



Destination Visitor Survey Strategic Regional Research – New South Wales

Consumer perceptions of the Snowy Mountains as a holiday destination

Introduction

The Snowy Mountains region is an area of outstanding scenery, with landscapes varying from ski fields and mountain lakes to farmland. A significant proportion of the region lies within the Kosciusko National Park making it an iconic Australian tourist destination and part of the Australian Alps National Landscape.

Tourism is a key contributor to the Snowy Mountains region, with visitors drawn to the region for snow sports during the winter and for activities such as bushwalking, fishing and mountain biking during the non-snow season months. However, visitation across the year is varied with visitor levels peaking in the snow season (mid-July and August) and dropping off significantly in the non-snow season months.

The seasonal nature of visitation to the Snowy Mountains has a number of implications on the region that currently prevent it from sustaining an economically viable tourism industry year round, including:

- maintaining a permanent labour force in the region
- attracting investment in tourism product and infrastructure
- improving transport access.

This study was undertaken by Tourism Research Australia (TRA) in partnership with Tourism New South Wales and Tourism Snowy Mountains to gain a better understanding of consumer perceptions of the Snowy Mountains region. This knowledge will enable Tourism New South Wales and Tourism Snowy Mountains to grow visitation levels year-round through informed decision-making, effectively increasing the year-round contribution of tourism to the local economy.

Research approach

The first phase of the research was to consult with local industry about the study: a series of in-depth interviews were conducted with key industry stakeholders and a further workshop took place with a broader industry group. The objective was to review the study focus with the local industry and to establish an understanding of the issues the local industry confronts. These sessions helped formulate the study's final approach and objectives.



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After the industry consultation, qualitative and quantitative phases were conducted with visitors and non-visitors in order to explore visitor motivations and attitudes, and to provide recommendations to assist with decision-making regarding the market. This involved nine focus groups and 1,200 online interviews; both of which were conducted with residents from:

- ACT
- Southern NSW
- Sydney
- Brisbane.

All survey participants had either visited the Snowy Mountains in the past two years; were planning to visit the Snowy Mountains in the next two years; or had an interest in at least one of the activities relevant to the region (skiing, hiking, fishing, touring etc).

Participant characteristics

- The majority (88%) of survey participants had taken a domestic trip in the past two years, and virtually all (91%) expected to take one in the next two years.
- *Escaping and freedom by getting close to nature; reconnecting with family and friends; rediscovering the real Australia; and activity-based holidays* were identified as important motivators for domestic travel.
- Over two-thirds (69%) of participants had visited the Snowy Mountains at some point; however, 70% of them were lapsed visitors who had not visited for at least five years. Lapsed visitors were more likely to be aged 35–54 years and to have last visited in winter.
- There was a core group of 'loyalist' visitors to the Snowy Mountains who visit frequently. They were more likely to live locally; visit in different seasons of the year; and undertake a range of activities.
- Just under two-thirds of visitors had visited only during the snow season (39%) or only during the non-snow season (24%). The remaining visitors (37%) had visited in both seasons.

Key findings

Awareness and perceptions

- The region performed relatively well on prompted awareness (90% of participants had heard of the region); however, it was not top-of-mind as a domestic tourism destination.
- The Snowy Mountains had strong associations with snow sports and the major ski resorts. However, while there was much higher awareness of *skiing* (88%) than other activities, only 38% cited an interest in it (in this report *skiing* refers to any type of skiing including snowboarding etc).
- Interest in activities such as *sampling local food and wine* and *touring small towns* was much higher, although awareness of the region's offering relating to these was relatively limited.
- In addition to the very strong associations of the region with *winter, snow sports* and *being cold*, there were positive perceptions relating to the *natural scenery* the region offers, and *opportunities to escape and get in touch with nature*.
- The combination of the region not being top-of-mind and limited knowledge act as barriers to consideration of the region as a holiday destination. The region was also perceived as *not offering good value for money* and *being expensive*.

Competitive set

- The region's main competitors with regard to skiing were identified as the Victorian snowfields, New Zealand and Japan. Of those who had skied in the past two years, just over half (52%) had only been to the Snowy Mountains (residents of Victoria were not included in the research).
- Compared to Queenstown (NZ), perceptions of the Snowy Mountains were lower for *value for money, having lots to do* and *year-round appeal*.

- Key summer competitors were considered to be coastal destinations along the NSW/Queensland coast.
- Year-round competitors most often mentioned by participants were Tasmania, other low cost carrier destinations and overseas destinations.

The travel decision-making process

- The gap between awareness (90%) and actual visitation levels (48% had visited in the past five years) was considerably larger for the Snowy Mountains than for a majority of competitor destinations.
- In addition, previous visitation (48%) was significantly higher than consideration (just 21% were considering a visit in the next three years). Based on intention to visit in the next two years, consideration was higher for the non-snow season (39%) than the snow season (33%).
- The internet was the main information source for participant's travel planning, with search engines (e.g. Google) and maps most commonly used. However, a more varied range of information sources, including TV programs and recommendations, were used to gain the initial inspiration for holiday destinations.
- With regard to the Snowy Mountains, participant feedback indicated that useful information on the internet was difficult to find and specific information was lacking on practical requirements, activities, availability and pricing.
- Feedback from participants on existing Snowy Mountains brochures was mixed. While the brochures were felt to raise awareness and provide useful information, there was a view that they could be more inspiring and less cluttered.
- Package offers appealed to many participants. Packages and example itineraries would also raise awareness of what was available, as well as helping visitors to budget.

The visitor experience

- Motivation for visiting during the snow season was largely centred on snow-specific factors, and visitation was concentrated in Thredbo and Perisher. During the non-snow season, dispersal to other areas was much higher.
- The non-snow season had a wider range of drivers for visitation, including *a wish to re-visit, to get away, and being part of a touring route*. Visitors in this season also participated in a broader range of activities.
- Around a third of visitors — in both the snow and non-snow seasons — indicated their experience in the Snowy Mountains had exceeded their expectations.

Lapsed visitors and those who had never visited the region

- Lapsed visitors tended to be older, with many looking for less active holidays. Another life stage group that commonly fell into this lapsed category was those with young children, or absent older children.
- Barriers identified by lapsed visitors and those who had never visited the region included *the region not being top-of-mind; perceptions that it was expensive; that it was cold; and not knowing much about the region*. In addition, many of those from the Sydney and Brisbane markets felt that the Snowy Mountains region was *too far away/hard to get to*.
- In the non-snow season, key barriers were *a lack of interest in the destination compared with other regions* – primarily fuelled by a low awareness of what it offered. There was also a perception that *it was cold* (even in the non-snow season) and *expensive*.
- Participants presented many ideas for increasing interest in the region, including providing more information on available activities, accommodation, practicalities and transport, and offering suitable packages.

Recommendations

The research identified four key issues for the Snowy Mountains region along with recommendations.

1. *Low awareness of what there is to do during the non-snow season, meaning that the Snowy Mountains region is not seen as a year-round destination.*
 - Develop clear positioning, including clear brand messages of the emotional benefits visitors will gain from a trip to the Snowy Mountains in the non-snow season (i.e. how it will make them feel – energised, in touch with nature, etc).
 - Raise awareness of the non-snow activities via cross-season marketing and public relations, highlighting the region's unique benefits such as Mount Kosciusko and develop tailored packages for target segments.
 - Work with local ambassadors/celebrities and specialist groups.
 - Make information on activities and practicalities easy to find.
2. *Poor perceptions regarding value for money.*
 - Highlight the range of activities available across all seasons.
 - Highlight the unique benefits of the region, such as slope-side accommodation.
 - Offer flexible tailored packages, with clear indications of what is/is not included. (Many participants mentioned their surprise at the unexpected additional cost of National Park fees.)
 - Combine ski area lift tickets to enhance perceptions of value during the snow season.
 - Offer incentives to save money by pre-booking items such as lift tickets/National Park fees.
3. *Perceptions that it is difficult to organise a trip to the region.*
 - Focus on search engine marketing and optimisation and ensure clear links from partner websites so information can be easily found online.
 - Ensure that the region's website is clear and easy to navigate.
 - Provide detailed, practical information on the climate, clothing requirements etc.
 - Provide online booking/live availability for accommodation to match consumer preferences and expectations.
4. *Perceptions that it is difficult to get to the region.*
 - Provide maps on how to get to and around the region, including information on journey times and potential road closures.
 - Provide guidance regarding snow chains.
 - Provide public transport options and details.
 - Provide itinerary ideas.
 - Partnering with roadside organisations could be beneficial.

This summary is extracted from research conducted by Tourism Research Australia and supported by Tourism New South Wales and Tourism Snowy Mountains. For the full Strategic Regional Research Report, please email tourism.research@ret.gov.au.

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Courtesy of Tourism New South Wales

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