



How do we deliver value to all of our customers?

Destination Management sets the foundation for our value chain.



Destination Management is at the heart of NSW's 2020 vision – and it's at the core of how we establish our priorities.



SHIFTING OUR PERSPECTIVE



Shifting our perspective means understanding how each of our service offerings fit into the value chain.

New perspective...



INLAND NSW CONSUMER RESEARCH – NENW RESULTS



Photo: Experience the Heights Facebook, Walcha

MyTravelResearch.com

Methodology

- ❖ Desk research analysis
- ❖ "Omni" study
 - Sent to 1,000 people
 - Let us know from a list of LGAs and towns which ones consumers knew
- ❖ Online quantitative study with 2,000 respondents
 - Who have taken a domestic holiday in past 12 months or intend to in next 12 months, 15 minute questionnaire, 3 open-ended questions
 - n = 1,000 NSW residents (750 metro, 250 regional)
 - n = 300 Qld residents (200 metro, 100 regional)
 - n = 300 Victoria residents (200 metro, 100 regional)
 - n = 400 rest of Australia (300 metro, 100 regional) – soft quotas set to obtain a mix
 - Weighted to be nationally representative of population in terms of age and sex
- ❖ Qualitative study - Online bulletin board
 - 20 participants
 - Run over 1 week
 - Mix of visitors and non visitors to the region
 - Segmented by age so both older and younger travellers included
 - NSW residents

MyTravelResearch.com



KEY FINDINGS & RECOMMENDATIONS

MyTravelResearch.com

12 take outs for Inland

- 1** Travellers from within regional NSW are not only more knowledgeable about Inland they are among the most frequent travellers
- 2** Frequent overseas travellers are also amongst the most frequent NSW Regional travellers
- 3** On average, domestic holidays last around 5-9 days, but some differences by segments. Older, moderate income and NSW regional travellers take the longest holidays
- 4** Relaxation and unwinding a key motivator of domestic travel
But aspiration and novelty are sought as well
- 5** Fear and safety concerns are less important in switching from overseas to domestic holidays than hassle

MyTravelResearch.com

12 take outs for Inland

- 6** Infrastructure and product are important – but so is being part of a region where there will be enough to do
- 7** Nature, food and history are key
- 8** Search and a good website are critical for inspiration and conversion
- 9** Still a role for VICs in destination
- 10** Some clear winners in terms of brand presence and strength – identifying our destination hubs

MyTravelResearch.com

12 take outs for Inland

- 11** A few niche or 'magnet' towns emerged strongly – mostly in Outback
- 12** Strong need to build understanding of region, especially around nature, food and wine and access issues

MyTravelResearch.com