



Destination Visitor Survey Strategic Regional Research – New South Wales

Visitor dispersal from Sydney to regional NSW – Summary of results

Introduction

This research project provides a comprehensive review of the *Sydney fly-in leisure market*, as defined by:

Fly-in: Visitors using air transport to enter Sydney

Leisure: Visitors who have travelled to Sydney for holiday purposes or to visit friends or relatives.

The primary objective of the research was to provide an understanding of the dispersal of these visitors from Sydney into regional areas of New South Wales (NSW) and to identify strategies that will encourage dispersal in the future.

The project sought answers to the following questions:

- What is the visitor profile of current fly-in leisure visitors to Sydney who disperse into regional NSW?
- What opportunities are there to promote regional NSW to Sydney visitors?
- What are the motivations of visitors who disperse and spend additional nights in regional NSW destinations?
- What role can the visiting friends and relatives (VFR) market play in driving visitor dispersal to regional NSW?
- What are the transport, access and planning issues preventing regional dispersal?
- What are the additional barriers discouraging visitors from going to regional NSW?
- What are the booking/planning processes of visitors to Sydney? At what stage and by what medium should they be contacted – before they leave home or once they arrive in Sydney?
- What role can packages play in encouraging visitor dispersal?

Research approach

The project was conducted in three stages:

- Desk research—the International Visitor Survey (IVS) and the National Visitor Survey (NVS) were reviewed to provide a market overview of the Sydney fly-in leisure market, including domestic visitors and the four key international markets of China, New Zealand (NZ), the United Kingdom (UK) and the United States (US) and their dispersal behaviour.



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- Qualitative research—including focus groups with domestic visitors and hosts and in-depth interviews with international visitors to further explore the concepts and ideas distilled from stage one and to better understand the motivators and barriers to visiting regional NSW. Insights from this stage were used in the quantitative survey design.
- Quantitative research—via an online questionnaire to test, measure and prove/disprove concepts from stages one and two, and to test potential products and strategies for encouraging NSW residents to accompany their guests to regional NSW.

Summary of key findings¹

Visitor demand

International

- Over the year to June 2011, there were 1.8 million international fly-in leisure visitors to Sydney.
- Of these visitors, 299,000 (17%) stayed overnight in one or more regions outside of Sydney.
- On average, they spent 11.8 nights and a total of 3.5 million nights in regional NSW.

Domestic

- Over the three year period from the year ending June 2009 to the year ending June 2011, there was an average of 1.4 million domestic fly-in leisure visitors per year to Sydney.
- Of these visitors, 81,000 (6%) stayed overnight in one or more regions outside of Sydney.
- On average, they spent 3.1 nights and a total of 252,000 nights in regional NSW.

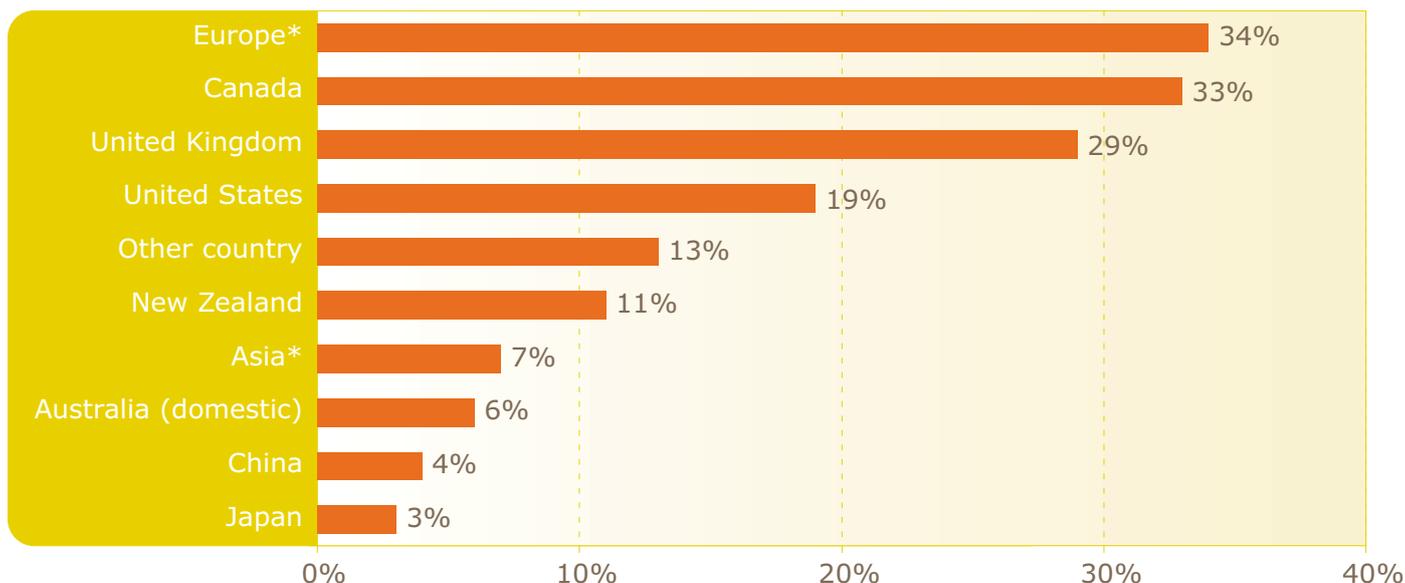
Visitor dispersal

International

Origin

Regional dispersal was most likely for visitors from Europe (excluding the UK) (34%), Canada (33%), the UK (29%) and the US (19%) (Figure 1). The level of dispersal was generally poor for visitors from Asian markets (China 4%; Japan 3%; Asia—excluding Japan and China—7%).

Figure 1 Incidence of dispersal from Sydney to regional NSW by origin market



* NOTE:

'Europe' excludes visitors from the UK; 'Asia' excludes visitors from Japan and China.

Source: TRA 2011

Domestic visitor estimates are a yearly average over a 3-year base period – years ending June 2009 to June 2011; International visitor estimates are for year ending June 2011.

¹ Statistics presented in this summary are sourced from the IVS, the NVS and the online survey of domestic and international fly-in leisure purpose visitors to Sydney conducted for this project. Statistics are derived from TRA sources unless otherwise stated.

The greatest volume of dispersers came from Europe (excluding the UK) (95,000), the UK (72,000) and Australia (81,000). The greatest volume of nights in regional areas was associated with visitors from Europe (excluding the UK) (1.1 million), the UK (846,000) and Asia (excluding Japan and China) (539,000).

Length of stay

Not surprisingly, there was a strong relationship between length of stay in NSW and the likelihood of dispersal. The proportion of international visitors dispersing increased as their length of stay in NSW increased (33% of those staying 15 nights or more dispersed compared to 1% of those staying 1 or 2 nights). Similarly, domestic visitors were more likely to disperse if they were staying 15 nights or more (23% compared to shorter stays).

The results of the online survey also demonstrated that international visitors that dispersed were more likely to be travelling within Australia for longer periods (30 nights compared with 10 nights for those that did not disperse).

Repeat visitation

The level of repeat visitation either to Australia or Sydney had no apparent influence on dispersal.

Purpose of visit

In terms of international visitors' purpose of visit, the incidence of dispersal was greatest for education visitors (23%) – although the number of these visitors was low (12,000)². This is not surprising, given education visitors travel for longer periods than other types of visitors. The incidence of dispersal for holiday and VFR visitors was similar (17% and 15% respectively) as it was for domestic travellers (5% and 6% respectively).

Visitor profile

International visitors were more likely to disperse if aged less than 30 years of age (23% dispersed) or were classified as backpackers (38% dispersed), and they were less likely to disperse if travelling with a tour group (4% dispersed).

Activities undertaken

International dispersers were also more likely to engage in a range of activities. The top ten activities where there was a significant difference between dispersers and non-dispersers were:

- Go to the beach (85% of dispersers participated in this activity)
- Visit national/state parks (68%)
- Visit pubs, clubs, discos (63%)
- Bushwalking/rainforest walks (53%)
- Snorkelling (31%)
- Surfing (21%)
- Experience Aboriginal art/craft and cultural displays (22%)
- Go whale or dolphin watching (20%)
- Visit the outback (20%)
- Visit an Aboriginal site/community (12%).

² The IVS analysis is based on those where the purpose of visit to Sydney was leisure. There is a larger group of international visitors where the purpose of visit to Sydney is education who would also be likely to disperse.

Domestic

Origin

The level of dispersal was generally poor for domestic (6%) visitors. Domestic visitors from the Northern Territory were more likely to disperse (25%) than visitors from other states/territories.

Regional NSW destinations

Dispersers were most likely to stay overnight in the Northern Rivers (106,000 visitors), followed by Mid North Coast (91,000), the South Coast (77,000), the Hunter (73,000) and the Blue Mountains (56,000) (Figure 2).

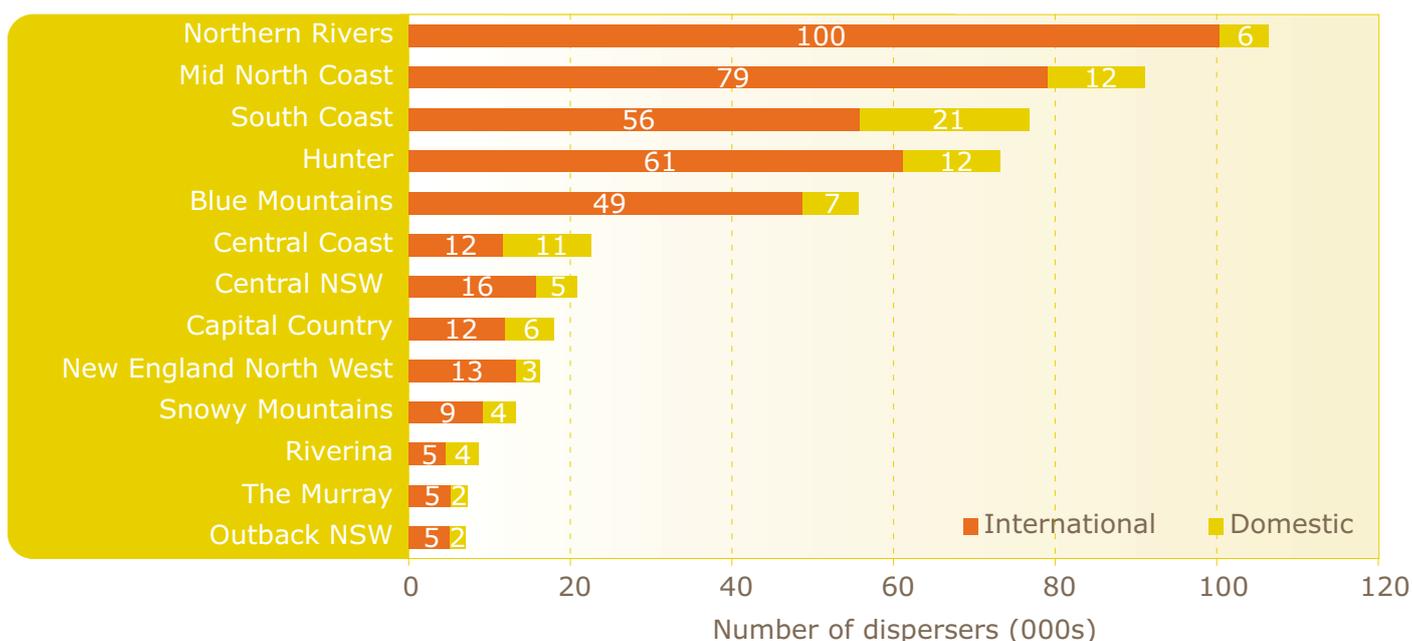
Activities undertaken

Domestic visitors who dispersed were significantly more likely to 'visit friends and relatives' (86%) as an activity and 'visit national parks or state parks' (15%).

The top five activities for domestic dispersers were:

- Visit friends and relatives (86% of dispersers participated in this activity)
- Eat out at a restaurant (78%)
- General sightseeing (52%)
- Leisure shopping (48%)
- Go to the beach (32%).

Figure 2 NSW regions visited by international and domestic dispersers



Source: TRA 2011

Domestic visitor estimates are a yearly average over a 3-year base period – years ending June 2009 to June 2011; International visitor estimates are for year ending June 2011.

Dispersal motivations

Leisure travellers are motivated by a range of factors including re-connection with friends and relatives, socialising, status and social approval, discovery (exploration and learning), adventure (more challenging – activity focus), relaxation, indulgence and sensory stimulation.

Visiting friends and relatives (VFR) was an important factor in dispersal with 37% of the online survey respondents who dispersed identifying this as a reason for visiting regional areas of NSW. The role of VFR is discussed further in the following sections.

Based on the activities sought by visitors and other insights derived from the research, the following summarises the motivational profiles of visitors from each of the key source markets.

New Zealand

Given the close and open nature of the relationship between Australia and New Zealand, this market has similarities with the Australian domestic market. There was a lower incidence of dispersal for these visitors (11% compared with 17% for all international visitors) and a higher proportion of VFR (44%) although as previously noted the incidence of dispersal was similar for VFR and holiday visitors. The incidence of dispersal on the basis of main reason for travel was similar, however, for holiday and VFR purpose visitors (12% and 10% respectively).

Also similar to domestic visitors, the incidence of dispersal increased with age; rising from 6% for those aged 15–29 years to 21% for those aged 70 or more. Length of stay in NSW was also a factor with 19% of those staying 8–14 nights dispersing and 17% of those staying 15 or more nights (compared with 11% overall).

Visitors from NZ were more likely to be interested in catching up with family and friends (51% very interested) and a relaxing food and wine experience (42% very interested).

Activities that were engaged in more frequently by dispersers were 'visit national/state parks' (34% compared with 17% of those that did not disperse), 'bushwalking/rainforest walks' (23% compared with 9%), 'visit art/craft workshop/studios' (11% compared with 4%) and 'visit wineries' (9% compared with 3%). These results suggest that sightseeing and soft adventure, and to a lesser extent relaxation and indulgence, are drivers of dispersal. Online survey respondents who dispersed were most likely to identify the following reasons for visiting places outside Sydney:

- spend time with family or friends who live outside Sydney (50%)
- to experience a relaxed environment (30%)
- recommended by friends or relatives who live in Sydney (25%)
- attending an event with friends and family (25%).

Nine per cent of NZ non-dispersers surveyed online would be very likely to consider visiting other areas of NSW if there were more travel packages available.

United Kingdom

Visitors from the UK were more likely to disperse (29% compared with 17% for all international visitors). A significant proportion of visitors from the UK were visiting friends and relatives in Australia (35%). The incidence of dispersal on the basis of main reason for travel was similar, however, for holiday and VFR purpose visitors (30% and 26% respectively).

Dispersal was related to age with younger visitors more likely to disperse (37% of those aged 15–29 years dispersed, compared with 22% of those aged 60 or more). Those staying for more than one week in NSW were also more likely to disperse (41% of those staying 8–14 nights and 51% of those staying 15 or more nights, compared with 29% overall).

The UK market includes a significant component of backpackers (25%). The backpacker market is generally motivated by discovery, adventure and opportunities to socialise. They have more time available and are able to make decisions about their itinerary as they travel. They are very social and word-of-mouth and personal recommendation can drive travel planning.

Visitors from the UK surveyed online were more interested in catching up with relatives and friends (48% very interested), a nature-based tour (44% very interested) and a relaxing food and wine experience (44% very interested). Online survey respondents aged 40 or more years were more interested in nature-based activities, socialising, enjoying food, wine and markets.

Online survey respondents who dispersed were most likely to identify the following reasons for visiting places outside Sydney:

- spend time with family or friends who live outside Sydney (47%)
- recommended by friends or relatives who live in Sydney (40%)
- to see somewhere new (40%).

Seventeen per cent of the UK non-dispersers would be very likely to consider visiting other areas of NSW if there were more travel packages available.

United States

Around one-fifth of US visitors (19%) dispersed into regional NSW—similar to international visitors generally (17%)—and they were less likely to be visiting friends and relatives (25%). Nearly one third (29%) were aged less than 30 years of age although only one-fifth (18%) were backpackers.

Younger visitors were somewhat more likely to disperse with 26% of those aged 15–29 years dispersing compared with 19% overall. Length of stay was also related to dispersal with 39% of those staying for more than one week in NSW staying overnight in regional areas of the state (compared with 19% overall).

Motivation for visitors from the US was closer to the 'discoverer' visitor profile identified by this project, which includes visitors who are interested in the special and unique aspects of Australia. Consequently, 'discoverer' visitors seek experiences that involve nature, Aboriginal culture and outback touring. They may undertake these experiences in NSW or elsewhere in Australia.

Visitors were more likely to be interested in a beach holiday (51% very interested), a nature-based tour (51% very interested), 4WD outback touring (42% very interested) and an Aboriginal discovery tour (42% very interested).

US dispersers were more likely to 'go to the beach' (85% compared with 66% of those that did not disperse), 'bushwalking/rainforest walks' (46% compared with 34%), 'surfing' (17% compared with 4%) and 'go whale or dolphin watching' (13% compared with 5%). Their motivation to disperse includes a soft adventure/activity focus. Consistent with a 'discoverer' profile, online survey respondents from the US were more likely to identify the following reasons for visiting places outside Sydney:

- to see somewhere new (38%)
- to have a unique experience (29%)
- to see open spaces (29%).

One-quarter (25%) of the US non-dispersers would be very likely to consider visiting other areas of NSW if there were more travel packages available.

China

Visitors from China were limited dispersers (4%) and less discretionary as they were travelling with a tour group in the majority of cases (54%).

There was no clear relationship between the visitor's age and the likelihood of dispersal. Those staying for more than one week in NSW were, however, more likely to disperse (6% for those staying 8–14 nights and 13% for those staying 15 or more nights, compared with 1% for those staying 1–7 nights).

Online survey respondents from China were more likely to specify 'to have a beach holiday' (56%), 'to see somewhere new' (38%) and 'to have a unique experience' (38%) as reasons for visiting places outside Sydney.

Activities that were more frequently cited by Chinese dispersers were:

- pubs, clubs, discos (28% compared with 12% of those that did not disperse)
- go whale or dolphin watching (24% compared with 11%)
- attend theatre, concerts, other performing arts (21% compared with 6%)
- attend festivals, fairs, or cultural events (18% compared with 4%)
- visit the outback (16% compared with 4%).

The reasons given by the online survey respondents for visiting places outside Sydney were: 'to have a beach holiday' (56%), 'to see somewhere new' (38%) and 'to experience a relaxed environment' (38%).

The dispersal of packaged tour group travellers is largely controlled by the tour operators that determine the itinerary. In addition to packaged tour groups, there are independent Chinese travellers who in many instances are education purpose visitors and their associated relatives and friends. These visitors are more flexible and they are less constrained. While from a small base, Chinese education³ visitors were more likely to disperse (16% compared with 4% for all Chinese). They are interested in discovery, and product in this context is more likely to be iconic nature and Australian animals, museums and galleries.

³ Education purpose of visit to Australia – the sample base for the analysis is leisure purpose visitors to Sydney.

A second part of the China market that has greater flexibility in its travel plans consists of the relatives of students visiting from China. These visitors are more independent and more likely to have the time and capacity to disperse.

Domestic

The domestic market is associated with low levels of dispersal (6%). The majority of domestic visitors who dispersed (53%) were visiting friends and relatives and '*visiting friends and relatives*' was cited as an activity by 86% of dispersers (compared with 66% of those that did not disperse). When compared on the basis of main reason for travel, however, there was little difference in the incidence of dispersal for holiday and VFR purpose visitors (5% and 6% respectively).

Older visitors were somewhat more likely to disperse (6% for those aged 15–29 years and 4% for those aged 30–49 years, rising to 8% for those aged 60–69 years and 9% for those aged 70 or more years). Those staying more than 7 nights in NSW were also more likely to disperse (22% for those staying 8–14 nights and 23% for those staying 15 or more nights compared with 6% overall).

The experiences that the domestic online survey respondents who dispersed were most interested in were: catching up or socialising with family or friends—53% very interested; lunch on a pub veranda/wine tasting/farmers markets—47% very interested.

Domestic dispersers were also more likely to visit national and state parks suggesting that sightseeing and soft adventure may also encourage dispersal for this group. Online survey respondents who dispersed were most likely to identify the following reasons for visiting places outside Sydney:

- spend time with family or friends who live outside Sydney (36%)
- to see somewhere new (28%)
- recommended by friends or relatives who live in Sydney (24%)
- to experience a relaxed environment (24%)

Nine per cent of domestic non-dispersers surveyed online would be very likely to consider visiting other areas of NSW if there were more travel packages available.

Role of friends and relatives in stimulating dispersal

Friends and relatives play a multifaceted role. They may travel with their guests, provide information on regional experiences, source and book accommodation and activities and personally recommend experiences. Friends and relatives are involved in planning both prior to the visit and during the visit. For many visitors, input from friends and relatives improves the quality of their visit.

A significant proportion of the fly-in leisure visitors to Sydney were visiting friends and relatives, however, the extent to which visitors were travelling to visit friends and relatives varied substantially for the different markets. The proportion of VFR visitors by market was highest for domestic visitors (53%), followed by NZ (44%), the UK (35%), the US (25%) and China (18%).

When online survey respondents who had dispersed were asked why they had visited places in NSW outside Sydney, the reason most commonly given was '*I wanted to spend time with my friends and family who live outside Sydney*' (37%).

There was no difference in the propensity to disperse for international and domestic visitors on the basis of purpose of visit. Domestic dispersers did, however, identify '*visiting friends and relatives*' as an activity in a larger proportion of cases (86% compared with 66% of those that did not disperse). The online survey found, however, that international VFR purpose visitors were more likely to disperse (51% compared with 35%) than international visitors travelling for other purposes. There was no difference for domestic visitors. The online survey also found that international visitors that dispersed spent more time with friends and relatives in Sydney⁴.

There is considerable interaction between visitors to Sydney and their friends and relatives. More than half (54%) of the online survey dispersers who had visited friends or relatives were accompanied by friends or relatives when they travelled outside of Sydney (49% for domestic and 63% for international). Local residents, therefore, represent a channel to influence travel behaviour of visitors.

⁴ The online survey used a convenience sampling procedure and is not necessarily representative of the broader population of travellers (unlike the IVS/NVS which are probability based surveys).

Dispersal barriers

For the online survey respondents, the major barriers to dispersal were a lack of time (57%) and that the visitor was in Sydney for a specific reason and wasn't in a position to consider visiting regional areas of NSW (51%).

Access may also represent a barrier for dispersal for some visitors, with 26% of the online survey respondents disagreeing with the statement 'driving is easy and simple' and 17% disagreeing that '*there is good public transport*'. More than 20% of the online survey respondents rated travel to regional NSW by train, coach or air as '*hard*' or '*very hard*'.

The research did not suggest that the respondents held negative images or attitudes regarding regional NSW⁵.

The majority of online survey respondents agreed there were things to see and do in regional NSW, that information was available, and that there were many tours and packages available. Over one-quarter (26%) disagreed that '*I already have a good understanding of things to see and do*'.

These findings suggest that the major difficulty is that for many visitors, regional NSW either does not come to mind or that awareness is low to begin with. The issue is one of salience as opposed to destination image⁶.

Melbourne focus group participants contrasted the relationship between Melbourne and regional areas of Victoria with Sydney and regional areas of NSW:

'But then when you think of New South Wales it's very Sydney centric'.

*'See in Melbourne I would go further out but in Sydney I don't even think about it. I get to Sydney and that's it'.*⁷

Regional dispersal may be inhibited to some extent by the strength of Sydney as a destination brand and perhaps a reliance on Sydney in the past as the focus of marketing communication for NSW.

Influencing dispersal during planning and booking

Online survey respondents (both international and domestic visitors) had generally planned most or all of their activities prior to arrival in Sydney (53% including those travelling with a tour group). In most cases, visitors will have established a general itinerary of where they want to visit prior to arrival. For those travelling with a tour group—which included 54% of the Chinese respondents—the itinerary is determined by the tour operator.

With the exception of long staying backpacker and education visitors there is less chance of influencing the visitor's itinerary of overnight stays following their arrival in Sydney.

There is, however, greater scope to influence the activities for those staying in Sydney following their arrival and to influence dispersal into regional areas for day trips.

While it may be that visitors can be influenced while in Sydney to consider visiting regional areas on return visits, there was no evidence from the online survey that repeat visitation is a driver of regional dispersal.

The online survey respondents most frequently used '*friends and relatives who live in Sydney*' (64%), '*Google search*' (53%), '*previous visit*' (45%) and '*official government and tourism websites*' (45%) for information.

International visitors were more likely to use '*travel books, guides or brochures*' (41%) as information sources. Domestic visitors were more likely to use '*previous visits*' (54%); '*friends/relatives in other parts of NSW*' (46%); '*social media*' (31%); and '*online travel agents*' (20%).

The key sources used prior to visiting were '*Google search*' (27%), '*official government and tourism websites*' (26%), '*other websites*' (19%), '*testimonial websites*' (19%) and '*previous visits*' (18%).

Information sources more commonly used during the visit were those that are local to the destination. These included '*friends and relatives who live in Sydney*' (25%), '*visitor information centres*' (15%) and '*hotel concierge desks*' (15%).

⁵ The exception was Newcastle with qualitative research participants surprised by the beauty of the area which they may have otherwise perceived as an industrial region.

⁶ Trembath, 2008.

⁷ Although it would be expected that Melbourne residents will have a greater awareness of regional Victoria.

Just over half of visitors searched online for 'things to do' while on their visit and this was mostly by mobile phone internet access. It is important to ensure that websites work on a small screen or have a 'mobile version' that will display correctly. Current use of Apps and social media for planning is much lower than websites.

Booking channels most commonly used by the online survey respondents were 'direct with operator by website or email' (36%), 'other booking website' (26%) and 'direct with operator by phone' (23%).

Role of package travel

Packaging, including the provision of day tours, provides a mechanism for encouraging dispersal. Fly-in leisure visitors may be constrained by transport and time and the availability of packages reduces the level of complexity associated with travel planning.

One focus group participant felt that Melbourne offered more distribution options in this regard:

'I'd say that Melbourne's got a lot more organised bus tours out to the wineries, the penguins, Great Ocean Road'.

Of the international visitors surveyed online, 12% stated that their travel to Sydney was fully packaged, and 10% stated that part of their travel was packaged. For domestic visitors, 7% were fully packaged and 9% were partially packaged.

For those dispersing to other areas of NSW, 6% of international visitors stated that their travel was fully packaged and for 10% it was partially packaged. For 4% of domestic dispersers their regional travel was fully packaged while it was partially packaged for 15% of domestic dispersers.

Chinese visitors were more likely to purchase packaged travel – 55% were fully or partially packaged into Sydney and 46% fully or partially packaged into other areas of NSW.

When the non-dispersers were asked whether they would be likely to consider visiting regional areas of NSW if more packages were available, more than half (58%) stated they would be very likely or likely compared to one-third (33%) unlikely or very unlikely.

When presented with a range of packages and asked to state their level of interest in each, the package that was most appealing was a 'great priced airfare that included a two night stay in a mountain or beach resort outside Sydney' (80% interested or very interested). This was followed by 'an invitation from friends or relatives who live in Sydney to come and stay with them and also tour around with them to areas outside Sydney either for a day or overnight' (78% interested or very interested). This highlights visitors' need for short stays, as well as the role of friends and relatives in visitors' trip planning.

Packages involving overnight stays in regional areas of NSW will be attractive to fly-in leisure visitors to Sydney where:

- they are short stays (2 nights)
- the destination is close to Sydney
- they include all major expenses – transport and accommodation.

Packages were most likely to be booked via a retail travel agent or an online travel agent.

Conclusion

Importance of friends and relatives

Friends and relatives play an important role in encouraging visitors to disperse into regional NSW. They may travel with their guests, provide information on regional experiences, source and book accommodation and activities and personally recommend experiences. Friends and relatives are involved in planning both prior to the visit and during the visit.

Sydney residents can act as an important medium to influence the travel behaviour of their visitors, particularly international visitors. The research suggests that Sydney residents on many occasions will accompany their friends or relatives when they travel outside of Sydney.

Recommendation

Friends and relatives can influence the travel behaviour of VFR visitors if they themselves are aware of the destinations, experiences and things to see and do within a short distance from Sydney CBD. It is recommended that resources be developed to increase Sydney residents' knowledge of their state and ability to encourage their VFR visitors to disperse.

Importance of package travel

It is clear that the availability of packages plays an important role in encouraging visitors to disperse to regional NSW. The research suggests that if there were more travel packages available to regional NSW, visitors from each of the key markets investigated in this project would be very likely to consider visiting other areas of NSW outside of Sydney.

Packaging of regional areas of NSW is also crucial given that more than one-fifth of the online survey respondents rated travel to regional NSW by train, coach or air as 'hard' or 'very hard', and over one-quarter disagreed with the statement 'driving is easy and simple'. These fly-in leisure visitors to Sydney may be constrained by access to transport and be less interested in travelling independently.

Recommendation

Packaging provides a mechanism for conversion and it is recommended that product gaps are identified and travel packages from Sydney into regional NSW are developed collaboratively with industry partners.

Building awareness of regional NSW through destination branding

With the exception of longer staying education visitors and backpackers, visitors will generally make decisions regarding their itinerary prior to arrival in Sydney. The research suggests that the main barrier to regional dispersal, (apart from 'no time' and 'was in Sydney for a specific reason', which are contextual factors), was a lack of awareness. The research generally did not suggest constraints due to negative images of regional NSW.

Regional NSW did not come to mind when visitors were planning their visit. To some extent, the strength of Sydney as a destination brand may be overpowering the marketing messages for regional NSW. Building awareness of regional NSW can be an objective through the full range of marketing activities including traditional mass media, direct marketing, social media, other digital resources and public relations.

A significant proportion of the online survey respondents that dispersed were visiting friends and relatives in regional NSW. VFR represents an important pull factor and should be incorporated into the branding for regional NSW in addition to other pull factors discussed for each of the key markets.

Recommendation

Opportunities may exist to build awareness of regional NSW by linking tourism product in regional NSW to the evidently strong Sydney brand, and incorporating VFR messages into the branding for regional NSW.

Reaching visitors through marketing and promotion

Decisions regarding dispersal will be made by visitors following their arrival in Sydney – particularly with respect to daily activities. Visitor information centres in Sydney, hotel concierge desks and other distribution outlets for brochures and printed material should be a component of the dispersal strategy.

Digital resources will also play a role in dispersal and official government and tourism websites and online travel agents should include information and booking mechanisms to facilitate dispersal. Social media should also be used as a component of a dispersal strategy to raise awareness and stimulate interest through advocacy.

Given many visitors use their mobile phones to access the internet while travelling, it is important to ensure that the industry is actively engaged in mobile digital marketing. While the current use of Apps and social media for trip planning is much lower than use of traditional websites, this is a rapidly growing marketing channel that operators should continue to be encouraged to take up.

Key markets

The following recommendations are made for each of the key markets investigated:

Domestic

The dispersal strategy for the domestic market should rely on building awareness of regional attractions in NSW – particularly those within a 3-hour drive of Sydney; and the development of appropriate packages.

New Zealand

The dispersal strategy for the NZ market is similar to the domestic strategy with marketing communication to raise awareness of regional attractions prior to arrival, and appropriate product development focusing on food/wine/markets. A VFR strategy should address the needs of NZ visitors where appropriate.

United Kingdom

The dispersal strategy for the UK incorporates social media and branded touring routes aimed at the backpacker market. It should also incorporate 'discoverer' product featuring nature-based and natural experiences. A VFR strategy should address the needs of UK visitors where appropriate.

United States

The dispersal strategy for visitors from the US is focused on raising awareness of experiences in NSW that are consistent with the 'discoverer' profile – nature-based, Aboriginal culture and outback touring. Product information should be distributed via Tourism Australia's 'Aussie Specialist' program (a global online training program for retail travel agents) and other distribution channels to ensure that visitors have the opportunity to consider regional NSW prior to arrival.

China

Product development for the packaged Chinese market should be conducted in association with tour operators that control this market. Where the time is limited, product opportunities may include day trips to nearby regions including the Central Coast, South Coast, Blue Mountains and the Hunter.

It is also recommended that the dispersal strategy for the Chinese market includes communication with Chinese students in Australia regarding travel opportunities in regional NSW, possibly facilitated through educational institutions. There may be opportunities to develop packages through university graduation ceremonies and alumni groups, as relatives will often visit Australia at this time.

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Acknowledgements

This summary is extracted from research undertaken by TRA, Destination NSW and the NSW Department of Trade and Investment, Regional Infrastructure and Services. The report was prepared by Greenhill Research and Planning, based on the research design and primary data collection undertaken by StollzNow Research and Insights Advisory.

For the full Strategic Research Report please email tourism.research@ret.gov.au.

Contributors

TRA: Kathryn Gillies

Destination NSW and the NSW Department of Trade and Investment, Regional Infrastructure and Services:
Olivia Jenkins and Ruth Morris

Editing, design and production

TRA: Darlene Silec

Whalen Image Solutions

Tourism Research Australia

Department of Resources, Energy and Tourism

GPO Box 1564

Canberra ACT 2601

Email: tourism.research@ret.gov.au

Web: www.ret.gov.au/tra

ABN: 46 252 861 927

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Publication date: November 2012



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