May 2004

South Gippsland Shire

The Economic Impact of Tourism In Prom Country

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Urban Enterprise would also like to acknowledge the assistance of all tourism operators who completed business surveys and who assisted in the distribution of visitor surveys throughout the South Gippsland Shire.

1 Summary of the Economic Impact of Tourism

HIGHLIGHTS

- More than one million people visit the South Gippsland Shire each year.
- Visitors spend more than $213 million in the Shire each year.
- More than half of all businesses in the Shire rely on tourism for their income.
- 1700 jobs in the Shire are directly attributed to tourism.
- Two thirds of tourism – related businesses expect to increase earnings this year and almost one quarter of all businesses expect to increase employment.

1.1 VISITATION

The South Gippsland Shire attracts an estimated 1.1 million visitors annually, composing of 577,000 daytrip visitors, and 573,000 overnight visitors. Almost half of all overnight visitors stay in holiday homes. 18% are staying in caravans and camping and 16% stay in cabin accommodation. (Wilson's Promontory contributes 31% of total visitors staying in caravan parks, and 54% of visitors staying in cabins).

Accommodation Type	Number of Overnight Visitors	% of Total Overnight Visitors	Visitor Nights (Guest Nights)
Guest Houses	3,163	1%	5,378
Hotels	7,084	1%	12,043
B&Bs	7,697	1%	13,086
Backpackers	13,448	2%	22,861
Motels	36,663	6%	62,327
Self Contained	55,736	10%	94,752
Cabins	92,262	16%	156,845
Camping Sites	103,265	18%	663,246
Holiday Homes	257,235	45%	917,320
Total Overnight Visitors	576,553	100%	1,947,858

Source: Urban Enterprise: *Based on a survey of all accommodation establishments and holiday homes survey*

1.2 EXPENDITURE BY VISITORS

Total Direct Visitor Expenditure

Visitors to the South Gippsland Shire spend an estimated $213 million in the Shire annually.

Visitors staying in holiday homes spend $72 million in the Shire annually.

Overnight visitors spend $103 million in the Shire annually whilst daytrip visitors spend $38 million.

Visitor Type	Total Visitor Expenditure	% of Total Expenditure
Holiday home visitors[1]	$72,228,000	27%
Overnight visitors (excluding holiday home visitors)[2]	$102,753,172	58%
Daytrip visitors[3]	$38,233,000	15%
Total Visitor expenditure	$213,214,172	100%

Source: Urban Enterprise, Bureau of Tourism Research: *National Visitor Survey 2003*

Direct Expenditure Per Person Per Visit

Visitors staying in holiday homes spend $280 per person per visit.

Overnight visitors spend $322 per person per visit; daytrip visitors spend $66 per person per visit.

Visitor Type	Visitor Expenditure Per Person Per Visit
Holiday home visitors	$280
Overnight visitors (excluding holiday home visitors)	$322
Daytrip visitors	$66

Source: Urban Enterprise, Bureau of Tourism Research: *National Visitor Survey 2003*

[1] Average expenditure per visitor staying in holiday homes multiplied by total visitors staying in holiday homes.

[2] Average expenditure by overnight visitors multiplied by the total of overnight visitors for each accommodation type.

[3] Average expenditure per daytrip visitor (from BTR) multiplied by total daytrip visitors (using the proportion of daytrip to overnight visitors derived from NVS but based on estimates of overnight visitors calculated by Urban Enterprise).

Indirect Expenditure

Indirect expenditure is the flow on effects on all other industries not directly related to tourism with the changes in demand arising from visitor expenditure. Indirect expenditure from visitation to the South Gippsland Shire is estimated to be $143 million per annum[4].

1.3 BUSINESSES INVOLVED IN TOURISM

There are over 1200 businesses in the South Gippsland Shire. This includes agri-business (farms), as well as commercial, industrial and retail businesses.

Tourism businesses in the Shire include visitor accommodation establishments and specialised tourism businesses such as wineries, attractions, tours and activities, and restaurants. There are more than 250 of these businesses in the Shire, equating to 21% of all businesses within the Shire.

A further 416 businesses in the Shire receive an average of 22% of their income from visitors. These businesses include supermarkets, specialised food retailing, department stores, motor vehicle retailing and other retail businesses, which are likely to benefit from visitors.

Specialised tourism businesses make up 6% of all businesses in the Shire. Specialised tourism businesses include wineries, tours and activities, restaurants, gourmet food retail and attractions. Visitor accommodation is also tourism – related, but has been separately identified.

Overall, tourism underpins the business income of 675 of the businesses in the Shire (55% of all businesses). This is summarised in the following table.

Business Category	Number of Businesses	% of Total Businesses
Accommodation	187	15%
Specialised tourism	72	6%
Other businesses that benefit from tourism	416	38%
Sub Total (all businesses which benefit directly from visitors to the Shire)	**675**	**55%**
Businesses which do not benefit directly from visitors to the Shire	559	45%
Total Businesses in the South Gippsland Shire	1234	100%

Source: Urban Enterprise: *Based on a survey of all tourism – related businesses.*

[4] Indirect expenditure is calculated by using a multiplier. The multiplier adopted is 0.673-based research undertaken by BTR. The multiplier is the average flow on expenditure in a specific region from every dollar of visitor expenditure.

1.4 EMPLOYMENT IN TOURISM

More that 1700 persons in the South Gippsland Shire are employed as a result of tourism. This represents 16% of the labour force in the South Gippsland Shire.

Accommodation establishments employ 610 persons and specialised tourism businesses employ 591 persons.

Business Category	Persons Employed in tourism related businesses
Accommodation businesses	610
Specialised tourism businesses	591
Other businesses that benefit from tourism[5]	515
Total (all businesses which benefit directly from visitors to the Shire)	***1716***

Source: Urban Enterprise: *Based on a survey of all tourism-related businesses*

[5] The number of persons employed as result of the impact of tourism for other businesses that benefit from tourism is calculated by taking the proportion of gross income attributed to visitor expenditure multiplied by the total number of employees in these businesses.

1.5 BUSINESS INCOME

Percentage of Business Turnover Generated From Visitors

Accommodation businesses and specialised tourism businesses clearly generate all or most of their income from visitors.

Other businesses that benefit from tourism, including grocery stores, sport and recreation and specialised food retailing generate over 20% of their income on average from visitors. This is shown in the table below.

Category of Business	% of Gross Turnover Generated by Visitors
Supermarket & Grocery Stores	32%
Sport and Recreation	14%
Specialised Food Retailing	36%
Restaurants/Cafes	39%
Recreational Goods Retailing	51%
Personal & House Retail &Services	12%
Motor Vehicle Retailing	11%
Furniture, Household & Appliance Retail	8%
Clothing and Soft Good Retail	12%
Property Services	25%
Average for All Other Businesses	**22%**

Source: Urban Enterprise

1.6 CAPITAL INVESTMENT

Tourism –related businesses in the South Gippsland Shire invested $7.2 million in 2002/2003 in capital improvements. Capital was invested in new buildings, renovations, fittings, equipment and vehicles.

Accommodation businesses invested over $4.3 million in capital improvements followed by specialised tourism businesses ($1.7 million) as shown in the table below.

Business Category	**Capital Investment Made by Tourism Related Businesses ($Million)**
Accommodation businesses	$4.3
Specialised tourism businesses	$1.7
Other businesses that benefit from tourism[6]	$1.2
Total (all businesses which benefit directly from visitors to the Shire)	$7.2

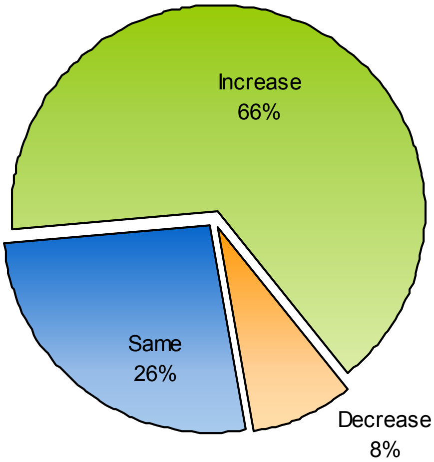
Source: Urban Enterprise

[6] Capital investment for these businesses is calculated by taking the proportion of gross income attributed to visitor expenditure multiplied by the capital investment reported by the businesses.

1.7 FUTURE TRENDS

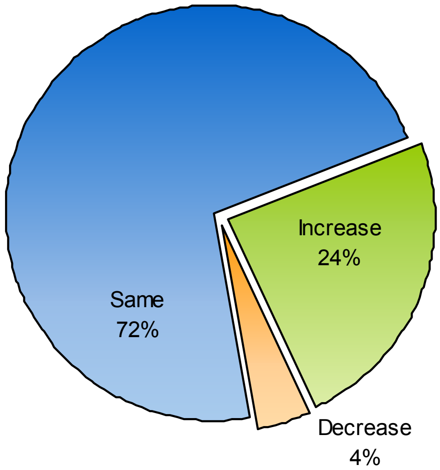
Expected Change in Business Turnover 2004

445 businesses that benefit from visitation to the Shire expect an increase in gross turnover in 2004, this represents two thirds of all tourism businesses.



Expected Change in Persons Employed 2004

One quarter of businesses (162) that benefit from visitation to the Shire expect to increase the number of staff employed in their business. The majority of businesses that expect no change in the number persons employed are small businesses such as bed and breakfasts accommodation.



Source: Urban Enterprise: Profile of Visitor Accommodation, Profile of Specialised Tourism Businesses, Profile of Other Businesses That Benefit From Tourism

2 Introduction

2.1 BACKGROUND

Urban Enterprise Pty Ltd was commissioned in April 2003 to undertake a study into the economic impact of tourism in the South Gippsland Shire (Prom Country Region).

The aim of the study is to obtain the following:

- Establish baseline information regarding the size and nature of the tourism industry in the region
- Provide quantitative information that would facilitate investment in tourism infrastructure by both public and private sectors
- Provide relevant information about the tourism industry and its performance to prospective investors in the region
- Measure the effectiveness of existing marketing and promotional campaigns
- Inform future marketing and promotional campaigns in the region

2.2 BRIEF

The South Gippsland Shire sought a consultancy to undertake quantitative research, which will measure the economic impact of tourism within the Shire. The consultant is required to liase with industry and undertake visitor and industry surveys in order to obtain reflective information on the tourism industry.

The initial timeline for the project was over an 18-month period, however due to funding restrictions this was decreased to a 10-month period. The project began in April 2003 and was completed in May 2004.

2.3 SCOPE OF WORKS

The following works were undertaken as part of the economic impact study over the 10-month period.

Data in this report is sourced from primary research undertaken by Urban Enterprise in the period August 2003 – April 2004.

Industry Audit and Creation of Databases

The compilation of a holiday homeowner's database, and industry databases was undertaken as a result of an audit of existing databases from South Gippsland Shire and independent sources. The databases were used for survey mail outs and extrapolation of results.

Holiday Home Owners Survey

The holiday homeowners survey was mailed to 1000 holiday homeowners in late August 2003. The survey was collected and results collated in September 2003.

Visitor Survey

The visitor survey was distributed to visitors in 130 locations across the Shire in October 2003 – March 2004. The survey results were collated in April 2004.

Survey of Visitor Accommodation

The survey of visitor accommodation was mailed to all accommodation businesses in the Shire in late August 2003. Completed surveys were received before the end of September 2003. A follow up survey over the phone was conducted for all businesses, which did not complete the mailed out survey. The survey results were collated in September 2003.

Survey of Specialised Tourism Businesses

A survey was mailed to all identified specialised tourism businesses in the Shire in October 2003. Completed surveys were received before the end of October 2003. A follow up survey over the phone was conducted for all businesses, which did not complete the mailed out survey. Results were collated in November 2003.

Survey of Other Relevant Businesses

A survey was mailed to all businesses in the Shire, which were identified as likely to benefit from tourist visitation. Completed surveys were received before October 2003 and survey results were collated in November 2003.

Reporting of the Results

Results from the surveys have been released at intervals throughout the study period. The final report document contains all results from the surveys and the economic impact of tourism in the South Gippsland Shire.

2.4 SURVEY METHODOLGY

A detailed methodology for each of the five surveys is contained in their corresponding sections of this report.

All data in the report has been sourced from results obtained from the five surveys conducted for the project and supplemented by the National Visitor Survey results 2003 undertaken by the Bureau of Tourism Research.

Total visitor numbers and expenditure figures can be obtained from the Bureau of Tourism Research using CDMota, however the error margins are too great at the local level.[7] Therefore the results from the accommodation and holiday homes surveys undertaken by Urban Enterprise have been used to estimate total visitor numbers, as these results are more reliable.

[7] For example, NVS data on visitors to the South Gippsland Shire has an error margin of 20%, i.e. the actual visitor numbers could vary +/- 20% from those estimated at the 95% confidence interval.

3 Profile of Visitors

HIGHLIGHTS

- The South Gippsland Shire attracts an estimated 1.1 million visitors annually.
- Wilson's Promontory is a significant attraction for visitors to South Gippsland Shire, with 72% visiting a National Park.
- Daytrip and overnight visitors to the South Gippsland Shire (not including those staying in holiday homes) spend $141 million per annum in the Shire.

3.1 KEY FINDINGS

Number of Visitors

South Gippsland Shire attracts an estimated 1.1 million visitors annually. Of these 577,000 are overnight visitors and 573,000 are daytrip visitors.

Reason for Visiting

68% of visitors to the South Gippsland are visiting for "holiday or leisure".

28% of visitors to South Gippsland Shire are regular visitors, a further 20% were recommended to visit.

The Internet was the most widely used information source, with 32% of visitors using it to plan their trip.

Visitor Origin

73% of visitors to the South Gippsland Shire are from Melbourne. 14% of visitors are from country Victoria, 11% are from interstate and a further 3% are from overseas.

Overnight Stays

50% of visitors are staying overnight. The average length of stay for overnight visitors is 3.7 nights.

44% of overnight visitors stay in paid accommodation, of these 40% stay in caravan parks or were camping.

<u>Visitor Activities</u>

76% of visitors to the South Gippsland Shire went general sightseeing, 72% visited a national park, and a further 56% of visitors went to the beach.

<u>Visitor Expenditure</u>

Daytrip visitors to the South Gippsland Shire spend an estimated $38 million annually. Overnight visitors to the South Gippsland Shire (excluding visitors staying in holiday homes) spend an estimated $103 million annually.

Daytrip visitors spend an estimated $66 per person per visit. Overnight visitors (excluding visitors staying holiday homes) spend an estimated $322 per person per visit.

<u>Visitor Perception</u>

52% of visitors perceive the South Gippsland Shire as being “relaxing and peaceful”. 43% of visitors to the South Gippsland Shire associated it with Wilson’s Promontory.

<u>Visitor Satisfaction</u>

Visitors were generally satisfied with visitor information, the range of activities available, tourist signage, accommodation, customer service and picnic and BBQ areas.

Visitors were most satisfied with the accommodation in the South Gippsland Shire; Visitors were least satisfied with public toilets.

3.2 INTRODUCTION

This section provides a profile of visitors to Prom Country, including key economic indicators such as visitor expenditure, expenditure items, accommodation type used, and proportion of overnight visitors compared to daytrip visitors.

The data is sourced from a visitor survey conducted from October 2003 to March 2004. Quantitative data is supplemented with the National Visitor Survey 2003 conducted by the Bureau of Tourism Research, where the data is reliable at the LGA level.

Methodology

The survey collected data for the following:

- Reason for visit
- Influence of visit
- Previous visit to Shire
- Type of travel party
- Overnight stay
- Accommodation type
- Number of nights stay
- Activities undertaken
- Visitor perception
- Age group
- Intention to revisit
- Visitor origin

The survey questionnaires were distributed to 130 tourism businesses in the South Gippsland Shire as well as the Shire's visitor information centres (VICs). Visitors to these businesses and VICs were encouraged to complete the survey.

Survey Period

Visitors completed the surveys over a six-month period from October 2003 - March 2004.

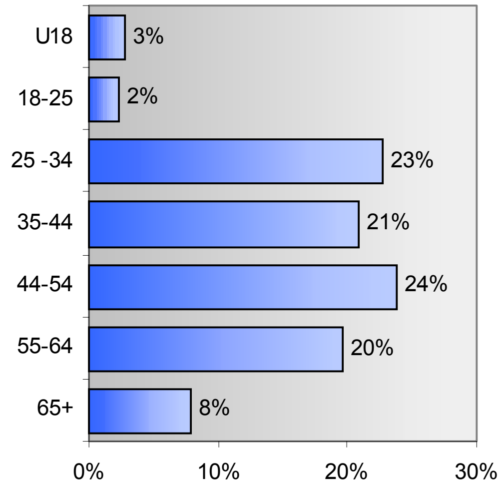
Survey Sample

434 completed responses were received from visitors to South Gippsland Shire.

The survey responses for each town/location are shown below:

Town/Location	Number of responses
Foster	96
Yanakie	76
Korumburra	31
Loch	29
Leongatha	28
Sandy point	27
Waratah Bay	22
Koonwarra	18
Welshpool	18
Toora	17
Mirboo North	18
Port Welshpool	11
Bena	10
Tarwin lower	8
Fish Creek	8
Lyrebird Hill Winery	4
Wilsons prom	3
Waratah North	3
Tarra Valley	3
Walkerville North	2
Venus Bay	2
Total	434

The age groups of respondents to the survey are shown below:



Although not a random sample the survey results are considered to be reliable due to the broad sample of visitors surveyed from 28 locations throughout the Shire. In addition to this the sample size is considered statistically significant with 434 survey respondents.

3.3 NUMBER OF VISITORS

TOTAL VISITORS

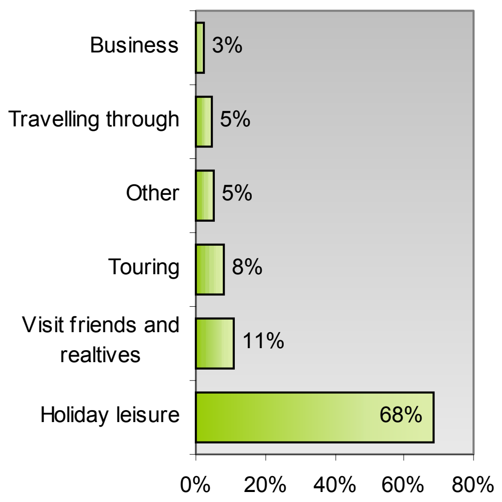
South Gippsland Shire attracts an estimated 1.1 million visitors annually, comprising an estimated 573,000 overnight visitors[8] annually and 577,000 daytrip visitors. [9]

3.4 REASON FOR VISIT

MAIN PURPOSE OF VISIT

Over two thirds of visitors to South Gippsland Shire visit for "holiday or leisure".

A further 11% are "visiting friends and relatives".

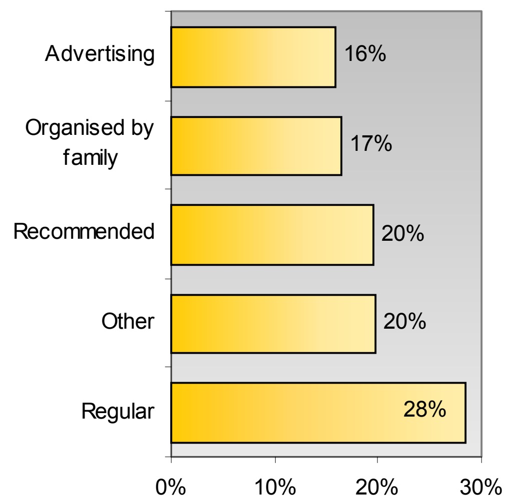


INFLUENCE OF VISIT

28% of visitors to the South Gippsland Shire are "regular" visitors.

20% of visitors to the Shire were influenced by a "recommendation" to visit the area.

17% of visitor trips were organised by another family member.



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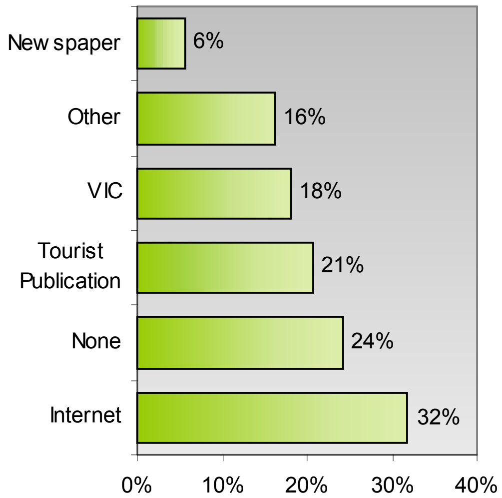
[8] Overnight visitors are calculated by adding the number of persons using paid accommodation to those staying in holiday homes as identified by the primary research recently undertaken. This compares with the NVS data, which identifies around 450,000 overnight visitors. The NVS data has an accuracy of +/- 20% at the 95% confidence interval, in comparison the estimates calculated by Urban Enterprise are considered far more accurate as they are taken from a census of all accommodation establishments as well as holiday home owners.

[9] Total daytrip visitors are calculated by multiplying the total overnight visitors (calculated from the accommodation and holiday home surveys) by the proportion of daytrip visitors identified by the NVS for South Gippsland Shire.

INFORMATION SOURCE

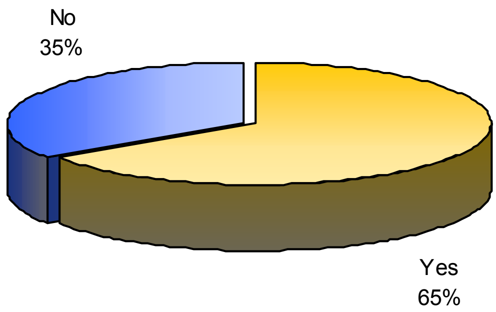
Almost one third of all visitors to the South Gippsland Shire used the "Internet" to plan their trip.

21% of visitors used a "tourist publication" and a further 18% used a "visitor information centre" to plan their trip.



PREVIOUS VISITATION

65% of visitors to South Gippsland Shire have visited previously.



3.5 VISITOR ORIGIN

73% of visitors to the South Gippsland Shire are from Melbourne. A further 14% are from country Victoria.

11% of visitors are from interstate and 3% are from overseas.

Origin	% of Total Visitors
Melbourne	73%
Country Victoria	14%
Interstate	11%
Overseas	3%

INTERSTATE ORIGIN

6% of interstate visitors are from New South Wales; a further 2% are from Western Australia.

State of Origin	% of Total Visitors
Victoria	86%
New South Wales	6%
Western Australia	2%
Queensland	1%
South Australia	1%
Tasmania	0%

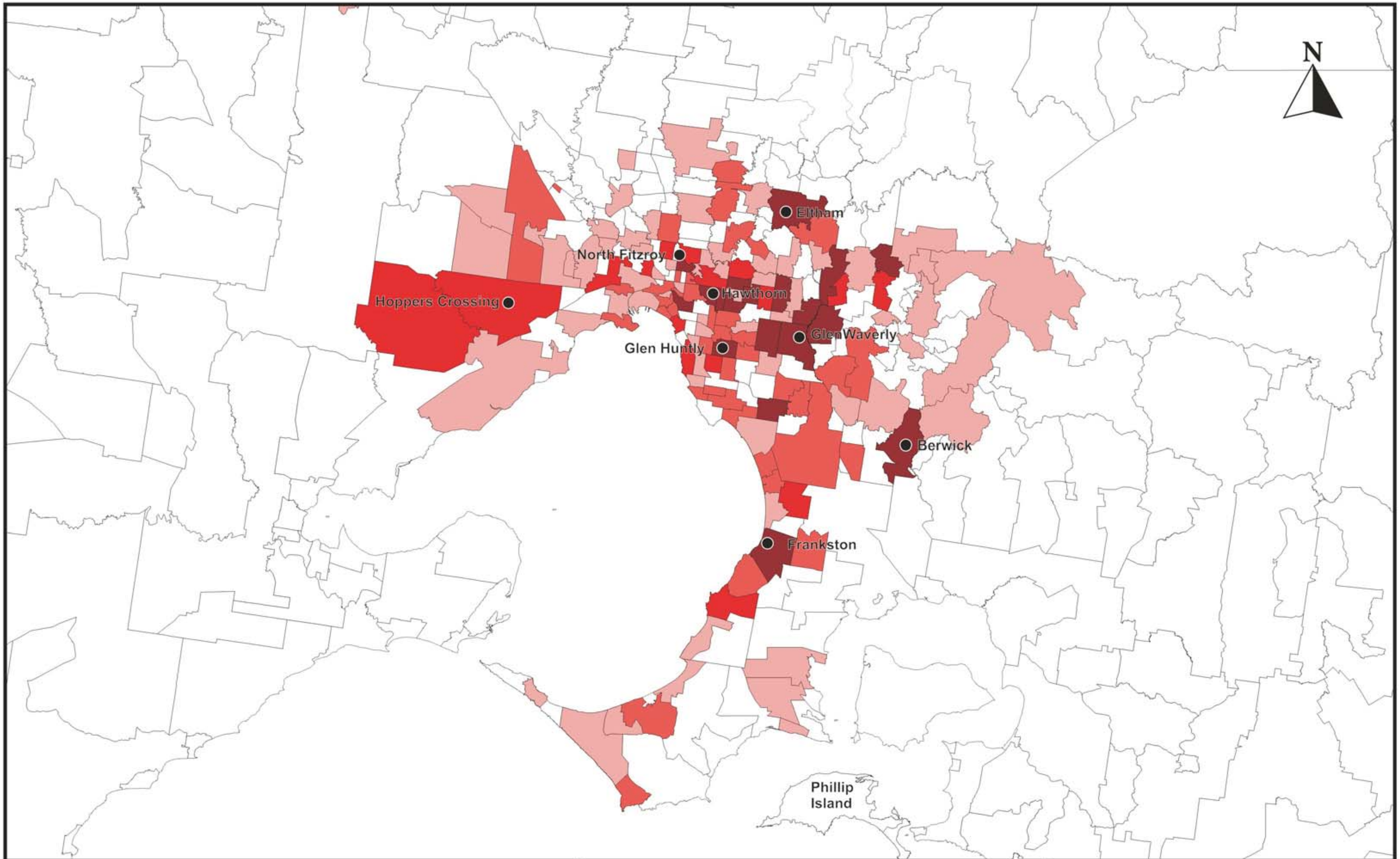
SPATIAL ORIGIN OF VISITORS FROM MELBOURNE

Visitors from Melbourne have their origins spread spatially throughout the entire metropolitan area, from western suburbs such as Hoppers Crossing to southeastern suburbs such as Frankston. There is a concentration of visitors from inner eastern suburbs south of the Yarra River such as Hawthorn and Camberwell, as well as middle eastern suburbs such as Glen Waverley. There is also a concentration of visitors who reside in northeastern suburbs such as Eltham.

Approximately two thirds of visitors to the South Gippsland Shire are from the eastern and south-eastern suburbs of Melbourne.

SPATIAL ORIGIN OF VISITORS FROM COUNTRY VICTORIA

Visitors from country Victoria come mainly from regional centres including Moe and Morwell, Ballarat, Bendigo and Geelong.



South Gippsland Shire - Origin of Visitors from

Metropolitan Melbourne

Number of Visitors per Post Code

6+ | 4 to 5 | 2 to 3 | 1

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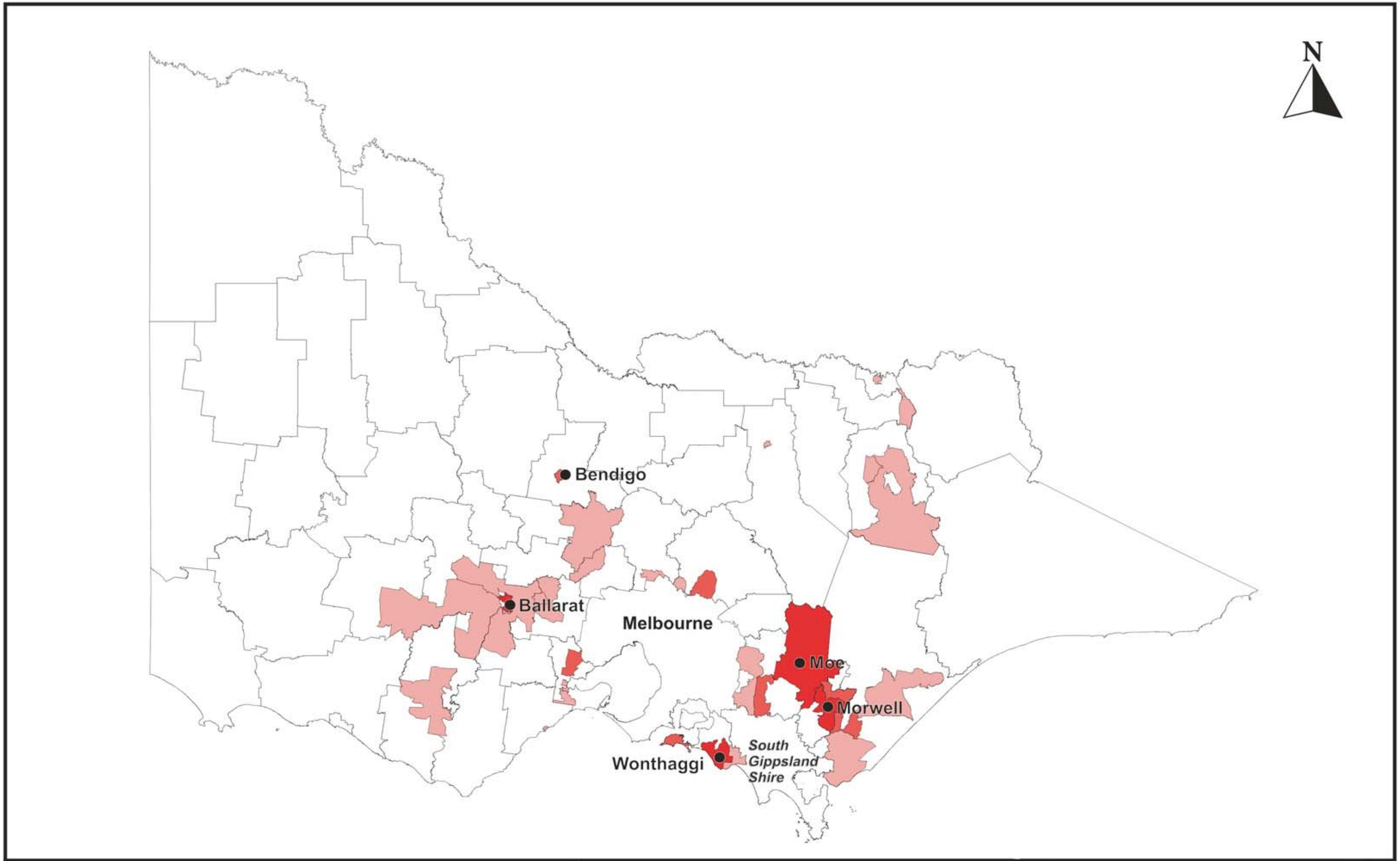

South Gippsland Shire - Origin of Visitors from

Country Victoria

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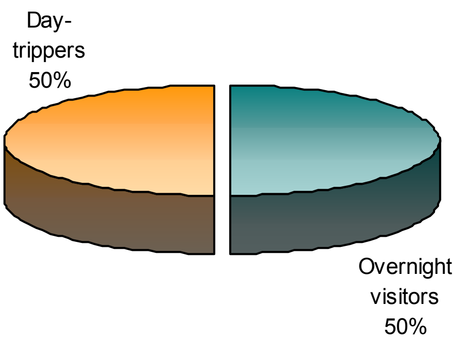
3.6 OVERNIGHT STAYS

PROPORTION STAYING OVERNIGHT

The South Gippsland Shire attracts an equal proportion of daytrip and overnight visitors.

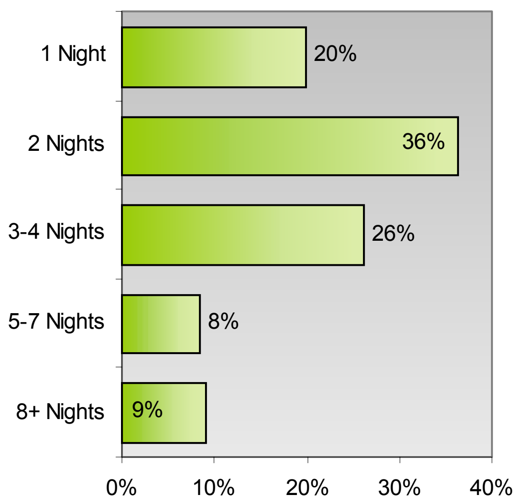


Source: Bureau of Tourism Research, National Visitor Survey 2003

LENGTH OF STAY

The average length of stay for overnight visitors is 3.7 nights; this is a similar result as that found by visitors staying holiday homes who stay for 3.6 nights.

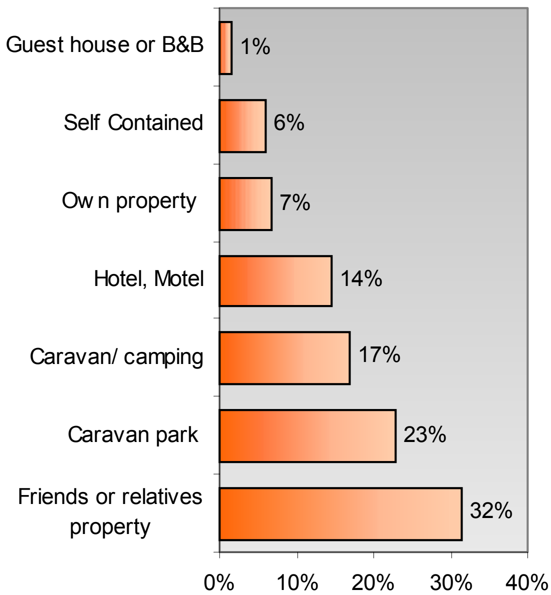
36% of overnight visitors stay 2 nights, a further 26% stay between 3-4 nights.



ACCOMMODATION TYPE[10]

Almost one third of visitors stay with "friends or relatives" when visiting South Gippsland Shire.

44% of visitors to South Gippsland Shire stay in paid accommodation.



Source: Bureau of Tourism Research, National Visitor Survey 2003

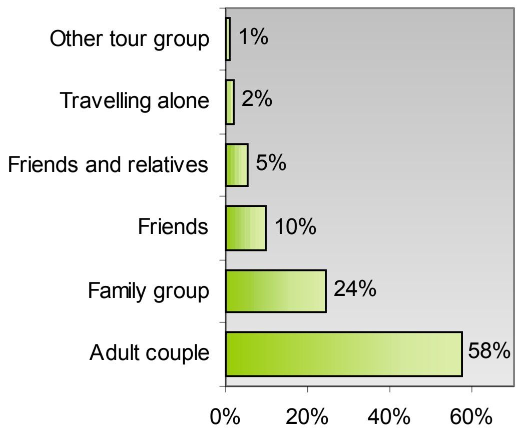
[10] The accommodation type data has been sourced from BTR for South Gippsland Shire, as the results from the Survey of Visitors conducted by Urban Enterprise were skewed due to the large amount of surveys completed at B&B accommodation.

3.7 VISITOR PROFILE

TRAVEL PARTY

58% of people visiting the South Gippsland Shire travel as an "adult couple".

One quarter of visitors to the South Gippsland Shire travel in a "family group".



VISITOR ACTIVITIES

Three quarters of visitors to the South Gippsland Shire were "general sightseeing" on their visit.

72% of visitors went to a "national park" when visiting South Gippsland Shire. A further 56% "went to the beach".

Activity	% of total visitors
General Sightseeing	76%
National park	72%
Go to Beach	56%
Bushwalking	43%
Eat out	35%
Visit food producer	21%
Go shopping	19%
Picnics	19%
Visit friends and relatives	17%
Visit heritage	16%
Visit winery	15%
Fishing	12%
Outdoor Activities	11%
Other	8%
Attend festivals, events	8%
Touring	8%
Visit farms	7%
Cycling	5%
Other Sports	3%
Boating	3%
Other water sports	2%
Guided tour	2%
Trail Biking	1%

3.8 VISITOR EXPENDITURE

DAYTRIP EXPENDITURE[11]

Total Daytrip Expenditure

Daytrip visitors to the South Gippsland Shire spend an estimated $38 million annually. Daytrip visitors spend most on “food and drink” and “travel” ($12 million on each).

Expenditure Item	Amount $
Travel	$12,059,283
Food and drink	$12,406,141
Shopping	$8,231,927
Entertainment	$626,198
Other	$4,908,971
Total	$38,232,521

Source: Daytrip data is sourced from the bureau of tourism research

Daytrip Expenditure per Person

Daytrip visitors spend an estimated $66 per person per visit.

Expenditure Item	Amount $
Travel	$21
Food and drink	$21
Shopping	$14
Entertainment	$1
Other	$8
Total	$66

Source: Daytrip data is sourced from the bureau of tourism research

[11] The expenditure data above has been sourced from the Bureau of Tourism Research, as the sample of daytrip visitors from the visitor survey was not large enough to conclude results from.

OVERNIGHT EXPENDITURE

Total Overnight Expenditure

The data below excludes visitors staying in holiday homes.

Overnight visitors (excluding holiday home visitors) spend an estimated total of $102 million in the South Gippsland Shire annually.

Overnight visitors spend a total of $37 million on accommodation when visiting the South Gippsland Shire.

Expenditure Item	$Amount
Travel	$17,676,289
Accommodation	$37,179,628[12]
Food and Drink	$26,382,462
Shopping	$12,919,697
Entertainment	$4,190,871
Other	$4,404,225
Total	$102,753,172

Overnight Expenditure per Person per Visit

Visitors spend an average $322 per person per visit when visiting the South Gippsland Shire.

Overnight visitors spend most per person per visit on accommodation ($116).

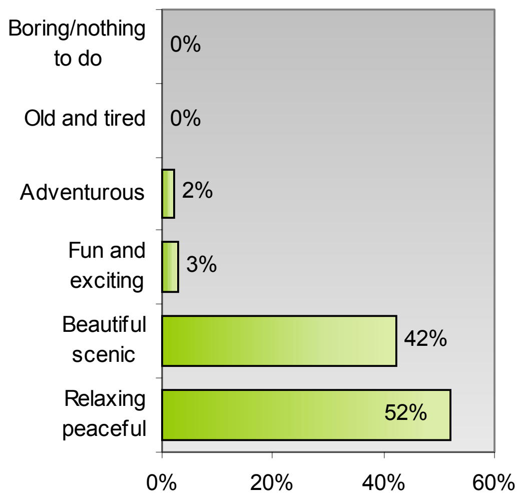
Expenditure Item	$Amount
Travel	$55
Accommodation	$116
Food and Drink	$83
Shopping	$40
Entertainment	$13
Other	$14
Total	$322

[12] Expenditure on accommodation by visitors is significantly higher than takings reported by accommodation establishments. One explanation for the variance is that supply side analysis (survey of accommodation establishments) does not include holiday homes for rent. However from the holiday homes reaseach it is found that more than 15% of holiday homes (over 350 dwellings) are sub-let during the year by owners. This is not included in the estimated takings for accommodation establishments in this report. Furthermore it is possible that some accommodation establishments may be understating their takings. The expenditure on accommodation as shown above is similar to the estimates made by the BTR in the National Visitor Survey 2003.

3.9 VISITOR PERCEPTION

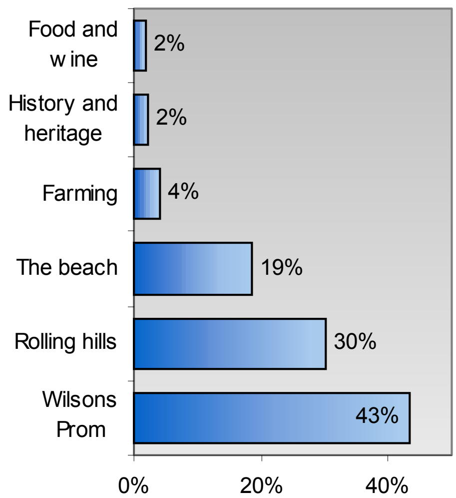
VISITOR PERCEPTION WITH SOUTH GIPPSLAND SHIRE

52% of visitors perceived South Gippsland Shire as "relaxing and peaceful". A further 42% of visitors perceived South Gippsland Shire as "beautiful and scenic".



CHARACTERISTICS ASSOCIATED WITH SOUTH GIPPSLAND SHIRE

92% of visitors most closely associated South Gippsland Shire with natural attractions. 43% specifically associated South Gippsland Shire with "Wilson's Promontory".



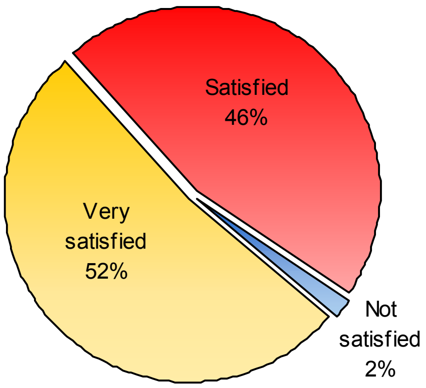
3.10 VISITOR SATISFACTION

Visitors were most satisfied with accommodation on their visit to the South Gippsland Shire, with 70% of visitors "very satisfied" and 28% "satisfied".

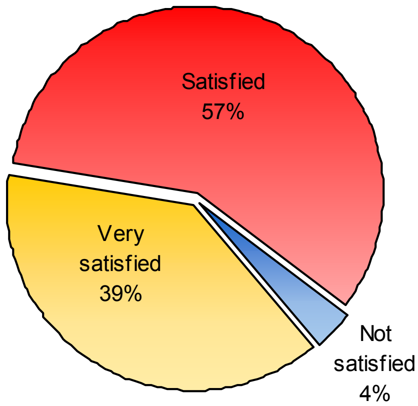
More than half (52%) were "very satisfied" with visitor information.

Only 39% of visitors were "very satisfied" with the activities available.

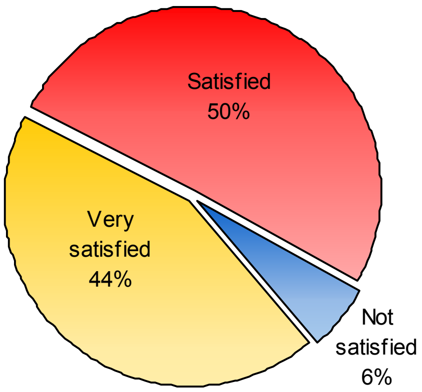
VISITOR INFORMATION



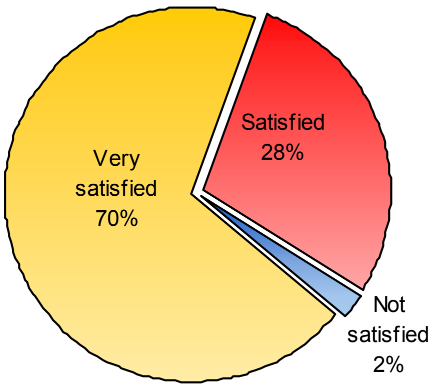
ACTIVITIES AVAILABLE



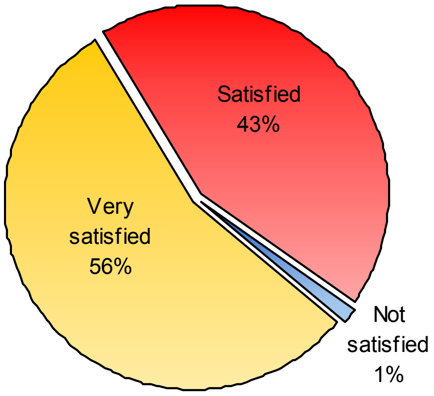
TOURIST SIGNAGE



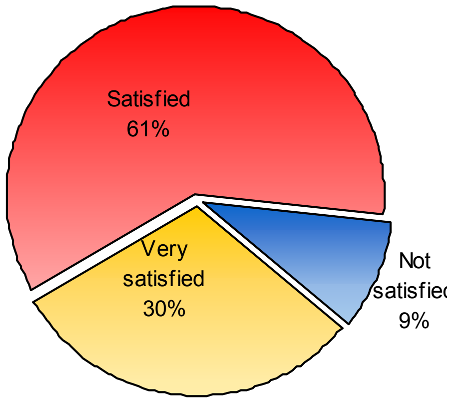
ACCOMMODATION



CUSTOMER SERVICE

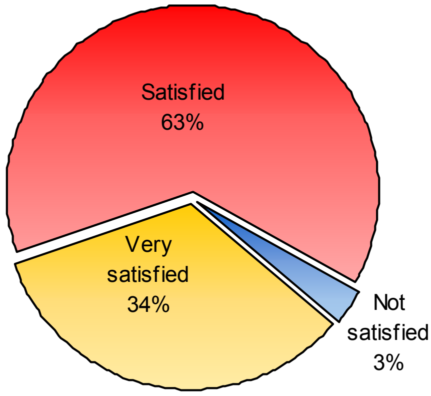


PUBLIC TOILETS



Only 30% of visitors were “very satisfied” with public toilets and only 34% were “very satisfied with “picnic tables and BBQ areas”.

PICNIC AND BBQ AREAS



4 Profile of Holiday Homes

HIGHLIGHTS

- There are almost 2500 holiday homes in the South Gippsland Shire – one quarter of the housing stock.
- Holiday homes attract over 257,000 visitors to South Gippsland Shire each year. (Almost half of all overnight visitors).
- Visitors staying in holiday homes spend more than $72 million in South Gippsland Shire each year.

4.1 KEY FINDINGS

Number and Location of Holiday Homes

- There are an estimated 2458 holiday homes in the South Gippsland Shire. This is around one quarter of all residential properties in the Shire.
- The majority of holiday homes in the South Gippsland Shire are located in Venus Bay (40% of holiday houses) and Sandy Point (18%).

Characteristics of Holiday Home Ownership

- The vast majority of holiday homeowners (89%) live in Melbourne.
- The main reason for purchasing a holiday home in the South Gippsland Shire was the natural beauty and tranquillity of the area.
- Almost half of all holiday homeowners have owned their holiday home for more than 11 years.

Visitation Generated by Holiday Homes

- An estimated 257,000 visitors stay in holiday homes in the South Gippsland Shire each year.
- Three quarters of visitors staying in holiday homes are owners and their families.
- An estimated 917,000 visitor days are spent in holiday homes each year in the South Gippsland Shire.

- The average length of stay for visitors staying in holiday homes is 3.6 days per visit.
- The average number of visits per holiday home is 27 days per year.
- Visitation and length of stay is clearly higher in the summer months. The actual visits made to holiday homes are generally steady through the rest of the year.

Visitor Activities

- The most popular activity undertaken by visitors staying in holiday homes is “going to the beach” (90%).
- “General sightseeing” (66%) and “fishing” (61%) are also popular activities. Visitors staying in holiday homes in Port Welshpool prefer to “go fishing” (89%), or “go boating” (79%).

Expenditure

- Visitors staying in holiday homes spend an estimated $72 million per year within the South Gippsland Shire.
- Average expenditure per person per visit is $280.
- Visitors spend most money on food and drink ($30 million).
- Holiday homeowners in the South Gippsland Shire spend over $5 million per year on holiday home and garden maintenance.
- An average of $2102 is spent each year on holiday home maintenance, per home.

4.2 INTRODUCTION

This section provides an analysis of the economic impact of holiday homes in South Gippsland Shire.

Methodology

Holiday homeowners were identified using the South Gippsland Shire's property database. They were identified using the following method:

- All residential properties were identified (non-improved or vacant land was excluded);
- Owners of these properties who live outside the South Gippsland Shire were identified;
- Public or private company / business owners were excluded.

A random sample of 1000 holiday homeowners were sent a questionnaire designed to collect the following information:

- Reason for purchasing holiday home in area
- Length of ownership of holiday home
- Number of visits
- Number of days holiday home was used
- Activities undertaken
- Expenditure

Information requested related to the financial year 2002-2003.

275 completed responses were received from holiday homeowners. Results were extrapolated for all holiday houses to calculate visitation and expenditure.

The following formula was used for extrapolation:

Averages for completed surveys	**X**	**Total holiday homes in database**	**=**	**Total number**

Using the 95% confidence interval, the margin for error for the survey is calculated at 5%. This means that we can be 95% confident that the actual results for the survey are within 5% of the results shown.

This is an acceptable error margin for the purposes of this study.

4.3 NUMBER OF HOLIDAY HOMES

2458 holiday homes were identified from the Council property database of 9,906 residential properties in the South Gippsland Shire. In other words approximately one quarter of all residential properties in the Shire are holiday homes.

This is verified by an analysis of unoccupied dwellings as identified by the ABS 2001 census in South Gippsland Shire. The proportion of unoccupied dwellings on census night is similar to the proportion of holiday homes as identified by the consultants from the council's database.

4.4 LOCATION OF HOLIDAY HOMES

The Table below shows the location of holiday homes in the Shire.

Town	Number of holiday homes	% of total holiday homes	% of total responses received
Venus Bay	993	40%	50%
Sandy Point	449	18%	21%
Walkerville	141	6%	4%
Foster	117	5%	2%
Korumburra	113	5%	1%
Leongatha	84	3%	1%
Port Welshpool	73	3%	5%
Mirboo North	71	3%	1%
Waratah Bay	58	2%	2%
Toora	51	2%	1%
Fish Creek	40	2%	2%
Nyora	35	1%	0%
Yanakie	34	1%	2%
Kongwak area	26	1%	0%
Tarwin Lower	25	1%	1%
Welshpool	25	1%	6%
Poowong	19	1%	0%
Loch	16	1%	0%
Meeniyan	16	1%	0%
Port Franklin	16	1%	0%
Waratah North	15	1%	1%
Kardella	13	1%	0%
Other	13	1%	0%
Dumbalk	11	0%	0%
Bena	4	0%	0%
Total	2458	100%	100%

The Table indicates that the survey responses received are a reasonably representative sample of the distribution of holiday homes throughout the Shire.

Venus Bay has the most holiday homes in the South Gippsland Shire, (almost 1000 holiday homes, making up 40% of the holiday homes in the Shire). This is followed by Sandy Point (449 holiday homes, representing 18% of holiday homes).

4.5 ORIGIN OF HOLIDAY HOME OWNERS

Origin of Owners	Number of Owners	Percentage of Owners
Metropolitan Melbourne	2171	89%
Country Victoria	226	9%
Interstate	61	2%
Total	**2458**	**100%**

89% of holiday homeowners live in Metropolitan Melbourne. A further 9% live in country Victoria and 2% of holiday homeowners live interstate.

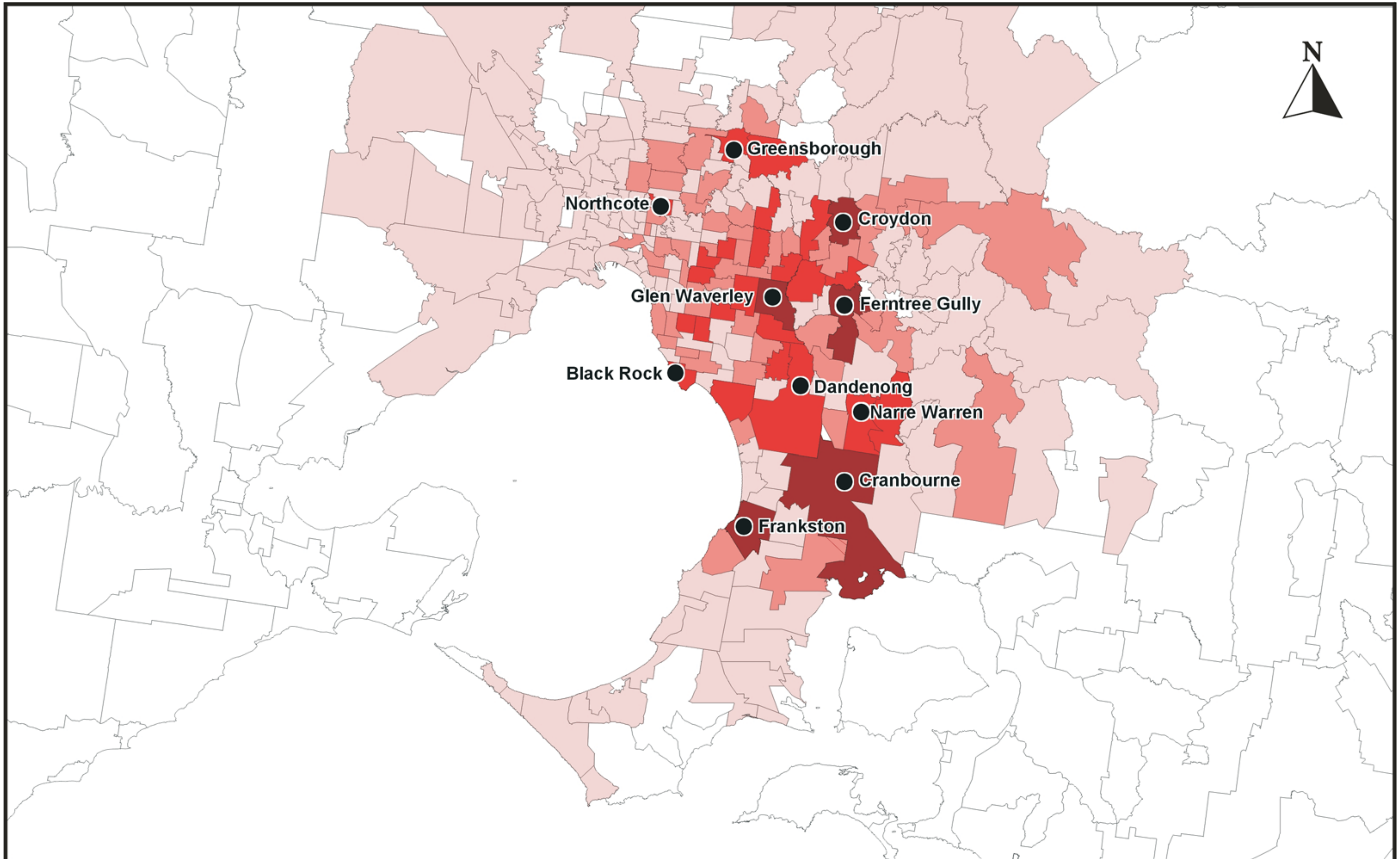
MELBOURNE METROPOLITAN AREA

The following Table shows the suburbs of Melbourne that have the highest number of owners of holiday homes in the South Gippsland Shire.

	Suburbs	Postcode	Number of Holiday Home Owners
1	Glen Waverley	3150	66
2	Ferntree Gully / Lysterfield	3156	47
3	Frankston	3199	45
4	Croydon	3136	40
5	Cranbourne	3977	34
6	Wantirna / Knox City Centre	3152	28
7	Chadstone	3148	28
8	Dandenong	3175	28
9	Oakleigh	3166	27
10	Eltham	3095	27

Persons living in the eastern suburbs of Melbourne make up over three quarters of all holiday homeowners in the South Gippsland Shire.

The map on the following page highlights where the holiday homeowners live.



South Gippsland Shire Origin of Holiday Home Owners in

Metropolitan Melbourne

Number of Holiday Home Owners per Post Code

- 31+
- 21 to 30
- 11 to 20
- 1 to 10

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COUNTRY VICTORIA

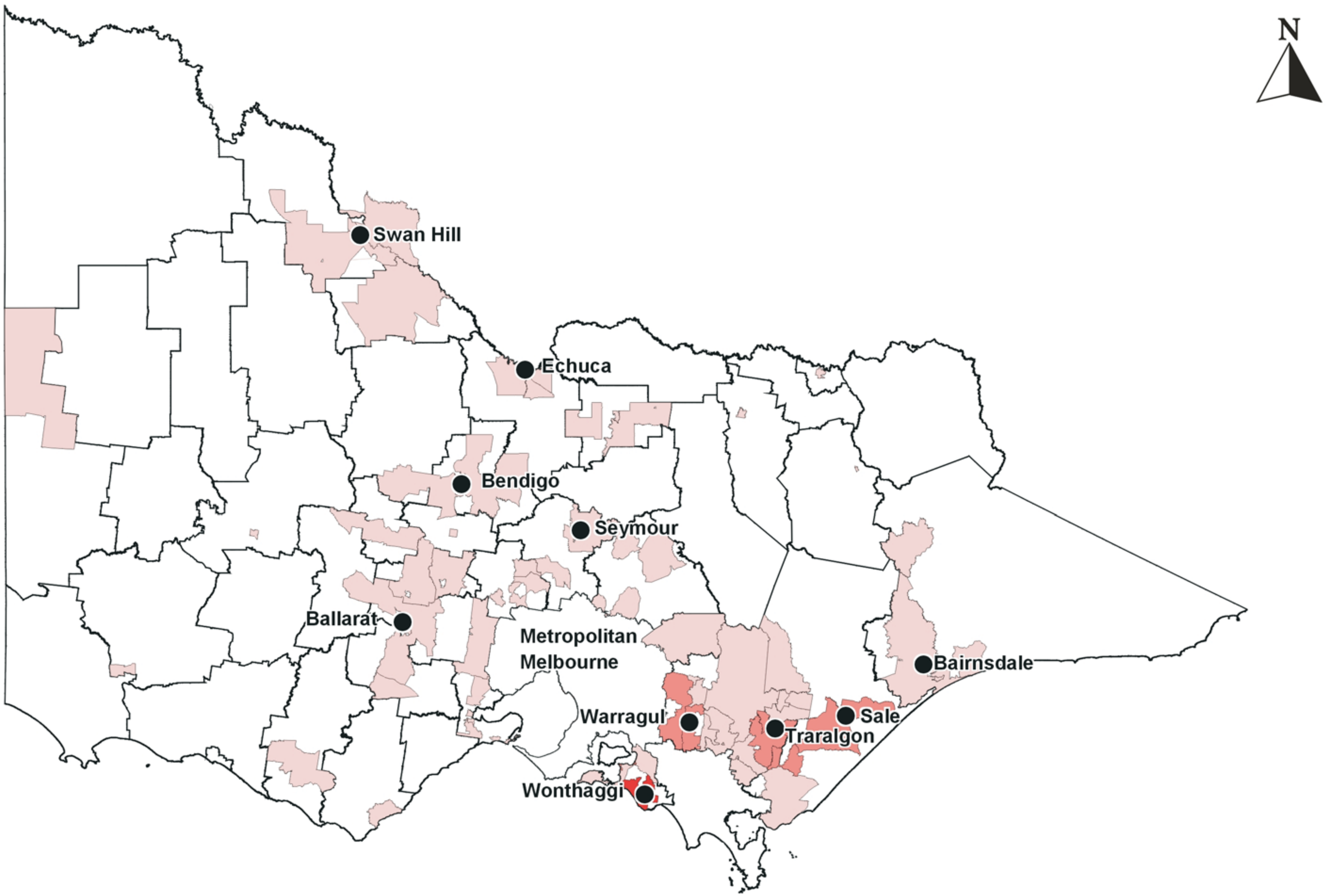
The map on the following page shows the distribution of those holiday homeowners who live in country Victoria.

Owners of holiday homes from country Victoria live predominantly in the Gippsland area. There are also owners who live in the major regional centres of Victoria such as Shepparton, Bendigo and Geelong.

INTERSTATE ORIGIN

Interstate Origin	% of holiday Home Owners living interstate
NSW	1.0%
SA	0.5%
WA	0.5%
Remainder	0.1%
Total	2.1%

Of the 2.1% of holiday homeowners who live interstate, half live in NSW. A further 1% of holiday homeowners live in SA and Qld.



South Gippsland Shire Origin of Holiday Home Owners in

Country Victoria

Number of Holiday Home Owners per Post Code

31+ | 21 to 30 | 11 to 20 | 1 to 10

31-10-03

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Tourism Planners

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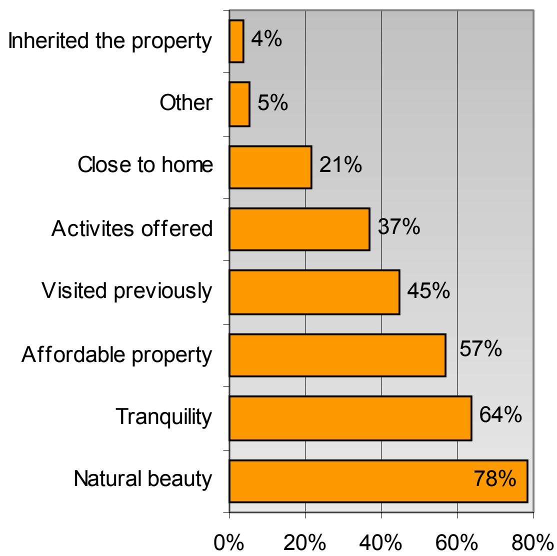
4.6 CHARACTERISTICS OF HOLIDAY HOME OWNERSHIP

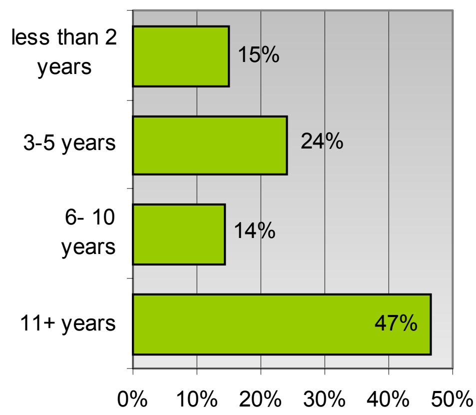
REASON FOR PURCHASE OF HOLIDAY HOME



78% of holiday homeowners purchased in South Gippsland Shire due to the "natural beauty" of the area. A further 64% purchased in the South Gippsland Shire due to the "tranquillity" of the area.

57% of holiday homeowners purchased in the South Gippsland Shire due to "affordable property". A further 45% of holiday homeowners purchased their property having "visited previously".

DURATION OF HOLIDAY HOME OWNERSHIP

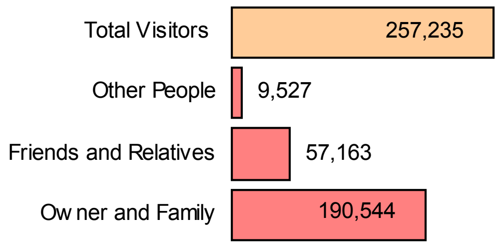


Almost half of the holiday homeowners in the South Gippsland Shire have owned their holiday home for "more than 11 years".

Only 15% of holiday homeowners have owned their property for less than 2 years.

4.7 VISITATION GENERATED BY HOLIDAY HOMES

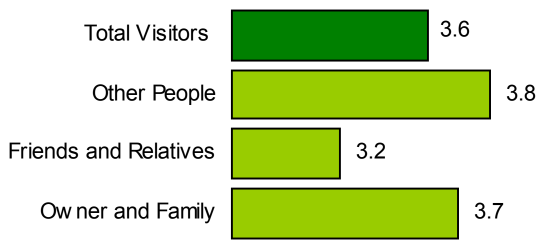
TOTAL VISITATION



There are an estimated 257,235 visitors to holiday homes in the South Gippsland Shire each year.

Owners and their family contributed the majority of visits to holiday homes.

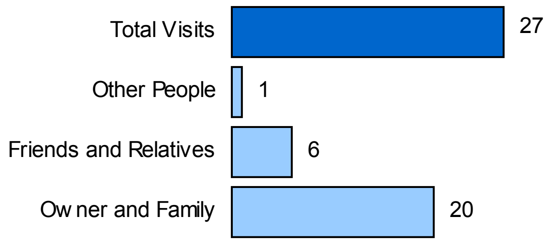
AVERAGE LENGTH OF STAY



The average length of stay for visitors to holiday homes is 3.6 days per visit.

People staying in holiday homes other than owner's family, friends and relatives have the longest average length of stay (3.8 days). These "other people" are essentially short stay tenants.

AVERAGE NUMBER OF VISITS

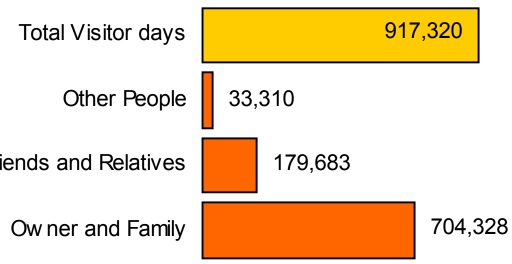


The average number of visits to holiday homes in the South Gippsland Shire is 27 for the year ending May 2003.

AVERAGE NUMBER OF VISITORS PER STAY

The average number of people staying in holiday homes per visit is 3.8.

TOTAL VISITOR DAYS

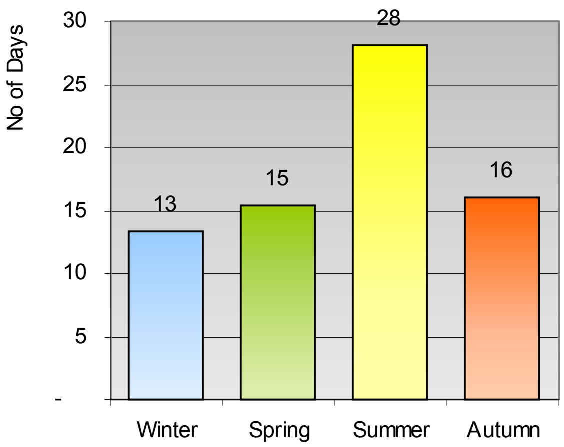


An estimated 917,000 visitor days per year are spent by visitors staying in holiday homes. Owners and their families make up three quarters of those visitor days each year.

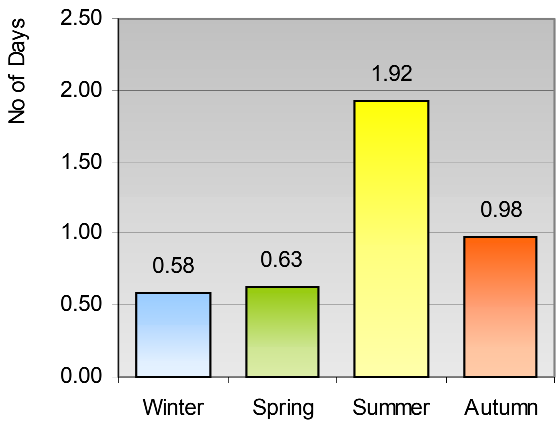
4.8 SEASONAL VISITATION TO HOLIDAY HOMES

DAYS SPENT AT HOLIDAY HOME BY SEASON

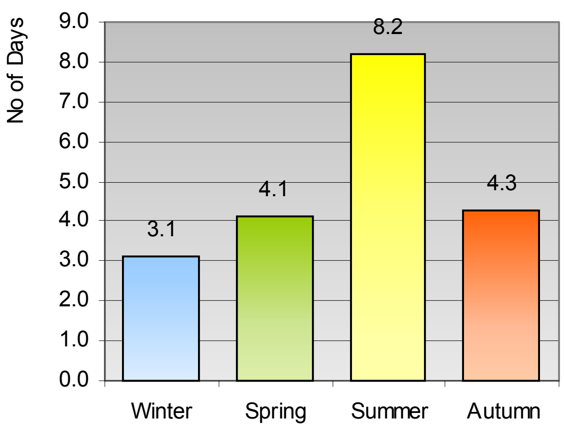
<u>Owner and Family</u>



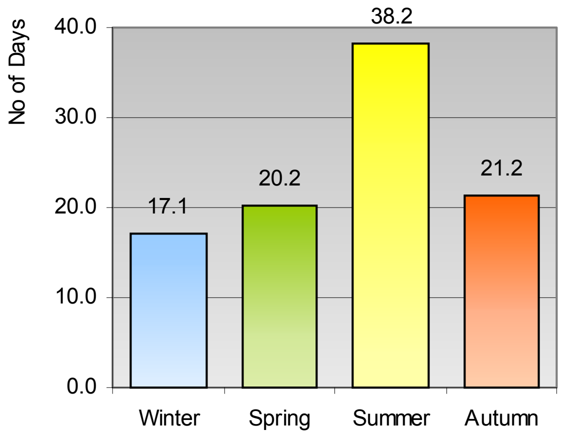
<u>Other Visitors</u>



<u>Friends and Relatives</u>



<u>All Visitors</u>

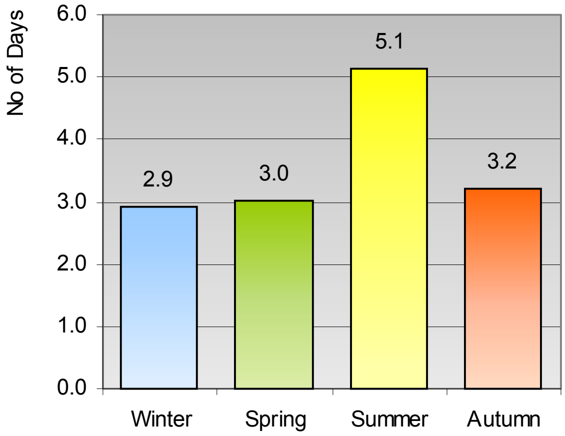


Around one third of visitor days spent in holiday homes are in the summer months.

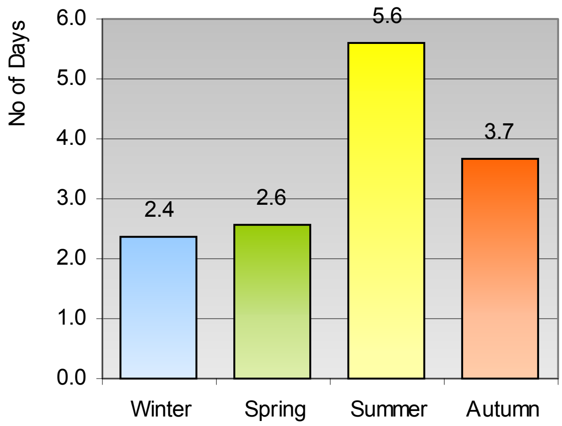
Spring and autumn are the next most popular seasons for visiting.

AVERAGE LENGTH OF STAY BY SEASON

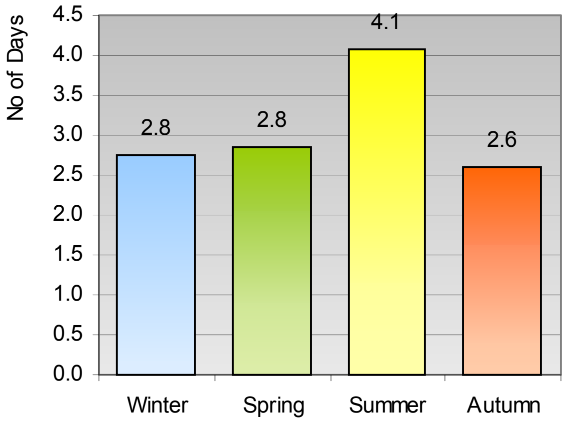
Owner and Family



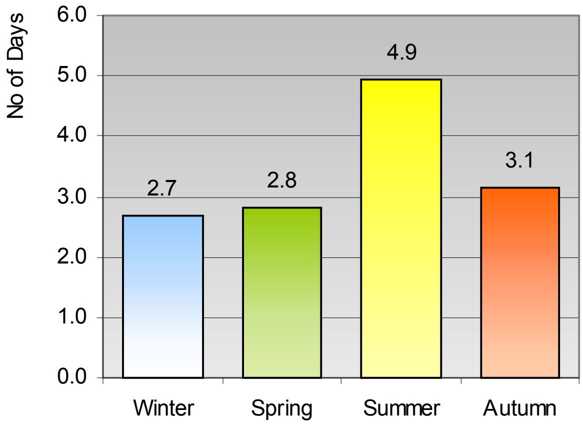
Other Visitors



Friends and Relatives



All Visitors

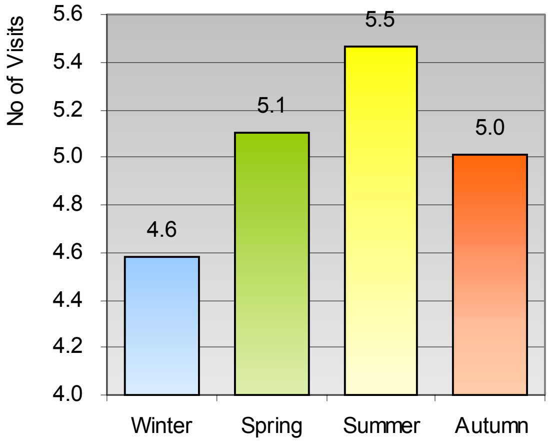


Visitors to holiday homes stayed longest in the summer (an average of 4.9 days per visit). Persons other than the owner's friends, family and relatives stayed on average the longest in summer and autumn.

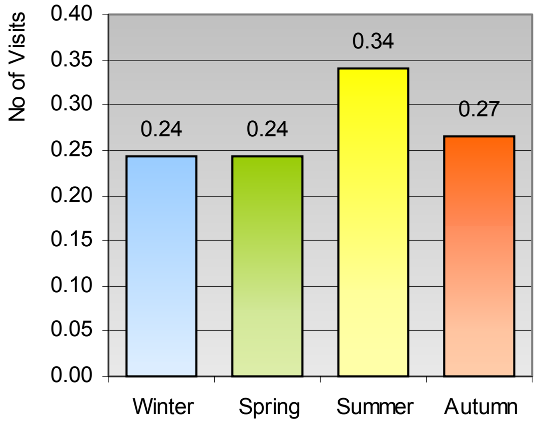
Visitors stayed the shortest periods in the winter.

AVERAGE NUMBER OF VISITS BY SEASON

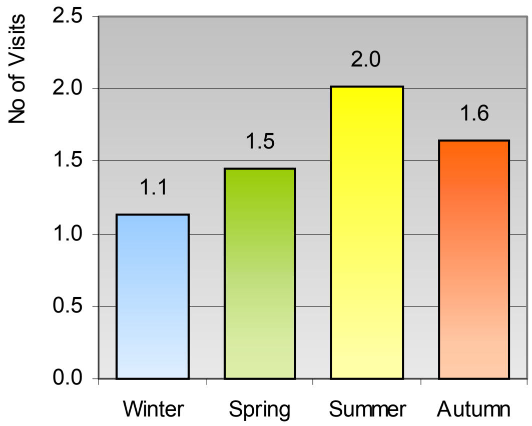
Owner and Family



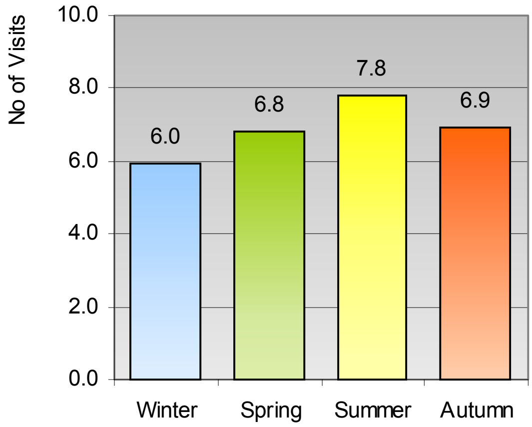
Other Visitors



Friends and Relatives



All Visitors



Holiday homes were visited most in the summer (an average of 7.8 visits per holiday home).

Holiday homes were visited on average only one day less in autumn and spring than the summer. The major difference in visitation lies in the length of stay, with visitors staying significantly longer periods in the summer, compared to the other seasons.

4.9 ACTIVITIES UNDERTAKEN BY VISITORS STAYING IN HOLIDAY HOMES

POPULAR ACTIVITIES UNDERTAKEN

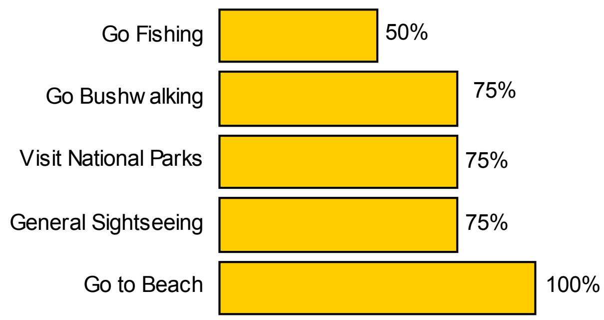
Activity Undertaken	% of visitors
Go to Beach	90%
General Sightseeing	66%
Go Fishing	61%
Visit National Parks	46%
Go Bushwalking	44%
Eat out in Restaurants	44%
Visit Friends and Relatives	36%
Go on Picnics	35%
Go shopping	32%
Go Boating	31%
Attend Festivals and Events	30%

The most popular activity undertaken by visitors staying in holiday homes is "going to the beach" (90%).

Other popular activities undertaken include "general sightseeing" (66%) and "fishing" (61%).

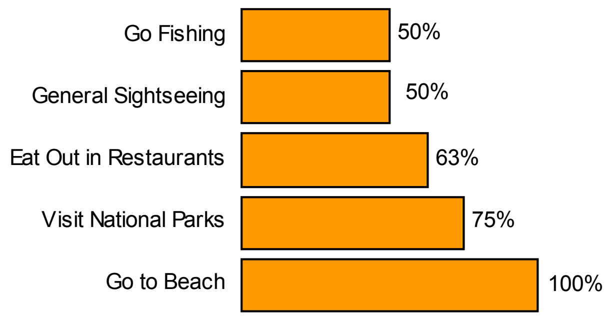
POPULAR ACTIVITIES BY LOCATION

YANAKIE



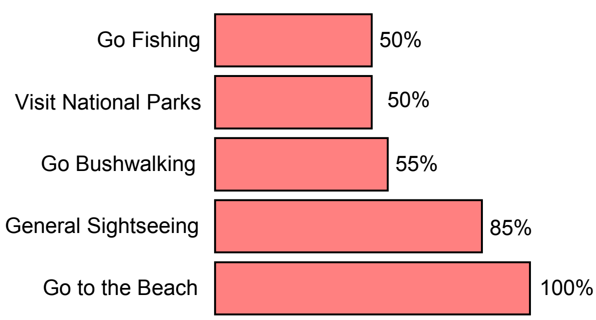
Everyone staying in holiday homes in Yanakie "go to the beach". 75% of people staying in holiday homes in Yanakie "go bushwalking", "visit national parks" and go "general sightseeing".

WARATAH BAY



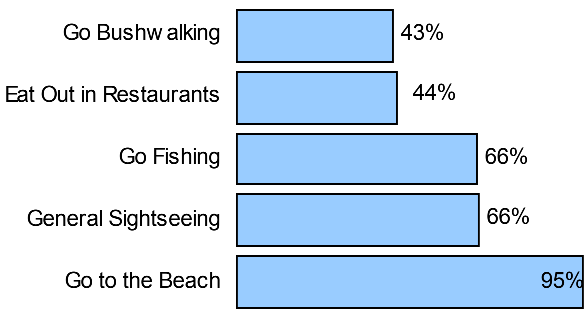
Everyone staying in holiday homes in the Waratah district "go to the beach". A further 75% "visit national parks", and 63% "eat out in restaurants".

WALKERVILLE DISTRICT



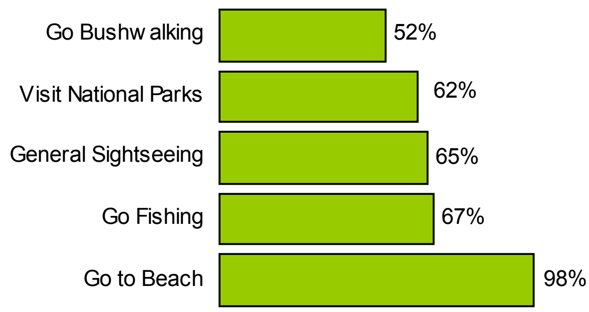
Everyone staying in the Walkerville district "go to the beach". A further 85% of visitors go "general sightseeing".

VENUS BAY



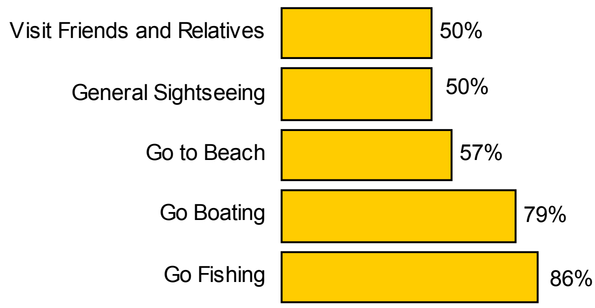
The most popular activity for persons staying in holiday homes in Venus Bay is "going to the beach" (95%). Other popular activities are "fishing" (66%) and "general sightseeing" (66%).

SANDY POINT



"Going to the beach" (98%) is the most popular activity for people staying in holiday homes. "Going fishing" (67%) and "general sightseeing" (65%) are also popular activities.

PORT WELSHPOOL



The most popular activities for people staying in Port Welshpool are "fishing" (86%) and boating (79%). These two activities are more popular than going to the beach (57%).

4.10 EXPENDITURE BY VISITORS STAYING IN HOLIDAY HOMES

TOTAL VISITOR EXPENDITURE

Category of Expenditure	Amount $
Travel and Transport	$17,252,061
Food and Drink	$29,965,424
Shopping	$14,084,318
Entertainment	$7,780,625
Other	$3,145,584
Total	$72,228,012

An estimated $72 million is spent in the South Gippsland Shire by visitors staying in holiday homes.

Visitors staying in holiday homes spend the most on food and drink ($30 million).

AVERAGE SPEND PER VISITOR

Spend Category	Amount $
Travel and Transport	$67
Food and Drink	$116
Shopping	$54
Entertainment	$30
Other	$12
Total	$280

Visitors staying in holiday homes in the South Gippsland Shire spend on average $280 per person per visit.

4.11 EXPENDITURE ON HOLIDAY HOME MAINTENANCE

TOTAL EXPENDITURE

	Expenditure per house
Home Maintenance	$3,956,697
Garden maintenance	$1,211,023
Total	$5,167,721

Over $5 million is spent on holiday home maintenance in the South Gippsland Shire per year.

EXPENDITURE PER HOLIDAY HOME

	Spend per house
Home Maintenance	$1,610
Garden maintenance	$493
Total	$2,102

Holiday homeowners spend on average $2102 on holiday home maintenance per year.

5 Profile of Visitor Accommodation

HIGHLIGHTS

- South Gippsland Shire has 187 visitor accommodation businesses comprising over 1000 rooms and 1400 camping sites.
- Small accommodation businesses dominate the Shire's accommodation stock.
- Accommodation businesses generate over 1 million guest nights per year.
- The average occupancy rate across all accommodation businesses is 38%.
- Takings from accommodation businesses are estimated at $14.3 million per year.
- More than 600 people are employed in accommodation businesses in the Shire.

5.1 KEY FINDINGS

<u>Number and Location of Visitor Accommodation Businesses</u>

- 187 accommodation businesses have been identified in the South Gippsland Shire; these make up 15% of all businesses within the Shire.
- Over half of the accommodation businesses in the Shire are self-contained cottages.
- Accommodation businesses are evenly spread throughout the Shire, with higher concentrations of accommodation businesses in Foster, and Yanakie.
- There are more self-contained accommodation businesses than other accommodation types. The average occupancy rate for Self contained accommodation is relatively low but takings from these businesses are higher than any other accommodation type. This due to higher than average tariffs for self-contained accommodation.
- Cabin accommodation businesses comprise the second highest number of rooms in the Shire and the second highest takings.
- The 18 caravan parks and cabin accommodation establishments in the South Gippsland Shire contain around 1400 camping sites. One third of these camping sites are located in Wilson's Promontory.

Number of Guest Rooms and Bed Spaces

- There are 1034 guest rooms and 1400 camping sites in accommodation businesses in the South Gippsland Shire.
- There are an average of 6 guest rooms per accommodation establishment.
- Self-contained accommodation contained over one quarter of all guest rooms available (301 rooms).
- There are 3227 bed spaces in accommodation businesses in the Shire.

Employment in Visitor Accommodation

- 610 persons are employed in accommodation businesses in the South Gippsland Shire.
- Over half of the employees (56%) of are employed on a part time basis.

Room Nights

- Accommodation businesses in the South Gippsland Shire generate an estimated 145,000 room nights and 190,000 camping site nights per year.
- It is estimated that accommodation businesses generate an average of 774 room nights per year per establishment.

Guest Nights

- Accommodation businesses in the South Gippsland Shire generate an estimated 1 million guest nights per year.
- It is estimated that accommodation businesses generate an average of 1964 guest nights per year per establishment.

Occupancy Rates

- Accommodation businesses in the South Gippsland Shire have an average occupancy rate of 38% per year.
- Cabin accommodation has the highest average occupancy rate of all accommodation types.

Seasonality of Visitation

- 40% of visitors staying in paid accommodation visit the South Gippsland Shire in the March quarter (January – March).

Takings

- Total takings from accommodation businesses are estimated at $14.3 million in takings per year.
- Accommodation businesses take an estimated average of $61,000 per year.
- 70% of accommodation businesses expect an increase in takings over the next financial year.

Capital Investment

- Total capital investment by accommodation businesses in the South Gippsland Shire is estimated at $4.3 million per year.
- Over half of the estimated capital invested in accommodation businesses is spent on new buildings ($2.3 million).

5.2 INTRODUCTION

This section provides an analysis of visitor accommodation in the South Gippsland Shire.

Due to the diverse nature of caravan parks, they are broken into cabins and camping sites in some areas within this section. Accommodation at Wilson's Promontory National Park is included under caravan parks, cabins, and camping sites. It must be noted that Wilson's Promontory makes up a large proportion of both the cabins and camping sites data in this report.

<u>Methodology</u>

Accommodation businesses in the South Gippsland Shire were identified using databases provided by the South Gippsland Shire.

All 187 accommodation businesses identified from the database were sent a survey questionnaire. The survey was designed to collect the following information:

- Type of accommodation
- Persons employed
- Number of rooms and beds
- Room nights
- Occupancy Rate
- Capital investment
- Guest Nights
- Seasonality of visitation
- Takings
- Visitor origin

All information collected related to the financial year 2002-2003.

70 completed responses were received from accommodation businesses. Results were extrapolated for missing values to calculate room nights, guest nights, occupancy rates and takings.

The following formula was used for extrapolation:

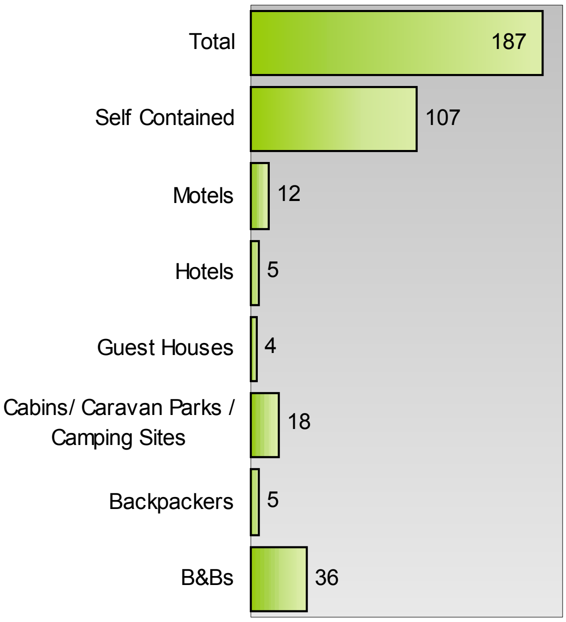
Averages for completed surveys	**X**	**Total accommodation in database**	**=**	**Total number**

Using the 95% confidence interval, the margin for error for the survey is calculated below 10%. This means that we can be 95% confident that the actual results in the report are within 10% of the results shown.

This is an acceptable error margin for the purposes of this study.

5.3 NUMBER AND LOCATION OF VISITOR ACCOMMODATION BUSINESSES

NUMBER OF BUSINESSES



There are 187 accommodation businesses identified in the South Gippsland Shire.

Over half of the accommodation is classified as “self contained” (107 businesses).

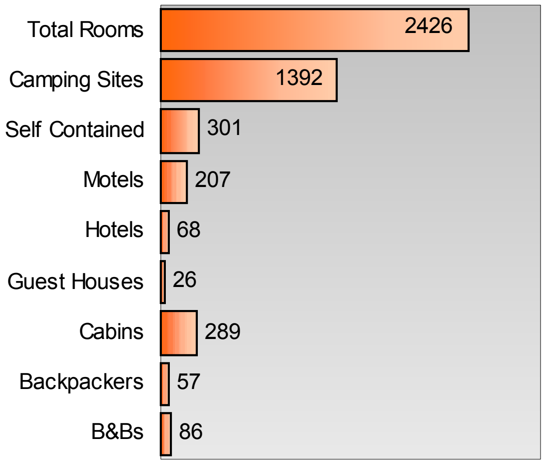
LOCATION OF ACCOMMODATION BUSINESSES

Locality	% of Total
Other Towns (below 1%)	32%
Foster	14%
Yanakie	12%
Walkerville	6%
Leongatha	4%
Fish Creek	4%
Korumburra	4%
Toora	3%
Sandy Point	3%
Mirboo North	3%
Meeniyan	3%
Waratah Nth	2%
Waratah Bay	2%
Tarwin Lower	2%
Welshpool	2%
Venus Bay	2%

Accommodation businesses are evenly spread throughout the Shire, with higher concentrations of accommodation businesses in Foster, and Yanakie.

5.4 NUMBER OF GUEST ROOMS/ CAMPING SITES

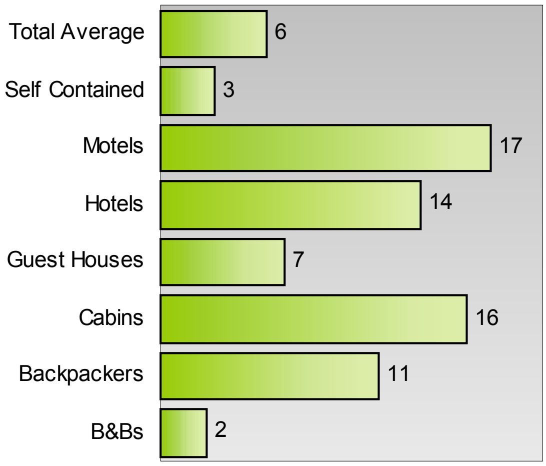
TOTAL ROOMS AND CAMPING SITES



There are 1034 guest rooms in accommodation businesses in the South Gippsland Shire. There are a further 1392 camping sites in caravan parks. Around 40% of all camping sites are located in Wilson's Promontory.

Self-contained accommodation has the most guest rooms available (301 rooms), this is followed by cabin accommodation (289 rooms). 38% of cabin guest rooms are located in Wilson's Promontory.

AVERAGE NUMBER OF ROOMS BY TYPE



The average number of rooms per accommodation establishment is 6.

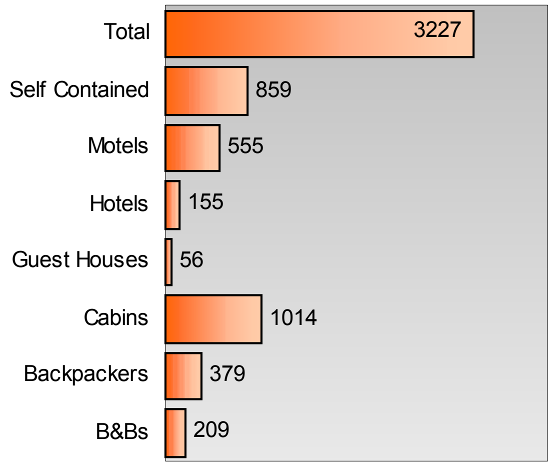
Motels had the largest average number of rooms per establishment (17 rooms), followed by cabins (16 rooms).

Bed and Breakfast accommodation had the least number of rooms per establishment (2 rooms).

#Note: Data not available for camping sites.

5.5 NUMBER OF BED SPACES

TOTAL BED SPACES



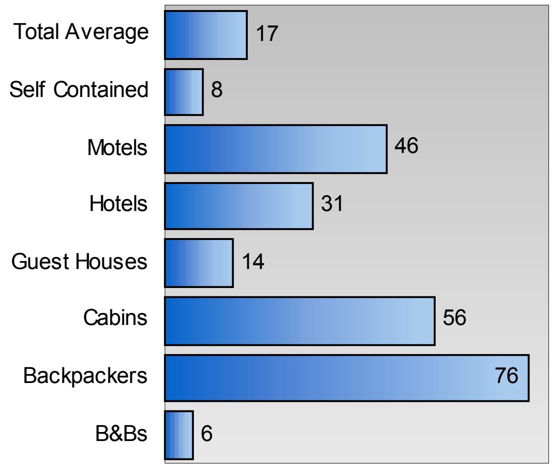
There are 3227 bed spaces in accommodation businesses in the South Gippsland Shire.

Cabin accommodation contained the most bed spaces (1014). 55% of cabin accommodation bed spaces are located in Wilsons Promontory.

self-contained accommodation contains 859 bed spaces.

Note: Data not applicable for camping sites.

AVERAGE BED SPACES PER BUSINESS



The average number of bed spaces per business is 8.

Backpacker accommodation has the largest number of bed spaces per business (76 bed spaces). This figure includes a number of large camps, which have been classified as backpacker accommodation, however are used mainly by school groups and clubs.

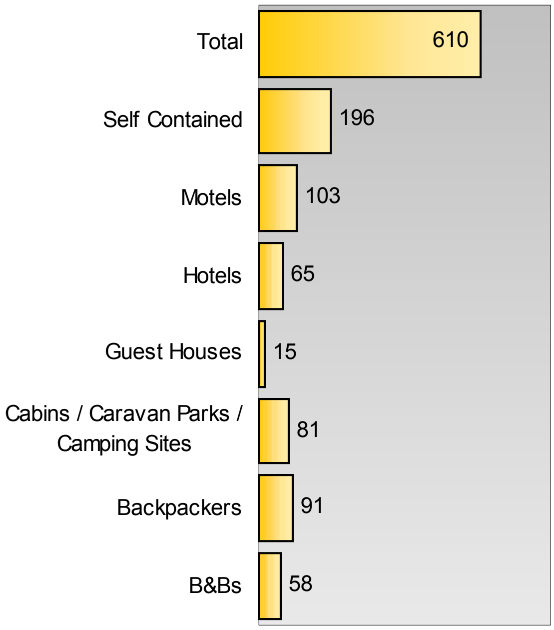
Cabin accommodation establishments have an average of 56 bed spaces per establishment; this average is skewed due to the high number of bed spaces located in Wilson's Promontory.

Bed and Breakfast accommodation has the least bed spaces per business (6 bed spaces).

#Note: Data not applicable for camping sites.

5.6 EMPLOYMENT

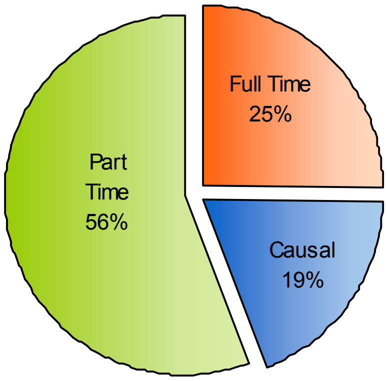
TOTAL NUMBER OF PERSONS EMPLOYED BY SECTOR



There are 610 persons employed in accommodation businesses in the South Gippsland Shire.

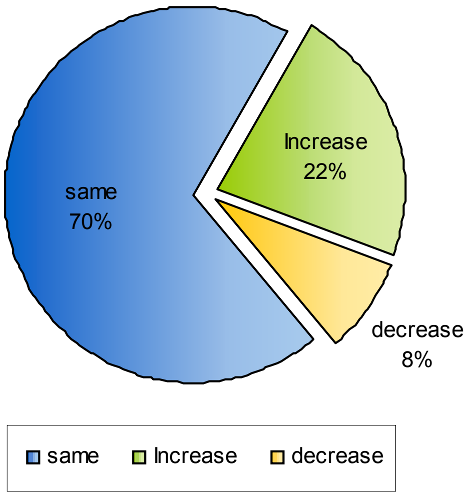
Self-contained accommodation employed the most persons (196), followed by motels (103). Employment numbers include casual workers.

TYPE OF EMPLOYMENT



56% of persons employed in accommodation businesses were employed on a part time basis. Only 25% of persons are employed full-time.

FUTURE EMPLOYMENT INTENTIONS

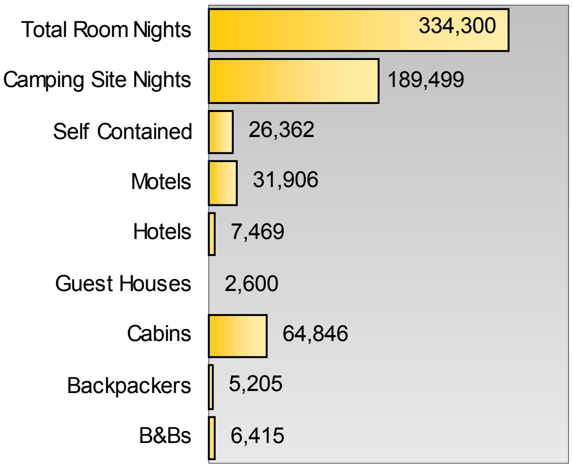


70% of accommodation businesses predicted no change in employment in the next financial year.

22% of accommodation businesses predicted an increase in employment.

5.7 ROOM AND CAMPING SITES NIGHTS

TOTAL ROOM AND CAMPING SITE NIGHTS

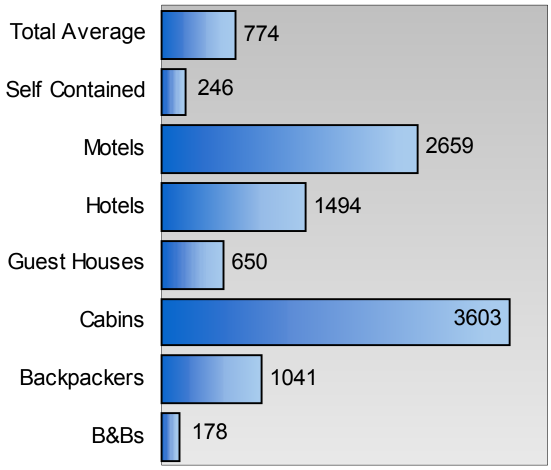


Accommodation businesses in the South Gippsland Shire have an estimated 145,000 rooms nights per year. Camping Sites have an estimated 189,499 site nights per year.

Cabin accommodation businesses have the most room nights of all room based accommodation types (almost 65,000).

Although self-contained accommodation makes up over half of all accommodation businesses in the Shire, they contribute only 26,362 room nights to the Shire.

AVERAGE ROOM NIGHTS



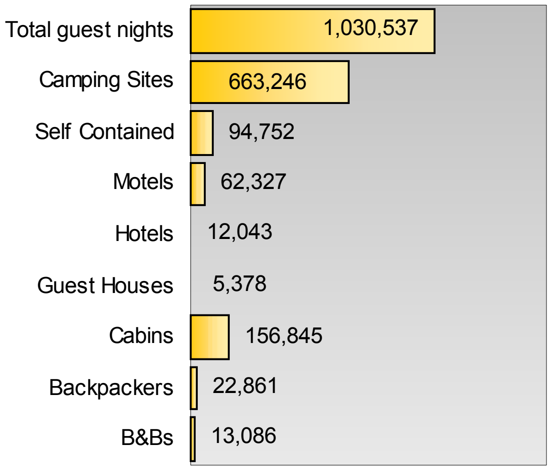
Accommodation businesses have an average of 774 room nights per year per establishment.

Cabin accommodation businesses have the highest estimated average room nights per establishment (3603 room nights).

Note: Data not applicable for camping sites.

5.8 GUEST NIGHTS

TOTAL GUEST NIGHTS

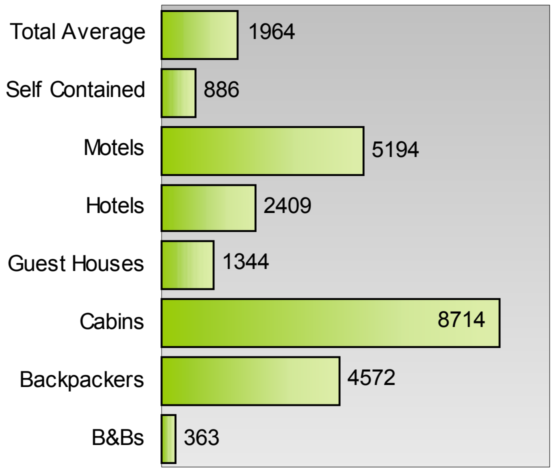


Accommodation businesses in the South Gippsland Shire have over 1 million guest nights per year.

Camping Sites make up two thirds of all guest nights.

A further 157, 000 guest nights occur in cabin accommodation.

AVERAGE GUEST NIGHTS



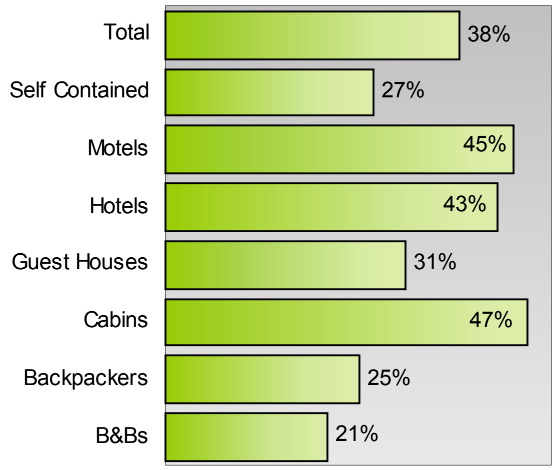
Accommodation businesses have an average of 1964 guest nights per year per establishment. (Excluding camping sites).

Cabin accommodation businesses have the highest average number of guest nights per year per establishment (8714 guest nights).

Note: Data not available for camping sites.

5.9 OCCUPANCY RATE AND LENGTH OF STAY

OCCUPANCY RATE



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Accommodation businesses in the South Gippsland Shire have an average occupancy rate of 38%.

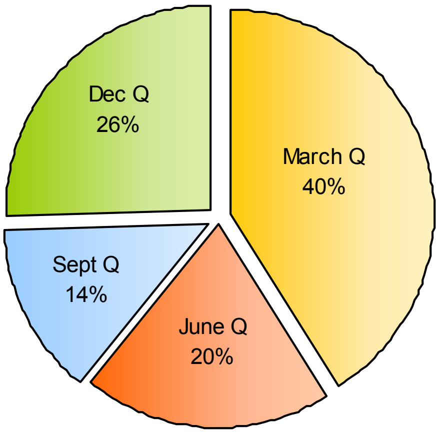
Cabin accommodation has the highest occupancy rate, an average of 47% per business, (the average occupancy rate includes Wilson's Promontory).

Bed and breakfast accommodation has the lowest occupancy rates of all accommodation types. The surveys suggested that many bed and breakfast businesses and self contained cottages operated as "part time" businesses.

Note: Data not available for camping sites

5.10 SEASONALITY OF VISITATION IN ACCOMMODATION

ALL VISITS

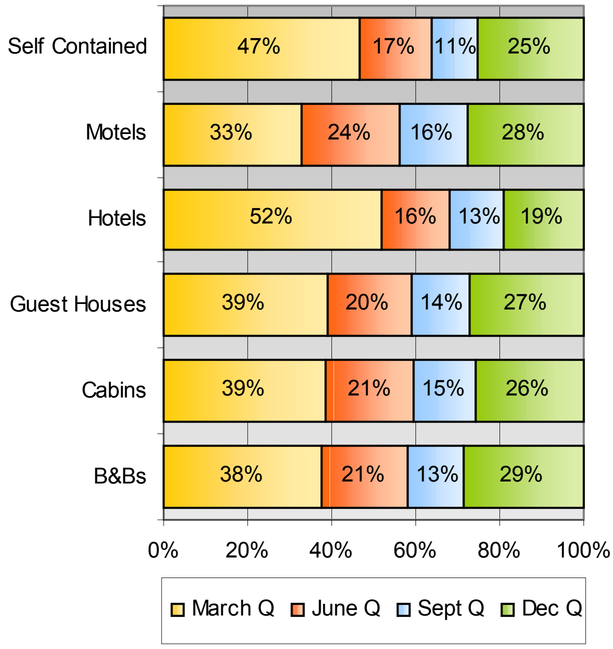


40% of accommodation guests staying in paid accommodation visit the South Gippsland Shire in the March quarter.

Only 14% of stays in paid accommodation occur in the September quarter.

Note: Data not available for camping sites.

SEASONALITY BY TYPE OF ACCOMMODATION



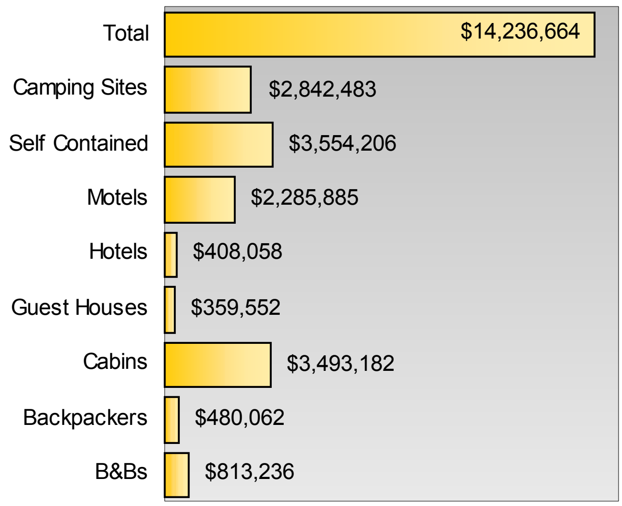
Over half of the stays in Hotel accommodation by guests occur in the March quarter.

Motels have the most even spread of visitation throughout the year of all accommodation types.

Note: Data not available for camping sites.

5.11 TAKINGS

TOTAL TAKINGS

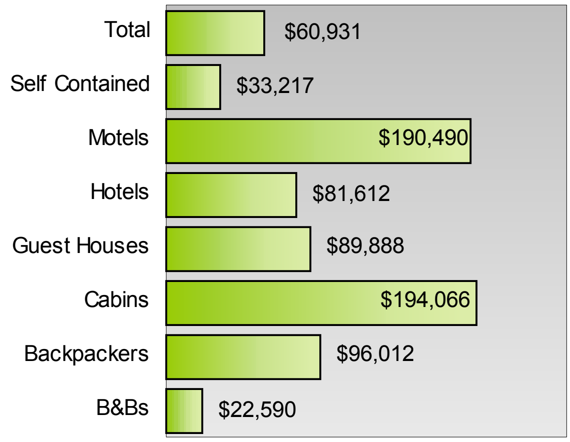


Accommodation businesses take an estimated $14.2 million in takings per year.

Self-contained accommodation has the highest takings of all accommodation types (over $3.5 million per year). This is followed by cabin accommodation (over $3.4 million per year).

Note: The takings data presented above represents commercial takings for accommodation establishments in the South Gippsland Shire. The takings associated with holiday home rentals are not included.

AVERAGE TAKINGS

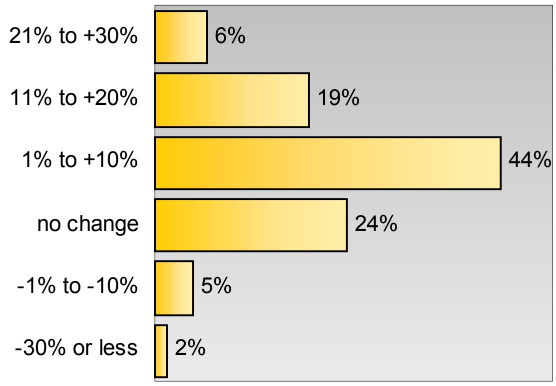


Accommodation businesses on average generate an estimated income of $61,000 per business per year.

Cabin accommodation has the highest takings, with $194,000 per business per year. This is followed by motel accommodation ($190,500 per business per year).

Note: Not available for camping sites

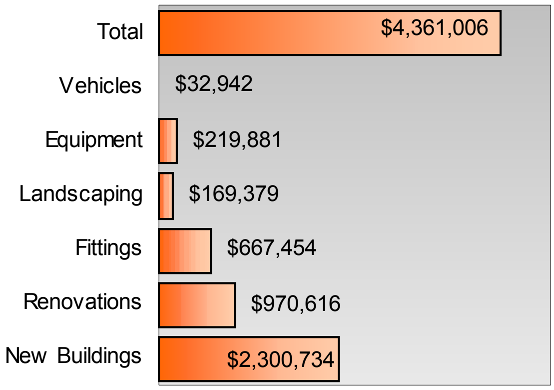
EXPECTED FUTURE TAKINGS



70% of accommodation businesses predict an increase in takings in the next financial year, with 25% expected an increase of more than 10%

5.12 CAPITAL INVESTMENT IN ACCOMMODATION

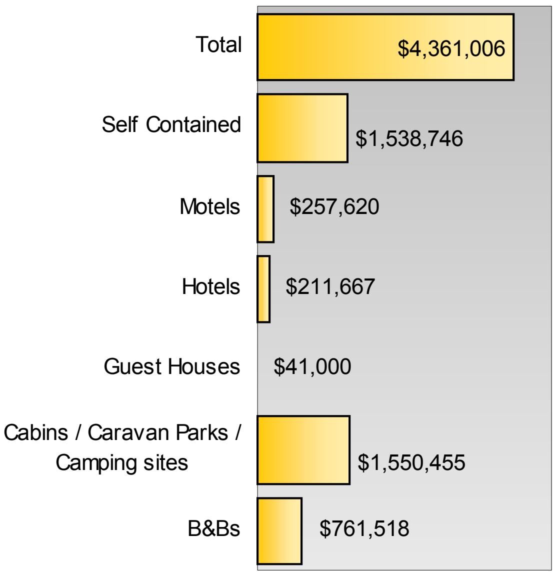
TYPE OF CAPITAL INVESTMENT



It is estimated that accommodation businesses in the South Gippsland Shire invest over $4 million in capital each year.

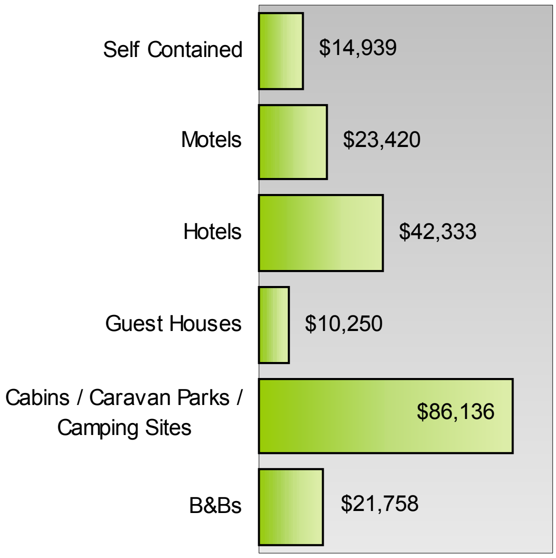
Over half of the capital invested in accommodation businesses is spent on new buildings ($2.3 million).

TOTAL CAPITAL INVESTMENT BY TYPE OF ACCOMMODATION



Most capital investment occurs in self-contained and cabin accommodation businesses ($1.5 million).

AVERAGE CAPITAL INVESTMENT BY TYPE OF ACCOMMODATION



Cabin accommodation businesses recorded the highest capital investment per business ($86,000 per year).

6 Profile of Specialised Tourism Businesses

HIGHLIGHTS

- South Gippsland Shire has 72 specialised tourism businesses (other than accommodation) employing 591 persons.
- Specialised tourism businesses invested $1.7 million in capital improvements in the year 2002-2003.
- Two thirds of specialised tourism businesses reported an increase in gross business income in the year 2002-2003
- 83% of specialised tourism businesses are expecting a further increase in gross business income in the year 2003 - 2004.

6.1 KEY FINDINGS

Number and Location of Tourism Businesses

- 72 tourism businesses have been identified in the South Gippsland Shire.
- Specialised tourism businesses make up 9% of all businesses in the Shire.
- Almost half of specialised tourism businesses were food retailers /producers.
- Specialised tourism businesses are evenly spread throughout the Shire, with a concentration of businesses in Foster.

Employment in Tourism Businesses

- 591 persons are employed in specialised tourism businesses in the South Gippsland Shire.
- Over half of the employees (52%) are employed on a casual basis.

Capital Investment

- Total capital investment by specialised tourism businesses in the South Gippsland Shire is estimated at $1.7 million in the financial year 2002-2003.

- Over one third of capital investment by specialised tourism businesses is spent on equipment.
- Specialised tourism businesses expect to invest an estimated $1.1 million in the financial year 2003-2004.

Business Income

- Two thirds of specialised tourism businesses reported an increase in gross business income in the financial year 2002-2003.
- 83% of specialised tourism businesses predict an increase in gross businesses income in the financial year 2003-2004.

6.2 INTRODUCTION

This section provides an analysis of specialised tourism businesses in the South Gippsland Shire, other than accommodation businesses. It is assumed these businesses receive close to 100% of their income from visitors to the Shire.

Methodology

Tourism businesses were identified using databases provided by the South Gippsland Shire.

96 tourism businesses were sent a survey, which collected the following information:

- Type of business;
- Persons employed;
- Capital investment;
- Performance of business.

Current information collected related to the financial year 2002-2003, and forecasts for the financial year 2003-2004.

Arising from the survey, 24 businesses were excluded from further consideration for the following reasons:

- Tourism is not their core business,
- The business is based outside the South Gippsland Shire boundary,
- The business is a volunteer organisation or does not gain financially from visitors.

Of the remaining 72 businesses, those that did not return the survey were contacted by telephone.

72 businesses were deemed to be specialised tourism businesses, which received the majority of their turnover from visitors to the Shire. The data in this section relates to these 72 specialised tourism businesses, which have been categorised as follows:

Business Category	Type of Business
Attractions	Includes historic sites, cinemas, museums, national parks
Antiques / Galleries / Art & Craft	Includes shops selling antiques and collectibles, bookshops, art galleries and studios, and craft shops
Golf	Includes golf courses, driving ranges and golf complexes. Does not include mini-golf
Restaurants[13]	Includes restaurants, pubs, cafes and taverns
Tours & Activities	Includes boat charter cruises, ferries and passenger services, trail rides, fishing charters and dive tours
Wineries	Includes wineries and vineyards. Businesses in this category may also have accommodation and eating facilities, however their core business is winemaking or grape growing)
Specialised Food Producers and Retailers	Includes food producers and retailers who sell their products locally with and emphasis on marketing to the visitors
Other	Any businesses, which do not fit into the categories above, this includes horseracing clubs/events.

43 completed responses were received from tourism businesses. The businesses that did not respond could not be contacted, were not interested or were too busy to complete the survey.

Results were extrapolated for missing values to calculate total employment and capital investment.

The following formula was used for extrapolation:

Averages for completed surveys **X** **Total specialised tourism businesses in database** **=** **Total number**

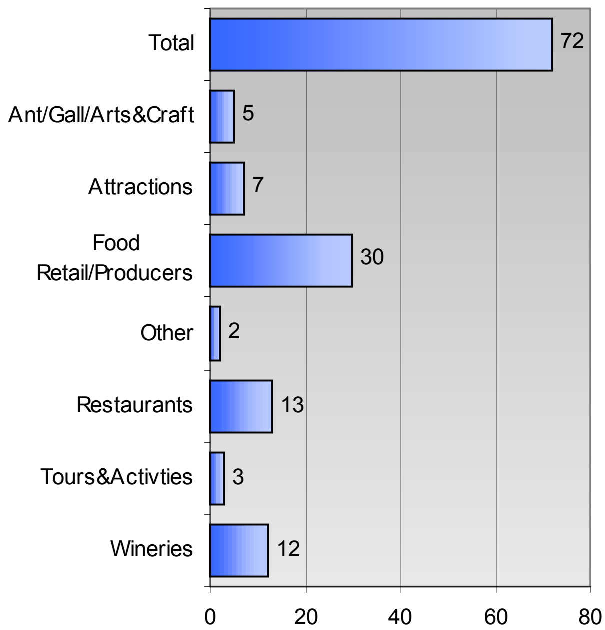
Using the 95% confidence interval, the margin for error for the survey is calculated at less than 10%. This means that we can be 95% confident that the actual results from this survey are within 10% of the results shown.

This is an acceptable error margin for the purposes of this study.

[13] This included only some of the restaurants in the Shire, which are members of Prom Country Tourism; the other restaurants cafes are included in section 9.

6.3 NUMBER AND LOCATION OF SPECIALISED TOURISM BUSINESSES

NUMBER OF SPECIALISED TOURISM BUSINESSES



There are 72 specialised tourism businesses identified in the South Gippsland Shire.

Almost half of the specialised tourism businesses are classified as "food retail/producers" (30 businesses).

LOCATION OF SPECIALISED TOURISM BUSINESSES

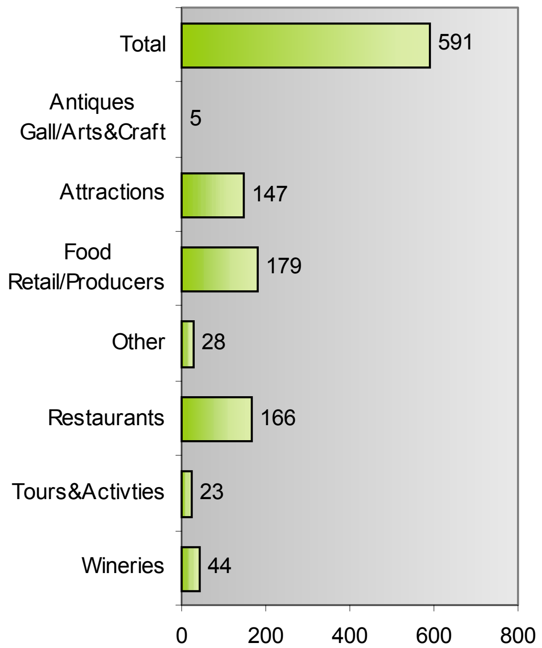
Location	% of Total
Foster	17%
Leongatha	10%
Mirboo North	8%
Fish Creek	7%
Koonwarra	6%
Korumburra	4%
Other	49%
Total	100%

The highest concentration of specialised tourism businesses is in Foster (17%).

Specialised tourism businesses are spread consistently throughout thirty localities in the Shire. (The "other" category includes 25 separate localities).

6.4 EMPLOYMENT

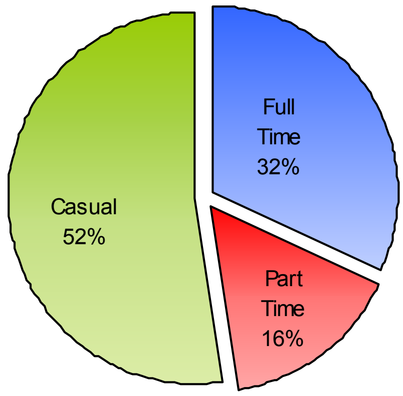
TOTAL NUMBER OF PERSONS EMPLOYED PER SECOR



There are 591 persons employed in specialised tourism businesses in the South Gippsland Shire. Employment numbers include causal staff.

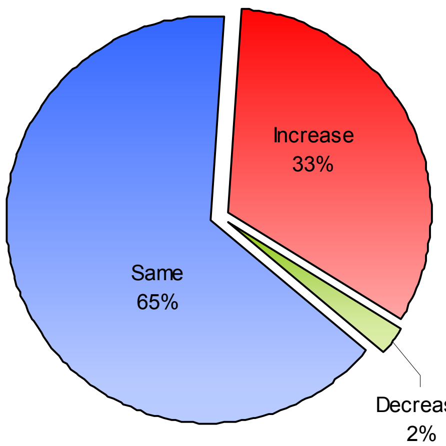
"Food retail/producers" employed the most persons (179), followed by "restaurants" (166).

TYPE OF EMPLOYMENT



52% of persons employed in specialised tourism businesses were employed on a casual basis. 32% of persons are employed full-time.

FUTURE EMPLOYMENT INTENTIONS (2003-2004)

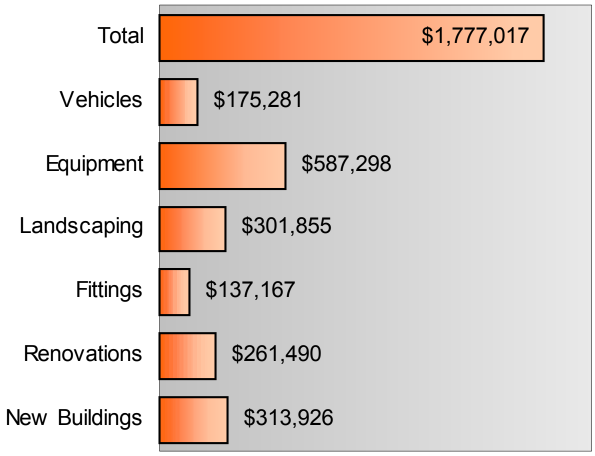


65% of specialised tourism businesses predicted no change in employment in the next financial year.

33% of specialised tourism businesses predicted an increase in employment.

6.5 CAPITAL INVESTMENT

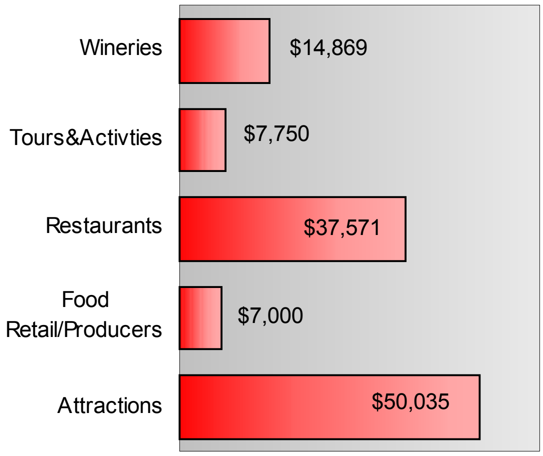
TYPE OF CAPITAL INVESTMENT



It is estimated that specialised tourism businesses in the South Gippsland Shire invested over $1.7 million in capital in the financial year 2002-2003.

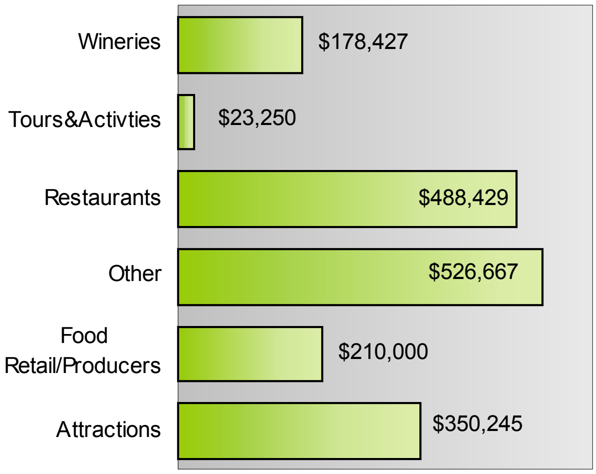
Tourism businesses invested most capital in "equipment".

AVERAGE CAPITAL INVESTMENT BY SPECIALISED TOURISM BUSINESSES



Attractions businesses reported the highest capital investment of all specialised tourism businesses; $50,000 per business.

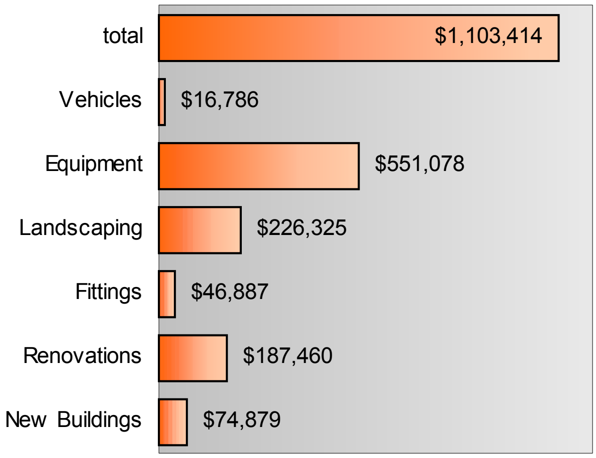
TOTAL CAPITAL INVESTMENT BY TYPE OF TOURISM BUSINESS



Restaurants in the South Gippsland Shire invested almost $500,000 in capital in the financial year 2002-2003.

6.6 FUTURE CAPITAL INVESTMENT 2003-2004

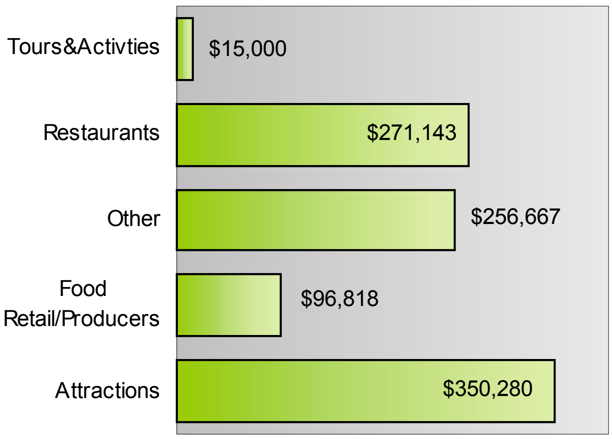
TYPE OF CAPITAL INVESTMENT



Specialised tourism businesses in the South Gippsland Shire intend to invest over $1.1 million in capital in the financial year 2003-2004.

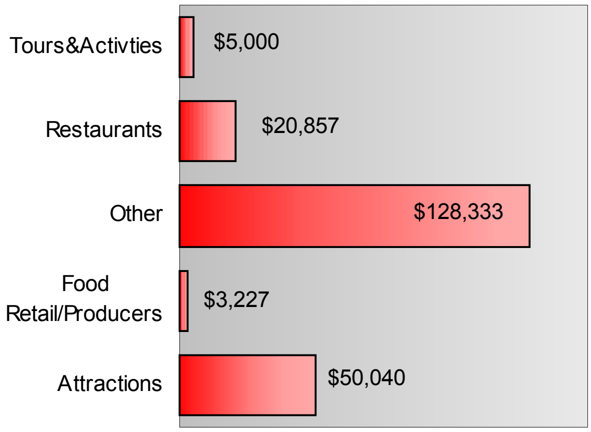
Specialised tourism businesses intend to invest the most capital in "equipment". (Over $500,000)

TOTAL CAPITAL INVESTMENT BY TYPE OF TOURISM BUSINESSES



"Attractions" in the South Gippsland Shire intend to invest $350,000 in capital in the financial year 2003-2004.

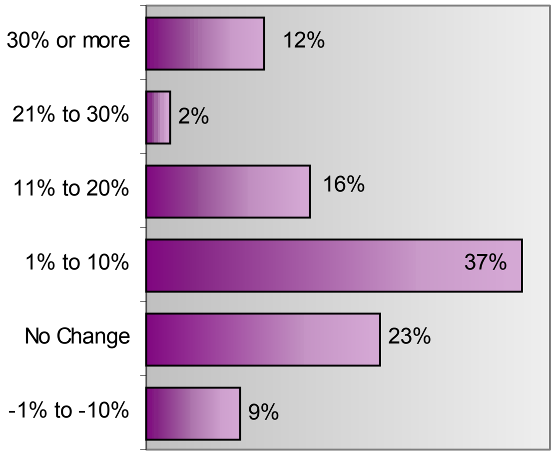
AVERAGE CAPITAL INVESTMENT BY TYPE OF TOURISM BUSINESS



"Other" specialised tourism businesses intend to invest the highest amount of capital per business in the financial year 2003-2004.

6.7 BUSINESS INCOME

CHANGE IN BUSINESS INCOME 2002-2003

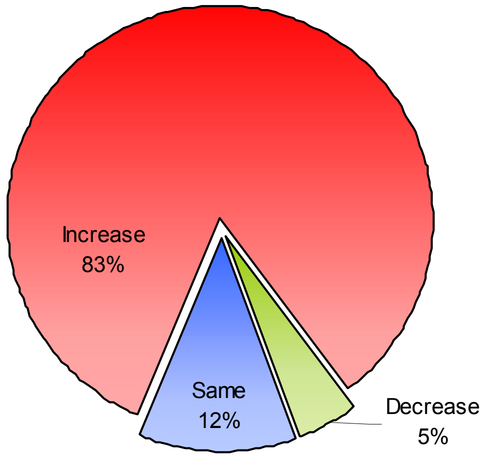


Over two thirds of specialised tourism businesses reported an increase in gross business income in the financial year 2002-2003.

A further 23% of specialised tourism businesses reported no change in gross business income in the financial year 2002-2003.

9% of tourism businesses reported a decrease in gross business income.

PREDICTED FUTURE INCOME 2003-2004



83% of specialised tourism businesses predict an increase in gross business income in the financial year 2003-2004.

7 Profile of Other Businesses That Benefit From Tourism

HIGHLIGHTS

- South Gippsland Shire has 416 businesses (other than specialised tourism and accommodation businesses) that benefit from visitors to the Shire. These businesses employ an estimated 2341 persons.
- These businesses invested an estimated $9.8 million in capital improvements to their business in the year 2002-2003. These businesses expect to invest a further $18 million in capital in the year 2003-2004.
- 58% of these businesses reported an increase in gross business income in the year 2002-2003
- 57% of these businesses are expecting a further increase in gross business income in the year 2003-2004.

7.1 KEY FINDINGS

Number and Location of Businesses

- 416 businesses (other than specialised tourism and accommodation businesses) that also benefit from visitation to the Shire make up 35% of all businesses in the Shire.
- One third of these businesses are located in Leongatha. The remainder are distributed evenly throughout he Shire.

Proportion of Business Turnover Generated by Visitors to the Shire

- For these other businesses 22% of their business income is generated by visitation to the Shire.
- 32% of business income in the summer months is generated by visitation to the Shire.
- Visitors contributed over half of the business turnover for recreational goods retailers.

Employment

- 2341 persons are employed in these businesses.
- Almost half of the employees (49%) are employed full time.

Capital Investment

- Total capital investment by these businesses, is estimated at almost $10 million in the financial year 2002-2003.
- Businesses invested most capital on vehicles ($2.7 million) and new buildings ($2.2 million).
- Other businesses, which benefit from visitors to the Shire expect to invest an estimated $18 million in the financial year 2003-2004, half of which is expected to be spent on buildings.

Business Performance

- 58% of these businesses reported an increase in gross business income in the financial year 2002-2003.
- 57% of these businesses predict an increase in gross businesses income in the financial year 2003-2004.

7.2 INTRODUCTION

This section provides an analysis of all businesses in the South Gippsland Shire that are likely to benefit from visitation to the Shire.

Methodology

Businesses that are likely to benefit from visitors were identified using databases provided by the South Gippsland Shire Council.

416 relevant businesses were identified from over 1200 that were listed in the databases. The 416 relevant businesses were categorised using the Australian and New Zealand Standard Industrial Classifications (ANZIC). The table below shows the business categories that are deemed to benefit from visitors to the Shire.

Business Category	Type of Business
Supermarket and Grocery Stores	Includes supermarket or general stores, which sell many varieties of food and non-specific products.
Specialised Food Retailing	Includes fresh meat, fish, poultry retailing, (butcher shops), fruit and vegetable shops, liquor and alcohol, (bottle shops), bread and cake retailers (bakeries), takeaway food retailers (takeaway fish and chips, pizza, sandwich bar, hamburgers, cooked chickens.
Department Store	Kmart, Target, Myer etc.
Clothing and Soft Good Retailing	Includes retail stores, which specialise in clothing and/or footwear, and fabric retailers.
Restaurants[14]	Includes restaurants, pubs, and cafes.
Furniture, Houseware and Appliance Retailing	Includes furniture retailers, floor-covering retailers, e.g. carpets, domestic hardware and houseware retailers, domestic appliance retailing, e.g.: air conditioners, fridges etc, and music retailers.
Recreational Good Retailing	Sport and camping equipment, toy and game retailers, newsagents, and stationary retailers, photo shops, marine equipment retailing, e.g. fishing etc.
Other Personal and Household Retailing and Services	Pharmaceutical, cosmetic and toiletry retailers, Antique and used goods, garden supplies, flower retailing, watch and jewellery retailing, household equipment repair services, video hire, laundries, photographic film processing, gardening and other household maintenance services
Motor Vehicle Retailing	Car retailing, trailer and caravan retailing, petrol stations, mechanics, smash repairs, tyre retailing.
Property Services	Real estate agents, motor vehicles hire.
Tourism Related	Businesses whose core income is from tourism and are members of the Prom Country Tourism Association, they include: attractions, antiques/galleries/art & craft, golf, restaurants, tours and activities, wineries, specialised food producers and retailers, these businesses are included in the tourism business component of this report.

[14] This includes most cafes/restaurants. Some are categorised under specialised tourism businesses in section 8.

All 416 relevant businesses were sent a survey questionnaire. The survey was designed to collect the following information:

- Type of business;
- Persons employed;
- Capital investment;
- Performance of business;
- Proportion of customers who were visitors to the local area.

Information collected related to the financial year 2002-2003, and forecasts related to the financial year 2003-2004.

111 completed responses were received. Results were extrapolated for missing values to calculate total employment and capital investment.

The following formula was used for extrapolation:

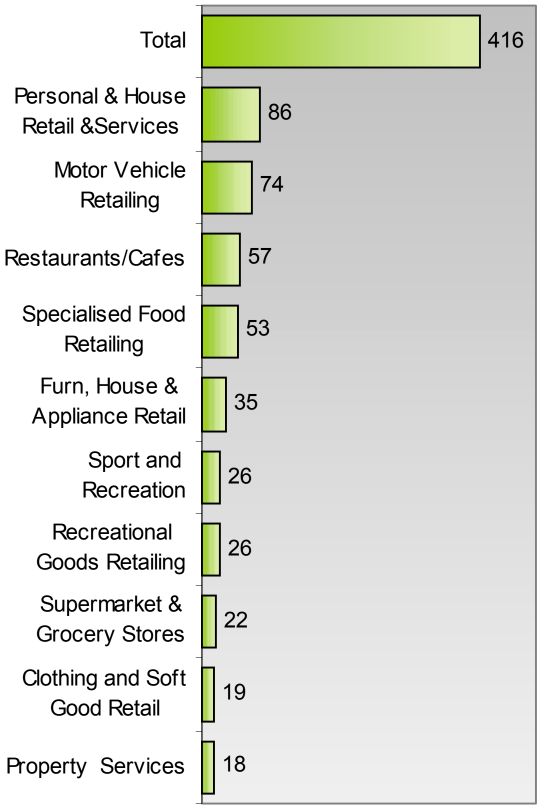
Averages for completed surveys	**X**	**Total businesses in database**	**=**	**Total number**

Using the 95% confidence interval, the margin for error for the survey is calculated at less than 8%. This means that we can be 95% confident that the actual results in the report are within 8% of the results shown.

This is an acceptable error margin for the purposes of this study.

7.3 NUMBER AND LOCATION OF BUSINESSES

NUMBER OF BUSINESSES



There are 416 businesses identified in the South Gippsland Shire that are likely to benefit from tourist visitation.

The largest proportion of businesses are categorised as "personal, household retail and services".

LOCATION OF BUSINESSES

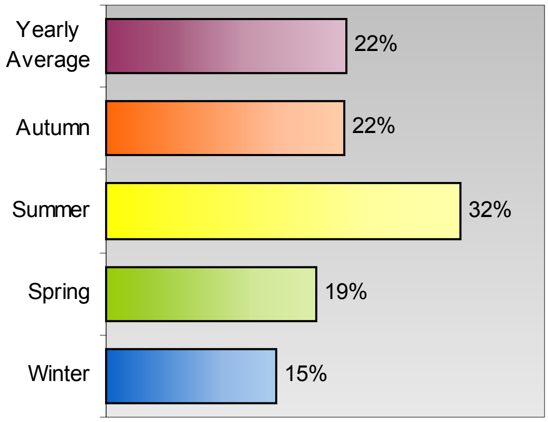
Location	Number of businesses	% of total
Leongatha	136	33%
Korumburra	72	17%
Other	72	17%
Foster	46	11%
Mirboo North	30	7%
Meeniyan	23	6%
Tarwin Lower	13	3%
Loch	12	3%
Toora	12	3%
Total	416	100%

The highest concentrations of businesses that benefit from visitors to the Shire are in Leongatha (33%), followed by Korumburra (17%).

The remaining businesses are spread consistently throughout the Shire.

7.4 PROPORTION OF BUSINESS TURNOVER GENERATED BY VISITORS TO THE SHIRE

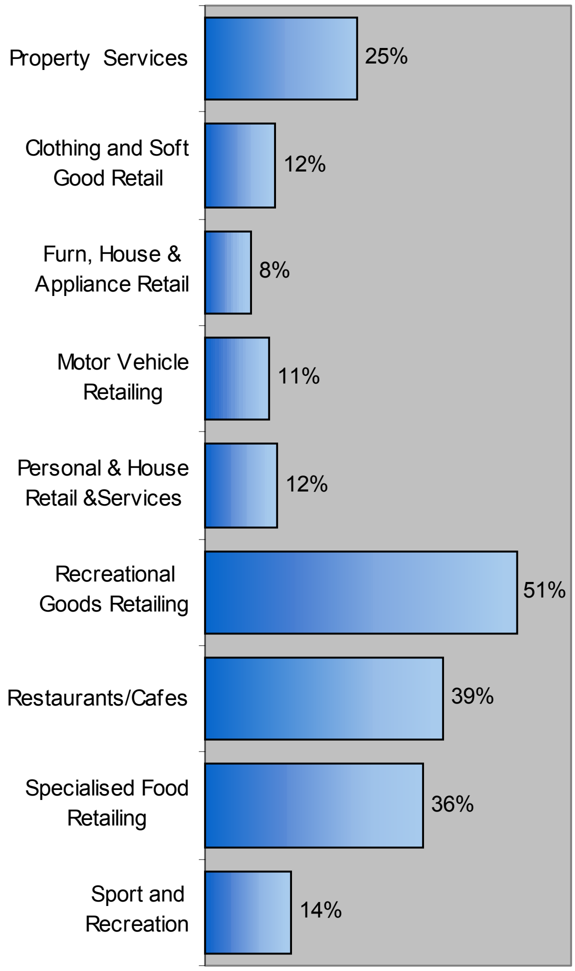
PROPORTION OF BUSINESS TURNOVER GENERATED BY VISITORS BY SEASON



22% of business income in 2003-2004 was generated by visitors to the Shire.

In the summer months almost one third of business income is generated by visitors to the Shire.

PROPORTION OF BUSINESS TURNOVER GENERATED BY VISITORS BY BUSINESS TYPE.

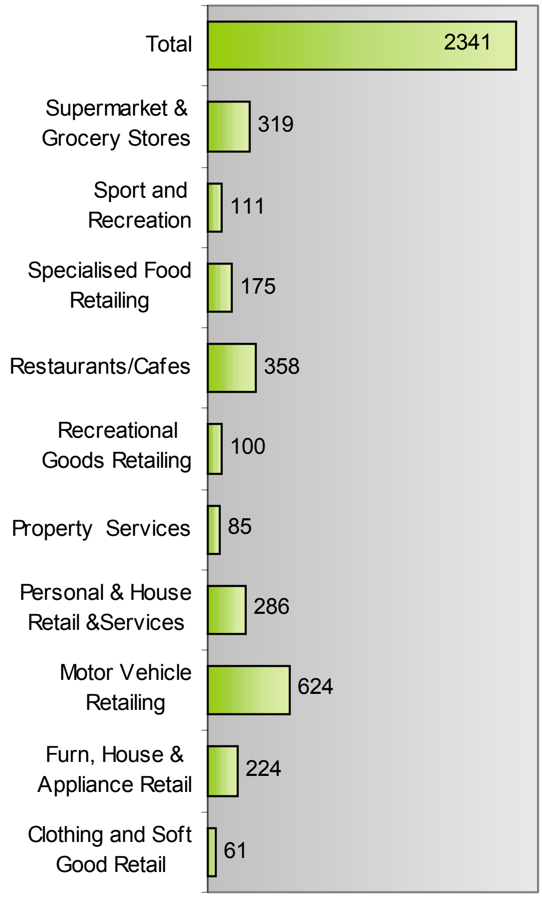


Visitors to the Shire contributed over half of the business turnover for recreational goods retailers.

Visitors to the Shire contributed over 40% of business turnover to restaurants/cafes.

7.5 EMPLOYMENT

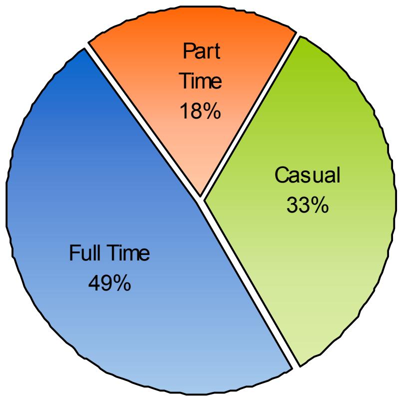
NUMBER OF PERSONS EMPLOYED



There are 2341 persons employed in businesses that benefit from visitors to the Shire.

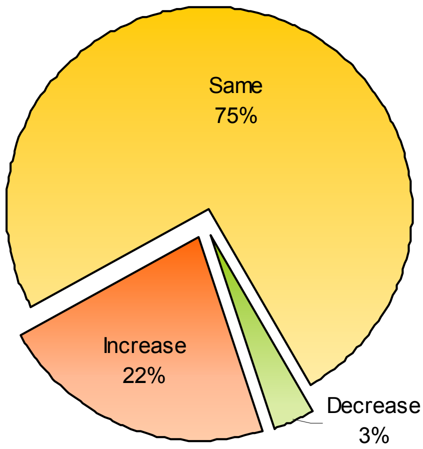
"Motor vehicle retailing" employed the most persons (624), followed by "restaurants/cafes" (358).

TYPE OF EMPLOYMENT



Half of the persons employed in businesses that are likely to benefit from visitors to the Shire are employed on a full time basis. One third of persons are employed on a casual basis.

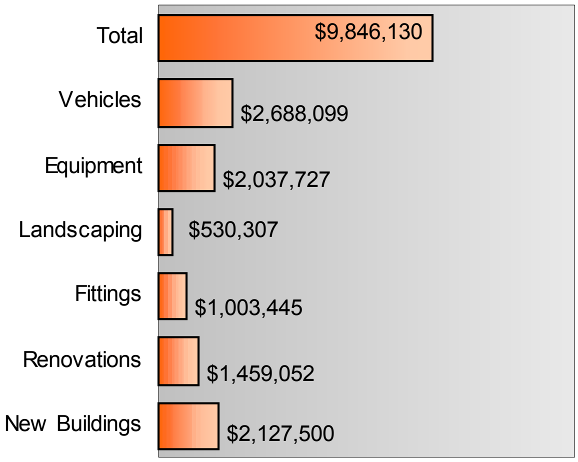
FUTURE EMPLOYMENT INTENTIONS (2003-2004)



Three quarters of businesses expect to have the same number of staff in 2003-2004.

7.6 CAPITAL INVESTMENT 2002-2003

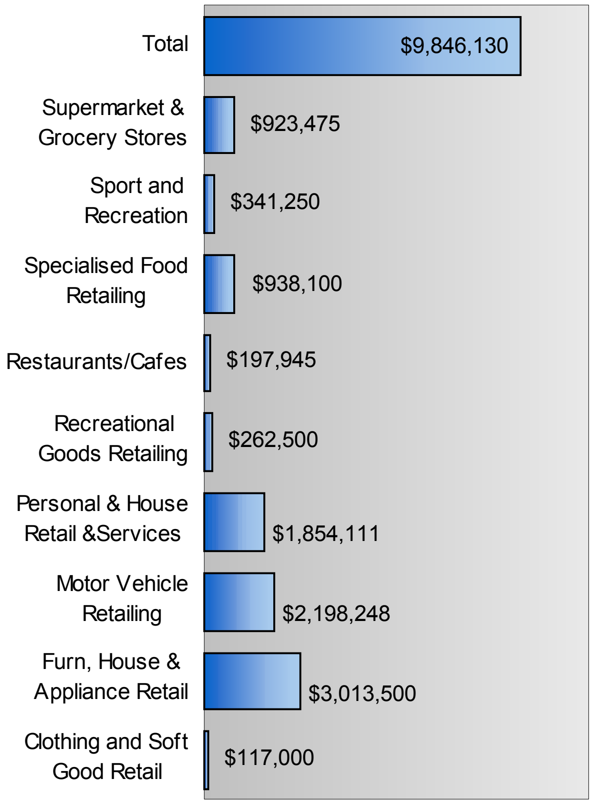
TYPE OF CAPITAL INVESTMENT



It is estimated that businesses that benefit from visitors to the South Gippsland Shire invested over $9.8 million in the financial year 2002-2003.

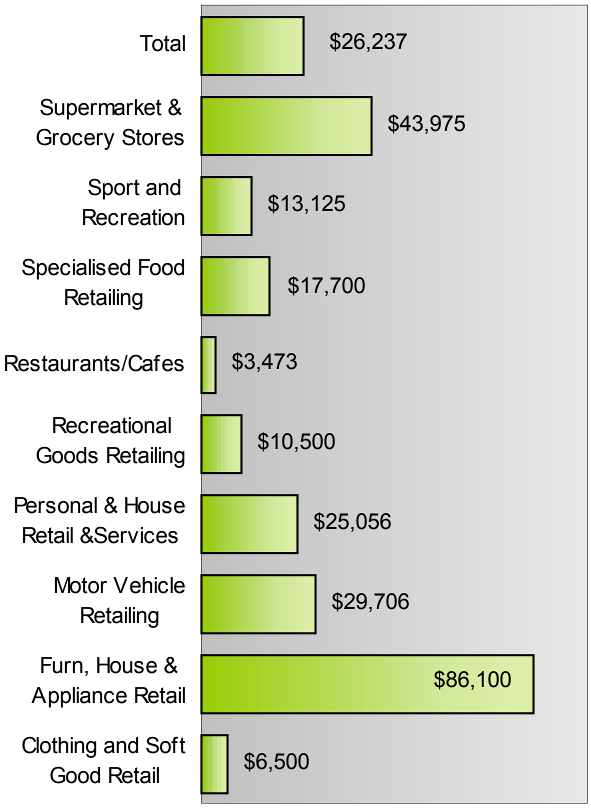
Businesses invested most capital in "vehicles".

TOTAL CAPITAL INVESTMENT BY BUSINESS TYPE



"Furniture, household and appliance retailers" in the South Gippsland Shire invested the most capital in the financial year 2002-2003 (over $ million), this was followed by "motor vehicle retailing" ($2.2 million).

AVERAGE CAPITAL INVESTMENT BY BUSINESSES TYPE

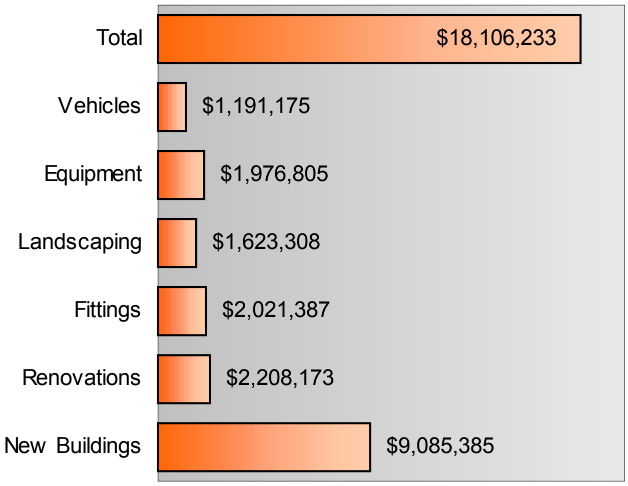


The average capital investment by these businesses is $26,237.

“Furniture household and appliance retailers” had the highest capital investment per business ($86,000); this is followed by “supermarket and grocery stores” ($43,975).

7.7 FUTURE CAPITAL INVESTMENT 2003-2004

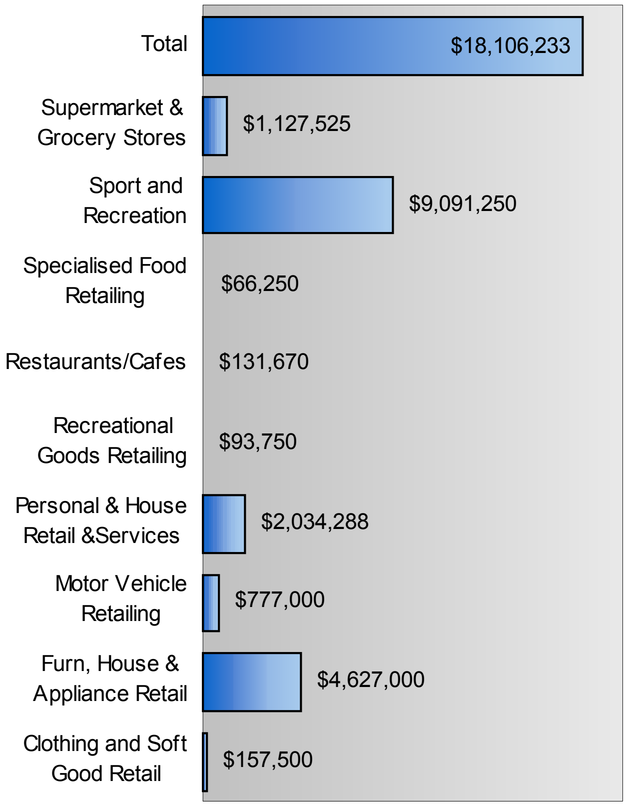
TYPE OF CAPITAL INVESTMENT



Businesses in the South Gippsland Shire, which benefit from visitors to the Shire, intend to invest over $18 million in capital in the financial year 2003-2004.

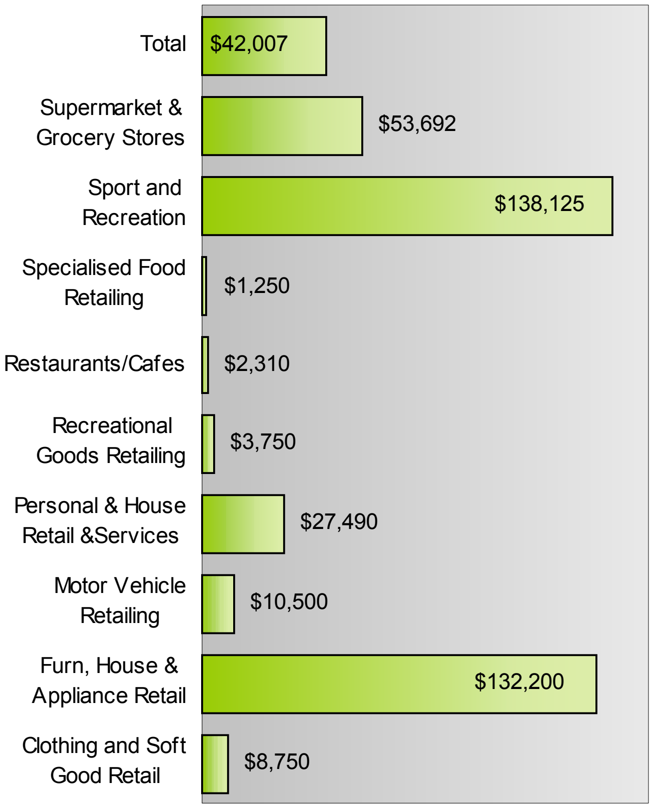
Half of the proposed investment is in “new buildings”, (over 49 million).

TOTAL CAPITAL INVESTMENT BY BUSINESS TYPE



Half of the intended capital investment in 2003-2004 is proposed by “sport and recreation” businesses.

AVERAGE CAPITAL INVESTMENT BY BUSINESS TYPE

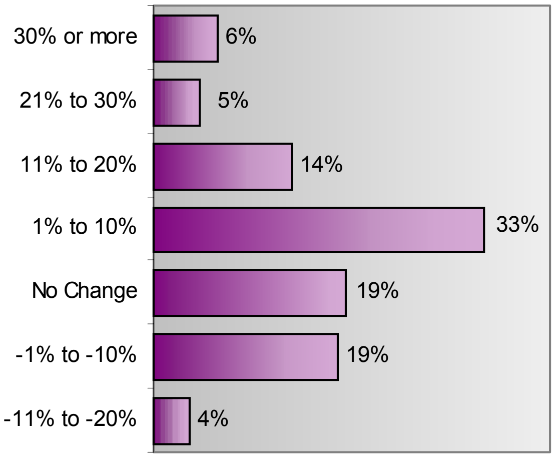


Businesses, which benefit from visitors to the Shire, intend to invest on average $42,000 in the financial year 2003-2004.

"Sport and recreation" businesses intend to invest the highest amount of capital per business in the financial year 2003-2004, ($138,258).

7.8 BUSINESS INCOME

CHANGE IN BUSINESS INCOME 2002-2003

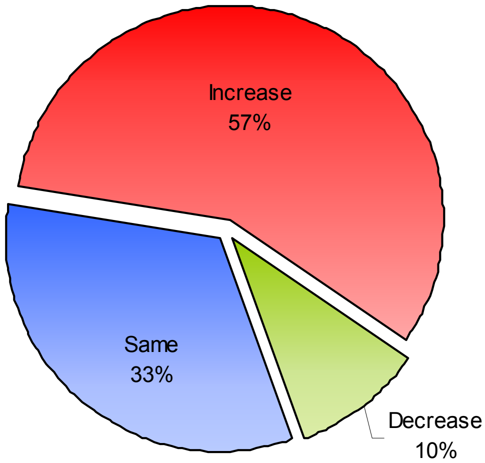


58% of businesses reported an increase in gross business income in the financial year 2002-2003.

A further 19% of businesses reported no change in gross business income in the financial year 2002-2003.

24% of businesses reported a decrease in gross business income.

PREDICTED FUTURE INCOME 2003-2004



57% of businesses predict an increase in gross business income in the financial year 2003-2004.

8 Tourism Monitoring Framework

8.1 OVERVIEW OF EXISTING TOURISM RESEARCH

The information presented in this report is the outcome of a holistic research approach and analysis of the tourism industry, using primary research methods. Such primary research methods are time consuming and costly. However primary research at the local level can be supplemented by existing data sources. Some relevant and improving secondary research is now available, this is outlined below.

National Visitor Survey Data – Bureau of Tourism Research

The National Visitor Survey has recently (March 2004) been made available at the Statistical Local Area level. This means that a profile of visitors can be created from an existing data source where previously it could not be. Subscribers of CDMota can obtain the data, which is a product of the Bureau of Tourism Research. The downfall to this data is the accuracy levels, which can be low for many SLA areas. The South Gippsland Shire is made up of three SLAs, and when combined the accuracy levels are only at an acceptable level for determining general conclusions.

Survey of Tourist Accommodation – Australian Bureau of Statistics

The Australia Bureau of Statistics undertakes a quarterly survey of accommodation establishments with 15 guest rooms or more. The research is undertaken as a census and presents an accurate picture of the large accommodation sector. However there is not data for accommodation establishments of 14 rooms or less, which is the predominant sector in the South Gippsland Shire.

Although the accommodation survey does not include results for small accommodation establishments, the results from the survey can provide trend information for guests, room nights and takings if collected and analysed on a yearly basis.

8.2 MONITORING THE ECONOMIC IMPACT OF TOURISM

This report provides comprehensive baseline information on the economic impact of tourism. However without continual updating, the information would progressively become obsolete. It is recommended that an on-going program of research be undertaken to maintain changes over time.

This program would be based on updating one component of the research each year on a rotational basis supplemented by analysis of the latest secondary data sources, namely the NVS and other relevant council databases.

The recommended research program comprises: -

Year 1 – Profile of the accommodation sector. Follow–up survey of all accommodation businesses and review of latest NVS data in respect of these results. Recalculation of the economic impact of tourism.

Year 2 – Profile of the business sector. Follow up survey of all tourism-related businesses and review of the latest NVS data in respect of these results. Recalculation of the economic impact of tourism.

Year 3 – Visitor profile. Follow up survey of visitors to the South Gippsland Shire, and review of the latest NVS in respect of these results. Recalculation of the economic impact of tourism.

Year 4 – Profile of the accommodation sector. Follow–up survey of all accommodation businesses and review of latest NVS data in respect of these results. Recalculation of the economic impact of tourism. Conduct a trend analysis based on the 3 surveys.

Year 5 – Repeat year 2 research

9 Implications for Marketing

9.1 VISITOR MARKETS

Melbourne Market

The research clearly indicates that holiday homeowners are a significant contribution to tourism in the South Gippsland Shire.

The data on the place of residence of holiday homeowners provides guidance for targeting marketing campaigns to holiday homeowners, mostly of who live in the eastern and southeastern areas of Melbourne.

Results from the visitor survey also indicate higher levels of visitation from areas in the southeastern and eastern areas of Melbourne.

Country Victoria

Visitors and holiday homeowners from country Victoria are concentrated in the regional areas surrounding the South Gippsland Shire. This includes the towns of Moe, Morwell and Yarragon to the north and Wonthaggi to the West.

There is also higher than average visitation to the South Gippsland Shire from regional centres of Ballarat and Bendigo.

Interstate Market

The visitor survey indicates that 11% of visitors to the South Gippsland Shire are from interstate. The NSW market makes up over half of all interstate visitation.

9.2 VISITOR PERCEPTION AND ACTIVITIES – WHAT TO MARKET

The vast majority of visitors (72%) visit national parks when frequenting the South Gippsland Shire, i.e.: Wilson's Promontory. In addition to this the visitor survey indicates that 43% of visitors associate the South Gippsland Shire most with Wilson's Promontory. In terms of marketing, the natural attractions within the South Gippsland Shire namely Wilson's Promontory and the ocean beaches should continue to be a focus for marketing campaigns. Natural attractions are responsible for attracting the majority of visitors to the region.

However, there is clearly a need to raise awareness for the Shire's other tourism attractions and activities. An example of this is that only 4% of visitors associated the Shire with farming, and 2% with food and wine.

9.3 NICHE MARKETS

There is a possibility to further develop niche markets in the South Gippsland Shire. The research indicates that bushwalking, going to the beach and undertaking outdoor activities are some of the key activities undertaken by visitors to the South Gippsland Shire. There is an opportunity to expand the backpacker market, which is suited to these popular these activities.

The visitor survey results indicate that 35% of visitors eat out, 21% of visitors visit a food producer and 15% of visitors visit wineries. Food and wine tourism is a potentially growing niche market.

Finally, the substantial amount of tourism generated by camping, suggests that this will continue to be an important market segment. Close co-operation with Parks Victoria and a focus on caravan and camping shows, publications and free publicity are strategies that can continue to cater to this market.

Appendices

Appendix A. Glossary of Terms and Definitions

ABS	Australian Bureau of Statistics, responsible for national statistics relating to population and industry.
Accommodation Businesses	This refers to all businesses listed on the prom country accommodation database.
Average Length Stay	This is the average taken from the total of all visitors nominated length of stay. It simply refers to how many days person stayed in the South Gippsland Shire.
BTR	Bureau of Tourism Research – a government funded body which undertakes tourism related research, namely the National Visitor Survey (NVS) and International Visitor Survey (IVS)
Capital Investment	This refers to the dollar amount, which businesses have spent, on their business for the financial year 2002-2003.
Country Victoria	This refers to all areas outside the Melbourne Metropolitan area.
Guest Nights	The number of guests physically staying in the accommodation facility.
Guest Rooms	The total number of rooms available at each establishment for accommodating short term paying guests.
Holiday Homes	This refers to all residential dwellings identified as being owned by persons who live outside the South Gippsland Shire.
IVS	International Visitor Survey – A survey of international visitors to Australia conducted in international airport departure lounges Australia wide.
Metropolitan Melbourne	This refers to all Local Government areas, which make up the Melbourne metropolis.
NVS	National Visitor Survey – An Australia wide phone survey of more than 80,000 respondents per year.
Occupancy	Occupancy in terms of room nights refers to the total number of nights each paying guest stayed.
Occupancy Rates	Occupancy rates represent occupancy expressed as a percentage of total capacity available.

Other businesses that Benefit From Visitors to the Shire	This refers to all businesses that derive more than 10% of their of turnover from visitors to the Shire.
Room Nights	Number of rooms physically occupied.
Room Nights Available	The number of guest rooms/units available multiplied by the number of days for which they were available.
Specialised Tourism Businesses	This refers to all businesses, which have been identified as specifically targeting tourists/ visitors for the majority of their income.
Takings	Takings refer to the gross earnings businesses accumulate from selling their product or service.
Turnover/ Business Income	This refers to all income derived by a business from products or services, which they sell.
Visitor	This refers to persons who visit the Shire and live outside the Shire.
Visitor Accommodation	This refers to self-contained cottages, motels, hotels, guesthouses, cabins, backpackers, B&Bs and camping grounds. Holiday homes are defined separately.
Visitor Activities	This refers to the activities undertaken by visitors to the South Gippsland Shire.
Visitor Days	This refers to the number of days visitors spend in the South. For example, two visitors' spending 10 days in the Shire is equal to 20 visitor days.
Visitor Expenditure	This refers to the amount that visitors have spent or intend to spend in the Shire.
Visitor Nights	This refers to the number of nights visitors spend in the Shire. For example, two visitors spending 10 nights in the Shire, equals 20 visitor nights.

Appendix B. References

Australian Bureau of Statistics: (2002) *CDATA 2001, Employment by Industry*

Australian Bureau of Statistics: (2003) *Summary of Caravan Parks (Victoria)*

Bureau of Tourism Research (2003) *CDMOTA National Visitor Survey 2003*