



# **NATIONAL ARBORETUM CANBERRA**

**Visitor Research Report**

**16 August 2016**



## Visitors' Survey 2016 Executive Summary

Over 2600 respondents.

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### Key findings

Respondents rated their visit to the Arboretum exceptionally highly:

- 92.8% rated their visit as excellent (42.2%) or good (50.6%)
- 5.93% rated their visit as average
- 0.81% rated their visit as poor
- 0.43% rated their visit as terrible.

### On a scale from 0-10, how likely is it that you would recommend the Arboretum to a family member, friend or colleague?

- 84% of respondents said it was 'highly or extremely likely' that they would recommend the Arboretum to a family member, friend or colleague.
- 1.7% of respondents said it was 'not at all likely' that they would recommend the Arboretum to a family member, friend or colleague.

### The Net Promoter Score (NPS)\*

The Net Promoter Score (NPS)\* of 51.47% is exceptionally positive (see \* for an explanation of NPS).

### What did you like most about your visit(s) to the Arboretum? Tick all that apply.

The elements that respondents liked most about their visit were: the views, Pod Playground, the National Bonsai and Penjing Collection, the trees and walks.

### The Arboretum is many things to many people. FOR YOU, what are the most important roles of the Arboretum?

The most important roles of the Arboretum, in descending order, were:

- A beautiful, natural place to visit
- A place for the conservation of rare and endangered trees
- A place to experience the outdoors by picnicking, walking, cycling or other outdoor activities
- An important tourist attraction for Canberra.

These findings underline the diverse values the Arboretum holds and the many different factors that visitors value about it. Importantly, the trees and forests are at the core of the values considered most important by respondents.

Shopping, functions, events and a good place to meet family and/or friends were found to be least

important to the respondents.

Ginger Catering provide hospitality and events management at the National Arboretum, and the company collects and analyses feedback from the functions and events audiences. Using this information, Ginger Catering have continuous improvement strategies in place.

While the gift shop may not be rated as highly valuable by respondents, when compared to more fundamental roles, it is a highly valued business partner of the National Arboretum.

### **Is there anything else you value about the Arboretum?**

Respondents identified a wide range of factors, including Bonsai, bikes, walking, design, views and nature.

### **How did you hear about the Arboretum? Please tick all the answers that apply.**

The most common way visitors heard about the Arboretum was through 'Friends, colleagues or family members' (45.3%), followed by 'Newspaper, TV or radio' (28.7%).

These findings suggest that the word-of-mouth recommendation for the Arboretum is very good. It also points to the importance of continually creating positive visitor experiences to maintain and enhance this reputation.

The Arboretum's traditional and digital media strategies seem to be effective, given the small amount of paid promotion being undertaken at this stage.

### **Would you like to join the Arboretum's mailing list?**

More than half of the respondents (51.8%) chose to join the Arboretum's mailing list to receive the e-newsletter and communication about news and events.

### **How can we improve the Arboretum?**

Many of these responses contain multiple comments and/or suggestions. The top twelve themes, in descending order of frequency are:

- Improved, more and safer cycling trails and facilities:
  - Improved and safer bike path up the main road with a safer connection from Lady Denman Drive
  - More and more family-friendly cycling trails throughout forests with better connection to other ACT bike paths
  - Improved bike locking and storage facilities.
- Improved and more varied facilities outside of the Village Centre:
  - More picnic, barbeque and sitting areas outdoors, sheltered from the wind, weather and sun and with toilet facilities

- More sheltered seating at lookouts
- Provide sheltered seating along the entrance to the Village Centre for frail, elderly and disabled visitors
- Provide a wide range of facilities, for example, a rainforest garden, water features, maze, night lights, sculpture trail, recreational and fitness facilities, sensory garden, flower garden, orchid garden.
- Provide a broader range of events and activities:
  - More varied events, such as live entertainment (not only opera), markets, multicultural events, light shows, film screenings, opportunities for more community engagement (building tree house, tree planting and sponsoring), interactive experiences, recreational events, nature play, yoga and dancing classes
  - More frequently changing displays, information and exhibitions in the Village Centre.
- Improved and expanded walking trails:
  - More sealed walking paths, accessible to elderly and disabled visitors
  - Better linking to other ACT walking trails.
- Keep up the good work:
  - Continue the way it is
  - Keep planting more trees and maintain the forests and facilities.
- Improve the café:
  - Broaden the menu choices, improve the speed of service and clearing and cleaning of tables
  - Increase the number of tables and chairs; it's too difficult to find a table.
  - Offer some cheaper food options.
- Make the car park free or lower cost:
  - Provide free parking; free for the first two hours; free on the weekends.



**Significantly lower in ranking:**

- More shade and seating in Pod Playground.
- Extend the opening hours for the Village Centre, including dinner.
- More public access to more of the Arboretum:
  - Open up the roads and forests currently closed to the public
  - Provide alternative transport and tour options, either free or user-pays, such as a mini-

bus, small 'train' or golf carts

- Keep the Arboretum accessible to the broad public.
- More information and interpretive displays and signs in the forests and gardens.



## Sample demographics

- 95.3% of respondents had visited the National Arboretum Canberra.
- Gender: 58.6% female, 40.6% male and 0.7% non-specified gender.
- Age: 31 to 50 year olds are the largest age group of respondents (45.7%), followed by 51 to 70 year olds (33.2%), followed by 19 to 30 year olds (14.7%) and over 71 year olds (4.9%).
- Residence: 99.5% of respondents reside in Australia.
- Residence in Australia: A large majority of respondents live in Canberra (83.1%), followed by NSW (14.4%), then Queanbeyan and Jerrabomberra NSW (4.9%). The next largest group reside in Victoria (1.6%), followed by a few visitors each from NT, SA, WA and Tasmania. The survey was held outside the school holiday period which would very probably effect this result.

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### \*What is NPS®?

The Net Promoter Score is a customer loyalty metric originally formulated by Fred Reichheld, Bain & Company and Satmetrix in 2003. It segments customers into three types: neutrals, detractors and promoters, and is used internationally to benchmark customer satisfaction for a huge range of companies.

### The Net Promoter Score & Net Promoter System

The original score is a customer satisfaction and loyalty indicator that measures the likelihood of customers to recommend a company, product or service to a friend or colleague.

The Net Promoter System takes the next step and turns results into action. Knowing the loyalty of customers in real-time, means companies can not only learn about their customers but are provided the tools to act immediately to improve each customer's experience.

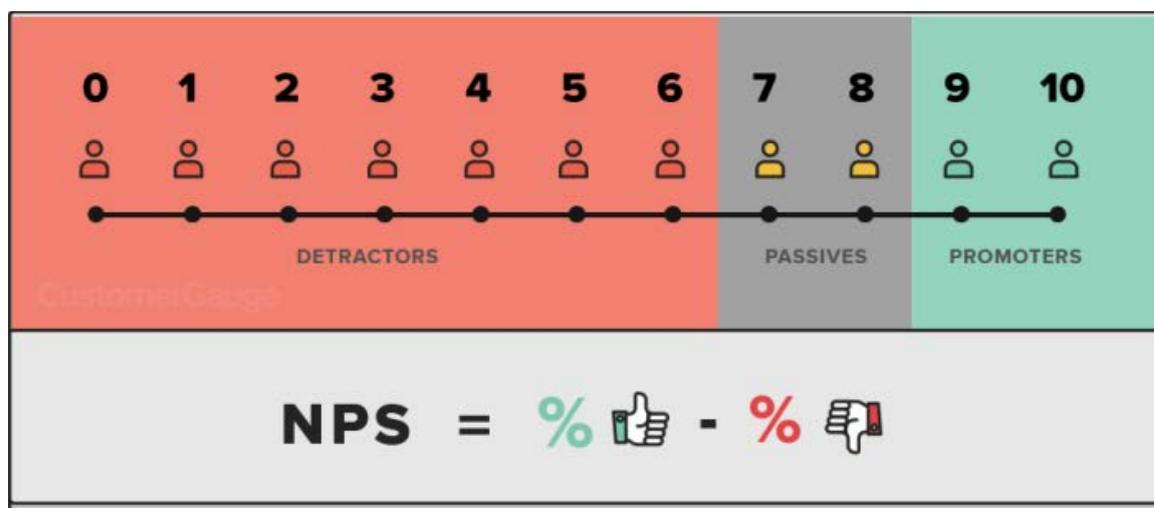
Widely used by Fortune 500 companies, the Net Promoter System creates tangible, usable feedback to help companies change what matters most – customer loyalty.

## Calculating the Net Promoter Score

The Net Promoter question is easy, on a scale from 0 to 10 it asks customers:

“How likely are you to recommend (this company, this product, this experience, this representative) to your friends, family or business associates?”

Depending on their response, customers are divided into three categories: detractors, passives, and promoters.



NPS is calculated by subtracting the percentage of detractors from the percentage of promoters.

**Detractors** (score 0 – 6) are your least satisfied customers. They may not purchase again and could spread negative word of mouth if something isn't done to improve their experience.

**Passives** (score 7 – 8) aren't typically satisfied, and their loyalty can't be assured. They are susceptible to competitors offers, but will spread neither negative nor positive word of mouth.

**Promoters** (score 9 – 10) are loyal and enthusiastic. This group will renew contracts, are open to upselling and will tell others to do the same.

The Net Promoter Score is calculated by subtracting the percentage of detractors from the percentage of promoters, yielding a score between -100 to 100.

A score of -100 means every respondent is a detractor while a score of 100 means everyone is a promoter. NPS is an indicator of your company's health and is the first step to improving your customer's loyalty.