



Destination Visitor Survey

Strategic Regional Research - South Australia

Exploring reactions to the Nullarbor as a tourism destination: Summary of results

Introduction

This research was commissioned to assist in the development of strategies to increase tourism numbers and spend in the Nullarbor Plains region, and at the same time, measure the appeal of certain experiences. The initial focus for the study area was the Nullarbor Plain west of Ceduna to the SA/WA Border (far western coastal section of the Eyre Peninsula region); with the study extended to take in the western coast line of the Eyre Peninsula in stages 2 and 3.

The research was conducted in three stages:

- Stage 1 and 2 - qualitative research conducted in August and October 2008
 - 4 group discussions were held for each stage
- Stage 3 - quantitative research conducted in December 2008
 - online survey of target market
 - total sample - 854 participants

This document contains a brief summary from stages 1 and 2, but focuses mainly on the key findings and recommendations from stage 3.

Stages 1 and 2 - Key findings

The first stage of the qualitative research revealed that knowledge of the Nullarbor & Far West South Australian coast was low, even among those in Adelaide. Consequently, it was not a region most people would consider visiting. Additionally, the majority of participants only managed an 'educated guess' as to what the region might offer in terms of experiences.

Outside of awareness, the main barrier to visiting the region was time, as there was a perception it would take a long time to get there, and that you would need more than seven days to visit the whole region. Other key barriers to visiting the region included: cost (petrol in particular); safety concerns; access to a reliable vehicle; and concerns regarding weather extremes.

Five unique experiences were presented to participants in stage 2 (whale watching & Bunda Cliffs, Indigenous, fishing, caving and wildlife). While there was considerable interest in wildlife (particularly swimming with sea lions) and caving as they were considered unique experiences, there was less interest in fishing and Indigenous experiences; these were questioned in terms of their uniqueness.

With regard to whale watching and Bunda Cliffs, there was generally a positive response as they were regarded as very spectacular, but whether this was enough to warrant travelling so far was questioned, especially since there was a real possibility of not seeing any whales at all once at the destination. It was the combination of experiences that would create a more compelling reason to visit the region.

The presentation of a 7 day self-drive itinerary from Adelaide changed participants’ perceptions considerably from a rather abstract concept, to an understanding of what a holiday in the Nullarbor region could entail. The main concern for participants was the average 350km+ drive *each* day.

- Most people felt they would either take more than 7 days to ensure they weren’t rushed, or pick the 2-3 experiences that really interested them and do the trip in 5 days.
- Overall, there was a stronger preference among most participants for a ‘pick and mix’ type approach to planning a holiday in the region. This gave more flexibility and ownership of their holiday. The information required to create such a holiday needs to be on the radar of potential visitors.

Stage 3 - Key findings

The main objectives of stage 3 were:

- To measure existing knowledge of tourism experiences available across the Nullarbor and Far West South Australian coast regions.
- To determine the appeal of current and potential tourism experiences in the region, and identify barriers to visitation and areas for optimisation.
- To provide direction as to how these current and potential tourism experiences could best be packaged and promoted to potential visitors.

Qualification criteria for participants

Criteria	Total sample – 854 participants	Preferrers ^a – 558 participants	Preferrers + propensity to take driving holidays – 429 participants
18 years or over	•	•	•
Main/joint travel planner for household	•	•	•
Had travelled o’seas, inter or intrastate for leisure in past 12 months, or intended to in next 2 years	•	•	•
Had travelled o’seas or interstate for leisure in past 12 months, and intended to also travel o’seas/interstate in next 2 years.		•	•
Likely to take driving holiday in next 12 months (incl. overnight stay at more than 1 location)			•

^a The ‘Preferrer’ segment is Tourism Australia’s broader definition of the ‘Australian Experience Seeker’. It excludes a constraint on expenditure. This was the target market for this research.

Profile of participants

- Overall, 54% of participants were female, and 46% were male.
- About 30% of participants were aged 30 to 44 years, 29% were aged 60 years and over, 28% were 45 to 59 years, and 12% were 18 to 29 years.
- One third of all participants were families, 30% were older non-working singles/couples, and 15% were older working singles/couples. The remainder were young/midlife couples with no kids (12%), and young/midlife singles with no kids (10%).

- Of all participants, 36% were from New South Wales & the Australian Capital Territory, 27% were from Victoria & Tasmania, 21% were from South Australia, Western Australia & the Northern Territory, and 17% were from Queensland.
- Half of all participants were all or mainly responsible for travel planning within their household, and half were jointly responsible.
- Preferrers were significantly less likely to be families, but more likely to be young/midlife couples with no kids than the total.
- Older working singles/couples were more likely to take a driving holiday.

Awareness of the Nullarbor region

- Knowledge of the Nullarbor & Far West South Australian coast region was very low, although marginally stronger among the target sub-groups, Preferrers, and Preferrers + driving holidays.
- Of all participants, 62% had little knowledge of the region, while 22% had no knowledge at all. Knowledge was marginally stronger among the target group (59% and 19% respectively).
- Around 1 in 6 people recalled seeing, reading or hearing about tourism experiences in the region, with recall marginally higher among the target groups (1 in 5 recalled at least one experience).
- Only half of those that indicated they had seen, read or heard about experiences in the region could recall something specific.
- Around 10% of participants mistakenly recalled experiences/places that relate to other regions, with Western Australia the most prominent, but there were also mentions of the Great Ocean Road/Twelve Apostles and Uluru.
- TV (76%), word-of-mouth (37%) and previous experience (31%) were the most common sources of information about the region.
- Target groups were more likely to recall seeing, reading or hearing about the region via print media and the internet.
- While whale watching, fishing, sightseeing, scenery and tours were expected experiences, 25% of participants could not think of any experiences that might be available in the region.

Previous experience of the region

- Just under one quarter of participants had previously crossed the Nullarbor.
- Participants who had made the trip were more likely to be male, older, retired, have no kids in their household and live in South Australia, Western Australia or the Northern Territory.
- 'Holiday' was the main purpose of the trip for 3 in 5 participants who had made the crossing, while 1 in 5 travelled to 'Visit friends and relatives' (VFR), and the remainder travelled for 'Business' and 'Other'. ('Other' purpose of visit mainly related to people moving house between States.)
- On average, participants made their Nullarbor crossing trip 12 years ago, with almost 3 in 5 making their trip more than 10 years ago. Only 5% made the trip in the past 12 months.
- Most described their Nullarbor trip as positive, with only 5% indicating the experience was 'quite negative'. Neutral and negative responses tended to be related to trips with a VFR or 'Other' (i.e. functional) purpose, rather than a 'Holiday' purpose.
- Most participants who had crossed the Nullarbor (70%) stopped to engage in leisure activities, with 41% stopping for at least one night.
- After overnight stops, stops of less than 2 hours were most common (16%), allowing people to have a break and engage in the area without substantially delaying their trip. Thirty per cent did not stop at all during their trip.

Interest in the region

Prior to exposure to the tourism experiences, interest in taking a trip to the Nullarbor region was weak compared to other competitive domestic offers, such as a trip to the Great Ocean Road; a stay at a 5-star resort in Far North Queensland; a gourmet food tour in Tasmania; and a trip through the Red Centre.

While the target sub-groups showed more interest in a trip to the Nullarbor, they also showed increased interest in other iconic Australian driving holidays, such as a trip to the Great Ocean Road or the Red Centre.

Weak appeal overall was not surprising given low awareness levels. The strongest potential appears to be among the target group, Preferrers, who take driving holidays and don't have young children.

Reaction to tourism experiences

Building on the tourism experiences presented in the qualitative stage, six experiences were presented to participants. These included: whale watching at the Head of Bight; swimming with sea lions and dolphins at Baird Bay; other wildlife experiences (e.g. great white shark cage dive); caving at Koonalda Cave; Aboriginal experience at the Head of Bight; and fishing at Fowlers Bay.

Reactions to the tourism experiences varied:

- whale watching and sea lions were the most broadly appealing concepts with strong interest overall
- the wildlife and caving experiences were less popular with weak to moderate appeal overall
- the Aboriginal and fishing experiences were met with ambivalence and a polarised response respectively, with weak overall interest.

Interest in the experiences was higher among the target groups, Preferrers and Preferrers + driving holiday, but not significantly so.

Exposure to the experience concepts had a very positive impact with two thirds of participants indicating that reading about the experiences had increased their interest in visiting the region.

Packaging the experiences

Interest in a 7 day sample itinerary was fairly weak overall, appealing mostly to:

- females
- those under 60 years old
- people who are part of a couple
- those with children under 15 years old.

While the itinerary was thought to include a good variety of exciting and interesting experiences in a well-organised structure, it was somewhat overwhelming for some:

- There was concern that the itinerary was too tightly structured, and perhaps too organised, with some preferring to create their own, more relaxed and tailored itinerary.
- A number of participants were apprehensive about the amount of driving required, with long distances covered almost every day – this was an issue especially when other experiences were included on the same day as long drives.
- Overall, a 7 day option presented to participants was preferred over a 5 day alternative.

On the whole, 61% indicated a strong preference to design their own itineraries, and undertake less structured drive or fly/drive holidays:

- The target groups, Preferrers and Preferrers + driving holiday favoured this type of holiday (70% and 80% respectively).
- Despite this, structured, pre-packaged, self-drive tours were still preferred by 13% of participants, with 12% preferring an accompanied coach or 4WD tour.

Summary

- Awareness is the number 1 barrier to increasing visitation to the region. Knowledge of what's on offer in the region was very low and it was therefore not surprising that people felt ambivalent about visiting.
- Where people did know something about the region, it was generally quite vague, but positive.
- Those that had past experience in the region were very positive. While many travelled to the region some time ago, the majority remembered their trip as enjoyable and unique.
- As seen in the qualitative research, interest in visiting the region was quite weak overall but stronger among those with no young children in their household.
- The tourism experiences worked together to significantly increase interest in visiting the region. A combination of several experiences assisted to overcome barriers such as distance - while it may not be worth travelling a long way for one experience, two or three might make it worthwhile.
- While the region as a whole appealed more to a slightly older Preferrer market, many of the experiences appealed most strongly to a slightly younger, more family-orientated market.
- Although some of the experiences were unique (sea lions), most were experiences which were also available in other regions of Australia. Unique experiences are key to overcoming barriers to visitation.
- The sample 7 day itinerary produced weak interest overall. However, collating the experiences on offer in the region into sample itineraries was important in making a holiday to the region more tangible to potential visitors.

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