Average expenditure	Summer	Autumn	Winter	All Seasons	All Seasons 95% confidence interval	
					Lower bound	Upper bound
Per trip Sample size	$174 (69)	$122 (30)	$169 (34)	$161 (133)	$90	$232
Per person Sample size	$42 (63)	$57 (28)	$80 (33)	$56 (124)	$41	$71

Table 13: Average expenditure, day trips

4.2.5 Expenditure patterns

Information on expenditure patterns is based on all the summer, autumn and winter data combined into an all seasons data set. Inspection of the patterns for each season did not reveal any significant difference between seasons. One of the most obvious findings from the survey is that respondents on day or overnight trips did not spend much money on many of the items listed in the questionnaire. In addition, in summer, autumn and winter, fewer than ten percent of respondents spent any money on:

- Hire cars
- Vehicle maintenance
- Other transport (other than own or hire car)
- Tours
- Camping equipment
- Conference fees or education
- Other expenditure items.

While actual amounts spent on these items are included in the expenditure estimates, they don't contribute much to totals or averages.

4.2.5.1 Overnight trips to Prom Country

Respondents on overnight trips spent on average $639 per travel party for the trip. Accommodation (in commercial establishments, not including National Park camping fees) was by far the largest expenditure item. However for people staying overnight in Prom Country, 27% spent no money on accommodation in commercial establishments as they camped in the National Park, stayed in their own holiday house or that of friends or camped for free. The other top expenditure items were take-away and restaurant food, groceries, petrol and National Park camping.

Item	Average per overnight trip
Accommodation	$315
Take-away and restaurant food	$75
Groceries	$67
Petrol	$55
Camping fees	$24

Table 14: Top 5 expenditure items, all overnight trips

Of interest is the number of respondents who did not spend any money on the most popular items while in Prom Country:

- 27% of respondents did not spend any money on accommodation,
- 30% did not spend any money on take-away and restaurant food,

- 32% did not buy groceries in Prom Country.
- 34% did not buy petrol in Prom Country and
- 77% did not spend any money on camping fees

Discretionary expenditure on items including gifts ($22 per trip) and activities and entertainment ($10 per trip) was low. This suggests that there are limited opportunities for such expenditure and/or respondents are trying to keep costs down.

4.2.5.2 Day Trips to Prom Country

Respondents on a day trip to Prom Country spent on average $114 per travel party. The main items of expenditure were as would be expected: take-away and restaurant food, groceries, petrol, gifts and activities and entertainment.

Item	Average per day trip
Take-away and restaurant food	$46
Groceries	$34
Petrol	$30
Gifts	$17
Activities and entertainment	$10

Table 15: Top 5 expenditure items, day trips

Again, of interest is the number of day trip respondents who did not spend any money on the most popular items while in Prom Country:

- 31% of respondents did not spend any money on take-away and restaurant food,
- 76% did not buy groceries in Prom Country,
- 62% did not buy petrol in Prom Country,
- 63% did not spend any money on gifts, and
- 82% did not spend any money on activities and entertainment

For day trippers, while discretionary expenditure on gifts and activities and entertainment was amongst the top 5 items, it was lower per trip than for overnight visitors. The large percentage of day trippers who did not spend any money on these items suggests that there are limited opportunities for such expenditure and/or respondents are trying to keep costs down.

4.2.6 Estimate of total expenditure by tourists

An estimate of the total expenditure by tourists in South Gippsland in a year was made using the data from the surveys on expenditure per person per day trip or per visitor night, multiplied by the estimates of total day trips and visitor nights from the TRA data set (reported in Section 3). The estimated total expenditure is approximately $123 million.

	Expenditure per person per day trip/night	Number of day trips/visitor nights	Estimated expenditure $000
Day trips	$56	509,000	$28,504
Domestic overnight	$100	884,700	$88,470
International overnight	$112	52,000	$5,842
Total			$122,798

Table 16: Estimate of total expenditure in a year

4.2.7 Direct and Total contributions to the South Gippsland Economy

The relationships established for tourism in Victoria in the state Tourism Satellite Account were applied to the estimates for total tourism expenditure in South Gippsland Shire. Based on interviews with tourism operators, they buy most of their inputs locally and employ local people (See Section 4.1), so there is no reason to suggest that the industry in the Shire behaves any differently from tourism in Victoria as a whole.

Tourism's direct contribution to Gross Regional Product of $45 million is around 3% of the Shire's GRP. The flow-on effect of this however supports a total of $101 million in GRP.

The number of direct jobs supported by tourism can be placed into context by considering jobs in the Accommodation & Food Services industry sector; 743 jobs in 2011. These 734 jobs are catering for both locals and tourists using these services. Thus the 646 jobs directly due to tourism estimated in this study will overlap Accommodation & Food services and other industries; based on expenditure categories from the survey these will be mainly in retail. The 646 jobs constitute 5.2% of jobs in the Shire. However, additional jobs are supported in the Shire due to the flow-on of tourists' dollars to other industries and these jobs may be lost or grow if tourism contracts or grows. The total tourism supported employment is 1,056 jobs.

	Direct	Total
Tourism consumption at purchasers prices	$123 m	
Tourism output	$104	$194
Contribution to Gross Regional Product	$45 m	$101 m
Employment – full and part time jobs	646	1,056

Table 17: Estimated tourism contributions to Gross Regional Product and employment

In summary, the current study has revealed that visitors to Prom Country do bring money into the region at a rate of around $640 per overnight trip and $56 per day trip. While this is a valuable contribution to the economy, it is obvious from the combined seasons' results that expenditure by overnight visitors is low relative to Victoria as a whole but similar to other coastal regions. The day trip estimate for combined seasons is also low compared to all Victorian regions.

4.2.8 Recommendations for future economic updating and benchmarking

The analysis above has illustrated (in sections 4.2.6 and 4.2.7) how an estimate of the economic contribution of tourism to the South Gippsland Shire economy can be made using:

- Expenditure per person per day/ night – for day trip and domestic and international overnight visitors
- Number of visitor days/nights– for day trip and domestic and international overnight visitors
- Tourism Satellite Accounts

None of these data are readily available for the South Gippsland Shire. Suggestions are made for adapting available data to provide reasonable estimates for the Shire.

4.2.8.1 Expenditure

This study has provided an estimate of expenditure at the Shire level. It is recommended that a similar local level expenditure survey be conducted at 5 yearly intervals to benchmark estimates. Meanwhile the estimates presented here can be used. Reference should be made to Regional

Profile data published by TRA to see if expenditure in Victorian regions changes from year to year and the South Gippsland estimates could be adjusted in line with any general changes.

4.2.8.2 Visitor numbers

South Gippsland Shire level data is available on request from TRA. It is recommended that due to small sample sizes, a 5 year average is used. It would be sensible to examine the visitor numbers for any unexplained variations and avoid using data for years where results are unusual compared to State level trends or vary unusually due to local issues such as natural disasters.

4.2.8.3 Economic contribution

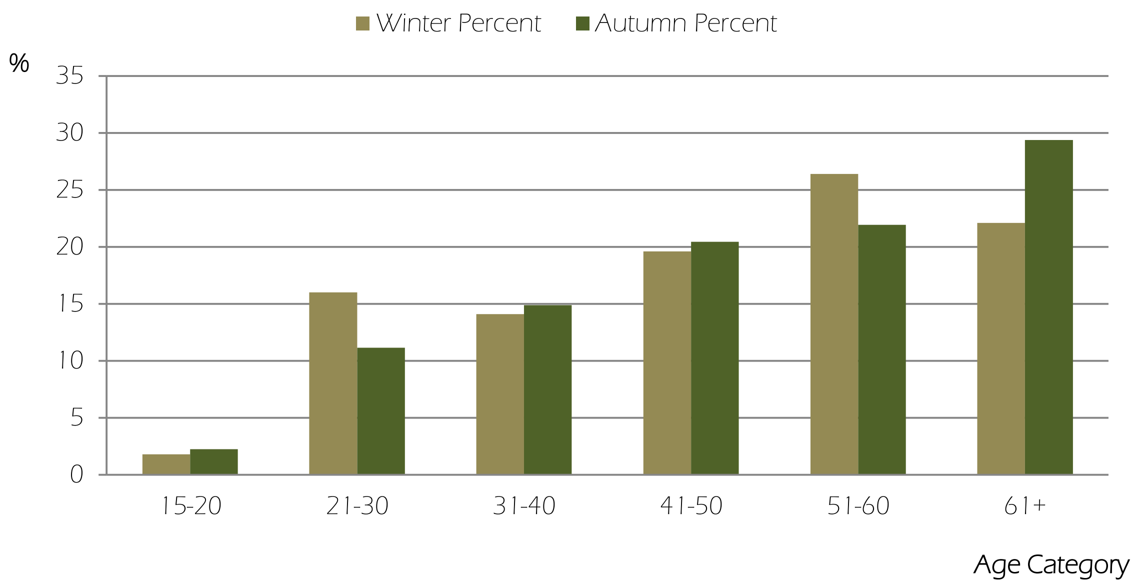
This study illustrated the use of multiplier relationships from the State level Tourism Satellite Account, to estimate similar relationships for South Gippsland. Due to the constant level of output multipliers for tourism in all States, this is considered a reasonable approach. Tourism Victoria is due to publish Regional Tourism Satellite Accounts shortly, and therefore the Gippsland Region account will be the relevant one to use for estimating economic flow on effects for tourism in the South Gippsland Shire.

4.3 Demographic Profile of Prom Country Tourists

4.3.1 Gender and Age Group

Autumn and winter presented similar patterns in terms of the gender and age groups of tourists. Autumn travellers were predominantly female (58%) and this proportion was almost replicated during the winter months (57%). With regards to the age group of visitors to the region during autumn and winter, tourists over the age of 41 were highly represented across both seasons comprising 74% and 71% of visitors respectively Of those aged over 41, tourists aged between 51 and 60 were most commonly represented in the winter season and in the autumn, there was a high representation of older tourists with the majority being over 61years.

Figure 2: Age group of autumn & winter visitors



In comparison to the summer data, while the gender representation appears to be similar across the three seasons, this can't be said for the age of the region's tourism market. The summer data revealed an even spread of visitor age groups suggesting that the region at this time of year appeals to a broad market in this sense. During the winter and autumn seasons however, the region evidently appeals to the more mature traveller.

It is important to note at this point that the gender bias represented above could also be explained by the fact that females are also more likely to complete or participate in market research; hence this result should be interpreted with caution.

4.3.2 Relationship Status and number of dependents

In summer, there was a strong presence of tourists who, despite being in a relationship, did not have any dependent children (i.e. children living in the family home). The autumn and winter data presented similar patterns in terms of relationship status – 84% of autumn visitors and 86% of winter visitors were either married or in a de-facto situation, and comparable results in terms of dependent children with 58% of autumn visitors and 64% of winter visitors being empty nesters. Across both seasons, a high proportion of visitors indicated that they were travelling as a couple not as a family, suggesting that regardless of their family status, many chose not to have their children accompany them on their trip.

4.3.3 Place of Origin

As with the summer analysis, the origin of autumn and winter visitors was assessed via postcode data for domestic visitors and country or region of origin for international visitors. International visitors represented 15% of autumn visitors and 13% of winter visitors, compared with 18% revealed from the summer data. While in summer, tourists from Germany were well represented among respondents, this was not the case over the autumn and winter months, with the internationals tourists across both of these seasons coming from a variety of European countries, the UK and the USA with no distinct patterns. The seasonal opposites between Australia and these countries may offer some explanation for the downward trend.

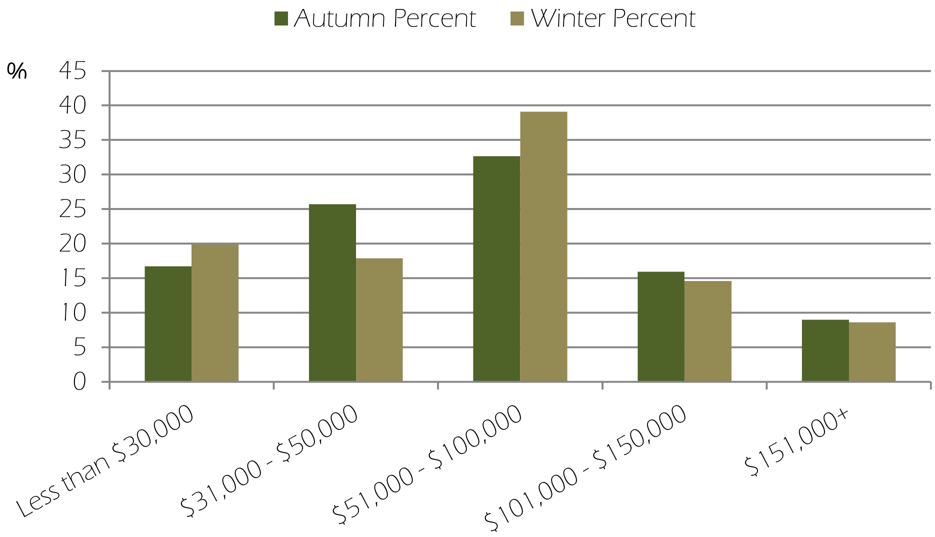
The post code data revealed that during both autumn and winter, the majority of Prom Country's visitors come from other parts of Victoria. Only 20% of autumn visitors were from interstate, with the majority of these coming from New South Wales (12%), followed by Queensland (6%) and Western Australia (2%). In winter, visitors from interstate represented less of the travel market, with a total of 16% coming from outside of Victoria, the bulk of which again came from New South Wales. Compared to summer, it is apparent that Prom Country is likely to appeal less to interstate visitors in the cooler months. This could be explained by the propensity of Australian travellers to head north as opposed to south during the autumn and winter seasons.

4.3.4 Occupation and Household Income

In the summers study it was difficult to identify patterns in terms of occupation as they were vast and varied. However, observation of the responses to both the autumn and winter surveys indicated that close to a quarter of autumn visitors and 20% of winter visitors were retired. Health care workers and teachers were also well represented across both seasons.

These findings are somewhat supported by the income brackets of autumn and winter visitors as illustrated below in Figure 3. The household income on more than half of the autumn visitors was less than $100,000, while close to 50% of winter visitors also recorded income levels below this amount. However, not unlike the patterns revealed in the summer study, there still remains a significant (20-25%) proportion of affluent visitors during autumn and winter – perhaps represented by the medical and education professionals.

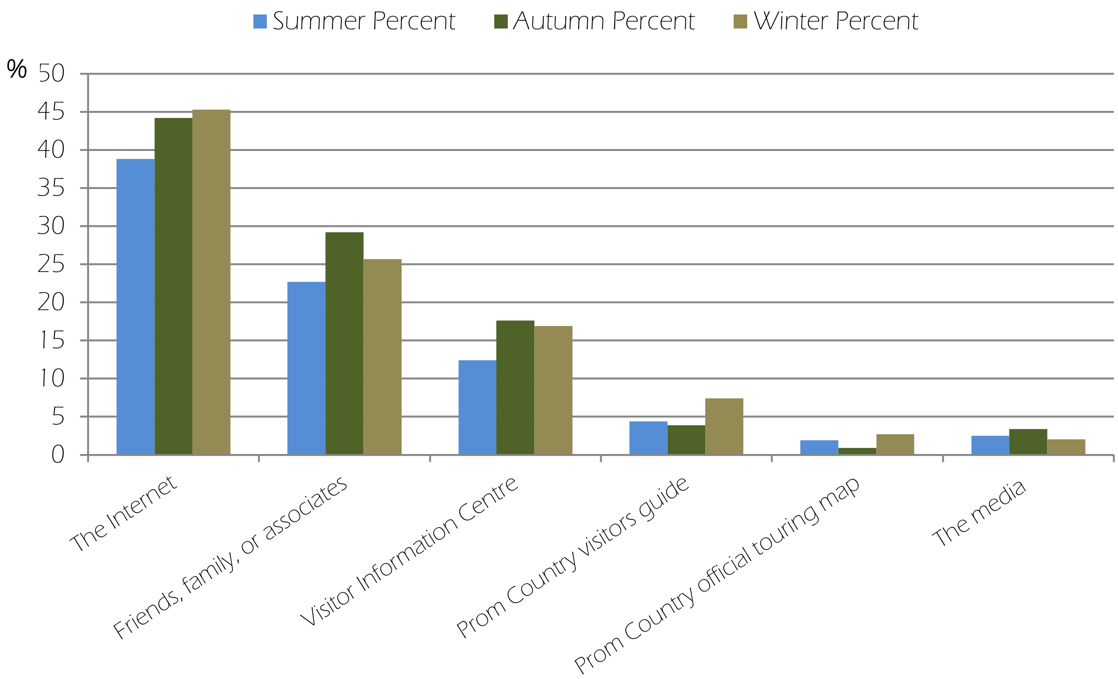
Figure 3: Household income among autumn and winter visitors



4.4 Pre Trip Planning

An understanding of where and how visitors plan their travel provides destination marketers with essential information as to where and how to advertise their products and services. The data revealed almost identical patterns in terms of the visitor's pre-trip planning activities in the autumn and winter months as to that we noted in the summer study. The internet was the most popular information source, followed closely by family and friends. Little attention was paid to the media, the region's official touring map or the visitor guide. Visitor information centres however were an important information source to some autumn and winter visitors. The chart below illustrates these similarities across the three seasons.

Figure 4: Pre trip planning information sources



4.4.1 Accommodation Booking

Not dissimilar to summer visitors, a significant proportion of both autumn and winter visitors booked their accommodation directly with the operator or used online booking services. Of those who chose the 'other' option (16% autumn and 15% winter) in response to this question, many were staying with family and friends, some had their own holiday homes while others were free camping. A small minority did not book in advance and simply arranged accommodation on arrival at the facility.

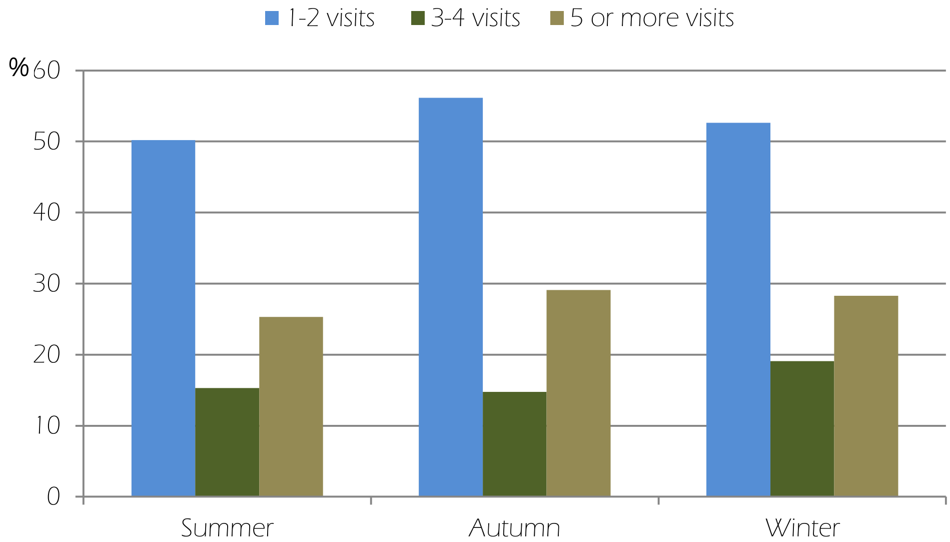
4.5 The travel behaviour of South Gippsland's Visitors

The results presented in this section reveal the actual travel behaviour of Prom Country's autumn and winter visitor markets. Detail is presented in relation to their travel party, past visitation to Prom Country, where the visitors spent most of their time and in what style of accommodation. This section also cites the kinds of activities visitors are most likely to engage in while visiting the region and their likelihood of visiting a number of Prom Country's primary tourist attractions.

4.5.1 Past Visitation to Prom Country

Interestingly, across both seasons, for 65% of visitors, this was their first visit to Prom Country. This result differs substantially from that revealed in the summer study which revealed a strong presence of repeat visitors (63%). Of those who had visited previously, 28% of autumn visitors and 29% of winter visitors could be classified as loyal to the region, having visited five or more times in the past five years. More detail as to the loyalty patterns of these markets is presented in the figure below.

Figure 5: Past visitation to Prom Country



4.5.2 Accommodation Preference

Not surprisingly, the autumn and in particular the winter visitors displayed substantial differences in terms of their accommodation preferences to those of the summer market where a majority noted camping and caravanning as their main accommodation source. In autumn, 26% of visitors stayed in hotels or bed and breakfasts and 20% stayed in self-contained apartments or cabins. Only 23% utilised camping and caravanning facilities (compared to 44% in summer) and 12% stayed with friends and relatives. In winter, self contained accommodation was the most popular option (32%) followed by hosted accommodation – hotels (13%) and bed and breakfasts (11%). Camping and caravanning is not a preferred option for most during the winter period.

4.5.3 Where overnight visitors stayed

The travel patterns in this regard differ from the summer months with less than 3% of autumn visitors staying at Wilson's Promontory, compared to 37% in summer. This meant that during the autumn months visitors were very well dispersed throughout other destinations although Yanakie (closest township to the Prom) presented as the most popular overnight location. Foster was also popular for an overnight stay, followed by Sandy Point and Loch. There was no notable difference in the travel patterns demonstrated by the winter market. One similarity across the three seasons is that few visitors stayed overnight in the Mirboo north vicinity.

4.5.4 Where autumn and winter visitors spent most of their time

Despite the majority of autumn and winter visitors choosing not to stay overnight at Wilson's Promontory, both markets obviously consider this icon to be worthy of a significant amount of attention whilst in Prom Country. Second to this, Foster was listed as the location visited noted as spending the majority of their time. However, it is important to note that when disregarding these locations, the remaining open ended responses were vast and varied – signifying, that like those who visited in summer, winter and autumn visitors are also generally well dispersed across the region.

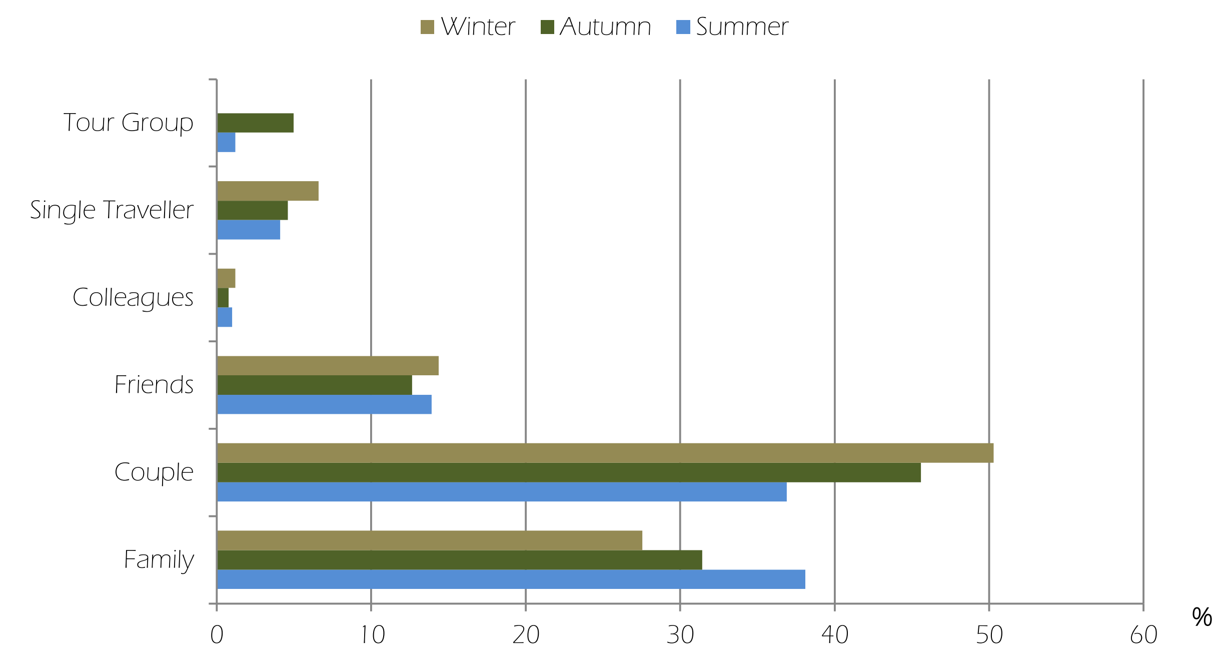
4.5.5 Mode of Transport

In summer it was revealed that the majority of visitors had their own vehicle, this was again the case across autumn and winter. However, during the winter season, 10% of visitors were travelling by bus which is significantly more than the 2% who used this form of transport in summer. This was the only notable difference across the three seasons.

4.5.6 Type of Travel Party

In winter, couples appear to dominate the visitor market with over 50% of respondents falling into this category. This is disparate to the summer data but consistent with the market research undertaken in 2010 that also had strong representation from the couples market. We see significantly fewer families travelling in Prom Country during winter than the summer which is to be expected for reasons previously stated. In autumn, the family market has slightly more representation but again, couples are the most likely travel party. Those travelling with friends feature across both seasons, however, comparatively such visitor groups are not that common, nor are those travelling alone. These comparisons are illustrated below.

Figure 6: Type of travel party



4.5.7 Where to next?

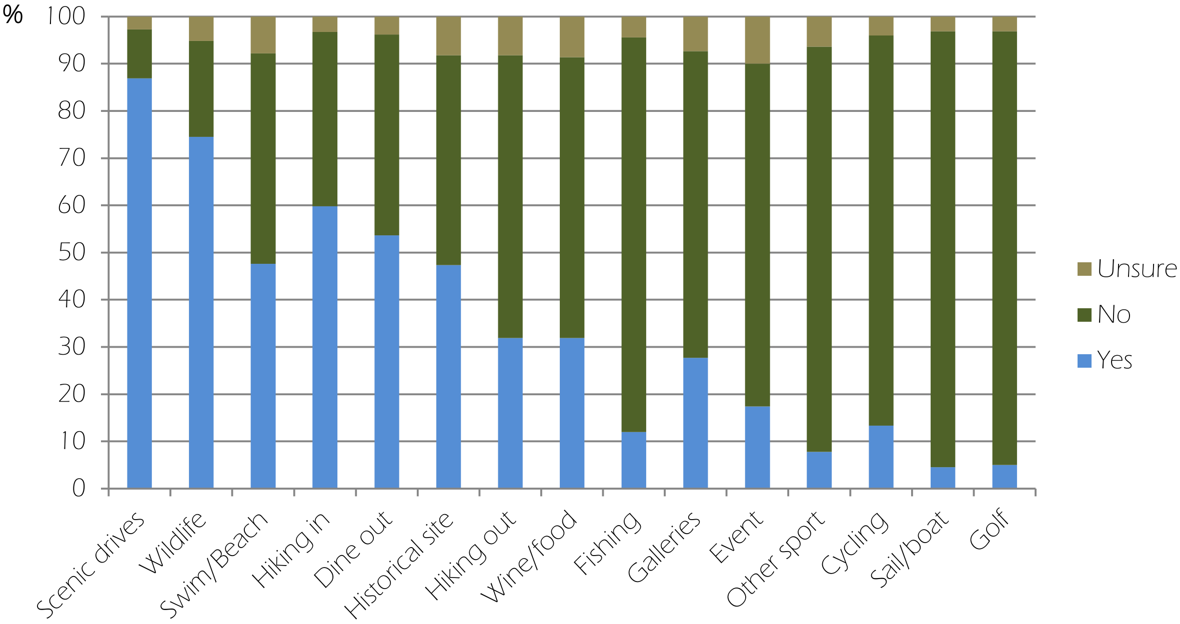
Visitors were asked to indicate whether they intended on visiting another destination on their travels prior to returning home. For many autumn visitors (45%) their visit to Prom Country was obviously one part of their holiday with 25% continuing on to Phillip Island and 20% continuing onto the Mornington Peninsular or the Yarra Ranges. Only 10% were heading to Melbourne and 11% to Lakes Entrance. Twenty six percent of visitors were travelling to a wide variety of destinations not listed in the survey and there was no evident pattern as to their most likely location.

Thirty four percent of winter visitors were on route to another destination with a significant proportion travelling to Phillip Island (21%) and Melbourne (20%). Lakes Entrance was also cited among 10% of visitors and the Mornington Peninsula or Yarra Ranges was next on the itinerary for 17% of winter visitors. Only 6.8% of visitors were travelling interstate, indicating that the majority were planning to stay within Victoria.

4.5.8 Preferred Activities while visiting Prom Country

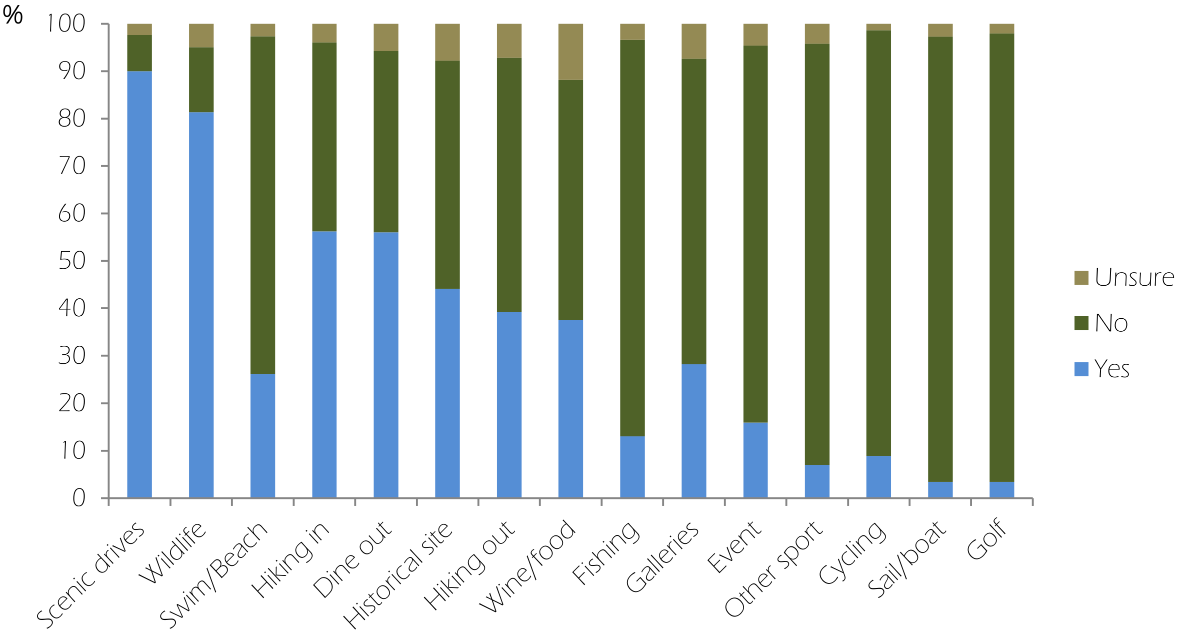
When asked to indicate whether they have undertaken or intend to undertake a range of activities, visitors revealed an interest in a number of options. An unsure option was provided to allow a response option to those who were yet to consider their activities.

Figure 7: Autumn visitor preferred activities



When comparing the graphical illustrations presented in figures 7 and 8, one can see that there is little difference between the activities undertaken in the autumn and winter seasons. The main notable difference concerns the visitors' preference for beach activities and this is self explanatory. The less popular activities among the autumn and winter markets were consistent with those revealed in the summer study with the exception of visiting art galleries, which is a more popular activity during autumn.

Figure 8: Winter visitor preferred activities

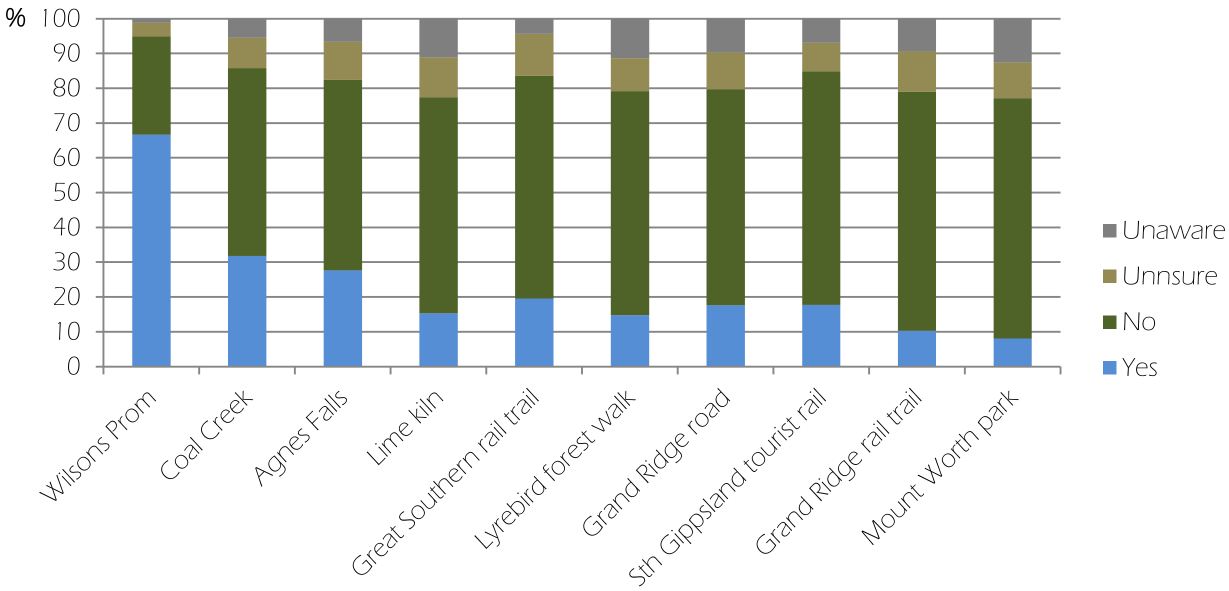


As indicated in the chart above, the most popular activities among winter visitors include scenic drives, exploring the local wildlife, hiking in Wilsons Promontory and dining out. The main difference between the winter activities and those disclosed in the summer study is that not surprisingly swimming and beach activities were somewhat less popular at this time, with 48% as opposed to 70% of summer visitors participating in such activities. While scenic drives and wildlife viewing and hiking were among the most preferred activities revealed in the market research study conducted in 2010, dining out was not in the top three in 2010 suggesting that food and beverage is becoming an increasingly important consideration for the region from both a supply and demand perspective.

4.5.9 Other Attractions / Sites Visited

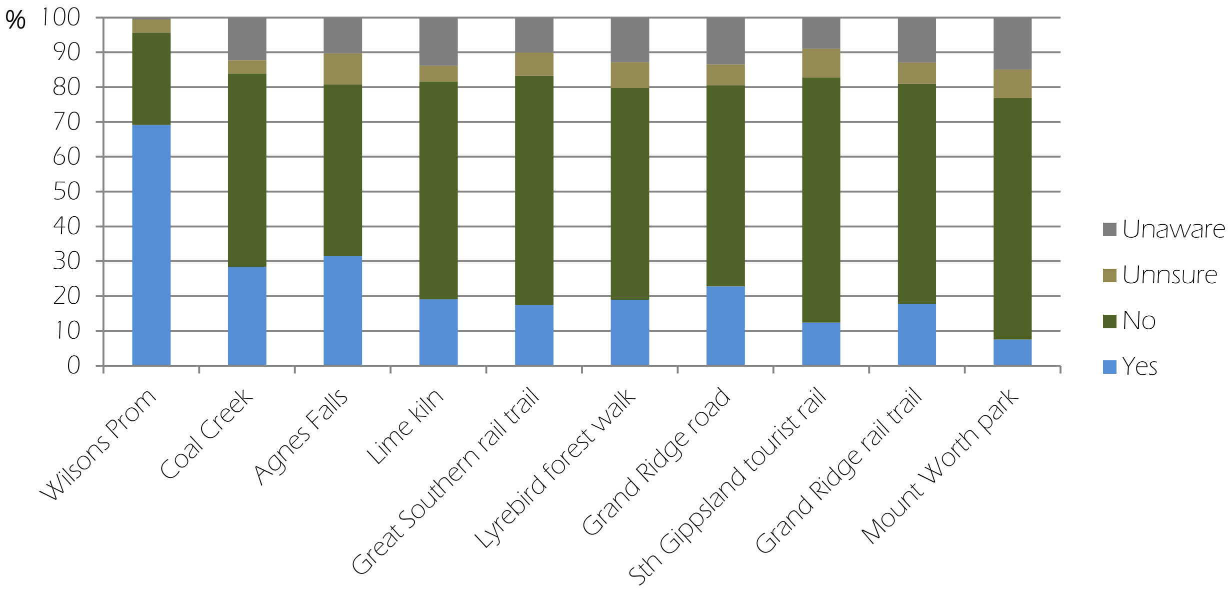
Respondents were asked to indicate whether or not they intend to visit a number of attractions currently offered in Prom Country. In addition visitors were asked to indicate whether or not they were aware of these sites to provide the region's tourism marketing manager with feedback in this regard. Again the option of unsure was provided for those who were still planning their travel activities. The results are charted in figures 9 and 10 below.

Figure 9: Other attractions/sites visited by autumn visitors



Wilson's Promontory across all three seasons is undoubtedly the regions primary drawcard, second to this for the autumn visitors is Coal Creek and for the winter visitors, Agnes Falls. The Grand Ridge road is also popular with the winter visitors, more so than those who visit in autumn and significantly more so than those who visit in the summer months.

Figure 10: Other attractions/sites visited by winter visitors



The two attractions that present moderate concern in relation to awareness among the autumn and winter markets are Mount Worth State Park and Lyrebird Forest Walk and despite the popularity of the Grand Ridge Road among winter visitors, 13% of respondents were unaware of this icon. Given scenic drives was rated as the number one activity by both of these markets, it is recommended that this lack of awareness be considered by those responsible for marketing the region. It is again evident that despite visitors being mobile, many of the regions natural and manmade attractions are being overlooked when considering the travel itinerary. This was also evident in the qualitative discussions with operators who spoke of an overdependence on Wilson's Promontory resulting in a lack of promotional activity that focuses on other areas. Recommendations regarding this finding are made later in the report.

4.5.10 Primary Motivations of the autumn and winter Visitor Markets

Table's 18 and 19 below presents the mean motivational scores for the autumn and winter visitors recorded using a 5-point likert scale ranging from 1 = strongly disagree to 5 = strongly agree. The seven key motivations presented to respondents are commonly used to represent the reasons tourists take a leisure holiday.

Autumn Visitor Motives for visiting Prom Country	Mean
1. To rest and relax	4.36
2. To experience nature	4.33
3. To escape	4.06
4. To spend time with my partner	4.03
5. To experience something new	4.00
6. To spend time with family	3.64
7. To spend time with friends	3.44

Table 18: Mean motivational scores for the autumn visitors

The top motivation for the autumn leisure visitor is to rest and relax, closely followed by the need to experience nature. While the summer results were slightly different in this regard – with the need to experience nature rated as first, the minor mean differences between these two motives indicate that both can be perceived as equally important. The other notable difference between the order presented in the summer data and that of the current study is the mean order of motives 4 and 5. Again, the insignificant difference between the corresponding means suggests these two markets are not dissimilar. Rest and relaxation was noted as the primary motivation for visitors who took part in the previous research in 2010, and the fact that a nature based experience is equally as important reaffirms the broader region's nature based positioning strategy and provides positive feedback in terms of the desired market position.

Winter Visitor Motives for visiting Prom Country	Mean
1. To experience nature	4.50
2. To rest and relax	4.48
3. To escape	4.21
4. To spend time with my partner	4.09
5. To experience something new	4.01
6. To spend time with family	3.74
7. To spend time with friends	3.44

Table 19: Mean motivational scores for the winter visitors

Winter visitors were very much in alignment with summer visitors and the market research results revealed in 2010 in terms of their top motivations for visiting Prom Country. The remaining mean ranked scores indicate that aside from the fact that winter visitors are more likely to be inspired by the region's natural attractions than those who visited in autumn, there is little difference between these markets in terms of their reasons for visiting the region.

A small proportion of autumn visitors (8%) and winter visitors (7%) were visiting the region for reasons other than leisure. The key reasons across both groups included visiting friends and relatives, business and those that were passing through to get to another destination.

4.5.11 Visitor satisfaction with their Prom Country experience

Respondents were asked to rate their satisfaction with various attributes of their holiday via a 5-point likert scale with 1 being very dissatisfied and 5 being very satisfied, the mean responses to this question from both the autumn and winter markets are listed in descending order in Tables 20and 21.

Attributes	Mean
Visitor Information Centre	4.52
Brochures*	4.46
Quality of Attractions	4.29
Variety of Attractions	4.23
Quality of Accommodation*	4.23
Friendliness of local businesses*	4.23
Online Visitor Information/ Website*	4.19
Value of Accommodation	4.15
Accessibility to Attractions	4.15
Picnic Areas	4.14
Signage*	4.10
Variety of Accommodation	4.08
Public Toilet Facilities	4.02
Variety of Shops	3.98
Variety of Food and Beverage	3.81
Condition of roads	3.10
Mobile Reception	3.31

Table 20: Autumn visitor satisfaction with experience

The majority of all satisfaction scores rated by the autumn market are over 3 indicating that these visitors, overall, were happy with their experience in Prom Country, even more so than those who visited in summer. There are some notable differences in terms of the attributes presented in the table and the two markets' satisfaction ratings, these are marked with an asterisk According to the results, autumn visitors were more satisfied with the brochures, the quality of accommodation, the website and signage than those who visited in summer. This does not necessarily indicate an improvement in these areas, but perhaps differing expectations and visitor experiences as a result of the slightly different demographic and type of trip characteristics (i.e. camping vs. hosted accommodation). On a negative note, the friendliness of local businesses dropped from second place to sixth place in the autumn wave of the study. Mobile phone coverage and quality of the roads remained as the least satisfactory attribute demonstrating consistent issues for the visitor market in this regard.

Winter visitors were slightly less satisfied overall, however significant differences between the winter and the autumn visitors were noted in terms of mean order in which satisfaction of these attributes was rated. Winter visitors were most satisfied with the friendliness of those that served them during their trip, and in contrast to those who visited in autumn were not as satisfied with the visitor information centre (although a mean score of 4 still indicates a high level of satisfaction). The online visitor information was also not as highly regarded by the winter market.

An important observation across both seasonally defined markets is the dissatisfaction with the variety of food and beverage outlets in the region. This is particularly worthy of further attention when referring to the preferred activities in figures 7 and 8 above where dining out is rated considerably high. Again, mobile reception and the quality of roads continue to be an issue according to some, with Vodafone customers representing the majority of low scorers on this attribute.

Attributes	Mean
Friendliness of local businesses*	4.30
Quality of Attractions*	4.07
Brochures	4.02
Variety of Attractions	4.01
Visitor Information Centre*	4.00
Quality of Accommodation	3.96
Accessibility to Attractions	3.92
Signage*	3.84
Value of Accommodation	3.79
Picnic Areas	3.78
Public Toilet Facilities	3.77
Variety of Accommodation	3.73
Online Visitor Information/ Website*	3.67
Variety of Shops	3.64
Condition of roads	3.62
Variety of Food and Beverage	3.57
Mobile Reception	3.43

Table 21: Winter visitor satisfaction with experience

4.6 Prom Country's Market Profile

Reflecting on the findings from the three consecutive studies, the researchers are of the view that the market profile of Prom Country's visitor market remains relatively similar across the summer, autumn and winter seasons. The characteristics of these three markets are summarised in the following table.

Descriptor	Summer	Autumn	Winter
Age Group	All	Over 61	51-60
Relationship Status	Couple	Couple	Couple
Place of Origin	Victoria	Victoria	Victoria
International Origin	Germany	Varied	Varied
Occupation	Varied	Retired / Health Care/ Teachers	Retired / Health Care / Teachers
Household Income	Less than $100K	Less than $100k	Less than $100K
Pre Trip Planning	Internet	Internet	Internet
Accom Booking	Direct with operator	Direct with operator	Direct with operator
Number in group	Groups of 3 or more	Groups of 2	Groups of 2
Past visitation	63% repeat visitors	65% first time visitors	65% first time visitors
Most time spent	Wilsons Promontory	Wilsons Promontory	Wilsons Promontory
Mode of transport	Own Vehicle	Own Vehicle	Own Vehicle
Travel party	Families	Couples	Couples
Most preferred activities	Scenic drives Wildlife viewing Beach Activities	Scenic Drives Wildlife viewing Hiking in the Prom	Scenic Drives Wildlife viewing Hiking in the Prom
Primary motivations for Visiting Prom Country	Experience Nature Rest and relaxation Escape	Rest and Relaxation Experience Nature Escape	Experience Nature Rest and Relaxation Escape
Average Expenditure – per person per night	$99	$97	$127
Average Expenditure- per person - day trip	$42	$57	$80

Table 22: Summary of market profiles across summer, autumn and winter

The fact that these three markets are relatively homogenous according to the variables investigated in this study will allow Prom Country regional tourism to achieve economies of scale in terms of their promotional spend as the seasonal campaigns need not differ dramatically, particularly when considering the demographic characteristics, travel behaviour, preferences and motivations of the target audience.

With regards to the economic contribution of these visitors, on examination of the money spent on the individual items that make up total expenditure, there are many areas where there may be opportunity to boost expenditure in Prom Country. These include where visitors clearly make purchases outside the region to support their visits: petrol, groceries and even camping equipment. Opportunities in the region for increased expenditure include on: accommodation, food and beverages, gifts and activities and entertainment. Total spending would also be enhanced if visitors were to stay longer in the region and if more people visited, especially in the autumn and winter periods. Recommended strategies in this regard are proposed in the following section.

5 Recommendations

The interviews undertaken with Prom Country tourism operators suggested that many of these small business owners are reluctant to invest or grow their tourism business. The extreme seasonal nature of tourism activity in the region was the number one reason for this according to a majority of the operators. To encourage tourism investment from both existing and potential stakeholders, South Gippsland needs to focus on growing their non-summer periods by increasing visitor numbers, duration of stay, and expenditure. The preliminary study completed earlier this year proposed a series of recommendations as to how Prom Country may prosper in the summer months. The following recommendations are based on the findings of the market profiling / economic impact research undertaken during the autumn and winter seasons. The interests and opinions of Prom Country's tourism operators have also been considered in the formation of these suggestions – all of which aim to assist South Gippsland Shire Council and Prom Country Regional Tourism to develop a sustainable and economically viable tourism industry all year round.

The recommendations are separated into three distinct sections; destination management, opportunities for investment and promotional activities.

5.1 Destination Management

In the previous report, recommendations were made with regards to packaging and the need for cooperative marketing in the form of all inclusive travel itineraries (i.e. accommodation and food and beverage). Our interviews revealed that some operators, particularly those not located close to the Prom, are particularly keen to collaborate in this sense but found their potential 'partners' to be rather hostile towards the idea. Collaboration is essential to regional tourism destinations, particularly those whose services are widely dispersed geographically. The modern day traveller is time poor and will welcome a pre-planned itinerary that saves them the time and hassle of planning their travel to destinations they are unfamiliar with. It can also be frustrating for tired travellers who arrive at their regional destination late in the day only to learn that the nearest place to purchase a meal is a 45 minute drive. In addition, one motelier mentioned in the interview that coach companies had contacted their business for 'arranged tour' ideas within the South Gippsland region. Coach companies are a great source of visitors for Prom Country and offer significant economies of scale in terms of marketing spend. This particular operator however, despite her attempts, was unable to put together any kind of itinerary for the coach company due to a lack of cooperation from fellow operators.

It is therefore recommended that PCRT and/or SGSC emphasise and enforce the importance of collaboration among its operators and offer educative and training opportunities such as professional development workshops in this area, the facilitation of familiarisation tours and the continuation of the networking opportunities currently offered to members.

The second recommendation pertains to the region's regional tourism association PCRT. It is apparent that membership numbers of this essential organisation are decreasing and for the sake of a collaborative industry, it is important that tourism operators acknowledge their role in determining the destination's success. The interviews undertaken with operators indicated two issues in terms of their sentiment towards PCRT. Firstly, it was apparent that some operators did not understand the value of being affiliated with such an organisation and secondly, some operators felt underrepresented by PCRT due to their not being closely affiliated with the Prom.

It is recommended that more resources be assigned to this organisation to allow for the education and recruitment of new members.

It is also recommended that PCRT assign some of its marketing budget to incorporate those attractions not likely to receive attention from the broader regional and state marketing bodies.

Inter-regional marketing opportunities exist for Prom Country to cross promote their product offering with destinations such as Phillip Island, Mornington Peninsular and the Yarra Ranges. It appears that consistencies exist in terms of the market characteristics and travel patterns of the autumn and winter visitor markets. Collaborative promotional activities might include exchange of tourist information between operators, the creation of a travel itinerary or the development of a themed travel route based on the common product offerings of the three regions (e.g. nature, arts and crafts, food and beverage, adventure etc). It is recommended that PCRT pursues such opportunities with nearby destinations.

The conditions of the roads remain to be a significant issue for tourists visiting Prom Country in terms of their satisfaction. Whilst there is no 'overnight' solution for this, relevant government institutions need to be continuously alerted to this infrastructure issue for the safety and wellbeing of visitors.

5.2 Product Development and Investment Opportunities

It was revealed in the summer study that visitors were spending relatively little on food and beverages; the same patterns emerged in both winter and autumn. However, it appears that the non-summer markets, whilst rating this activity high on their list of preferences, are somewhat dissatisfied with the range of food and beverage options available to them. Further, the demographic profile of the autumn/winter markets indicated that many of these visitors are travelling without children; hence they have the time to spend in restaurants and cafes without the burden of childcare.

Food and beverage facilities can not only provide opportunities for additional expenditure, but they also add to the appeal of a regional destination. Restaurants, bars and cafes provide tourists with indoor entertainment options which are particularly sought after in cooler seasons. Prom Country offers a plethora of opportunities for investment in this area especially in the southern part of the region where many of the accommodation facilities are self-catering and food and beverage facilities are limited to one small grocer. An increase in food and beverage options will also present further opportunities for collaboration between both accommodation and attraction providers, potentially increase the visitor's stay and most importantly their expenditure.

It is recommended that PCRT develops some information on key investment opportunities to promote to potential investors via the South Gippsland Shire Council, Tourism Victoria's Investment Attraction Team and invest Victoria.[6]

[6] http://www.tourism.vic.gov.au/tourism-industry/2012-08-21-14-30-58.html http://www.invest.vic.gov.au/

A small step in this direction would be the expansion of the Yanakie General Store or businesses in this vicinity. This area is perfectly placed to house a cafe or restaurant. A small business of this nature could also cater for hikers by offering picnic lunches and other take away options – which in turn would stimulate expenditure by those participating in 'free' activities.

Guided tours were listed in the previous study as a potential income generator. Considering the age segments of the autumn/winter market, the introduction of guided tours through the national parks and other natural attractions becomes even more viable. Understanding that the more mature market segments may not be as willing to embark on a hike or walking tour unaccompanied, an opportunity exists for a small business specialising in guided eco-tours for this segment. Again, this would stimulate expenditure from what would ordinarily be a free activity. Further opportunities to package these tours with food and beverage would also increase the visitor's average spend.

As noted above, there appears to be some interest by Melbourne based coach companies for touring routes within the region. It is recommended that PCRT liaise with these organisations to determine their requirements and work on designing daytrip and overnight itineraries for the coach owners to promote. There are substantial opportunities to be had by accommodation providers and local restaurant owners from accessing this market – particularly in the quieter months.

With the average length of stay during the autumn and winter months being less than 3 nights, consideration needs to be given to the development of itineraries that last 3 to 4 days. One of the differences between the summer and non-summer visitors is that those who visit in the non-summer months are less likely to be bound by time restrictions that evolve around school and work holidays. Many of the non-summer visitors were retired providing more support for the assumption that time is not an issue. This presents significant opportunity for Prom Country to increase the length of stay by showcasing the vast and varied number of activities and experiences the region has to offer via the development of a variety of itineraries likely to suit the needs of both retirees and those seeking rest and relaxation. The variety of impressive but somewhat underutilised natural attractions such as Agnes Falls, Mount Worth and Lyrebird Forest Walk are just some of the products that could be included in such packages - generating awareness and enhancing visitor dispersal. Again, collaboration among operators is imperative to the success of such a venture.

The non-summer visitors' preference for scenic drives and wildlife viewing present significant opportunities for the development of a range of interpretive products such as guidebooks, informative touring maps and audio devices that provide commentary on local attractions to encourage people to spend time in local townships and visit a more diverse range of attractions. These products could be made available for purchase from visitor information centres, local retailers and online for those who plan ahead. One challenge faced by nature based destinations such as South Gippsland is that many of the activities do not generate expenditure; the introduction of such products would encourage expenditure and enhance the visitor experience as well as increase their time spent in the region taking part in these self-guided interpretive tours.

5.3 Promotion

As mentioned previously, Prom Country's summer, autumn and winter markets are reasonably synergistic in terms of their market profile and visitor behaviour and the recommendations proposed in the summer report remain relevant across all seasons. However, based on our observations and our conversations with operators, we believe that more emphasis/marketing spend is needed for the promotion of the non-summer periods. The main reasons for this is that the Prom's popularity is such that it serves as a self-promoter for the region during the summer months with the majority of the market being repeat visitors. In autumn and winter however many new visitors come to the region and while the Prom may stand as a major drawcard, there is an opportunity to educate these newcomers of the various other natural attractions the region has to offer. The non-summer markets may also be less reticent to explore beyond the Prom as the beach style activities favoured by the summer market are obviously not as important in the cooler months. We therefore propose that PCRT consider the following recommendations when devising their future promotional strategies.

The current mobile phone application has been extremely well designed and we believe this can serve as a platform for a number of interactive promotional activities. The application currently lists touring routes whether on foot, bike or car and can also be used in the trip planning process. Functionality that facilities itinerary planning in alignment with visitor motives and demographics could be added whereby visitors considering a trip to the region could enter their details (which in turn provides market intelligence to PCRT) and preferences and the application could present the ideal itinerary including where to stay, where to eat, what to see and how long they should stay. Currently, while the application lists the region's attractions and tourism related services there is still a lot of planning involved for the visitor and for regional destinations in particular this can be quite onerous when one is not familiar with the distance to and from attractions from their accommodation and how far other supporting services such as restaurants, cafes and grocery stores etc. are. This can lead to frustration both before and during their stay which then compromises the experience. This innovation could also result in an increased expenditure and length of stay due to the visitor being more informed of what there is to see and do.

The autumn and winter markets are fond of dining out and given the extreme weather conditions the region is subject to in the winter months, indoor restaurants, cafes and hotels are often highly sought after as a place to take shelter. The region's food and wine providers should give heightened attention to marketing and promotional campaigns during the non-summer periods as well as any other 'indoor' attractions. It is important that Prom Country is seen as offering more than just nature based activities that are likely to be avoided when the weather is perceived as cold and wet. Art Galleries were also more popular among the autumn and winter visitors so these too should feature in the associated campaigns.

During our interviews with the regions restaurant and cafe owners, it was evident that every small operator had a 'story to tell' whether it be about their own background or that of the township or the business. An effective marketing exercise could be to highlight their stories as a weekly feature on the PCRT website or encourage some public relations activities to promote their business to the wider community and potential visitors. Lucy May's Cafe is one example of a business with a story worthy of telling.

The final recommendation refers to the internal promotion of the importance of tourism to the broader community of South Gippsland. It is crucial that those who are likely to come into contact with visitors understand that they play just as important a role as those directly involved. Local businesses such as service stations, chemists, medical practices, beauty services, convenience stores, bakeries and fashion retailers are all likely to service tourists and the quality of service they provide, the attitudes they display will inevitably leave a lasting impression on the visitor experience. Such stakeholders should be able to provide local information, give directions and advice on local attractions and supporting services. It is therefore important to advise those working in these sectors of their obligations in this regard. An internal (intraregional) campaign that communicates this message will raise awareness among those who perceive themselves as having no affiliation with the tourism industry of how important all visitors are to the region and its economy.

Food and beverage facilities can not only provide opportunities for additional expenditure, but they also add to the appeal of a regional destination

6 References

Australian Bureau of Statistics (2011a). *Census of Population and Housing*, Canberra: Australian Bureau of Statistics, retrieved http://www.censusdata.abs.gov.au/census_services/getproduct/census/2011/quickstat/LGA26170?opendocument&navpos=220

Australian Bureau of Statistics (2011b). *Census of Population and Housing*, Canberra: Australian Bureau of Statistics, retrieved from http://economy.id.com.au/south-gippsland/employment-census

Australian Bureau of Statistics (2012a). *Australian National Accounts* 5206.0, Canberra: Australian Bureau of Statistics.

Australian Bureau of Statistics (2012b). *Value of Agricultural Commodities, NRM Regions* 75030DO003, Canberra: Australian Bureau of Statistics.

Australian Bureau of Statistics, (2012c), *Victoria, Tourism Regions* (map only), 9503.0.55.001, Canberra: Australian Bureau of Statistics.

Driml, S. & McLennan, C., (2010*). Handbook on Measuring the Economic Value of Tourism to National Parks*. Gold Coast: Sustainable Tourism Co-operative Research Centre,.

Pham, T. D., & Kookana, J. (2013). *State Tourism Satellite Accounts 2011-12*. Canberra: Tourism Research Australia

South Gippsland Shire Council (2013) *Industry Profile*. retrieved from http://www.southgippsland.vic.gov.au/Page/Page.asp?Page_Id=716

Tourism Research Australia 2013a, *International Visitor Survey, December Quarter 2012*, Canberra: Tourism Research Australia, Canberra.

Tourism Research Australia 2013b, *National Visitor Survey, December Quarter 2012*, Canberra: Tourism Research Australia, Canberra.

Tourism Research Australia (2013c), Unpublished data on South Gippsland. Canberra: Tourism Research Australia.

Tourism Research Australia (2013d), *Regional Tourism Profiles 2011/12*. Canberra: Tourism Research Australia.

United Nations World Tourism Organisation (2013). *UNWTO Tourism Highlights 2013 Edition*, Madrid: United Nations World Tourism Organisation.

7 Appendix

7.1 Prom Country Tourism Questionnaire - Winter

Prom Country Tourism Questionnaire

SECTION A

1. Is this your first trip to Prom Country?
 - ☐ Yes
 - ☐ No

2. During which month did you visit Prom Country?
 - ☐ June
 - ☐ July
 - ☐ August

3. Are you on a day trip or an overnight trip?
 ☐ Day trip ☐ Overnight: how many nights?_______________

4. How many times, including this trip have you been to Prom Country in the last 5 years?
 ☐ 1 -2 ☐ 3-4 ☐ 5 or more

5. Via which mode of transport are you travelling?
 ☐ Car (own) ☐ Car (hire)
 ☐ Bus ☐ Other: please specify_______________

6. Do you intend to visit another destination prior to returning home after visiting Prom Country?
 ☐ Yes (please go to question 7) ☐ No (please go to question 8)

7. If you are travelling to another destination (not home) where do you intend to travel to from Prom Country?
 ☐ Interstate ☐ Mornington Peninsula
 ☐ Phillip Island ☐ Melbourne
 ☐ Lakes Entrance ☐ Great Ocean Road
 ☐ Dandenong/Yarra Ranges ☐ Other, please specify____________

8. Via which of the following information sources did you access most of your information about Prom Country when planning your trip? Please select one option.
 ☐ The Internet ☐ Prom Country Official Touring Map
 ☐ Friends, Family or Associates ☐ Prom Country Visitors Guide
 ☐ The Media -television, Newspaper, magazines) ☐ Visitor Information Centre

9. How did you book your accommodation?
 ☐ Direct with the accommodation facility ☐ Via a travel agent
 ☐ Via an online booking facility ☐ None, day trip only
 ☐ Via the Visitor Information Centre ☐ Other, please specify_______________

10. Did you visit Prom Country for leisure / holiday purposes?
 ☐ Yes (please go to question 11) ☐ No (please go to question 12)

11. I chose to take a break / holiday:	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
To escape the everyday hustle and bustle of the city					
To spend quality time with my family					
To spend quality time with my partner					
To experience something new and unique					
To spend time with friends					
To rest and relax					
To experience nature					

12. If not travelling for leisure / holiday please indicate your primary reason for visiting Prom Country? Please select one option.

- ☐ To visit friends and relatives
- ☐ Business
- ☐ Passing through on my way elsewhere
- ☐ To attend an event
- ☐ Other, please specify______________

13. During my stay in Prom Country I have undertaken or intend to undertake the following activities:	YES	NO	UNSURE
Hiking/bushwalking (outside of Wilson's Promontory)			
Hiking/bushwalking (inside Wilsons Promontory)			
Scenic Drives			
Wildlife Viewing			
Visiting historical sites and Museums			
Swimming / beach activities			
Attend an Event or Festival			
Cycling			
Art Galleries			
Fishing			
Visit wineries and gourmet food producers			
Sailing / boating			
Golfing			
Dining out			
Other sport			

14. During my stay in Prom Country I intend to visit the following sites:	YES	NO	UNSURE	UNAWARE
Walkerville Lime Kilns				
Grand Ridge Rail Trail				
Wilsons Promontory				
Great Southern Rail Trail				
South Gippsland Tourist Railway				
Grand Ridge Road				
Lyrebird Forest Walk				
Mount Worth State Park				
Agnes Falls				
Coal Creek				

15. What type of accommodation, if any, did you use while visiting Prom Country?

- ☐ Hotel/Motel
- ☐ Bed and Breakfast
- ☐ Caravan Park Cabin
- ☐ Caravan Park Camping
- ☐ Camping (national park)
- ☐ Free camping
- ☐ Self Contained Apartments/Cabins
- ☐ Holiday House
- ☐ Friends / relatives home
- ☐ Backpackers

16. In what town did you stay (if any): ___________________________?

17. In what town / location did you spend most of your time while visiting Prom Country?

SECTION B

1. Have you visited, or are you going to visit the Wilsons Promontory National Park while in Prom Country?

☐ Yes ☐ No

2. Have you visited, or are you going to visit Mount Worth State Park while in Prom Country?

☐ Yes ☐ No

3. If the national parks in Prom Country were closed to visitors at this time, would you have chosen to visit this region anyway?

☐ Yes ☐ No

4. Can you please fill out the following table making your best estimate of how much money you and your travel party will spend in Prom Country on this trip? Please tick **$0** if you did/will not spend any money in that category.

	Estimate for your **total** time in Prom Country
Hire car for time in Prom Country	$_________ or ☐$0
Petrol/fuel purchased in Prom Country	$_________ or ☐$0
Vehicle maintenance and repairs in Prom Country	$_________ or ☐$0
Other local transport (bus, taxi etc.)	$_________ or ☐$0
Organised tours and side trips	$_________ or ☐$0
Accommodation (can include food and drink at accommodation)	$_________ or ☐$0
National Park camping fees	$_________ or ☐$0
Camping equipment purchased in Prom Country	$_________ or ☐$0
Takeaways and restaurant meals	$_________ or ☐$0
Groceries, ice etc for self-catering	$_________ or ☐$0
Drinks, alcohol (not already reported above)	$_________ or ☐$0
Shopping, gifts, souvenirs	$_________ or ☐$0
Activities and entertainment (entry fees, museums etc)	$_________ or ☐$0
Conference fees, education fees	$_________ or ☐$0
Other (please specify)	$_________ or ☐$0

5. Reflecting on your experience in Prom Country, please rate your satisfaction with the following attributes.	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Brochures					
www.visitpromcountry.com.au Web Site					
Visitor Information Centres					
Tourist Signage					
Variety of accommodation					
Quality of accommodation					
Value of accommodation					
Variety of attractions					
Quality of attractions					
Accessibility of attractions					
Quality of roads					
Public Toilets					
Friendliness of local businesses					
Variety of shopping establishments					
Variety of food establishments					
Picnic Grounds & BBQ Areas					
Mobile phone reception. Please specify carrier_____________________________					

SECTION C

Visitor Profile Information

1 What age group do you belong to?

☐ 15 – 20 ☐ 21 – 30 ☐ 31 – 40 ☐ 41 – 50 ☐ 51 – 60 ☐ 61+

2. What is your Gender?

☐ Male ☐ Female

3. What is your Post Code? ___________________

4. If from outside Australia, please list Country of origin: _________________________

5. What is your relationship status?

☐ Single ☐ Married ☐ Couple/De-facto

6. How do you best describe your travel party? Please select one option:

☐ Family,
☐ Couple,
☐ Friends,
☐ Colleagues
☐ Single Traveler,
☐ Tour Group

7. How many people are in your travel party?

Under 15 years of age _______________ Over 15 years of age _______________

8. How many children / dependants (if any) do you have living at home? _____________

9. What is your occupation? ____

10. Please tick the following income bracket that best represents your combined family income:

☐ Less than $30,000 ☐ 31,000 - $50,000 ☐ $51,000 – $100,000

☐ $101,000 – $150,000 ☐ $151,000 +