



2019 NSW Accredited Visitor Information Centre Wi-Fi Availability survey

INTRODUCTION

The online survey of Wi-Fi availability in NSW Accredited Visitor Information Centre (AVIC) network was conducted 11 March through 24 March 2019 by Destination NSW. The survey provided the latest information about AVICs as well as the digital connectivity within their respective regions and the wider NSW AVIC network. Only one response was allowed per AVIC.

The survey was sent to all AVICs in NSW (141 in total). Of those, 98 (or 70%) responded to the survey whereas 57% percent completed the survey.

NOTES ABOUT THIS REPORT

Survey results are presented as charts or tables. In every chart, the following are shown: the number of respondents as indicated by "(n =)" and the question asked. Where response is "Other", the specific answers are shown, when available.

This report contains following sections:

- Information about AVICs
- AVIC Customers
- Services/ facilities provided by AVICs
- Wi-Fi Access
- Marketing and information
- Digital products
- Appendix

KEY HIGHLIGHTS

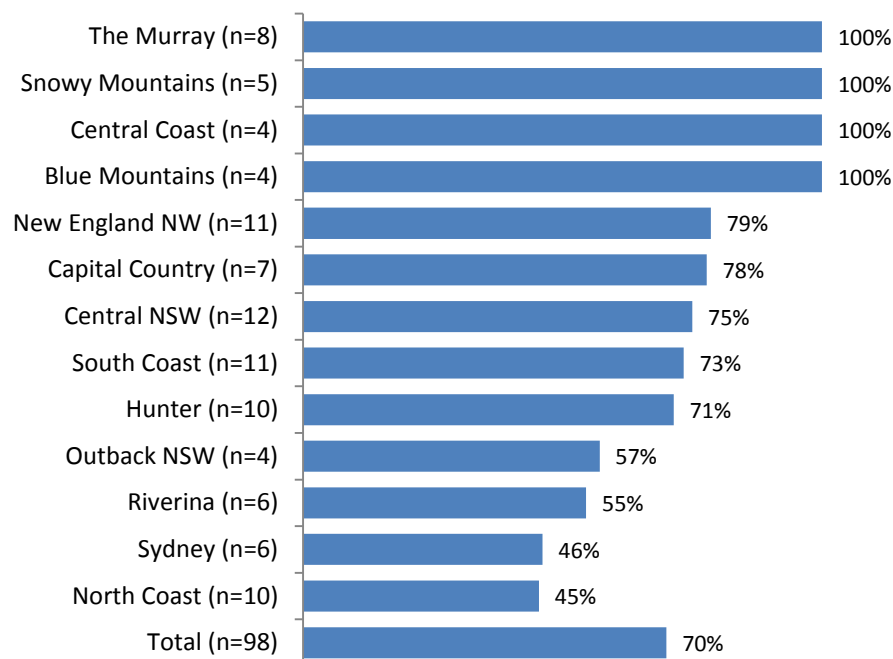
- Majority of AVIC customers to NSW were intrastate visitors (38 per cent), aged 55 and over (49 per cent) who were travelling as part of a couple (52 per cent).
- Almost three quarters (72.5 per cent) of all AVICs in NSW have provided free Wi-Fi services to their customers. Of these AVICs, nearly two thirds have no access limits, i.e. either download limit and/or time limit (63 per cent).
- Majority of towns (80 per cent) where the AVICs are located also provide Wi-Fi services, mostly in town libraries (91 per cent) and/or cafes and restaurants (80 per cent).
- 37 per cent do not collect any details from their customers while 38 per cent collect email addresses.
- Leaflets (66 per cent) and paid marketing (63 per cent) were the most common channels used for marketing or communication with their customers. All AVIC respondents use Facebook, followed by Instagram (78 per cent).
- Majority of AVICs (71 per cent) manage and maintain their own websites.
- Nearly three quarters (72.5 per cent) of AVICs upload their digital products via Australian Tourism Data Warehouse (ATDW).
- Over half of AVICs reference DNSW Hashtags (55 per cent) and DNSW websites (52 per cent each) in their social media channels or websites.



SURVEY RESPONSE RATES

All AVICs located in The Murray, Snowy Mountains, Central Coast and Blue Mountains tourism regions (TR) responded to the survey. North Coast and Sydney had the least proportion of AVICs that responded to the survey.

Figure 1: Survey response rates by Tourism region



Base: 2019 NSW AVIC Wi-Fi Availability (n=98)

Q3: In which town is your VIC located? / Q4: What is your home postcode? Merged with postcode / tourism region data

AVIC CUSTOMERS

Sydney TR (264,000) recorded the highest annual average number of visitors to its AVICs, followed by Blue Mountains TR (181,000) and Central NSW TR (137,518).

Table 1: Approximate annual number of customers to AVICs by Tourism region

	Blue Mountains	Capital Country	Central Coast	Central NSW	Hunter	New England NW	North Coast	Outback NSW	Riverina	Snowy Mountains	South Coast	Sydney	The Murray	Total
Average	181,000	21,729	33,125	137,518	26,680	33,991	40,333	37,125	15,208	24,750	33,273	264,000	12,000	60,061
Minimum	18,000	100	9,500	6,000	1,598	6,000	6,000	3,500	250	19,000	6,000	5,000	5,000	100
Median	53,000	15,000	36,500	55,000	12,000	19,000	27,000	25,000	12,000	25,000	35,000	20,000	11,000	20,000
Maximum	600,000	65,000	50,000	573,000	100,000	110,000	110,000	95,000	33,000	30,000	60,000	1,000,000	20,000	1,000,000
Sample	4	7	4	11	10	11	9	4	6	4	11	5	8	94

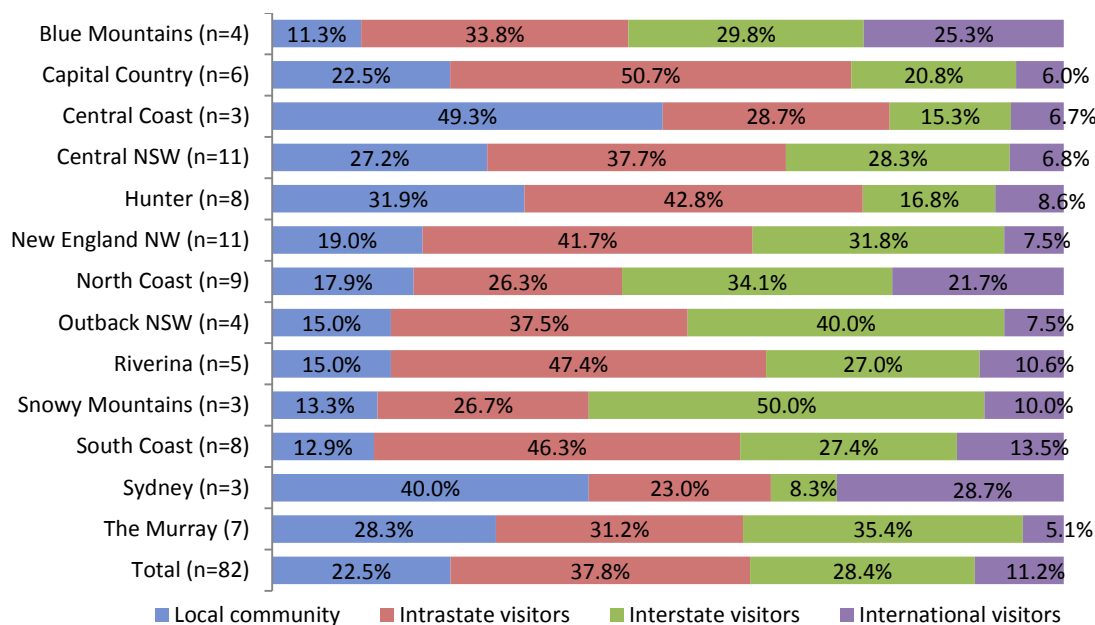
Base: 2019 NSW AVIC Wi-Fi Availability (n=98)

Q6: What is the approximate annual number of customers to your AVIC?



Central Coast TR (49.3 per cent) had the largest proportion of local visitors to its AVICs, Capital Country TR (51 per cent) had the largest proportion of intrastate visitors, Snowy Mountains TR (50 per cent) had the largest proportion of interstate visitors and Sydney TR (29 per cent) had the largest proportion of international visitors to its AVICs.

Figure 2: Approximate proportion of customers to TRs by ORIGIN

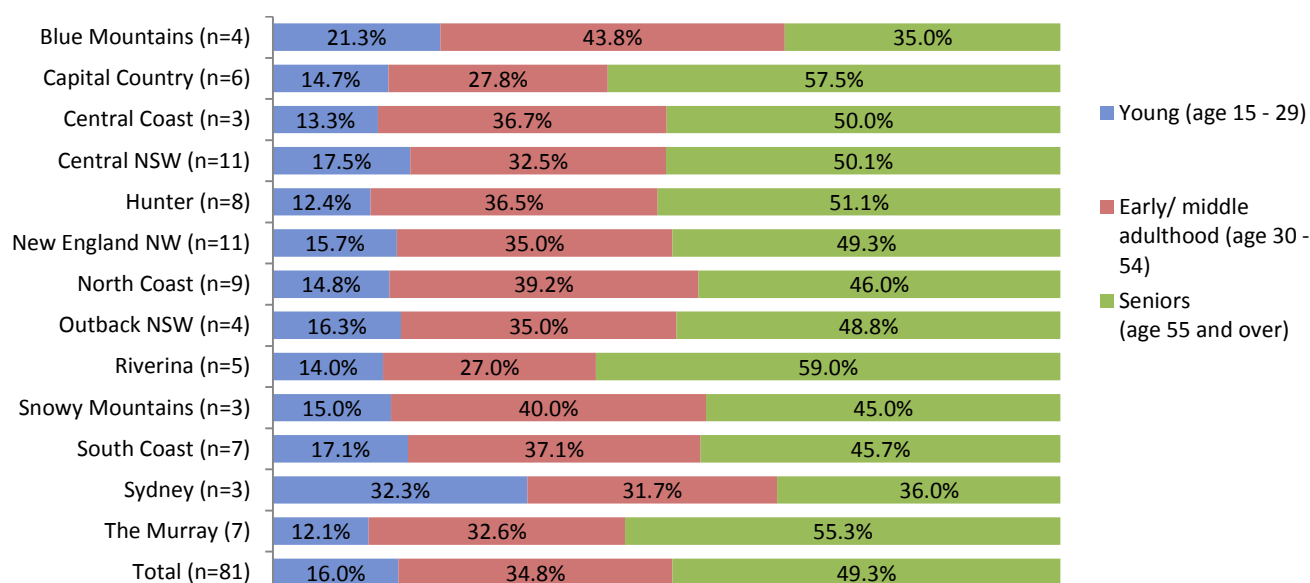


Base: 2019 NSW AVIC Wi-Fi Availability (n=82)

Q8. Please indicate the approximate proportion of your customers by ORIGIN.

Sydney TR (32 per cent) attracted the most of youth visitors to its AVICs, while Blue Mountains TR (44 per cent) had the largest proportion of visitors age 30 to 50 and Riverina TR (59 per cent) had the largest proportion of senior visitors to its AVIC.

Figure 3: Approximate proportion of customers to TRs by AGE



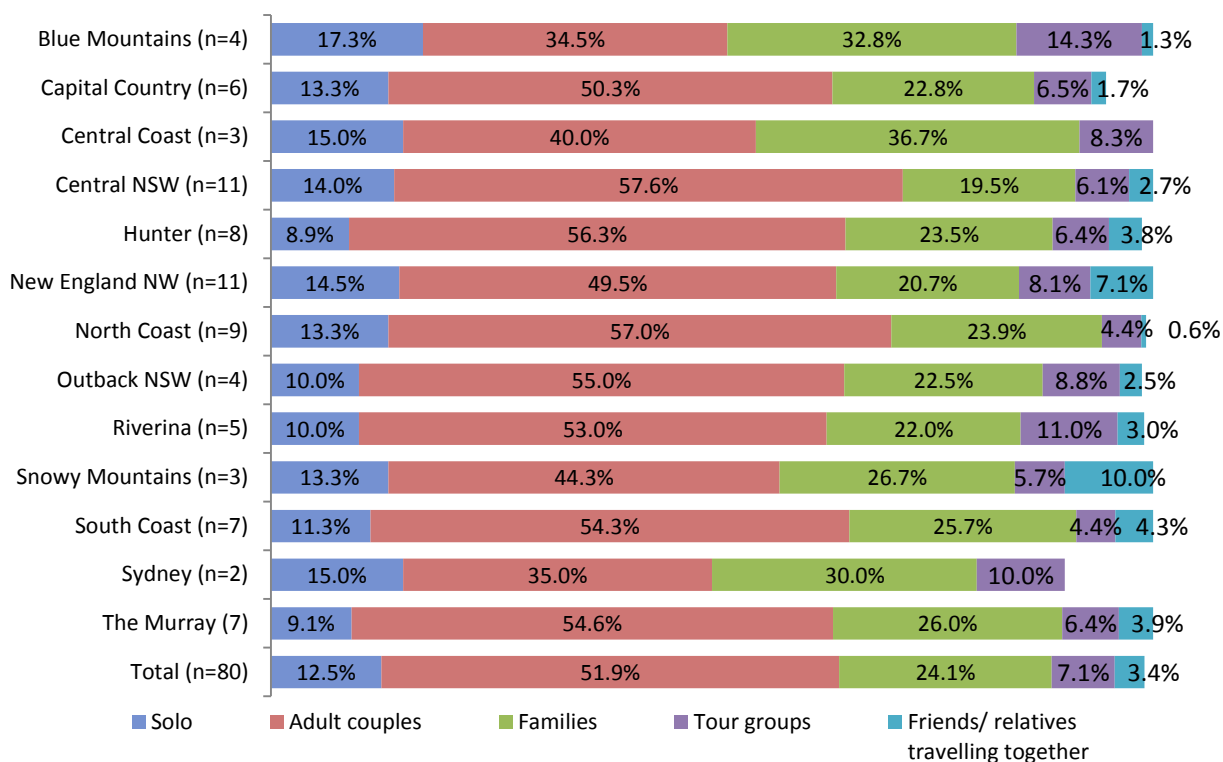
Base: 2019 NSW AVIC Wi-Fi Availability (n=81)

Q9. Please indicate the approximate proportion of your customers by AGE.

AVICs located in Blue Mountains TR attracted the largest proportion of solo visitors (17 per cent) and tour groups (14 per cent). AVICs in Central NSW TR had the largest proportion of adult couples (58 per cent),

Central Coast TR had the largest proportion of families (37 per cent) and Snowy Mountains TR (10 per cent) attracted most visitors who were part of a group of friends or family who travelled together.

Figure 4: Approximate proportion of customers to TRs by TRAVEL PARTY



Base: 2019 NSW AVIC Wi-Fi Availability (n=80)

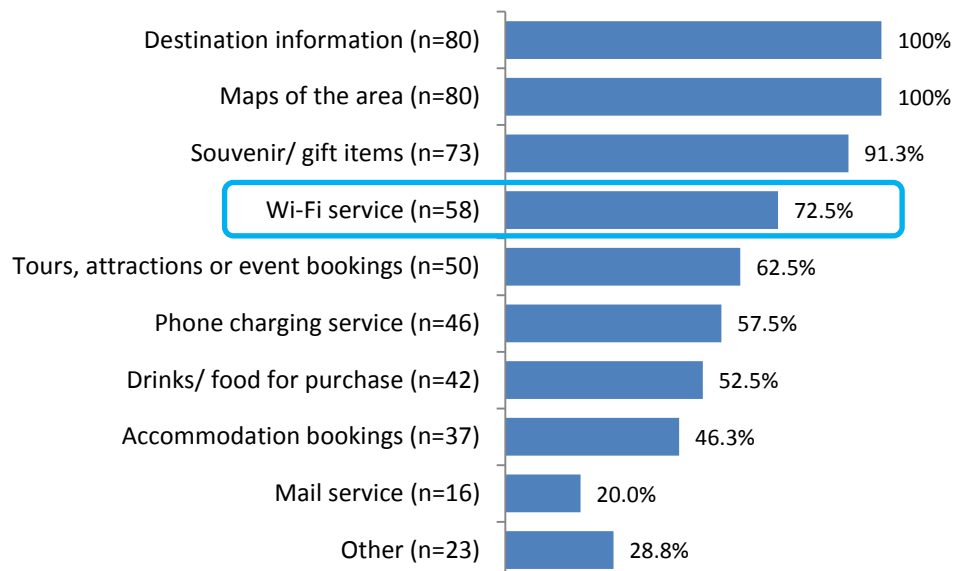
Q10. Please indicate the approximate proportion of your customers by TRAVEL PARTY.



SERVICES/ FACILITIES PROVIDED BY AVICs

“Destination information” and “Maps of the area” services were provided by all AVICs in NSW. “Souvenir/ gift items” was provided by 91 per cent of AVICs while 72.5 per cent provided Wi-Fi services to their customers.

Figure 5: Services provided by AVICs

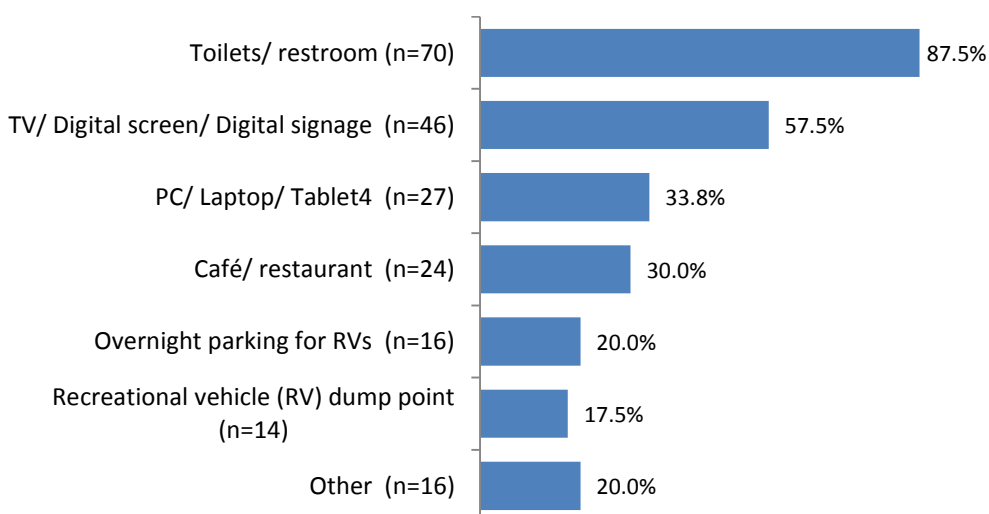


Base: 2019 NSW AVIC Wi-Fi Availability (n=80) - Multiple Response Question.

Q11. Which of the following services are provided by your AVIC? - see Appendix for a split by TRs

Majority of the AVICs (88 per cent) in NSW have “Toilets/ restroom” available to their customers and just over half (58 per cent) of the AVICs have “TV/ Digital screen/ Digital signage”.

Figure 6: Facilities available at AVICs



"Other" includes:
Water for caravan
Untimed RV parking zone
RV facilities nearby but not onsite
RV Dump point and O/N Parking in Council caravan park adjacent VIC
Museum
Dump point close by, potable water, plenty of parking
Dump point and o'nite RVs in town, not actually at VIC
Coming soon - EV charging station
Coffee machine, not cafe
BBQ, playground
All of the above highlighted within 100m of our front door but not actually at the VIC
None of the above AT our VIC however Toilets/ restroom and RV Parking are close by - 50m from VIC
No cafe onsite however there are two options within 50m of the VIC, bag storage

Base: 2019 NSW AVIC Wi-Fi Availability (n=80) - Multiple Response Question.

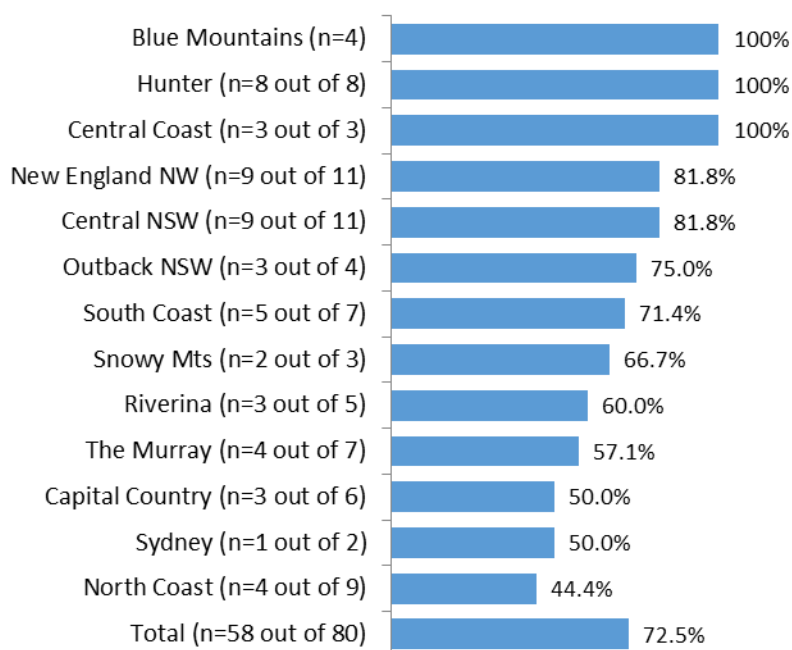
Q12. Which of the following facilities are available at your AVIC? - see Appendix for a split by TRs

Wi-Fi ACCESS in AVICS

Wi-Fi services were provided by all AVICs in the Hunter TR and Central Coast TR while the same services were provided by 82 percent of the AVICs in New England North West TR and Central NSW TR, each.

The chart below shows the number of AVICs that responded to the question, the number who provide Wi-Fi service and the resulting percentages.

Figure 7: Wi-Fi service by tourism regions



Base: 2019 NSW AVIC Wi-Fi Availability (n=80)

Q11. Which of the following services are provided by your AVIC? Respondents who selected "Wi-Fi service" in Q11 (n=58).

All AVICs provide free Wi-Fi services at their premises, apart from Tumbarumba AVIC.

None of those who do not provide Wi-Fi service answered the question on the reason for the non-provision of such service (i.e. budget, Wi-Fi infrastructure, technological capability).



AVICs in the following tourism regions do not have any access limits to their free Wi-Fi services: Central Coast, North Coast, Snowy Mountains, The Murray and Sydney.

Around 37 per cent have the access limits to their free Wi-Fi services, where on average, customers can download an average of up to 1,286 megabytes of content, and/or up to 61 minutes.

Figure 8: Access limit to the free Wi-Fi service in AVICs



Base: 2019 NSW AVIC Wi-Fi Availability (n=57)

Q14. Are there any access limits to the free Wi-Fi service at your AVIC?

Table 2: AVICs access limits by TR

Download limit (in megabytes) (n=7)	1,286
Time limit (in minutes) (n=17)	61

What are the limits applicable on Wi-Fi service at your AVIC?	Download limit (in megabytes)	Time limit (in minutes)
	Avarage	Avarage
Blue Mountains	100	50
Capital Country		90
Central NSW	5,000	30
Hunter	200	11
New England NW	1,250	150
Outback NSW	500	30
Riverina		60
South Coast	700	28
Total	1,286	61

Base: 2019 NSW AVIC Wi-Fi Availability (n=24)

Q15. What are the limits applicable on Wi-Fi service at your AVIC?- Download limit (in megabytes)/ Q16. What are the limits applicable on Wi-Fi service at your AVIC?- Time limit (in minutes).

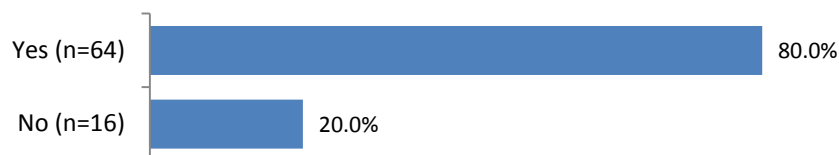


Wi-Fi ACCESS in TOWNS

Eighty percent of AVICs in NSW reported that there is a Wi-Fi access in their respective towns.

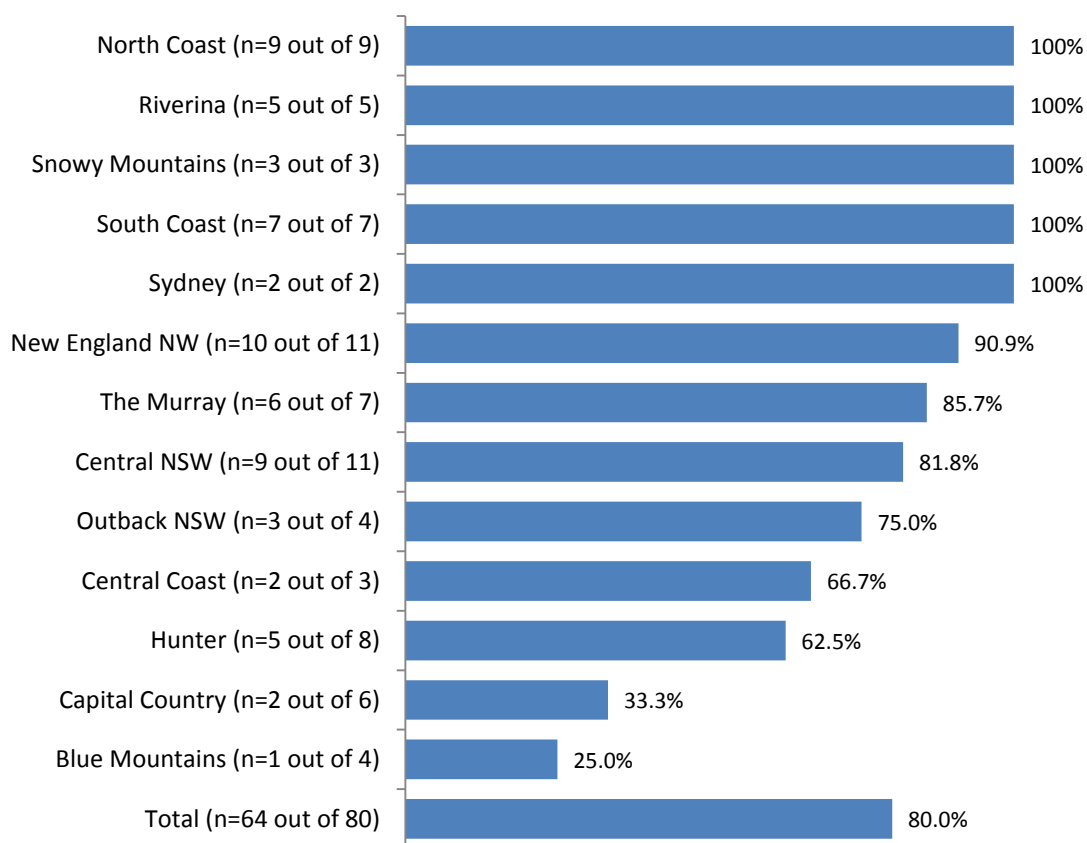
All AVICs located in the North Coast, Riverina, Snowy Mountains, South Coast and Sydney tourism regions have Wi-Fi access in their towns. In contrast, North Coast and Sydney AVICs had the lowest proportion of Wi-Fi service provision.

Figure 9: Wi-Fi services in town that visitors can access



The chart below shows the number of AVICs that responded to the question, the number whose towns have Wi-Fi service and the resulting percentages.

Figure 10: Town with Wi-Fi services accessible to visitors split by tourism regions



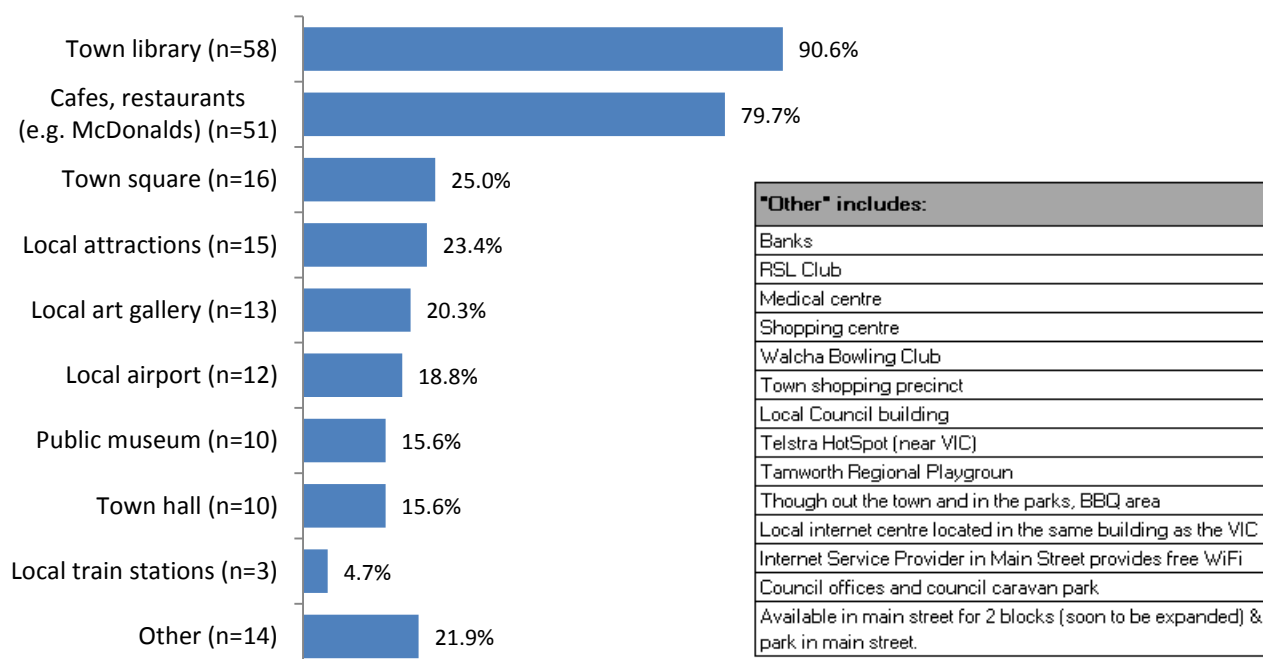
Base: 2019 NSW AVIC Wi-Fi Availability (n=80)

Q18. Does your town have Wi-Fi services that visitors can access?



Of those AVICs that have Wi-Fi access in their town, the most common access location is in their town library (91 per cent), followed by cafes and/or restaurants (80 per cent).

Figure 11: Location of Wi-Fi services in a town



Base: 2019 NSW AVIC Wi-Fi Availability (n=64) - Multiple Response Question.
Q19. In which locations are Wi-Fi services available in your town?

The table below shows the number of town locations where Wi-Fi services are available in each tourism region.

Table 3: Location of Wi-Fi services in a town split by TR (actual responses by TR)

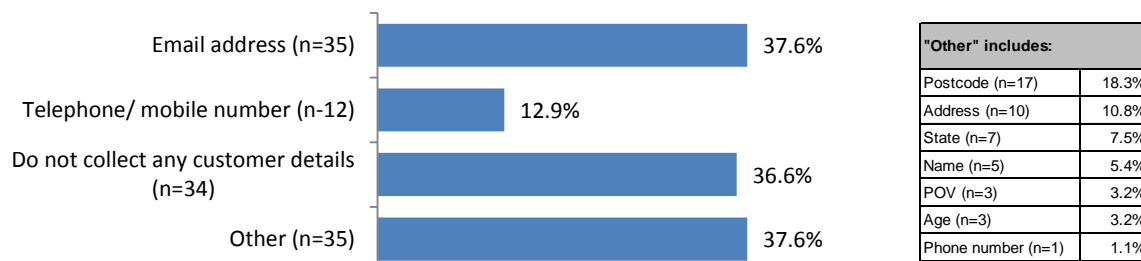
	Blue Mts	Capital Country	Central Coast	Central NSW	Hunter	New England NW	North Coast	Outback NSW	Riverina	Snowy Mts	South Coast	Sydney	The Murray	Total
Public museum	-	-	-	2	-	1	2	2	1	-	-	1	1	10
Town library	1	2	2	8	5	9	9	3	4	2	6	2	5	58
Town hall	-	-	-	1	-	2	2	1	1	-	1	1	1	10
Town square	-	2	-	4	-	3	2	1	1	-	1	1	1	16
Local airport	-	-	-	3	-	4	2	1	1	-	-	-	1	12
Local train stations	-	-	-	3	-	-	-	-	-	-	-	-	-	3
Local attractions	-	-	1	4	2	2	2	1	-	-	-	1	2	15
Local art gallery	-	-	1	3	1	1	3	1	1	-	-	1	1	13
Cafes, restaurants (e.g. McDonalds)	1	2	2	7	4	7	9	1	3	2	7	2	4	51
Other	1	-	1	2	-	5	1	1	2	1	-	-	-	14



MARKETING AND INFORMATION

Of all respondents, 38 per cent collected email addresses from their customers for communication or marketing purposes, followed by postcode (18 per cent) and telephone/ mobile number (13 per cent). Around 37 per cent do not collect customer details.

Figure 12: Details collected from customers for communication/ marketing purposes

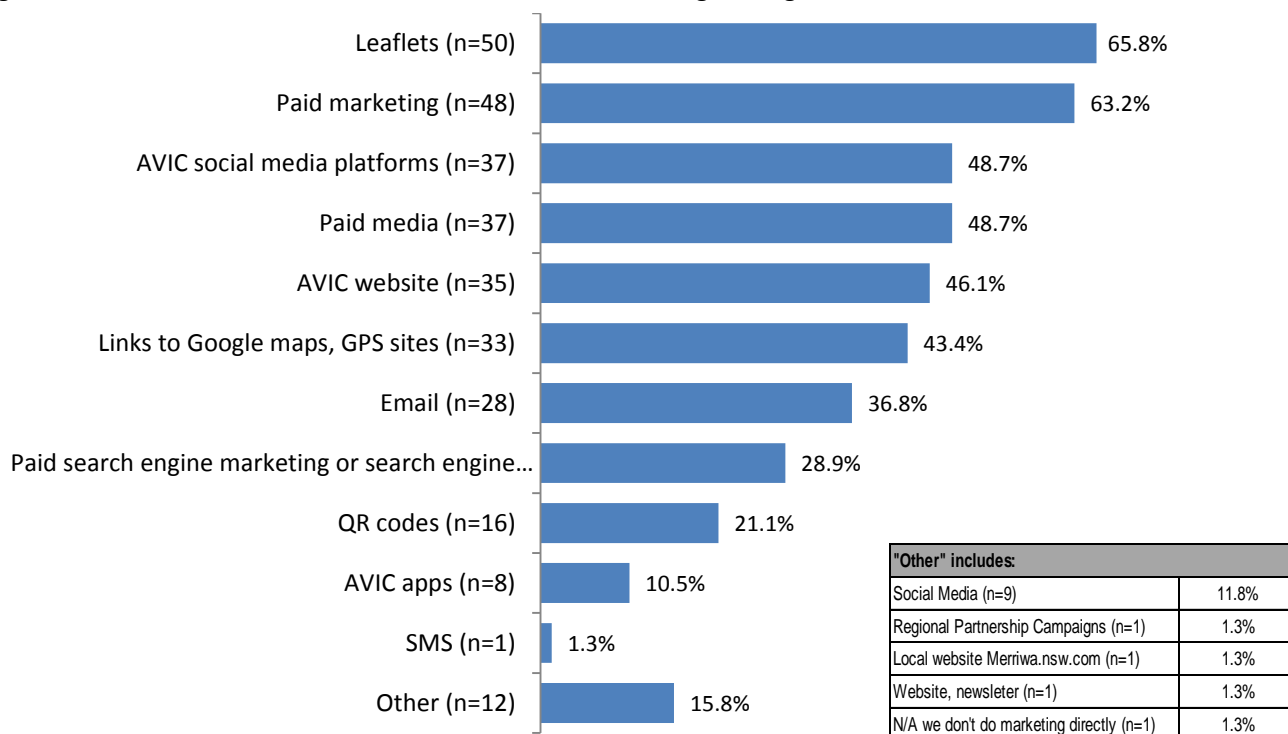


Base: 2019 NSW AVIC Wi-Fi Availability (n=98) - Multiple Response Question.

Q7. Which of the following details do you collect from your customers for communication or marketing purposes?

Of those AVICs that collect details from their customers, sending out “leaflets” (66 per cent) was the most popular channel used for communicating with or sending marketing messages/ content to their customers. “Paid marketing” was the second most popular channel (63 per cent).

Figure 13: Channels used for communication or to send marketing messages/ content to customers



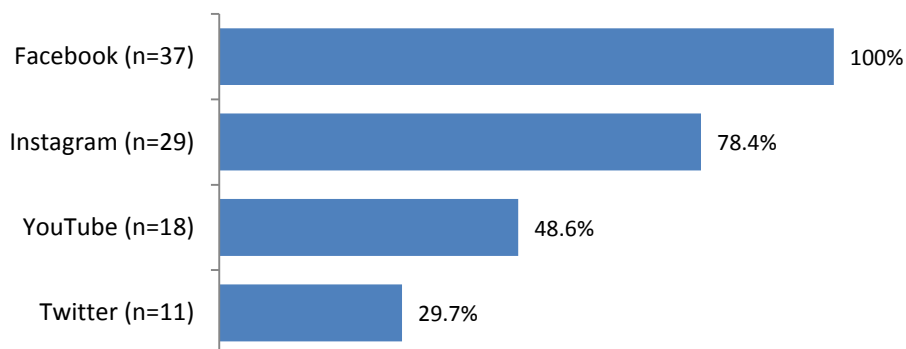
Base: 2019 NSW AVIC Wi-Fi Availability (n=76) - Multiple Response Question.

Q20. Which of the following channels do you use for communicating or sending marketing messages/content to your customers?



Facebook was used by all respondents, followed by Instagram (78 per cent).

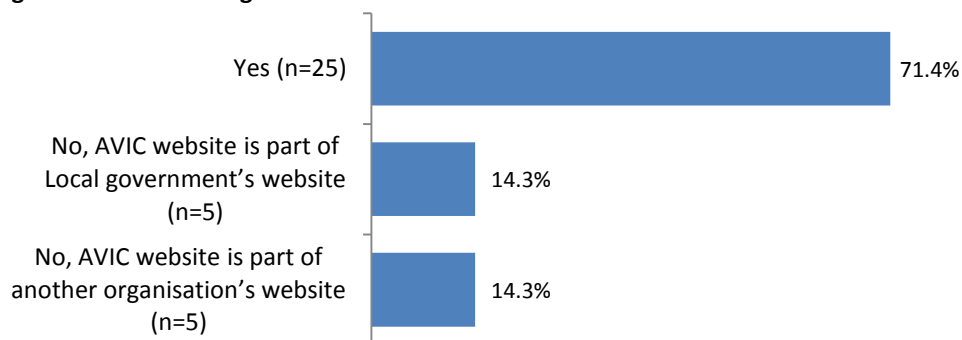
Figure 14: Social media channels used



Base: 2019 NSW AVIC Wi-Fi Availability (n=37) - Multiple Response Question.
Q21. Which of the following social media channels do you use?

Of those AVICs that communicate with their customers through their website, majority (71 per cent) manage and maintain their own websites.

Figure 15: AVICs manage and maintain their own websites

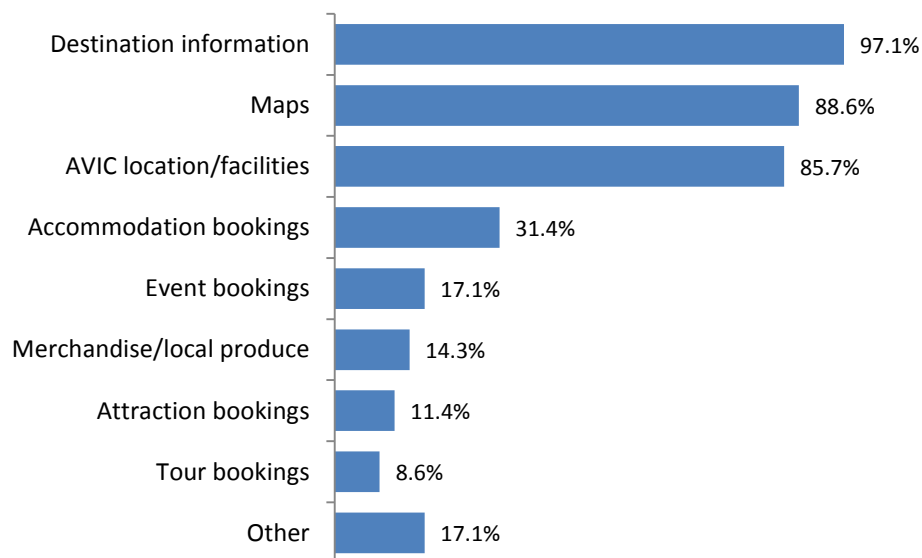


Base: 2019 NSW AVIC Wi-Fi Availability (n=35)
Q22. Do you manage and maintain your own website?



Of those AVICs that communicate with their customers through their website, “Destination information” (97 per cent) was the top information provided on their websites, followed by “Maps” (89 per cent) and “AVIC location/ facilities” (86 per cent).

Figure 16: Information or services provided on AVICs websites



"Other" includes:
Members contact and promotion - all tourism operators and properties
Information supplied on attractions accommodation but not a booking agency
Event programs and links to event bookings on eventbrite
Calendar of Events, Blogs, Industry Information
Business event and conference material, industry information
Accommodation & attraction information (not bookings), event calendar

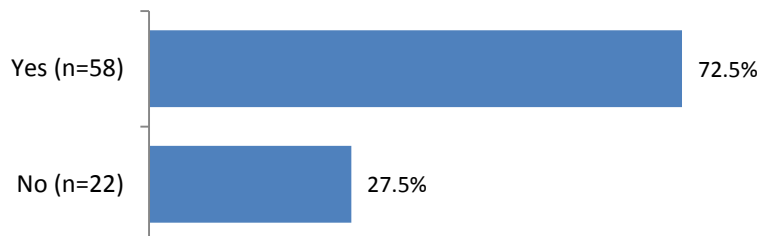
Base: 2019 NSW AVIC Wi-Fi Availability (n=35) - Multiple Response Question.
 Q23. Which of the following information or services are provided on your website?



DIGITAL PRODUCTS

Majority of AVICs in NSW (72.5 per cent) reported that they upload their digital products via the Australian Tourism Data Warehouse (ATDW) warehouse.

Figure 17: Digital products upload via the ATDW warehouse for publication on visitnsw.com or Sydney.com websites

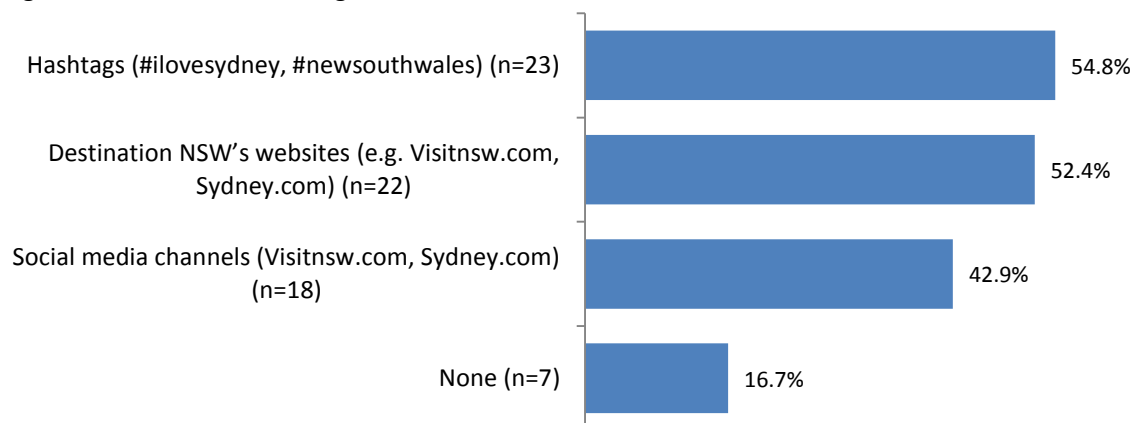


Base: 2019 NSW AVIC Wi-Fi Availability (n=80)

Q24. Do you upload digital product via the Australian Tourism Data Warehouse (ATDW) for publication on visitnsw.com or Sydney.com websites?

The most common Destination NSW digital channel that were referenced in AVIC's social media channels or websites was "Hashtags" (55 per cent), followed by "Destination NSW's websites" (52.4 per cent) and "Destination NSW's social media channels" (43 per cent).

Figure 18: Destination NSW digital channels referenced in AVIC's social media channels or website



Base: 2019 NSW AVIC Wi-Fi Availability (n=70) - Multiple Response Question.

Q25. Which of the following Destination NSW digital channels are referenced in your AVIC's social media channels or website?



APPENDIX

Table 1 – Services provided by AVICs split by tourism region.

	Blue Mountains	Capital Country	Central Coast	Central NSW	Hunter	New England NW	North Coast	Outback NSW	Riverina	Snowy Mountains	South Coast	Sydney	The Murray	Total NSW
Destination information	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Maps of the area	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Accommodation bookings	25.0%	50.0%	66.7%	54.5%	62.5%	27.3%	44.4%	25.0%	20.0%	33.3%	42.9%	100%	71.4%	46.3%
Tours, attractions or event bookings	25.0%	50.0%	66.7%	63.6%	75.0%	63.6%	77.8%	50.0%	60.0%	33.3%	71.4%	50.0%	71.4%	62.5%
Souvenir/ gift items	100%	83.3%	33.3%	90.9%	75.0%	90.9%	100%	100%	100%	100%	100%	100%	100%	91%
Drinks/ food for purchase	75.0%	66.7%	33.3%	72.7%	75.0%	45.5%	22.2%	75.0%	40.0%	33.3%	71.4%	50.0%	14.3%	52.5%
Mail service	25.0%	50.0%	33.3%	36.4%	37.5%	18.2%	11.1%	25.0%	-	-	-	-	-	20%
Wi-Fi service	100%	50.0%	100%	81.8%	100%	81.8%	44.4%	75.0%	60.0%	66.7%	71.4%	50.0%	57.1%	72.5%
Phone charging service	100%	50.0%	66.7%	63.6%	100%	63.6%	44.4%	75.0%	20.0%	-	57.1%	-	42.9%	57.5%
Other	25.0%	33.3%	-	27.3%	37.5%	27.3%	11.1%	50.0%	20.0%	33.3%	57.1%	-	28.6%	28.8%

Base: 2019 NSW AVIC Wi-Fi Availability (n=80) - Multiple Response Question.

Q11. Which of the following services are provided by your AVIC?

Table 2 – Facilities available at AVICs split by tourism region.

	Blue Mountains	Capital Country	Central Coast	Central NSW	Hunter	New England NW	North Coast	Outback NSW	Riverina	Snowy Mountains	South Coast	Sydney	The Murray	Total NSW
Toilets/ restroom	100%	100%	100%	90.9%	87.5%	90.9%	88.9%	50.0%	80.0%	66.7%	85.7%	50.0%	100%	87.5%
Café/ restaurant	-	16.7%	66.7%	45.5%	37.5%	27.3%	11.1%	50.0%	-	33.3%	28.6%	100%	28.6%	30.0%
TV/ Digital screen/ Digital signage	25.0%	66.7%	66.7%	45.5%	62.5%	63.6%	33.3%	75.0%	60.0%	66.7%	85.7%	50.0%	57.1%	57.5%
PC/ Laptop/ Tablet4	25.0%	33.3%	33.3%	27.3%	37.5%	45.5%	44.4%	25.0%	40.0%	33.3%	28.6%	-	28.6%	33.8%
Recreational vehicle (RV) dump point	-	-	-	9.1%	37.5%	9.1%	22.2%	75.0%	20.0%	33.3%	-	-	28.6%	17.5%
Overnight parking for RVs	-	33.3%	-	9.1%	50.0%	18.2%	-	50.0%	20.0%	33.3%	14.3%	-	28.6%	20.0%
Other	25.0%	33.3%	-	18.2%	12.5%	36.4%	11.1%	-	60.0%	-	14.3%	-	14.3%	20.0%
Total	100%	100.0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Base: 2019 NSW AVIC Wi-Fi Availability (n=80) - Multiple Response Question.

Q12. Which of the following facilities are available at your AVIC?

