

# RTO Member Satisfaction Survey 2022

## Summary Report: Australia's Golden Outback

22<sup>nd</sup> February 2023

Prepared by Painted Dog Research



# What did we set out to do?

## **STRATEGIC AIM:**

To provide Australia's Golden Outback (AGO) with a holistic view of their perceived performance amongst members to help inform future strategic and marketing decisions.

## **SPECIFIC OBJECTIVES:**

1. Measure the opinions held by members regarding Australia's Golden Outback and their perceived value of membership.
2. Analyse Australia's Golden Outback's performance across primary areas of focus, including facilitation and opportunities, region awareness and marketing and communication.
3. Evaluate Destination Perth's unique stated drivers for membership value and sign up.



# Quick methodology snapshot...

## 1 Approach

- Fieldwork was conducted **from November 10<sup>th</sup> 2022 to January 4<sup>th</sup> 2023.**
- This is the fifth wave of this research; with previous waves occurring in 2014, 2018, 2019 and 2021.
- This is the second wave that the survey has been conducted by Painted Dog Research, with prior research run by another agency.
- Where relevant, historic results have been used to draw attention to trends. Comparisons between historic waves have been significance tested at the 95% confidence level.

## 2 Representativeness

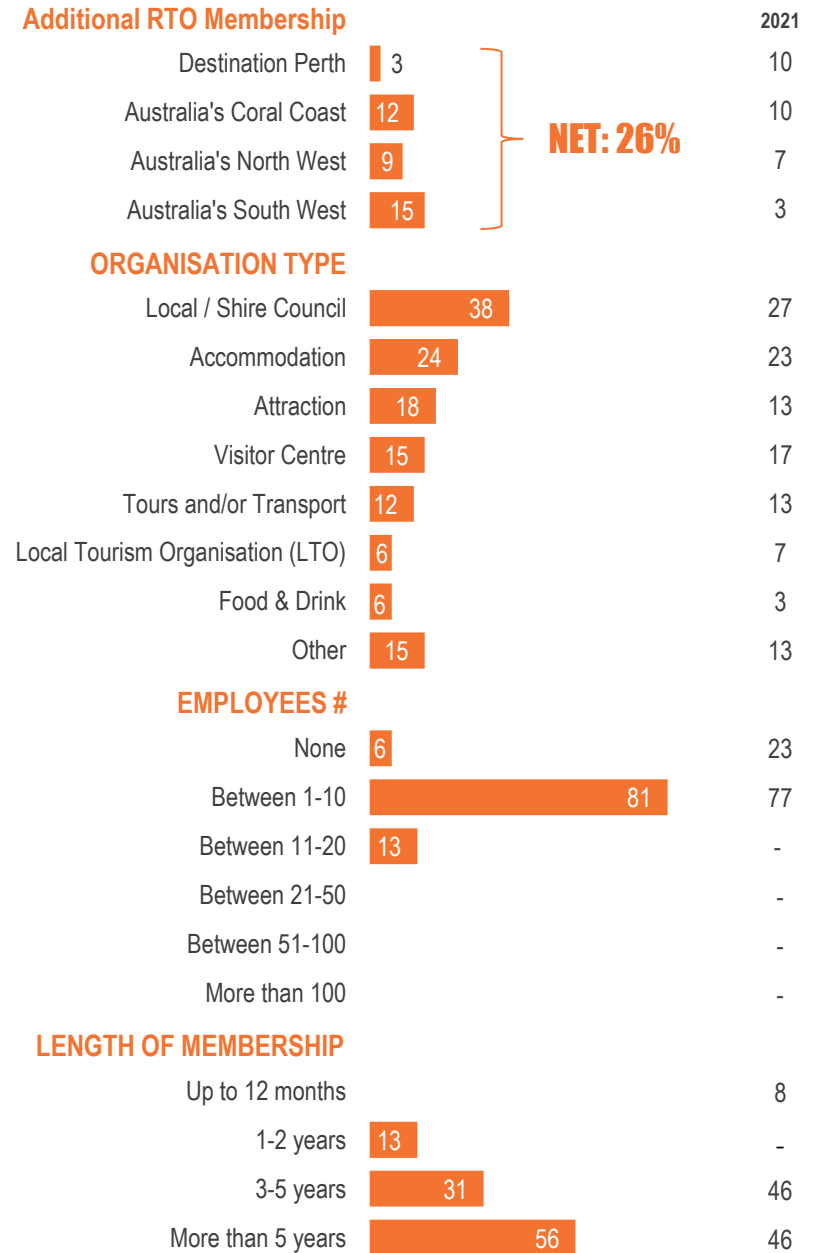
- Using provided contact lists, online survey invites were emailed by Painted Dog to a total of n=875 unique members. Of the n=875 unique members, n=128 came from Australia's Golden Outback's provided list.
- In total, n=205 completed the RTO member survey. Of these, n=34 are members of Australia's Golden Outback.

## 3 Significance & Analysis

- Significance is tested at the 95% confidence interval.
- Differences between sub-groups are indicated by stars:
  - ★ Significantly higher
  - ☆ Significantly lower
- Differences over time (between waves) are indicated by arrows:
  - ▲ Significantly higher
  - ▼ Significantly lower
- All figures reported are percentages, unless otherwise stated.
- Some percentages may not add to 100% due to rounding or multi-response type questions.

# Sample Profile – Australia's Golden Outback

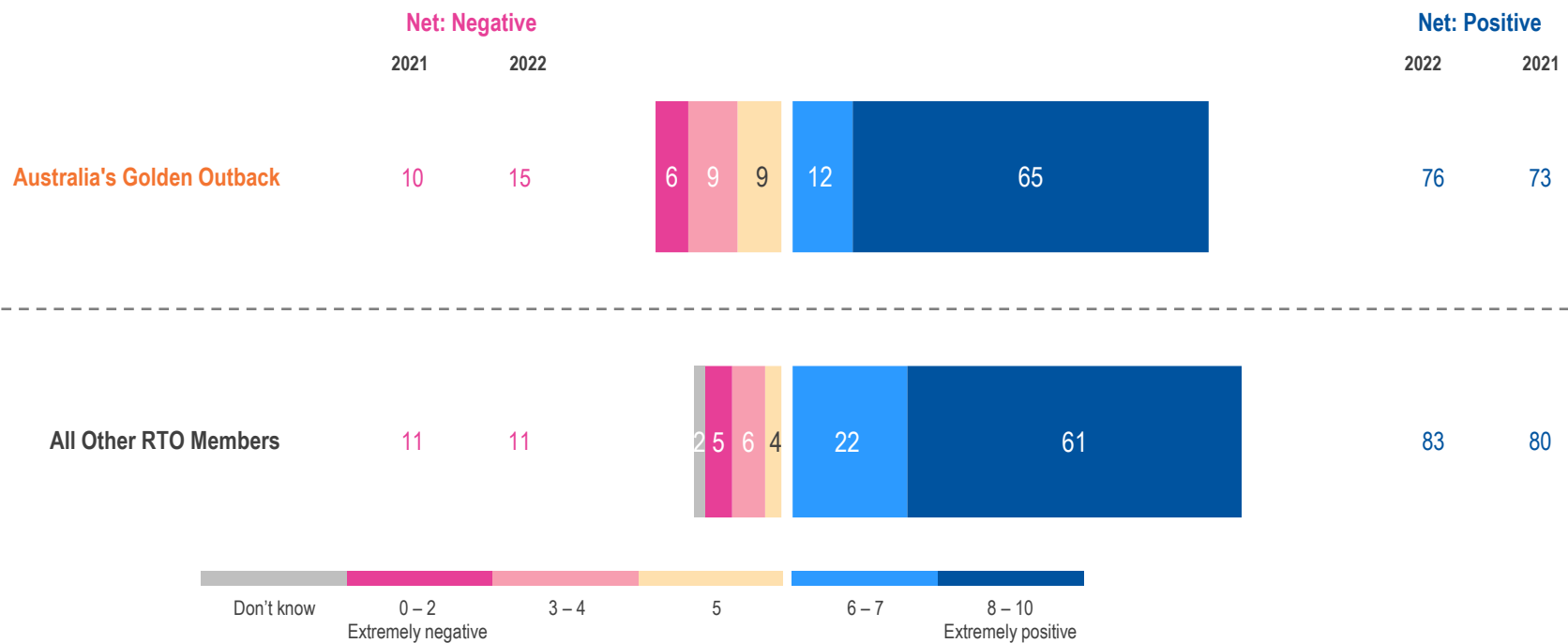
n=34 survey responses were collected from AGO members. A quarter of AGO's members also hold memberships to other RTOs.



# Member Registration, Overall Performance & Value



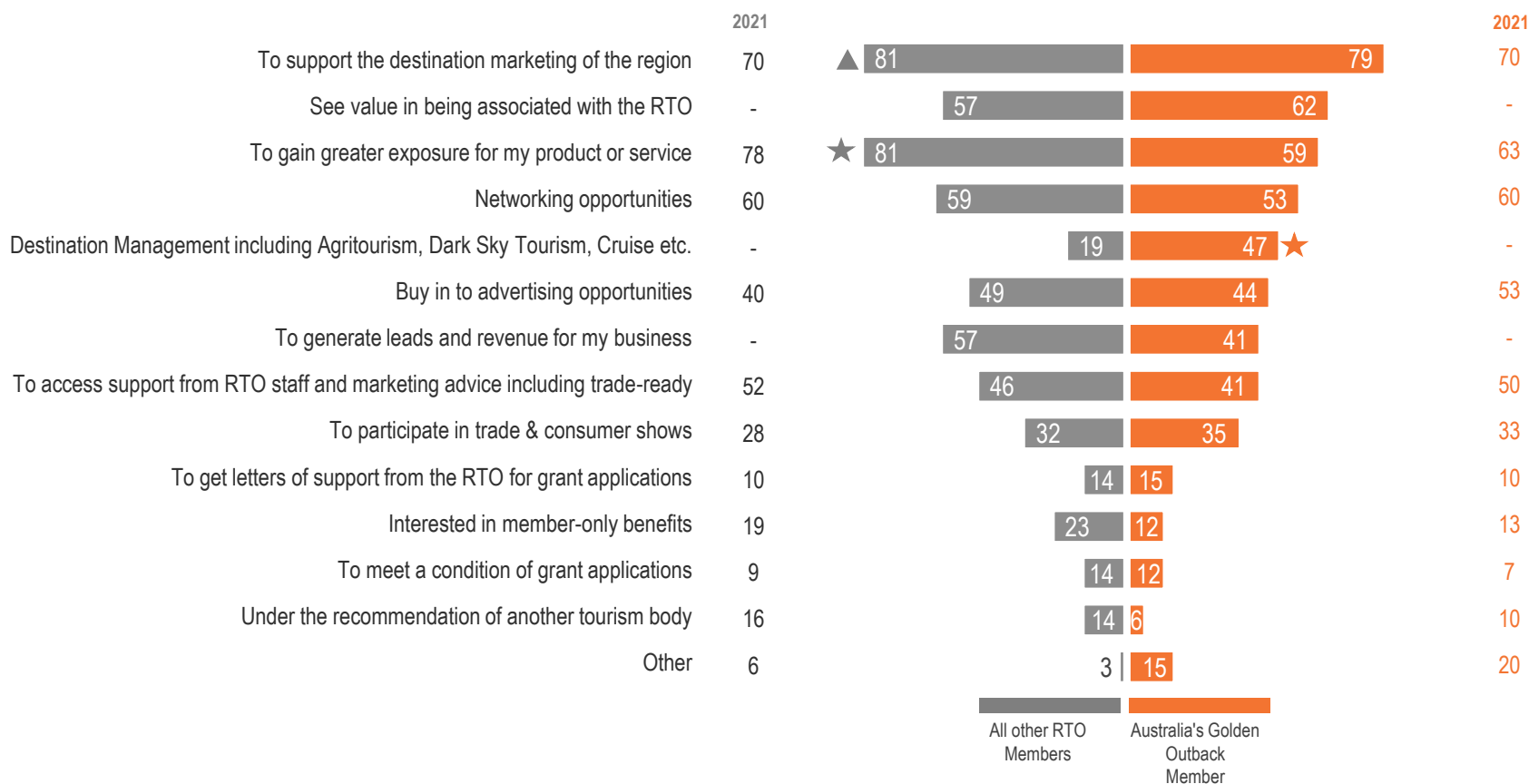
Two in three AGO members have an 'extremely positive' opinion of their RTO.



Q10. Thinking about all your interactions in the past 12 months with your RTO and what you know about its activities and functions within your region, what is your overall opinion of your RTO? Base: 'AGO Members' 2021 (n=30), 2022 (n=34); 'All Other RTO Members 2021' (n=193); 2022 (n=171)

# Support for destination marketing remains the top reason for becoming a member.

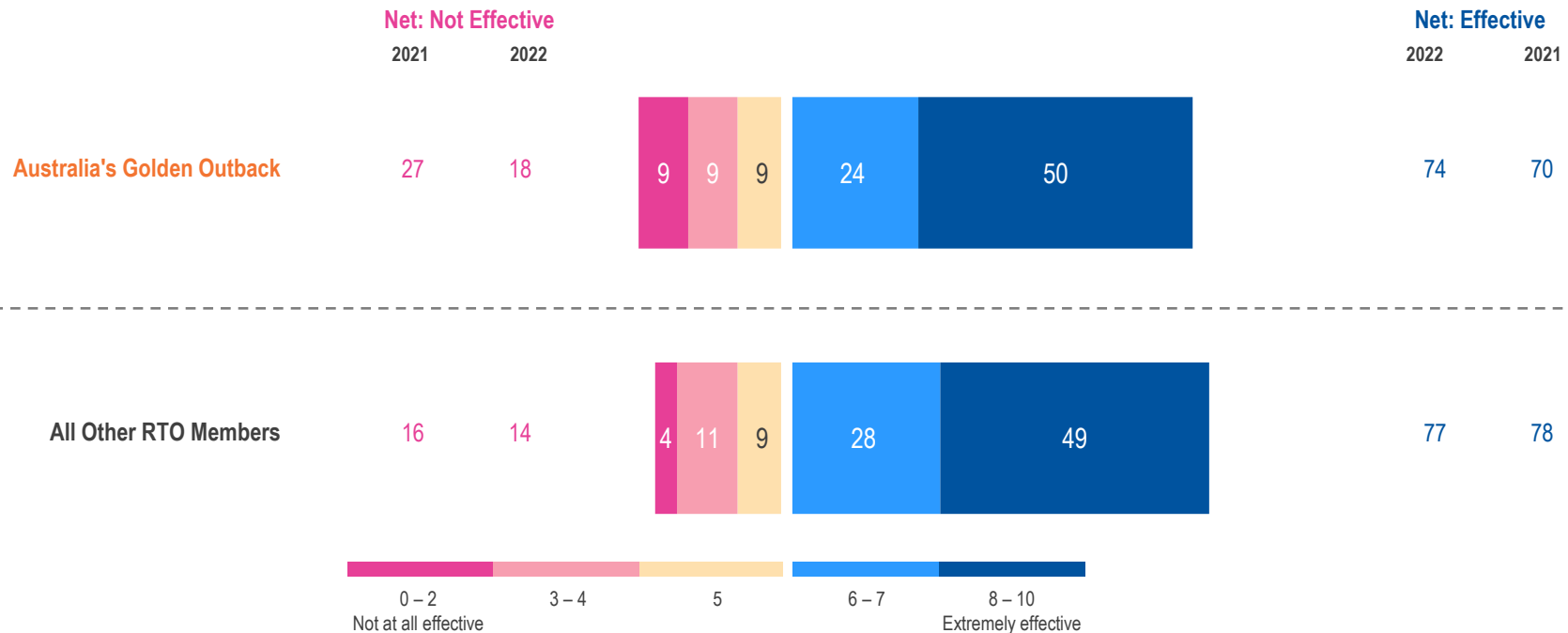
Members from other RTOs are significantly more likely to have joined their RTO for the purpose of gaining greater exposure of their products and services. Conversely, members from AGO are significantly more likely to have joined for destination management purposes.



Q7. Why did you become a member of your RTO? Base: 'AGO Members' 2021 (n=30), 2022 (n=34); 'All Other RTO Members' 2021 (n=193); 2022 (n=171)

Three quarters believe that AGO's destination marketing of the region has been effective.

The number of AGO members who indicated the destination marketing of the region was not been effective dropped notably this wave, from 27% to 18%.



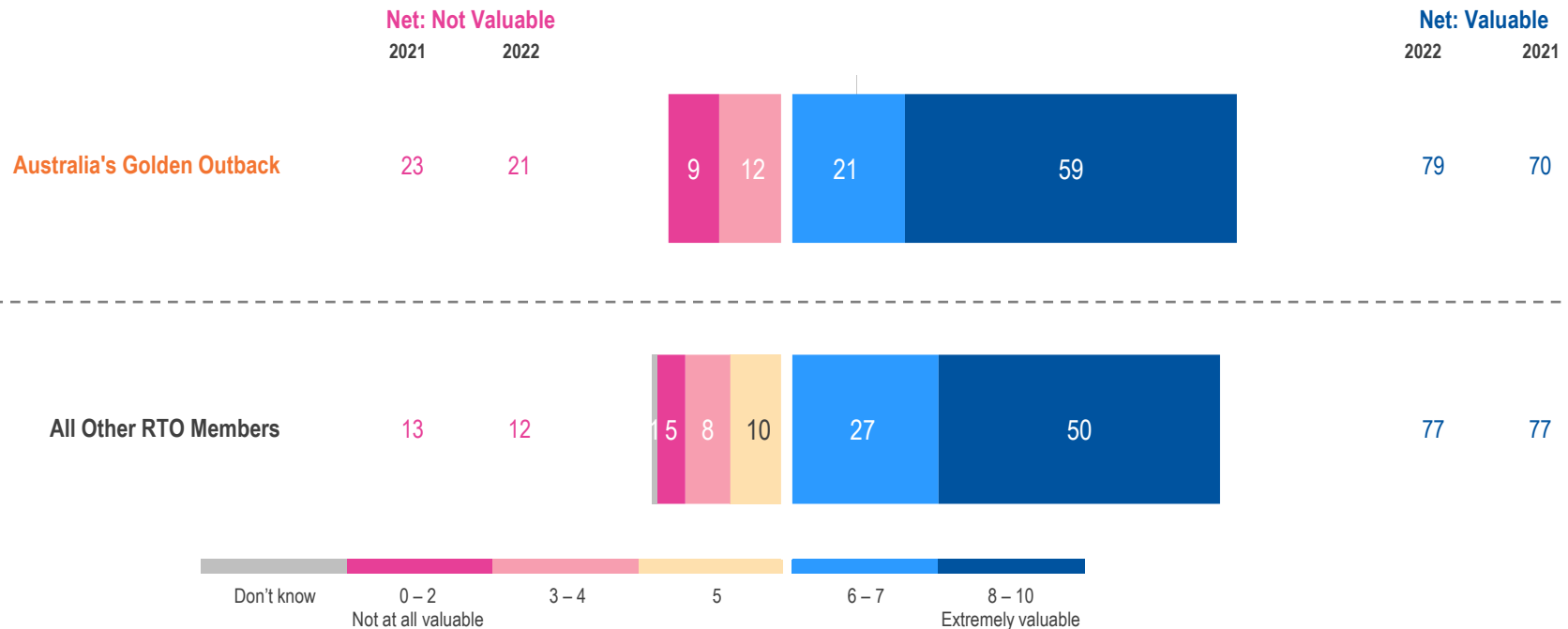
Q11. One of the key roles of your RTO is to promote the region your business operates in. Overall, how effective do you believe your RTO's destination marketing has been in the last 12 months? Base: 'AGO Members' 2021 (n=30), 2022 (n=34); 'All Other RTO Members' 2021 (n=193); 2022 (n=171)



Four fifths of AGO's members consider their membership to be valuable...

...with the majority of those finding their membership to be 'extremely valuable'.

Interestingly, all AGO's members that don't think their membership is valuable consider it as not valuable; no AGO members selected 5 out of 10 or 'don't know'.



# In their own words...



Ongoing open and strong relationship with AGO.

**Local Shire, Gold**



I believe my membership pays for itself with the amount of additional revenue raised through bookings made following campaigns of awareness.

**Accommodation, Gold**



Support for coop marketing activities where none would otherwise be available due to budget constraints in Wheatbelt LTO's.

**Visitor Centre, Gold**



I have been very impressed with the support that has been given, that it is easily accessible and really encouraging for my business

**Attraction, Silver**



I see a lot of value being a member including the collaboration opportunities for marketing and promotion, networking opportunities, visitor information, industry updates and how it relates to the AGO region.

**Local Shire, Gold**



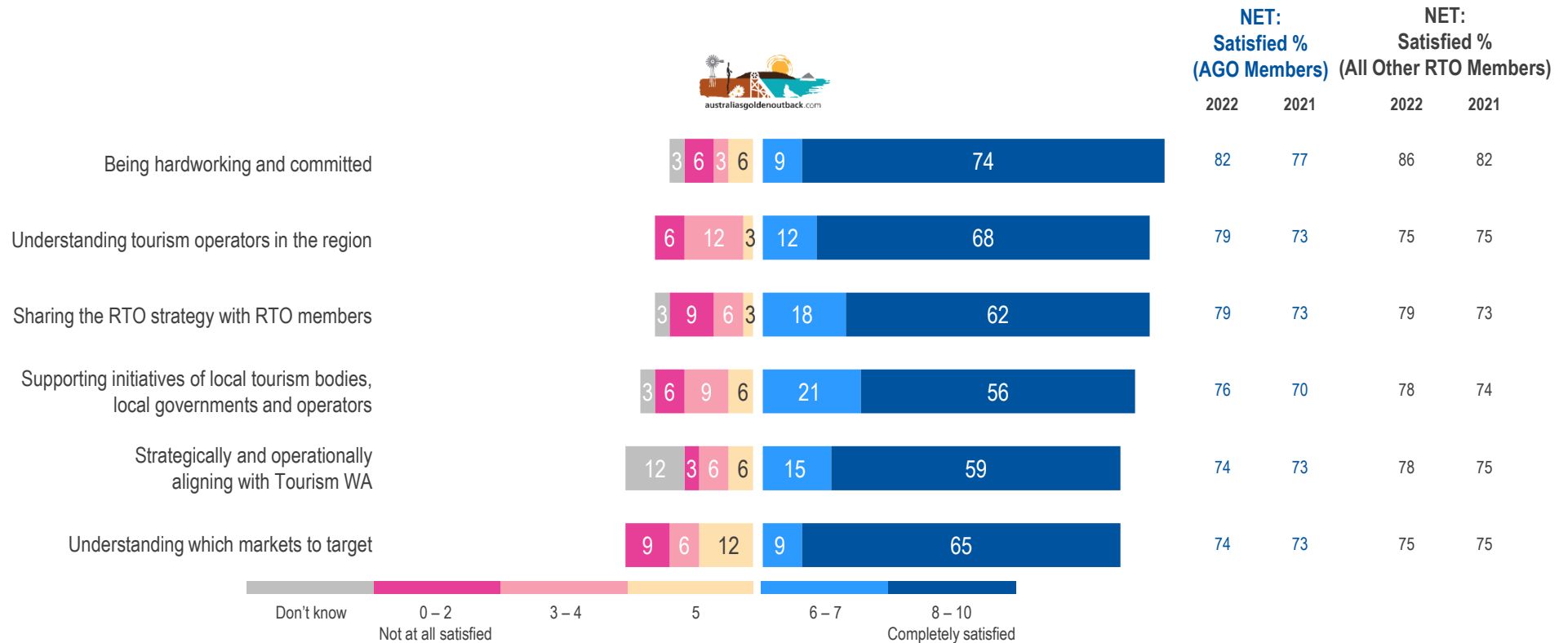
# Other Key Performance Metrics



Three quarters of members are 'completely satisfied' with AGO staff's hard work and commitment.

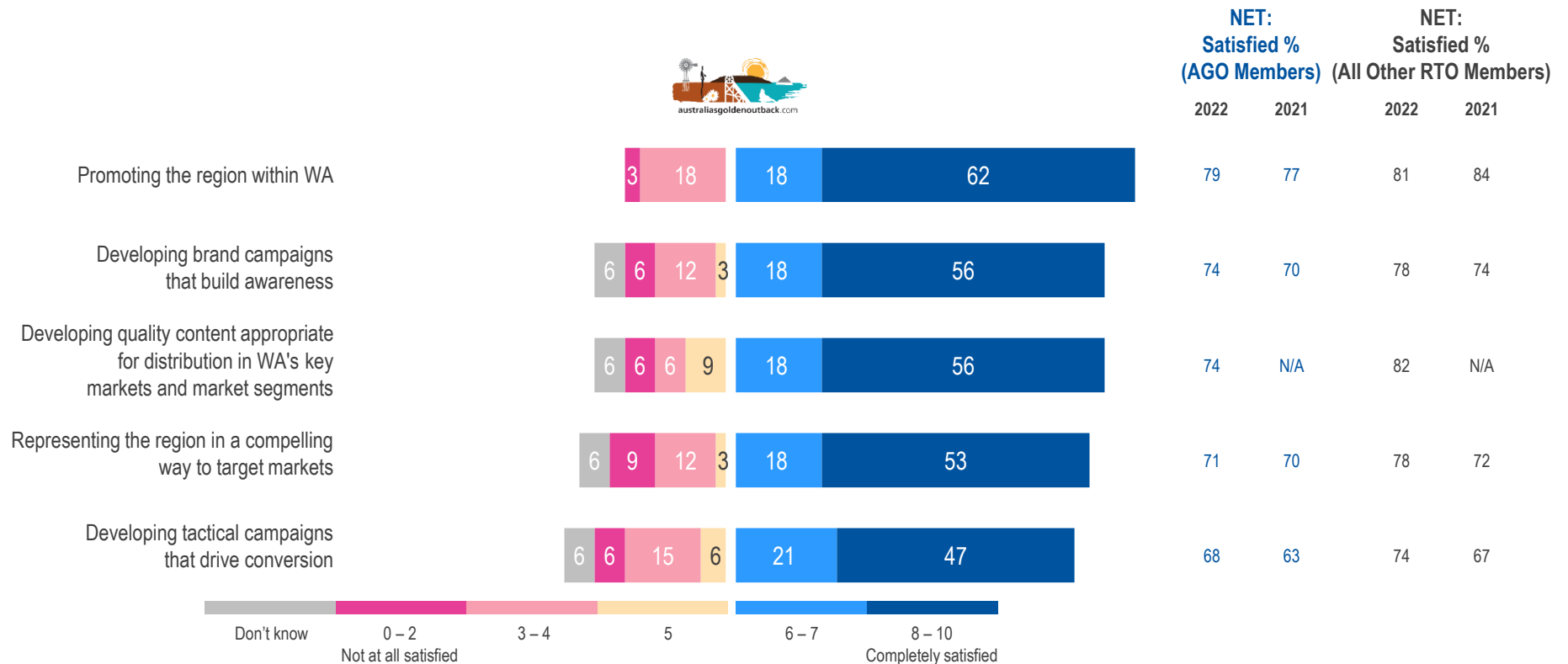
Satisfaction across AGO's core operations is strong, with minor gains made wave-on-wave across all metrics.

There are no significant differences between AGO members and non-AGO members across all operational metrics.



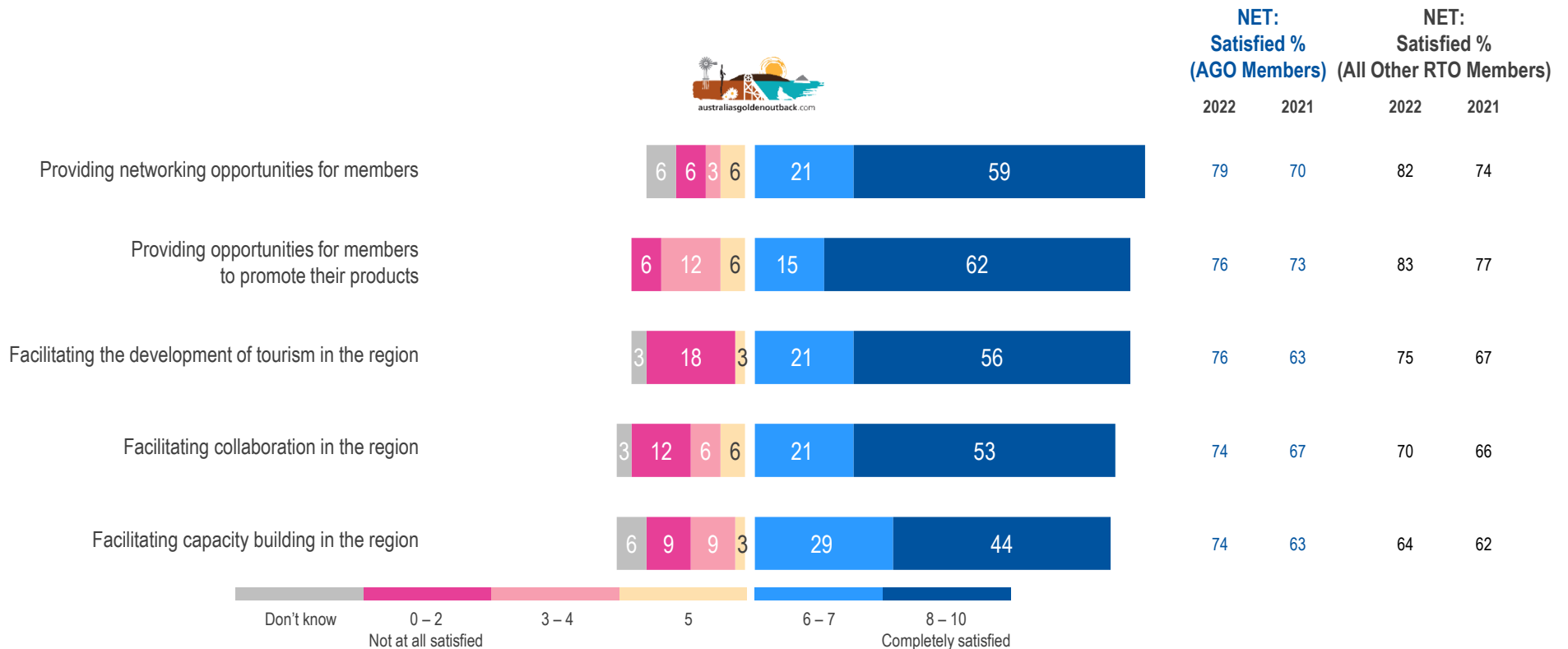
# Satisfaction with marketing efforts remains high.

The results between AGO members and members from other RTOs is again similar and sees no significant differences.



Q14. Thinking about the extent to which your RTO is helping to build awareness of the region, how satisfied are you with how your RTO has performed in each of the following in the past 12 months? Base: 'AGO Members' 2021 (n=30), 2022 (n=34); 'All Other RTO Members' 2021 (n=193); 2022 (n=171)

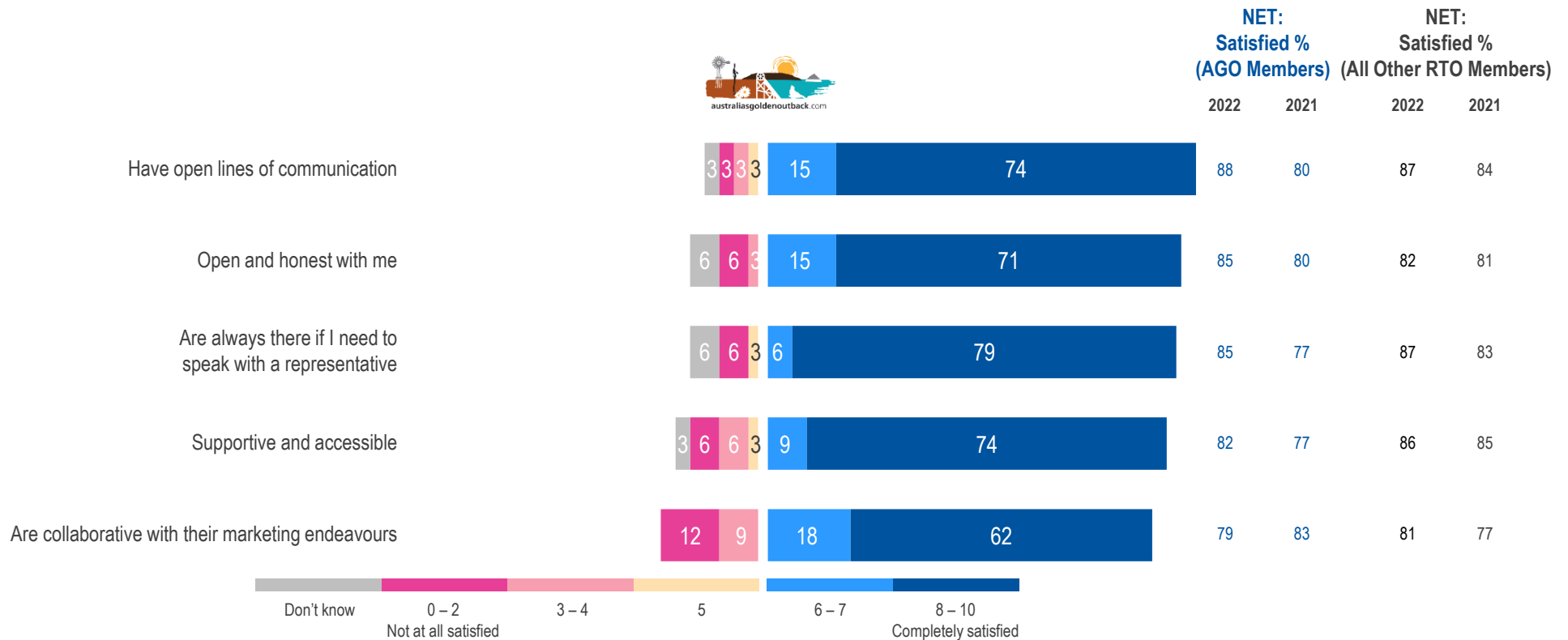
There have been improvements across all industry support metrics this wave.



Q15. Thinking about the extent to which your RTO is supporting the local industry and operators, how satisfied are you with how your RTO has performed in each of the following in the past 12 months? Base: 'AGO Members' 2021 (n=30), 2022 (n=34); 'All Other RTO Members' 2021 (n=193); 2022 (n=171)

AGO's performance across all communication and relationship metrics is outstanding.

At least four in five are satisfied across all metrics, the majority across each being 'completely satisfied'.



Q16. Thinking about your relationship with your RTO in the past 12 months, how satisfied are you with each of the following? Base: 'AGO Members' 2021 (n=30), 2022 (n=34); 'All Other RTO Members' 2021 (n=193); 2022 (n=171)

# Australia's Golden Outback: Specific Question on Business and Region Development





AGO members are looking for further marketing and content support to help their business and region.

Further, members request direct collaboration with AGO in the development of the region, and further for AGO to work collaboratively with other government bodies (such as tourism WA) in their development of the region.

Interestingly, several members referenced AGO's strategic plan and were directly encouraging of AGO continuing their current efforts.



Provide opportunities to collaborate on marketing and trade events to reduce costs of doing these as stand alone events. This also provides the chance to develop a strong brand narrative and destination development.

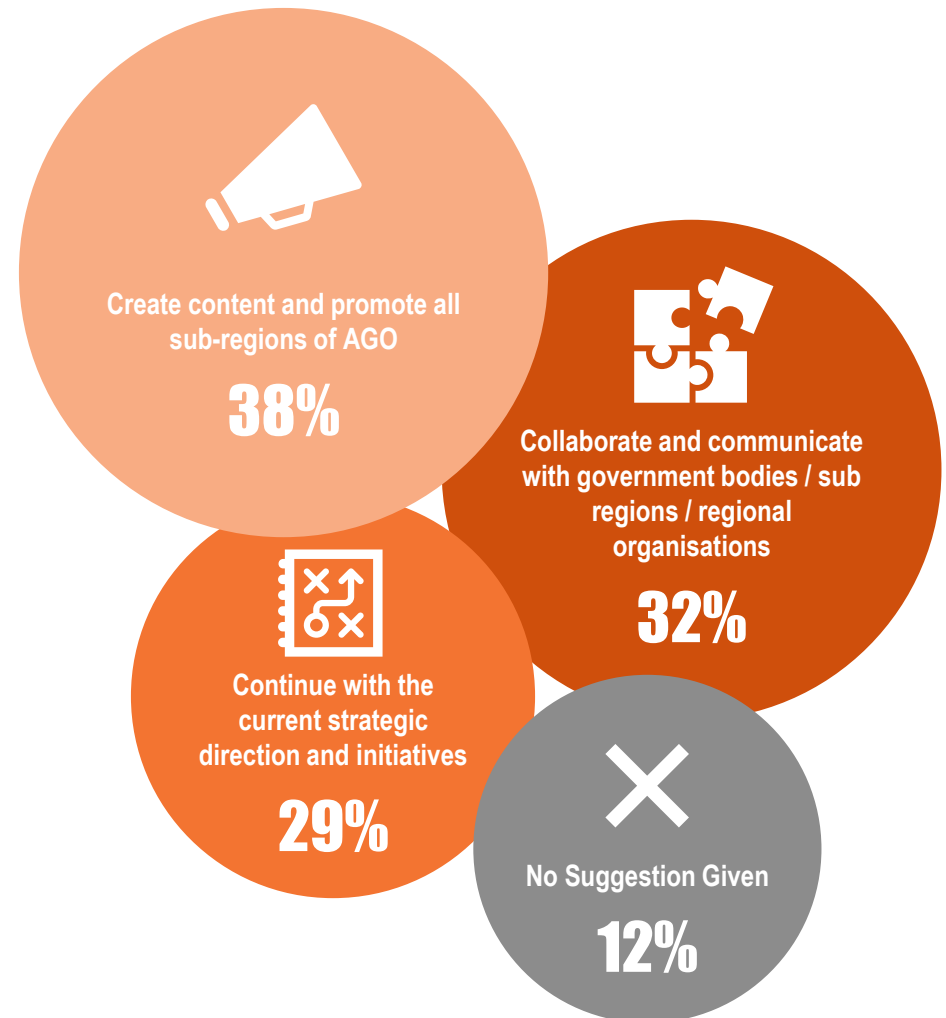
**Local Shire / Council, Gold**

Promote the latest marketing communication that businesses can use to promote the region, and develop products and materials. Be more involved in Economic Development initiatives that drive tourism.

**Visitor Centre, Silver**

Continue content creation which weaves into greater destination marketing campaigns for the subregions. Mentoring programs to help build capacity and continue to elevate the quality of experiences and product on the ground. Facilitating collaboration between development commissions, operators, investors, traditional owners, DBCA and ALL stakeholders to create a successful and thriving social tourism fabric.

**Accommodation, Gold**



# Wrapping Up



The key take-outs...



**1** Satisfaction among AGO members is high across all performance metrics, with communication results being particularly strong.

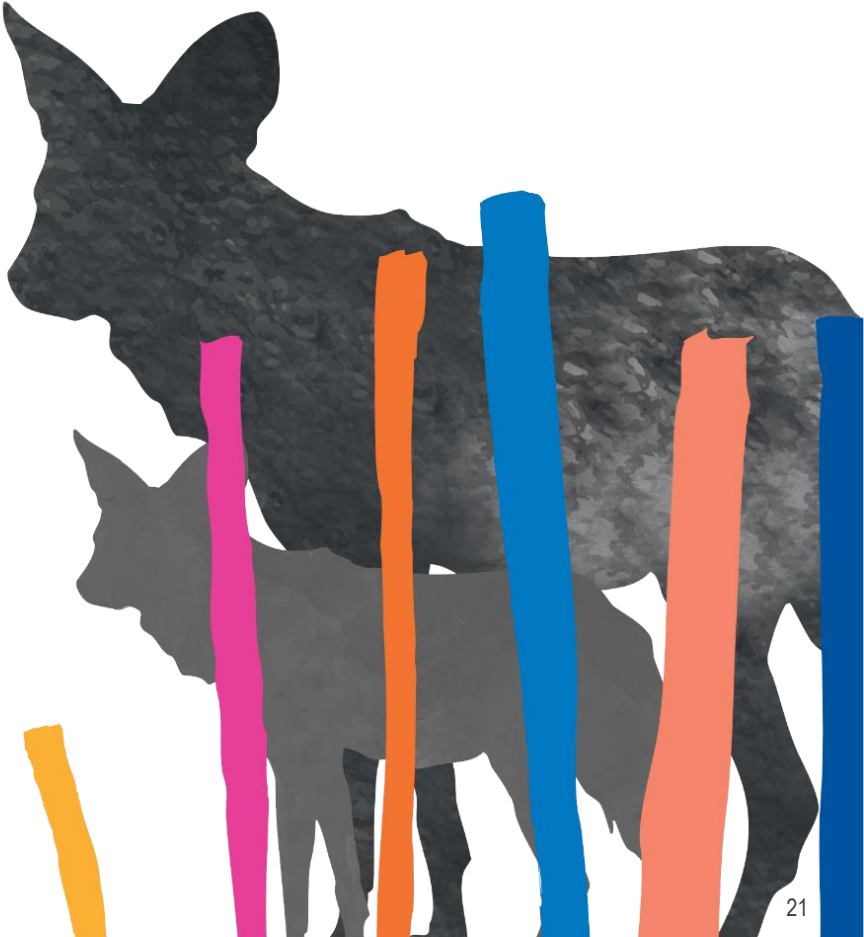
**2** Marketing support, business opportunities and staff support are the top activities that help to drive member value.

**3** Members cite marketing content generation, collaboration with government / tourism organisations and the continuation of AGO's current strategic direction as the best ways to help the region and businesses.

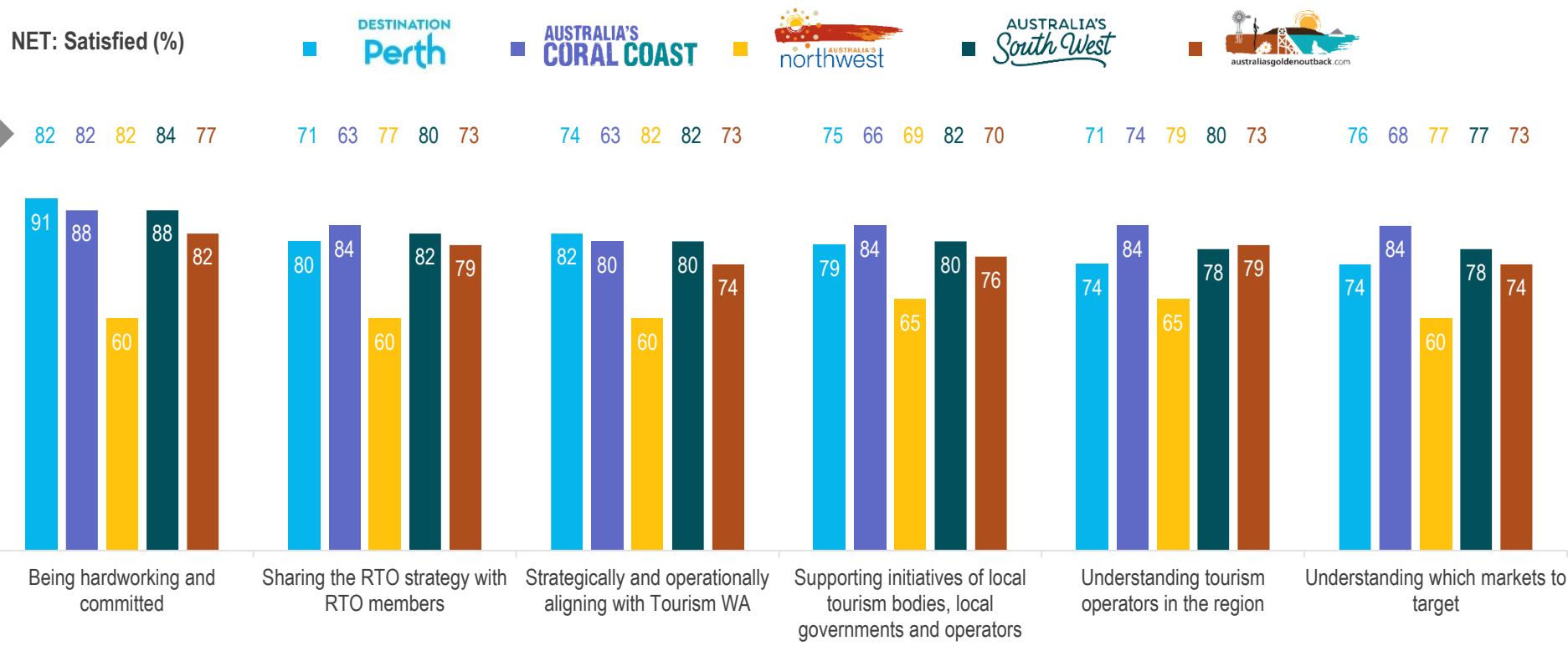
# Hunt Smarter.



# Appendix

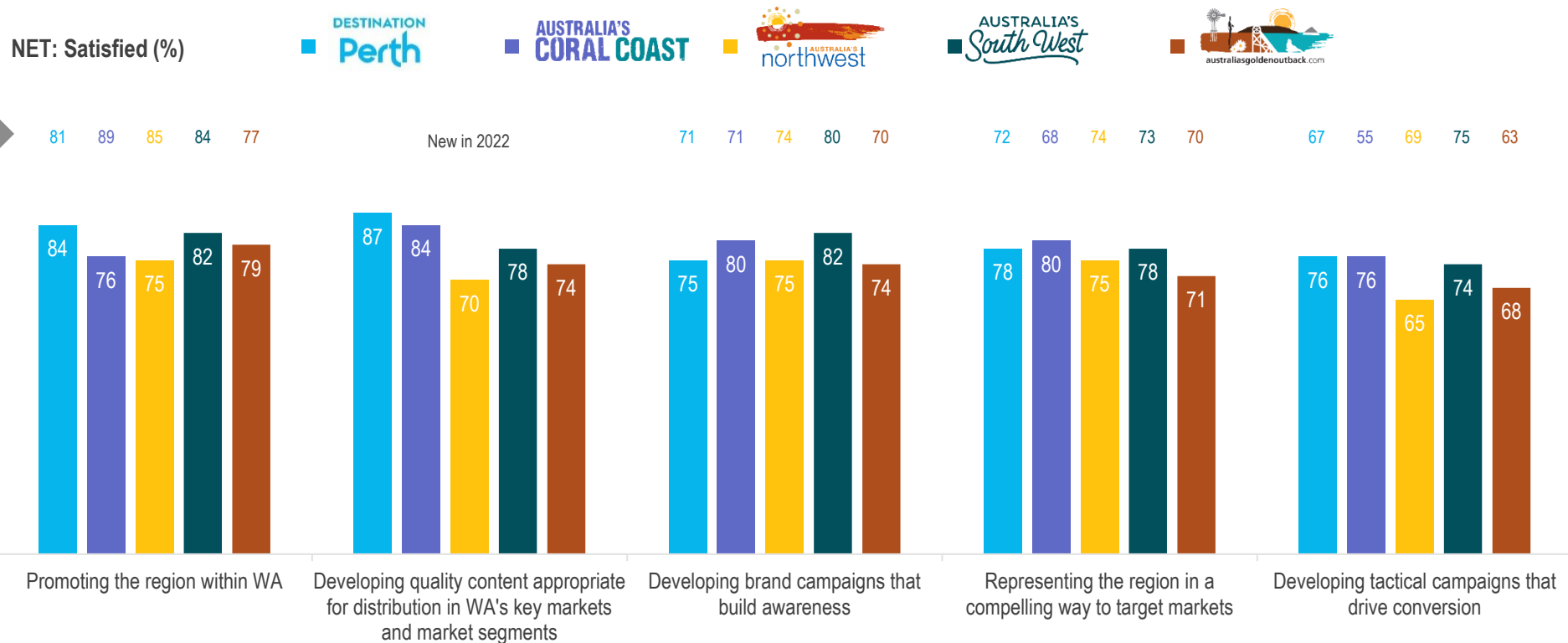


# Core operations: RTO comparison



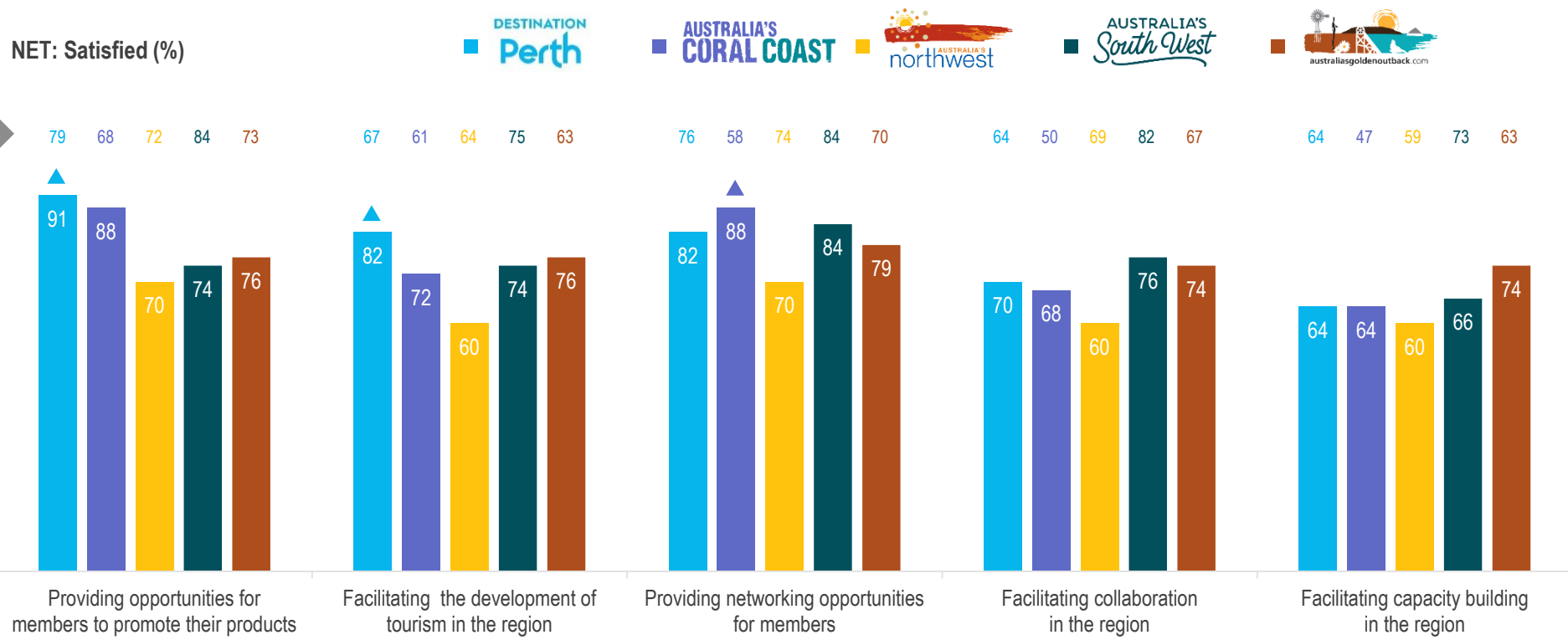
Q13. How satisfied are you with how your RTO has performed in each of the following in the past 12 months? Base: 2021 (n=223); 2022 (n=205).

# Marketing & promotion: RTO comparison



Q14. Thinking about the extent to which your RTO is helping to build awareness of the region, how satisfied are you with how your RTO has performed in each of the following in the past 12 months? Base: 2021 (n=223); 2022 (n=205).

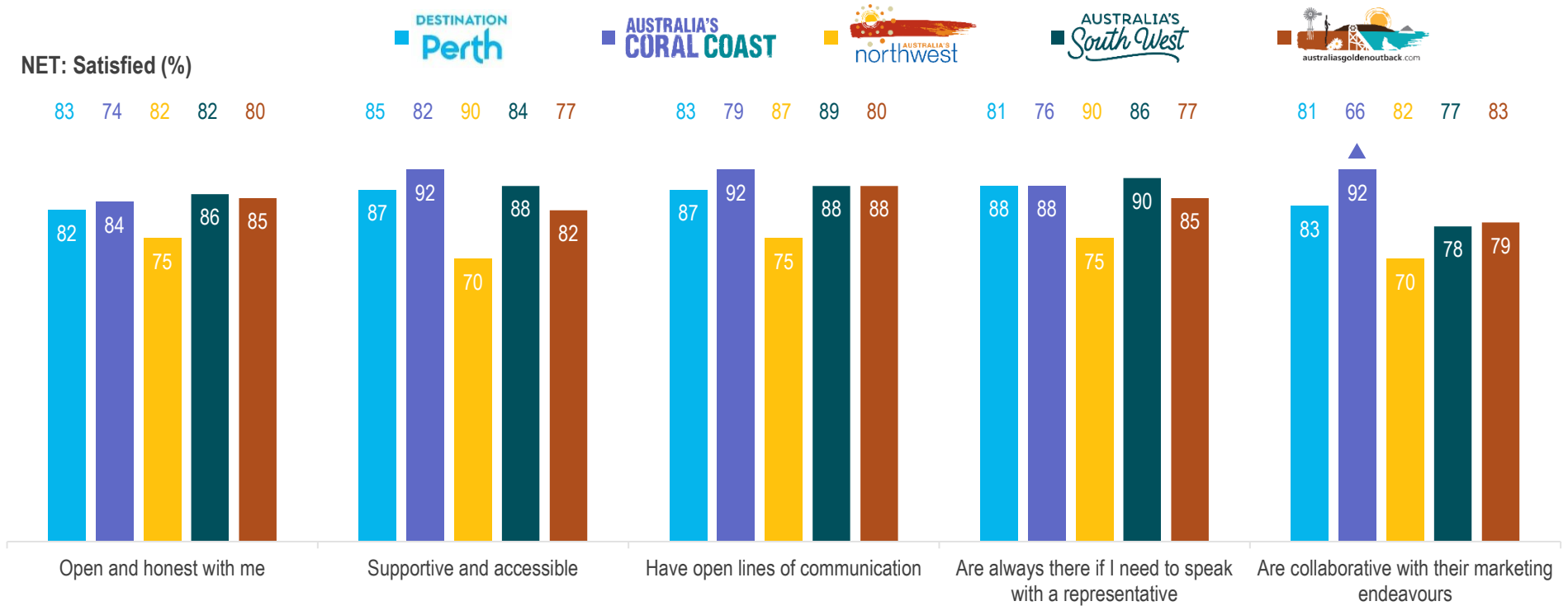
# Facilitation & opportunities: RTO comparison



Q15. Thinking about the extent to which your RTO is supporting the local industry and operators, how satisfied are you with how your RTO has performed in each of the following in the past 12 months? Base: 2021 (n=223); 2022 (n=205).



# Communication & relationship development: RTO comparison



Q16. Thinking about your relationship with your RTO in the past 12 months, how satisfied are you with each of the following? Base: 2021 (n=223); 2022 (n=205).

### Membership Sentiment & Value

- Positive perceptions of RTO membership remained strong and stable this wave.
- More than 3 in 4 members feel positively about their RTO, find their membership 'valuable' and are satisfied with destination marketing efforts.

### RTO Performance

- Across both overall sentiment and membership value metrics, Australia's Coral Coast improved this wave – restoring a historic lead across both metrics.
- Conversely, Australia's North West decreased across both metrics following the gains made last wave.
- Performance among other RTOs remains strong and stable.

### Membership Tiers

- Members in higher membership tiers (\$301+) consider their RTO's destination marketing significantly more effective.
- However, members in the lower tiers place greater importance on the RTOs' understanding of the region and its operators.

### Membership Drivers

- For the first time, 'supporting destination marketing' has become the primary reason for RTO member sign-ups.
- Effective destination marketing is seen as necessary for an RTO yet is not a strong conscious value driver.
- However, when prompted, most members referred to their RTO's support as a primary driver of value.

### Member Engagement

- The number of opportunities taken advantage of by members increased this wave – likely a result of easing COVID restrictions improving engagement.
- Significantly more members feel satisfied with their RTO's provision of networking opportunities this wave.

### Communication

- The number of members who say their RTO communicates 'the right amount' has remained strong this wave.
- All other communication metrics also see minor changes, if not slight improvements.
- Members agree that their RTOs are accessible and supportive – a driver of membership value.

