



# Queensland's Outback Central West Visitor Profile and Satisfaction Report: Summary and Discussion of Results

## Introduction

The Queensland's Outback Central West (QOCW) Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (TRA), within the Department of Resources, Energy and Tourism. The results from VPS studies are useful at all levels of destination management including planning, development and marketing.

This project was undertaken by TRA in partnership with Tourism Queensland to gain a better understanding of visitors to the region and improve the market readiness of the industry within the QOCW region. Additionally, this research will provide more reliable and detailed information on the region, to feed directly into industry development decisions and investment initiatives. More specific objectives of the research included understanding issues such as quality of tourism product and experiences, motivations and expectations of visitors, travel planning habits, Indigenous experiences, and the use of commercial and free caravan or camping facilities.

The results for QOCW were positive but showed that there were issues that should be addressed. The study showed that many visitors lacked enough knowledge of the region to take full advantage of what was on offer. While many visitors were aware of the major man-made attractions in the region, they had not allowed enough time to experience what the region offered.

## Method

This VPS project comprised two phases:

1. The first phase was the quantitative VPS survey which aimed to provide information on the profile and satisfaction of visitors to the region. A total of 474 visitors were recruited for the survey during their visit to the region in September and October 2010.
2. The second phase comprised a series of qualitative interviews with respondents from the initial VPS survey to expand on the initial findings. These interviews were conducted in November 2010 and involved six focus groups with visitors from Melbourne, Brisbane, Sunshine Coast, Sydney and Geelong, and ten in-depth telephone interviews with visitors from regional areas of Queensland, New South Wales and Victoria.

This document is a summary of the results and insights from both project phases. All results discussed are from the quantitative survey phase unless specifically noted as qualitative phase results. The detailed reports from each phase are available from TRA upon request.

Since 2006, 69 VPS projects have been completed in Australian regional tourist destinations. Data from these projects have been collated to establish the VPS Benchmark Database.



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Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents. Some destinations are surveyed during different times of the year in order to encompass the broadest range of visitors. In this event, only the most recent research for the destination is included. Comparisons against VPS benchmarks are made throughout this summary.

## Visitor and trip characteristics

The demographic visitor profile for QOCW mirrors that of many Australian outback tourism regions, with a key exception being NT outback regions which attract a significant proportion of international visitors. Outback regions are also interesting because they attract visitors with similar profiles, unlike many other destinations in Australia which have much more diversity in their visitor profiles. The results of the QOCW VPS showed:

- Visitation was dominated by older travellers — about eight in ten visitors were aged over 54 years
- Most of the older visitors were retired, with two thirds of visitors in the older non-working life stage — this was a much higher proportion than the VPS benchmark
- Just over half the visitors reported annual household incomes of less than \$52,000 which is a considerably higher proportion than the VPS benchmark
- Nearly seven in ten visitors travelled as a couple — also a much higher proportion than the VPS benchmark
- About six in ten visitors were from interstate — in QOCW, these visitors were mainly from Victoria and New South Wales and most of those were from regional areas
- About nine in ten visitors were on trips of more than seven nights (the median trip length was 35 nights) and most spent at least four nights in QOCW (median was six nights)
- Half the visitors were first-time visitors to the region — a considerably higher proportion than the VPS benchmark
- Nearly nine in ten visitors were self-drive visitors to the region.

The profile confirmed that the majority of visitors to the region were older Australians on long haul self-drive trips. However, the qualitative research found that travellers do vary in how they perceived the region and in their level of experience with it.

An interesting distinction made between visitors in the qualitative phase was based on visitors' level of experience with the region and, in particular, a segment of visitors who were relatively inexperienced with the region. This segment had limited expectations and a limited understanding of how QOCW differs to other Australian outback regions. As a result, they largely perceived the region as a thoroughfare or stop-off point on a longer journey to somewhere else. However, once they actually visited QOCW, many discovered its unique qualities and realised it had a lot more to offer as a destination than they had initially thought.

Another way of understanding visitors to Queensland is through Tourism Queensland's domestic market segmentation which divides the domestic market into six segments based on visitor's needs and wants. Each respondent to the quantitative survey was required to choose the segment which they felt best represented them:

- Connectors — choose holidays where they can bond with family and friends
- Self discoverers — choose holidays where they can enrich their mind and nourish their body
- Unwinders — choose holidays where they can reflect and recharge at their own pace
- Active explorers — choose holidays where they can be challenged and feel alive
- Stylish travellers — choose holidays where they can stand out from the crowd, and appreciate and enjoy the finer things in life
- Social fun-seekers — choose holidays where they can share good times with friends, new and old.

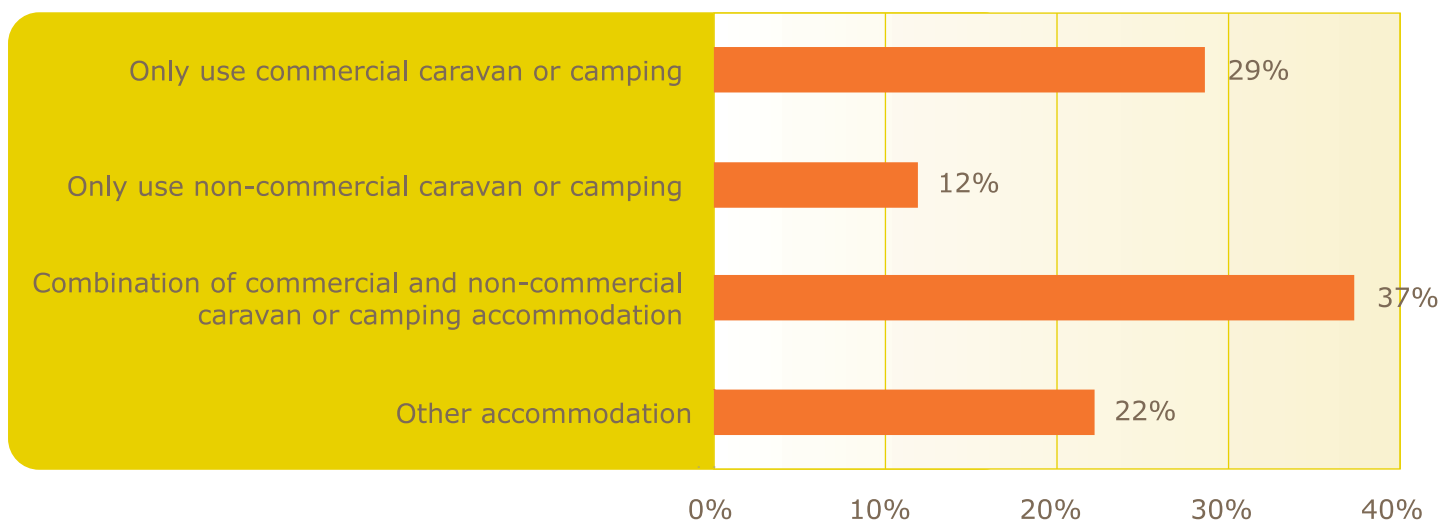
Just over six in ten visitors classified themselves as *Connectors*. A holiday to a *Connector* is all about re-connecting with family and friends through relaxing, unwinding and having fun<sup>1</sup>. Almost two thirds of the *Connectors* in the survey were from interstate, highlighting the importance of this segment in both the interstate and intrastate markets for QOCW. The proportion of *Connectors* was also similar for interstate visitors irrespective of which state they came from. The next most common segments were *Self discoverers* (13%) and *Unwinders* (12%).

<sup>1</sup> See Tourism Research Australia 2010, *Understanding the Connector Market*, TRA, Canberra for more information on the Connector market.

## Caravan or camping visitors

As expected, the majority of visitors to the region were self-drive, and three quarters of these were travelling with a caravan or motor home, or were equipped with camping gear. Consequently, the various forms of caravan parks and camping grounds were the most common type of accommodation used in QOCW (just over seven in ten visitors). The chart below shows that the largest proportion of caravan or camping visitors used a combination of both commercial and non-commercial sites. Those who used non-commercial sites exclusively were the smallest proportion.

### Accommodation used by caravan or camping visitors in QOCW



Analysis of the expenditure of the various caravan or camping groups (see table below) showed that the highest expenditure per night and total trip expenditure was by visitors who *used a combination of commercial and non-commercial sites*. Furthermore, although visitors who *only used non-commercial sites* spent less per night than other visitors they tended to spend longer in the region, so their total expenditure while in QOCW was comparable to the other caravan or camping groups.

### Average expenditure of caravan or camping visitors in QOCW

	Average expenditure per night	Average expenditure per trip
<i>Used a combination of commercial and non-commercial sites</i>	\$90	\$560
<i>Only used commercial sites</i>	\$80	\$425
<i>Only used non-commercial sites</i>	\$60	\$415

Key motivations for using non-commercial sites have more to do with the experience and itinerary considerations than saving money; a possible explanation for the comparable total trip expenditure by visitors who *only used non-commercial sites* to the other caravan or camping groups. The quantitative results showed there were a large number of experiences expected and attributes that were important to visitors who *only used non-commercial sites* compared with other visitors to the region. Of the 20 experiences listed, 13 were expected by these visitors and of the 21 attributes, 13 were very important to these visitors — both larger numbers than for other visitors.

- Experiences expected ranged from natural and cultural attractions and events to meeting the locals and escaping the crowds.
- Attributes that were important ranged from functional aspects like availability of free camping, waste dumping facilities, toilets and information services through to the local atmosphere.

The qualitative results also support these findings. In the interviews, visitors cited a range of reasons for and against staying in commercial or non-commercial sites. The facilities, entertainment and social interaction were all seen as positive aspects to staying in commercial sites; while a lack of privacy, noise and expense were seen as potential drawbacks. Privacy, and the ability to have a 'real' outback experience (complete with camp fires, star gazing and isolation or quietness), were the

perceived positives to staying in non-commercial sites; while a lack of facilities, safety issues and a lack of policing of free sites emerged as the negatives.

## **Motivations and satisfaction with QOCW**

QOCW offers a large number of man-made and natural attractions including cultural and heritage attractions, outback pubs, dinosaurs/fossils and National Parks. One quarter of visitors in the quantitative survey stated that the most important reason they chose to go to QOCW was to visit one or more specific attractions, with the next most important reason being that it was a convenient stopover point (11%). Positively, satisfaction with the region's attractions scored well above the VPS benchmark; almost two thirds of respondents said they were very satisfied with the attractions. Open ended comments also reflected this with many respondents commenting on the excellent value of the attractions.

The importance of attractions to the region's identity was further demonstrated by the experiences that visitors expected to have in the region. The most commonly expected experiences included *experiencing our nation's/Australia's history* (89%) and *discovering or learning something new* (84%); each well above VPS benchmarks in terms of the proportion of visitors expecting them (53% and 60% respectively). Both these experiences were rated very highly for being better than expected (69% and 68% respectively) and were again well above VPS benchmarks (48% and 49% respectively).

Indigenous experiences are often associated with outback Australia, although both the quantitative and qualitative phases revealed this was not the case for QOCW, as only 23% of the visitors surveyed expected this experience.

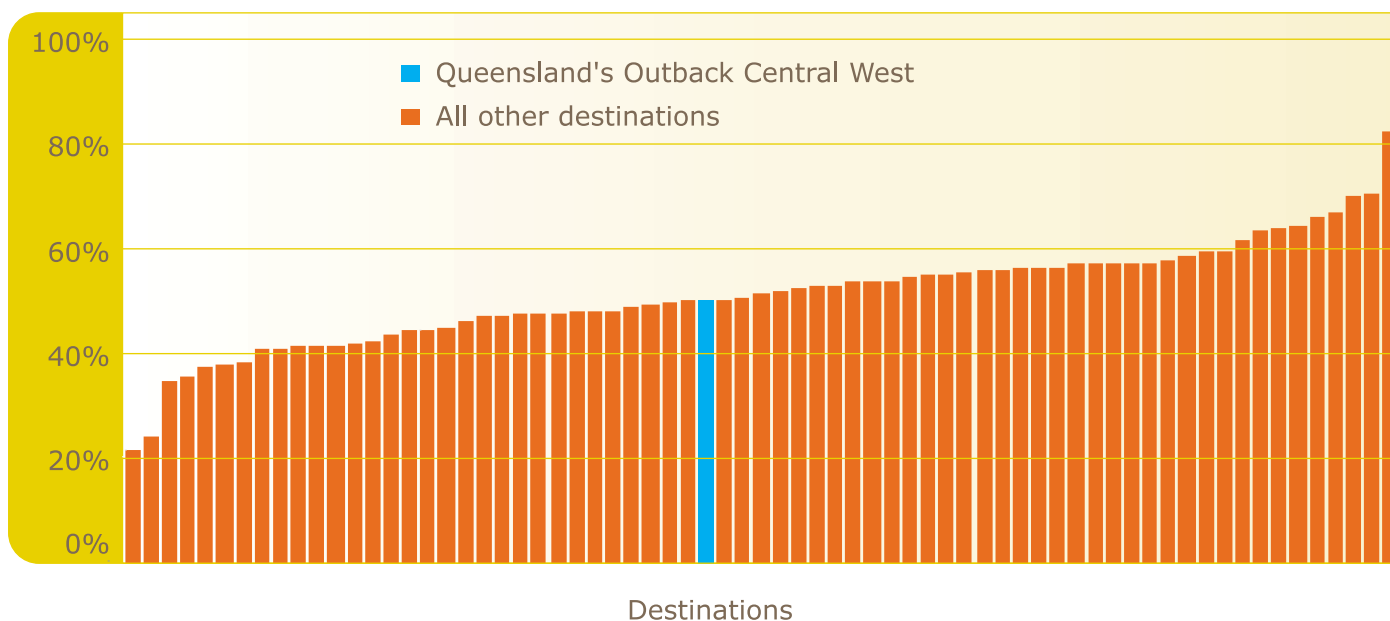
There were a number of other experiences and functional aspects of the region that scored well above VPS benchmarks in terms of exceeding expectations and satisfaction:

- Tour around and explore (exceeded expectations for 55% compared with a benchmark of 51%)
- An adventure (51% compared with 47%)
- Personal safety and security (68% were very satisfied compared with a benchmark of 56%)
- Friendliness of the locals (67% compared with 55%)
- Friendly service (62% compared with 56%)
- Local atmosphere (61% compared with 53%)
- Variety of things to see and do (61% compared with 50%)
- Information services in the region (59% compared with 48%)
- Public toilets (42% compared with 38%).

In addition, QOCW scored above the VPS benchmarks for visitors being very likely to recommend the region to others. A couple of other themes with a high degree of satisfaction were evident from the open ended comments of visitors in the quantitative survey. A large number of visitors mentioned how pleased they were with the entertainment/information provided by caravan parks — the extra effort being made by park operators seemed to be appreciated and left a lasting and positive impression on many customers. Another frequently mentioned area of satisfaction was with the towns themselves — this was mostly expressed as the pride that locals have in their towns, the cleanliness of the towns and the history evident in them.

In terms of overall satisfaction, 50% of visitors stated that they were very satisfied overall with their visit to QOCW; one percentage point below the VPS benchmark of 51%. The chart below shows the QOCW ranking against all other VPS destinations.

## Overall satisfaction: Proportion of visitors very satisfied



### Barriers and areas for improvement

Given the list of experiences and functional aspects that scored above VPS benchmarks, it was surprising that the overall satisfaction with the region was not higher.

However, the quantitative survey highlighted some areas of lower satisfaction, such as roads (29% very satisfied) which scored below the VPS benchmark (40%). This was also an attribute that was very important (40%) to visitors relative to the VPS benchmark (23%). Open ended responses indicated that although visitors were happy with the quality of the roads, there were issues around the presence of road kill and safety concerns in relation to dealing with road trains, especially on narrow roads. QOCW recorded lower satisfaction scores with roads than most other outback destinations in the VPS database. Satisfaction with food and beverage (38%) and shopping (25%) also scored below the VPS benchmarks (44% and 30% respectively).

There were three experiences that were expected by the majority of visitors but scored on or below VPS benchmarks in terms of exceeding expectations. Although the scores were only slightly below the VPS benchmarks they were all experiences which were specific needs of *Connectors*:

- Relaxation and rejuvenation (expected by 77%; exceeded expectations of 44% which is just below the VPS benchmark)
- Nature based experiences (expected by 75%; exceeded expectations of 48% which is just below the VPS benchmark)
- A place to spend quality time with partner/family/friends (expected by 59%; exceeded expectations of 46% which is well below the VPS benchmark).

However, the slightly negative feedback on these aspects from visitors may not be significant enough to explain the average overall satisfaction score. The qualitative phase put forward some broader reasoning for this result that was supported by the quantitative results.

The quantitative survey showed that QOCW consistently delivered upon and, in some cases, exceeded expectations regarding the functional aspects of a trip. Despite this result, visitors would also need to have had a number of memorable experiences, or experiences unique to the destination to be very satisfied with their time in the region.

As a group, visitors experienced a wide range of attractions in different towns, with a number of attractions consistently rated as highlights on their trip. Individually, however, visitors only tended to experience a few attractions on a single trip. This was largely because they had not allowed enough time to see more attractions or because they were not aware of them (either at all, or in time to visit during their trip).

Interaction with the people who live or work in the region can also drive higher levels of satisfaction with the region. The local characters — with their personal anecdotes, insider knowledge and unique Outback charm — appear to ignite visitors' interest in exploring the region. Visitors and locals were most likely to interact at attractions; Visitor Information Centres (VICs); caravan parks (e.g. the entertainment); and at local businesses (e.g. a pub or cafe). For the majority, the best encounters tended to happen at attractions and caravan parks, however, due to variation in the level of knowledge and enthusiasm of guides at attractions and given the entertainment at caravan parks can be seasonal or infrequent, visitors didn't always have the opportunity to experience this interaction.

Consequently, the average satisfaction levels for the region were quite likely due to visitors simply missing out on many of the unique attractions and local charm that QOCW has to offer.

## **Trip planning and booking**

It is, therefore, important that the region engages travellers; firstly when they are planning their trip to (or through) the region, so that they plan to travel there at the 'right' time and allow enough time to experience a lot of what is on offer; and secondly, when they are in the region, so that their time is well spent and is as enjoyable or fulfilling as possible.

Both the quantitative and qualitative research found that visitors made use of a range of information and booking resources. The major sources consulted were VICs, guidebooks, travel publications and the 'bush telegraph'. The internet was also a major source but the qualitative research indicated that this was primarily for pre-trip research.

Travel publications, such as *Camps Australia Wide* and the Royal Automobile Club of Queensland's (RACQ) guides were typically used by all travellers for information on routes and caravan/camping sites. Those with less experience of the region relied on these publications more heavily; those with more experience typically used them as a back up to supplement existing knowledge.

VICs were a key information and booking resource for travellers who were interested in finding out more about the region, and this included both the less experienced and the experienced visitors. The VICs can, therefore, play a significant role in 'selling' the region and individual towns, by ensuring visitors get the most out of their overall experience of the region and 'planting seeds' to entice visitors to come back to the region or to explore more areas within the region.

Tourist guidebooks were also used to supplement the information gained from the VICs.

## **Recommendations**

A number of recommendations were developed for further consideration based on the findings of the research:

### **1. Product and service delivery**

Encourage staff in VICs as well as tourism operators to provide information beyond their immediate area or town, which will enable visitors to plan their current and potential return trip. This will require equipping VICs and tourism operators with information on all facets of the in-region experience, including attractions, tours, road conditions, dealing with road trains, weather, bookings/vacancies, dining and accommodation options and schedule of entertainment and events.

### **2. Product development and diversification**

Continue to encourage local operators to develop their products through diversification which enhances the visitor experience. Consider developing product around Indigenous history and its role in Australia's pioneering history.

### **3. A balance between the visitor experience and sustainability**

Given the importance of the non-commercial caravan or campers to the region, ensure there are facilities available for these visitors to have a real outback experience in the region without damaging the natural environment.

#### 4. Stimulating consumer demand

Promote the region more extensively to prospective or first-time visitors, so that they see it as a destination from the outset. In promoting the region, position it in terms of the overall experience you can have there, rather than lead with specific attractions:

- leading with attractions can narrow perceptions of what the region offers
- attractions should support, rather than represent, the region.

The positioning communicated should highlight the unique experience on offer relative to other outback regions and other Queensland or Australian touring destinations:

- Consider positioning the region around pioneering heritage and rural life
- Optimise internet search terms to enhance perceptions of Queensland's Outback as a region, and therefore a destination, for first-time travellers pre-planning their trip
- Use visitor testimonials to help promote the region (e.g. leverage the 'bush telegraph') to those planning their trip, both online and offline.

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