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VISITOR INFORMATION SERVICING IN NEW SOUTH WALES

SUMMARY

JUNE 2016

VISITOR INFORMATION SERVICING IN NEW SOUTH WALES

INTRODUCTION

Visitor information centres (VICs) continue to be an important and reliable source for informing and educating visitors about local areas and tourism products, despite increasing numbers of people using digital channels for searching, selecting and booking travel.

Tourism Research Australia (TRA)—in partnership with Destination NSW—contracted ORIMA Research to examine how visitors access information for their trips, to review the current role of VICs and their importance in delivering information services, and to identify visitor information servicing strategies. This summary reports on key findings from the research, including:

- VIC users and non-users' profile
- use of information sources for trip planning
- booking travel before and after arrival at the destination
- awareness of VICs
- engagement with destination VICs
- VIC impact on visitor behaviour
- VIC satisfaction, advocacy and importance
- reasons for not using VICs
- stakeholder perceptions of VICs
- improvement opportunities.

Cover image: The Rocks Visitor Information Centre, Sydney
Courtesy of Sydney Harbour Foreshore Authority

KEY MESSAGES

- With fixed and mobile internet services having a growing influence on trip planning, and information search patterns becoming increasingly varied, VICs continue to be the leading information source for visitors during their visit (42%). In contrast, only 10% used the website of the destination VIC pre-visit. Satisfaction with VIC websites was relatively low at 62%.
- The top information sources used pre-visit were online travel sites (34%), direct with operator/provider (17%), recommendation from friends/relatives (17%), and internet search (14%).
- Top information items sourced pre-visit were accommodation (33%) and things to see and do (32%), and during the visit were things to see and do (55%), local maps (34%) and restaurants (32%).
- The rates, types and methods of booking vary considerably. Among those making a booking prior to arrival, 93% reported booking accommodation, while for those making bookings after arrival, accommodation (47%) was still the most frequently booked product. Pre-visit bookings were mostly made with operators (55%) or through online travel providers (32%). While only 1% booked through the VIC pre-trip, 14% booked with the VIC after arriving at the destination. Satisfaction with VIC booking services was relatively low at 51%.
- The top information used by visitors at the VIC were maps (53%), information on attractions (51%) and information on local events and activities in the area (24% and 23%, respectively).
- Only 18% reported spending money during their visit to the VIC, with the average spend being $59 per person.
- The VICs influenced travel plans and activities of users, with 27% visiting more attractions and events than they had intended, and 24% making a day trip to surrounding areas.
- Overall satisfaction with VICs was very high (97% satisfaction rating) and almost 95% would recommend the VIC to their friends or relatives.
- Almost three-quarters (71%) of non-VIC users have used a VIC elsewhere in the past three years. Key reasons for not using the VIC in the surveyed destination were sufficient information from other sources (12%), preference to get advice from family and friends (12%) and lack of knowledge of VIC location (11%).

RESEARCH APPROACH

The research was conducted as a multi-phased project and focused on the Accredited Visitor Information Centres (AVICs) in NSW[1]. However, the learnings from the research can be applied to all types of visitors and VICs in New South Wales (NSW).

DESKTOP ANALYSIS

Previous research and academic articles were reviewed to understand consumers' use of information sources for trip planning, and the range of operating and funding models used by VICs in New South Wales (NSW) and other jurisdictions.

Image: Shoalhaven Heads, South Coast
Courtesy of Hamilton Lund; Destination NSW

1 Destination NSW is the organisation responsible for accrediting VICs in NSW. The symbol for accredited VICs in NSW is the itacilised symbol '*i*'.

QUANTITATIVE RESEARCH

Research was undertaken during April and May 2015 through intercept interviews with visitors at selected VICs[2] and major tourism attractions. The interviews occurred at 11 locations across the zones of Greater Sydney, Sydney Surrounds, North Coast, South Coast and Inland[3].

This provided a sample of 534 users and 507 non-users of VICs[4], of which 154 also completed an online follow-up survey on their return home. Table 1 provides a profile of the VIC users and non-users interviewed. Overall, VIC users were more likely to be:

- female (53% compared with 44% of VIC non-users)
- aged 60 years or more (39% compared with 33%)
- travelling as a couple (51% compared with 39%)
- overnight visitors (65% compared with 44%)
- visiting from interstate (41% compared with 33%)
- visiting the destination for the first time (49% compared with 32%).

The VIC user (22%) and non-user (21%) groups included a similar proportion of international visitors. However, it should be noted that more than half of all international visitors were interviewed in the Sydney zone where they form a more prominent part of the visitor mix than elsewhere in NSW.

2 The AVICs selected in the research were spread out geographically across Destination NSW's five visitor economy administration zones, and represented different types of funding and operating arrangements.

3 Parramatta and The Rocks in the Greater Sydney zone; Central Coast (Kariong) and Hunter Valley (Pokolbin) in the Sydney Surrounds zone; Coffs Harbour and Tweed Heads in the North Coast zone; Batemans Bay and Bega in the South Coast zone; and Cooma, Cowra and Dubbo in the Inland zone.

4 Users were interviewed at the VIC in the location they were visiting, and non-users were interviewed at major tourism attractions in VIC locations. Non-users had not visited a VIC in the location they were visiting prior to their main interview. However, 17% of VIC non-users responding to the follow-up survey reported visiting the destination VIC later in their stay.

TABLE 1: PROFILE OF RESPONDENT SAMPLE

DEMOGRAPHIC AND TRIP CHARACTERISTICS	VIC USERS	VIC NON-USERS
Sex		
Male	47%	56%
Female	53%	44%
Age		
18–39 years	29%	31%
40–59 years	33%	36%
60 years or more	39%	33%
Origin		
International	22%	21%
Interstate	41%	33%
Intrastate	37%	46%
Trip type		
Day trip	35%	56%
Overnight trip	65%	44%
First or repeat visitor		
First-time visitor	49%	32%
Visited in last 12 months	22%	36%
Visited more than 12 months ago	30%	32%
Travel party		
Travelling alone	15%	17%
As a couple	51%	39%
Family group	17%	25%
Friends and relatives	14%	16%
Other	2%	3%

QUALITATIVE RESEARCH

Fifty-five tourism representatives[5] across 18 VIC locations were consulted through a combination of face-to-face and in-depth telephone interviews[6]. They included VIC managers, owners and stakeholders. The interviews were supplemented by observation of operations at the 18 selected VICs[7].

Image: The Rocks, Sydney
Courtesy of Destination NSW

5 Comprised 16 VIC managers, 17 VIC owners and 22 VIC stakeholders across the 11 VIC locations where user interviews were conducted plus 7 other VICs that included Wollondilly (Picton), The Entrance, Echo Point, Lismore, Ulladulla, Mudgee and Broken Hill.

6 In-depth interviews varied from 30 to 60 minutes duration.

7 An observation checklist was used covering physical location; signage; online presence; visual presentation and amenities; products and services; and staffing.

AWARENESS OF VICS

Awareness levels of VICs varied considerably between domestic and international visitors.

Overall, 57% of all survey respondents knew there was a VIC prior to arrival at their intended destination—11% who had obtained information from the VIC pre-visit[8], and a further 46% who hadn't but knew of the VIC. Rates of VIC awareness were significantly greater for intrastate (66%) and interstate visitors (60%), than for international visitors (34%).

Reflecting the prominence of domestic travellers in their customer mix, awareness of the VIC was highest among visitors to Inland NSW (73%) and the South Coast (66%). In contrast, awareness was lowest among visitors to Greater Sydney (37%), driven by the greater representation of international travellers in their customer mix. Visitors aged 60 years and over reported high rates of VIC awareness (68%), while visitors aged 18 to 39 years had low rates of VIC awareness (40%).

Image: Sydney Tower Eye
Courtesy of Sydney Tower Eye

8 Including 6% who had visited the VIC's website, 5% who had visited another VIC, and 1% who had phoned the VIC.

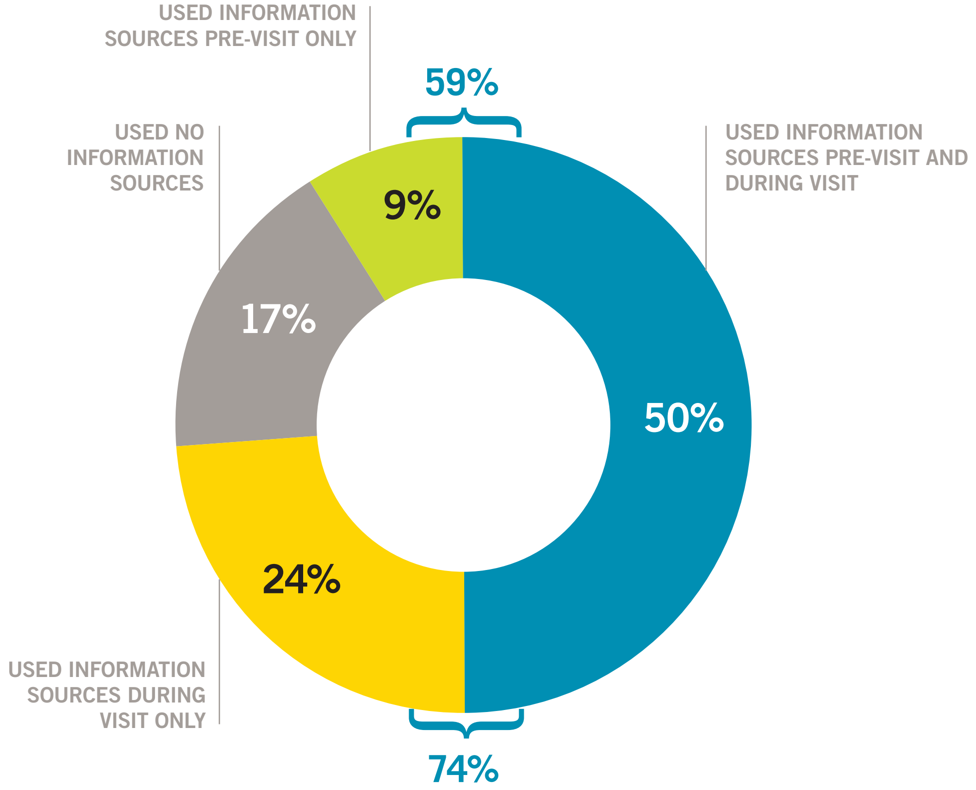
CONSUMER USE OF INFORMATION SOURCES FOR TRIP PLANNING

WHO ACCESSED INFORMATION PRE-VISIT AND MID TRIP?

The majority of visitors to a destination sourced information pre-visit and/or during their stay.

Overall, 83% of survey respondents sought information about their destination. While a higher proportion accessed such information during their visit (74%) than pre-visit (59%), half made use of information pre-visit and on arrival at their destination (Figure 1).

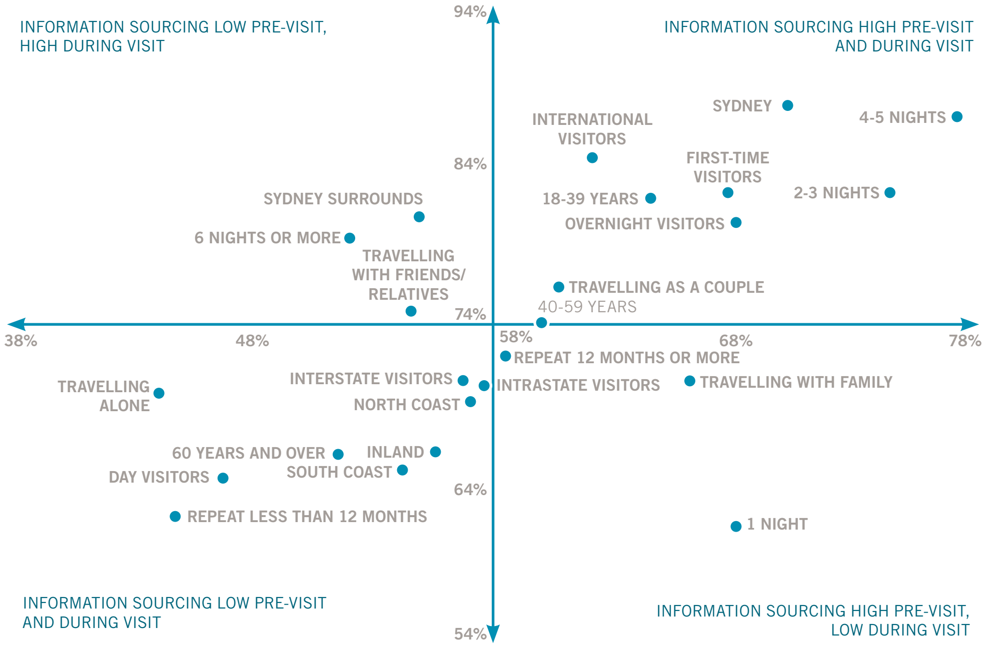
FIGURE 1: USE OF INFORMATION SOURCES



Results indicate that information searching and trip planning vary depending on the nature and complexity of the trip, familiarity with the destination, and by demographic profile (Figure 2):

- Overnight visitors were much more likely than day visitors to seek information pre-visit (68% compared with 46%) and during their visit (81% compared with 65%).
- Overnight visitors with a length-of-stay of 2 to 5 nights had high rates of information use pre-visit (76%) and during their stay (85%). Those staying 1 night were the only visitor group to have a higher rate of information use pre-visit (68%) than during their stay (61%).
- While international, interstate and intrastate visitors had similar rates of information use pre-visit, those from overseas (85%) were more likely than domestic travellers (71%) to seek information during their stay.
- Visitors to Sydney had much higher rates of information use pre-visit (71%) and during their stay (89%) than those who visited other zones in NSW (56% pre-visit; 71% during stay).
- First-time visitors were among those most likely to seek information pre-visit (68%) than during their stay (83%).
- Visitors returning to a location within 12 months of a previous visit had comparatively low rates of information use (45% pre-visit; 62% during stay).
- Visitors travelling with their partner had higher rates of information use pre-visit (61%) and during their stay (77%) than those travelling alone (44% pre-visit; 70% during stay).
- Over two-thirds of family groups made use of information pre-visit (67%), with the rate higher for use during their stay (71%).
- Those aged 18 to 39 years were more likely to seek information pre-visit (65%) and during their stay (83%) than older travellers. Visitors aged 60 years or more had lower than average rates of information use pre-visit (51%), and during their stay (66%).

FIGURE 2: INFORMATION SOURCING, BY VISITOR PROFILE



Results also indicate that seeking information pre-visit may encourage (or at least not discourage) a visit to the destination VIC on arrival. Overall, a higher rate of VIC users (63%) than non-users (54%) sourced information about their destination pre-visit.

HOW AND WHAT INFORMATION IS ACCESSED PRE-VISIT AND MID-TRIP?

With fixed and mobile internet services having a growing influence on trip planning, information search patterns are becoming increasingly complex and fragmented as consumers combine use of both online and offline sources.

The research found that internet information sources are now the primary tool used to access visitor information. Overall, nearly two-thirds of the surveyed respondents who obtained information pre-visit (63%) used online sources[9]. More specifically, 34% reported using internet travel websites, making these the most frequent source of information used ahead of direct engagement with tourism operators (17%), and word-of-mouth referrals (also 17%).

With 87% of survey respondents reporting travelling with one or more mobile devices (78% with smartphones, 42% with tablets and 26% with laptops/notebooks), visitor use of online information sources was also common at destination. Among those travelling with such devices, nearly three-quarters (71%) used them to obtain navigation and/or travel information, or to make bookings during their stay.

Although online sources of information were clearly important pre-visit and during the visit, survey results also show that the nature of search patterns varied across the trip cycle, with the sources used at the destination more fragmented. Most notably, word-of-mouth referrals featured more prominently pre-visit, and VICs were a leading source of information during the visit (Table 2).

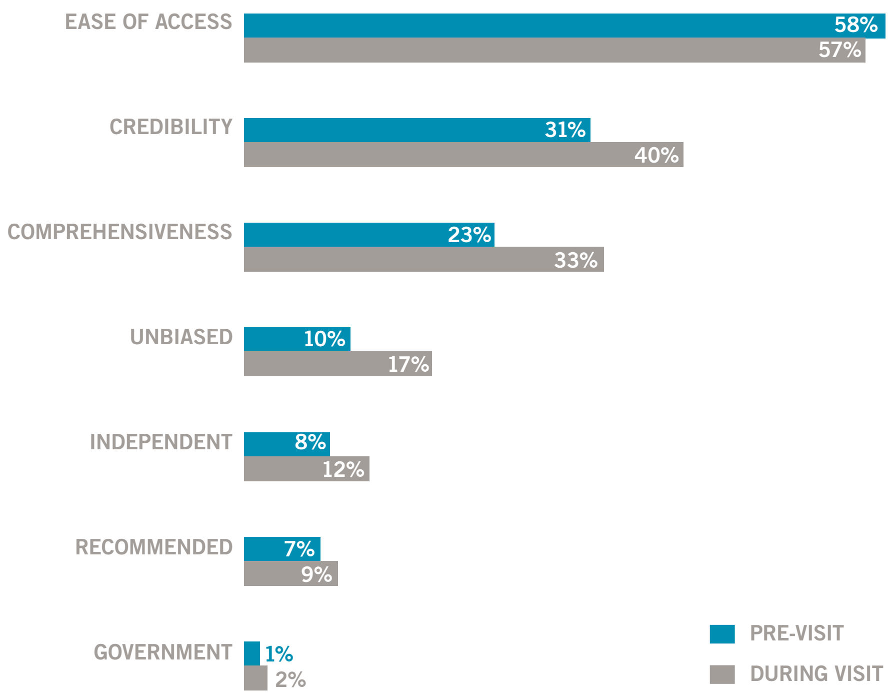
9 Used one or more of the following: VIC's website; social media; online travel sites; airlines; state tourism websites; regional tourism websites; and general internet searches.

TABLE 2: TOP 10 SOURCES USED[10]

PRE-VISIT	
1. Online travel sites	34%
2. Direct with operator/provider	17%
3. Recommendation from friends/relatives	17%
4. Internet search (in general or google)	14%
5. Travel book, guide, brochure (not online)	12%
6. Been there before	12%
7. State tourism website	11%
8. Visited website of destination VIC	10%
9. Had visited another VIC	9%
10. Regional tourism website	8%
DURING THE VISIT	
1. Visited the VIC at destination	42%
2. Talked to locals for advice	23%
3. Online travel sites	14%
4. Recommendation from friends/relatives	12%
5. Visited website of destination VIC	11%
6. Referrals/word-of-mouth	10%
7. Travel book, guide, brochure (not online)	9%
8. Talked to wait/café staff	9%
9. Travel desk at accommodation establishment	8%
10. Social media	7%

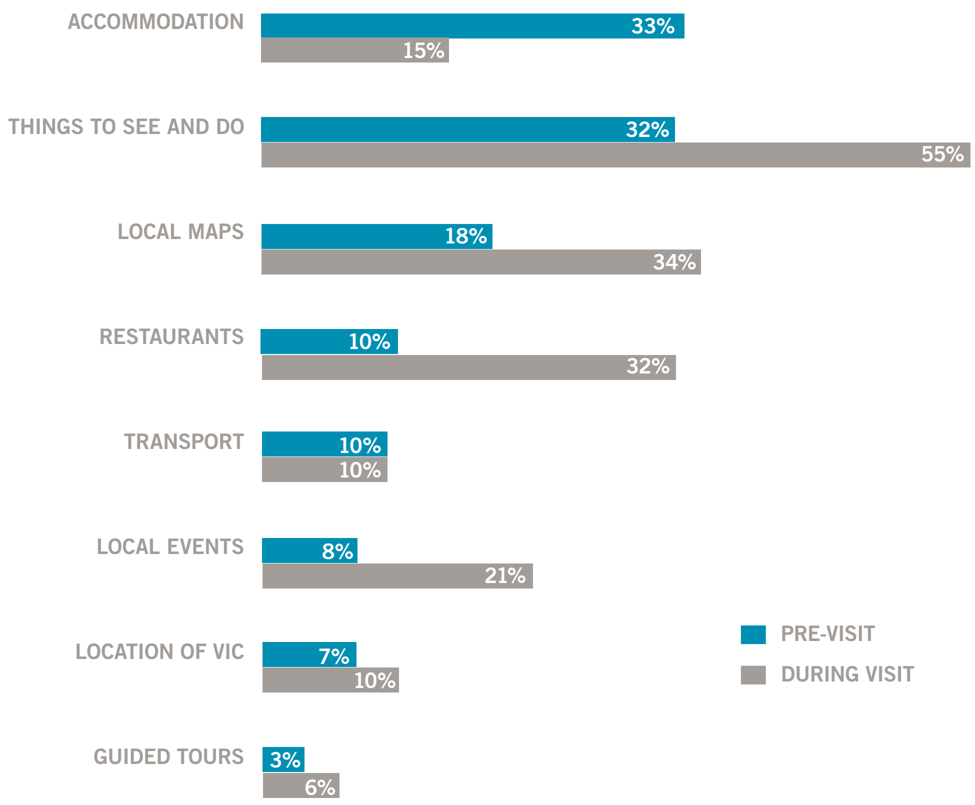
10 The base for pre-visit is all respondents who had previously reported seeking information pre-visit at question B1. The base for mid-trip is all respondents with a mobile device who had previously reported seeking information mid-trip at question C3, and all non-mobile device holders.

FIGURE 3: REASONS FOR USING MOST IMPORTANT INFORMATION SOURCE



Ease of access was the leading reason given by respondents for use of the information source they used most pre-visit (58%), and during their stay (57%). However, reflecting the more prominent role of word-of-mouth referrals and VICs at destination, visitors cited the credibility and comprehensiveness of the most used information source as more important during their stay than pre-visit (Figure 3).

FIGURE 4: INFORMATION ITEMS SOURCED, PRE-VISIT AND DURING VISIT



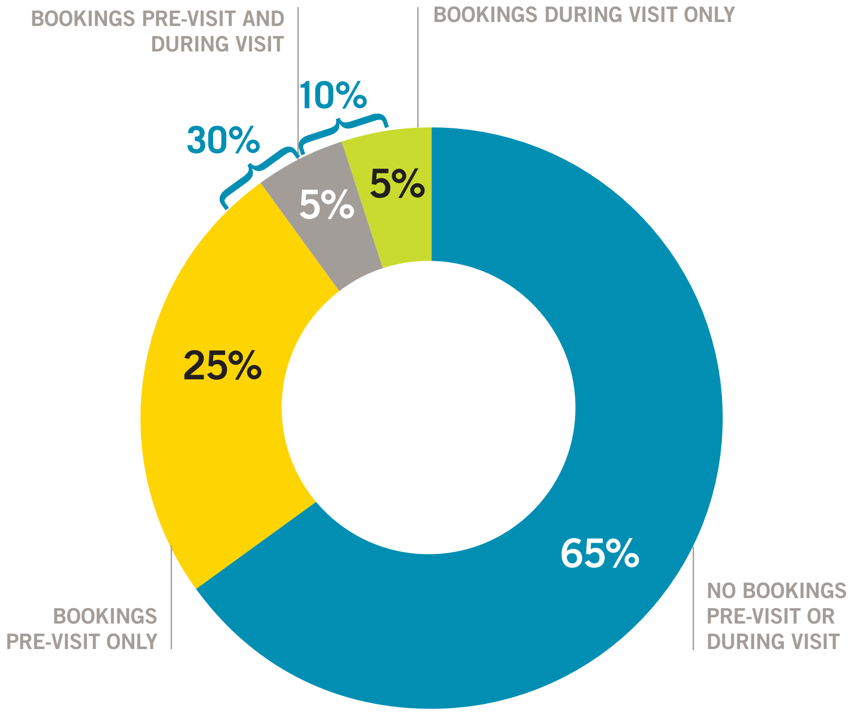
Where respondents sought information, there were also differences in what they looked for prior to travel and at the destination. Pre-visit, visitors were most often seeking information on accommodation (33%), and things to see and do (32%). During their stay, the visitor focus largely related to on-the-ground activities, with more than half interested in things to see and do (55%), followed by information on local maps (34%), restaurants (32%), and local events (21%) (Figure 4).

BOOKING TRAVEL PRE-VISIT AND AFTER ARRIVAL

The rates, types and methods of booking vary considerably pre-visit and after arrival.

More than one-third of survey respondents (35%) booked travel products for the destination visited. They were almost three times more likely to have made their booking(s) pre-visit (30%), than on arrival (10%), with a few (5%) having pre-visit and at destination bookings (Figure 5).

FIGURE 5: BOOKINGS, PRE-VISIT AND DURING VISIT:



Pre-visit and at destination bookings were dominated by overnight visitors. Nearly half (48%) of all overnight visitors booked travel before arrival[11], while 17% booked items at their destination. In contrast, day visitors rarely made bookings pre-visit (6%), or during their stay (2%).

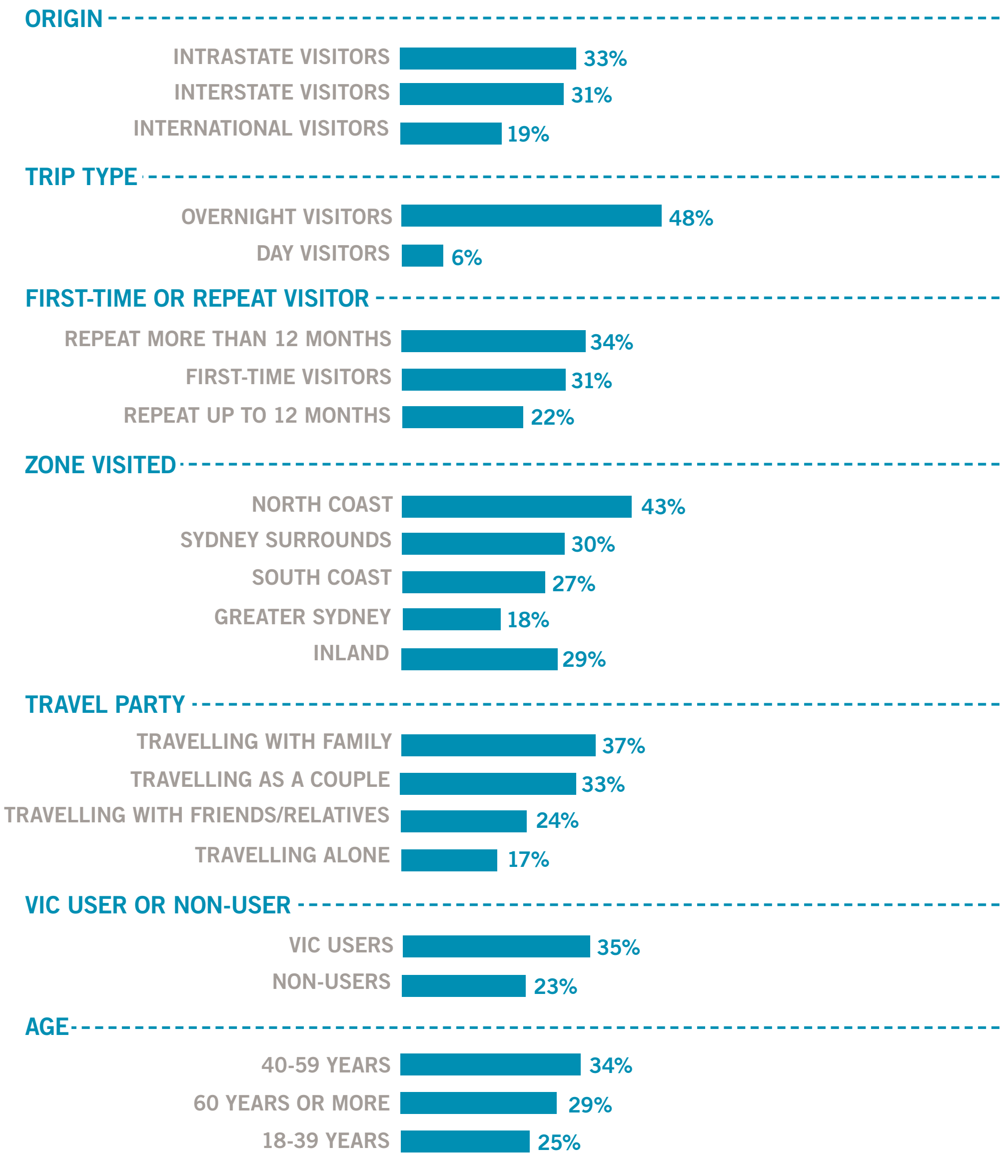
Travel was also more likely to be booked pre-visit by:

- visitors to the North Coast (43%), than other zones in NSW
- those visiting as a family group (37%), than by other travel parties
- VIC users (35%), than non-users (23%)
- respondents aged 40 to 59 years (34%), than those younger or older (Figure 6).

Image: Wollongong, Illawarra
Courtesy of Skydive the Beach and Beyond, www.skydive.com.au

11 Rates were highest for those staying 2 or 3 nights (55%), and 4 or 5 nights (54%).

FIGURE 6: BOOKING RATES PRE-VISIT, BY VISITOR PROFILE



Among those who made bookings pre-visit, nearly all (93%) reported booking accommodation, while less than 10% booked any other items. For those who made bookings during their stay, accommodation (47%) was also the most commonly booked item, but there were also much higher booking rates for restaurants (27%), attractions (20%), and activities (19%) among these visitors than those who booked pre-visit.

Pre-visit bookings were predominantly made direct with operators (55%), or through online travel providers (32%). More than half made their booking online (60%, via computer, laptop, tablet or smartphone), while a further 39% booked via telephone. On arrival, two-thirds of visitors who made bookings did so directly with providers. These bookings were more likely to be made in person (52%), or by phone (33%), than through online channels (23%).

Image: Port Stephens, North Coast
Courtesy of Hamilton Lund; Destination NSW

ENGAGEMENT WITH DESTINATION VICS

USE OF VIC WEBSITES

Although rates of use are currently relatively low, VIC websites broaden the options available for accessing VIC services.

While VIC services are typically accessed through visits, digital channels increasingly offer the potential to extend the reach of VICs. Despite the myriad of online options from which travel information can be sourced, 9% of all visitors (14% of VIC users and 4% of non-users) visited the destination VIC's website during their stay, while 6% (8% of VIC users and 4% of non-users) did so pre-visit.

VISITS TO VICS

Visits to VICs are more likely to be planned than spontaneous but this varies between visitor groups. On arrival, visitors most often use local maps and/or information on attractions, events and activities.

Among VIC users, more than half (56%) stated that their visit was planned. Of these:

- 34% used signage to locate the VIC
- 27% had prior knowledge of the VIC
- 15% were referred to the VIC by friends or family
- 12% heard about the VIC from locals.

Planned visits were particularly common for respondents aged 60 years and over (70%), but much less so for those aged 18–39 years (38%). Similarly, planned visits were more prominent for domestic intrastate (61%), and interstate (53%) visitors, than for international (47%) visitors. These differences in visit behaviour are reflected at the regional level. Rates of planned visits were high for the Inland (78%) and South Coast (64%) zones, where VIC users were largely domestic visitors and had an older age profile (Figure 7).

FIGURE 7: PLANNED OR SPONTANEOUS VISITS TO VICS, BY VISITOR PROFILE

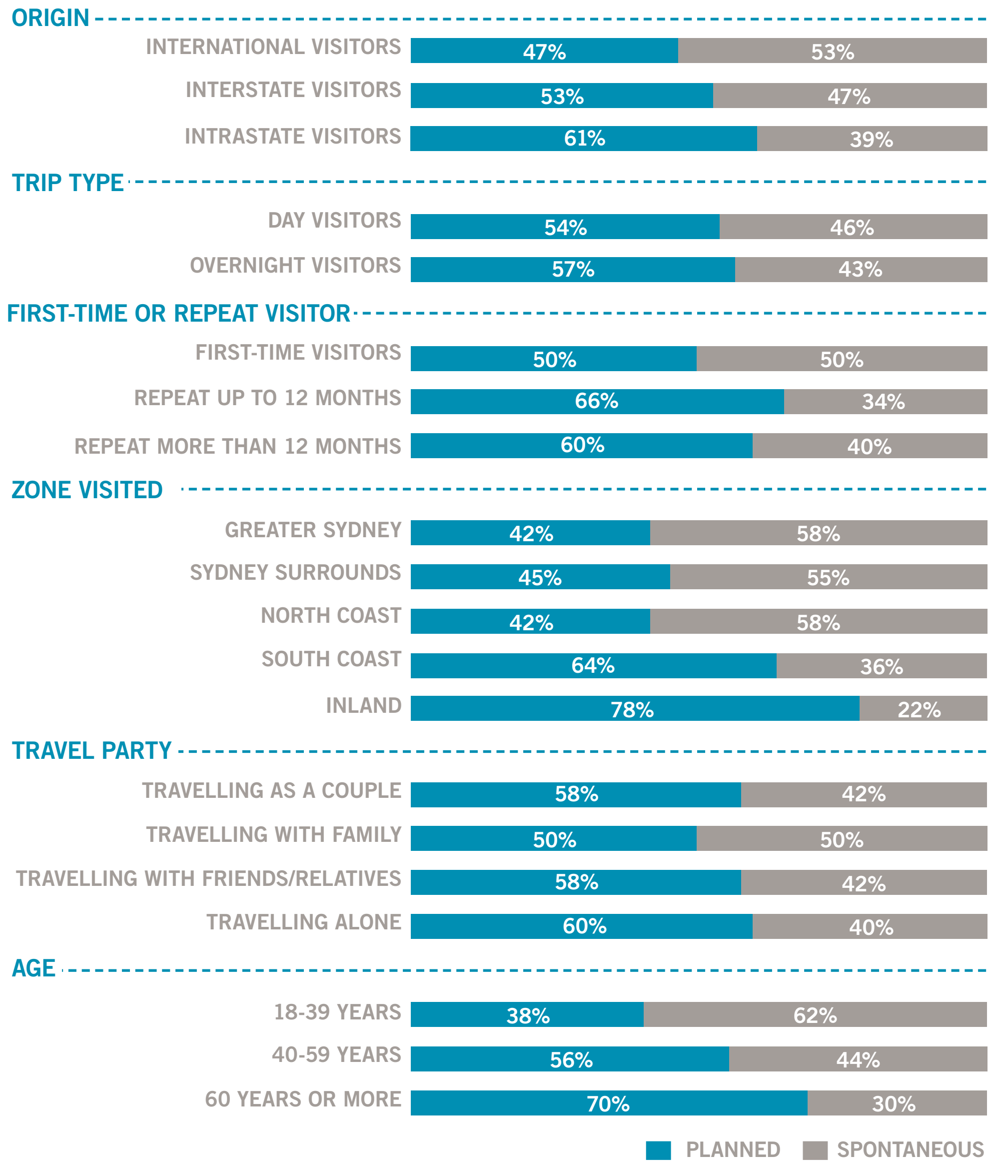
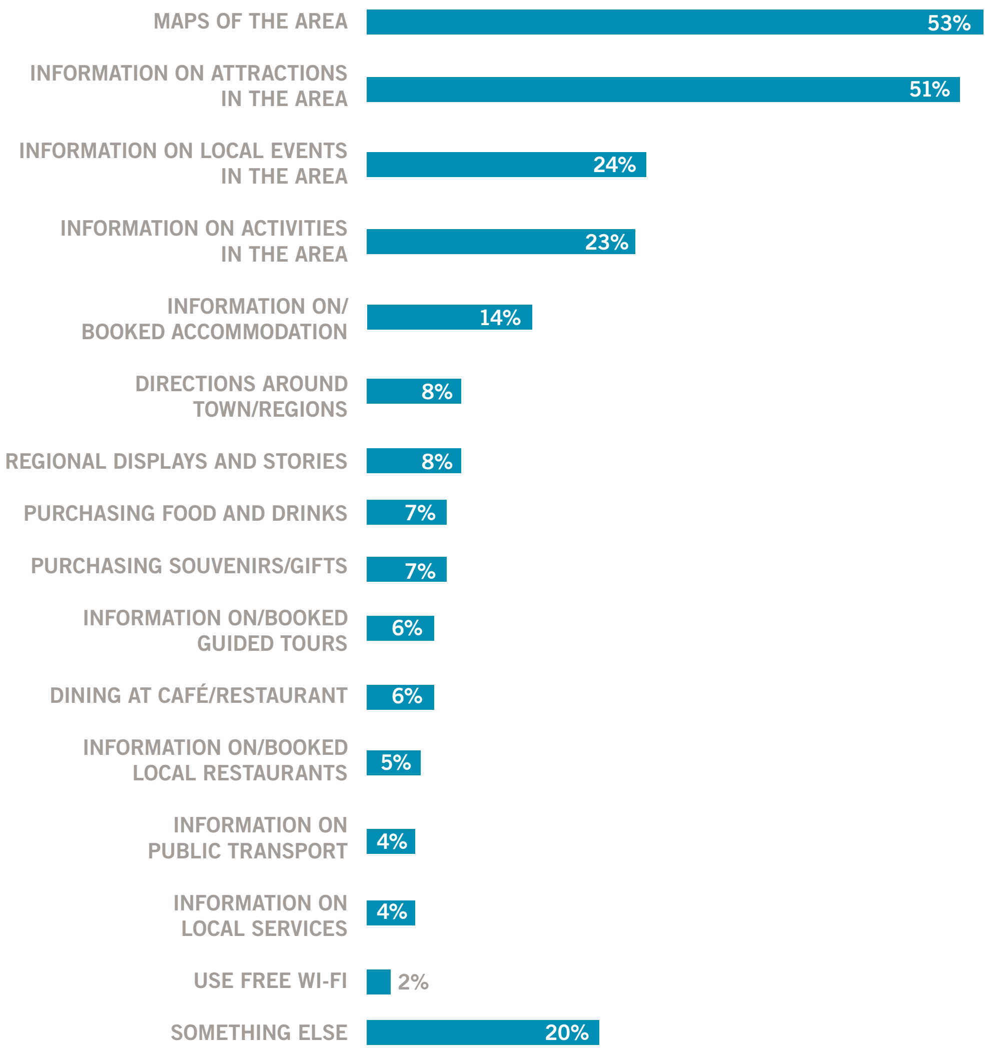


FIGURE 8: TYPES OF INFORMATION USED AT THE VIC



While visiting a VIC, more than half the visitors interviewed used maps of the area (53%) and/or information on local attractions (51%). Information on local events (24%), and activities (23%) were also commonly used (Figure 8).

SPENDING AT VICS

The prevalence of spending and the amount spent varies by location, reflecting differences in product and booking offerings available at VICs.

Overall, 18% of VIC users (and/or members of their travel party) reported spending money during their visit to the VIC, with the average amount spent $59 per person. However, both the incidence of spending and the average amount spent varied by VIC:

- Visitors to Hunter Valley (37%), Cowra (35%), Dubbo (31%) and The Rocks (29%) were the most likely to report expenditure at the VIC, whereas the rate was less than 10% for visitors to the Central Coast, Coffs Harbour and Tweed Heads VICs.
- Average spend (per person) was much higher at The Rocks ($139), Hunter ($96), and Batemans Bay ($94) VICs than other locations, where the average was $20 or less, with the exception of Coffs Harbour ($47).

Of those with expenditure, visitors most often reported purchasing souvenirs (80%) or food and drinks (36%). Fewer visitors (17%) had VIC expenditure on bookable products such as accommodation, attractions, tours and events. However, when purchased, average spend on these items ($206) was significantly higher than for souvenirs ($18), or food and drink ($20).

Image: Blue Mountains
Courtesy of Destination NSW

VIC STAFF INTERACTION

The majority of VIC users spoke to VIC staff as part of their visit and most were highly satisfied with the service provided.

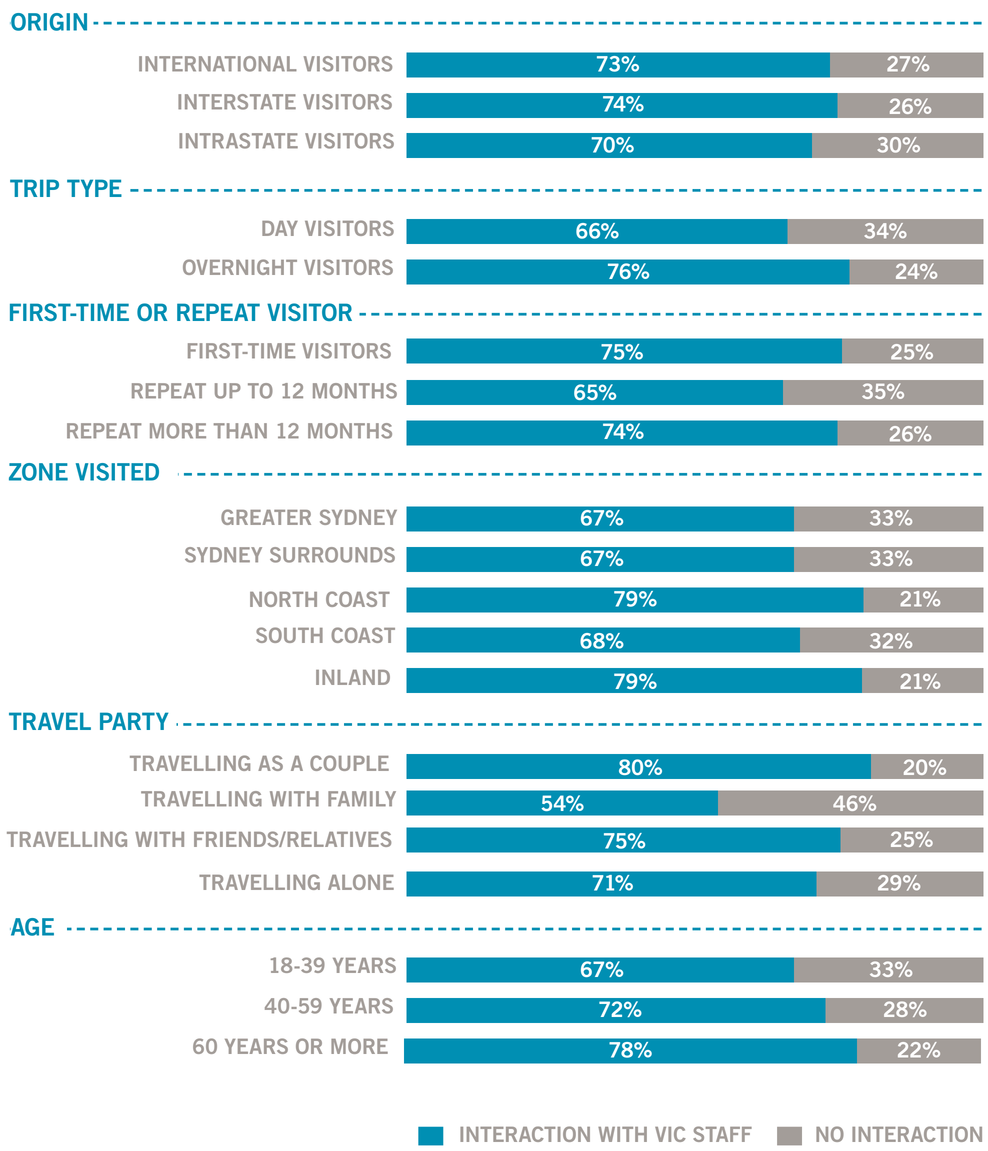
While overall almost three-quarters (73%) of VIC users spoke to staff during their visit, this varied between visitor groups:

- Couples (80%) had a much higher rate of interaction than family groups (54%), indicating that the presence of children in a travel party considerably reduces the likelihood of conversation with staff.
- Visitors aged 60 years or more (78%) were also more likely to speak to staff than those aged 18–39 years (67%), as were a larger share of overnight visitors (76%), than day visitors (66%).
- Visitors to the Inland (79%) and North Coast (79%) zones were more likely to speak to staff than those visiting other locations (Figure 9).

VIC users who spoke to staff rated their interaction with staff very highly, with more than 90% of respondents agreeing that they:

- provided good customer service (99%)
- provided information that was useful (98%)
- understood the type of information being looked for (98%)
- were knowledgeable about the area (97%)
- provided information that was impartial (93%)
- were knowledgeable about specific attractions, events and activities (93%).

FIGURE 9: RATES OF INTERACTION WITH VIC STAFF, BY VISITOR PROFILE



IMPACT OF VICS ON VISITOR BEHAVIOUR

Results indicate that VIC usage influences travel and spending behaviour although the extent of the impact was difficult to measure.

The in-destination interview of VIC users indicated that the majority were influenced by their VIC visit, with:

- 70% likely to spend additional money during their stay[12]
- 68% likely to visit nearby locations as a result of their VIC visit
- 63% likely to undertake additional activities due to their VIC visit.

In addition, 16% of VIC users indicated they would extend their stay.

The online follow-up survey was inconclusive in establishing the rate with which VIC users actually spent additional money and how much more they spent. However, it did confirm that 56% of VIC users changed their travel plans as a result of the VIC visit, most often leading them to visit more attractions (27%), or make a day trip to nearby locations (24%).

Image: Walkabout Tours, Blue Mountains
Courtesy of Paul Blackmore; Destination NSW

12 Only those VIC users who spent money at a VIC were asked if they expected to spend additional money on their visit as a result of visiting the VIC.

VIC SATISFACTION, ADVOCACY AND IMPORTANCE

VIC users' overall satisfaction with their VIC visit was very high and almost all would recommend the VIC to their friends or relatives.

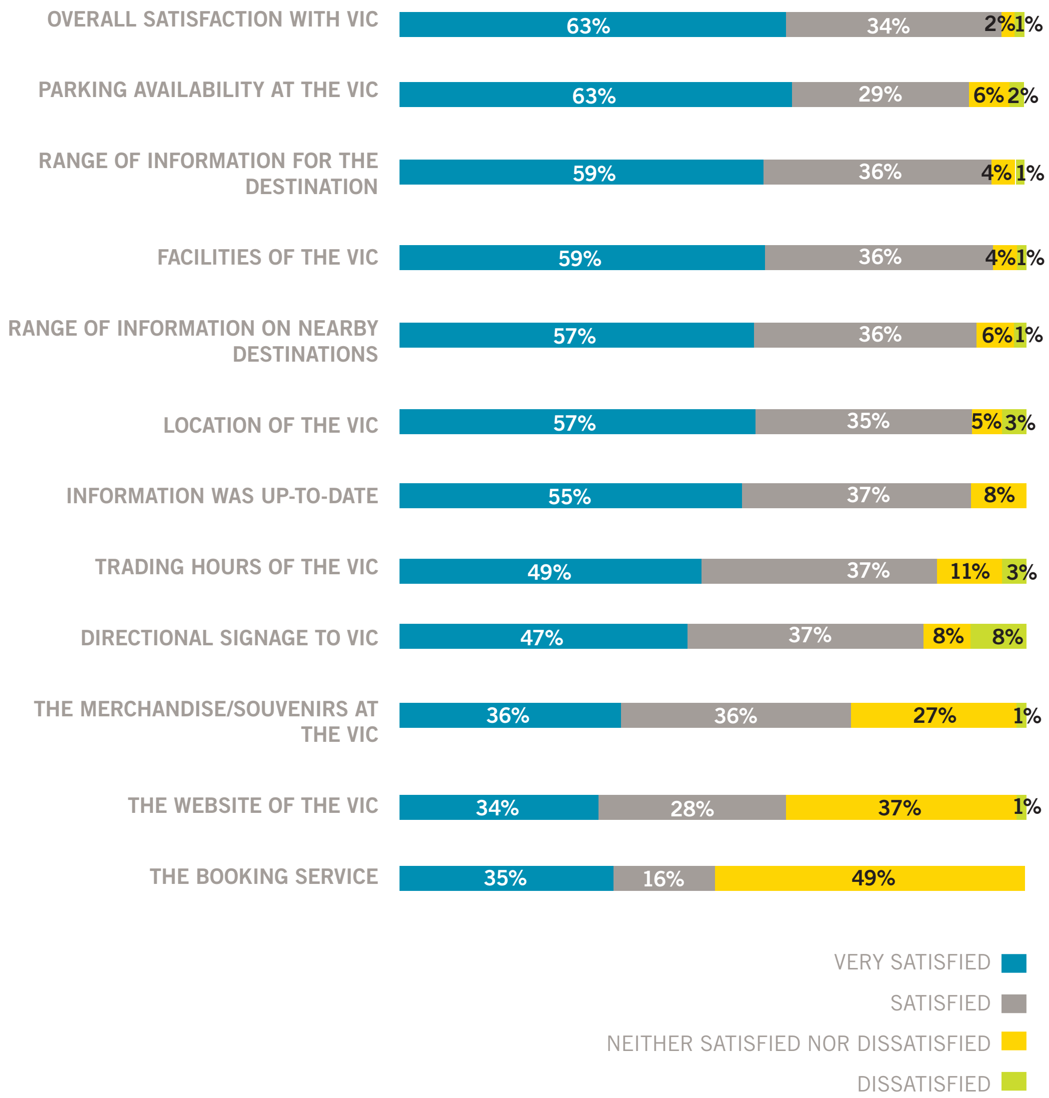
Nearly all VIC users said they were very satisfied or satisfied with their VIC visit (97%). This can be linked to their satisfaction with many of the VIC attributes:

- 96% were very satisfied or satisfied with the range of information available
- 95% with the facilities of the VIC
- 93% with the information available for nearby destinations
- 92% with the availability of up-to-date information
- 92% with the location of the VIC[13]
- 91% with the availability of parking
- 86% with the trading hours of the VIC
- 84% with the directional signage for the VIC.

Although satisfaction ratings were lower for VIC merchandise and souvenirs (72%), the VIC website (62%), and the VIC booking service (51%), this seems to have been due to lack of interest/use of these services rather than dissatisfaction following use (Figure 10).

13 Of those satisfied with the location of the VIC, 40% liked that the VIC was on a main road, and 29% that it was in the centre of town.

FIGURE 10: SATISFACTION WITH VICS, OVERALL AND SELECTED ATTRIBUTES



VIC users' high level of satisfaction with their VIC visit had a number of positive impacts[14]:

- 95% would recommend the VIC to friends or relatives visiting the area
- 94% would look out for and use a VIC when travelling in the future
- 80% agreed that their visitor experience had been positively influenced by their VIC visit.

Results also highlight the value attributed to VICs by those who visited them. Overall:

- 91% agreed that the VIC was an important part of the visitor experience
- 87% reported knowing more about things to see and do within the destination after going to the VIC
- 86% reported knowing more about things to see and do in nearby destinations after going to the VIC
- 85% agreed that the VIC showcased the destination's key experiences.

14 Result for future VIC use sourced from the online follow-up survey.

VIC NON-USERS

Most respondents who did not use a VIC in the destination on this visit had used VIC services at least once in the past three years.

Results indicate that most travellers will use VIC services at one time or another. Almost three-quarters of non-users in the study (71%) reported using a VIC elsewhere in the past three years, including 15% who had visited another VIC earlier in their trip.

Half (50%) of the VIC non-users stated they would have gone to the VIC if they had happened to drive or walk past, while those non-users who indicated they would not have visited the VIC if passing by, most commonly gave the following reasons for not doing so:

- no need to visit the VIC (32%)
- gathered sufficient information from other sources (12%)
- a preference to rely on referrals and advice from family and friends (12%)
- been a regular visitor to the area (12%)
- no knowledge of the VIC location (11%).

QUALITATIVE RESEARCH

Following are observations drawn from the in-depth interviews with VIC managers, owners and stakeholders, and from VIC observations:

- The quality of customer service delivered by the VIC network was perceived as a key strength and differentiating factor relative to other information channels.
- Having an online presence for both the destination and the VIC is needed to respond to the growth in fixed and mobile internet information sourcing.
- Social media marketing has the potential to build VIC engagement with consumers and industry stakeholders in a cost effective manner.
- Increasing collaboration with other VICs, industry partners and local government such as Regional Tourism Organisations and Local Tourism Organisations will improve the VIC network at the operational and strategic levels, and help promote and sustain the local tourism industry.
- Engaging with local residents and businesses is a cost effective means of raising VIC awareness.
- Highly visible and centrally-located VICs with proximity to local accommodation and tourist attractions or co-locating with complementary services are critical to increasing patronage and reducing VIC overhead costs. Directional VIC signage is highly important, particularly for driving spontaneous visitation.
- Providing mobile VIC services or roving ambassadors during local events or festivals and holiday periods will enable greater VIC reach and awareness.
- Local government should continue to play a key role in funding VICs due to their contribution to local economies and communities.
- Merchandising, booking commissions and complementary commercial services provide VICs the opportunity to maximise returns on increasingly limited budgets. Commercial sponsorship of VICs was seen as an under-utilised opportunity to increase revenue.
- Observation of surveyed VICs yielded favourable assessments in terms of staff knowledge and customer service, availability of a broad range of up-to-date brochures, internal signage and layout and floor space, physical location and parking. Physical presentation and branding varied considerably across surveyed VICs.