority of community members were repeat visitors to the Blue Mountains visiting for a holiday or short break.
- A large proportion were from Sydney and visited the Blue Mountains on a day trip. The close proximity of Sydney to the Blue Mountains poses challenges for converting day visitors from this market to overnight visitors.
- There was limited awareness of history and cultural activities or events available in the Blue Mountains region, outside of iconic 'big ticket' items (e.g. The Three Sisters). History and cultural activities and events were more likely to be undertaken by overnight visitors than day visitors.

For a copy of the full Strategic Regional Research report, please email tra@tourism.australia.com

Tourism Research Australia
Level 3, 11-17 Swanson Plaza, Belconnen ACT 2617
PO Box 1110, Belconnen ACT 2616

Telephone: + 61 2 6228 6100
Facsimile: + 61 2 6228 6180
Email: tra@tourism.australia.com

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ABN 99 657 548 712

www.tra.australia.com

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