



# Travel to the Grampians

## Year ended September 2009

Quarterly tracking of selected measures

Prepared for Grampians Tourism  
December 2009

# Background

- This report provides results from selected measures of travel to the Grampians campaign region for the year ended September 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 September 2005 to year ended September 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 Sep 09 on YE Sep 08**

- Visitors increased by 8.0% to over 1.3 million.
- Visitors spent **over 1.7 million nights** in the region.

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

- Visitors decreased by 19.1% to 35,200.
- Visitors spent **221,400 nights** spent in the region
- In the period YE Sep 05 to YE Sep 09: visitors to the region experienced an average annual decline of 9.4%.

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

- Visitors increased by 11.1% to 662,000.
- Nights increased by 6.1% to over 1.5 million.
- In the period YE Sep 05 to YE Sep 09: both visitors and nights in the region experienced an average annual decline, 0.5% and 6.7% respectively.

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

# Insights

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

- Daytrip visitors increased by 7.0% to 646,000.
- In the period YE Sep 05 to YE Sep 09: daytrips to the region experienced average annual decline of 3.5%.

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

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

## **Visits to [www.visitvictoria.com](http://www.visitvictoria.com) - Nov 09 on Oct 09**

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

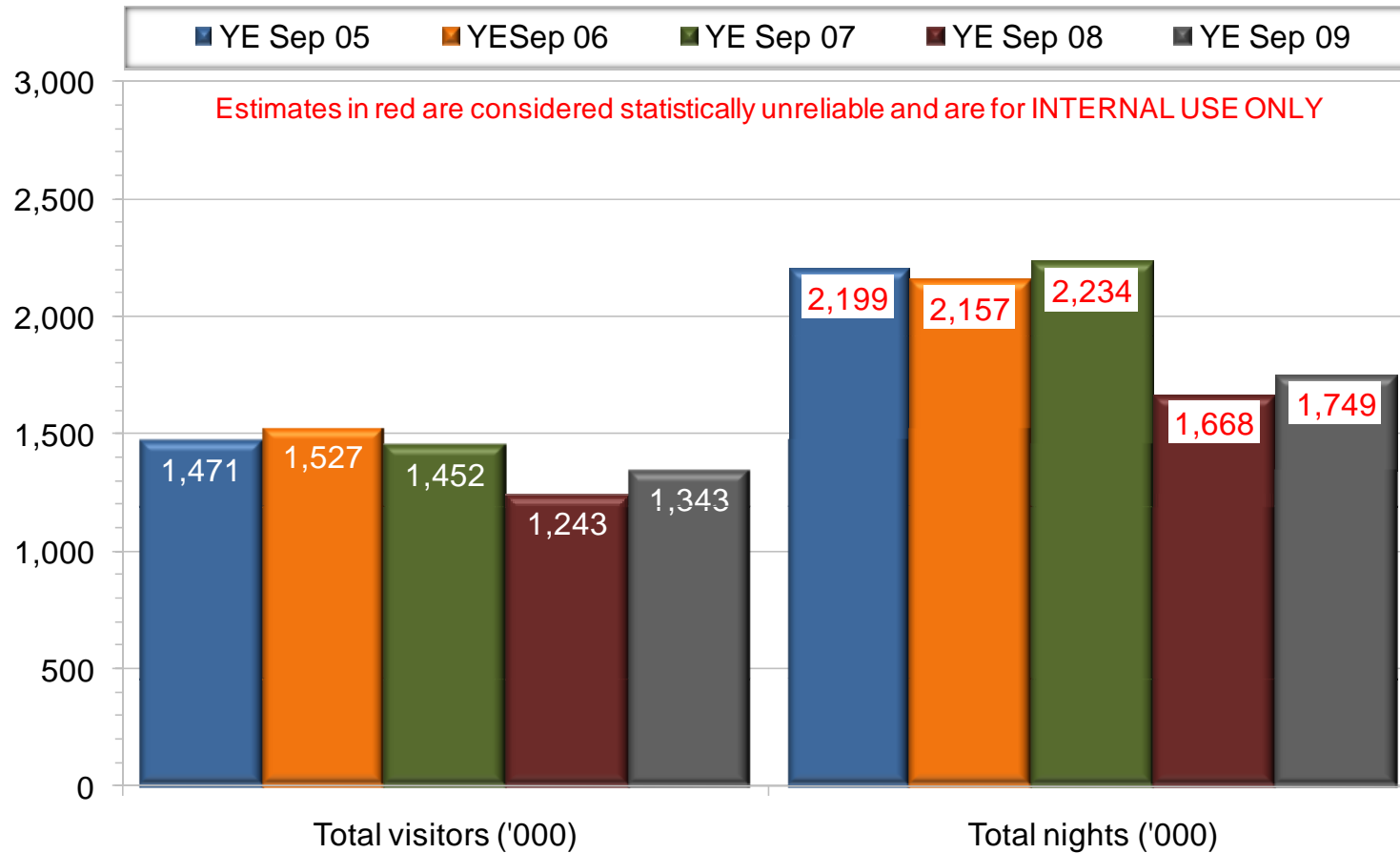
# Total Travel

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 Sep 09, the Grampians received over 1.3 million **visitors** - up by 8.0% on YE Sep 08, but down by 8.7% on YE Sep 05.
- Visitors spent **over 1.7 million nights** in the region.

# International Travel

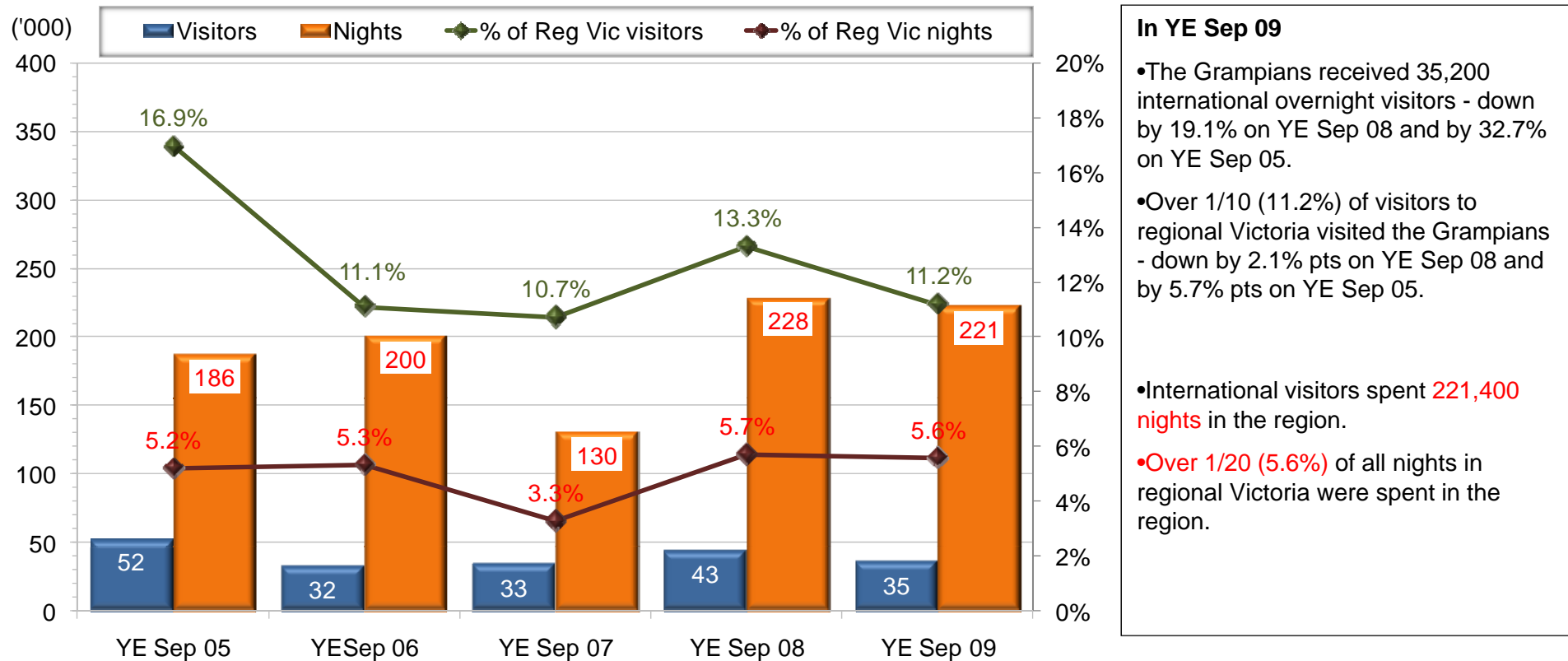
Overnight travel **to** the Grampians by international visitors aged 15 and over.

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

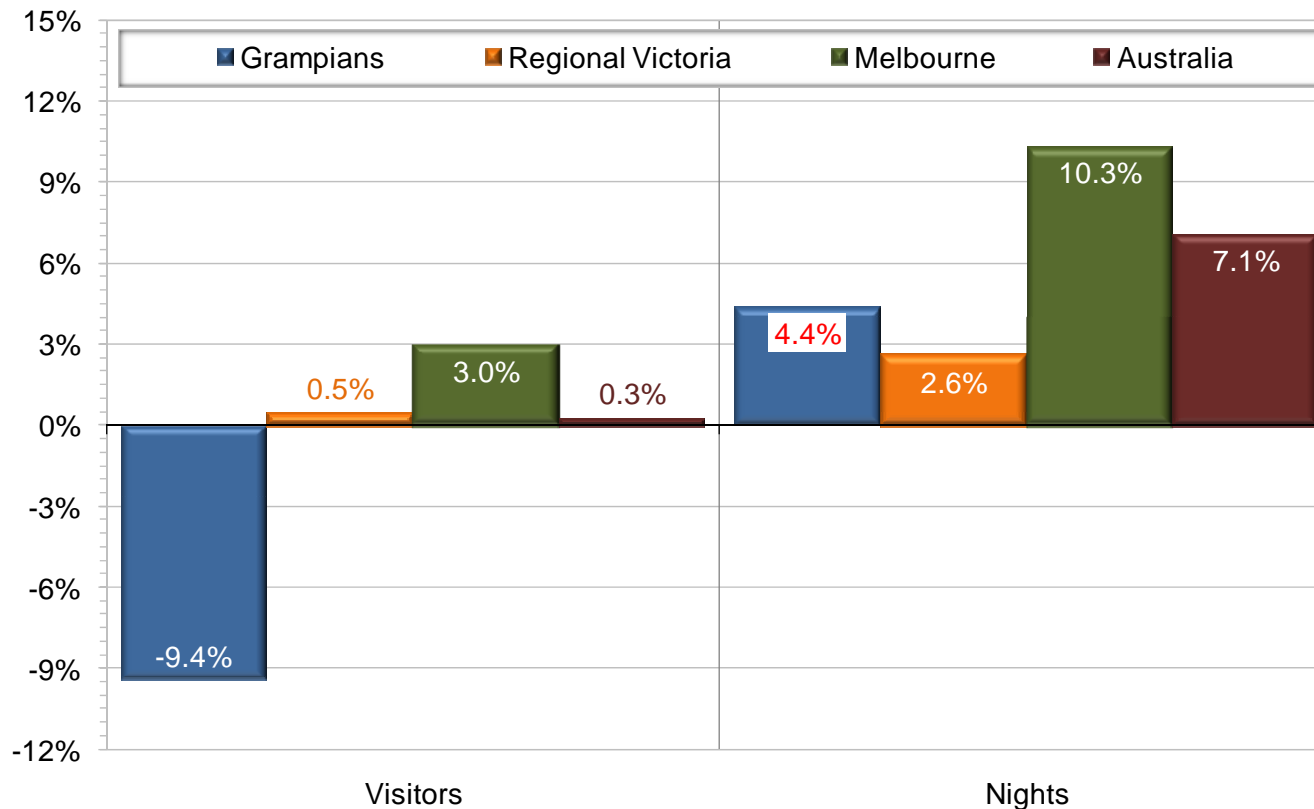


**In YE Sep 09**

- The Grampians received 35,200 international overnight visitors - down by 19.1% on YE Sep 08 and by 32.7% on YE Sep 05.
- Over 1/10 (11.2%) of visitors to regional Victoria visited the Grampians - down by 2.1% pts on YE Sep 08 and by 5.7% pts on YE Sep 05.
- International visitors spent 221,400 nights in the region.
- Over 1/20 (5.6%) 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

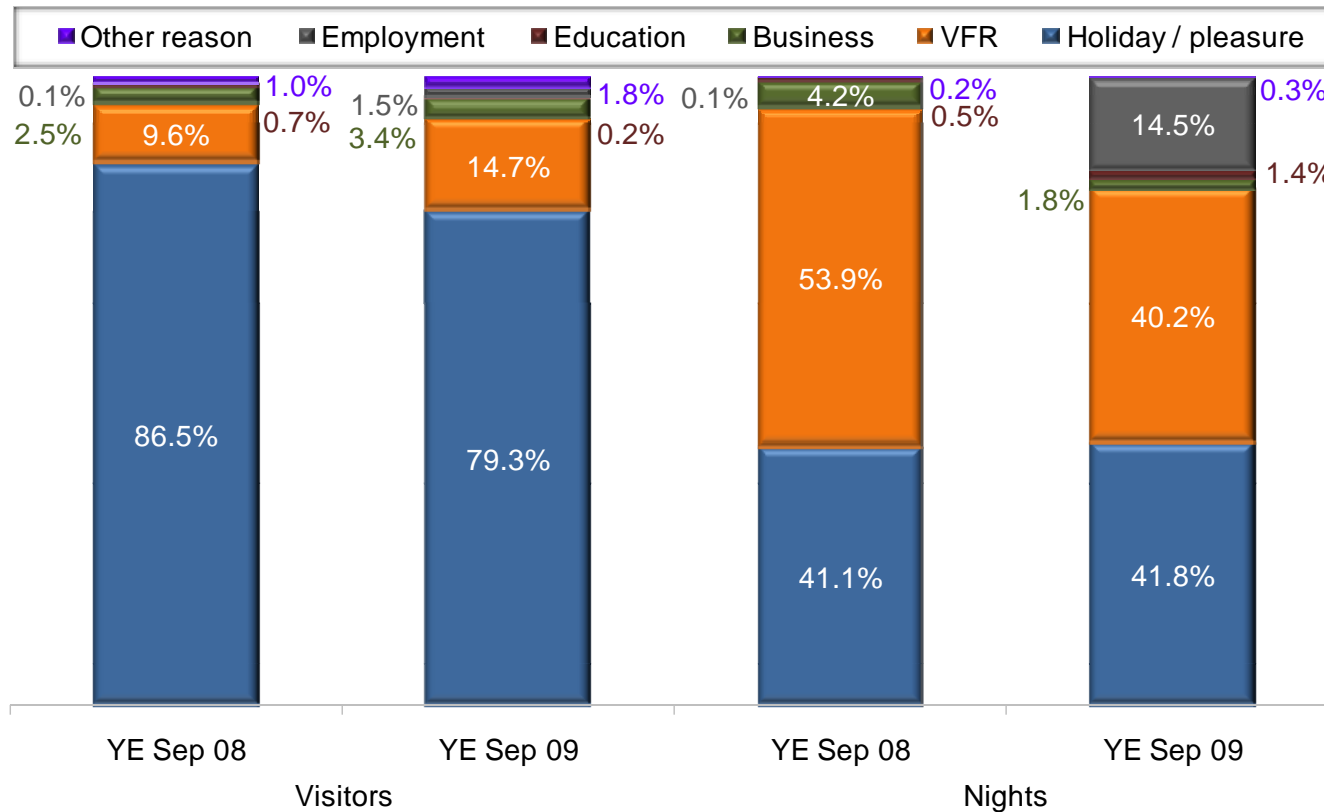


### YE Sep 05 to YE Sep 09

- Over the period, the Grampians had an average annual decline of 9.4% 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 4.4% 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 Sep 09

- ‘Holiday / pleasure’ (79.3%) was the most popular purpose for international overnight **visitors** to the Grampians – down by 7.3% points on YE Sep 08.

- ‘VFR’ or ‘visiting friends and relatives’ (14.7%) was the 2<sup>nd</sup> most popular – up by 5.1% points on YE Sep 08.

- ‘Business’ (3.4%) was the 3<sup>rd</sup> most popular – up by 0.9% points on YE Sep 08.

- ‘Holiday / pleasure’ (41.8%) was the most popular purpose in terms of international visitor **nights** in the Grampians.

- ‘VFR’ or ‘visiting friends and relatives’ (40.2%) was the 2<sup>nd</sup> most popular.

- ‘Employment’ (14.5%) was the 3<sup>rd</sup> most popular.

## Origin of visitors

Share of total visitors					
Origin	YE Sep 05	YESep 06	YE Sep 07	YE Sep 08	YE Sep 09
New Zealand	8.8%	10.5%	12.8%	11.0%	10.4%
Asia	10.7%	7.2%	9.0%	7.7%	9.4%
USA	5.3%	6.4%	7.5%	10.1%	5.9%
Canada	5.3%	5.1%	2.6%	5.1%	5.7%
United Kingdom	18.2%	23.4%	21.9%	22.6%	22.2%
Germany	20.5%	16.2%	11.7%	17.4%	15.6%
Scandinavia	5.0%	3.8%	5.5%	3.5%	3.9%
Netherlands	5.7%	6.7%	8.7%	4.8%	7.1%
Switzerland	4.5%	4.3%	4.6%	3.0%	4.9%
Other Europe	14.3%	11.5%	10.7%	12.4%	10.0%
Other Countries	1.7%	5.0%	5.0%	2.3%	5.0%

- **In YE Sep 09**, United Kingdom (22.2%) remained the largest individual source market of international overnight visitors to the Grampians – down by 20.4% on the YE Sep 08. UK's share of international visitors to the region was down by 0.4% points over the same period.
- Germany (15.6%) was the 2<sup>nd</sup> largest source market – down by 27.4% and by 1.8% points on YE Sep 08.
- New Zealand (10.4%) 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

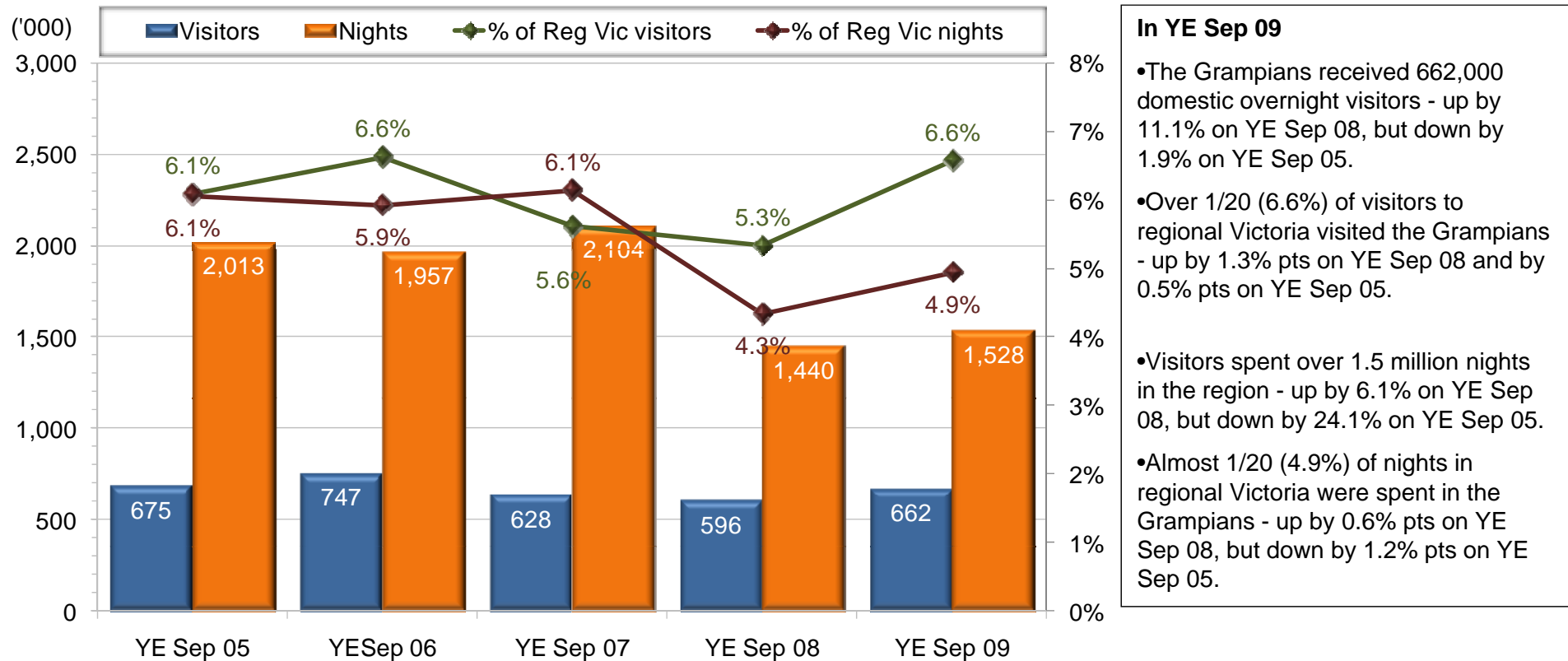
Overnight travel **to** the Grampians by Australian residents aged 15 and over.

PLEASE NOTE:

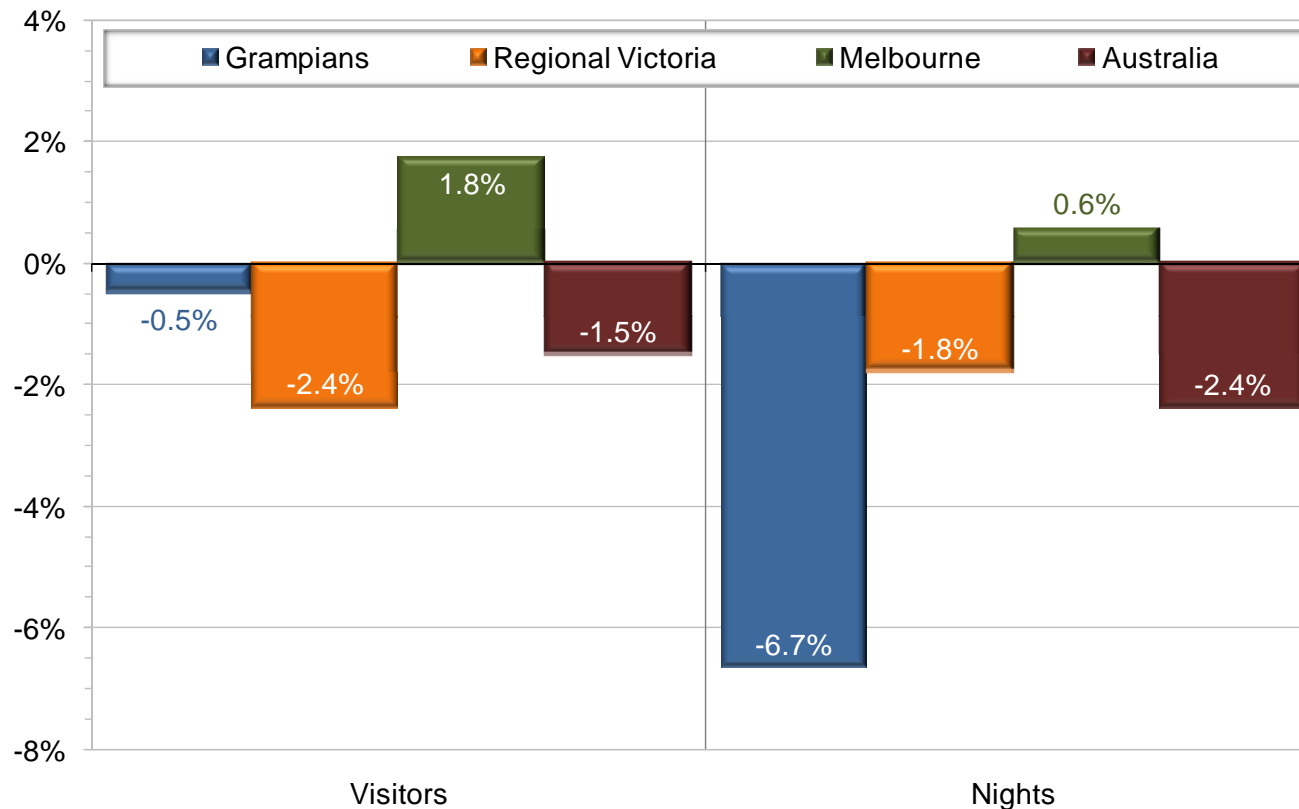
The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the NVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

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



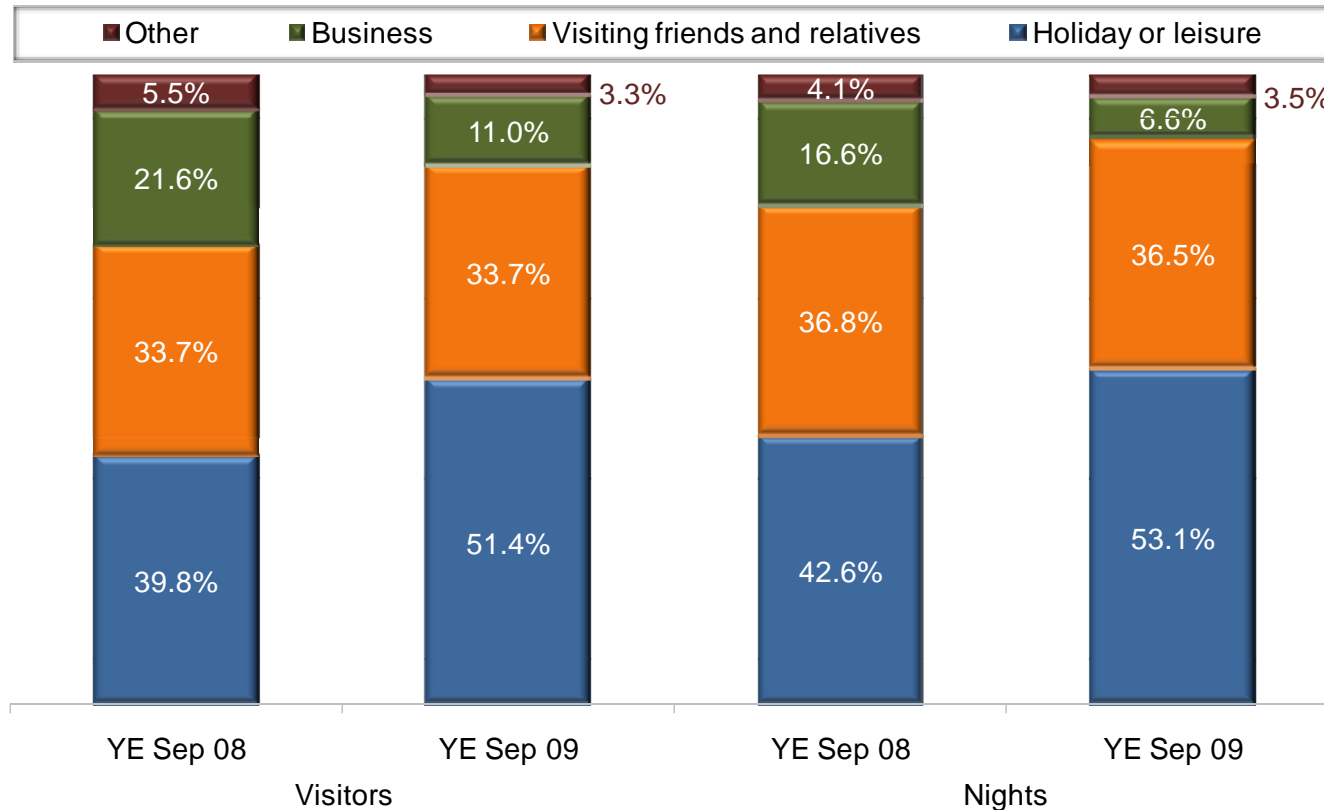
# Average annual growth for selected destinations



## YE Sep 05 to YE Sep 09

- Over the period, the Grampians had an average annual decline of 0.5% in domestic overnight **visitors**.
- The Grampians had a lower decline than regional Victoria and Australia. Melbourne experienced growth.
- The Grampians had an average annual decline of 6.7% in domestic visitor **nights** over the period.
- The Grampians had a higher decline than regional Victoria and Australia. Melbourne experienced growth.

# Purpose of visit



## In YE Sep 09

- ‘Holiday or leisure’ (51.4%) was the most popular purpose for domestic overnight **visitors** to the Grampians – up by 11.6% points on YE Sep 08.
- ‘Visiting friends and relatives’ (33.7%) was the 2<sup>nd</sup> most popular – unchanged on YE Sep 08.
- ‘Business’ (11.0%) was the 3<sup>rd</sup> most popular – down by 10.6% points on YE Sep 08.
- ‘Holiday or leisure’ (53.1%) was the most popular purpose in terms of domestic **nights** in the Grampians – up by 10.5% points on YE Sep 08.
- ‘Visiting friends and relatives’ (36.5%) was the 2<sup>nd</sup> most popular – down by 0.3% points on YE Sep 08.
- ‘Business’ (6.6%) was the 3<sup>rd</sup> most popular – down by 10.0% points on YE Sep 08.

## Origin of visitors and nights

Share of total visitors						Share of total nights					
Origin	YE Sep 05	YESep 06	YE Sep 07	YE Sep 08	YE Sep 09	Origin	YE Sep 05	YESep 06	YE Sep 07	YE Sep 08	YE Sep 09
Regional Victoria	35.4%	42.0%	37.4%	47.8%	39.6%	Regional Victoria	28.3%	36.8%	23.9%	45.3%	35.3%
Melbourne	39.0%	33.6%	37.7%	27.3%	36.7%	Melbourne	33.8%	34.0%	29.1%	27.0%	35.7%
Total intrastate	74.4%	75.6%	75.0%	75.3%	76.3%	Total intrastate	62.1%	70.9%	52.9%	72.3%	71.0%
NSW	5.5%	6.3%	4.3%	4.0%	4.8%	NSW	6.1%	10.0%	3.6%	6.0%	6.2%
Queensland	1.3%	3.6%	2.4%	3.9%	0.5%	Queensland	13.6%	3.0%	31.2%	3.9%	0.4%
SA	15.4%	11.4%	15.3%	15.6%	15.9%	SA	14.4%	11.2%	9.3%	16.6%	17.3%
WA	1.2%	0.9%	1.1%	0.2%	0.9%	WA	0.6%	0.9%	1.5%	0.2%	1.7%
Tasmania	0.9%	0.9%	1.3%	0.5%	0.5%	Tasmania	1.0%	1.2%	1.0%	0.3%	0.4%
NT	0.1%	0.5%	0.3%	0.2%	0.5%	NT	0.8%	0.5%	0.4%	0.1%	2.5%
ACT	1.0%	0.8%	0.2%	0.3%	0.8%	ACT	1.4%	2.4%	0.0%	0.6%	0.6%
Total interstate	25.6%	24.4%	25.0%	24.8%	23.7%	Total interstate	37.9%	29.1%	47.1%	27.8%	29.1%

• **In YE Sep 09**, the Grampians received over  $\frac{3}{4}$  (76.3%) of **visitors** from Victoria - up by 12.5% on YE Sep 08. Victoria's contribution to visitors was up by 1.0% point over the same period. Compared to YE Sep 08, visitors from regional Victoria declined by 8.1% while visitors from Melbourne increased by 49.1%.

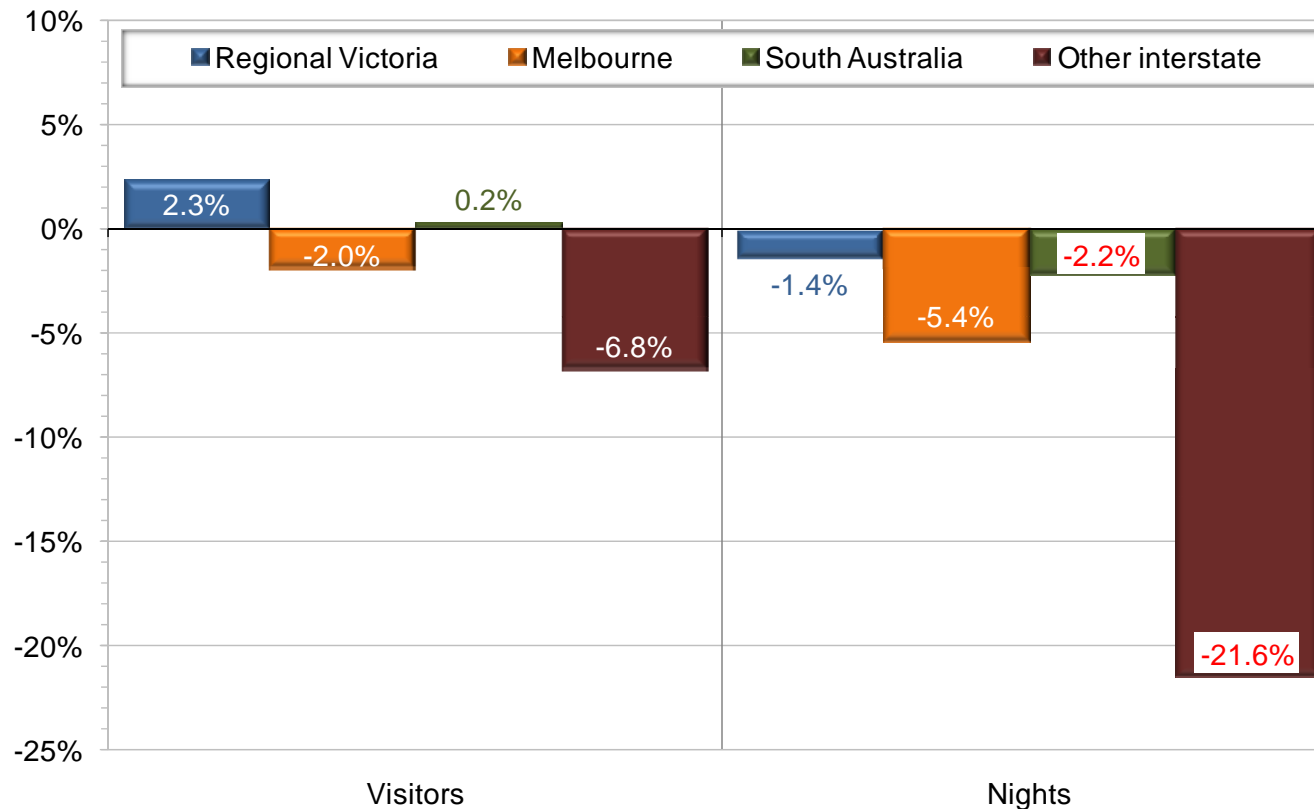
• Nearly  $\frac{1}{4}$  (23.7%) of visitors came from interstate – up by 6.1%, but down by 1.1% points on YE Sep 08. South Australia (15.9%) was the largest market of interstate visitors – up by 12.9% on YE Sep 08.

• The Grampians received nearly  $\frac{3}{4}$  (71.0%) of visitor **nights** from Victoria - up by 4.2% on YE Sep 08. Victoria's contribution to visitors was down by 1.3% points over the same period. Compared to YE Sep 08, visitor nights by regional Victorians declined by 17.3% while nights by Melburnians increased by 40.4%.

• Nearly  $\frac{3}{10}$  (29.1%) of nights were from interstate. South Australia (17.3%) 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 Sep 05 to YE Sep 09

- Over the period, the Grampians had an average annual growth in domestic **visitors** from regional Victoria and South Australia, while a decline from Melbourne and other interstate.
- Visitors from regional Victoria (2.3%) had the highest average growth, while other interstate had the highest decline (6.8%).
- The Grampians had an average annual decline in domestic visitor **nights** from the selected origins over the period.
- Nights by **Other interstate visitors (21.6%)** had the highest decline.
- Nights by regional Victorians (1.4%) experienced the lowest decline.

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

# Domestic Daytrips

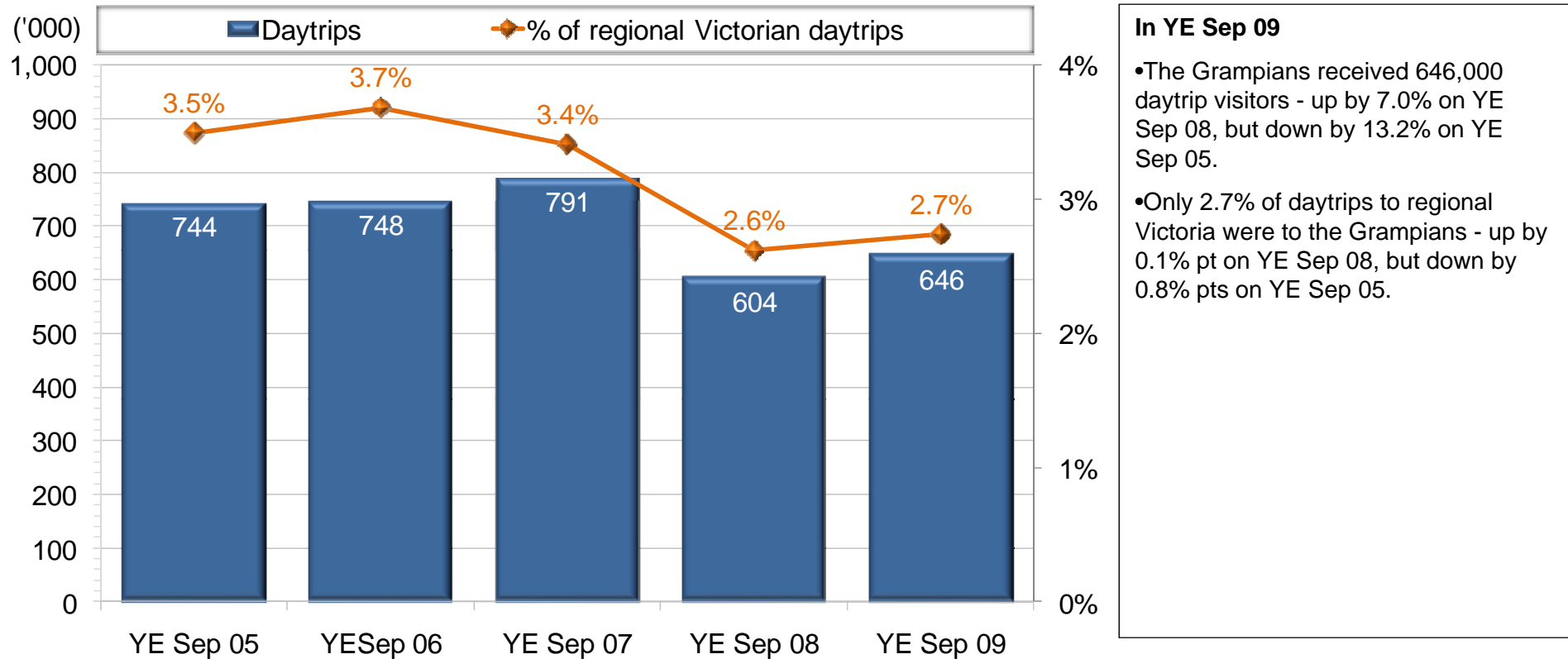
Daytrips **to** the Grampians by Australian residents aged 15 and over.

PLEASE NOTE:

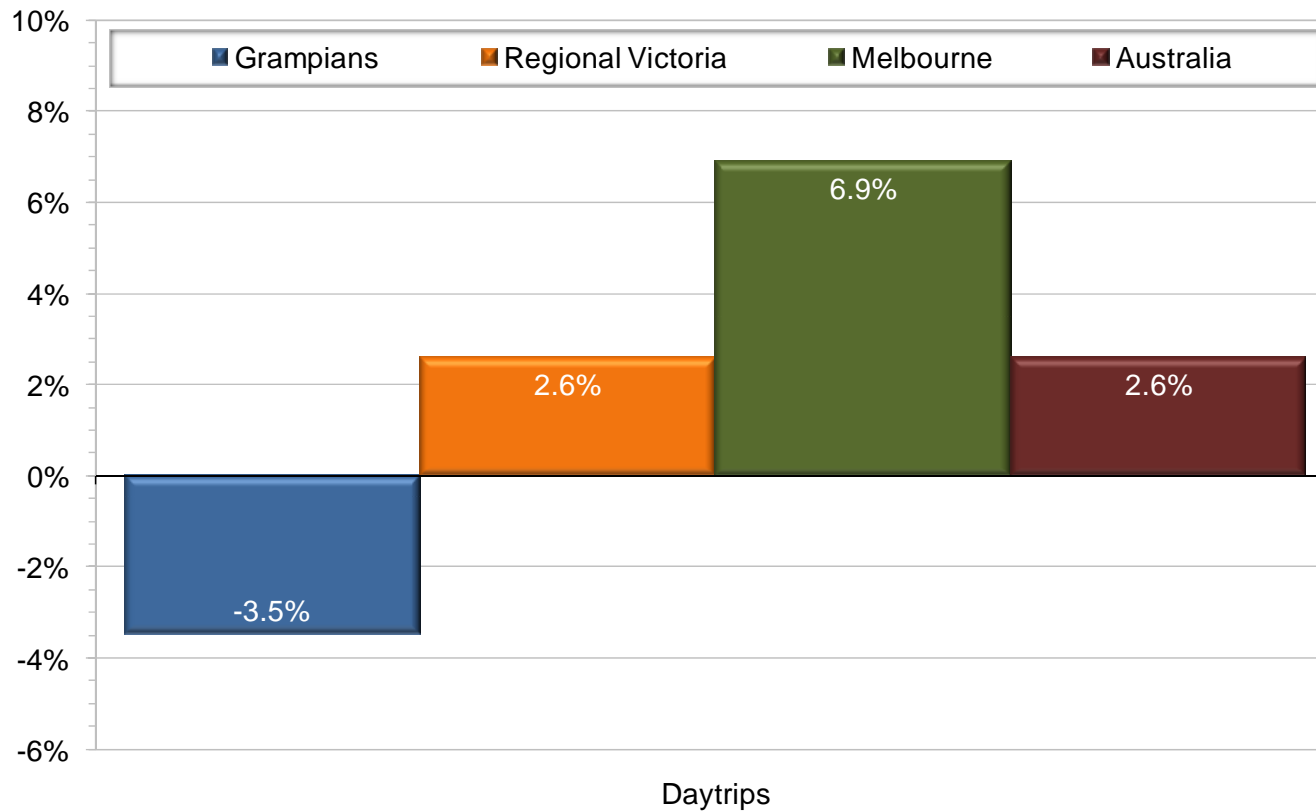
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# Daytrips and market share



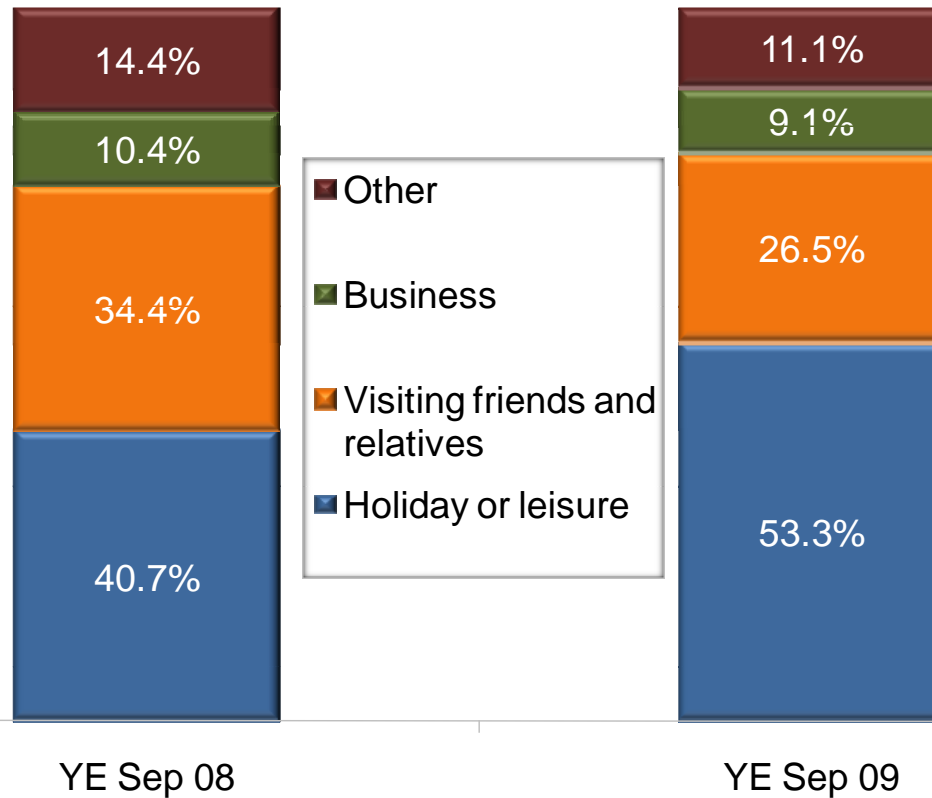
# Average annual growth for selected destinations



## YE Sep 05 to YE Sep 09

- Over the period, the Grampians had an average annual decline of 3.5% in domestic daytrips.
- While the Grampians had a decline, regional Victoria, Melbourne and Australia experienced growth.

# Main purpose of trip



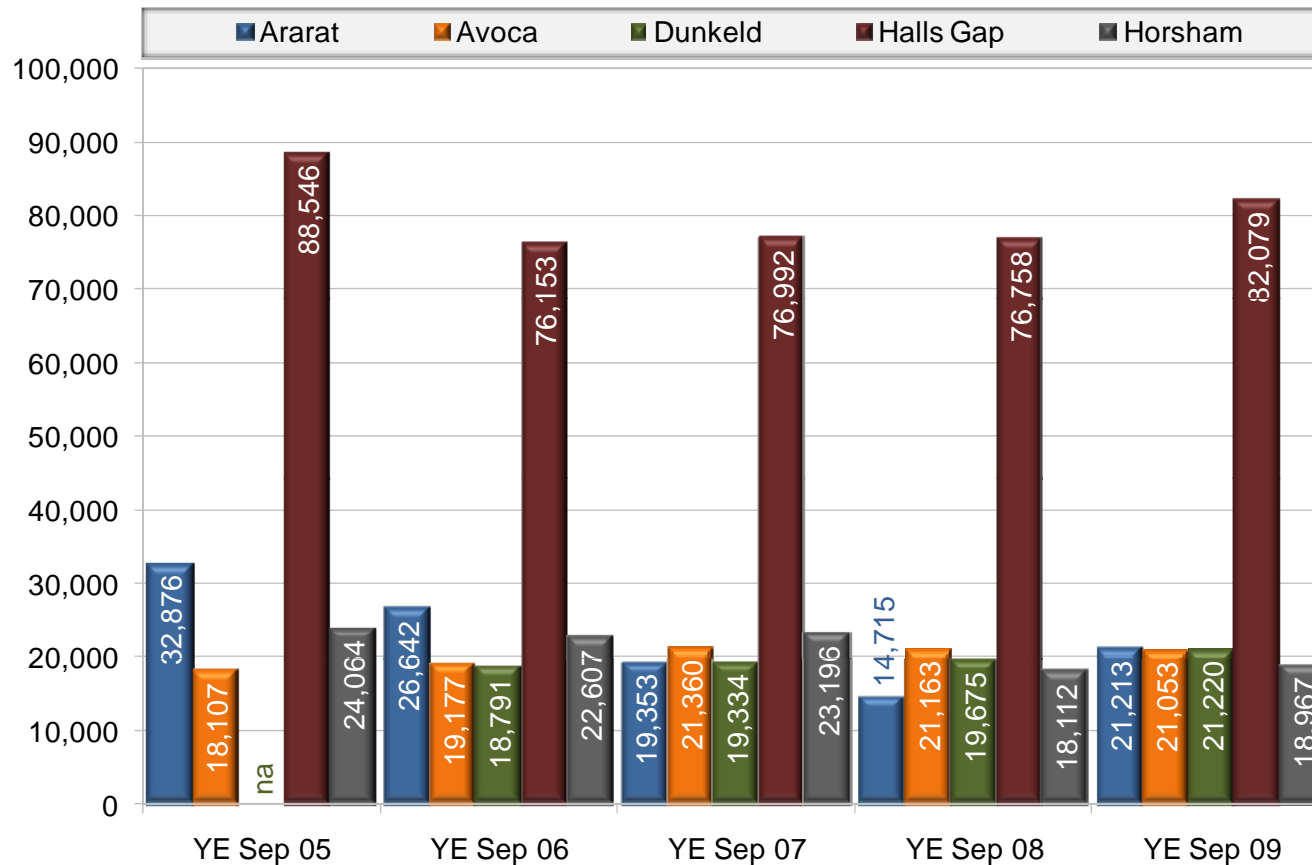
### YE Sep 09

- 'Holiday or leisure' (53.3%) was the most popular purpose for domestic daytrips to the Grampians – up by 12.5% points on YE Sep 08.
- 'Visiting friends and relatives' (26.5%) was the 2<sup>nd</sup> most popular – down by 8.0% points on YE Sep 08.
- 'Business' (9.1%) was the 3<sup>rd</sup> most popular – down by 1.3% points on YE Sep 08.

# Visitor Information Centres

Visitors to selected Visitor Information Centres in the Grampians

# Visitation to selected VICs



### In YE Sep 09

- Ararat VIC received 21,213 visitors – up by 44.2% on YE Sep 08, but down by 35.5% on YE Sep 05. In the period YE Sep 05 to YE Sep 09, the VIC had an average annual decline of 10.4%.

- There were 21,053 visitors to the Avoca VIC - down by 0.5% on YE Sep 08, but up by 16.3% on YE Sep 05. In the period YE Sep 05 to YE Sep 09, the VIC had an average annual growth of 3.8%.

- Dunkeld VIC received 21,220 visitors - up by 7.9% on YE Sep 08.

- There were 82,079 visitors to Halls Gap VIC - up by 6.9% on YE Sep 08, but down by 7.3% on YE Sep 05. In the period YE Sep 05 to YE Sep 09, the VIC had an average annual decline of 1.9%.

- Horsham VIC received 18,967 visitors - up by 4.7% on YE Sep 08, but down by 21.2% on YE Sep 05. In the period YE Sep 05 to YE Sep 09, the VIC had an average annual decline of 5.8%.

# 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	na	na	na	na	-11.1%	na
Page views ('000)	241.4	261.7	196.8	205.2	190.7	200.3	209.4	198.3	169.2	na	na	na	na	-14.7%	na
Average page views	11.3	12.1	12.1	9.8	11.2	10.9	11.0	11.0	10.6	na	na	na	na	-4.1%	na
Time on site	10.09	10.27	10.40	8.20	9.31	9.35	9.33	9.42	9.21	na	na	na	na	-2.2%	na
New visits	56.4%	54.3%	55.7%	59.3%	58.6%	59.1%	65.8%	65.1%	66.0%	na	na	na	na	0.9	na

• **In Nov 09**, there were 15,966 visits to “Grampians” on [www.visitvictoria.com](http://www.visitvictoria.com) - down by 11.1% on Oct 09. Over the previous nine months, “Grampians” received the highest number of visits in Apr 09 (21,606).

• “Grampians” visitors viewed 169,216 pages in Nov 09 - down by 14.7% on Oct 09. In the period Mar 09 to Nov 09, visitors viewed the highest number of pages in Apr 09 (261,654).

• In Nov 09, “Grampians” visitors viewed on average 10.6 pages - down by 4.1% on Oct 09. Over the previous nine months, Apr 09 and May 09 (12.1 pages each) had the highest average number of pages viewed.

• “Grampians” visitors spent 9 minutes and 21 seconds on the site in Nov 09 - down by 2.2% on Oct 09. In the period Mar 09 to Nov 09, visitors spent the longest amount of time on site in May 09 (10 minutes and 40 seconds).

• In Nov 09, “Grampians” received 66.0% new visitors - up by 0.9% points on Oct 09. Over the previous nine months, Nov 09 (66.0%) 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 80,000 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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