

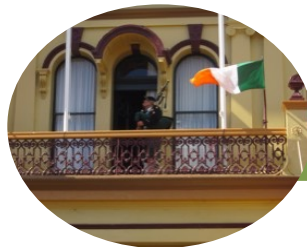
TRAVELLERS' PULSE NEW ENGLAND NORTH WEST RESEARCH INSIGHTS



NEW ENGLAND - NORTH WEST

TRAVELLERS' PULSE

Qualitative research was undertaken by DMS to understand the perceptions and motivations of visitors to the network area. This included an internet-based focus group, where 24 participants entered into a dialogue around travel experiences in the destination. Sentiment analysis was also used to explore over 1000 Tripadvisor and Google reviews of key experiences in the destination. Analysis of the data has led to an understanding of visitor motivations and experiences under the following three themes.



Coming home



New tracks &
towns



Icons &
Drawcards

Within these three themes the results were analysed through a process of coding and theming, to highlight the key thoughts and sentiments of participants. The results are presented under the following topics:

- Key experience themes
- Motivations to visit the destination
- Visitor segments

Theme 1: Coming home

The theme of *coming home* relates to returning to properties and homes, where people were born, raised and educated - or returning to a Celtic family connection. This was a strong theme across the forums and the sentiment analysis.

GEN X FAMILY

My partner and I love to go to Tamworth every year. We have friends who have a property there and we go and have down time from the big smoke

We were visiting our friends who live in Tamworth and they took us to the country music festival



Quirindi

I love my hometown Quirindi. They most recently had the silos in the centre of town painted with a beautiful mural I wanted to see

We also love visiting the area because we have friends and family - even if we are heading to a different area higher up into QLD or coast, we always try to make either the 'to' destination or 'home' destination via New England

It was really important to see our friends as we hadn't seen them in quite some time after their move to Tamworth

We enjoy seeing our friends once a year and normally we do like a big you know sort of get together

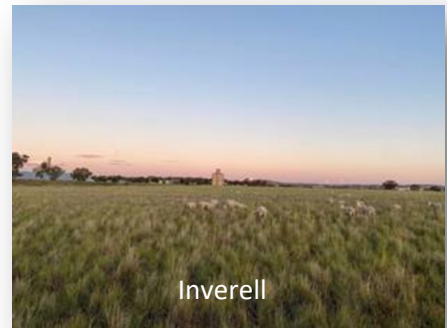


Glen Innes

BOOMERS

The area is close to home and the heart, allows time with family, get outdoors etc

My husband's family came from Inverell, so over the years we have been there often and it is a delightful town.



Inverell

Being married to a Scot, we were very interested in visiting the Stones at Glen Innes. We were pleasantly surprised by the whole town

Both of us also studied externally at New England University in Armidale and have visited over many years

My second son, his wife and two of my grandchildren live in Armidale as well as my ex. I have also attended UNE many years ago

Visited Glen Innes for the Festival and for a family reunion, my wife is an Innes and is related to the founder through one of his sons.

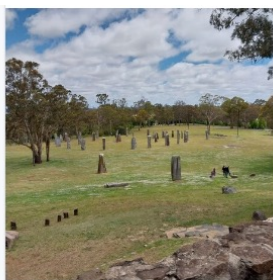
Experiences related to the *Coming home* theme

Sentiment Analysis of the products/experiences related to this theme highlights the appreciation of history and Celtic connections found at the Australian Standing Stones. Most sentiment is positive and many find it historically interesting. Albeit cold at times, with good facilities.

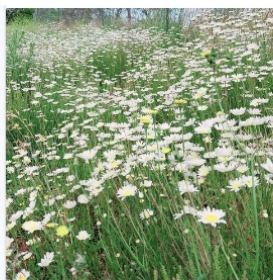
Australian Standing Stones



4.0 ★★★★★
Dec 7, 2022



4.0 ★★★★★
Dec 7, 2022



4.0 ★★★★★
Dec 7, 2022



4.0 ★★★★★
Nov 27, 2022



Well worth a visit

Jul. 2022

Despite it being very cold, we spent a good hour wandering around these magnificent stones and learning some of the history.



Nice history.

Dec. 2021 • Couples

Some very interesting pieces of history to learn here and very informative, sunset makes for a great photo opportunity.

Wasn't quite sure about the little shop/cafe was quite expensive.

Theme 2: New tracks & towns

The theme of *new tracks and towns* relates to finding new places in National Parks, or local towns that offer new walks, drives, views, food or drink. Both for return travellers and new travellers the region is full of new surprises.

GEN X FAMILY

We do lots of walking and discover new tracks to explore.

We most love exploring and visiting different areas -stopping in at the lesser known towns and just seeing all the non touristy places

We wanted to see Waterfall way from Coffs Harbour and the New England Regional Art Museum

I always enjoy the experiences , good and bad, visiting a new place on holiday can bring - including the people you will meet.



I would go to somewhere I have been before to experience something new.



BOOMERS

We have found towns we never knew about and great parks & bush areas

We drove out and past Tenterfield Armidale & Glen Innes and just stopped to check out eating places - we are both foodies.

Smaller towns like Tenterfield have such a history. Peter Allan's iconic song was based here.

When we travel in NSW we usually do a circuit of towns we haven't been to before and if we find somewhere exceptionally pretty and or interesting we may consider revisiting the area as part of another trip..

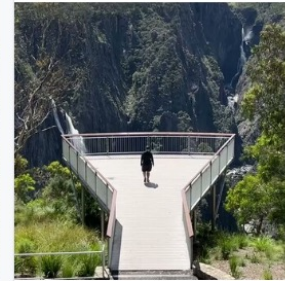


Had **seen turnoff to Bald Rock** many times and it had been years since I saw it, and rest of family had never been there

Experiences related to the New Tracks & Towns theme

Sentiment Analysis of the products/experiences related to this theme highlights the positive perceptions of the natural attraction of the Wollomombi Falls as well as the facilities such as walking tracks, toilets and picnic areas.

Wollomombi Falls



5.0 ★★★★★
Dec 17, 2022

5.0 ★★★★★
Nov 30, 2022

Reviewed 25 July 2022

Great view of the waterfall.
May 2022

Great view of the waterfall. There are walking tracks where you can see it at different angles. The notice board there tells you the grade of each walk so you know if it fits your ability

Spectacular views all around - two waterfalls, impressive canyon, a river. Went to the end of the walk to Chandler Lookout and then a short trip to Checks Lookout. Both well worth the effort (which isn't big in all honesty - it's a short paved walk).

Sentiment Analysis of the Welders Dog also demonstrates the positive perceptions of new experiences in towns like Armidale where the brewery delivers a new addition to the traditional pub scene.

Welders Dog



Reviewed 26 January 2021 via mobile

Great range of craft beer, cocktails and interesting wines

Had the pleasure of visiting this little taphouse in the heart of Armidale on 21 January. Great friendly atmosphere, ideal for a quiet drink and just sitting watching the regulars come and go and the foot traffic passing by. Very attentive and knowledgeable barman who steered us through the range of local and regional brews and very interesting cocktails. A must to visit in Armidale.

Theme 3: Icons & Drawcards

The theme of *Icons and Drawcards* relates to the abundant range of unique iconic attractions and events in the sub-region. From man-made drawcards such as the Tamworth Country Music Festival, Silo Art and the Australian Standing Stones, to natural attractions and National Parks, the area has unique drawcards that attract both return travellers and first timer visitors.

GEN X FAMILY

The country music festival and of course the golden guitar

The place we wanted to see most was the country music festival

Tamworth - due to the country music festival history.

I wanted to see Tamworth music festival



Waterfall way from Coffs Harbour and New England Regional Art Museum

I travel with a teenager who does many sports trips to New England towns

Warrabah National Park is so impressive. It has so much to do for families

BOOMERS

Tamworth with its fabulous country music festival is a stand-out

we used to travel to Tamworth a lot to experience the Country Music Festival and enjoy the whole musical experience, it was magic.

Tamworth Country Music Festival. I'm not even into country music but the vibe in town is like nothing I've experienced before.

Whilst in Tamworth I was told about the silo art and I wanted to go to Barraba and take photographs



Australian Standing Stones - I just find it mesmerising and yet peaceful to sit and drift away

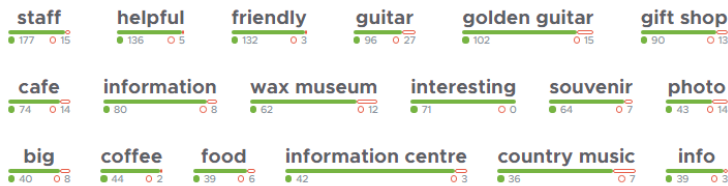
I wanted to see the sunflowers in Quirindi for my birthday



Experiences related to the Icons & Drawcards theme

Sentiment Analysis of the products/experiences related to this theme highlighted the strong diversity of iconic experiences and the attraction for visitors from afar. Note the importance of the friendly staff to the experience, mentioned often by visitors, as well as the importance of coffee and food to the total experience.

The Big Golden Guitar



Great wax display of country music and its history

Aug. 2022 • Couples

We were here 3 years ago before the addition of the guitar museum. The wax museum history is even better than we remembered with good history of country music. The guitar museum is excellent with some great displays and information

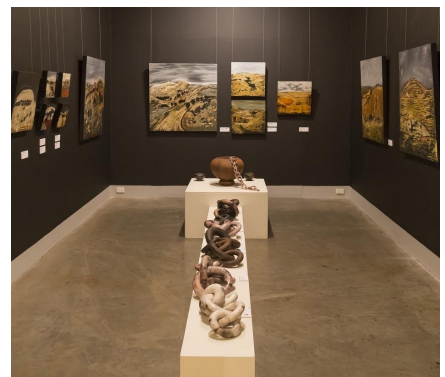


We came from afar to see this guitar

Jul. 2022

It's very gold. A trip to Tamworth without seeing the Golden guitar would not be a trip to Tamworth. We stayed at the Motel 359. You can walk from there to the guitar and then have McDonald's. Inside the information centre you can buy these little gold guitar magnets for

New England Regional Art Museum



Outstanding regional gallery

Aug. 2022

Such a great gallery. Staff and volunteers are amazing and helpful and passionate about art. Well worth a visit!

Motivation typology

Tourism Australia¹ has recently developed a typology of visitor motivations which assist us to understand why visitors come to a destination. The themes discussed from our research into NENW align with many of the general motivations. Interestingly, it demonstrates the diversity of motivations and reasons that visitors have to explore the area. It also suggests that the area is providing a range of relevant experiences to meet the interests and motivations of visitors.

Motivation	Activity	Forum quotes
 Reconnection	Reconnect, spend quality time with others,	<p>we ended up loving it all because of its connection with Celtic culture.</p> <p><i>We enjoy being with family, and we try to attend many family special times.</i></p> <p>NSW is where all 4 of us were born and raised and so it will always be our home.</p>
 Into nature	Get in touch with nature and feel relaxed	Staying in an accommodation surrounded with nature is so relaxing for me.
 Exploration	Explore new destinations, Learn & experience new things	Each country town is unique and most have something different to offer.
 Adventure	A sense of adventure, challenge and fun	The thrill of exploring a new place is amazing
 Wellness, Transform	Focus on mental and/or physical wellbeing and transformation	It's the serenity of it all that takes us back every time.
 Passions, hobbies, events	Engage in activities, and events which focus on hobby or passion,	<p>I love Photographing horses and country music artists.</p> <p><i>I'd love to go to Tamworth to the country music festival on my next trip.</i></p>
 Restoration*	Indulge & pamper, Have fun & enjoy myself.	

Note: The majority of responses related well to five of the seven typologies. It is however acknowledged that smaller segments may travel to the area for both restoration and nature experiences. These were not captured in the current research study.

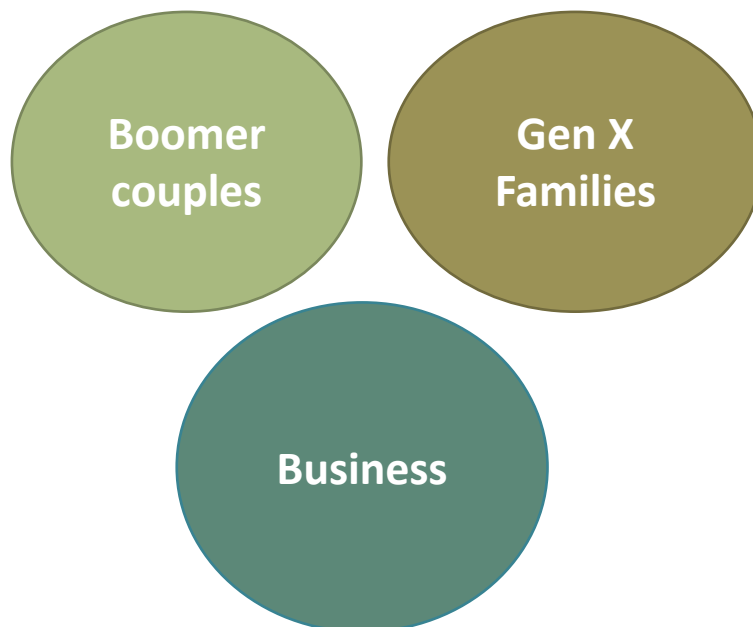
1. Source: Tourism Australia (2022) Future of Global Tourism Demand

Traveller segments

Visitor Segment Analysis highlights the common characteristics and behaviours of the main segments of the total road tripper market. As shown the two key generational markets are Boomer Couples and Families. These two segments have different needs and behaviours.

Older couples are in the Baby Boomer generation (58-75 yrs). They are decisive, confident travellers that prefer slow exploration, arts/heritage and sightseeing. They like friendly country comfort and simplicity and enjoy dine/wine travel experiences. They enjoy finding peace in off-peak travel times and off the track cultural places.

Families are mostly in Gen X (43-57 yrs) using jam packed itineraries to meet the needs of the kids and adults too. They enjoy exploring hands-on and active attractions, and seek food and accommodation that can suit the whole family. They need regular breaks in the roadtrip and look for good value (or free) activities.



Business travellers comprise a third of all visitors. They are looking for accommodation with specialized facilities such as: **Wifi**, computer desks, USB charging, lighting, breakfast to room, fast checkout and enjoy being recognised as valuable return customers. Business travellers are less likely to visit attractions or activities, yet will spend well on dining. Some were noted to return with their families for holidays.