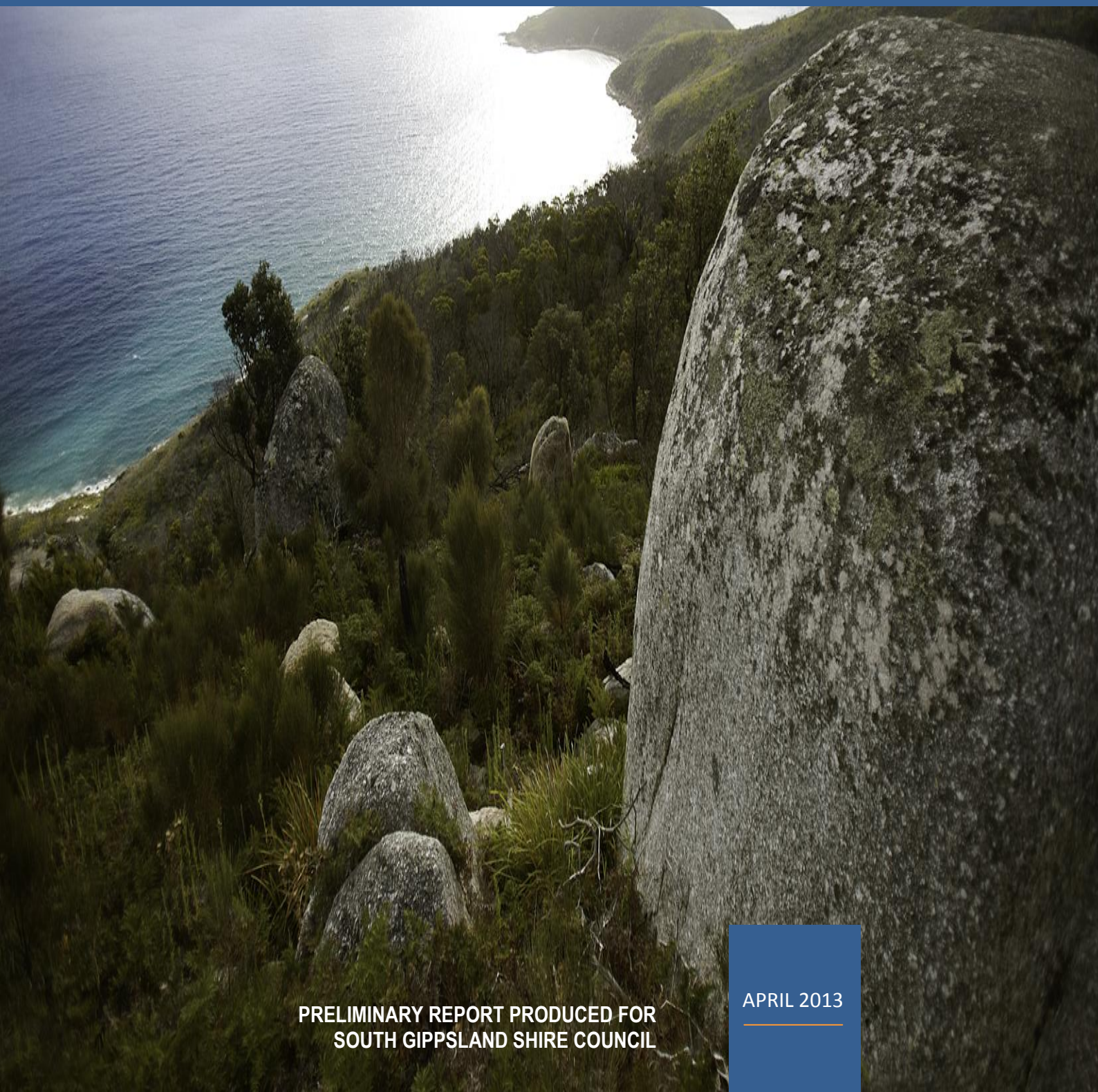


# Prom Country Economic Impact and Visitor Profile

SUMMER SEASON  
2012/13



PRELIMINARY REPORT PRODUCED FOR  
SOUTH GIPPSLAND SHIRE COUNCIL

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The views expressed in this publication are those of the researchers commissioned to undertake this research for the South Gippsland Shire Council.

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## 1. Executive Summary

This report, commissioned by the South Gippsland Shire Council, provides a detailed profile of visitors to South Gippsland, often referred to as Prom Country, over the summer of 2012 / 2013 and contributes to a broader project that explores the economic impact of tourism in this region taking into account seasonal variation. Additionally, this report provides insight into the impact of the bushfires that occurred in other regions of Victoria during this period.

Primary data were collected from individuals visiting South Gippsland. A total of 563 usable surveys were collected.

Analysis of the demographic profile revealed:

- 62% of respondents were female;
- representation of age categories was fairly evenly spread between the ages of 31 to 60 with slightly less in the 21 to 30 age category;
- 88% of respondents were married or a couple;
- 45% had between 1 and 3 dependent children;
- 19% of respondents were international visitors;
- the majority (71%) of visitors were from Victoria;
- the majority of respondents reported household income between \$50,000 and \$100,000 however almost 30% earned less than \$50,000 per annum.

Examining pre-trip visitor behaviour, the data revealed the following:

- the Internet is the number one source of information; and
- accommodation is predominantly booked directly with the provider or online.

The travel behaviours of visitors while in the region were explored in the survey and analysis of the data found that:

- the majority of people (50%) were travelling with 1 or 2 people, and 36% were in groups of 3 or 4 people;
- 63% of respondents were repeat visitors with 28% of these visiting the region annually;
- the average stay was 4 nights and the maximum was 30 nights;
- 44% of respondents were staying in camping and caravan accommodation;
- 37% of overnight stays were at Wilsons Promontory, followed by 18% at Foster and 10% at Inverloch;
- travel patterns of visitors appear to be well dispersed throughout the towns of the region;
- 95% of visitors travelled to the region by car;
- couples and families made up 70% of the sample with similar representation of each;
- undertaking scenic drives, seeing the wildlife and spending time at the beach were the most popular activities followed by hiking in the national park and dining out;
- the most visited attraction in the region was Wilsons Promontory. Responses indicate that visitation to other attractions is rarely due to a lack of awareness;

This study explored the economic impact of tourism to the South Gippsland region and found the following:

- the average number of adults in a group was 2.26 and this was similar for day and overnight visitors;

- the most common number of nights spent was 2 and the average was 3.12;
- overnight stay average expenditure per person per night was \$ 100;
- the average per person per night spend of those staying at Wilson's Promontory, and therefore more likely to be camping, was \$90;
- the average per person spend of adults on a day trip was \$42;
- the average spent on overnight trips per travel party was \$707 with accommodation being the largest expenditure (\$347), however 29% of respondents spent nothing on accommodation;
- interestingly 29% of overnight travel parties did not spend any money on take-away or restaurant food and 31% did not buy groceries;
- opportunities to boost visitor expenditure are apparent particularly the purchase of accommodation, food and beverages, gifts, activities and entertainment.

Visitor motivations for travel to Prom Country over the summer period were explored and revealed that experiencing nature was the top motivation closely followed by the need for rest and relaxation and escape from the city.

Overall, visitors indicated that they were happy with their visit to Prom Country. When asked to rate their satisfaction with specified attributes, the Visitor Information Centre, friendliness of local businesses, the brochures, attractions and accessibility were most highly rated. The areas that provided least satisfaction were the destinations website, the variety of accommodation, public toilets and the variety of food and shops.

Interestingly mobile reception was generally satisfactory apart from Vodafone customers who indicated dissatisfaction with coverage.

Although there were bushfires in the Gippsland region during the period of this survey, less than 50% of respondents knew about the fires; however those that were aware of the bushfires were not impacted by them.

Recommendations resulting from this study include:

- Developing products that appeal to all age groups and stimulate expenditure;
- Promotion of the regions food and beverage outlets targeted at couples;
- Given that many visitors to the region have a low household income consider offering low priced products that provide novelty and value such as farmers markets;
- Accommodation packages that include meals at local restaurants could be developed and targeted to higher yield visitors;
- Travel routes that encourage 'stop, try and buy' behaviour should be promoted via the internet and Visitor Information Centres;
- Themed travel routes could encourage visitation to less popular attractions;
- The regions internet sites must be kept up to date and provide adequate online booking facilities utilising cooperative marketing packages;
- Utilise social media outlets to encourage greater word of mouth promotion; and finally
- The implications of poor reception for Vodafone customers must be considered and addressed.



## 2. Introduction

This study was commissioned by the South Gippsland Shire Council (SGSC) to collect primary data in order to examine the economic impact of tourism in South Gippsland, otherwise referred to as Prom Country. In particular, SGSC wished to attain detail with regards to visitor spend, visitor numbers and length of stay as well as a detailed profile of the current visitor market, taking into account the seasonal variations that occur between summer, autumn and winter.

This preliminary report is the first of two and presents the findings from the quantitative data collected over the 2012/13 summer period. The report will provide significant detail regarding the following:

1. The demographic background of South Gippsland's visitor market
2. The types of information South Gippsland's visitor market source when planning their trip
3. The travel behaviour of South Gippsland's visitors including, activity preference, accommodation, mode of travel, length of stay and travel patterns
4. The economic impact of tourism in South Gippsland during the summer of 2012/13
5. The motivations of the visitor market and reason for travel
6. The visitor's satisfaction with their South Gippsland experience

In addition to the above, this report will provide some insight into the impact that the 2013 bushfires that occurred in other regions of Victoria had on the visitor experience.

Following the presentation of results, a number of recommendations specific to the summer season are made to SGSC to assist in the identification of investment opportunities and growth areas, the development of effective marketing strategies and how the region can enhance the tourism related economic flow-on effects to the broader region.

It is important to note when reading this report that over one third of respondents were either camping or caravanning in the region's national parks. This will evidently have an impact on their average spend while visiting the region.



### **3. Methodology**

A survey design provides a quantitative measure or numeric description of trends, attitudes and or opinions of the population of interest through the study of a sample of the population, which in the case of the current research included individuals who visited South Gippsland. To ensure the research produced quality data that represented the needs of the region, the items in the survey instrument were guided by prior research conducted in the region and consultation with the Executive Officer of Prom Country Regional Tourism and tourism representatives from South Gippsland Shire Council. A total of 31 questions were included in the questionnaire, some of which included multiple item responses designed to provide the researchers with high level measurement scales which in turn allowed for sophisticated statistical analysis. See Appendix A for a copy of the questionnaire.

#### **3.1. Procedure**

Data were collected via two methods. The first method included the distribution of a survey pack to tourists visiting the region. This included the questionnaire, an introductory letter and a voucher that entitled the participant to a free coffee on presentation of the completed questionnaire at a nominated food and beverage outlet. The survey packs were distributed by selected operators. Via this method a total of 392 usable<sup>1</sup> responses were obtained. The second distribution method utilised an online version of the questionnaire and members of the region's consumer data base were emailed and invited to respond. One hundred and seventy one usable responses were received via the online survey.

The data from a total of 563 completed questionnaires were entered into a statistical software program (SPSS) and subjected to a number of systematic quality and validity checks prior to analysis. The results from the quantitative analysis are presented in Section 4.

### **4. Results**

This section presents the results of the data collected over the 2012 / 2013 summer season. This section commences with a demographic profile of Prom Country's summer visitors followed by details regarding the types of information visitors use when planning their trip and their travel behaviour. Findings relating to the visitor's economic contribution to the region are then discussed in detail. Following this, visitors key motives for visiting Prom Country are revealed along with their satisfaction with their stay in the region. Finally, a brief mention is given to the impact of the summer bushfires that occurred in the Gippsland region on the visitor's experience.

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<sup>1</sup> The questionnaires were screened for validity and reliability purposes. Any questionnaire that exhibited a pattern of non representative responses (extreme scores etc) was not included in the analysis.

#### 4.1. Demographic Profile of Prom Country’s summer visitor market

The demographic data collected in this study provide a detailed description of the sample population and more importantly identify potential market segments which in turn can assist the region to enhance the efficiency of their marketing efforts. The variables employed for this study were; age, gender, postcode or country of origin, relationship status, number of dependants, income and occupation. The results are as follows.

##### 4.1.1. Gender and Age Group

While gender among respondents was over represented by females (62%), the majority of age categories were reasonably spread over the sample. As illustrated in the graph below, with the exception of those under 20 years, and slightly lower representation of those between 21 and 30, the remaining age categories are similar in terms of representation. To this end, there appears to be no distinct pattern when it comes to the age group of visitors over the summer period. However, should the region attempt to target the household decision maker in their marketing efforts, messages should be targeted towards females over 40 years of age.

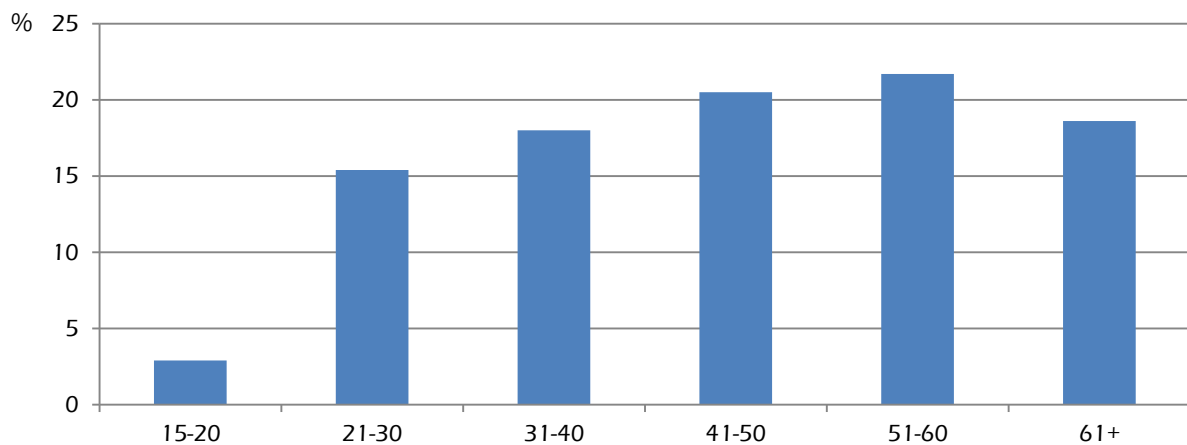


Figure 1: Age of visitors

##### 4.1.2. Relationship Status and number of dependents

With over 88% of respondents stating they were either married or in a partnership, it appears that Prom Country is not a place for singles over the summer period. Only 45% of those in a partnership claimed to have between 1 and 3 dependent children indicating that quite a significant number of visitors are travelling without children.

##### 4.1.3. Place of Origin

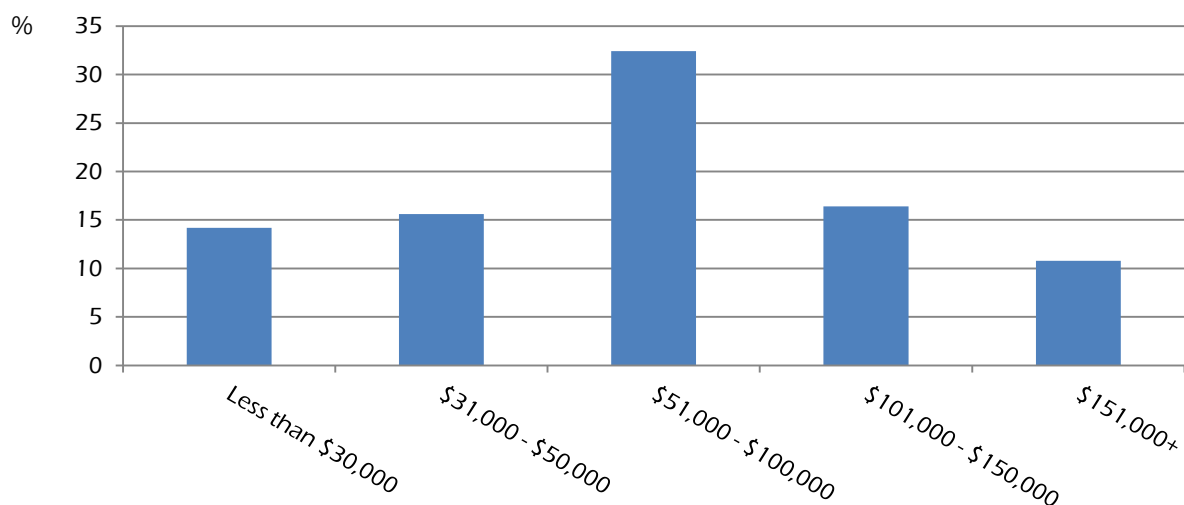
Place of origin was assessed via postcode data for domestic visitors and country or region of origin for international visitors. International visitors represented 19% of respondents and of these 11% were from Europe, 4% from the United Kingdom and the remaining international visitors were from Asia and the USA. Germany was well represented among the European respondents, suggesting that Prom Country appeals to this geographic market.

The post code data, while revealing no significant patterns in terms of precise location, did indicate that the majority (71%) of summer visitors were from Victoria. This is consistent with the previous market research study conducted in 2010 that also positioned Prom Country as a popular destination for Victorian intrastate tourists. Neighbouring states of New South Wales (11%) and South Australia (11%) were also represented among the sample and remaining 7% of visitors were from Queensland and Tasmania. There was little or no representation from the ACT, Western Australia or the Northern Territory.

#### 4.1.4. Occupation and Household Income

The occupations among the respondents were vast and varied and while an attempt was made to categorise those listed, no distinct patterns emerged. As a result, the researchers conclude that Prom Country’s visitor market comprises a wide variety of professional backgrounds and cannot be defined by one or few specific categories.

The respondents’ income brackets are illustrated below in Figure 2. The findings are somewhat consistent with those of the 2010 study, with the most common income bracket again being between \$51,000 and \$100,000. Considering this is ‘household’ income, and taking into account the combined representation of those who noted their income as \$50,000 and below, this indicates that the majority of Prom Country’s summer visitors are low to middle income earners. However, as 30% of respondents reported their combined income as being \$100,000 and above there is a need for caution when considering the key markets to be catered for in terms of product offering.

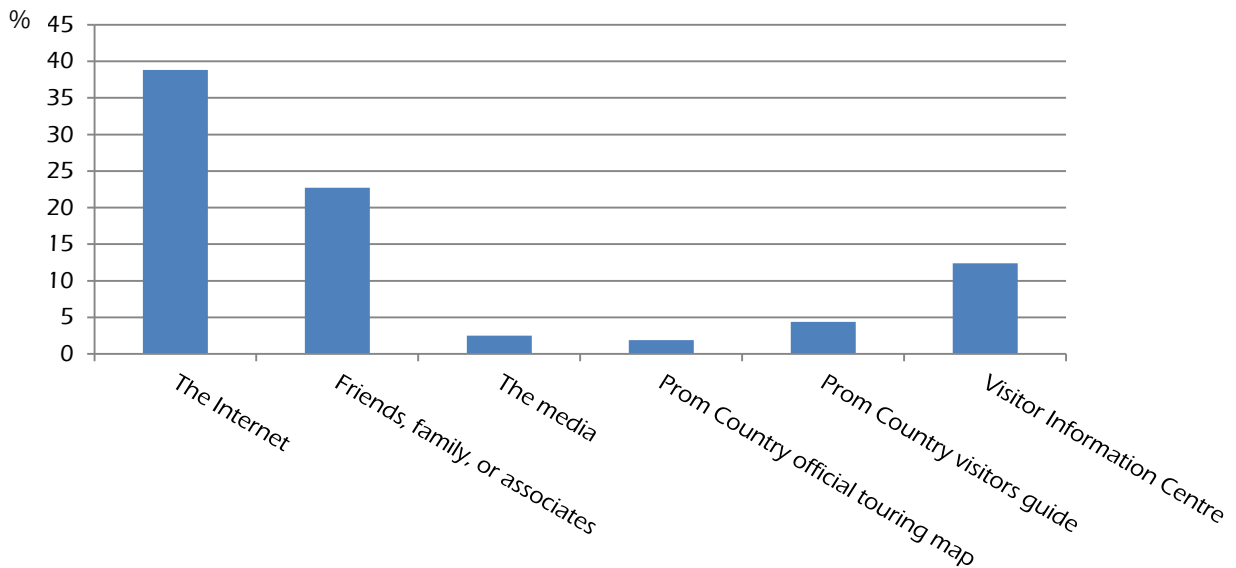


**Figure 2: Household income**

#### 4.2. 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. Not surprisingly, this research revealed the Internet as the number one information source used by visitors when planning their visit to Prom Country. Following this however was friends and family, indicating that word of mouth is a potentially powerful information source for Prom Country’s tourism providers. The visitor information centre was also utilised by visitors to access information and therefore continues to be an

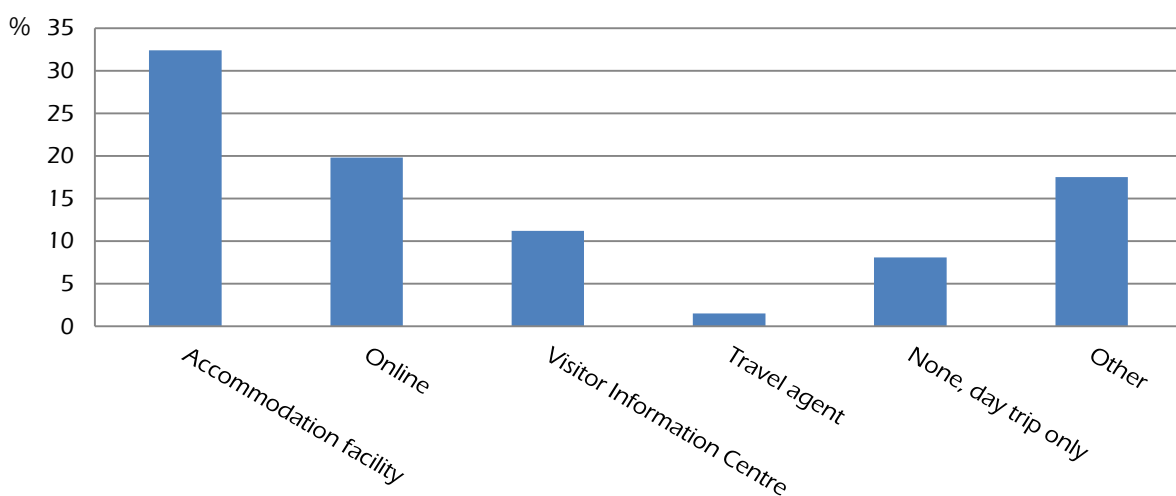
important asset to the region. Few people referred to the media or the official touring map and intuitively this makes sense given that the media is more often than not used to create awareness as opposed to providing information and it is unlikely that the official touring map was available to visitors prior to their trip. In interpreting these results however, it is important to remain mindful that the majority of visitors may have had little need for information due to their past visitation patterns. These results are illustrated in the chart below.



**Figure 3: Visitor information source**

### 4.3. Accommodation Booking

As indicated in Figure 4, despite conducting their information search online, many visitors booked their accommodation directly with the provider. There is little evidence of the use of travel intermediaries apart from the Visitor Information Centre which again reinforces its importance. Among the ‘other’ booking sources were; caravan clubs, free campsites and holiday homes which didn’t require bookings and those made by someone else in the travel party.



**Figure 4: Accommodation booking type**

#### 4.4. The travel behaviour of South Gippsland's Visitors

The results presented in this section reveal the actual travel behaviour of Prom Country's summer visitor market. 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.

##### 4.4.1. Travel Party

50% of summer visitors were travelling with 1 to 2 people, providing support for the finding above relating to the presence of the couples market. Groups of 3 to 4 people made up 36% of responses and could be assumed to be those travelling as a family. Larger groups of 6-10 people comprised 7% of respondents and 6% of respondents were travelling in groups of 10 or more.

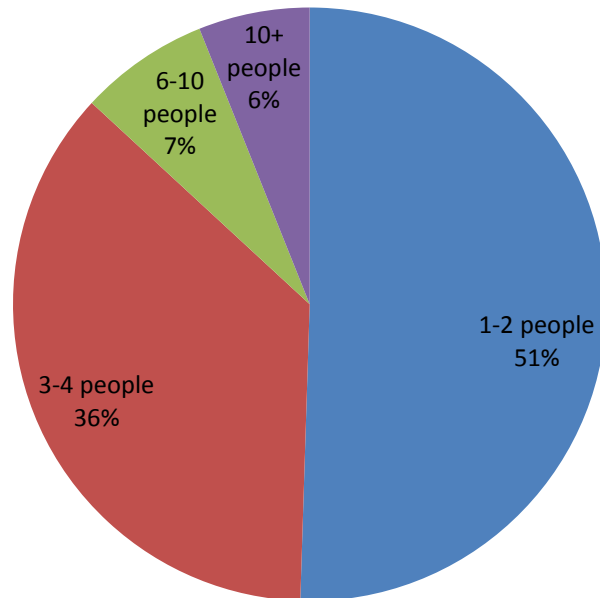


Figure 5: Size of travel party

##### 4.4.2. Past Visitation to Prom Country

Prom Country appears to have a loyal visitor market in the summer season with 63% of respondents stating they had been to the region before. Of those that had previously visited the region, 55% had visited the region once or twice over the past five years, 17% had visited three to four times and 28% claimed to have visited the region on an annual basis.

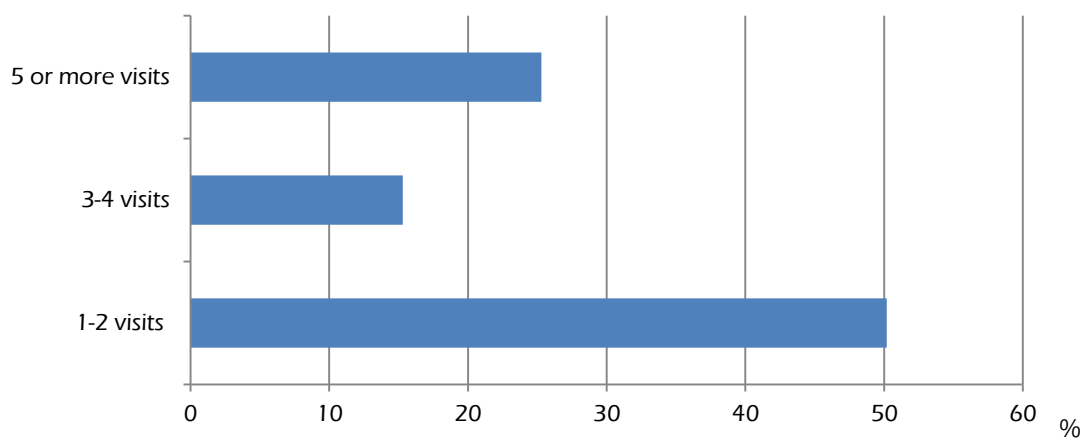


Figure 6: Frequency of visits for repeat visitors

#### 4.4.3. Length of Stay and Accommodation Preference

The average number of nights visitors stayed in Prom Country was four with the maximum being 30 and the minimum being one. This figure is slightly higher than that of the previous study that cited the average length of stay as 3 nights.

With regards to accommodation, camping and caravanning combined represented 44% of respondents which is representative of the fact that over one third of respondents stayed at Wilsons Promontory. Of these 5% of respondents utilised free camping sites, and 39% paid for their sites. Only 16% utilised serviced accommodation such as Hotels (8%), Bed and Breakfasts (8%) while 13% stayed in self catering apartments and 9% holiday houses. The remaining 19% of overnight visitors stayed with family or friends.

#### 4.4.4. Where overnight visitors stayed

Thirty seven percent of overnight visitors stayed at Wilsons Promontory – this would represent a large majority of the campers and caravaners. Foster appeared to be the next most popular township – 18%, followed by Inverloch (10%) Fish Creek (7%) and Walkerville (6%). The remaining 14% comprised a variety of townships but no pattern was evident – suggesting that when you disregard Wilson’s Promontory, the visitors are reasonably well dispersed throughout the region with the exception of the townships that extend past Mirboo North towards the Latrobe Valley.

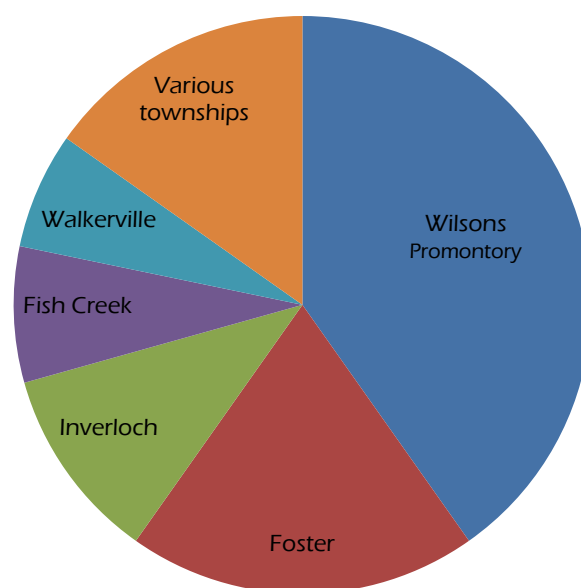


Figure 7: Place of stay

#### 4.4.5. Where visitors spent most of their time

When asked to specify the towns or areas they spent the majority of their time, again there was some strong representation of the Prom. However, townships such as Foster, Inverloch and Fish Creek were also popular among visitors. There was no real pattern evident among the responses to reveal the most popular townships but this is not a bad finding for Prom Country as this does demonstrate that visitors are well dispersed in terms of their travel patterns.

#### 4.4.6. Mode of Transport

The fact that 95% of visitors had their own vehicle (12% hire car) would explain the dispersion of tourists mentioned above. Less than 2% travelled by bus and 3% listed other transport arrangements that mainly cited another visitor’s vehicle as their mode of transport.

#### 4.4.7. Travel Party

The figures charted below signify that Prom Country in the summer months appeals to families and couples. This finding differs somewhat from the previous research that was



undertaken in 2010 that strongly represented the couples market, but this difference can be explained by the fact that the current research captured the responses of school holiday makers, many of whom are families. Those travelling with friends were also present to a degree but business travellers, those travelling alone or with a tour group were few and far between.

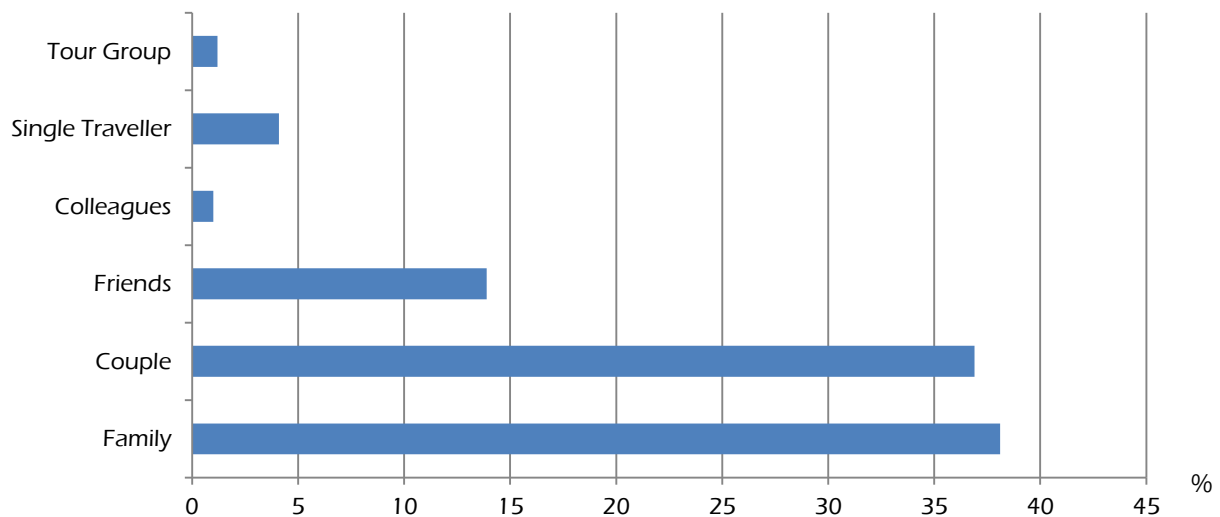


Figure 8: Travel party

#### 4.4.8. 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 activities.

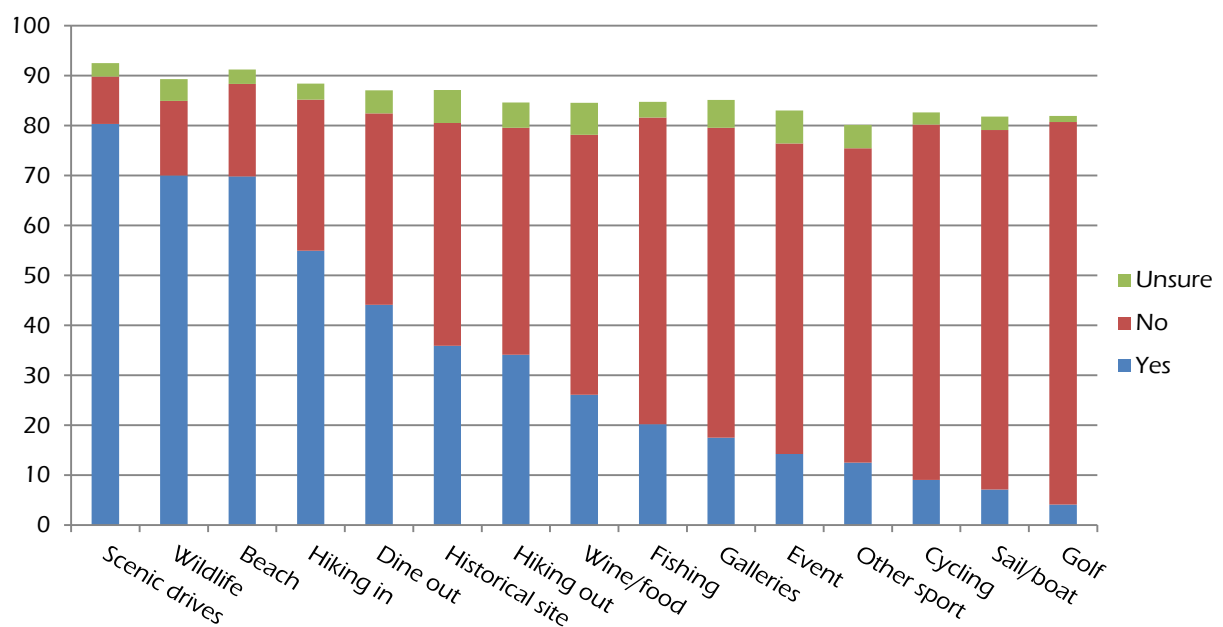


Figure 9: Preferred activities

As indicated in the chart above, the most popular activities among visitors include scenic drives, exploring the local wildlife, beach activities and hiking within Wilson’s Promontory National Park. These top three activities are in line with those revealed in the previous research, indicating a degree of consistency in the region’s product offering and

positioning strategy. There was also moderate support for hiking outside of the Prom and visiting historical sites and museums, while dining out was also an activity sought by over half the respondents.

Activities that were less popular with summer visitors included attending festivals and events (which could be representative of the lack of such activities in the region during this season), cycling, visiting art galleries, food and wine trails, golfing and sailing.

#### 4.4.9. 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. The results are charted below.

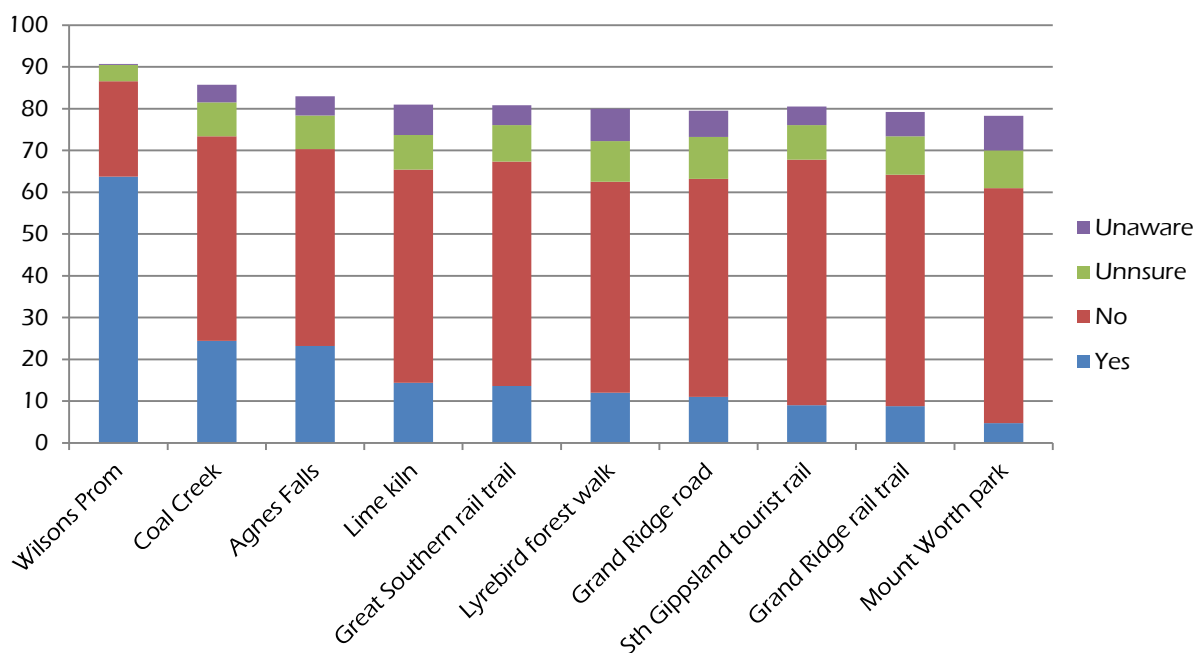


Figure 10: Preferred attractions

It would not be a surprise to learn that Wilson’s Promontory is the region’s number one attraction; hence this analysis will focus on those attractions that appear to be less popular. While awareness does not appear to be a significant issue among visitors in that the majority evidently know these attractions exist, their interest in visiting the attractions would be a concern for operators in the immediate or surrounding vicinities. As outline previously tourists are mobile, hence transportation is not an issue, and visitors are well dispersed throughout the region. Given the issue doesn’t appear to be with awareness, it may be that the promotional material for these sites may need revising or visitors, while aware, are simply not informed of the benefits and experiences visiting these sites can offer. Recommendations in this regard are made in the final section of this report.



#### 4.5. The economic impact of tourism in South Gippsland during summer of 2012/13

In order to estimate the economic contribution of tourism to Prom Country, respondents to the survey were asked to estimate how much they, or their group, would spend while on their trip, on each of 15 categories of items. These items were developed based on previous research (Driml and McLennan 2010), categories used in surveys conducted by Tourism Research Australia (2012 a, b) and relevance to Prom Country. Respondents were given the option of nominating a money value or to check 'Not Applicable' for each item. The data were edited carefully to check that the value of \$0 was entered where visitors spent nothing on that item and a 'missing value' was identified where no clear answer was given. For example, for accommodation, many respondents spent \$0 and we know from a previous question that they were on a day trip, staying in their own holiday house or with friends, or camping for free. However those who indicated that they stayed in commercial accommodation or the national park, but did not supply a dollar value estimate for accommodation expenditure, were given a 'missing value'.

Respondents were also asked how many people over 15 years of age they were estimating for in their group and how many nights their trip was in total. The aim of these two questions was to allow estimation of 'average expenditure per person' and 'average expenditure per person per night'; in order to compare this to and make the data consistent with data published by Tourism Research Australia (TRA) for tourism regions in Australia. The focus on people over 15 years of age (we will term them 'adults' in the rest of this discussion) means that the number of people per group used in this economic analysis differs from the travel party information reported earlier, which includes children.

While most (95%) groups were of 5 adults or less, there were a few responses where the number of adults per group was larger. To avoid these few large numbers skewing the results, data were trimmed to eliminate the highest 5%. This also eliminated most tour groups and thus avoids potentially unreliable estimates by respondents on behalf of large tour groups. There were a number of respondents on day trips, so zero nights was a valid response. The number of nights was trimmed at the high end to include 95% of responses and the maximum number of nights used for the economic analysis was therefore 13 nights.

There were a number of missing values recorded for number of people, number of nights and for individual items of expenditure. While this is unfortunate, it is expected when gathering this type of detailed data, especially by self-administered survey or online. Despite this, the sample size of usable responses is very good for overnight trips. A larger sample size would be desirable for day trips, but this will be addressed as two further survey periods are planned.

The key results calculated are:

- 'average (mean) expenditure per trip' for day and overnight trips (domestic and international visitors)
- 'average (mean) expenditure per person' for day trips and overnight trips (domestic and international visitors)

- 'average (mean) expenditure per person per night' for overnight trips (domestic and international visitors)

In calculating these, all responses with missing values for number of people, number of nights or expenditure on any items were dropped from the analysis. In all cases, the remaining usable sample size is reported.

#### 4.5.1. Number of adults and number of nights

The most common (mode) group size (65%) was two adults and the average (mean) number of adults in a group for all trips was 2.26. Results were very similar for day trips and overnight trips. The usable responses on number of nights spent in Prom Country included 80 day trips and 408 overnight trips. For the overnight trips, the most common number of nights spent in Prom Country was 2 and the average was 3.12 nights.

	All trips	Day Trips	Overnight trips
Mode	2	2	2
Mean	2.26	2.24	2.26
Minimum	1	1	1
Maximum	5	5	5
Valid responses	521	72	387

Table 1: Number of adults on trip

	All trips	Day Trips	Overnight trips
Mode	2	0	2
Mean	3.12	0	3.74
Minimum	0	0	1
Maximum	13	0	13
Valid responses	488	80	408

Table 2: Number of nights per trip

#### 4.5.2. Expenditure on all items

##### Overnight Trips to Prom Country

For those visitors who stayed overnight in Prom Country, the average expenditure for the travel party per trip was \$707, per person was \$310 and per person per night was \$100. Less than one percent of respondents spent \$0 but this is possible if staying in free accommodation and sourcing supplies outside Prom Country.

	Per trip	Per person	Per person per night
Average	\$707	\$310	\$100
Minimum	\$0	\$0	\$0
Maximum	\$4,500	\$1,800	\$455
Valid responses	349	334	334

Table 3: Average expenditure, all overnight trips

Approximately ten percent of respondents spent less than \$20 per person per night. Approximately sixty percent of respondents spent \$100 or less per person per night.

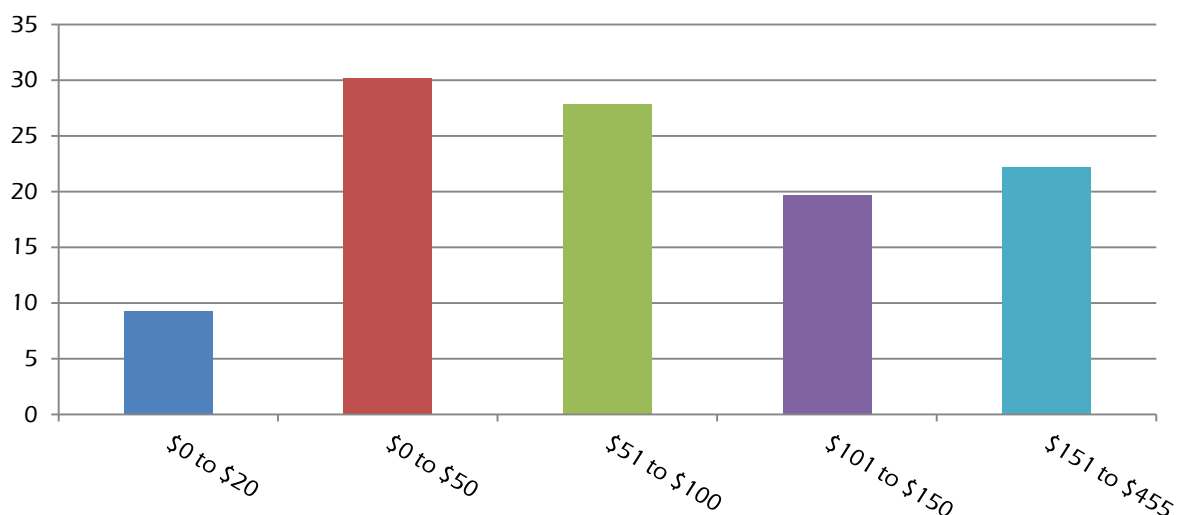


Figure 11: Overnight trips, expenditure per person per night

A selection was made of overnight visitors who reported that Wilson’s Promontory was their main town of stay, in order to see if their expenditure was different to other visitors, especially as more of these visitors may be camping. The average expenditure was: per trip was \$721, per person \$315 and per person per night \$90. While the per person per night expenditure was somewhat lower than for all overnight trips, it was not a remarkable difference.

The sample was split into visitors of Domestic (Australian) and International origin to see if there was much difference between these groups and for later comparison with published data from TRA. International visitors appear to spend more, but the sample size for this group is smaller so this must be taken into account when interpreting the results.

	Average per trip	Average per person	Average per person per night
Domestic visitors	\$746 (278)	\$314 (263)	\$94 (263)
International visitors	\$551 (71)	\$296 (71)	\$120 (71)

(Number of valid responses in brackets)

Table 4: Average expenditure, domestic and international overnight trips

#### Day trips to Prom Country

There were 80 respondents who indicated that they were on a day trip to Prom Country. The average expenditure by these travel parties per trip was \$114 and per person for the day was \$42.

	Per trip	Per person
Average	\$114	\$42
Minimum	\$0	\$0
Maximum	\$1185	\$200
Valid responses	70	65

Table 5: Average expenditure, day trips

### 4.5.3. Expenditure patterns

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. 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.

#### *Overnight trips to Prom Country*

Respondents on overnight trips spent on average \$707 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, 29% spent no money on accommodation as they 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	\$347
Take-away and restaurant food	\$81
Groceries	\$78
Petrol	\$55
Camping fees	\$31

Table 6: 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:

- 29% of respondents did not spend any money on accommodation,
- 29% did not spend any money on take-away and restaurant food,
- 31% did not buy groceries in Prom Country.
- 37% did not buy petrol in Prom Country and
- 74% did not spend any money on camping fees

Discretionary expenditure on items including gifts (\$25 trip) and activities and entertainment (\$12 per trip) was low. This suggests that there are limited opportunities for such expenditure and/or respondents are trying to keep costs down.

This information is based on a minimum of 364 responses where there was information provided on expenditure on items.

### *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	\$47
Groceries	\$16
Petrol	\$16
Gifts	\$14
Activities and entertainment	\$10

**Table 7: 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,
- 72% did not buy groceries in Prom Country,
- 72% did not buy petrol in Prom Country,
- 60% did not spend any money on gifts, and
- 80% 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.

This information is based on a minimum of 71 responses where there was information provided on expenditure on items.





#### 4.5.4. Comparison with published data

Tourism Research Australia publishes regional profiles based on data gathered via the International Visitor Survey and the National Visitor Survey. The profiles for 2011-12 have currently been withdrawn for revision. However, data from the previously released profiles are reported here with the proviso that these will be updated. It is expected that general points made here will be consistent with the updated profiles. A map of Victoria's tourism regions is shown below:

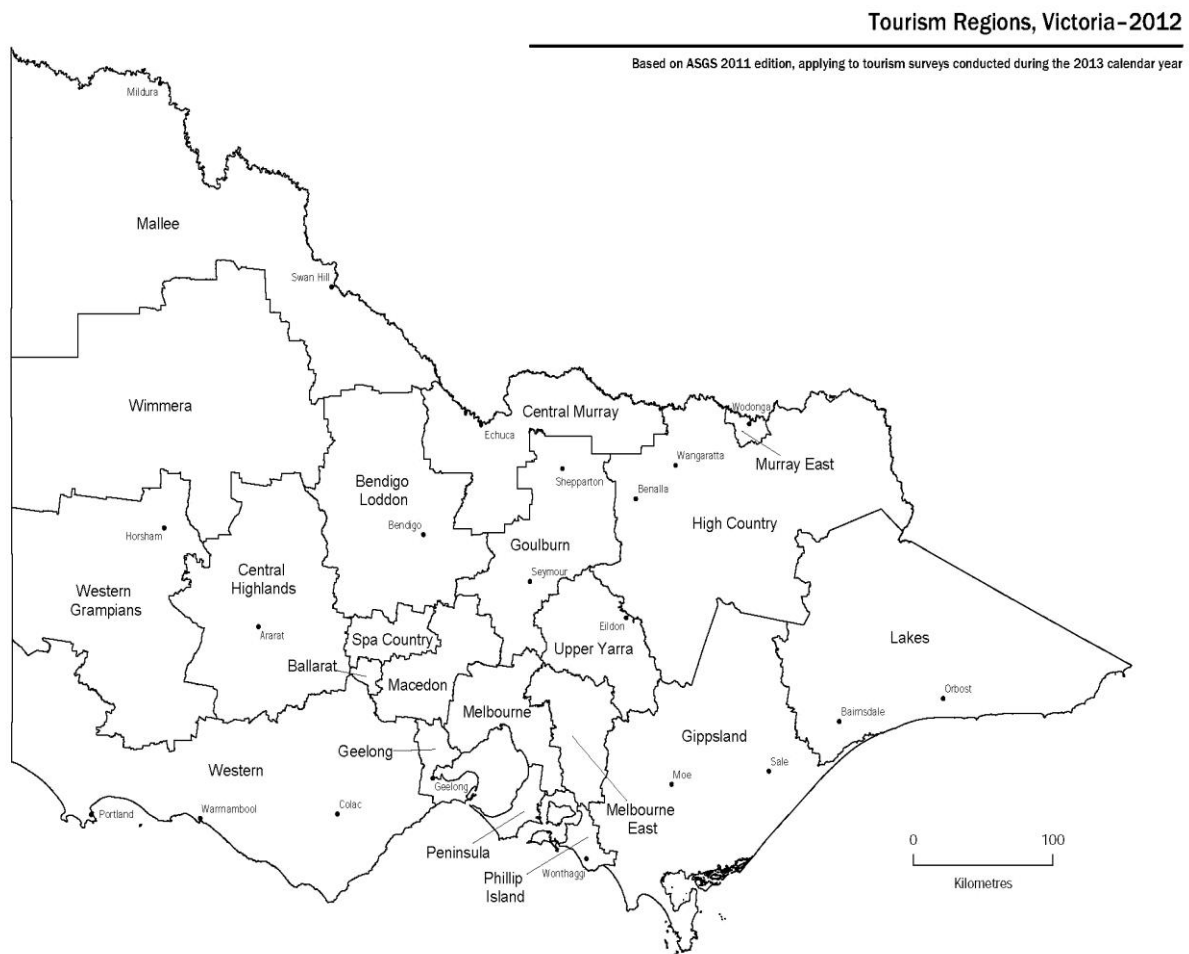


Figure 12: Map of Victoria's tourism regions

The estimates published are for 'average expenditure per person' and 'average expenditure per person per night' and include day trips and domestic and international overnight trips. A summary of relevant Prom Country results for these variables is in Table 8.

Average expenditure	Per person per trip	Per person per night
Day trip	\$42	Na
Domestic overnight	\$314	\$94
International overnight	\$296	\$120

Table 8: Results for Prom Country, Summer 2013

Firstly, published results for Victoria and Melbourne are shown in Table 9.

Average expenditure	Victoria		Melbourne	
	Per person	Per person per night	Per person	Per person per night
Day trip	\$100	na	\$118	na
Domestic overnight	\$559	\$186	\$836	\$301
International overnight	\$2,430	\$98	\$2,354	\$102

Table 9: Tourism Research Australia, Regional Profiles 2011-21, Melbourne and Victoria (note currently under revision)

Secondly, published results for some coastal regions, including Gippsland, are shown in Table 10.

Average expenditure	Gippsland		Peninsula		Phillip Island		Western	
	Per person	Per person per night	Per person	Per person per night	Per person	Per person per night	Per person	Per person per night
Day trip	\$80	na	\$65	na	\$111	na	\$96	na
Domestic overnight	\$223	\$88	\$338	\$109	\$349	\$124	\$443	\$142
International overnight	np	np	\$995	\$74	np	np	\$541	\$143

na = not applicable (day trip only), np=not published

Table 10: Tourism Research Australia, Regional Profiles 2011-21, Victorian coastal regions (note currently under revision)

It is clear that for Victoria as a whole, the influence of high expenditure in Melbourne boosts the state average expenditure. However, this means that expenditure in regional Victoria is generally lower than the state average.

For overnight visitors, the results generated for Prom Country are consistent with other similar regions in eastern Victoria, but lower than in the Western region. For day trips, the results estimated for Prom Country are lower than for day trips in any of the published Victorian regional profiles. As the Prom Country results are just for the summer season and a smaller sample size than for overnight trips, it is worth withholding conclusions about the size of this expenditure until a larger sample covering more seasons is available.

#### 4.5.5. Discussion

The expenditure study has revealed that visitors to Prom Country do bring money into the region at a rate of around \$700 per overnight trip and \$42 per day trip. While this is a valuable contribution to the economy, it is obvious from the summer season results that expenditure by overnight visitors is low relative to Victoria as a whole but similar to other coastal regions. The day trip estimate is low compared to all Victorian regions.

On examination of expenditure 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.

#### 4.6. Primary Motivations of the Summer Visitor Market

Table 11 below presents the mean motivational scores recorded using a 5-point likert scale ranging from 1 = strongly disagree to 5 = strongly agree. These seven key motivations are commonly used to represent the reasons tourists take a leisure holiday. The top motivation for the summer leisure visitor is to experience nature, closely followed by the need for rest and relaxation. This aligns well with the broader region’s nature based positioning strategy and provides positive feedback in terms of the desired market position. Rest and relaxation was noted as the primary motivation for visitors who took part in the previous research in 2010, however, the natural scenery was noted as the number one reason people chose Prom Country over other destinations. Overall, nature, rest and relaxation and escape from the city appear to be the main drivers of visitation and Prom Country and the region is perfectly placed to offer this experience.

A small proportion of visitors (12%) were visiting the region for reasons other than leisure. Their reasons for visiting included visiting friends and relatives, business and those that were passing through to get to another destination.

Motivations	Mean
To experience nature	4.40
Rest and Relaxation	4.36
Escape from the City	4.12
Experience something unique	4.08
Spend time with my partner	4.04
Spend time with family	3.80
Spend time with friends	3.49

Table 11: Primary motivation for visit

#### 4.7. The visitor’s 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 are listed in descending order in Table 12. The fact that the majority of all scores listed below are over 3 indicate that visitors overall were happy with their experience in Prom Country. The attributes that were most appreciated include the Visitor Information Centre, the friendliness of local businesses, the brochures, attractions and accessibility. Those one would class as ‘good’ were the signage, quality and value of accommodation and picnic areas. The areas that could potentially be in need of improvement include the destination’s website, the variety of accommodation on offer, public toilets and the variety of food and shops, although the results indicate that while these could be considered as average, respondents were certainly not dissatisfied with these features.

Attributes	Mean
Visitor Information Centre	4.20
Friendliness of Local Businesses	4.13
Brochures	4.10
Quality of Attractions	4.10
Variety of Attractions	4.05
Accessibility of Attractions	4.00
Signage	3.95
Quality of Accommodation	3.89
Picnic Grounds and BBQ Areas	3.88
Value of Accommodation	3.82
Prom Country Web Site	3.77
Variety of Accommodation	3.77
Public Toilets	3.73
Variety of Food Establishments	3.71
Variety of Shopping	3.70
Mobile Reception	3.31
Quality of Roads	3.10

Table 12: Visitor satisfaction with experience

#### 4.8. Mobile Carrier

While it appeared on the whole that respondents were generally satisfied with their mobile reception, an independents groups t-test revealed that Vodafone customers were dissatisfied with the quality of mobile reception while visiting the region with the majority rating their satisfaction with the coverage a 1 or a 2.

#### 4.9. The impact of the summer bushfires on the visitors' experience

Given the bushfire activity that occurred in Gippsland over the 2012/13 summer, online respondents (i.e. those who were completing the questionnaire after as opposed to during their visit to Prom Country) were asked to comment on the impact that these fires had on their experience and/or their intention to return. The statements to which respondents rated their level of agreement with (1= strongly disagree to 5 = strongly agree) were created by the researchers based on a review of past research. These statements typify the kinds of behavioural responses tourists may undertake when natural disasters occur either near or in the immediate vicinity of where they are located.

It is important to note when interpreting the results below that according to the screening question that asked respondents to note their awareness of the fires, less than 50% actually knew about the fires. The responses of those that did know about the fires indicate that the bushfire activity during the summer had a minimal impact on the visitors stay and these are presented in the table below.

Response	Mean
I would be prepared to visit Prom Country again in the summer months despite the possible risk of bushfire activity	4.20
The fires had no impact on my holiday	4.10
I knew the fires were not close by and felt safe in Prom Country	4.08
I generally check weather conditions or the CFA website prior to holidaying in regional Victoria during the summer	3.88
I was able to access the information I needed to make an informed decision regarding whether to leave or stay in Prom Country	3.87
On hearing of the fires I had concerns for my welfare	2.47
I was confused as to the precise location of the fires and how close they were to me	2.16
If I had of known that there would have been bushfires in Gippsland I would not have gone ahead with my trip to Prom Country	2.02
I decided to cut my holiday short and return home on news of the bushfires	1.80

**Table 13: Impact of bushfires on visitor experience**

It is important for any destination prone to bushfires to understand the potential impact the fires can have on their visitors' experience and more importantly their safety. According to these results, bushfire activity in the broader Gippsland region is not likely to deter visitors from coming to Prom Country and visitors appeared to have some understanding of the precise location of the fires in relation to Prom Country. The fact that visitors felt they were able to access the necessary information to alleviate any concern indicates that fire relevant communication within the region is managed well and does not inflict unnecessary panic among visitors who are unlikely to be at risk.



## 5. Conclusions and Recommendations

### 5.1. Product Development

The research has revealed that in the summer months, Prom Country appeals to a variety of age groups. With the family market representing close to 50% of visitors, it is important that the product offered by the region caters to all ages. Previous research undertaken in the Gippsland region has indicated that need for activities that are suitable for families to undertake together and also those that offer an opportunity for children to play while parents relax. While outdoor activities likely to be undertaken in the national parks and beaches provide for this, it is acknowledged that such activities stimulate minimal expenditure. It is therefore recommended that South Gippsland consider introducing services and entertainment options that stimulate expenditure within or in the immediate surrounds of their natural attractions.

Mindful of the developmental restrictions within National parks, examples of services and activities could include: mobile coffee and ice-cream vans, beach markets, surfing or fishing lessons for children and guided interpretive all inclusive nature based tours that include local food and beverage supplies. Small scale mobile attractions that can be utilised purely during the summer months (e.g. bungee trampolines, jumping castles) could also be considered to encourage spending, however, one would need to ensure these are sourced locally to avoid economic leakage.

Such product ideas are not limited to Wilson's Promontory National Park. The research revealed that other natural sites within the region such as the Walkerville

Lime Kilns, Lyrebird Forest Walk and Mount Worth State Parks could introduce guided interpretive tours that include catering and commentary from qualified rangers. Local arts and crafts markets could also be hosted within or near these sites to encourage site visitation, enhance awareness and showcase the work of local artists. The study revealed that visiting art galleries was not high on the summer visitors' list of things to do – perhaps taking the art to them will again provide opportunities for expenditure.

The combined household income level of summer visitors and those revealed in past research indicate that Prom Country is perceived as offering a relatively low cost holiday. The economic figures revealed in this study confirm this. Food and beverage expenditure is particularly low and given almost half the visitors are travelling without children, there is an opportunity to entice these travellers to local restaurants and wineries. Couples travelling alone can dine out without having to think about childcare or the added costs of catering for the entire family. Restaurants should be encouraged via their PCRT to promote their food and beverage operations to the 'couples' market to firstly inform this market about the food and beverage facilities available and secondly discourage self catering. Families could also be tempted to dine out with 'value for money' style promotions and children's meals at reasonable prices.

Taking the low yielding visitor needs into consideration, the researchers recommend a wide variety of low priced product offering novelty and value for money be considered. Examples include;

farmers markets selling local produce and products unique to the region, small scale festivals and events such as 'traditional country fairs', local music festivals and food and wine festivals that promote the cuisine of local restaurants.

Packages that include accommodation and meals at local restaurants targeted towards the higher yielding visitor will also increase awareness and expenditure on food and beverage.

The good news for Prom Country is that tourists are very mobile with the majority having their own transport. This explains the reasonable visitor dispersal throughout the region but the subsequent expenditure indicates that visitors need more encouragement to stop, try and buy. Planned travel routes therefore play a crucial role in the education of visitors. The results indicated that the internet is the main source of information for visitors when planning their trip. However, the travel routes and information currently on offer, while providing historical and factual information about the region and a variety of self guided travel routes, tend not to stimulate expenditure. Integrating travel routes with specified shopping and dining 'rest points' is therefore recommended.

Prom Country could also charge a premium for inclusion in such routes to participating retailers – the funds from which could go to upgrading the website features and functions that may also stimulate expenditure.

There is also an opportunity for Prom Country to 'theme' their travel routes to increase visitation to less popular attractions. Nature based themes are

evidently going to prevail given the nature of Prom Country's primary product and the motives of visitors, however, the findings also suggest there are opportunities for 'historical travel routes'; routes for train enthusiasts; routes for arts and crafts enthusiasts and routes for those who enjoy cycling and walking – which are already listed on the site. Bike-hire and service facilities should also be available and promoted via the web site.

## **5.2. Promotion**

Domestically, the findings indicated that the majority of those who visited Prom Country in the summer were from within Victoria and it is therefore advised that the majority of promotional activities are targeted towards the intrastate market. When considering where to focus international marketing efforts, Europe and in particular Germany would be a receptive market place. Germans are renowned for their love of nature based tourism activities and therefore represent significant product – market alignment for the region.

Again, as the internet is the primary information source for visitors planning their trip it is essential that the region's tourism site is kept up to date and provides adequate online booking facilities and cooperative marketing packages that make the planning process straight forward for visitors. Product information about those less popular attractions should feature more prominently on the site for example, an 'attraction of the week' could feature on the homepage with a vast array of images and information about the attraction. Links to retailers could also include details about the operator's product (i.e. menus, wines, special deals and promotions, catalogues



etc) as opposed to a broad description of the outlet and information as to its location.

Prom Country has the advantage of a very loyal visitor market in the summer months. The summer visitor market obviously has a close affiliation with the region and with the social marketing sources available to destination marketing organisations there are significant opportunities to generate successful word of mouth activities. Encouraging visitors to 'like' the region on Facebook, competitions that encourage visitors to 'blog' or post commentary and images of their time in Prom Country on the destination's website or other online portals likely to be accessed by visitors are just some examples of what could be done to stimulate word of mouth. The competitions could also feature some of the less frequented attractions to enhance visitation and stimulate interest among those considering visiting the region.

With the unlimited marketing options now available to regional tourism operators via smart phone technology, one needs to be mindful or advised of their intended receiver's mobile carrier. The study revealed that those who use the Vodaphone network have poor reception in the region and therefore may not be able to access the various applications available to visitors. More importantly, emergency services also need to be made aware of this particularly in bushfire season.

It may be advisable for those communicating with visitors before their visit to advise them of the network coverage issues so they have the opportunity to prepare or rethink their mode of communication. It is noted that

this service is available on the Prom Country website; however, one cannot assume that tourists will check this independently.

*“The summer visitor market obviously has a close affiliation with the region and with the social marketing sources available to destination marketing organisations there are significant opportunities to generate successful word of mouth activities”*

## 6. References

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## Appendix A

# 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?  
 March  
 April  
 May
3. How many times, including this trip have you been to Prom Country in the last 5 years?  
 1 -2       3-4       5 or more
4. Via which mode of transport are you travelling?  
 Car (own )       Car (hire)  
 Bus       Other: please specify \_\_\_\_\_
5. Do you intend to visit another destination prior to returning home after visiting Prom Country?  
 Yes (please go to question 6)  
 No (please go to question 7)
6. 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 \_\_\_\_\_
7. 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
8. How did you book your accommodation?  
 Direct with the accommodation facility       None, day trip only  
 Via an online booking facility       Other, please specify \_\_\_\_\_  
 Via the Visitor Information Centre  
 Via a travel agent
9. Did you visit Prom Country for leisure / holiday purposes?  
 Yes (please go to question 10)       No (please go to question 11)

10. I chose to take a break / holiday:	Disagree	Strongly 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					



## **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 group will spend in Prom Country on this trip? Please circle N/A = not applicable if you did/will not spend any money in that category.

	Estimate for your <b>total</b> time in Prom Country
How many people over 15 years of age, including you, is this estimate for?	
How many nights (if any) will you spend in Prom Country?	
Hire car for time in Prom Country	\$ _____ or N/A
Petrol/fuel purchased in Prom Country	\$ _____ or N/A
Vehicle maintenance and repairs in Prom Country	\$ _____ or N/A
Other local transport (bus, taxi etc.)	\$ _____ or N/A
Organised tours and side trips	\$ _____ or N/A
Accommodation (can include food and drink at accommodation)	\$ _____ or N/A
National Park camping fees	\$ _____ or N/A
Camping equipment purchased in Prom Country	\$ _____ or N/A
Takeaways and restaurant meals	\$ _____ or N/A
Groceries, ice etc for self-catering	\$ _____ or N/A
Drinks, alcohol (not already reported above)	\$ _____ or N/A
Shopping, gifts, souvenirs	\$ _____ or N/A
Activities and entertainment (entry fees, museums etc)	\$ _____ or N/A
Conference fees, education fees	\$ _____ or N/A
Other (please specify)	\$ _____ or N/A

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? \_\_\_\_\_
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 +