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**TOURISM  
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## **NORTHERN TERRITORY VISITOR TOUCH POINTS**

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**Executive Summary**

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**AUGUST 2014**





## NORTHERN TERRITORY VISITOR TOUCH POINTS

Tourism Research Australia and Tourism NT contracted Hall and Partners Open Mind to conduct research during the second quarter of 2014 to understand the influence of ‘touch points’ within the Northern Territory for interstate and international visitors.

A destination ‘touch point’ is any point of contact that a visitor uses to find out about a product or service, or to make a booking or purchase. These include, but are not limited to: locals; other travellers; travel agents; friends or family; taxi drivers; staff at local businesses; operators/tour guides; brochures; websites; guidebooks; and various services offered at Visitor Information Centres (VICs).

### INTRODUCTION

When visitors decide to travel, the amount of planning and booking arranged prior to the trip varies depending on the type of experience they want. Some people like to travel as part of a fully organised package tour with very little flexibility. Others only book the first night of accommodation or even ‘figure things out when they get there’ to keep the trip spontaneous and flexible. After arriving in the destination, these travellers may then talk to locals, other travellers or consult their guide book to plan where to eat, what to do or where to go next.

For those travellers that leave portions of their journey flexible to change, the opportunity exists for the local tourism industry to influence parts of their trip, potentially increasing length of stay and spend at the destination.

The focus of this research was to gain a better understanding of:

- destination touch points accessed in the Northern Territory
- their usefulness in encouraging bookings and/or purchase decisions for accommodation, food and dining, transport and activities/experiences
- their impact at different stages in visitors’ decision making/Northern Territory journey.

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#### Photo credits (in order of appearance)

Cover Image: Sounds of Silence, Uluru-Kata Tjuta National Park, NT  
Courtesy of Tourism NT

Rainbow Valley, Alice Springs, NT  
Courtesy of Tourism NT

Sightseeing around Darwin, NT  
Courtesy of Peter Eve and Tourism NT

Parap Markets with Jimmy Shu, Northern Territory  
Courtesy of Peter Eve and Tourism NT

The Ghan, courtesy of Tourism NT

## KEY MESSAGES

### 1. Experiences when walking around town can make or break the visit

This is what visitors do, particularly in regards to finding places to eat and activities to do. Therefore, it is important to maximise positive experiences for those walking around town.

### 2. Harness the power of friendly local advice

A Northern Territory holiday can be an exciting experience. However, it can also be daunting to some visitors, as their perceptions of the region are based on what they have seen in movies and documentaries. Travellers often look to locals for advice and as a way to connect. Encouraging locals to share their knowledge and experience will be a welcomed interaction.

### 3. Show people the Visitor Information Centre (VIC)

Visitors that dropped into a VIC tended to get out and do more, injecting more money into the local economy. This 'drop in', however, was not often planned. Better visibility and signposting is key to driving visitors into VICs.

### 4. Eating out and activities are experiences that drive satisfaction

Visitors saw activities such as riding the Ghan or having dinner outdoors as unique and unmatched Northern Territory experiences. Opportunities exist to ensure many more can enjoy these lasting memories through alignment with programs such as Tourism Australia's Restaurant Australia.

### 5. Accurate and easy to access information is vital

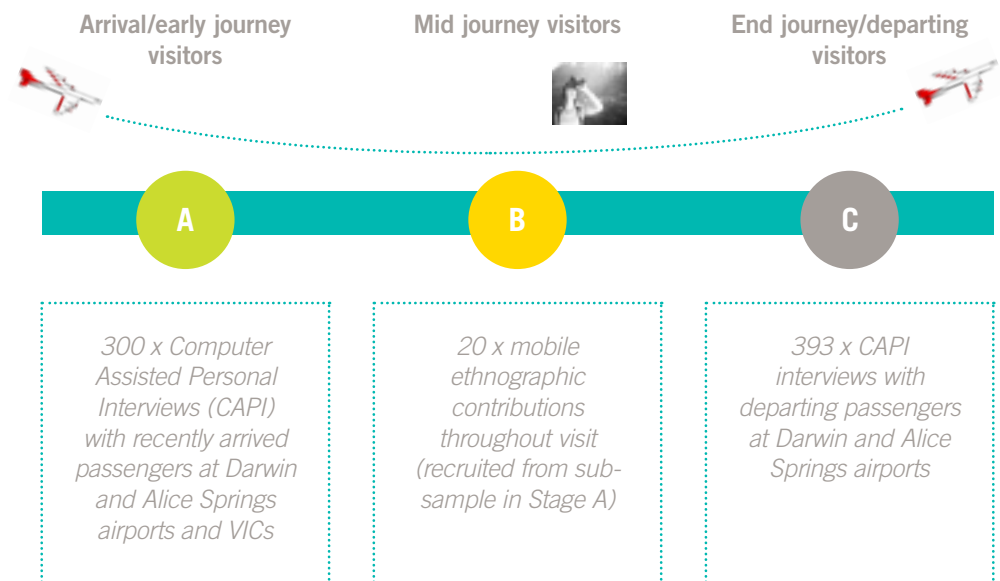
Some visitor expectations fell short when they could not find the information they needed or the information found was not helpful or up-to-date. To avoid these disappointments, businesses need to provide easy to access information which is a current and truthful depiction of their offer through a number of touch points.

## RESEARCH METHOD

Between April and June 2014, respondents at three stages of their journey (Figure 1) were interviewed in Darwin and Alice Springs. All were holiday decision-makers aged 18 and above, with their visit lasting between 2 and 14 days.

In the first and last stages, a similar number of respondents were interviewed in both localities with the sample split between interstate and international visitors. In the first stage, participants were also invited to contribute to the project throughout their trip to develop 'visitor postcards'. Visitors uploaded their photos and associated comments through a web portal to provide detail on the elements of their journey that had not been planned prior to arriving.

FIGURE 1: RESEARCH STAGES





Results from the initial phase indicated that newly arrived visitors to the NT were unlikely to be familiar with how to find information on products or services. Interviews with departing visitors, however, enabled a comprehensive picture of the touch points accessed and their perceived usefulness during their Northern Territory journey. It is these results that have been focused on most in this summary. Results from all stages are provided in the full report, available from [tourism.research@tra.gov.au](mailto:tourism.research@tra.gov.au).

### WHAT DESTINATIONS DID THEY VISIT?

Both Darwin and Alice Springs visitors tended to disperse beyond the destinations where they were interviewed. Overall, however, dispersal tended to be greater among visitors to Darwin (Figures 2 and 3).



FIGURE 2: WHERE VISITORS INTERVIEWED IN DARWIN SPENT TIME DURING THEIR TRIP

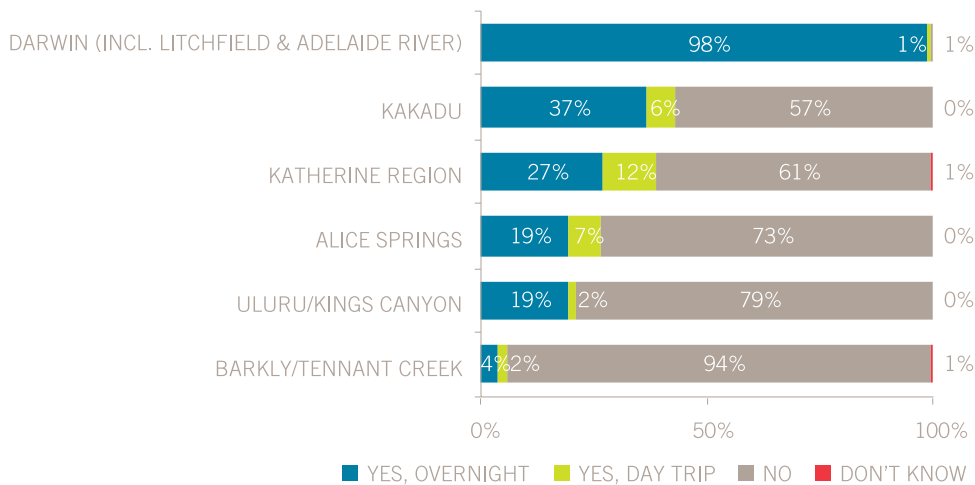
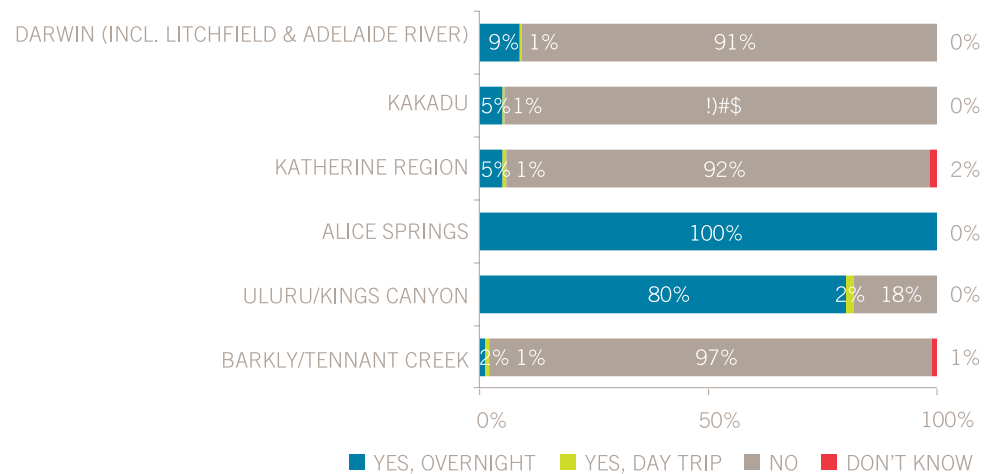


FIGURE 3: WHERE VISITORS INTERVIEWED IN ALICE SPRINGS SPENT TIME DURING THEIR TRIP

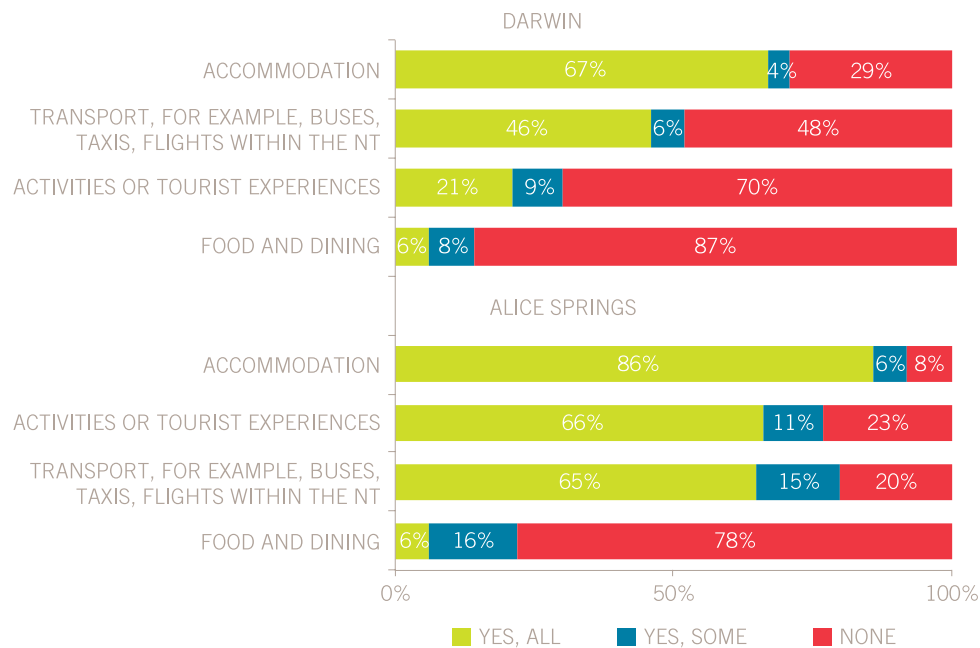


## WHAT ASPECTS OF THE HOLIDAY DID THEY PRE-PLAN?

Visitors to Darwin tended to leave more elements of their trip unplanned across all four tourism categories (Figure 4).

- Most visitors to Alice Springs (86%) and Darwin (67%) had already booked or planned their accommodation prior to arriving at the destination.
- Transport was also more likely to have been planned or booked prior to arrival.
- Those travelling to Alice Springs (66%) were three times more likely than those travelling to Darwin (21%) to fully plan their activities/experiences.
- A small proportion of visitors to Darwin (13%) and Alice Springs (22%) had made plans about where to eat prior to arrival.

FIGURE 4: PROPORTION OF TOURISM CATEGORIES PLANNED OR BOOKED BEFORE ARRIVAL

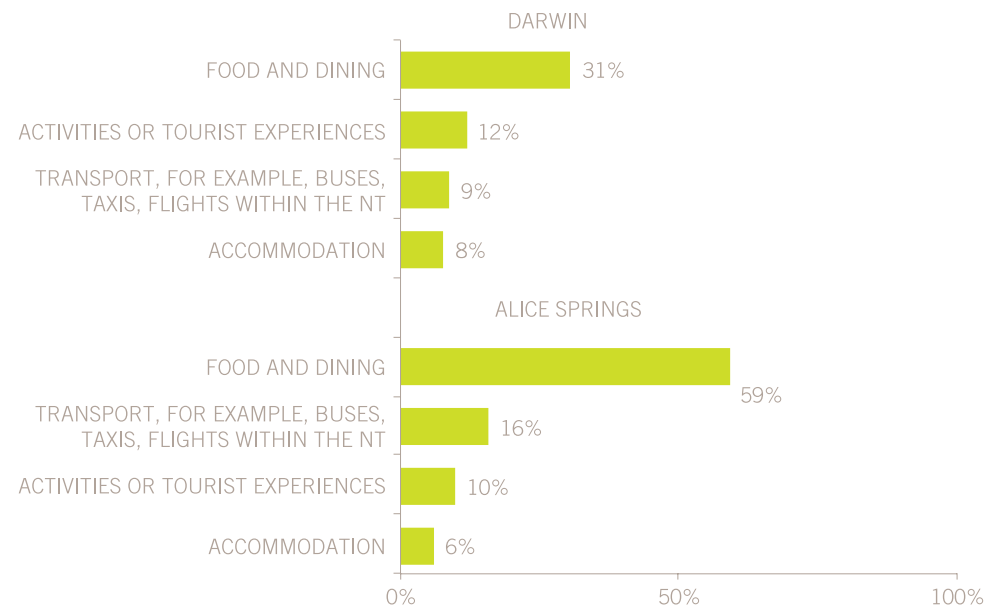


## DID VISITORS CHANGE ANY PRE-BOOKINGS AFTER ARRIVAL?

For the small number of people who pre-booked food/dining prior to arrival, sizeable proportions indicated changes at the destination (31% in Darwin, 59% in Alice Springs). Some visitors mentioned that they had booked or purchased food pre-trip, as not all meals were covered by the travel agent.

Relatively few visitors to Darwin and Alice Springs who had pre-booked accommodation, activities and transport, were likely to change their plans after arriving.

FIGURE 5: PROPORTION OF TOURISM CATEGORIES BOOKED OR PURCHASED AFTER ARRIVAL



## WHAT DID VISITORS BOOK OR PURCHASE AFTER ARRIVING?

In Darwin, 38% purchased 3.5 star and above hotel/motel accommodation after arrival. In Alice Springs, 39% purchased hostel accommodation, and 37% purchased 3.5 star and above hotel/motel accommodation after arrival (Table 1).

For food/dining, restaurant meals were the most common purchase (69%) for Darwin visitors, while eating at outdoor markets (44%) was also popular. Pubs/taverns (50%) were the most common establishments from which visitors to Alice Springs purchased meals. A higher proportion of visitors (72%) bought food from the supermarket to make their own meals in Alice Springs.

Around half the visitors to Alice Springs paid for a seat on a small shuttle bus (51%), or an organised tour (48%) to get around and/or see local attractions. In Darwin, 40% hired a car at the airport.

Daytrip and/or overnight tours were popular purchases after arriving in Alice Springs (48% and 45% respectively). In Darwin, only 29% of visitors made a purchase to go on a daytrip to an attraction.



TABLE 1: TOP TOURISM CATEGORY PURCHASE DECISIONS

DARWIN	%	ALICE SPRINGS	%
<b>ACCOMMODATION</b>			
Hotel/motel 3.5 stars and above	38	Backpacker hostel	39
Backpacker hostel	18	Hotel/motel 3.5 stars and above	37
Campground	10	Campground	8
<b>FOOD/DINING</b>			
Restaurant	69	Supermarket /self-prepared food	72
Café/food outlet	54	Restaurant	69
Supermarket / self-prepared food	52	Café/food outlet	60
Outdoor markets	44	Pub/tavern	50
<b>TRANSPORT</b>			
Hire car	40	Small shuttle bus	51
Taxi	33	Tour bus/tour coach (i.e. organised tour)	48
Tour bus/tour coach (i.e. organised tour)	24	Hire car & taxi	19 each
<b>ACTIVITIES/EXPERIENCES</b>			
Daytrip tour to attraction	29	Daytrip tour to attraction	48
Wildlife park, zoo, or wildlife experience	27	Overnight tour including accommodation	45
Paid theatre, cinema, live performance, museum	27	Walking or riding tour (town tour, rock tour etc.)	42

## WHAT KEY TOUCH POINTS WERE USED... AND HOW USEFUL WERE THEY?

In Darwin, the top three touch points used to influence or help make a purchase decision were walking around town (35%), websites of providers (17%) and face-to-face travel agents (12%) (Figure 6).

Results were similar for Alice Springs with walking around town top of the list at 30%. However, face-to-face travel agents was the next most used touch point (25%), followed by online travel agents (17%) such as Wotif and Expedia.

Using recommendations from locals, friends and/or other travellers was more prominent for visitors to Alice Springs (30%) than Darwin (19%).

Few visitors used brochures picked up at businesses or VICs.

FIGURE 6: VISITOR TOUCH POINTS

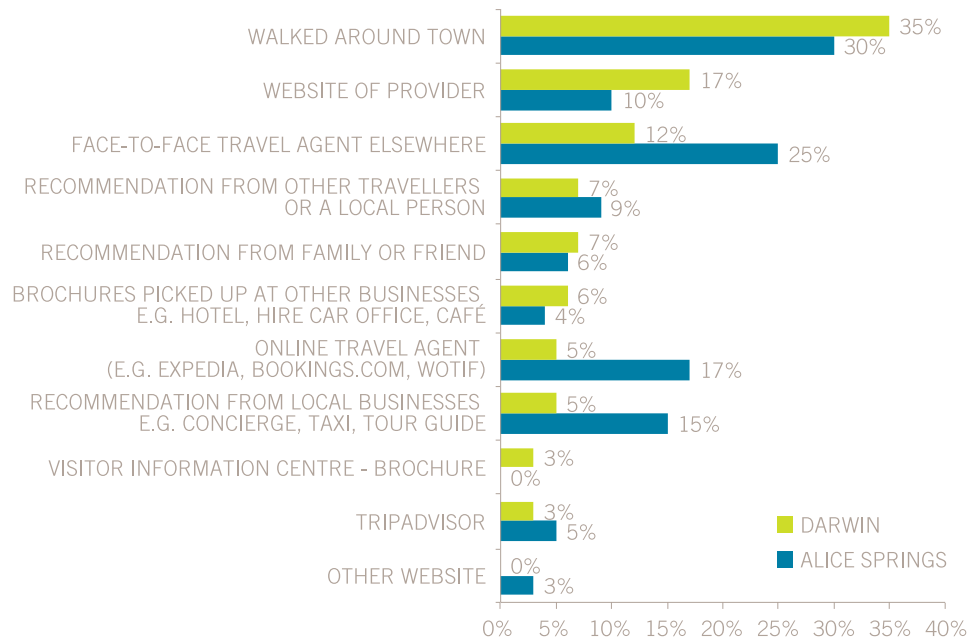


TABLE 2: MAJOR TOUCH POINTS AND THEIR RATED USEFULNESS\*

DARWIN	% used	% useful*	ALICE SPRINGS	% used	% useful*
<b>ACCOMMODATION</b>					
Website of provider	32	41	Face-to-face travel agent	27	65
Face-to-face travel agent	20	51	Online travel agent	23	66
Online travel agent	14	46	Website of provider	19	55
<b>FOOD/DINING</b>					
Walk around town	70	47	Walk around town	64	47
Recommendation from other travellers or local	11	67	Recommendation from local business e.g. concierge, guide	24	66
			Recommendation from other travellers or local	16	70
			Face-to-face travel agent	15	85
<b>TRANSPORT</b>					
Website of provider	26	59	Face-to-face travel agent	29	77
Walked around town	25	61	Walk around town	21	67
Face-to-face travel agent	17	59	Recommendation from local business e.g. concierge, guide	15	86
			Online travel agent	15	67
<b>ACTIVITIES/EXPERIENCES</b>					
Walked around town	37	64	Face-to-face travel agent	32	75
Brochures picked up at businesses e.g. hotel	15	32	Walk around town	32	64
			Online travel agent	20	73
			Recommendation from local business e.g. concierge, guide	13	79

\* % rating 9-10 (top 2 box)



Key points for each tourism category:

- **Accommodation** – Websites of providers and usage of travel agents (both face to face and online) were the most used touch points. However, a higher proportion of visitors departing from Darwin than Alice Springs had used the websites of providers. Alice Springs visitors were more likely to rate highly the usefulness of the main accommodation touch points used.
- **Food/dining** – Word of mouth was the most used touch point by visitors who departed NT from Darwin and Alice Springs. However, when experienced, the usefulness of recommendations from locals, other travellers and/or businesses were more likely to be rated highly than ‘walking around town’.
- **Transport** – Visitors departing from Alice Springs were more likely to have used a face-to-face travel agent for transport options, while direct-to-provider website usage was most prominent for those visitors that departed from Darwin. When used, recommendations from local businesses were most likely to be rated highly by visitors departing from Alice Springs. Visitors departing from Darwin rated the usefulness of the touch points they most commonly used similarly.
- **Activities/experiences** – ‘Walking around town’ was the key stimulus for activities/ experiences in Darwin. While also important for Alice Springs, these visitors had also commonly used face-to-face and online travel agents before arriving in the Northern Territory. Nearly two-thirds of those departing Darwin and Alice Springs rated the usefulness of walking around town highly. However, for Alice Springs, recommendations from local businesses, face-to-face and online travel agent advice were more likely to be rated highly useful than walking around town.

## WHICH OF THE TOUCH POINTS PRESENT OPPORTUNITIES?

### WALK AROUND TOWN

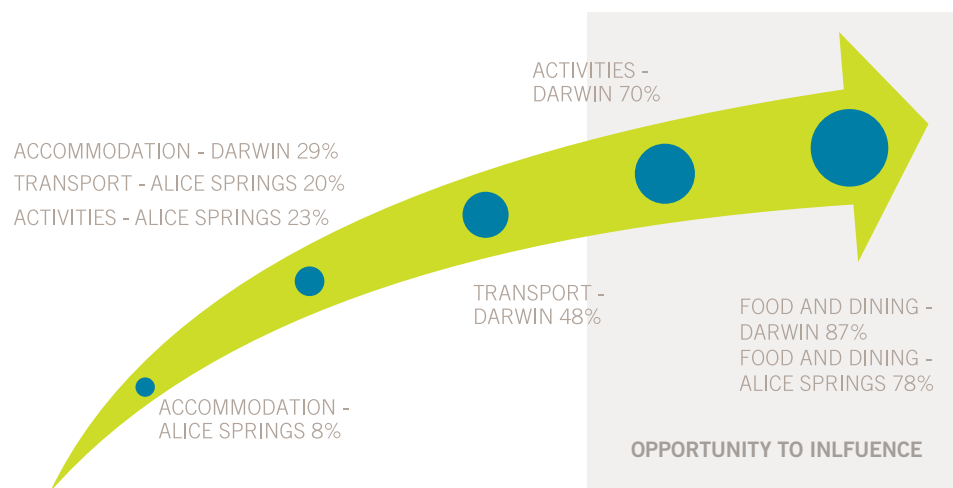
Visitors to the Northern Territory enjoy walking around town to find where to eat and what to do. When there is a positive experience, this leads to highly satisfied visitors who are more likely to recommend the Northern Territory as a tourist destination to others after their visit. Visitors also have a strong appreciation for any guidance that can be provided as they walk around town.

#### Recommendation

Businesses in the Northern Territory need to develop strategies that provide direction to visitors who prefer to walk around town to find places to eat and activities. Facilitating personal exploration by linking areas/precincts or activities through themed tours or maps can provide greater satisfaction. These themes could be, but are not limited to: local arts; food; kids; Indigenous; parks; treks; night time; and WWII. This would require clearly visible signposts that aid in discovering these precincts. Visitors need to be shown where the hidden gems are. Places like the Waterfront precinct in Darwin, with its food and dining options, may not be as obvious to visitors as the iconic Darling Harbour in Sydney.



FIGURE 7: TOURISM EXPERIENCES BY LOCALITY THAT PRESENT OPPORTUNITIES TO INFLUENCE



## RECOMMENDATIONS FROM OTHERS

Recommendations from Northern Territory locals are most useful to facilitating purchases, but are only achieving moderate usage levels in Alice Springs and lower levels in Darwin. It is clear that the people of the Northern Territory come across as being friendly, open and helpful in nature as well as being enthusiastic and excited for the visitors' experience. It is the connections with locals that can lead to many unplanned purchases. As confirmed by the online ethnography phase, visitors are receptive, welcoming and open to engaged local input on their journeys.

### Recommendation

Locals—businesses, guides or individuals—should be encouraged to become ambassadors for the Northern Territory. This is a controllable touch point where the community has permission to promote the Northern Territory through genuine connections.

Major events such as V8 Supercars and the World Solar Challenge offer an opportunity to develop a formal approach to this, much like the volunteer program for Sydney Olympics where *'locals there to help YOU'* was clearly identifiable. When it comes to the Northern Territory, the person is often also the experience. This example has the potential to further boost advocacy of the Northern Territory as a tourist destination, and maximise the longer term economic impact of major events.

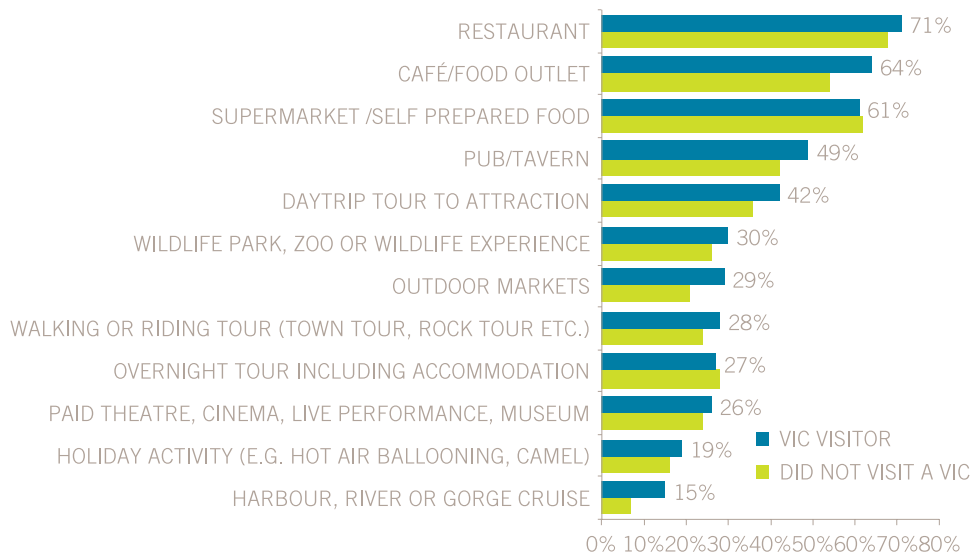
## VISITOR INFORMATION CENTRES

At the beginning of their trip, more than one-quarter (or 28%) of visitors interviewed at a VIC indicated it was an 'accidental visit'. When prompted, most of these visitors said they were 'just walking by'.

Among departing visitors, around one-third (32%) visited a VIC during their stay (29% in Alice Springs, 34% in Darwin). Brochure pickup (74% Alice Springs, 89% Darwin) and staff interaction (62% Alice Springs, 65% Darwin) were the most common experiences. Overall, 60% of visitors were very satisfied (rating 9-10) with their VIC visit, and this satisfaction was driven by the quality of information provided and the helpfulness of staff.

Visitors to VICs tended to spend across a greater number of food and activity types than those who did not go to a VIC (Figure 8).

FIGURE 8: ACTIVITIES UNDERTAKEN BY VISITORS WHO WENT TO A VIC AND THOSE WHO DIDN'T



**Recommendation**

It is clear that visitors to VICs had a high level of satisfaction and tended to eat out more and do more things. To address the issue of visitors only coming into a VIC as they passed by, visibility and signposting of the VIC must be improved. Driving more visitors to VICs will not only increase visits into the VIC itself, but will also positively influence visitor spend and length of stay at a destination.

**ONLINE TRAVEL AGENTS AND PROVIDER WEBSITES**

Visitors regularly used online sources (travel agents and/or website providers) in relation to accommodation, transport and/or activities/experience (Alice Springs only). The usefulness of these touch points was rated highly by a large majority of Alice Springs visitors and a sizeable share of Darwin visitors.

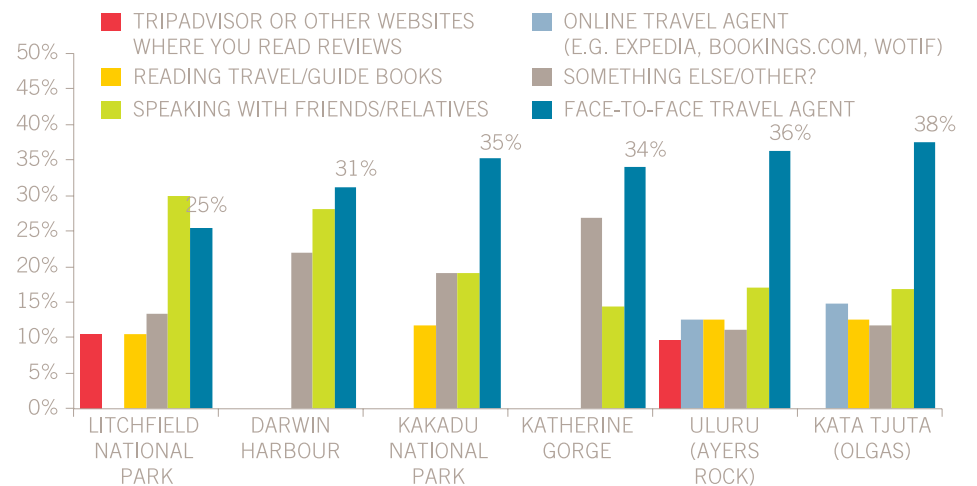
As a way to find out more about a destination while in location, these results demonstrate the continued importance of providing mobile friendly websites along with access to free Wi-Fi within towns/city centres and accommodation.

**FACE-TO-FACE TRAVEL AGENTS**

For those visitors interviewed in Alice Springs, face-to-face travel agents were one of the most highly used and useful of all touch points when it came to making bookings and/or planning across all four tourism experiences (Table 2). In Darwin, their use was limited to finding accommodation and transport.

As Figure 9 shows, they were also a particularly important information source for visitors to find out about a number of key tours offered in the Northern Territory.

FIGURE 9: INFORMATION SOURCES FOR KEY TOURS OFFERED IN THE NORTHERN TERRITORY



## WHAT DID VISITORS SAY ABOUT THEIR EXPERIENCES AND UNPLANNED PURCHASES?

In the mobile ethnography phase, respondents provided a window into their stay and touch point experiences, through the commentary and associated photos they kept. Their comments showed a strong connection with the insights emerging from the other phases of research. They also identified elements of their visit that fell short of expectations.

### ■ Personalities, conversations and authenticity

One key theme highlighted was the high level of visitor satisfaction associated with authentic connections with businesses, guides or locals while on their trip. Visitors appreciated guidance from locals who were passionate and generous with their time. The people of the Northern Territory came across as being friendly, open and helpful in nature, as well as being enthusiastic and excited for the visitors' experience.

*"In Alice Springs, [the person] at the Info Centre was great! [They] patiently answered all my questions, made calls, got me the best rates and gave me the printouts". (International visitor, female, 53, first visit to NT)*

### ■ Unique and unmatched experiences

Activities were also a key highlight of the visit as they were considered unique and unmatched by any other holiday destination. Money spent on activities that visitors hadn't expected to be able to experience left a highly positive lasting memory. An example of this can be found in the visitor postcard (Figure 10).

*"The guys who ran the Kings Canyon helicopter flight were very helpful and knowledgeable. We thought it was a bit expensive for a family ... but it was worth it!" (International visitor, female, 18, first visit to NT)*

A number of positive comments were made in relation to experiences with transportation including: having the opportunity to ride the Ghan or motorbike as an experience in itself; having an enjoyable tour bus experience with staff going above and beyond; and using available transport options to ensure they don't miss out on iconic moments such as watching the sunset over Uluru on the back of a camel.

*"We were on a motorcycle holiday and rode through to Ubirr. The paintings took our breath away. Marvellous to behold, crossing the water on the bike nearly took our breath away also!" (International visitor, male, 50, visited before).*

Satisfaction also came from highly positive food experiences. Comment-worthy experiences included Sounds of Silence, dinner cooked over the campfire, and picnics in the sun, all with the Northern Territory's unmatched landscape, providing an opportunity to 'wow'.

*"What an amazing holiday! Sounds of Silence for my birthday dinner at Uluru was a definite highlight". (Domestic visitor, female, 61, visited before)*





## Recommendation

Food definitely made an impact on the whole visitor experience. With the opportunity to influence those walking around, there is clearly a need to develop an eating out strategy so that visitors can easily find places to eat at each destination. The strategy should also complement Tourism's Australia's broader recent developments with Restaurant Australia.

FIGURE 10: POSTCARD FROM ETHNOGRAPHIC PHASE DEMONSTRATING POSITIVE TOUCH POINT EXPERIENCE



## ■ Accurate and easily available information

Comments were also made which identified that expectations were sometimes not being met due to a lack of information and/or misleading touch points or information sources.

When information was not easily available, or attempts to use touch points were not effective, this led to visitor expectations falling short.

*"I tried to speak with a staff member at a [service station] and they could not really help me out, being so remote it helps to have staff who know the area and what to expect. We were not really happy with the service and because of that we did not purchase fuel from the service station". (International visitor, male, 32, first visit to the NT)*

Misleading touch points and information sources also led to visitors being disappointed and led to missed opportunities in some cases.

*"Hotel was not what it said on website. The facility had things that didn't work. Moved us twice". (Domestic visitor, female, 69, visited before)*

*"We were not informed of free things to do or visit [by tour guide]". (International visitor, female, 27, visited before)*

## Recommendation

Visitors want to immerse themselves on their holiday and information facilitates this need. However, they can easily feel 'exposed' in the Northern Territory with any information gap and/or feel let down when information given to them is misleading or not up-to-date. To avoid these issues, businesses must provide accurate, truthful and current information that is easy to access through a number of touch points in the destination.



## CONCLUSION

Findings from the research suggest five core recommendations that will enable Northern Territory tourism operators to better harness where and how visitors access information.

1. Develop strategies providing direction to visitors walking around town to find places to eat and activities to do.
2. Encourage locals—businesses, guides or individuals—to be ambassadors for the Northern Territory.
3. Increase visibility and improve signposting to direct visitors to the Visitor Information Centres.
4. Align unique Northern Territory qualities—especially food experiences—with programs such as Tourism Australia’s Restaurant Australia.
5. Provide easy to access, current and truthful information through a number of touch points to prevent visitor expectations falling short.

These recommendations all offer potential to boost spend and increase length of visit.

Furthermore, the research indicates that there are opportunities to influence visitors’ holiday decisions after they have arrived in the Northern Territory at all levels. While touch points offer a greater chance to influence where people eat and what they do, they also offer opportunities in the areas of accommodation and transport.

It is also clear that visitors have preferences when it comes to which touch points they will access to help in making holiday decisions. These include: walking around town; using websites of providers; getting recommendations from others; and face-to-face travel agents.

The Northern Territory possesses a number of unique and unmatched experiences along with friendly locals and a relaxed atmosphere. Supporting visitors with the information they need to make important holiday decisions ensures these qualities have the greatest impact on visitor satisfaction, leave lasting memories and drive positive word of mouth.