

Prom Country Tourism Market Research Report

Phase 1: Profiling the Current Visitor Market

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Council and Prom Country Regional Tourism**

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EXECUTIVE SUMMARY

Monash University researchers were appointed to undertake a study for Prom Country Regional Tourism and South Gippsland Shire Council that investigated the motivations, perceptions, travel behaviour and demographic profile of their current visitor market. This research report has been specifically prepared for those responsible for the management and marketing of the Prom Country tourism region, located in South Gippsland.

The objectives of this study were:

1. Determine the types of activities and experiences that Prom Country's current visitor market want in a holiday
2. Determine the current market's preferred accommodation type and how much they would be willing to pay for accommodation currently offered in the region
3. Understand the visitor's motivations for coming to Prom Country
4. Determine the type of attractions that appeal to the current market
5. Determine what is important to the current market when choosing their travel destination
6. Gain insight into the current market's media usage and information search activities when planning a holiday
8. Understand what types of leisure activities the current market generally like to engage in
9. Collect demographic profiling data to better understand who the visitors are and where they come from.

Findings

A two phase study was conducted to address these objectives. Phase one utilised a focus group method and members of Prom Country's visitor market were asked to attend a focus group discussion based on the constructs of interest to the study. The session revealed some important issues and key themes that were used to guide the development of the quantitative questionnaire.

According to those who participated in the focus group, Prom Country is a great place to fulfil the inherent needs that drive their decision to travel. Those needs were recognised as being rest and relaxation, escape from the every day, quality family time and a new and unique experience. Whilst Wilson's Promontory National Park is a major draw card, the

participants were also attracted to the region due to its close proximity to the city, the region's beaches and its surrounding food and wine trails. The focus group suggested that visitors rely on the Internet for most of their information about Prom Country prior to their trip, however, often this information search is triggered by various media sources such as Coxy's Big Break, Post Cards and print publications such as The Age, the Herald Sun and RACV travel magazine. Visitor Information Centres also play an important role in terms of the provision of information with most participants using this service as a means of information during their trip and they were satisfied with the amount of information available to them. The region is most commonly known for its nature based activities and it was also implied that the region offers a versatile experience with some claiming it is a great place for exploration and adventure whilst others perceiving Prom Country as destination that offers rest and relaxation.

The dialogue from the session was interpreted and translated into a survey questionnaire (Phase 2). The 23 item questionnaire designed to capture the opinions of the region's current visitor market was distributed both electronically and via a hard copy version that was administered to visitors by various operators. A total of 559 usable responses were returned and a variety of statistical techniques produced the following findings:

- The average length of stay in Prom Country is 3 days
- Caravan Parks and Self Contained Accommodation represent the most commonly used accommodation
- The majority of visitors prefer to self cater when it comes to meals, but they can be encouraged to eat out
- A significant proportion of the visitors travelled to Prom Country with their partners
- Television plays a significant role in generating awareness of Prom Country, South Gippsland. Second to television is word of mouth,
- The majority of the visitors access their pre trip information via the Internet.
- Whilst visitors were visiting the region, the Visitor Information Centre was the most commonly used information source
- Prom Country visitors are motivated to take a holiday by the need for rest and relaxation, the need to escape the city and to spend quality time with their partner.
- Visitors are attracted to Prom Country by the natural scenery, its 'relaxing' appeal and their interest in natural attractions.

- Experiencing nature, hiking and bushwalking and sightseeing are the top three activities visitors associate with Prom Country.
- When choosing a destination, Prom Country visitors will seek a place that offers an escape from the daily routine, rest and relaxation and nature based experiences.
- A destination must offer value for money, be relaxing and easy to access (hassle free) to be considered by the current visitor market
- The visitor's top three preferred activities wildlife viewing, hiking and bushwalking and reading.
- Self catering accommodation represented the visitor's most preferred accommodation option.
- The majority of visitors would spend no more than \$150 per night on accommodation.
- Visitors prefer to make their own travel arrangements, as opposed to purchasing a package.
- The demographic profiling data suggest that the "typical Prom Country Tourist" is aged over 40 years, is married or in a relationship, has no dependent children, lives in Victoria and is of low to middle income status.
- Three segments were identified in the study based on the visitors' motivations for visiting Prom Country, their preferred leisure activities, sought after holiday experiences and the importance they place on various destination attributes. It was recommended that two of the three segments be pursued - 'Relax with Nature' and 'City Slickers'.

Recommendations

The key recommendations made to Prom Country are centred around four key marketing elements; positioning, product development, pricing and promotion. These recommendations were made with reference to the primary market segments that emerged from the research. They included:

- The results revealed that Prom Country is positioned as a destination that offers nature based experiences and the opportunity to rest and relax. It is currently renowned for its natural attractions, hiking and bushwalking trails and scenery. It is recommended that the region continue to promote these attributes or 'pull factors' particularly the rest and relaxation component as this represents the visitors' number one motivation for taking a holiday.

- The region should not be positioned as one that offers an 'action packed' adventure type experience.
- It is recommended that Prom Country's positioning strategies attempt to portray their destination as one that offers an 'easy' escape from the city, the hustle and bustle and the daily routine.
- PCRT needs to endorse the region's originality and differentiate their product / attractions from standard regional experiences offered by competing destinations.
- It is important that the visitor perceives the destination as offering an affordable but nonetheless quality experience.
- The regions' perceived natural beauty and its historical attractions should be promoted to attract the primary target market 'relax with nature' identified in this study.
- The 'city slicker' market are also enticed by the region's natural attractions, however they need to know that they can also access the same comforts they are used to having at home – quality accommodation, good food and wine and the opportunity to socialise
- The region needs to consider the availability of self catering style accommodation and also encourage future tourism operators who are considering investing in the accommodation sector to develop such amenities.
- The region needs to ensure that local Caravan Park and Camping facilities are continuously serviced and maintained and provided with necessary resources to do so.
- Supporting infrastructure such as adequate accommodation facilities, food and beverage outlets, visitor information centres, interpretive centres, maps, walking / hiking trails, wildlife viewing platforms and interpretive guides, scenic lookouts and the basic amenities such as public toilets, rubbish bins etc all need to be allocated adequate financial and human resources to ensure they provide a safe and enjoyable nature based experience for the visitor.
- Pricing is an extremely important component of the marketing mix should the region wish to be successful in attracting this particular demographic
- A high turnover – low profit pricing strategy is recommended for Prom Country, suggesting the region should focus on attracting high numbers as opposed to high yield.

- Promotional campaigns should utilise words and phrases that support the positioning strategy discussed above- for example, 'escape' 'unique' 'natural/nature', and 'relax'.
- Television advertising, preferably that derived through public relations style media, proved to be an excellent promotional vehicle for generating awareness about the region and it is recommended that this method of promotion is continued
- It is recommended that Prom Country continue to engage in cooperative online promotional activities ensuring that the provision of online material is informative, regularly updated and user friendly
- Value for money was of great importance to the visitor, as such, promotional deals offering discounted accommodation and or food and beverage should be employed to attract visitors in during low season.
- The region needs to positively promote WOM activity and utilise the available online social networking sites such as face book and twitter to stimulate discussion about the region.
- Quality evaluation and control measures such as industry accreditation, awards for best practice and visitor feedback need to be in place across the region to ensure sufficient levels of visitor satisfaction and stimulate positive word of mouth.

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1.0 INTRODUCTION

Prom Country Regional Tourism (PCRT) in association with South Gippsland Shire Council has recognised a need for knowledge regarding their current and potential visitor market. In particular PCRT wished to attain a detailed understanding of their visitor's perceptions, motivations, travel behaviour and demographic profile. Information was also sought with regards to the visitor's attitudes towards the various accommodation pricing structures offered throughout the region.

This research report presents the qualitative and quantitative findings of a study that investigated the market profile of Prom Country's current visitor market, that is, those that have previously visited the region. In particular, this report will reveal statistically supported findings that address the following research questions:

1. What types of activities and experiences does Prom Country's current visitor market seek?
2. What is the current market's preferred accommodation type and how much are they willing to pay for accommodation?
3. What motivates tourists to come to Prom Country, South Gippsland?
4. What attractions appeal to Prom Country's current visitor market?
5. What is important to the visitors when choosing their travel destination (e.g. accommodation, accessibility, food and beverage, information centres and safety etc)?
6. Where do the visitors access their information from before and during their visit?
8. What types of leisure activities do Prom Country visitors generally like to engage in?
9. What is the demographic profile of Prom Country's current visitor market?
10. What market segments exist among Prom Country's current visitor market?

Prior to the presentation of the results, the method via which this information was obtained will be discussed. The report will conclude with a number of recommendations for consideration by PCRT and South Gippsland Shire Council.

2.0 METHOD

2.1 Focus Groups

To capture the opinions of Prom Country's current visitor market and inform the quantitative questionnaire, a focus group was conducted. The focus group discussion was held at the Monash Conference centre in Melbourne on March 15, 2010 and members of Prom Country's current visitor market were invited to attend to discuss their thoughts on the region. A copy of the focus group question schedule can be found in Appendix A. A total of nine participants from a variety of backgrounds were selected by the researcher to share their views at the focus group session. Details of the participants are presented in the Table 1 below.

Table 1. Focus Group Participants

Descriptor	Number of Participants
Age	
20-30	1
31-40	0
41-50	4
51-60	2
60+	2
Occupation	
Professional Employed	5
Home Duties	1
Professional Retired	2
Student	1
Family Status	
Dependent Children at Home	3
Empty Nesters	5
Single no children	1

The focus groups session ran for approximately 70 minutes. The recorded discussions were transcribed using a professional transcription agency and the transcripts were analysed and key themes were identified. A summary of the findings are presented in Section 3.1.

2.2 The Survey

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 currently visit Prom Country, South Gippsland. To ensure the current research produced quality data that represented the needs of the region, the items in the survey instrument were guided by the focus group responses and consultation with the Chair of PCRT, and tourism representatives

from South Gippsland Shire Council. A total of 23 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 B for a copy of the questionnaire.

2.3. 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 263 usable¹ 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. 296 usable responses were received via the online survey.

The data from a total of 559 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 3.2.

¹ 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. Further, a number of envelopes were returned with blank surveys (9 in total) but complete prize draw entry forms – these were also discarded along with the prize draw entry form.

3.0 RESULTS

This section presents the results of both the qualitative and quantitative studies.

3.1 Focus Group Analysis

3.1.1 Motivations for taking a holiday / leaving home

Question one asked the respondents to indicate generally what prompts them to take a break and leave home. An understanding of what we call 'push' factors is important when profiling the tourism market as it allows the marketer to match their particular product offering with the needs and wants of the holiday seeking consumer. Many of the responses to this question were based on a need for relaxation and escape with the most common answers including phrases such as; "to get out of the city"; "to experience some peace and quiet" "rest and relaxation" and "escape the everyday grind". To spend time with the family was quite a common response and the need to see and experience something new and unique was also prevalent.

3.1.2. Why did they choose Prom Country?

The natural scenery played a significant role with regards to what 'pulled' the visitor towards the region, in particular the "beautiful beaches" "unspoilt landscape" and Wilson's Promontory National Park. The fact that Prom Country is perceived to be an "easy drive" was also encouraging and according to the participants the region is a great place to relax and spend time with the family. Food and wine was mentioned by one participant while at least three agreed that Prom Country is a good destination to take their interstate visitors.

3.1.3 Where did they access most of their information about Prom Country, South Gippsland?

It is not surprising given the Australian population's ever increasing dependency on the internet for information that this source was the number one source of information. In particular, Google was the most popular search engine. However, it is important to note that alternative media sources tended to initiate the participant's awareness of the region. RACV magazine, the travel sections of the Herald Sun and the The Age and television shows such as Coxy's Big Break and Post cards were mentioned by the group as creating initial interest which they then followed up using the Internet.

3.1.4 What experience were they seeking when they visited the region?

This question was designed to explore the participants' experiential motivations for coming to Prom Country. The responses to this question indirectly represent the tourist's perception of the region in terms of what type of experience the region can offer. The

responses were somewhat supportive of the notion that Prom Country as a tourism destination is perceived as capable of satisfying the holiday specific needs and wants of visitors previously identified in 3.1.1 with over half of the group stating that they sought rest and relaxation, peace and quiet, family time and something unique. Although two participants agreed that they prefer an action packed experience that offers a variety of activities, one of which placed importance keeping the children entertained. Social (spending time with friends) and romantic (spending time with partner) experiences were also sought by a number of participants. All participants were more than satisfied with their experience in Prom Country, suggesting that the region is fulfilling the needs and wants of its visitors.

3.1.5 What activities do visitors associate with South Gippsland?

Again, nature based experiences represented the most common response when the participants were asked to nominate the kinds of activities they associate with Prom Country. The group unanimously agreed that hiking, camping, site seeing, exploring and natural attractions were the types of activities you would expect to experience whilst visiting the region. Adventure and exploring were also mentioned as well as relaxation and going to the beach.

3.1.6 Where did the visitors stay during their visit and were they happy with their accommodation?

Whilst the majority in the group specified that they stayed at the Tidal River Camping ground during their last visit, many did state that on previous visits they had stayed in cabins, motels and holiday houses. It is important to note that one participant would have preferred cabin style accommodation but was left with no choice but to camp due to a lack of availability.

When asked whether they were happy with their accommodation, most respondents stated they were, however, there was general agreement among the group that there is a lack of accommodation options within close proximity to Wilson's Promontory. One participant also commented that the accommodation options in Prom Country are missing the WOW factor.

3.1.7 What style of accommodation do visitors generally seek when planning a holiday?

In response to a request by PCRT for detail regarding the visitor market's accommodation preferences, participants were asked to describe their preferred accommodation type. A common response to this question indicated that accommodation choice was situation specific – that is, the choice is dependent on both the purpose of trip and the destination. To obtain a relevant response the facilitator asked the respondents to consider their

preferred accommodation type when travelling for leisure within Victoria. The answers varied quite significantly and therefore it is difficult to draw conclusions from the discussion. It is anticipated that the questionnaire will provide further clarity regarding the accommodation preferences identified in the focus group discussion as listed below:

- One with comfortable beds
- Four star / self catering
- Self catering units
- Motel style accommodation
- Basics – bed shower and a kitchenette
- Must have the internet
- I think the B&B's here [in Victoria] are overpriced
- Family friendly –self catering
- Something unique and different to the same old four star hotel (eg farm stays, country experience)

When asked how much they generally budget for accommodation whilst holidaying intrastate the most common answer (5 respondents) was between \$150-200 per night, two respondents would budget \$100-150, whilst two indicated they would spend between \$200-250 per night

3.1.8 How did the visitors travel to and around Prom Country?

All respondents travelled by car to and throughout the region. They utilised Melways, Maps, Signage and previous knowledge of the area to navigate their way around. Many commented on how easy and accessible to destination with one participant claiming that it would be difficult to get lost. An important observation was made by an older participant;

“I have a seniors card, and we have access to free bus trips (goes to Foster) but choose other destinations over South Gippsland as once we get there ,there is no way to get around. It's too hard to organise and coordinate a stay without transport... there's a market there”

3.1.9 Were they happy with the level of information available whilst visiting the Destination?

All participants were generally happy with the level of information available whilst there. Visitor Information Centres were the most common information source which was complemented by information they had previously downloaded from the Internet pre trip. The majority of respondents had booked their accommodation prior to leaving home; hence they did not require accommodation specific information but used to Official Visitor Guides and local maps to guide them towards attractions, restaurants etc.

3.1.10 What must a destination have before it will be considered by the current visitor market?

This question was designed to explore what is important to the participants when making their destination choice. The attributes noted as most important by the focus group participants varied quite considerably. Whilst the family friendly theme emerged strongly in response to this question, e.g. something for all the family, something that will entertain the kids whilst the parents relax, so did the need for quality food and wine options. A number of participants agreed that a destination had to be 'easy' before they would consider it and offer something unique. The group was divided in terms of action based activities and those that offer rest and relaxation.

3.1.11 Do the visitors prefer to make their own travel plans or do they prefer a packaged option?

There was a consensus within the group in response to this question with participants generally preferring to make their own travel and accommodation arrangements unless the package offered significant savings and value for money. However, some agreed that they like their accommodation hosts/ providers to organise various components of the trip such as restaurant bookings and recommendations and local tours. The general discussion surrounding this question was based on the need for detailed information about accommodation and dining options with many suggesting that there is never enough detail about such services. There appeared to be substantial reliance on accommodation providers to provide tourist information about the surrounding region.

3.1.12 What are the visitors prepared to pay for the Prom Country's current accommodation offerings?

PCRT recognised a need to gain insight into the price the tourism market would be prepared to pay for various accommodation and package options. The focus group participants were therefore presented with photographic images and written descriptions of two accommodation properties and two hypothetical package options. The price participants were willing to pay for the accommodation options varied considerably among the group with the price for property A varying from \$80 per night to \$150 per night and property B ranging from \$120 per night to \$200 per night. The average price for Property A was \$121 and the average for Property B was \$168. Details of both properties and the corresponding prices can be found in Appendix C.

With regards to the package options, (see Appendix D), participants were prepared to pay between \$200 and \$400 for package one, and between \$100 and \$380 for package 2. The average price the participants were willing to pay for the two night packages were \$268 and \$227 respectively.

3.1.2 Summary

In summary, the focus group discussion revealed a number of significant issues and themes that will not only advise the development of the survey questionnaire but also those responsible for the marketing and development of Prom Country's tourism product. According to those who participated in the focus group, Prom Country is a great place to fulfil the inherent needs that drive their decision to travel. Those needs were recognised as being rest and relaxation, escape from the every day, quality family time and a new and unique experience. Whilst Wilson's Promontory National Park is a major draw card, the participants were also attracted to the region due to its close proximity to the city, the region's beaches and its surrounding food and wine trails. The focus group suggested that visitors rely on the Internet for most of their information about Prom Country prior to their trip, however, often this information search is triggered by various media sources such as Coxy's Big Break, Post Cards and print publications such as The Age, the Herald Sun and RACV travel magazine. Visitor Information Centres also play an important role in terms of the provision of information with most participants using this service as a means of information during their trip and they were satisfied with the amount of information available to them. Not surprisingly, the region is most commonly known for its nature based activities and it was also implied that the region offers a versatile experience with some claiming it a great place for exploration and adventure whilst others perceiving Prom Country as destination that offers rest and relaxation. Whilst the majority of visitors used their own private transport to get around the region, a need was recognised on behalf of the seniors market for more public transport options.

With regards to accommodation preferences, the responses were extremely diverse, however, at this stage of the analysis it appears that self catering facilities are an important pre-requisite. It is expected that the quantitative survey results will provide further clarification regarding this variable. The accommodation options presented to participants indicated a minimum spend of \$80 and a maximum of \$200, with option B attracting the higher yield. Package deals were not a preferred option among the group, with participants claiming they would only purchase a package deal if it offered significant savings and value for money. Accommodation providers and hosts were perceived as being both an important information source and a booking agent for visitors during their stay. Finally, to be considered, a destination must be versatile, have something for all the family and have good food and wine facilities.

Please note that when interpreting the focus group results, one must acknowledge that the sample size is generally not significant enough to present valid and reliable conclusions, especially when attempting to generalise about a large population. This issue reiterates the importance of survey research which allows the researcher to capture the opinions of the broader market. The implications of these findings have therefore been considered in

conjunction with those of the quantitative study which are presented in the following section.

3.2 Quantitative Results

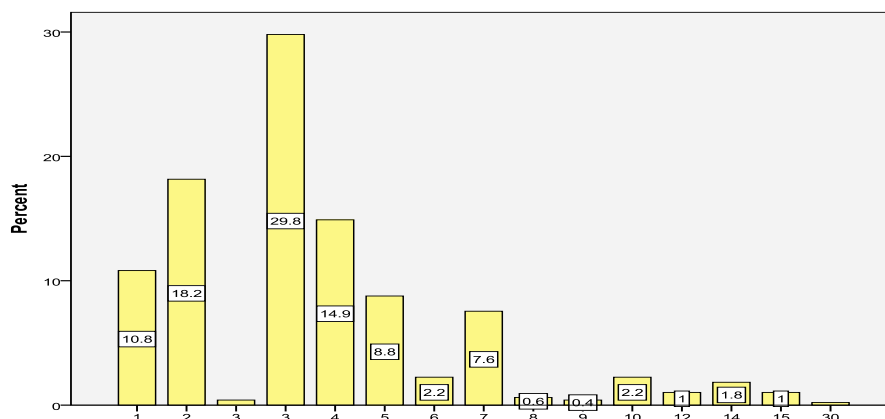
General Trip Behaviour

Understanding visitor behavioural patterns can inform market segmentation analysis and subsequent marketing decisions. Such information can also be used to guide planning and development decisions as it provides an indication of consumer demand for accommodation and food and beverage services. The following results present information pertaining to Prom Country’ current visitor market’s general behaviour whilst visiting the region, such as, how long they stayed, where they stayed, who they travelled with and where the visitors consumed most of their meals.

3.2.1 How long do visitors stay in Prom Country?

As illustrated in Figure 1 below, the most common length of stay was three days and over 50 percent of the respondents stayed in Prom Country for three days or less, signifying that the region predominantly caters for the short break / weekend market. However, the results are also suggestive of the presence of a long stay market with 25 percent of respondents claiming that they stayed in the region for 5 days or more.

Figure 1 Number of Days in Prom Country

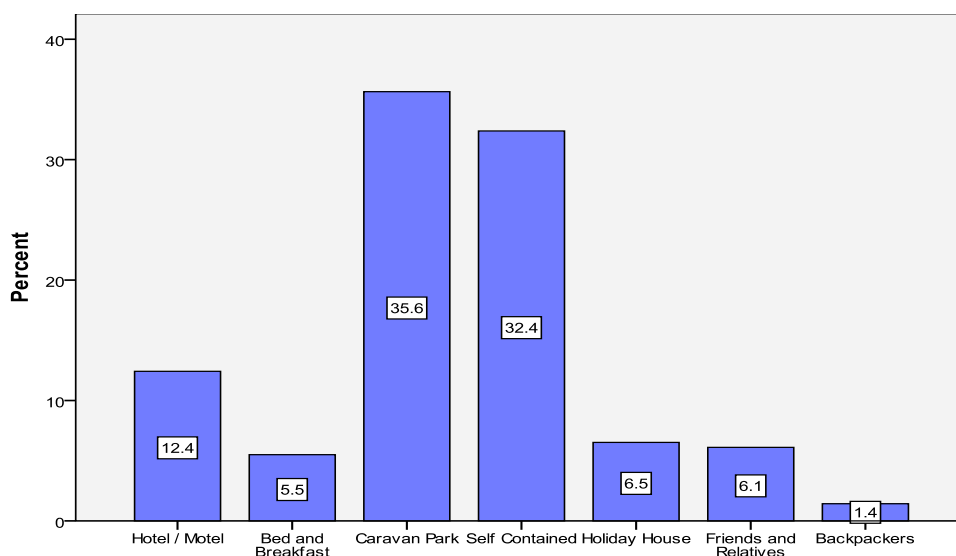


3.2.2 Where did they stay?

It is not surprising, given the camping facilities available in Wilson’s Promontory National Park, that the most common accommodation facility used by the visitors was the caravan park – indicating that the visitors were either camping or caravanning. Self contained accommodation was the second most popular accommodation type which is supportive of the market’s accommodation preferences discussed later in the report. Bed and Breakfast

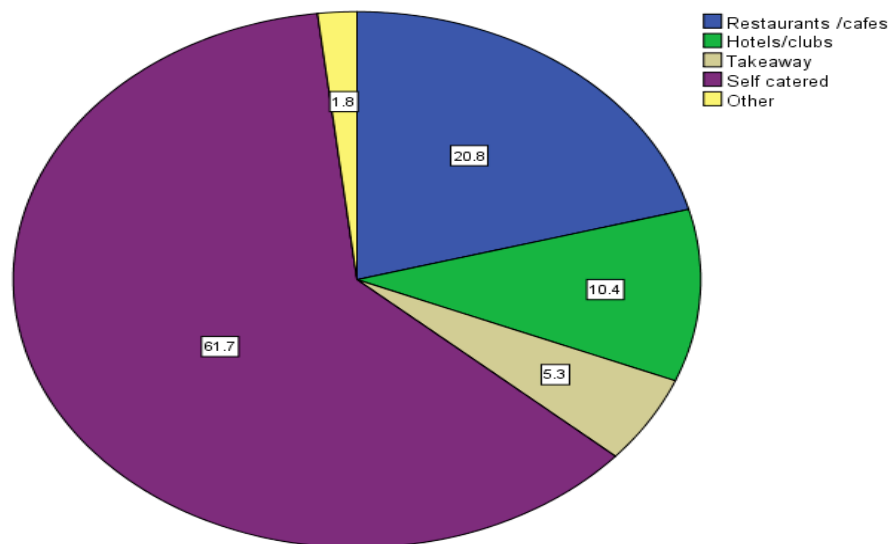
style accommodation and hotels were utilised by less than 20 percent of respondents, suggesting, at this stage, a lack of demand for and or supply of this particular accommodation type. Comparatively, staying with friends and relatives represented a very small percentage of the visitors, indicating that Visiting Friends and Relatives (VFR) is not a primary motivation for visiting the region. Backpacker style accommodation was the least represented in this visitor sample and possible explanations for this result are; the survey did not appeal to or reach this particular market, this particular market segment represents a small proportion of Prom Country visitors or the fact that increasingly, backpackers are choosing to travel within Australia via campervan – hence this particular market may prefer to stay in a caravan park as opposed to a backpacker venue.

Figure 2 Accommodation Choice



3.2.3 Where did the visitors dine?

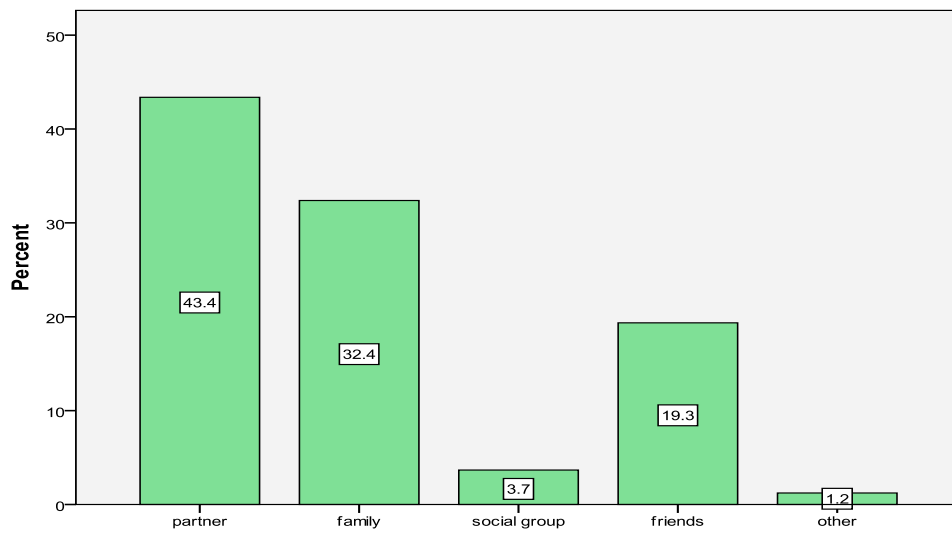
The responses to this question, as illustrated in Figure 3 are somewhat disappointing for local food and beverage providers with the majority of visitors preferring to self cater. While this result is supportive of the camping/ caravanning and self catering accommodation preferences formerly indicated, it does suggest a lack of demand for local food and beverage facilities with only 36 percent of visitors eating at local establishments. Of this 36 percent, restaurants and cafes were the most popular (21 percent) followed by Hotels and Clubs (10 percent). Take away venues have proven to be not so popular among the current visitor market with only 5 percent preferring this option.

Figure 3 Where did the Visitor's Dine?

3.2.4 Who did they travel with?

Travel party information can be used to inform the assessment of accommodation facilities and identify potential gaps that might exist in the current visitor market. In addition, whom the visitor travels may offer some explanation in terms of their motivations for travel. For example, the chart below illustrates that a significant proportion of the visitors travelled to Prom Country with their partners which might suggest that one of the main motives for travel was to spend quality time with their partner. Those that travelled with their family represented close to a third of the visitors. Evidently, based on these results, Prom Country does not stand out as a destination for large social groups (i.e. Lions, Rotary, Probus etc) but almost 20 percent of respondents chose to visit the region with their friends, indicating that Prom Country is a good choice for those seeking a social experience. Questions one may like to ask is, do the accommodation facilities offer a suitable experience for couples and are they positioned as such? Is there adequate family friendly accommodation available? Does the region offer suitable venues and facilities for socialising?

Figure 4 Travel Party

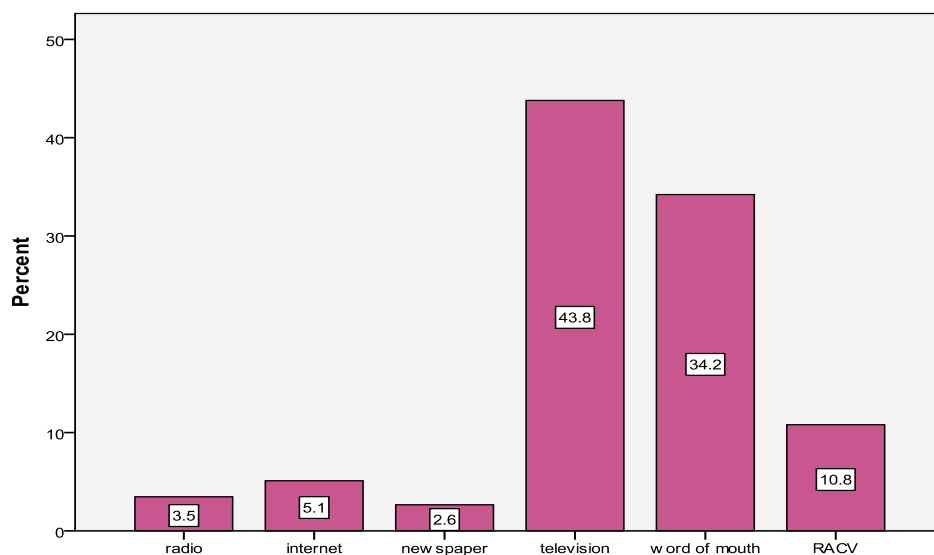


Information Usage

Visitors were asked to respond to two questions regarding their information search behaviour both prior to and during their visit to Prom Country. Information was also sought with regards to how they initially became aware of the destination. The responses to these questions are as follows.

3.2.5 How did the visitors first become aware of Prom Country, South Gippsland?

Figure 5 What Triggered Initial Awareness?

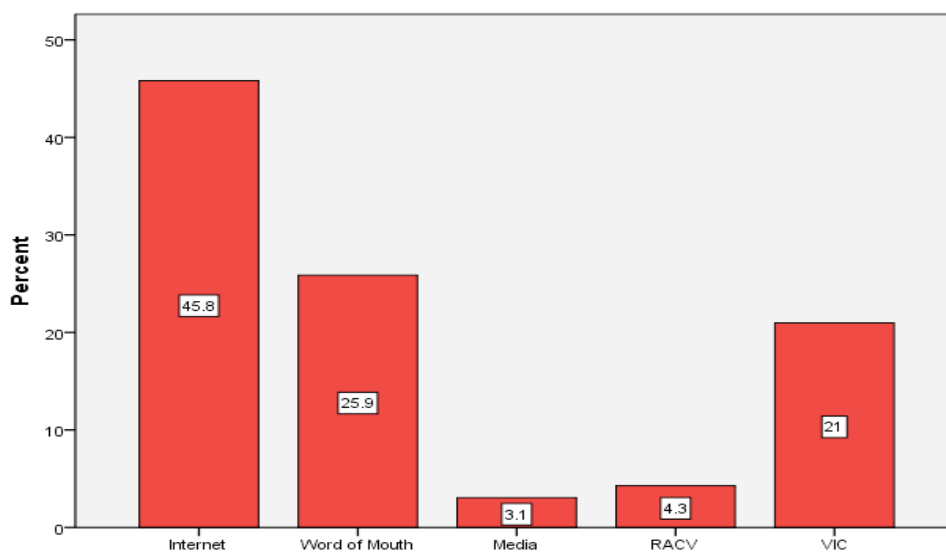


As illustrated in Figure 5, television plays a significant role in generating awareness of Prom Country, South Gippsland. Respondents listed television travel shows such as Coxy’s Big Break, Getaway and Postcards as the specific type of media that generated their interest in the region. Second to television was word of mouth, with over a third of respondents indicating that they first heard of Prom Country via family, friends and colleagues, word of mouth (WOM) is evidently an important promotional tool. RACV accommodation guide performed well as a standalone media vehicle with 10 percent of respondents learning about Prom Country via this publication.

3.2.6 Via which source did they seek information about Prom Country prior to their visit?

Whilst the Internet played a relatively small role in generating initial awareness of the region, it appears that a majority of the visitor market rely on this source for their pre-holiday information search activities. This result is not surprising given the Australian population’s increasing dependency on Internet Technology. It is interesting to note however that over 25% of visitors once again relied on information from family and friends when conducting their information search and this result lends further support to the importance of WOM promotion. Visitor Information Centres were popular with 20 percent of respondents, reiterating the importance of these regional information hubs. On reflection of the previous result regarding awareness, it is clear that while the media is very successful in generating awareness of a destination, it is not a common resource for those actively seeking information about the destination.

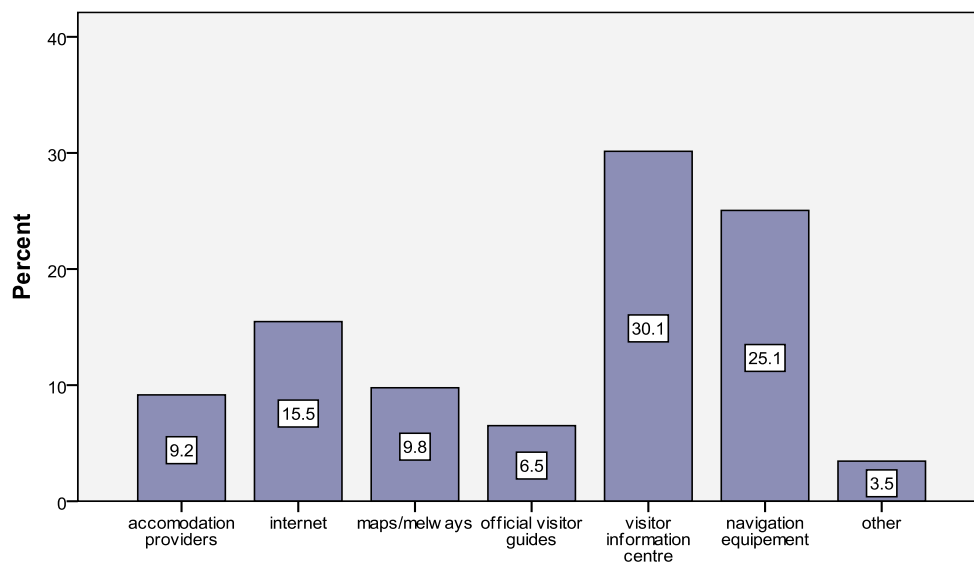
Figure 6 Information Sources Used Prior to Visiting



3.2.7 Via which source did they seek information about Prom Country during their visit?

In 2008, Tourism Victoria conducted a research project within regional Victoria that aimed to investigate the booking behaviour and information sources used by regional tourists (see; www.tourismvic.gov.au) The results illustrated in Figure 7 are consistent with Tourism Victoria’s research which suggested that Visitor Information Centres (VIC) are the most common source of information used by the tourist during their trip. Over 30 percent of visitors sourced information from the VIC whilst visiting Prom Country. Navigation Equipment however, was also used as an information source with over 25 percent of respondents indicating that this device provided most of their information during their stay. The role of accommodation providers in relation to information provision was not as prevalent in the quantitative data compared with that revealed in the focus group discussion, however, given that 10 percent of visitors value the information provided by accommodation hosts. Official Visitor Guides (OVG’s) did not appear to be a commonly used information source among the visitors with only 6.5 percent noting that they used this publication. It is expected that the visitor’s referral to the Internet as a valued information source will increase with the development of both telecommunications devices and infrastructure that will provide better coverage across regional destinations.

Figure 7 Information Used During Trip



Motivations

Respondents were asked to disclose what generally motivates them to take a break / holiday. These intrinsic drivers are referred to in the tourism marketing literature as push

factors. An understanding of why people want to get away can advise product positioning strategies – that is if we know for example that most people decide to take a break to relax and unwind, Prom Country could consider positioning their region as a place that can fulfil this need. Such information can also inform PCRT’s current positioning strategy and make an informed assessment of whether or not their current positioning strategies are conducive to the needs, wants and motivations of the visitors.

3.2.8 What motivates the Prom Country visitor to take a holiday / short break?

Table 2 presents the attributes included in the survey and their corresponding means listed from highest to lowest. Respondents were asked to rank their level of agreement for each listed attribute on a 7 point likert ranking scale that ranged from 1 (strongly disagree) to 7 (strongly agree). The mean scores listed in the table should be interpreted within the confines of a 7 point scale.

According to the results, Prom Country visitors, like many, appear to be motivated to take a holiday by their quest for rest and relaxation. While R&R would undoubtedly be top of mind for many tourist’s when asked to nominate their reasons for taking a break, it is nonetheless important for tourism destinations to be aware of this innate need to ensure their product is positioned as one that can provide for this need. Respondents also rated the need to ‘escape the hustle and bustle of the city’ as highly motivating and this offers a significant point of differentiation for regional tourism destinations such as Prom Country. While getting away with loved ones attracted a moderate level of agreement, the need for socialising with friends was not as influential. However, in the context of the 7 point scale, the respondents tend to agree that all of these attributes contribute in some way to their decision to get away.

Table 2 Motivations for Taking a Holiday

Motivation	Mean
The need for rest and relaxation	6.22
The need to escape the city	5.84
The need to spend quality time with my partner	5.78
The need to experience something new and unique	5.61
The need to spend time with my family	5.48
The need to spend time with my friends	5.10

3.2.9 What motivated the visitor to visit Prom Country?

Whilst the data presented in Table 2 represent the general motivations or reasons for leaving home and taking a holiday / short break, the responses presented below in Table 3, represent the primary reasons the visitor chose Prom Country as their preferred destination.

These destination specific attributes that attracted or 'drew' the tourists towards the region are theoretically referred to as 'Pull Factors.

Table 3 Motivations for Choosing Prom Country

Destination Attribute	Mean
The natural scenery	6.56
A great place to relax	6.31
Interest in natural attractions	6.27
Wilson's Promontory National Park	6.20
Beautiful beaches	6.09
A great family destination	5.98
A great place to take interstate visitors	5.90
The great selection of food	4.78
Plenty of children's activities	4.70
The great selection of wineries	4.51
It's close to home	3.83

Given the region's extensive array of natural attractions, it is not surprising that there was strong agreement towards the natural scenery item, making this the number one drawcard. Prom Country is also perceived to be a great place to relax which is good news for the region considering the visitor's primary motivation for taking a holiday. One would expect the respondents to reveal a strong interest in natural attractions given their rating for natural scenery, however, the fact that Wilson's Promontory National Park was ranked fourth on the list suggests that according to the visitors who participated in this study – 'the Prom' is not the only reason they visit the region. Also worth noting is that many of the respondents agreed that Prom Country was a great place to take interstate visitors – indicating that the local intrastate market are in effect showcasing the region to interstate and overseas visitors. Those attributes listed in the bottom four shaded cells were located around the neutral point of the scale, signifying that these attributes are not major drawcards. The fact that being close to home was not a major pull factor indicates that travel time is not a concern for the visitors.

Because catering to a single motive is unlikely to maximise visitation levels, analysis went beyond examining individual motives to examining whether there were any underlying themes that encapsulated multiple motives. Such themes could then be used as an informed means of inspiration behind creating customised Prom Country tourism packages. Subsequent analysis did in fact reveal that these 11 motives could be summarised by a smaller set of motives. The analysis revealed that there were just 2 common themes that

neatly summarised visitors' reasons for visiting the region - food and family and natural beauty. These themes along with their corresponding items are presented in Table 4.

Table 4 Motivation Themes

Natural Beauty	Food & Family
Beautiful beaches	Great selection of food
Natural scenery	Great selection of wineries
Natural attractions	Great family destination
Wilson's Prom	Children's activities
Great place to relax	Close to home
Great place to take interstate visitors	

Of these two motives, *natural beauty* is significantly more influential, recording a score of 6.2 (on a 7-point scale) as compared to 4.8 for *food & family*. Hence the underlying motive behind a visit to Prom Country appears to be its *natural beauty*, which, according to this market, makes the region a great place to relax and a great destination to showcase to their visitors. Any marketing efforts seeking to capitalise on these motives need not focus on any one specific segment of the marketplace, because further analysis revealed that visitors' motives are unaffected by demographic determinants such as income, age, marital status or number of children.

Perceptions

3.2.10 What kinds of activities do the visitors associate with Prom Country?

This question more or less aligns with that included in Tourism Victoria's Biannual Regional Attitudes, Perceptions and Satisfaction Survey (RAPS). However, the results presented in Table 5 are indicative of the current visitor market's perception of Prom Country as opposed to the whole of Gippsland.

Table 5 Activities Associated with Prom Country

Activity	Mean
Experiencing Nature	6.27
Hiking and Bushwalking	6.24
Sight Seeing	6.23
Relaxation	6.08
Camping	5.84
Surfing and Beach Activities	5.50
Adventure	5.50
Fishing	4.54
Boating	4.16
Golfing	3.06

According to the respondents, Prom Country is a region where one can experience nature, go hiking, bush walking and sightseeing. The region is also perceived as one that can offer relaxation and this is considerably important given the current market's desire for this type of experience. The results suggest that Prom Country is without a doubt perceived by its current market as a Nature Based tourism destination that offers a variety of outdoor activities that allow the tourist to experience the surrounding natural environment. The activities listed on the table also suggest that the region offers a more passive nature based experience with fishing and boating given little consideration.

Holiday Preferences and Preferred Leisure Activities

Insight into the types of experiences the market generally seeks in a holiday can also serve as an important information source when it comes to devising marketing strategies – particularly positioning. One can also use this information for auditing purposes particularly when seeking to identify any product 'gaps' in terms of what the destination has on offer and what the visitor wants. In the questionnaire respondents were asked to reveal the types of experiences they seek in a holiday and the attributes a potential holiday destination must have before it will be considered.

3.2.11 What experiences do the visitors seek when choosing a holiday destination?

Because this first phase of the research focuses on Prom Country's current visitor market, the responses and their associated mean ranking presented in Table 6 are also illustrative of the visitor's perception of the kind of experience the region is able to offer. For example, the attributes listed indicate what experience they seek when choosing a holiday, the fact that they have already chosen Prom Country is an indication that they believe Prom Country is capable of offering this experience. The themes of escape, relaxation and nature are again prominent in this response and visitors also seek something new and unique. A variety of attractions and experiences could also be interpreted as being moderately important. The fact that action and adventure and festivals and events have been rated in the bottom four by the current market supports the previous notion of Prom Country offering a more passive / peaceful experience. The current visitors do not appear to be that enthused about romantic experiences.

Table 6 Experiences Sought in a Holiday

Experience Sought	Mean
An escape from the everyday routine	6.29
Rest and relaxation	6.17
Nature based experiences	6.00
Something unique	5.86
Variety	5.74
Socialise with friends	5.55
Quality family time	5.47
Quality touring routes	5.25
Sun, sand and surf	4.95
Action and adventure	4.86
Romance	4.75
Festivals and events	4.73

3.2.12 What **must** a destination be / have before it will be considered?

Table 7 Most Important Attributes

Attribute	Mean
Value for Money	6.32
Relaxing	6.24
Easy / hassle free	6.13
Peaceful	6.10
Natural Attractions	5.97
Variety of Accommodation	5.94
Variety of Attractions	5.85
Unique Attractions	5.77
Good Beaches	5.75
Restaurants and Cafes	5.51
Family friendly	5.06
Accessible (wheel chair access)	4.24
Children's activities	4.22
Good wineries	3.90
Dog Friendly	3.31

Respondents were asked to rate the attributes listed in Table 7 according to their importance when considering their destination choice. The results suggest that in order to be considered by current visitors a destination must offer value for money, be relaxing, peaceful and 'easy' or hassle free. Although the relaxation theme has again come through

strongly in response to this question – value for money appears to be of high importance to the visitor market. It is also important for a destination to offer a variety of accommodation options and attractions and the attractions need to be unique. The fact that restaurants and cafes were positioned lower down the list is supportive of the previous revelation regarding the visitor’s preferences for self catering. The results also suggest that family friendly facilities are comparably not that important to the current visitor market and the demographic profile data presented later in the report may offer further explanation for this. Of little importance to the current visitor market are accessibility, children’s activities and wineries and the results reflect that a destination does not have to cater for dogs to be considered.

3.2.13 What do Prom Country Visitors like to do in their spare time?

By having a general idea of the types of activities Prom Country’s current visitor market enjoy, PCRT can not only promote the availability of these activities should they exist, but also, make assumptions regarding the likelihood that likeminded people who seek similar experiences will visit the region. Further, such information can be used by researchers to identify similarities among respondents and identify segmentation opportunities based on peoples travel behaviour, motivations, demographics and preferences as presented in section 3.2.14

Table 8 Preferred Leisure Activities

Activity	Mean
Wildlife viewing	5.71
Hiking and Bushwalking	5.53
Reading	5.47
Visiting historical sites and museums	5.40
Dining out	5.34
Socialising	5.05
Swimming	4.81
Visiting wineries and food trails	4.61
Shopping	4.22
Gardening	4.10
Cycling	3.94
Sunbathing	3.78
Fishing	3.43
Four Wheel Driving	3.22
Sailing	2.90
Golf	2.42
Horseracing	2.31
Hunting	1.81

The fact that the highest mean score for all of the attributes listed above was less than six, indicates that none of the respondents were extremely enthusiastic about the activities listed in this battery. However, the fact that wildlife viewing, hiking and bushwalking were rated as the top two attributes is consistent with previous findings that demonstrate the visitor's preference for nature based experiences. Those activities highlighted in blue are those that are not enjoyed by a majority of respondents. Those highlighted in grey are neither liked nor disliked – suggesting the visitors are not enthused by such activities. It is interesting to note that despite the respondents preference for self catering accommodation, dining out is rated comparably high in terms of the activities they enjoy. This suggests that although self catering is preferred, visitors may be easily persuaded to dine at the region's restaurants and cafes.

3.2.14 Identifiable Market Segments

Via a computer software method called factor analysis, the motives and interests identified in questions 8 to 13 were reduced to six smaller groups of related items in a bid to identify motive and interest driven market segments. These are presented in Table 9.

Table 9 Motivation and Interest Categories

Natural Beauty	Food & Family	Nature & history	Sport	Urban lifestyle	Active outdoors
Beautiful beaches	Great selection of food	Hiking / bushwalking	Swimming	Meeting people	4-wheel driving
Natural scenery	Great selection of wineries	Wildlife viewing	Cycling	Shopping	Fishing
Natural attractions	Great family destination	Visiting historical sites	Golfing	Dining out	Sailing
Wilsons Prom	Children's activities		Horse racing	Wineries/Gourmet trail	Sun, sand and surf
Great place to relax	Close to home			Reading	Hunting
Great place to take interstate visitors					Gardening

Via a statistical analysis technique known as Cluster Analysis, we were then able to reveal three quite distinct visitor groups amongst the respondents that have been segmented based on their motivations, interests. These are presented in Table 10 and further discussed below.

Table 10 Prom Country Market Segments

Motivation (M) & Interest (I)	Segment 1	Segment 2	Segment 4
Natural beauty (M)	6.4	5.4	6.5
Food & family (M)	4.5	4.3	5.5
Urban lifestyle (I)	4.3	5.0	6.0
Active outdoors (I)	2.3	2.8	4.4
Sport (I)	3.9	4.3	5.9
Nature & history (I)	6.4	5.4	6.5
% of sample	62%	19%	19%

Segment #1 – Relax with Nature

This segment earns its name from two factors. Firstly, it scores high on the natural beauty motivation and the respondents belonging to this segment presented a keen interest in nature and history. Secondly, this group comprising 62 percent of the respondents noted a disinterest in sport and active outdoors activities signifying they would prefer a more relaxing experience. They are not so enticed by the destination's gourmet offerings and family facilities are not considered essential. Shopping facilities and the opportunity to socialise have moderate to low appeal when considering their preferred destination.

Segment #2 – City slickers

This group earns its name from the fact that while they visit the country in search of nature, history and beauty; they bring with them a raft of needs shaped by their urban lifestyle (e.g. shopping, good food and wine, the need to be around others etc). This is reflected in their view towards destination 'must haves'. On the one hand they seek out the sort of natural attractions (e.g. bush, beach etc) that are so different to their usual urban lifestyles. However such experiences must not come at the expense of creature comforts (e.g. good food, comfortable accommodation, good roads and an overall easy holiday experience). This is the equal smallest group, making up just 19 percent of the overall Prom Country market. The ideal marketing campaign for this group is one that emphasises that spending time in nature doesn't have to come at the expense of comfort and convenience.

Segment #3 – The works

Whereas groups 1 and 2 are selective in the things that interest and motivate them, and consequently the holiday destinations they seek out, this group demands the very best of everything. The respondents belonging to this assigned the greatest degree of importance to each and every attribute used to describe the ideal holiday destination (see Tables 6 & 7). For this reason, members of this group seek *the works*. Given their demanding nature, it may be

somewhat fortuitous that it shares the accolade with group #2 of being the equal smallest group, making up just 19 percent of the overall Prom Country market.

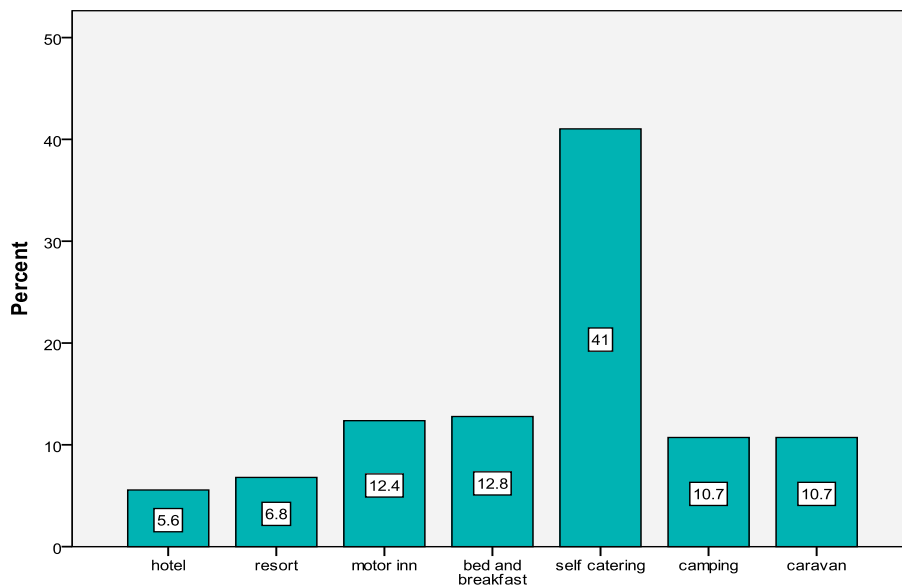
Accommodation Preferences and Expenditure

Specific information pertaining to the visitor’s accommodation preferences was requested by PCRT to provide an assessment of the pricing structure of current accommodation on offer and an indication of demand for these facilities. The questionnaire therefore requested that respondents reveal their preferred accommodation type, their average expenditure on accommodation and how much they would be prepared to pay for selected accommodation options currently available in the region. The results are as follows:

3.2.15 What is the visitors preferred accommodation type?

Given the previous results, one would expect to see the outcome exhibited in Figure 8 that places Self Catering style accommodation as the visitors most preferred option. However, serviced accommodation combined (hotels, resorts, motor inns and bed and breakfasts) still constitute a significant proportion of preferred options (38%) which suggests there is still a considerable demand for this style of accommodation. Camping and caravanning together comprised over one fifth of respondents, which one assumes are those who tend to utilise the Tidal River facility.

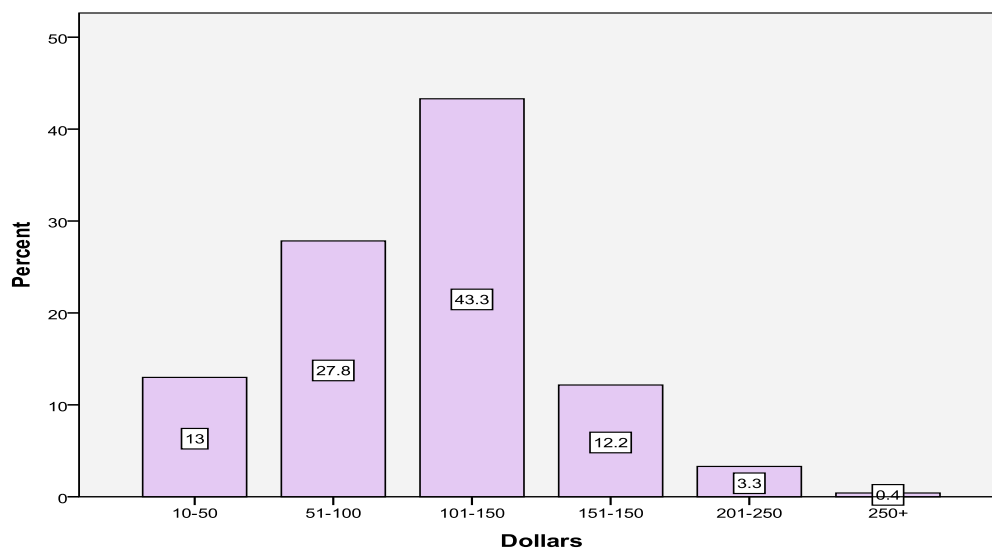
Figure 8 Preferred Accommodation



3.2.16 How much do they spend on accommodation when travelling Intrastate?

To avoid the intervening effect of context (that is respondents not being able to relate to this question as the answer depends on where and why they are travelling)respondents were asked to nominate how much they would be prepared to spend per night on accommodation when travelling within Victoria. As revealed in Figure 9 above, close to half of the respondents would be prepared to spend between \$101 and \$150. The pattern revealed in the chart also indicates that the majority of visitors would prefer to spend less than \$150 (84%). This, coupled with the importance placed on value for money indicates that the Prom Country visitor is somewhat price sensitive and this should be taken into account when devising pricing strategies.

Figure 9 Accommodation Expenditure



3.2.17 How much would they pay for accommodation currently offered in Prom Country?

Respondents were asked to review one of two examples of an accommodation facility currently operating in the region (see appendix C) and reveal how much they would be prepared to pay per night to stay in the facility.

Property A

Respondents who were asked to evaluate Property A revealed an average price of \$107 per night. The most common amount respondents were prepared to spend was \$100 while the minimum was \$25 (2%) per night and the maximum \$350 (4%).

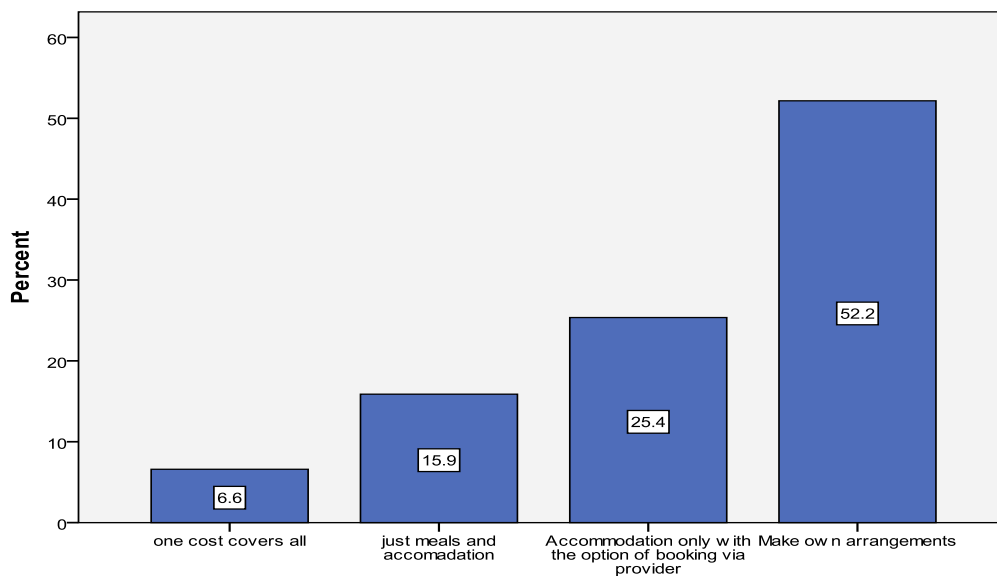
Property B

Property B attracted a higher yield with an average price per night of \$145 while the majority of respondents were prepared to pay \$150. The minimum for property B was \$50 (only 2% of respondents) and the maximum amount revealed was \$400 per night (2 % of respondents).

3.2.18 Packages versus Own Booking Arrangements

When asked to reveal their preference for holiday packages as opposed to making their own arrangements, over half of the respondents claimed they would prefer the latter. However, over a quarter of respondents also indicated that they would like the option of booking activities whilst at the destination via their accommodation provider. This was a theme that emerged in the focus group discussion and these subsequent quantitative results offer support for the notion that the accommodation provider plays an integral role in the provision of tourist information and the promotion of local facilities and attractions.

Figure 10 Package Preferences



Demographic Profile

3.2.19 Who are Prom Country’s current visitors?

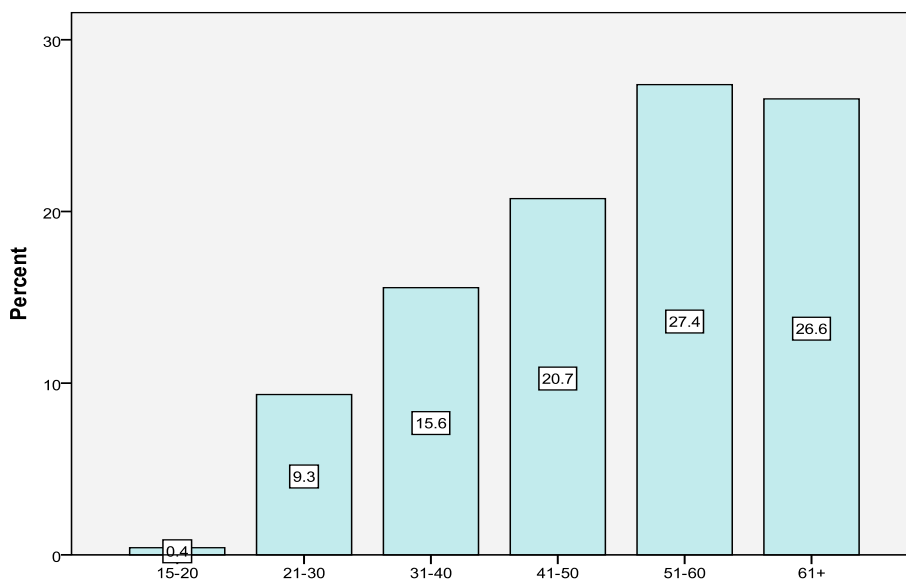
Demographic data were collected to provide a detailed description of the sample and more importantly identify potential market segments to advise the region’s target marketing efforts. Respondents were asked to identify the age group to which they belong, their family

status, place of origin and combined household income bracket. The results are presented below.

Age Groups

Figure 11 illustrates that the majority of age segments were fairly represented among the visitors who took part in the study, despite there being a slight skew towards those aged over 40. This could potentially explain the lack of enthusiasm for sporting and action and adventure based activities indicated in section 3.2.13 and also the non importance of children’s activities indicated in 3.2.11 and 3.2.12. Those aged 21-40 represented over 25 % of the visitors as did the over 61 age segment. The age spread among the current visitor market also provides further explanation for the motivations and interests the define the ‘relax with nature’ market segment.

Figure 11 Age Groups



Family Status

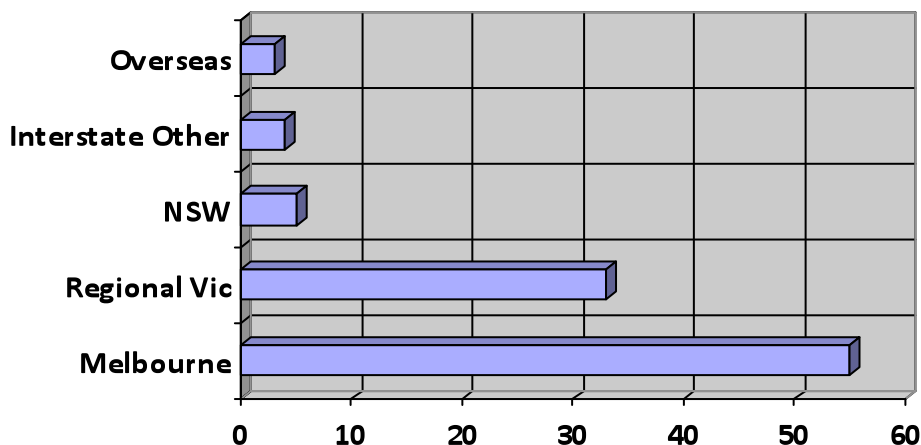
The respondents were requested to provide information regarding their marital status and the number of dependent children they have living at home. Such information provides for a greater understanding and in some cases explanation of the choices made by the respondents when answering the questionnaire.

While over 81% of the respondents were either married or living together, only 35% of the respondents had 1 or more dependent children. This result potentially explains the low to moderate appeal towards family friendly / children’s facilities and the fact that a significant majority of respondents were travelling with their partner.

Place of Origin

The respondent’s place of origin was defined by their postcode. The postcode data was summated and categorised into five groups, Melbourne, Country Victoria, NSW, Overseas and Other (South Australia, Queensland, Western Australia and Tasmania). As illustrated in the chart below, Melbourne was the most commonly represented region with 55 percent of the respondents residing in the city. Visitors from Regional Victoria were reasonably represented producing 33 percent of responses, while the interstate market’s response was comparatively low with NSW being the most responsive group providing five percent of responses. Opinions of those residing in Western Australia, South Australia and Queensland were poorly represented, four percent combined and international visitors accounted for 3 percent of respondents. These findings are however in line with the Gippsland’s current intrastate market focus with an accumulative 88 percent of responses coming from Victorian residents.

Figure 12 Respondents’ Place of Origin

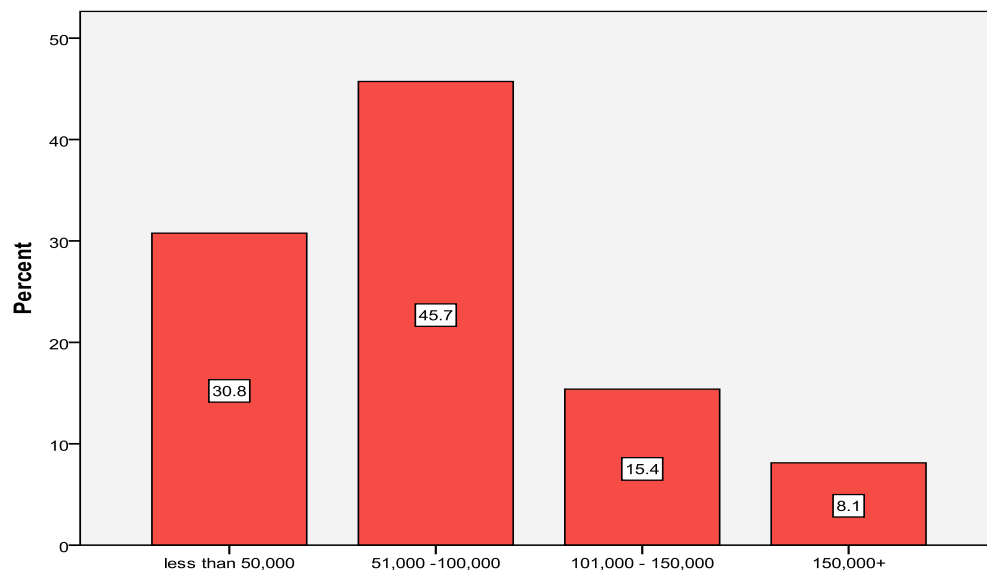


Household Income

Respondents were asked to select an income range that was most representative of their annual combined household income. As demonstrated in Figure 13, the most common (46%) household income bracket was \$51,000 to \$100, 000, followed by ‘less than \$50,000’ (31%). This finding suggests that the current Prom Country visitor market is potentially dominated by low to middle income earners. This result may explain the low range accommodation estimates cited in sections 3.2.16 and 3.2.17 and the essential ‘value for money’ attribute specified in section 3.1.12. Prom Country need to acknowledge however

that close to 25 percent of their current visitor market belong to the middle to high income bracket, hence the region needs to ensure there is sufficient 'high end' facilities to cater for this market segment.

Figure 13 Combined Household Income



3.2.20 Summary of Quantitative Results

In summary, this section has presented statistically supported results that reveal the motivations, perceptions, preferences and profiles of Prom Country's current visitor market. The results have also revealed three psychographically defined market segments, two of which prove to be viable target markets for the region. Key findings pertaining to Prom Country's current market include:

- Visitors tend to stay an average of 3 days in Prom Country
- The most common accommodation facility used by visitors was the Caravan Park, followed by self contained accommodation
- The majority of visitors prefer to self cater when it comes to meals but they are open to dining out.
- A significant proportion of the visitors travelled to Prom Country with their partners
- Television plays a significant role in generating awareness of Prom Country, South Gippsland. Second to television is word of mouth,
- The majority of the visitors access their pre trip information via the Internet.

- Whilst visitors were visiting the region, the Visitor Information Centre was the most commonly used information source
- Prom Country visitors are motivated to take a holiday by the need for rest and relaxation, the need to escape the city and to spend quality time with their partner.
- Visitors are attracted to Prom Country by the natural scenery, their view that it is a great place to relax and their interest in natural attractions.
- Experiencing nature, hiking and bushwalking and sightseeing are the top three activities visitors associate with Prom Country.
- When choosing a destination, Prom Country visitors will seek a place that offers an escape from the daily routine, rest and relaxation and nature based experiences.
- A destination must offer value for money, be relaxing and easy to access to be considered.
- The visitor's top three preferred activities are wildlife viewing, hiking and bushwalking and reading.
- Self catering accommodation represented the visitor's most preferred accommodation option.
- The majority of visitors would spend no more than \$150 per night on accommodation.
- Visitors prefer to make their own travel arrangements, as opposed to purchasing a package.
- The demographic profiling data suggest that the "typical Prom Country Tourist" is aged over 40 years, is married or in a relationship, has no independent children, lives in Victoria and is of low to middle income status.
- Three segments were identified in the study based on the visitors' motivations for visiting Prom Country, their preferred leisure activities, sought after holiday experiences and the importance they place on various destination attributes. It was recommended that two of the three segments be pursued - 'Relax with Nature' and 'City Slickers'.

4.0 RECOMMENDATIONS

Based on the qualitative and quantitative analysis presented in Section 3, the following recommendations have been put forward to inform the tourism development and promotion of Prom Country, South Gippsland.

4.1 Positioning

As a result of this research, PCRT and SGSC are now aware of how Prom Country is perceived in the minds of their current visitors market. The results revealed that Prom Country is positioned as a destination that offers nature based experiences and the opportunity to rest and relax. It is currently renowned for its natural attractions, hiking and bushwalking trails and scenery. It is recommended that the region continue to promote these attributes or 'pull factors' particularly the rest and relaxation component as this represents the visitors' number one motivation for taking a holiday. The region should not be positioned as one that offers an 'action packed' adventure type experience.

The theme of 'escape' emerged a number of times in both the focus groups and the quantitative survey, it is therefore recommended that Prom Country's positioning strategies integrate this theme, portraying their destination as one that offers an 'easy' escape from the city, the hustle and bustle and the daily routine. To capture the markets' quest for something different and unique, PCRT should also endorse the region's originality and differentiate their product / attractions from standard regional experiences offered by competing destinations.

Value for money was identified as the most important destination attribute by the visitor market, hence, it is important that the visitor perceives the destination as offering an affordable but nonetheless quality experience. Advertising campaigns need to communicate this in a subtle manner so not to dispel the higher yielding visitor or those who strongly associate price with quality.

It is not recommended that Prom Country invest in marketing campaigns driven by food and wine as this is clearly not the region's specialty or point of differentiation. The regions' perceived natural beauty and its historical attractions should be promoted to attract the primary target market 'relax with nature' identified in this study. The 'city slicker' market are also enticed by the region's natural attractions, however they need to know that they can also access the same comforts they are used to having at home – quality accommodation, good food and wine and the opportunity to socialise. It is therefore recommended, should Prom Country intend to target this market that the focus is placed on both the natural attractions and the facilities that can offer the comforts of home (high end accommodation, restaurants, hotels etc).

4.2 Product Development

When it comes to product, there are three main categories to consider, namely, accommodation, supporting infrastructure for natural attractions and accessibility. The research suggests that Prom Country visitors hold a strong preference for self catering accommodation. The region therefore needs to consider the availability of such accommodation and also encourage future tourism operators who are considering investing in the accommodation sector to develop such amenities. In addition, the region needs to ensure there are adequate shopping facilities available for visitors so they are able to purchase their supplies locally as opposed to bringing their own supplies from outside the region. Despite the overwhelming support for Self contained accommodation, there was still notable demand for the serviced style of accommodation such as bed and breakfasts, hotel motels and resorts and it is assumed that this accommodation would be more likely to appeal to the 'city slicker' market segment as opposed to those who are motivated by nature alone. Campers and Caravaners also represent a significant proportion of the Prom Country visitor market, therefore the region needs to ensure that local Caravan Park and Camping facilities are continuously serviced and maintained and provided with necessary resources to do so.

Prom Country's natural attractions are the region's number one pull factor and therefore need to be maintained and supported with sufficient resources that allow for sustainable access and usage. Supporting infrastructure such as adequate accommodation facilities, food and beverage outlets, visitor information centres, interpretive centres, maps, walking / hiking trails, wildlife viewing platforms and interpretive guides, scenic lookouts and the basic amenities such as public toilets, rubbish bins etc all need to be allocated adequate financial and human resources to ensure they provide a safe and enjoyable nature based experience for the visitor.

The fact that a number of respondents stated that a destination must be 'easy and hassle free' reaffirms the importance of adequate signage and roads, particularly those heavily used by tourists. Information points and attraction entry points should also be made clearly visible to visitors and offer adequate parking facilities.

4.3 Pricing

It is important to recognise that according to this research, the Prom Country visitor market is predominantly made up of low to middle income earners – defined in this study as people with a combined household income of between \$50,000 and \$100,000. Therefore, pricing is an extremely important component of the marketing mix should the region wish to be successful in attracting this particular demographic. When it comes to accommodation, while it might be assumed that those who classify themselves at the lower end of the scale tend to prefer camping, the average price visitors were prepared to pay across the entire

sample was approximately \$125 per night. Accommodation providers need to evaluate their pricing structures in light of this information and ensure their pricing strategies not only align with what the market are prepared to pay but are also perceived as offering value for money.

As formerly mentioned there is high yield potential among a proportion of the current visitors, and it is therefore recommended that those providers who offer a superior accommodation product employ a targeted marketing strategy to attract those belonging to this segment – as opposed to a more standardised mass market approach.

A high turnover – low profit pricing strategy is recommended for Prom Country, suggesting the region should focus on attracting high numbers as opposed to high yield. Prom Country is somewhat advantaged in this regard due to the comparatively low prices the tourist has to pay to experience natural attractions, which in turn ‘frees up’ spare income to spend on food and beverage, souvenirs and other items / services offered within the region. Operators need to acknowledge this and engage in intraregional cooperative marketing activities to ensure the visitors are made aware of what’s available.

4.4 Promotion

The findings of this research have presented a number of practical implications with regard to the promotion of Prom Country. These are as follows.

Promotional campaigns should utilise words and phrases that support the positioning strategy discussed above- for example, ‘escape’ ‘unique’ ‘natural/ nature’, and ‘relax’.

Pictorial images included in mass advertising campaigns should incorporate images of couples to appeal to ‘empty nesters’ and couples seeking quality time together. Images of social scenes should also be incorporated in campaigns designed to target ‘city slickers’. Obviously, the region’s natural attractions should provide the backdrop for all pictorial campaigns.

Television advertising, preferably that derived through public relations style media, proved to be an excellent promotional vehicle for generating awareness about the region and it is recommended that this method of promotion is continued utilising televised travel shows such as Coxy’s Break, Post Cards and Getaway.

Print advertising is a method that should be employed to support a more targeted approach to promoting the destination. For example, operators who offer luxury style accommodation that is suited to the higher end market should promote their facility using print media that is likely to reach this demographic.

The Internet was revealed as the most commonly used information source during the trip planning process, it is therefore recommended that Prom Country continue to engage in cooperative online promotional activities ensuring the provision of online material is informative, regularly updated and user friendly. Remembering that the visitor is all for an 'easy / hassle free' experience, the region's visitor website should offer a reliable online booking service.

Value for money was of great importance to the visitor, as such, promotional deals offering discounted accommodation and or food and beverage should be employed to attract visitors in during low season. The promoter should not focus so much on the 'price cut' aspect of the deal but more so the 'value'.

The intrastate Victorian resident appears to dominate Prom Country's visitor market and it is therefore advised that the region continue to capture their share of the Victorian short break market. However, interstate tourists that share similar psychographic characteristics to those in the current market should certainly be considered – particularly given the little importance assigned to the 'close to home' attribute in section 3.2.9.

Finally, word of mouth appears to a very receptive form of promotion among the current visitor market with 34 percent of visitors initially hearing of Prom Country via a friend, relative or colleague and 25 percent of visitors seeking further information from their peers whilst planning their trip. It is commonly known that social networking sites such as face book and twitter are extremely valuable and cost effective means of encouraging word of mouth (WOM) promotion and consequently it is recommended that PCRT engage in such promotional activity should they not already be doing so. However, one must acknowledge that WOM can disperse both negative and positive messages and it is therefore essential that the product and service quality offered by Prom Country either meets or exceeds visitor expectations. Quality evaluation and control measures such as industry accreditation, awards for best practice and visitor feedback need to be in place across the region to ensure sufficient levels of visitor satisfaction and stimulate positive word of mouth.

End of Report

Appendix A

Focus Group Question Schedule – Prom Country Tourism Market Profile Research

Location: Monash University Conference Centre

Facilitator: Dr Gabby Walters

Date: Monday, March 15

Time: 6pm

Order of Events

1. Thank participants for their time, facilitator introduce themselves and explain the purpose of the research / focus group. Explain that the interview will be recorded and the nature of the questions that will be asked.
2. Participants are given the opportunity to ask any questions about the interview
3. Participants are then asked to complete the short written demographic questionnaire if they haven't already done so.
4. Participants are asked to identify themselves and reveal the following information:
 - i. Their first name
 - ii. Where they are from
 - iii. Their past experience with Prom Country – time since last visit etc.
5. Questions commence:

Questions

Firstly, I would like you to tell me about your last visit to South Gippsland / Prom Country. The following three questions will ask you to reveal your reasons for visiting the region and the nature of your trip.

1. What motivated you to take a trip/ leave home initially?

2. Why did you choose to visit Prom Country / South Gippsland?

- How did you find out about Gippsland?

- How did you find out about South Gippsland?

3. Where did you access most of your information about the area?

4. What experience were you seeking when you visited the region?

5. Were you satisfied with your overall experience?

-Why? Why Not?

- What aspects in your view need improvement?

6. What activities do you associate with South Gippsland?

- When you think of visiting South Gippsland what do you envisage doing?

These next questions refer to your accommodation usage whilst visiting the region and your accommodation preferences generally.

7. Where did you stay?

-Accommodation type

- Were you happy with the choice of accommodation available?

-Were you happy with the value for money offered by your chosen accommodation?

-What other styles of accommodation would you like to see offered within the region?

8. What style of accommodation do you generally seek when planning a holiday?

- What level of accommodation to you seek? (Basic 2 - 5*)*

- What would be your average budget for accommodation per night?

Accessibility and information sources

9. How did you get to and around the area whilst there?

- *Where you able to access the attractions you wanted to see?*
- *Did you find it easy to get around?*

10. Where / how did you access information about the region whilst there?

- Visitor centres, Navigating Equipment (Tom Toms, Nav Man etc), Accommodation providers
- *Were you able to access the information you needed whilst visiting?*

Questions 10 -11

The following questions will request that you speak of your holiday preferences generally, so moving away from the Prom for the moment:

Q11. When planning a holiday, or a short break, what attributes or features must a holiday destination have before you will consider it?

Participants may ask for clarification or more information – examples such as accommodation facilities, Restaurants, type of attractions will be offered to get the conversation on track.

Q12. What experiences do you generally seek in a holiday?

Examples: Rest and relaxation, health and wellness, adventure, excitement, social experiences, romantic, family oriented etc.

Q13. When booking a holiday, do you prefer the experience to be packaged or do you prefer to make your own travel plans either prior or as you travel?

-Dinner reservations, food and wine packages, attraction passes, tours etc.

6. End of Interview, wrap up session, participants are thanked once again for their time and payment or details of payment is arranged.

Demographic Questionnaire

1. Please tell us a little about you by answering the following short questionnaire:
 2. What is your occupation? _____
 3. In what year were you born? _____
 4. How many children do you have living at home with you? _____
 5. How many times have you visited Prom Country? _____
 6. Who did you travel with? _____
 7. How many were in your travel party? _____
 8. How did you travel to Prom Country? _____
 9. How long did you stay on your last visit? _____
 10. Which media source/s do you acquire your holiday information from? _____
-

Please provide your full name and mailing address for payment.

Name _____

Street Address _____

Suburb _____ Post Code _____

You will be forwarded a cheque for the value of \$70 from Prom Country Tourism for your participation in tonight's session. Please allow up to ten days for payment to arrive.

Thank you very much for your contribution to our study, I hope that you have enjoyed the experience!

Appendix B

Prom Country Tourism Questionnaire

SECTION A

Firstly, please tell us some general information about your last trip to South Gippsland, otherwise known as Prom Country

1. How many days did you spend visiting Prom Country _____ Days
2. What type of accommodation, if any, did you use whilst visiting Prom Country?
 - a. Hotel/Motel
 - b. Bed and Breakfast
 - c. Caravan Park / Camping Ground
 - d. Self Contained Apartments/Cabins
 - e. Holiday House
 - f. Friends / relatives home
 - g. Backpackers
3. Where did you have most of your meals whilst visiting Prom Country? Please select one option.
 - a. Local restaurants/cafes
 - b. Hotels / Clubs
 - c. Takeaway outlets/Fast food
 - d. We self catered
 - e. Other _____
4. 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.
 - a. The Internet
 - b. Friends, Family or Associates
 - c. The Media (television, Newspaper, magazines)
 - d. RACV Magazine
 - e. Visitor Information Centre
5. Via which of the following information sources did you access most of your information about Prom Country **during** your trip? Please select one option.
 - a. Accommodation Providers
 - b. The internet
 - c. Maps

- d. Melways
- e. Official Visitor Guides
- f. Visitor Information Centre
- g. Computerised Navigation Equipment (Nav man / TomTom etc)
- h. Other _____

6. Via which of the following information sources did you first learn / become aware of Prom Country, Gippsland?

- a. Newspaper, Magazine please specify which _____
- b. Television travel show, Please specify program _____
- c. Radio
- d. Friends, Family or Associates
- e. RACV Accommodation Guide
- f. Internet

7. Which of the following best represents those you were travelling with? Please select one option.

- a. Your partner
- b. Family
- c. A social group (e.g Lions Club, Rotary, Probus, Caravanning Club)
- d. Friends
- e. Other _____

SECTION B

The following two questions ask you to think about Prom Country. In particular we would like you to tell us the types of activities you associate with Prom Country and why you chose to visit the region as opposed to another destination. Using the key below, please indicate your level of agreement with the following options.

Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
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8. I chose to visit Prom Country because:							
It's close to home	1	2	3	4	5	6	7
Prom Country has beautiful beaches	1	2	3	4	5	6	7
I enjoy the natural scenery Prom Country has to offer	1	2	3	4	5	6	7

Prom Country is a great place to relax	1	2	3	4	5	6	7
I have an interest in natural attractions	1	2	3	4	5	6	7
The region has a great selection of food	1	2	3	4	5	6	7
The region has a great selection of wineries	1	2	3	4	5	6	7
There are plenty of activities for children	1	2	3	4	5	6	7
Prom Country is a great place to take interstate visitors	1	2	3	4	5	6	7
Prom Country is a great family holiday destination	1	2	3	4	5	6	7
I wanted to visit Wilsons Promontory National Park	1	2	3	4	5	6	7
9. The activities that comes to mind when I think of Prom Country are:							
Hiking/Bushwalking	1	2	3	4	5	6	7
Camping	1	2	3	4	5	6	7
Adventure	1	2	3	4	5	6	7
Relaxation	1	2	3	4	5	6	7
Sight Seeing	1	2	3	4	5	6	7
Fishing	1	2	3	4	5	6	7
Experiencing Nature	1	2	3	4	5	6	7
Golfing	1	2	3	4	5	6	7
Going to the beach/surfing	1	2	3	4	5	6	7
Boating	1	2	3	4	5	6	7

Reflecting on your last visit to Prom Country, please rate your level of agreement with the following options that explain potential reasons for your choosing to take a short break or holiday.

Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
-------------------	---	---	---	---	---	---	---	----------------

10. I chose to take a break / holiday:							
To escape the everyday hustle and bustle of the city	1	2	3	4	5	6	7
To spend quality time with my family	1	2	3	4	5	6	7
To spend quality time with my partner	1	2	3	4	5	6	7
To experience something new and unique	1	2	3	4	5	6	7
To spend time with friends	1	2	3	4	5	6	7
To rest and relax	1	2	3	4	5	6	7
To experience nature							

SECTION C

The following questions ask you to consider your holiday preferences generally such as the types of experiences you seek in a holiday or short break, what is important to you when choosing a destination and finally we would like you to tell us about your preferred leisure activities. This kind of information allows us to tailor our tourism experiences to meet the needs of our tourism market – so to provide an experience that you are certain to enjoy!

For questions 11, 12 and 13 please rate your response to each item using the key located above each question.

Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
-------------------	---	---	---	---	---	---	---	----------------

11. When choosing a holiday I generally choose something that will offer:							
Quality Family Time	1	2	3	4	5	6	7
Rest and Relaxation	1	2	3	4	5	6	7
Romance	1	2	3	4	5	6	7
The opportunity to socialise with my friends	1	2	3	4	5	6	7
Nature Based Experiences	1	2	3	4	5	6	7
Sun Sand and Surf type Experiences	1	2	3	4	5	6	7

Something unique	1	2	3	4	5	6	7
An escape from the everyday routine	1	2	3	4	5	6	7
Variety	1	2	3	4	5	6	7
Action and Adventure	1	2	3	4	5	6	7
Cultural Festivals and Events	1	2	3	4	5	6	7
Quality Touring Routes	1	2	3	4	5	6	7

Extremely Unimportant	1	2	3	4	5	6	7	Extremely Important
-----------------------	---	---	---	---	---	---	---	---------------------

12. To be considered, a destination must:							
Be family friendly	1	2	3	4	5	6	7
Offer children's activities	1	2	3	4	5	6	7
Have good wineries	1	2	3	4	5	6	7
Be dog friendly	1	2	3	4	5	6	7
Offer activities such as swimming and hiking	1	2	3	4	5	6	7
Have good beaches	1	2	3	4	5	6	7
Offer a variety of accommodation options	1	2	3	4	5	6	7
Have good restaurants/cafes	1	2	3	4	5	6	7
Have unique attractions	1	2	3	4	5	6	7
Be peaceful	1	2	3	4	5	6	7
Offer Value for Money	1	2	3	4	5	6	7
Be relaxing	1	2	3	4	5	6	7
Have a good variety of attractions	1	2	3	4	5	6	7
Be 'easy' / Hassle Free	1	2	3	4	5	6	7

Be accessible (For example; wheelchair access)	1	2	3	4	5	6	7
Have nature based attractions	1	2	3	4	5	6	7

Please tell us a little about what you enjoy doing in your spare time by rating your preference for the following activities using the key below:

Don't Enjoy	1	2	3	4	5	6	7	Enjoy very much
-------------	---	---	---	---	---	---	---	-----------------

13. In my spare time I enjoy:

Hiking/bushwalking	1	2	3	4	5	6	7
Wildlife Viewing	1	2	3	4	5	6	7
Visiting historical sites and Museums	1	2	3	4	5	6	7
Swimming	1	2	3	4	5	6	7
Meeting people / socialising	1	2	3	4	5	6	7
Cycling	1	2	3	4	5	6	7
Four Wheel Driving	1	2	3	4	5	6	7
Fishing	1	2	3	4	5	6	7
Shopping	1	2	3	4	5	6	7
Sailing	1	2	3	4	5	6	7
Sunbathing on the beach	1	2	3	4	5	6	7
Reading	1	2	3	4	5	6	7
Hunting	1	2	3	4	5	6	7
Gardening	1	2	3	4	5	6	7
Golfing	1	2	3	4	5	6	7
Dining Out	1	2	3	4	5	6	7
Visiting wineries and gourmet food trails	1	2	3	4	5	6	7

Horse Racing	1	2	3	4	5	6	7
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SECTION D

Prom Country Tourism is dedicated to offering a memorable and enjoyable experience to all of visitors and we acknowledge that accommodation plays an important role when it comes to our tourism product offering. We are therefore interested in our visitor's accommodation preferences so we are able to monitor our performance in this area.

14. Generally, what is your preferred accommodation type? Please select one.

- a. Hotel
- b. Resort
- c. Motor Inn
- d. Bed and Breakfast
- e. Self Catering
- f. Camping
- g. Caravan / Motor home

15. Which of the following options best represents the amount you would spend on accommodation per night when travelling within Victoria? Please select one.

- a. \$10 - \$50 b. \$51 - \$100 c. \$101 - \$150 d. \$151 - \$200 e. \$201 - \$250 f. \$250+

16. Enclosed with this questionnaire are details of an accommodation option for your perusal. Please spend some time evaluating this information and indicate in the space provided how much you would be prepared to pay per night.

\$_____ Per Night

17. Should you choose to return to Prom Country, would you prefer that your chosen travel plans be offered as:

- € A package where one cost covers accommodation, food and activities / tours
- € A package that includes just meals and accommodation
- € A package that includes just accommodation with the option of booking tours / activities through the accommodation provider
- € Neither, I would like to pay for each individual activity separately

SECTION E

Finally, please tell us a little about yourself.

1. What age group do you belong?

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

2. What is your nationality? _____

Q3. What is your relationship Status?

- Single Married Couple / De-facto

Q4. How many children / dependants (if any) do you have living at home?

Q5. What is your occupation?

Q6. Where is your home? Town/ City _____ Post

Code _____

Q7. Please circle the following income bracket that best represents your combined family income *(Please let us remind you that the information collected in this study is collated in such a way that the identity of any one individual remains unknown to the both the researcher and interested parties)*

- Less than \$50,000 \$51,000 – \$100,000 \$101,000 – \$150,000
- \$150,000+

APPENDIX C

Prom Country Accommodation and Package Examples

Please see Email Attachment