

# Travel to the Grampians

Year ended December 2009

Quarterly tracking of selected measures

Prepared for Grampians Tourism  
March 2010

# Background

- This report provides results from selected measures of travel to the Grampians campaign region for the year ended December 2009.
  - The region comprises: the Western Grampians, Central Highlands and Wimmera tourism regions, plus the SLAs of: Pyrenees (S) – North; and Pyrenees (S) – South.
- Data from the International Visitor Survey (IVS), National Visitor Survey (NVS), and Visitor Information Centres in Ararat, Avoca, Dunkeld, Halls Gap and Horsham for the period year ended December 2005 to year ended December 2009 has been used. In addition, monthly visits to [www.visitvictoria.com](http://www.visitvictoria.com) from March 2009 have also been used.
- The report is split into seven sections: **Insights, Total Travel, International Travel, Domestic Overnight Travel, Domestic Daytrips, Visitor information Centres and Internet Visitation.**
- **Note: Percentage change figures provided in this report do not necessarily represent statistically significant change.**

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# Insights

## **Total travel to the Grampians - YE Dec 09 on YE Dec 08**

- Visitors increased by 9.9% to nearly 1.4 million.
- Visitors spent **nearly 1.7 million nights** in the region.

## **International overnight travel to the Grampians - YE Dec 09 on YE Dec 08**

- Visitors decreased by 13.9% to 34,100.
- Visitors spent **203,000 nights** spent in the region
- In the period YE Dec 05 to YE Dec 09: visitors to the region experienced an average annual decline of 5.3%.

## **Domestic overnight travel to the Grampians - YE Dec 09 on YE Dec 08**

- Visitors decreased by 5.1% to 593,000.
- Nights increased by 0.9% to nearly 1.5 million.
- In the period YE Dec 05 to YE Dec 09: both visitors (-4.2%) and nights (-8.9%) in the region experienced an average annual decline.

**Results in red are considered statistically unreliable and are for INTERNAL USE ONLY.**

# Insights

## **Domestic daytrips to the Grampians - YE Dec 09 on YE Dec 08**

- Daytrip visitors increased by 27.8% to 741,000.
- In the period YE Dec 05 to YE Dec 09: daytrips to the region experienced average annual decline of 0.4%.

## **Visits to selected VICs in the Grampians - YE Dec 09 on YE Dec 08**

- Visitors increased to Ararat, Dunkeld and Halls Gap, while Avoca and Horsham had a decrease.
- In the period YE Dec 05 to YE Dec 09: Avoca experienced average annual growth in visitors, while Ararat, Dunkeld, Halls Gap and Horsham had a decline.

## **Visits to [www.visitvictoria.com](http://www.visitvictoria.com) - Feb 10 on Jan 10**

- 'Visits', 'pages viewed', 'average page views', 'time on site' and 'new visits' decreased.

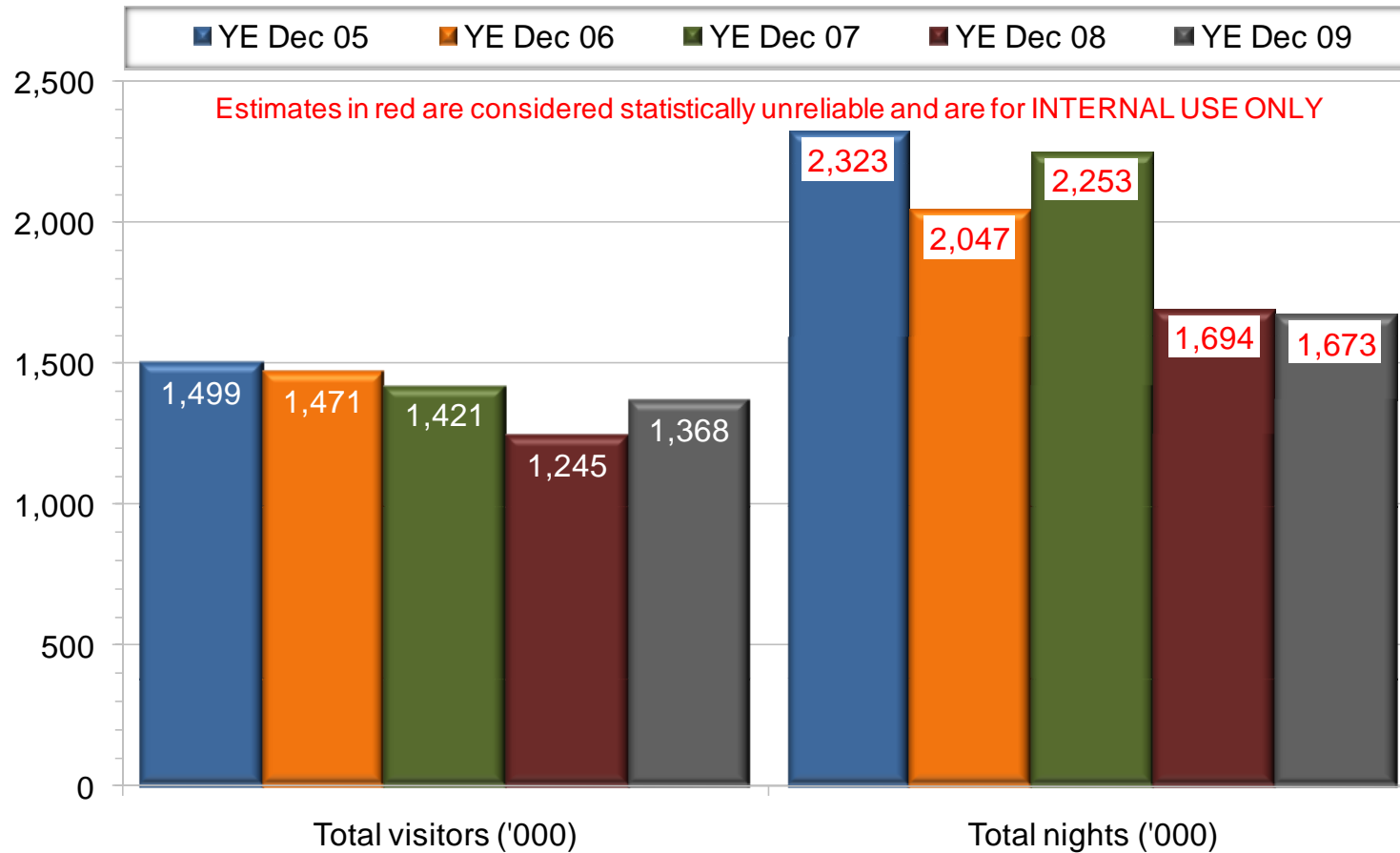
# Total Travel

Travel **to** the Grampians by domestic and international visitors aged 15 and over.

PLEASE NOTE:

The data used is subject to sampling variability. Users are advised to consult the data confidence tables contained in publications relevant to the NVS and IVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

# Total visitors and nights



Nights estimates are considered statistically unreliable and are for INTERNAL USE ONLY.

- In YE Dec 09, the Grampians received nearly 1.4 million **visitors** - up by 9.9% on YE Dec 08, but down by 8.8% on YE Dec 05.
- Visitors spent **nearly 1.7 million nights** in the region.

# International Travel

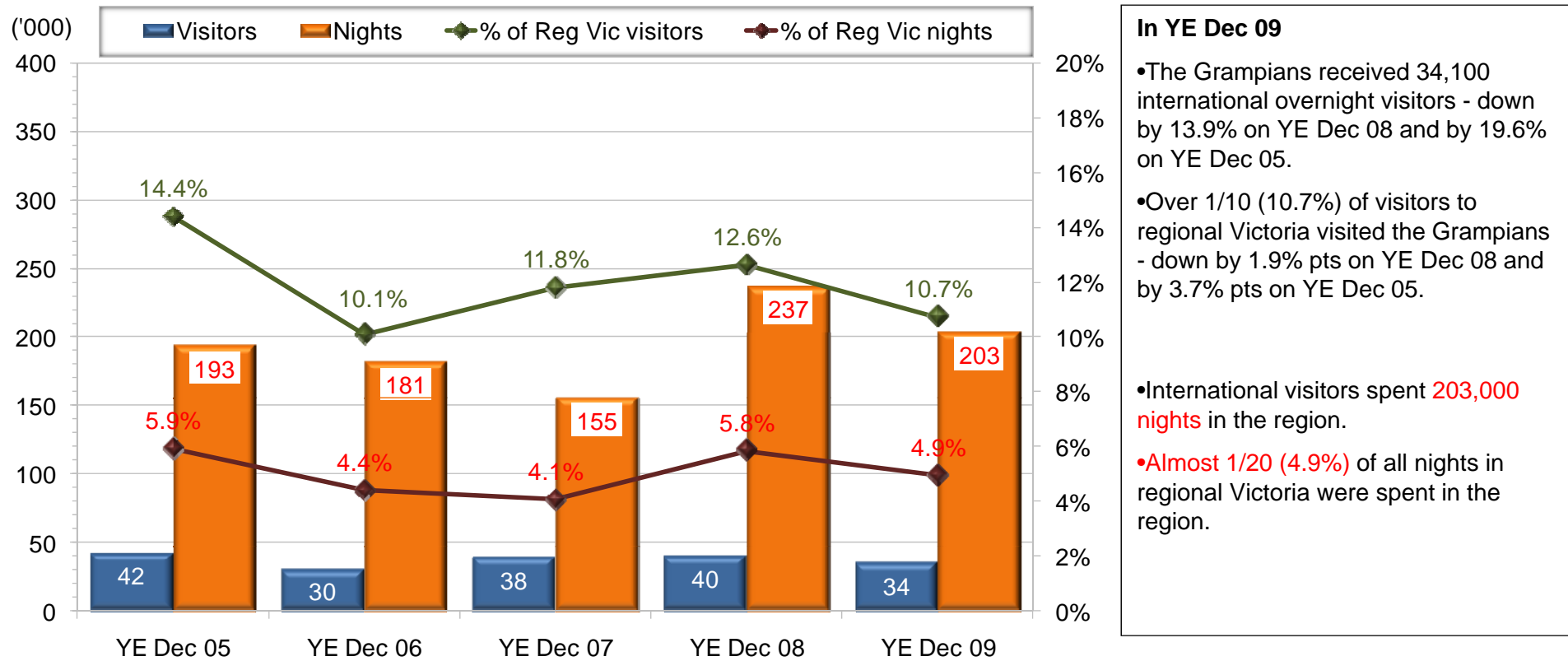
Overnight travel **to** the Grampians by international visitors aged 15 and over.

PLEASE NOTE:

The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the IVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

Some graphs contain results below the data confidence intervals used by Tourism Victoria, ie. 5,000 for visitors and 500,000 for nights. datainsights recommends that any such estimates should be for internal use only.

# Visitors, nights and market share

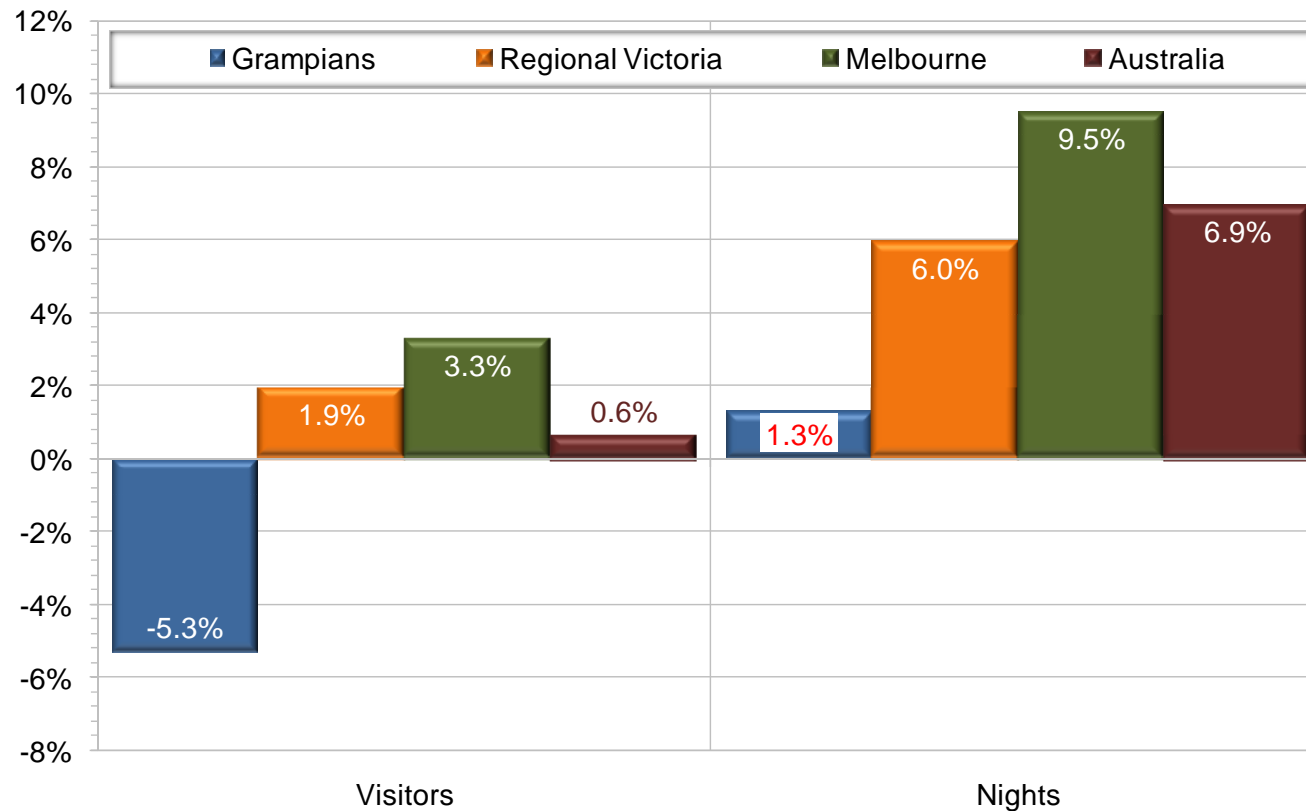


**In YE Dec 09**

- The Grampians received 34,100 international overnight visitors - down by 13.9% on YE Dec 08 and by 19.6% on YE Dec 05.
- Over 1/10 (10.7%) of visitors to regional Victoria visited the Grampians - down by 1.9% pts on YE Dec 08 and by 3.7% pts on YE Dec 05.
- International visitors spent 203,000 nights in the region.
- Almost 1/20 (4.9%) of all nights in regional Victoria were spent in the region.

Nights estimates are considered statistically unreliable and are for INTERNAL USE ONLY.

# Average annual growth for selected destinations

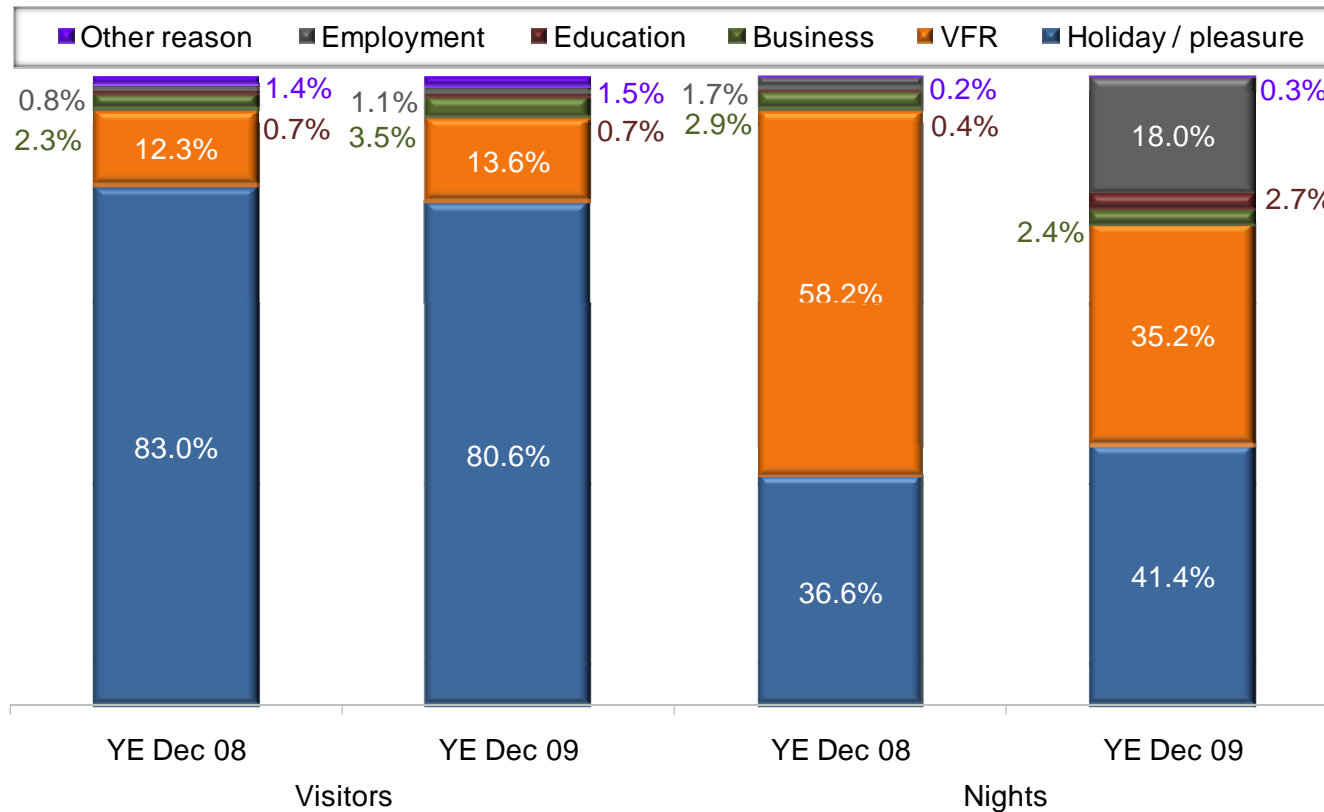


### YE Dec 05 to YE Dec 09

- Over the period, the Grampians had an average annual decline of 5.3% in international overnight **visitors**.
- While the Grampians had a decline, regional Victoria, Melbourne and Australia experienced growth.
- The Grampians had an average annual growth of 1.3% in international visitor **nights** over the period.
- Regional Victoria, Melbourne and Australia experienced growth in visitor **nights** over the period.

Results for nights in the Grampians are based on estimates that are considered statistically unreliable and are for INTERNAL USE ONLY.

# Purpose of visit



## YE Dec 09

•‘Holiday / pleasure’ (80.6%) was the most popular purpose for international overnight **visitors** to the Grampians – down by 2.4% points on YE Dec 08.

•‘VFR’ or ‘visiting friends and relatives’ (13.6%) was the 2<sup>nd</sup> most popular – up by 1.3% points on YE Dec 08.

•‘Business’ (3.5%) was the 3<sup>rd</sup> most popular – up by 1.2% points on YE Dec 08.

•‘Holiday / pleasure’ (41.4%) was the most popular purpose in terms of international visitor **nights** in the Grampians.

•‘VFR’ or ‘visiting friends and relatives’ (35.2%) was the 2<sup>nd</sup> most popular.

•‘Employment’ (18.0%) was the 3<sup>rd</sup> most popular.

## Origin of visitors

Origin	Share of total visitors				
	YE Dec 05	YE Dec 06	YE Dec 07	YE Dec 08	YE Dec 09
New Zealand	9.4%	14.1%	10.7%	12.0%	8.9%
Asia	12.2%	8.5%	7.0%	9.9%	7.5%
USA	5.0%	6.8%	9.9%	8.5%	4.7%
Canada	4.3%	4.4%	4.5%	3.8%	6.2%
United Kingdom	21.4%	24.4%	22.3%	19.5%	23.8%
Germany	20.3%	10.2%	13.4%	19.2%	17.0%
Scandinavia	3.2%	5.6%	5.2%	3.2%	4.5%
Netherlands	6.7%	6.8%	6.3%	6.7%	6.4%
Switzerland	3.9%	5.4%	3.5%	4.6%	4.1%
Other Europe	9.5%	10.8%	13.4%	9.7%	11.4%
Other Countries	3.9%	3.1%	3.9%	2.8%	5.5%

Note: results in red are based on estimates considered statistically unreliable.

- **In YE Dec 09**, United Kingdom (23.8%) remained the largest individual source market of international overnight visitors to the Grampians – up by 4.7% on the YE Dec 08. UK's share of international visitors to the region was up by 4.3% points over the same period.
- Germany (17.0%) was the 2<sup>nd</sup> largest source market – down by 23.8% and by 2.2% points on YE Dec 08.
- Other Europe (11.4%) was the 3<sup>rd</sup> largest source market.

Note: change on previous year should only be analysed for markets which have results based on statistically reliable estimates.

# Domestic Overnight Travel

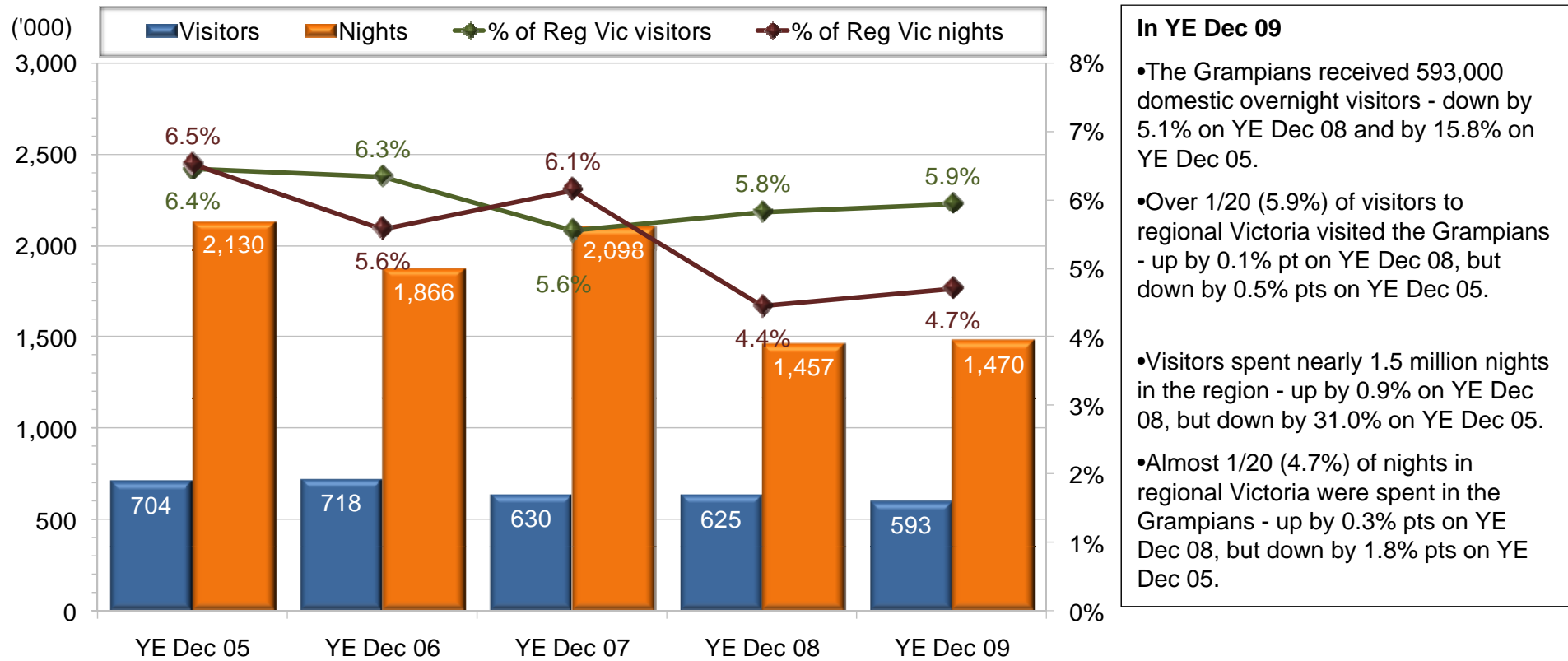
Overnight travel **to** the Grampians by Australian residents aged 15 and over.

PLEASE NOTE:

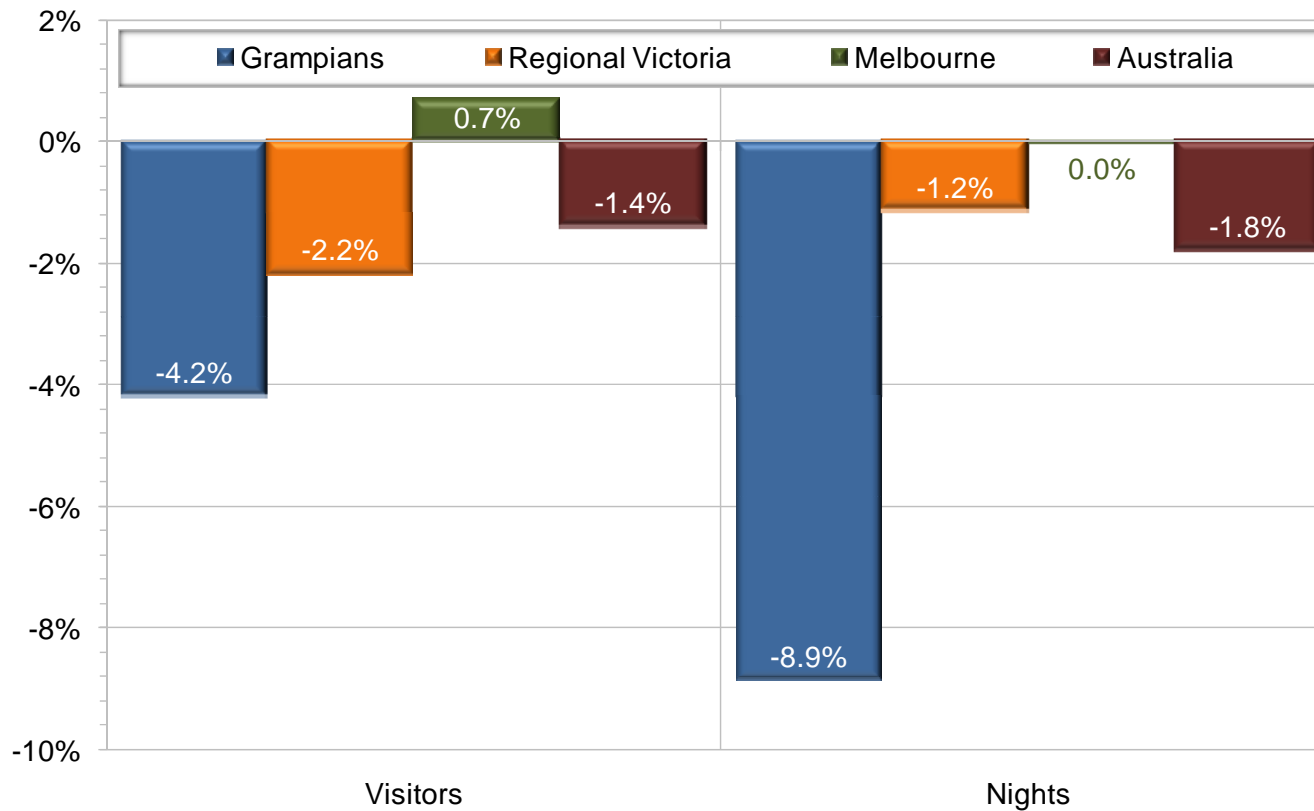
The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the NVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

Some graphs contain results below the data confidence intervals used by Tourism Victoria, ie. 80,000 for visitors and 500,000 for nights. datainsights recommends that any such estimates should be for internal use only.

# Visitors, nights and market share



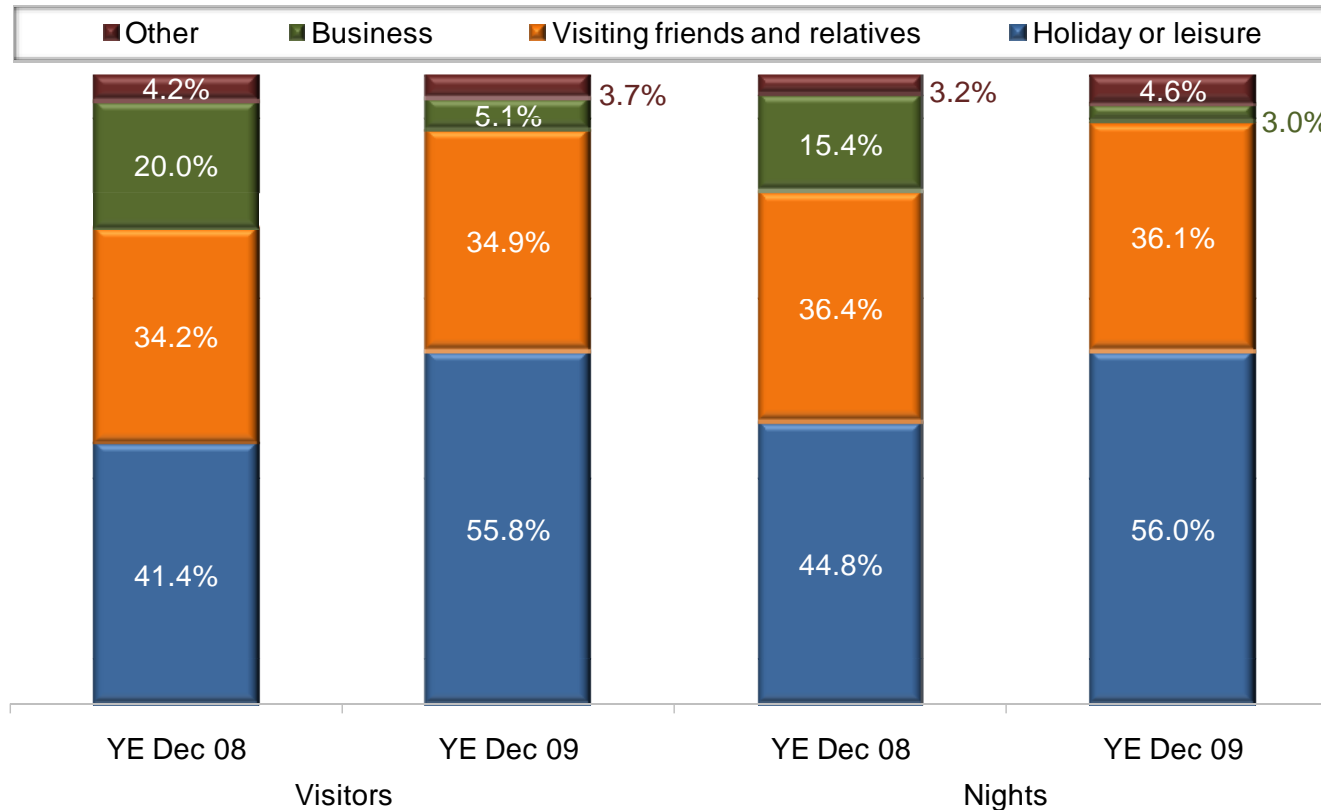
# Average annual growth for selected destinations



## YE Dec 05 to YE Dec 09

- Over the period, the Grampians had an average annual decline of 4.2% in domestic overnight **visitors**.
- The Grampians had a higher decline than regional Victoria and Australia. Melbourne experienced growth.
- The Grampians had an average annual decline of 8.9% in domestic visitor **nights** over the period.
- The Grampians had a higher decline than regional Victoria and Australia.

# Purpose of visit



## In YE Dec 09

- ‘Holiday or leisure’ (55.8%) was the most popular purpose for domestic overnight **visitors** to the Grampians – up by 14.4% points on YE Dec 08.
- ‘Visiting friends and relatives’ (34.9%) was the 2<sup>nd</sup> most popular – up by 0.7% pts on YE Dec 08.
- ‘Business’ (5.1%) was the 3<sup>rd</sup> most popular – down by 14.9% points on YE Dec 08.
- ‘Holiday or leisure’ (56.0%) was the most popular purpose in terms of domestic **nights** in the Grampians – up by 11.2% points on YE Dec 08.
- ‘Visiting friends and relatives’ (36.1%) was the 2<sup>nd</sup> most popular – down by 0.3% points on YE Dec 08.
- ‘Business’ (3.0%) was the 3<sup>rd</sup> most popular – down by 12.4% points on YE Dec 08.

## Origin of visitors and nights

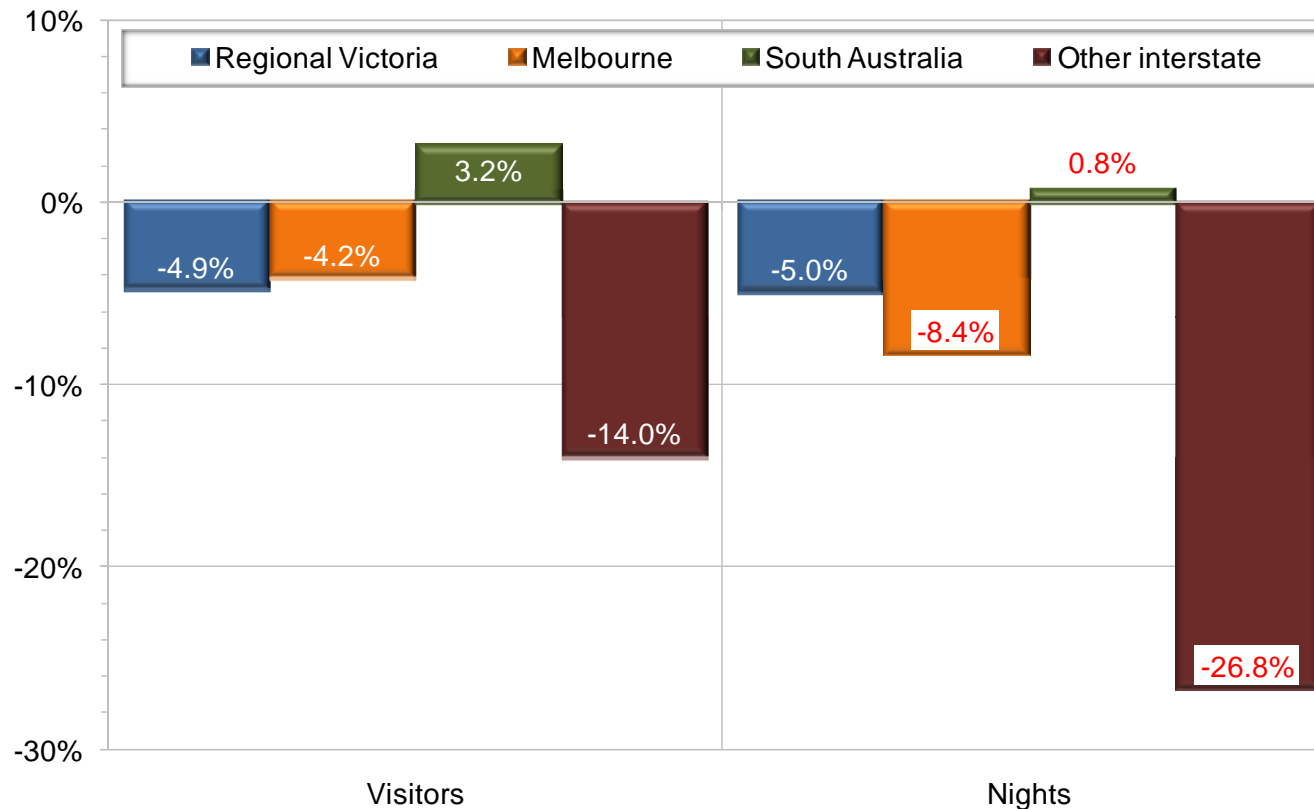
Share of total visitors						Share of total nights					
Origin	YE Dec 05	YE Dec 06	YE Dec 07	YE Dec 08	YE Dec 09	Origin	YE Dec 05	YE Dec 06	YE Dec 07	YE Dec 08	YE Dec 09
Regional Victoria	40.6%	39.1%	42.7%	43.0%	39.5%	Regional Victoria	32.8%	32.7%	28.7%	38.4%	38.7%
Melbourne	37.6%	34.7%	32.7%	30.1%	37.6%	Melbourne	32.9%	36.2%	24.3%	29.9%	33.5%
Total intrastate	78.3%	73.8%	75.2%	73.1%	77.1%	Total intrastate	65.7%	68.9%	53.0%	68.4%	72.2%
NSW	3.8%	6.7%	4.3%	6.6%	4.7%	NSW	4.5%	10.7%	3.2%	11.0%	5.9%
Queensland	2.0%	3.3%	2.4%	3.8%	0.0%	Queensland	13.5%	3.6%	30.4%	3.9%	0.0%
SA	12.6%	12.8%	15.6%	14.4%	17.0%	SA	12.4%	11.5%	10.6%	14.1%	18.6%
WA	1.0%	0.8%	1.0%	1.0%	0.2%	WA	0.7%	0.9%	1.4%	1.8%	0.2%
Tasmania	1.0%	1.0%	1.0%	0.6%	0.5%	Tasmania	1.1%	1.5%	0.6%	0.5%	0.3%
NT	0.1%	0.6%	0.3%	0.3%	0.3%	NT	0.8%	0.5%	0.4%	0.1%	2.4%
ACT	1.0%	1.0%	0.3%	0.5%	0.3%	ACT	1.3%	2.5%	0.4%	0.2%	0.4%
Total interstate	21.7%	26.0%	24.6%	27.0%	22.9%	Total interstate	34.3%	31.1%	46.9%	31.6%	27.8%

Note: results in red are based on estimates considered statistically unreliable.

- In YE Dec 09, the Grampians received over  $\frac{3}{4}$  (77.1%) of **visitors** from Victoria – the number visitors was unchanged on YE Dec 08. Victoria's contribution to visitors was up by 4.0% points over the same period. Compared to YE Dec 08, visitors from regional Victoria declined by 13.0% while visitors from Melbourne increased by 18.6%.
- Nearly  $\frac{1}{4}$  (22.9%) of visitors came from interstate – down by 19.5% and by 4.1% points on YE Dec 08. South Australia (17.0%) was the largest market of interstate visitors – up by 12.2% on YE Dec 08.
- The Grampians received nearly  $\frac{3}{4}$  (72.2%) of visitor **nights** from Victoria - up by 6.6% on YE Dec 08. Victoria's contribution to visitors was up by 3.8% points over the same period. Compared to YE Dec 08, visitor nights by regional Victorians increased by 1.6%.
- Nearly  $\frac{3}{10}$  (27.8%) of nights were from interstate. South Australia (18.6%) was the largest contributor of interstate nights.

Note: change on previous year should only be analysed for markets which have results based on statistically reliable estimates.

# Average annual growth by selected origin markets



## YE Dec 05 to YE Dec 09

- Over the period, the Grampians had an average annual growth in domestic **visitors** from South Australia, while a decline from regional Victoria, Melbourne and other interstate.
- Visitors from South Australia (3.2%) had the highest average growth, while other interstate had the highest decline (14.0%).
- The Grampians had an average annual decline in domestic visitor **nights** from regional Victoria, **Melbourne and other interstate** over the period, while nights from **South Australia** grew.
- Nights by **South Australians** (0.8%) had the highest growth.
- Nights by **other interstate** visitors (26.8%) had the highest decline.

Results for nights by Melbournians, South Australians and Other interstate travellers are based on estimates that are considered statistically unreliable and are for INTERNAL USE ONLY.

# Domestic Daytrips

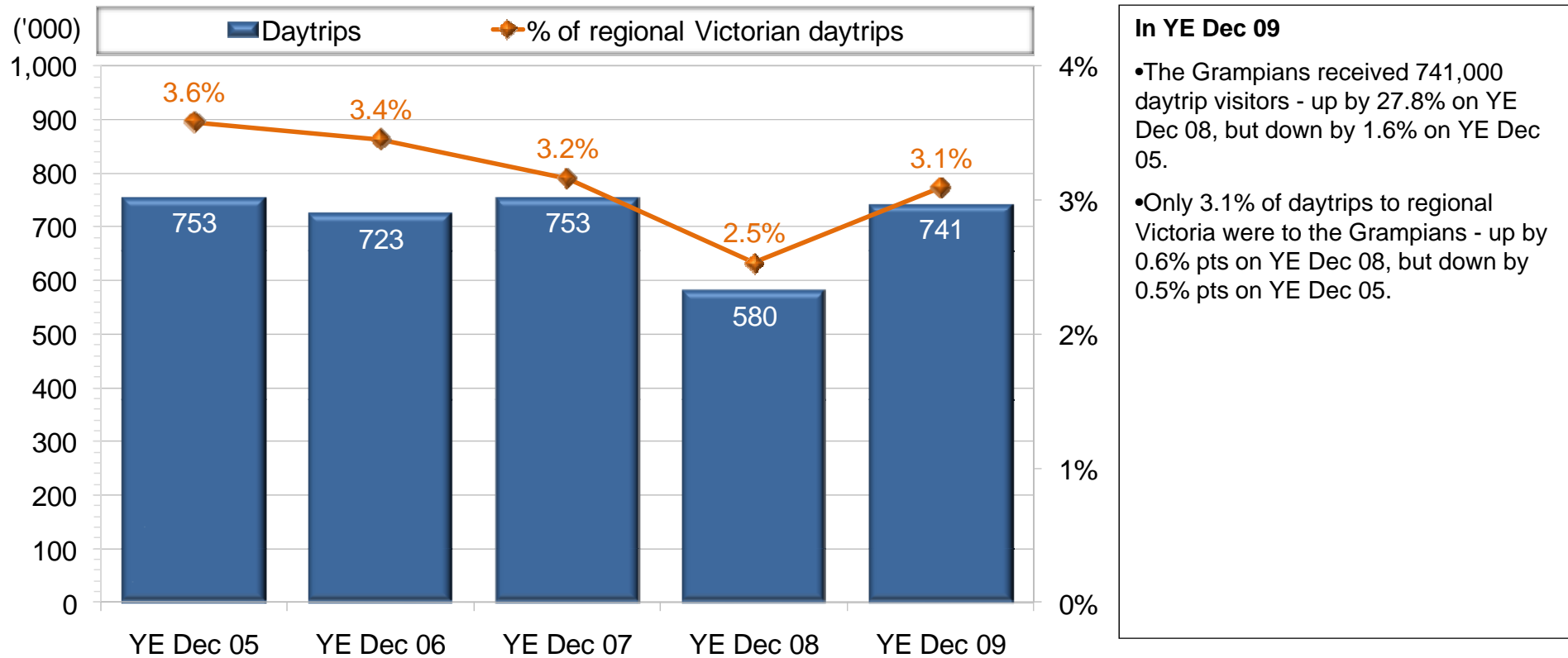
Daytrips **to** the Grampians by Australian residents aged 15 and over.

PLEASE NOTE:

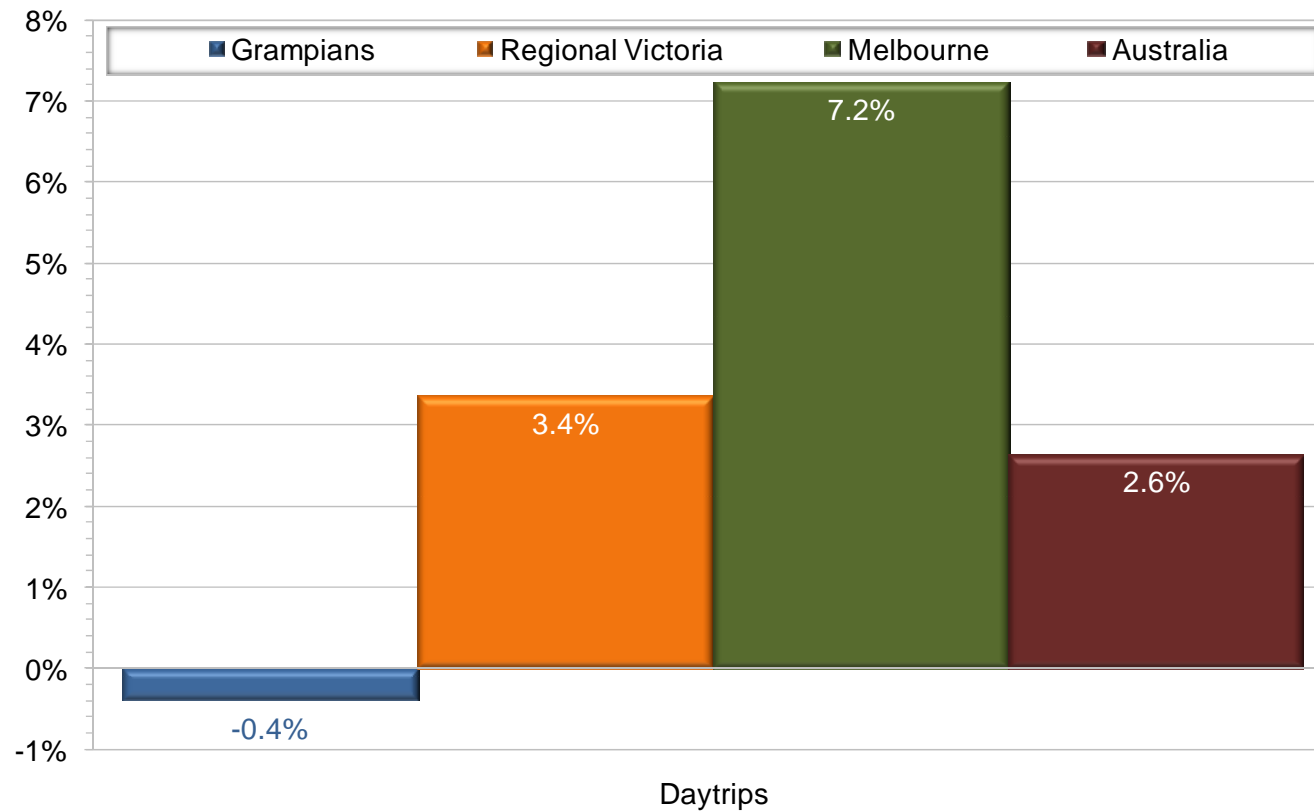
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# Daytrips and market share



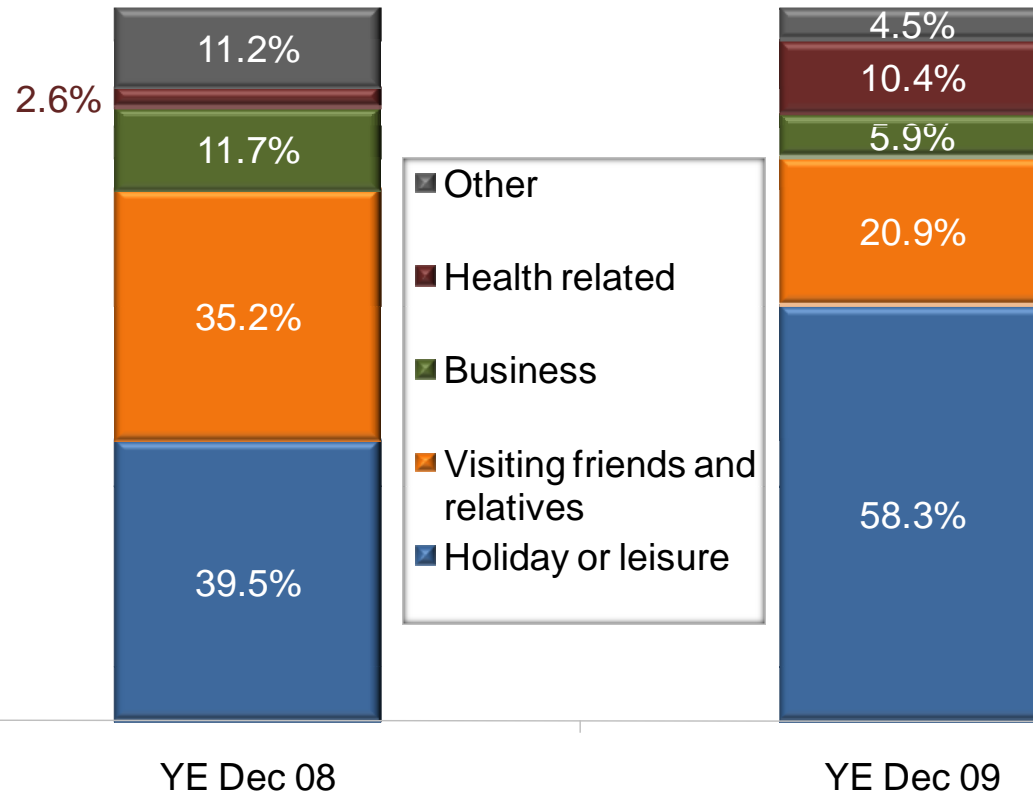
# Average annual growth for selected destinations



## YE Dec 05 to YE Dec 09

- Over the period, the Grampians had an average annual decline of 0.4% in domestic daytrips.
- While the Grampians had a decline, regional Victoria, Melbourne and Australia experienced growth.

# Main purpose of trip



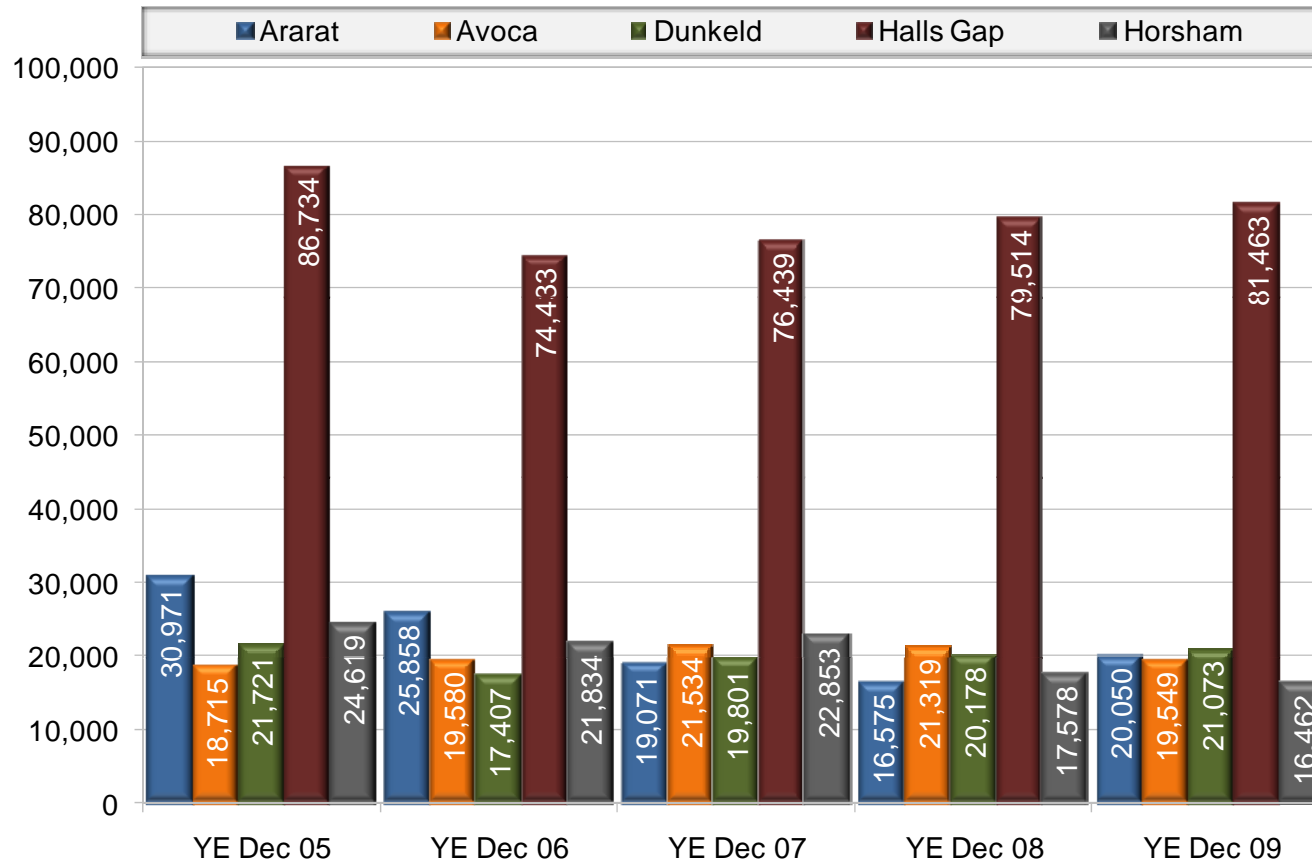
### YE Dec 09

- 'Holiday or leisure' (58.3%) was the most popular purpose for domestic daytrips to the Grampians – up by 18.8% points on YE Dec 08.
- 'Visiting friends and relatives' (20.9%) was the 2<sup>nd</sup> most popular – down by 14.3% points on YE Dec 08.
- 'Health related' (10.4%) was the 3<sup>rd</sup> most popular – up by 7.8% points on YE Dec 08.

# Visitor Information Centres

Visitors to selected Visitor Information Centres in the Grampians

# Visitation to selected VICs



### In YE Dec 09

- Ararat VIC received 20,050 visitors – up by 21.0% on YE Dec 08, but down by 35.3% on YE Dec 05.
- There were 19,549 visitors to the Avoca VIC - down by 8.3% on YE Dec 08, but up by 4.5% on YE Dec 05.
- Dunkeld VIC received 21,073 visitors - up by 4.4% on YE Dec 08, but down by 3.0% on YE Dec 05.
- There were 81,463 visitors to Halls Gap VIC - up by 2.5% on YE Dec 08, but down by 6.1% on YE Dec 05.
- Horsham VIC received 16,462 visitors - down by 6.3% on YE Dec 08 and by 33.1% on YE Dec 05.

### YE Dec 05 to Dec 09

- In the period YE Dec 05 to YE Dec 09, the Avoca VIC had an average annual growth of 1.1%.
- Over the same period, Ararat VIC (-10.3%), Dunkeld VIC (-0.8%), Halls Gap VIC (-1.6%) and Horsham VIC (-9.6) experienced an average annual decline.

# Internet Visitation

Monthly visits to [www.visitvictoria.com](http://www.visitvictoria.com)

PLEASE NOTE:

The data used is subject to sampling variability. Users are advised to consult Tourism Victoria before drawing any conclusions or inferences, or taking any action, based on the data.

## Visits, page views, average page views, time on site, and new visits

Indicator	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Change on previous month	Change on corresponding month previous year
Visits ('000)	21.3	21.6	16.3	21.0	17.1	18.4	19.0	18.0	16.0	17.6	18.0	16.5	na	-8.2%	na
Page views ('000)	241.4	261.7	196.8	205.2	190.7	200.3	209.4	198.3	168.8	200.3	196.0	176.5	na	-10.0%	na
Average page views	11.3	12.1	12.1	9.8	11.2	10.9	11.0	11.0	10.6	11.4	10.9	10.7	na	-2.0%	na
Time on site	10.09	10.27	10.40	8.20	9.31	9.35	9.33	9.42	9.20	10.08	9.22	9.11	na	-1.2%	na
New visits	56.4%	54.3%	55.7%	59.3%	58.6%	59.1%	65.8%	65.1%	66.2%	62.9%	64.5%	62.4%	na	-2.1	na

- **In Feb 10**, there were 16,517 visits to “Grampians” on [www.visitvictoria.com](http://www.visitvictoria.com) - down by 8.2% on Jan 10. Over the previous 11 months, “Grampians” received the highest number of visits in Apr 09 (21,606).
- “Grampians” visitors viewed 176,460 pages in Feb 10 - down by 10.0% on Jan 10. In the period Mar 09 to Feb 10, visitors viewed the highest number of pages in Apr 09 (261,654).
- In Feb 10, “Grampians” visitors viewed on average 10.7 pages - down by 2.0% on Jan 10. Over the previous 11 months, Apr 09 (12.1 pages) had the highest average number of pages viewed.
- “Grampians” visitors spent 9 minutes and 11 seconds on the site in Feb 10 - down by 1.2% on Jan 10. In the period Mar 09 to Feb 10, visitors spent the longest amount of time on site in May 09 (10 minutes and 40 seconds).
- In Feb 10, “Grampians” received 62.4% new visitors - down by 2.1% points on Jan 10. Over the previous 11 months, Nov 09 (66.2%) had the highest proportion of new visitors.

## Notes - IVS & NVS data (1 of 2)

### ○ Definitions -

- International overnight visitor = an international resident, aged 15 and over, who visited Australia (for a period of no more than 12 months) and stayed at least one night in the 'destination'.
- Domestic overnight trip = a trip involving a stay away from home for at least one night (but for no more than 12 months), at a place (in Australia) at least 40km from home.
- Domestic overnight visitor = an Australian resident, aged 15 and over, who had taken a domestic overnight trip.
- Domestic daytrip = a round trip for a distance of at least 50km, of a duration of at least 4 hours but not involving a night away from home (same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home).
- Domestic daytrip visitor = an Australian resident, aged 15 and over, who had taken a domestic daytrip.
- The Grampians = the tourism regions of 'Western Grampians', 'Central Highlands' and 'Wimmera' (*TRA regional classification*) plus the SLAs of: Pyrenees (S) – North; and Pyrenees (S) – South.
- Western Grampians = the SLAs of: Horsham (RC) - Central ; Horsham (RC) Bal; South Grampians (S) – Hamilton; South Grampians (S) – Wannon; South Grampians (S) – Bal; and West Wimmera (S).
- Central Highlands = the SLAs of: Ararat (RC); North Grampians (S) – St Arnaud; and North Grampians (S) – Stawell.
- Wimmera = the SLAs of: Buloke (S) – North; Buloke (S) – South; Hindmarsh (S); Yarriambiack (S) – North; and Yarriambiack (S) – South.
- Melbourne = the tourism region 'Melbourne' (*TRA regional classification*).
- Regional Victoria = all tourism regions in Victoria other than 'Melbourne'.

## Notes - IVS & NVS data (2 of 2)

- Abbreviations -
  - Grampians = The Grampians campaign region.
  - Reg Vic = Regional Victoria.
- Sampling variability and data confidence intervals -
  - The IVS and the NVS are sample surveys. The results are subject to sampling variability, and therefore may differ from figures that would have been obtained if a census had been used.
  - Any **IVS** estimates below 5,000 for visitors and 500,000 for nights should be for internal use only.
  - Any **NVS** estimates below 50,000 for overnight visitors, 500,000 for nights and 200,000 for daytrips should be for internal use only.
  - Percentage change figures provided in this report do not necessarily represent statistically significant change.

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The National Visitor Survey and the International Visitor Survey are sample surveys. As with all sample surveys, the results are subject to sampling variability, and therefore may differ from figures that would have been obtained if a census had been used. Users of the data are advised to consult data confidence tables contained in publications relevant to each survey or otherwise available from those organisations administrating or managing the surveys before drawing any conclusions or inferences, or taking any action, based on the data.

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