

# TRAVELLERS' PULSE DNCO NSW ONLINE TRAVELLER FORUM 2024



# DNCO NSW

## Online Traveller Forum

April 2024

The online traveller forum uses qualitative research to explore the perceptions and travel behaviours of visitors to the network area. Designed as an internet-based focus group, participants enter into a dialogue around travel experiences in the destination and explore their motivations to travel there. The forum included equal numbers of visitors to the three destination network sub-regions of a) New England/North West, b) Outback NSW and c) Great Western Plains.

The forums also analysed differences between the two visitor segments identified in previous stages as Gen X families and Baby Boomer couples. Visitors were from Sydney, Qld and regional NSW and had visited within the previous three years during and after Covid travel restrictions. Half had visited in the past 6 months:

- 24 participants,
- 35- 70+ years,
- Even split of “older couples #12” and “family #12” segments
- Sydney (#10), Melbourne (#1), SA (#1), QLD (#6), Regional NSW (#6)

The forum ran for 3 days, covering 20 discussion items and collecting over 3000+ words for analysis. Using a process of thematic analysis, the results were coded, grouped and categorised to show the most common themes, while highlighting some of the key thoughts and sentiments of participants. It is also noted that the key icon attractions such as Toronga Western Plan Zoo, Wellington Caves. Tamworth Music Festival to name a few where not included in this research. The TRA data highlights the importance of these major attractions to the region. This specific forum was about understanding other key experiences and motivations for people to travel to the region. The results are presented under the following topics:

- Emotional responses to experiences within the destination
- Exploring perceptions of key destination experiences
- Mapping the customer journey; trends and frustrations

Key insights from the analysis are provided in each of these areas.

# Top 10 forum insights

1. Visitors have very positive culinary experiences and are willing “try anything” along the way.
2. Emphasis on supporting local businesses using fresh ingredients. Whether through restaurants, small cafes, bakeries, pubs, or markets.
3. Farmers & food markets are most popular agri-tourism experiences offering positive connections with people and produce. They offer opportunities to promote more specific farm tours and experiences.
4. Nature experiences of Gondwana are perceived as unique and exciting; offering opportunities to reflect on past times and peoples of the region. Nature experiences are highly valued as places of peace and tranquility away from busy cities.
5. Interest in creative/cultural tourism varies from a fleeting interest in culture to passionate interests in arts practice. Although some visitors did not feel they had enough time to engage in creative/ cultural activity.
6. Three core emotions of joy, tranquility and wonder were identified in the experiences of visitors to the region. Understanding these three emotional responses to visitor experiences can assist in developing relevant messages and information for visitors.
7. Customer Journey Mapping: Visitors use a wide variety of sources for inspiration when thinking about their holiday choices including friends and family, but Google is dominant throughout the visitor journey to source location, accommodation, maps and activity information.
8. An increased trend was noted in people searching online then phoning accommodation/activities to book.
9. While accommodation is mostly prebooked - visitors enjoy the freedom to discover places and activities “along the way” on a road-trip.
10. Local people are valued sources of information through all the journey stages via VIC, accommodation hosts and families.

# Experience themes

The forum focused on the perceptions of four main experience themes asking visitors how they felt about these experiences in the region

## Creative & Cultural

- Galleries, studios, workshops
- Tours, museums
- Heritage sites
- Music and arts festivals

## Culinary tourism

- Cafes, restaurants
- Markets
- Food festivals
- Food and wine tours
- Breweries and vineyards

## Nature of Gondwana

- Aboriginal heritage sites
- Tours and walks
- Night skies
- National Parks

## Agri-tourism

- Farmgate
- Farmstay
- Agricultural tours
- Field Days



**Note: the major attractions are an important drawcard to the region. Perceptions of the Western Plains Zoo, RFDS and other sites were previously assessed in 2023, not included in this study. Ask DMS for a summary of those results.**

# Experience theme: Local cuisine

Local cuisine allows visitors to explore restaurants, cafes and other dining choices. It seems everyone needs to eat! But we all have different priorities for finding food.. The good news is that most of our participants *are willing to try anything* ! Even Yabbies on the menu.

As shown below they found a wide variety of food to meet their needs

1	4.5%	Farm stay
11	50.0%	Farmers Markets
8	36.4%	Wineries
3	13.6%	Farm gates
10	45.5%	Food markets
3	13.6%	Breweries
2	9.1%	Distilleries
3	13.6%	Farms tours
5	22.7%	None of the above

We also asked specifically, “what is it about local cuisine that you enjoy or appreciate? Won't any good food do?” The overall theme in this response was to support local business, and to find fresh and local produce.

## Supporting local business

bakeries

pubs

cafe

markets

## Fresh and local produce

Local foods support local businesses and the local economies

We found a good restaurant - if this wasn't open or too busy then I would have resorted to Maccas.

Just supporting local businesses and decent basic food is good to me. Don't need anything fancy or over the top.

I think for us it's the freshness and the supporting local businesses that is most appealing rather than supporting the bigger chains along the way.

We liked eating mostly plain food. Lots of steak was a treat.

We are not real foodies, but just enjoy good quality fresh meals .

I was surprised to find Asian food which were really good.

Food is food to us, we aren't overly adventurous or fussy

If there a specialty of a town on the way would love to try it

Surprises.... I think it was Deniliquin (Not sure) last year where I was served a plate of Yabbies. I have to say it was a surprise to see it on the menu and i just had to try it. Bringing something different adds to a local experience.

It's local and fresh and the staff are more friendly

I love to taste a good pub meal, or find a good bakery that specialises in something that makes them famous, always make sure to spend money in local establishments

Local cuisine is prepared with mostly local produce and a lot of love, care and attention.

Its homemade, has unusual flavours, and often comes in a bigger serve or with a surprise like icecream or a chocolate/marshmallow with coffee.

**Key insights: 1. Visitors emphasized their own priorities on supporting local businesses using fresh ingredients. Whether through small cafes, bakeries, pubs, or markets.**

**2. Visitors are open to new experiences and are willing “try anything” as part of their experience.**



# Experience theme: Agritourism

The Country and Outback landscape abounds with farmland, paddocks and pastures which we all enjoy from the comfort of the car. Yet there are specific experiences around farm stays, farm produce, farmers markets and farm tours. We asked which experiences visitors had undertaken, and how they felt about them.

0	0.0%	Farm stay
6	54.5%	Farmers Markets
4	36.4%	Wineries
0	0.0%	Farm gates
5	45.5%	Food markets
1	9.1%	Breweries
1	9.1%	Distilleries
1	9.1%	Farms tours
4	36.4%	None of the above

## Farmers and food markets

Around half of participants had visited farmers' markets. We asked what do they enjoy about them? And how does an experience at the farmers' market make you feel?

Local  
people

knowledge

people

atmosphere

Fresh  
produce

Direct  
from farm

fresh

I do love farmers markets as well - something about **the atmosphere that just makes you feel so good and relaxed and calm**. I think it's the amount of fresh produce and knowing that you are supporting local farmers and not big chain supermarkets that makes you feel good and you are also getting top quality products at a reasonable price.

I think also the customer service aspect of it is also a highlight - everyone is always so friendly and open for a chat and willing to share their knowledge of the products with you

Everything!!!! I like that they are fresh, cheaper and friendly people who take the time to chat with us.

We often got to markets while away. It is a good indication of what an area offers and you can often find locals who will gladly tell you the best places to visit to provide assistance while there. Also they are good places to purchase gifts for people back home.

Farmers markets give you an opportunity to purchase food grown directly from the farmer and see what the real fresh produce tastes like instead of possibly being in storage for months at a time like what can come from supermarkets

**Key insights: Markets offer opportunities to connect with people and produce.**

**Opportunities: Pop-up VIC at the markets could facilitate farmstays and tour bookings.**

# Experience theme: Nature of Gondwana

We showed participants the experiences on offer asking which experiences appealed to them for future travel and why. The results reinforce the emotional pull of the experiences to potential visitors.

alive and  
connected

Pilliga To The Stars ticks all the boxes for me. I love space, stars, the universe, it makes me feel alive and connected to everything.

The Wellington and Jenolan caves look the most appealing, they offer something exciting and memorable that i would go out of my way to see.

exciting

Fossil Corner Canowindra... 1st of all i have never heard of Canowindra so it might be worth a look particularly since I have never been to a fossil search location in my life. Worth a look I think.

Probably the Opal place at Lightning Ridge None of us have ever been to Lightning Ridge and know nothing about opals so it would be interesting

new

I would choose Pilliga to the stars because you can walk it and feel really close to nature

Pilliga to the stars, without a doubt it shows from the land to the sea and all that is in between. To understand how the earth once was and the people that occupied it. An absolute must.

unique

Pilliga to the Stars, haven't seen this unique region before. Sounds like a unique experience day & night. Plus added sculptures, national park. Would like to visit.

I would love to see the Pilliga because I love the remoteness of places like that. Also, I have never been and really do not know anyone who has been there. The uniqueness of the area and its diverse aspects it fascinate me



MULTI-SITE ACTIVATION PROJECT PROFILE  
**PILLIGA TO THE STARS**



PROJECT PROFILE  
**WELLINGTON CAVES**



NEW PROJECT PROFILE  
**AUSTRALIAN OPAL CENTRE, LIGHTNING RIDGE**

# Reflecting on ancient landscapes

**A feature of the Gondwana is its wealth of ancient landscapes. We asked “How does travelling through and experiencing an ancient landscape impact your experience? Does it provide you time to reflect or think?”**

**Reflection**

The long stretches of road, and silence is awe inspiring and gives you time to stop and just drop everything you may be concerned about and find the inner you

**New perspectives of the land**

It gives me a new perspective on our land and what it means to our communities as gives me a moment to reflect

**Connection of land with communities**

Yes it does we stay there just to absorb the experience and if we have a guide with us we listen to the story behind the landscape it's important to remember this was our history

**Change through time**

Massively, I have aboriginal in my heritage but have never really looked into it. After coming back from Dubbo i asked my family what they knew and we have started to look into our heritage .

I often reflect and think of past times and peoples who may have lived in such places. It is so hard to imagine inland seas in the middle of desert or barren country, of extinct volcanos that are now rainforest and so on .

It makes me appreciate where we have come from and how it was "back then". I then reflect on how much mankind has destroyed and how over population and excessive human breeding has wrecked the countryside .

Time doesn't impact them, its reflective and calming

**Key insights: The ancient landscapes of Gondwana allow reflections on time and space, connections between land and communities and new perspectives on the land.**



# Creativity and culture

Exploring the local culture of a place involves engaging with locals, immersing yourself in music or food festivals and events, exploring traditional arts and crafts, learning new local skills and visiting historical sites, galleries or museums.

We asked specifically, “To what extent do you feel you had opportunities to explore the local culture?” Responses were mixed, and reflected other research into cultural tourism showing the spectrum of interest visitors have with arts and culture. From a fleeting interest to a passionate interest.

Levels of engagement	<p>We had plenty of opportunities to delve into the local culture. Living in a difference environment and waking up in a place surrounded by nature</p> <p>We did so much there and there was so many friendly people wanting to tell us everything</p> <p>I always try and see the local sites,go on a walk, love local museums to see the history of a place etc. Galleries aren’t so much my cup of tea but will go to local markets if they are on.</p> <p>I have had some opportunities to see some of my local culture. I love seeing things like caves and mountain ranges.</p> <p>Well I did visit the museum in Glenn Innes and that was pretty good apart from that there was not much more.</p> <p>I have had and still have plenty of opportunities to explore local culture. It's me who holds me back.</p>
aficionados	
enthusiasts	
dabblers	
Time constraints	<p>I felt we had ample opportunities to explore the local culture - I wish we had more time to explore more but just gives us a reason to go back and do more exploring and plan other places to visit. There is so much to see and do in country/outback NSW and so many places to explore.</p> <p>I didn't get enough time to explore the local culture as it was such a short stay, it was more meeting people from the community where we stayed or had food.</p>
Other interests	<p>It’s not really something that I was interested in. I’m sure there were many activities available that would allow you to do this but it wasn’t of interest.</p> <p>I did a fair bit of local shopping and talking with local peoples. However, on this trip I did not really explore much local culture.</p> <p>I do have the opportunities it’s really down to what you want to do and get from a holiday.</p>

**Key insights: 1.** Visitors showed varying engagement in creative/cultural tourism from a fleeting interest in culture to passionate interests in arts practice. Some visitors had other priorities on the visit.

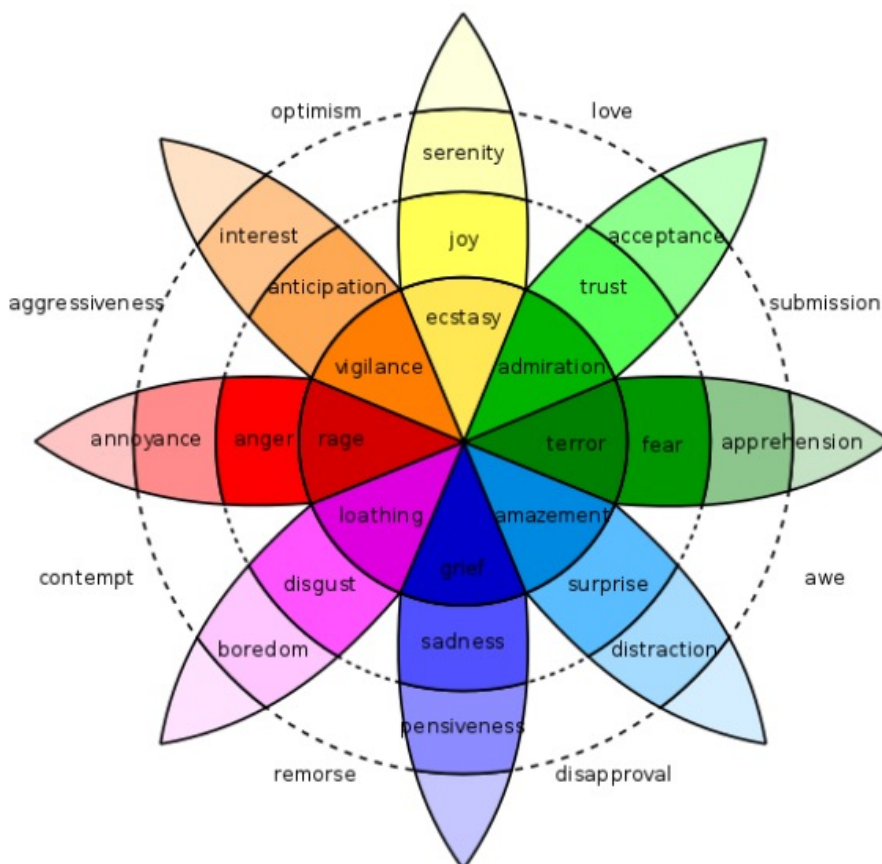
**Key insights: 2.** Some visitors did not feel they had enough time to engage in creative/cultural activity

# Summary: Emotional responses to travel

Travel in the Country Outback offers experiences which leave impressions at an emotional level. The main emotional responses that were recognised within the discussion were based around the core emotions of ecstasy, admiration and amazement as shown on the Wheel of Emotion. These emotions are described as:

1. **Serenity and peace** – *‘Something is happening that’s peaceful, pure, or purposeful’*
2. **Admiration and trust** – *‘I want to support the person or thing’*
3. **Amazement, surprise and awe** – *‘Something is totally unexpected’*

These three primary emotional territories are explored further in the analysis following, showing **how visitors feel when undertaking the experiences** we have analysed thus far. Three core emotions of ecstasy, admiration and amazement can be leveraged and targeted when planning marketing messages and materials.

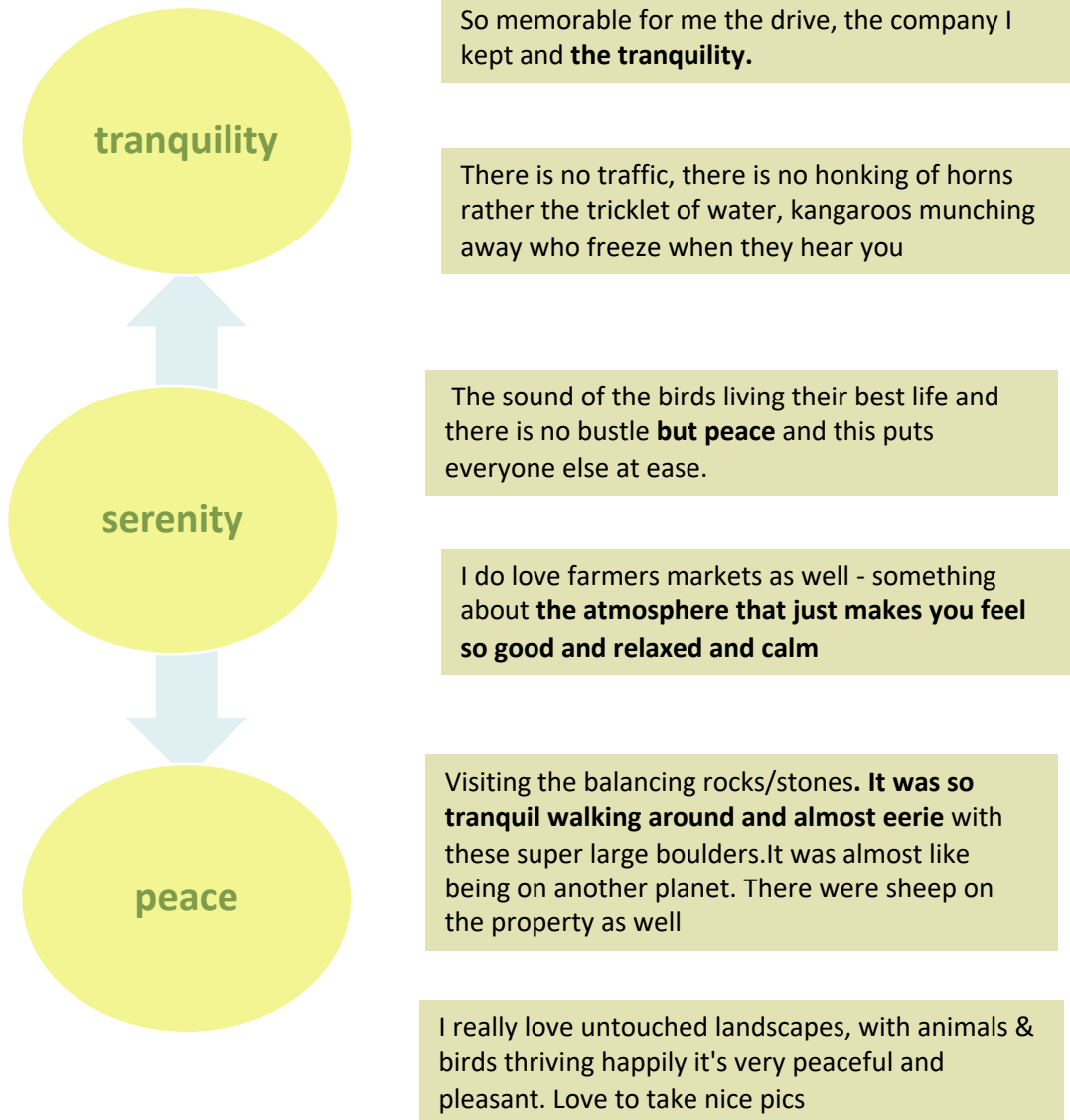


Explore more info on the Wheel of Emotions  
<https://www.6seconds.org/2022/03/13/plutchik-wheel-emotions/>

**Key insights: Three core emotions of ecstasy, admiration and amazement can be leveraged and targeted when planning marketing messages and materials**

# 1. Serenity: tranquillity and peace

The feeling of tranquility and serenity is defined as *Something is happening that's peaceful, pure, or purposeful*. **Escape from the city (or other home) and exploring the country delivers enhanced feelings of serenity, tranquility and peace.**



Key insights: Experiences in nature and farmstays that invoke feelings of tranquility, peace and serenity are highly valued.

## 2. Admiration: trust and acceptance with friends and family

**The feeling of admiration is defined as feeling proud and connected ‘I want to support the person or thing’. It is often associated with feelings toward family and friends, and is therefore important to visitors travelling WITH family and/or on the way to SEE family. Both circumstances result in an enhanced feeling of admiration, trust and connection.**

### Admiration and trust

Connection while travelling *with* family

Spending time with your family is priceless. My kids will grow up to have their own lives and family and get into the busy working life. If not now, then when?

As a family we love exploring new places and learning about different areas and cultures and things .

Just about connecting with my family and creating memories

The kids loved that the drive wasn't too intense and loved the change in scenery. From nothing to little towns to guessing how many McDonalds there would be along the way... little townships and hills/trees one lane to two, to be stuck behind trucks but taking it all in and giving us so much to talk about.

### Admiration and trust

Connection to see family and friends

We felt refreshed after the holiday, and more connected to our country friends.

Family friends are locals and know what to do

just time out to connect with family and our country

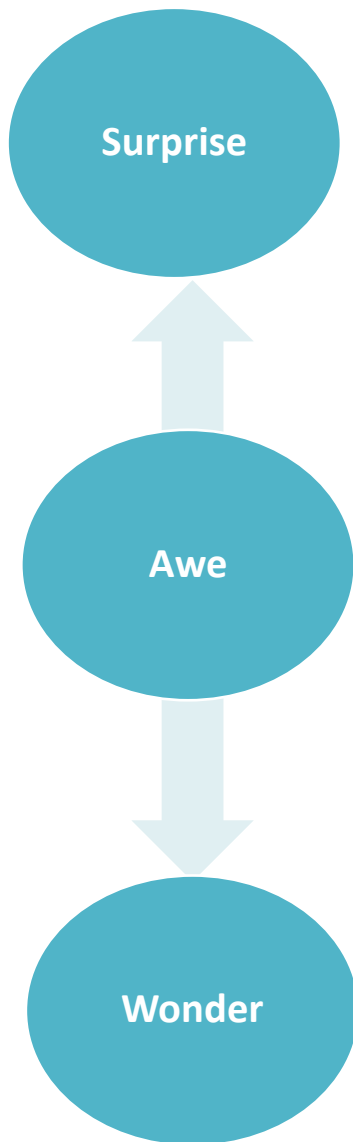
It was great to get away for a short break so that ladies could catch up

I met up with a friend and spent all my time with her.

Key insights: The element of personal connection is felt through the process of travelling with family and to see family. Taking time out to connect strengthens the bonds of joy, love and trust.

### 3. Amazement: Surprise and awe

**A driving holiday gives many opportunities to feel amazement defined simply as *Something that is totally unexpected*. It includes related feelings of surprise, wonder and awe at people and places along the way.**



Surprised at the friendliness of all the people we encountered in any context

I will never forget travelling through Gilgandra NSW and seeing hundreds of Cockatiels hopping through the grass almost in a parade formation eating the grass seeds along the river just out of town. It was a special moment

Surprises.... I think it was Deniliquin (Not sure) last year where i was served a plate of Yabbies. I have to say it was a surprise to see it on the menu and i just had to try it

Knowing where we are walking or travelling, people and cultures have been walking for thousands of years. It does add a sense of awe to the experience.

When we were at Broken Hill, we got to go to one of the exhibitions involving mining. It can be **an eye-opening experience** to see what the miners go through to bring all these minerals to the use for the population

It all us to think about the travels of days past and continuing that tradition allows us to take in the wonders our great country provides.

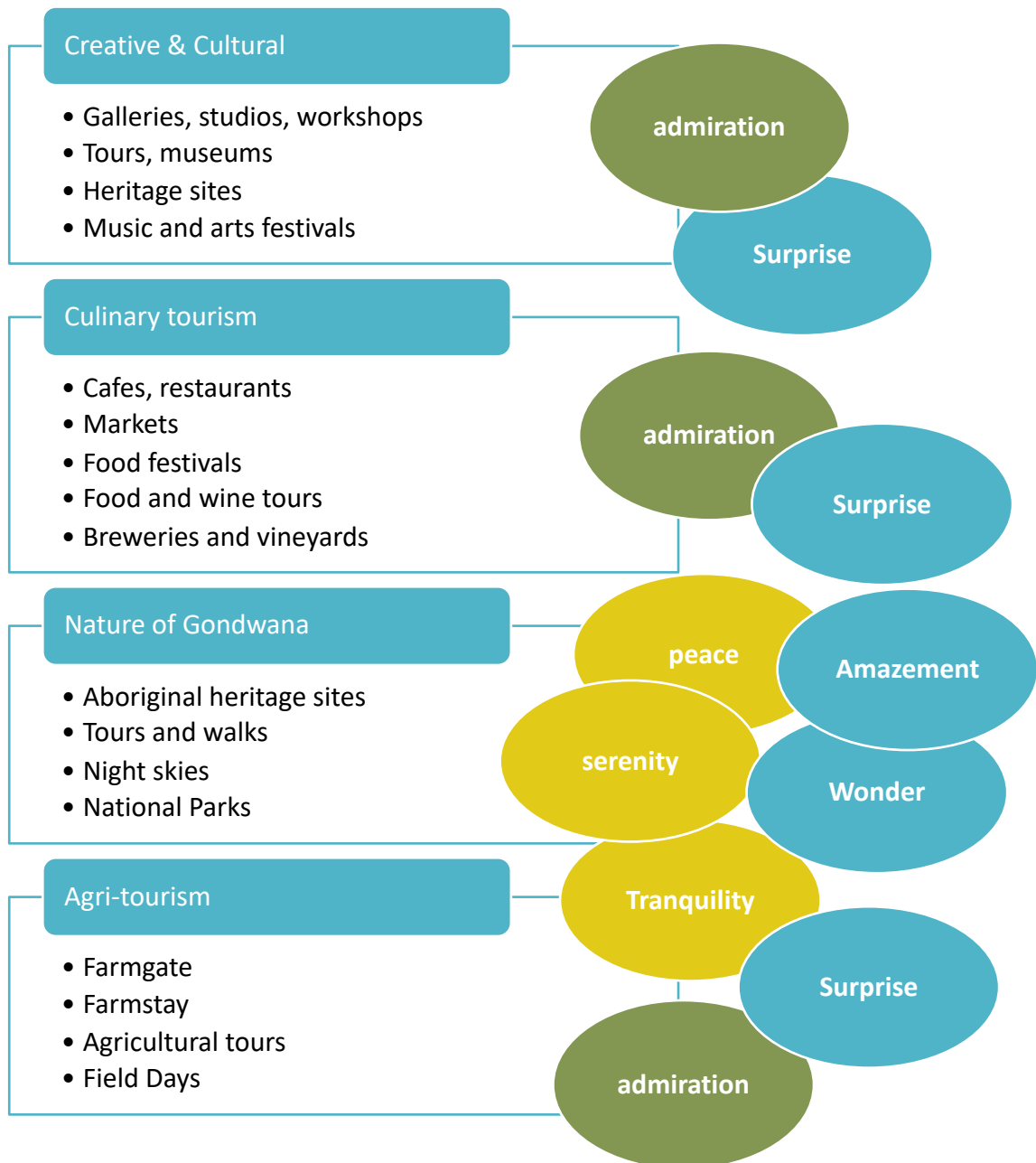
Traveling through an ancient landscape can open up a wealth of history and knowledge and make you wonder how people lived in these areas without all the conveniences we have today.

One place I found really intriguing and very interesting was Captain Thunderbolts hideaway near Uralla. It was amazing to be at such a place and try to imagine what it was like all those years ago

Key insights: The element of surprise and wonder is found in meeting new people, places and landscapes. Surprise can also be found in culinary experiences and attractions.

# The nexus of experience and emotion

Analysis of the comments around the four experience themes, shows how visitors *feel* when engaged in these activities. Evoking an emotional response helps to make memories and connections to place and people.



Key insights: Understanding the emotional response to visitor experiences can assist in developing relevant messages and information for visitors. Connections to people through love and trust is found in creative and culinary tourism experiences, while peace, tranquility, awe and wonder were found in nature and agricultural experiences.



# Mapping the customer journey



Having established why visitors travel to the area, we were now interested in mapping their customer journey from inspiration to post-trip. When asked for the starting point for planning the journey we found visitors relied on personal connections (friends, family) and their own previous trips as their main source of inspiration.

During the search and booking steps, hotels sites such as Booking.com were common, however there was an increased ***trend in people searching online then phoning the accommodation to book.***

*I use local websites, we like to book direct so most of the \$ go to the venue not airbnb or hotels.com etc.*

During the pre-trip and in-trip there were discussions with travel companions and a few lists were made, but for most there was a sense of ***freedom in finding things along the way***, and not having a tight plan.

*There was no formal pre-trip list of things to do and see. My wife and I discussed various places and attractions that we might see but left it up till we got to the relevant places.*

Or

*Just google the places and things we want to do so we have a good idea of what is happening but leave enough time spare for things we see there or drives around.*

*Sometimes you see something you are interested in and make the effort to stop and look, other times you hear people talking about an experience they have had so makes you look further into it.*

**Key insights:** 1. Increased trend in people searching online then phoning the accommodation to book.  
2. Freedom and relaxation in finding things along the way on a road-trip.

# Mapping the customer journey



Inspiration

Shopping

Booking

Pre-trip

In-trip

Post trip

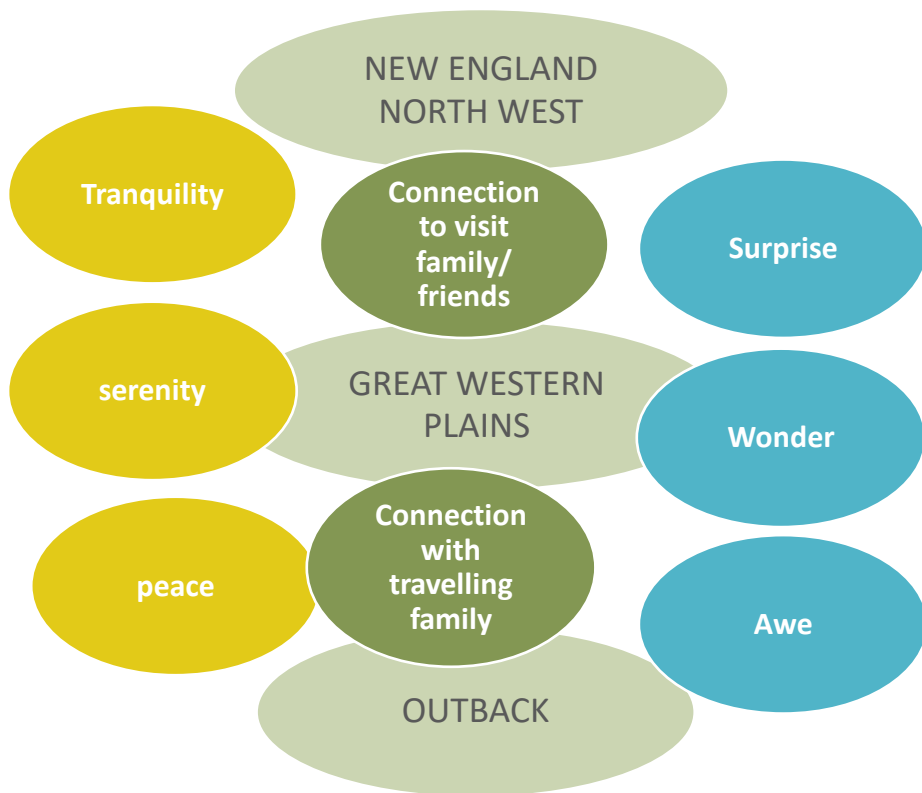
inspiration	shopping	booking	Pre-trip	In-trip	Post-trip
Friends and relatives	Google	lastminute.com	Google Maps	booking.com	Google reviews
Google Maps	local tourism websites	booking.com	friends advice	see what's on offer	Facebook
friends social media posts	Airbnb	local website	travel diary	recommendation from accommodation	TripAdvisor
travel blogs	zoo website	telephone the accommodation	travel list	walk around town and see	Airbnb
local tourist information websites	accommodation websites	agoda.com	family discussions	VIC	plan repeat visits
good weekend	vics websites	Airbnb	check weather apps	speaking with locals	none X 9
previous visit	Expedia	taronga.org	check tickets	TripAdvisor	
travel websites		Expedia		weather apps	
VisitNSW		country music tickets		Google	
Google search X2					
VIC					
Country music websites					
TripAdvisor					
booking.com					

Key insights: While Google is dominant throughout the visitor journey, visitors use a wide variety of sources when thinking about their holiday choices. Local people are vital sources through all the stages via VIC, accommodation hosts and families. Local websites preferred to see what's on offer.

# Results overview

Exceptional experiences in a destination invoke an emotional response – how the visitor feels when they immerse themselves in a place or activity. An emotional response deepens the memory of the place,

Results from the forum were assessed to identify the primary **emotional responses to the visitor experience**. Their responses and perceptions reflect the diversity of landscapes and cultural experiences across the network area, from the natural attractions and drawcards in the north to the freedom and wide spaces of the outback.



While there were commonalities across the region, there were also differences found across the destination network area. For example where “**connecting to home**” to visit family is a common response in GWP and NENW, it is not as common in Outback NSW. Alternately, the feelings of peace, awe and wonder are a primary emotional response in the Outback.