

# Travel to the Grampians

Year ended June 2010

Quarterly tracking of selected measures

Prepared for Grampians Tourism

September 2010

# Background

- This report provides results from selected measures of travel to the Grampians campaign region for the year ended June 2010.
  - The region comprises: the Western Grampians, Central Highlands and Wimmera tourism regions.
- 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 June 2006 to year ended June 2010 has been used. In addition, monthly visits to [www.visitvictoria.com](http://www.visitvictoria.com) for August 2009 to August 2010 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 Jun 10 on YE Jun 09**

- Visitors increased by 13.4% to nearly 1.5 million.
- Visitors spent **over 1.7 million nights** in the region.

## **International overnight travel to the Grampians - YE Jun 10 on YE Jun 09**

- Visitors decreased by 6.6% to 32,700.
- Visitors spent **146,900 nights** spent in the region
- In the period YE Jun 06 to YE Jun 10: visitors to the region experienced an average annual decline of 0.5%.

## **Domestic overnight travel to the Grampians - YE Jun 10 on YE Jun 09**

- Visitors decreased by 9.2% to 570,000.
- Nights increased by 5.4% to nearly 1.6 million.
- In the period YE Jun 06 to YE Jun 10: both visitors (-5.9%) and nights (-5.3%) 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 Jun 10 on YE Jun 09**

- Daytrip visitors increased by 37.7% to 848,000.
- In the period YE Jun 06 to YE Jun 10: daytrips to the region experienced average annual growth of 3.0%.

## **Visits to selected VICs in the Grampians - YE Jun 10 on YE Jun 09**

- Visitors increased to Dunkeld, Halls Gap and Horsham, while Ararat and Avoca had a decrease.
- In the period YE Jun 06 to YE Jun 10: Avoca, Dunkeld and Halls Gap experienced average annual growth in visitors, while Ararat and Horsham had a decline.

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

- 'Visits' and 'page views' increased, while 'average page views' and 'time on site' decreased.

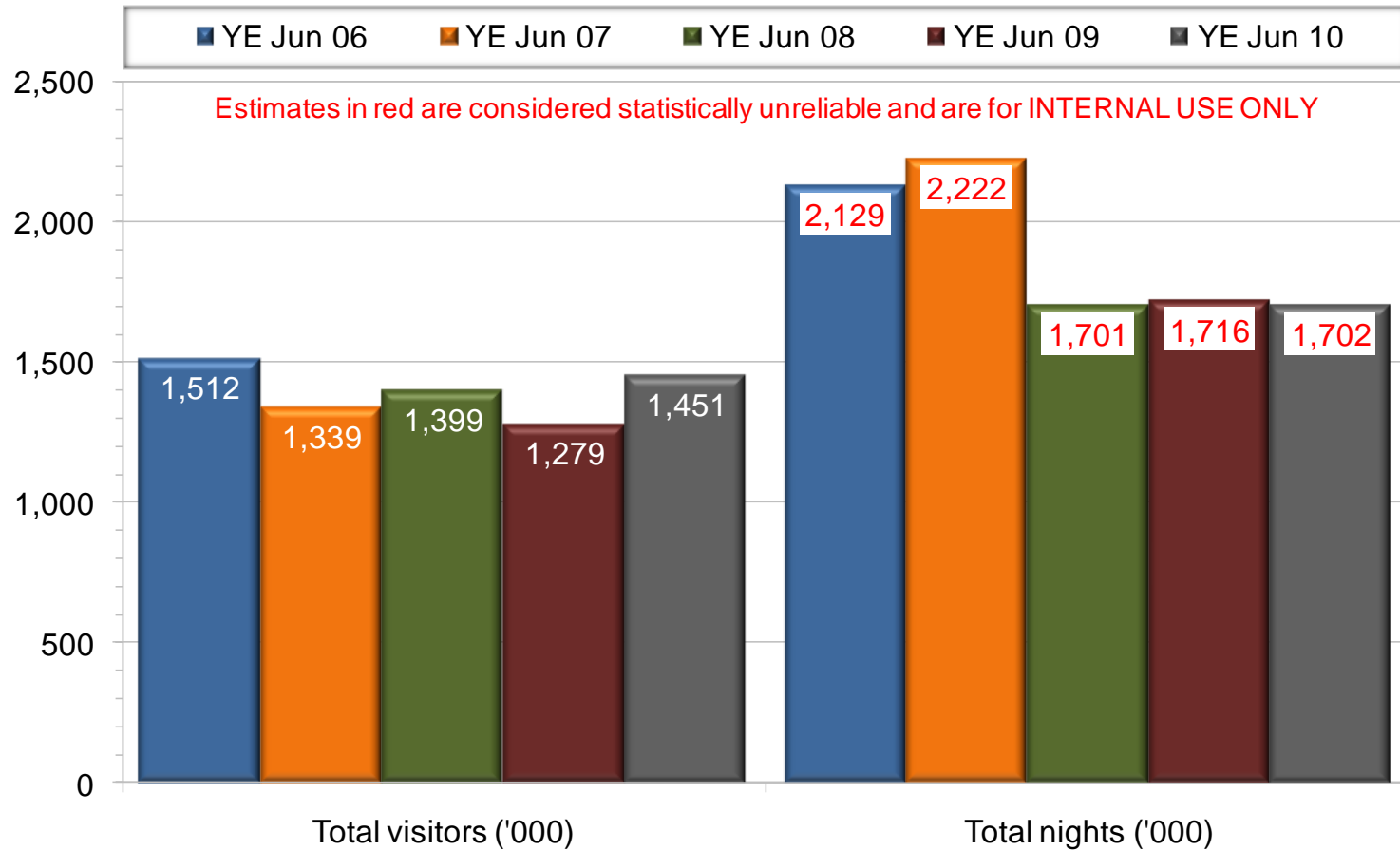
# Total Travel

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 Jun 10, the Grampians received nearly 1.5 million **visitors** - up by 13.4% on YE Jun 09, but down by 4.1% on YE Jun 06.
- Visitors spent **over 1.7 million nights** in the region.

# International Travel

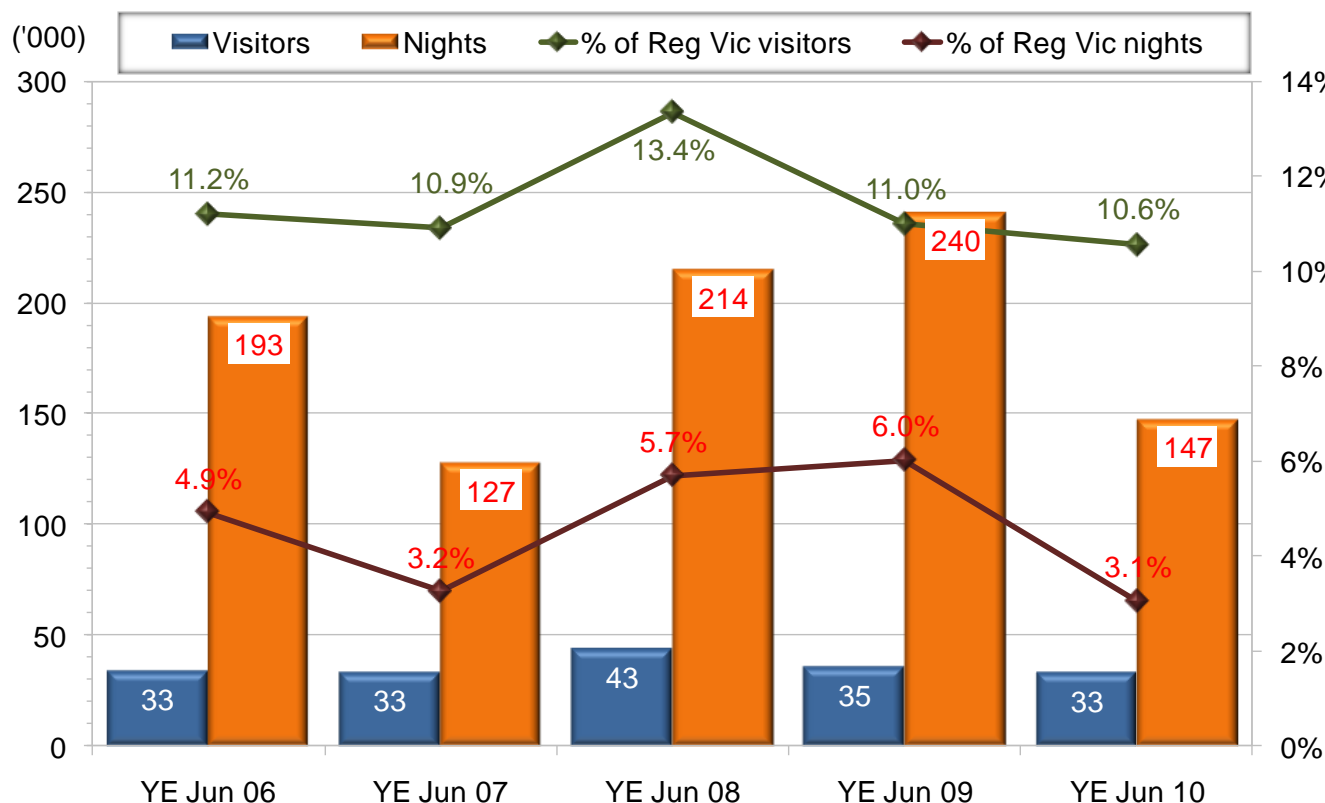
Overnight travel **to** the Grampians by international visitors aged 15 and over.

## PLEASE NOTE:

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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

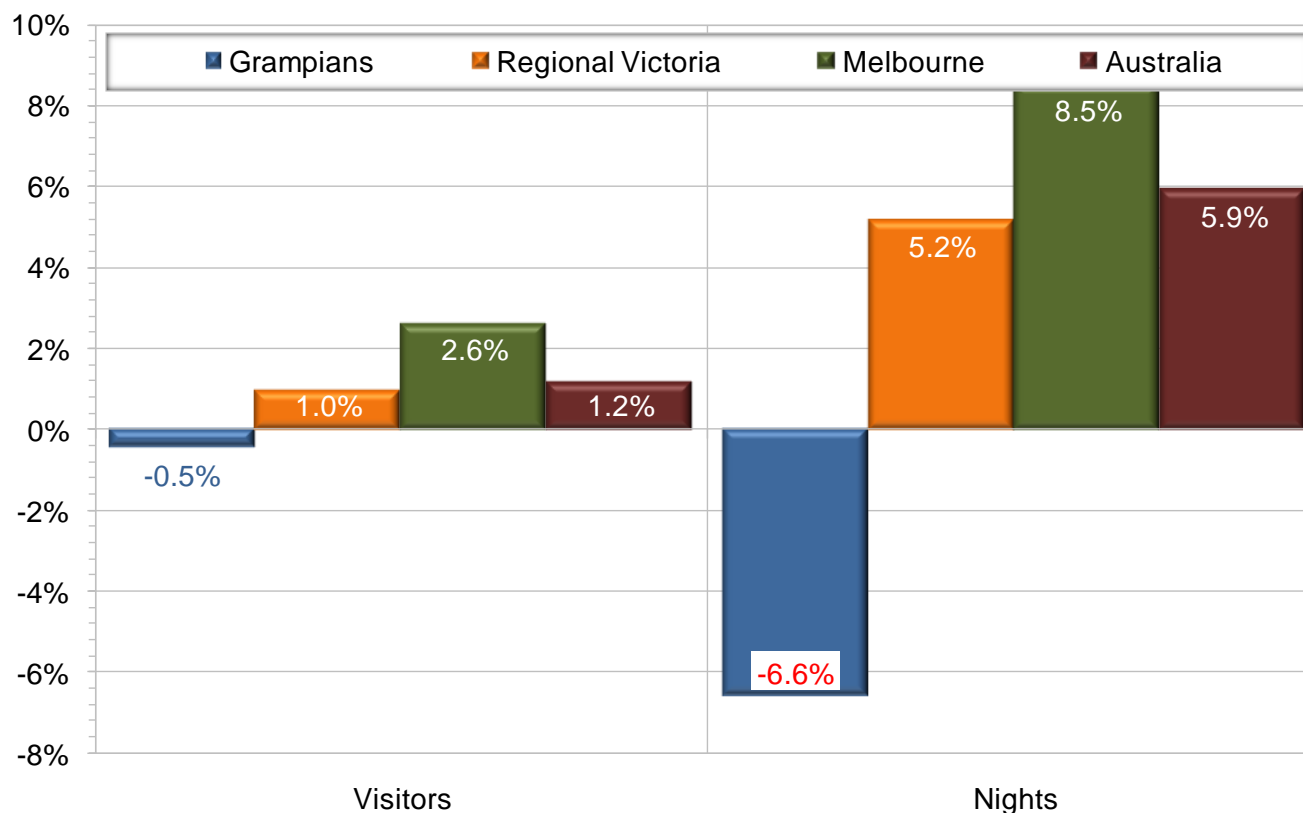


### In YE Jun 10

- The Grampians received 32,700 international overnight visitors - down by 6.6% on YE Jun 09 and by 1.9% on YE Jun 06.
- Over 1/10 (10.6%) of visitors to regional Victoria visited the Grampians - down by 0.4% pts on YE Jun 09 and by 0.6% pts on YE Jun 06.
- International visitors spent 146,900 nights in the region.
- Only 3.1% 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 Jun 06 to YE Jun 10

- Over the period, the Grampians had an average annual decline of 0.5% in international overnight **visitors**.

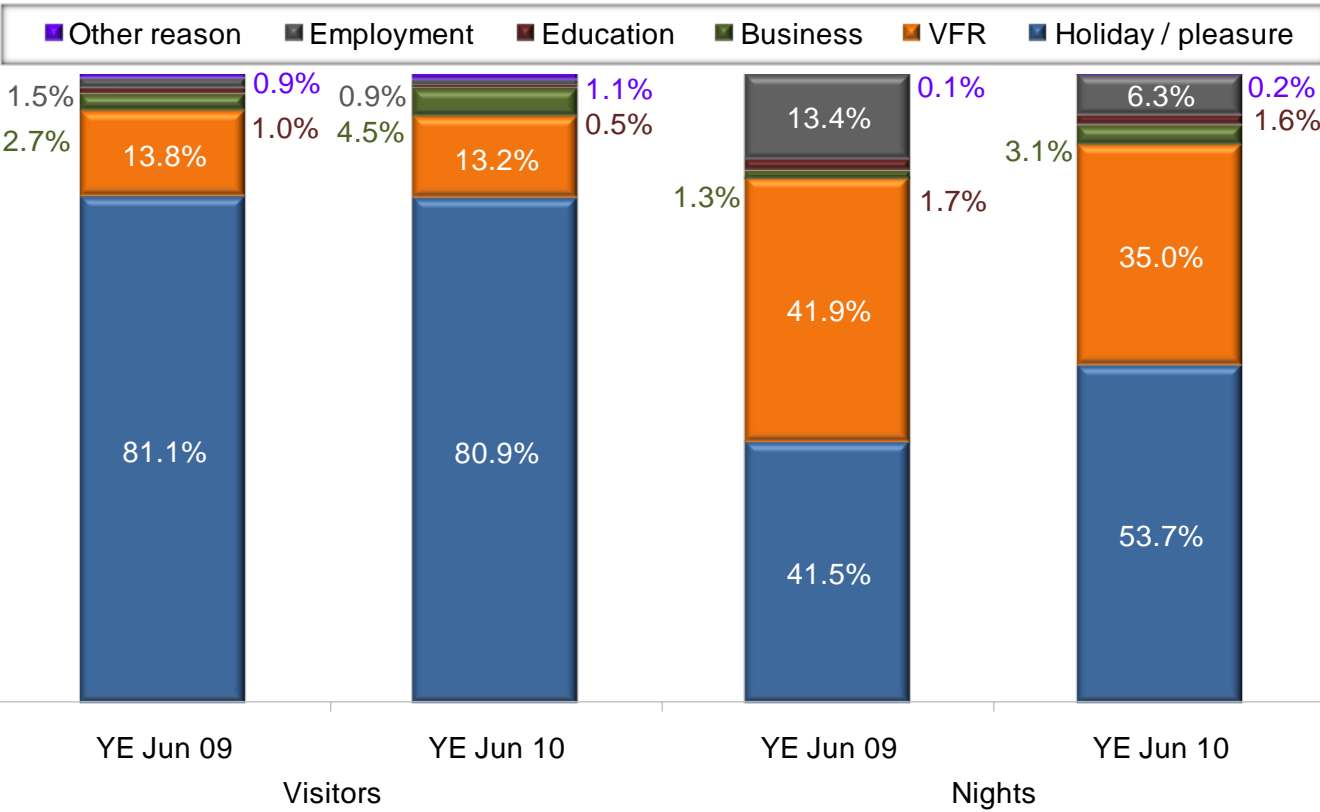
- While the Grampians had a decline, regional Victoria, Melbourne and Australia experienced growth.

- The Grampians had an average annual decline of 6.6% 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 Jun 10**

- ‘Holiday / pleasure’ (80.9%) was the most popular purpose for international overnight **visitors** to the Grampians – down by 0.2% points on YE Jun 09.
- ‘VFR’ or ‘visiting friends and relatives’ (13.2%) was the 2<sup>nd</sup> most popular – down by 0.6% points on YE Jun 09.
- ‘Business’ (4.5%) was the 3<sup>rd</sup> most popular – up by 1.8% points on YE Jun 09.
- ‘Holiday / pleasure’ (53.7%) was the most popular purpose in terms of international visitor **nights** in the Grampians.
- ‘VFR’ (35.0%) was the 2<sup>nd</sup> most popular.
- ‘Employment’ (6.3%) was the 3<sup>rd</sup> most popular.

# Origin of visitors

Origin	Share of total visitors				
	YE Jun 06	YE Jun 07	YE Jun 08	YE Jun 09	YE Jun 10
New Zealand	13.7%	12.8%	10.3%	12.5%	3.7%
Asia	7.5%	9.0%	7.5%	10.3%	10.0%
USA	5.5%	7.2%	10.6%	5.8%	5.8%
Canada	5.0%	2.6%	4.0%	5.5%	5.2%
United Kingdom	22.5%	22.9%	22.5%	20.1%	22.3%
Germany	17.4%	12.5%	15.8%	17.1%	18.5%
Scandinavia	3.0%	4.5%	5.1%	3.9%	2.6%
Netherlands	6.2%	9.0%	5.1%	5.8%	7.6%
Switzerland	3.9%	4.3%	3.8%	4.9%	6.5%
Other Europe	9.9%	11.1%	12.7%	10.2%	11.2%
Other Countries	5.5%	4.0%	2.6%	4.0%	6.4%

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

- **In YE Jun 10**, United Kingdom (22.3%) remained the largest individual source market of international overnight visitors to the Grampians – up by 3.7% on the YE Jun 09. UK's share of international visitors to the region was up by 2.2% points over the same period.
- Germany (18.5%) was the 2<sup>nd</sup> largest source market – up by 1.5% and its share was up by 1.4% points on YE Jun 09.
- Other Europe (11.2%) 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

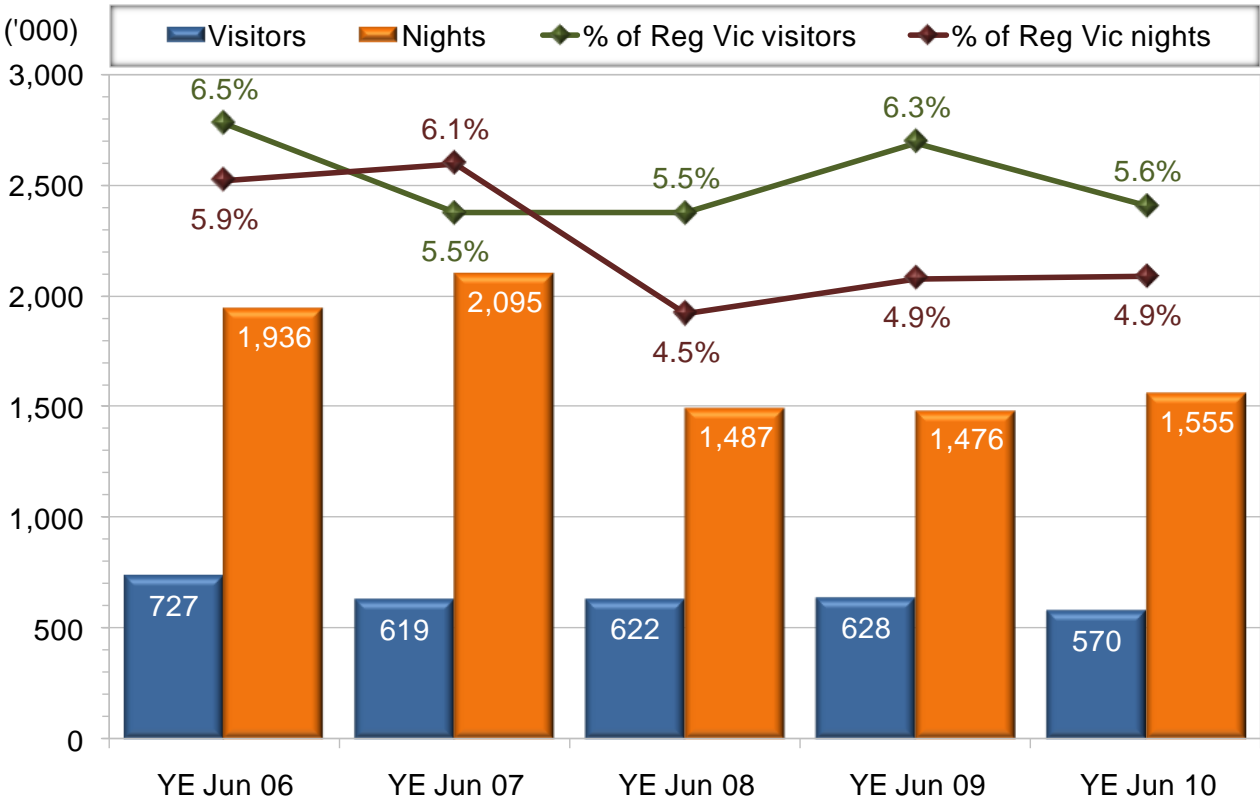
Overnight travel **to** the Grampians by Australian residents aged 15 and over.

## 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. 50,000 for visitors and 500,000 for nights. datainsights recommends that any such estimates should be for internal use only.

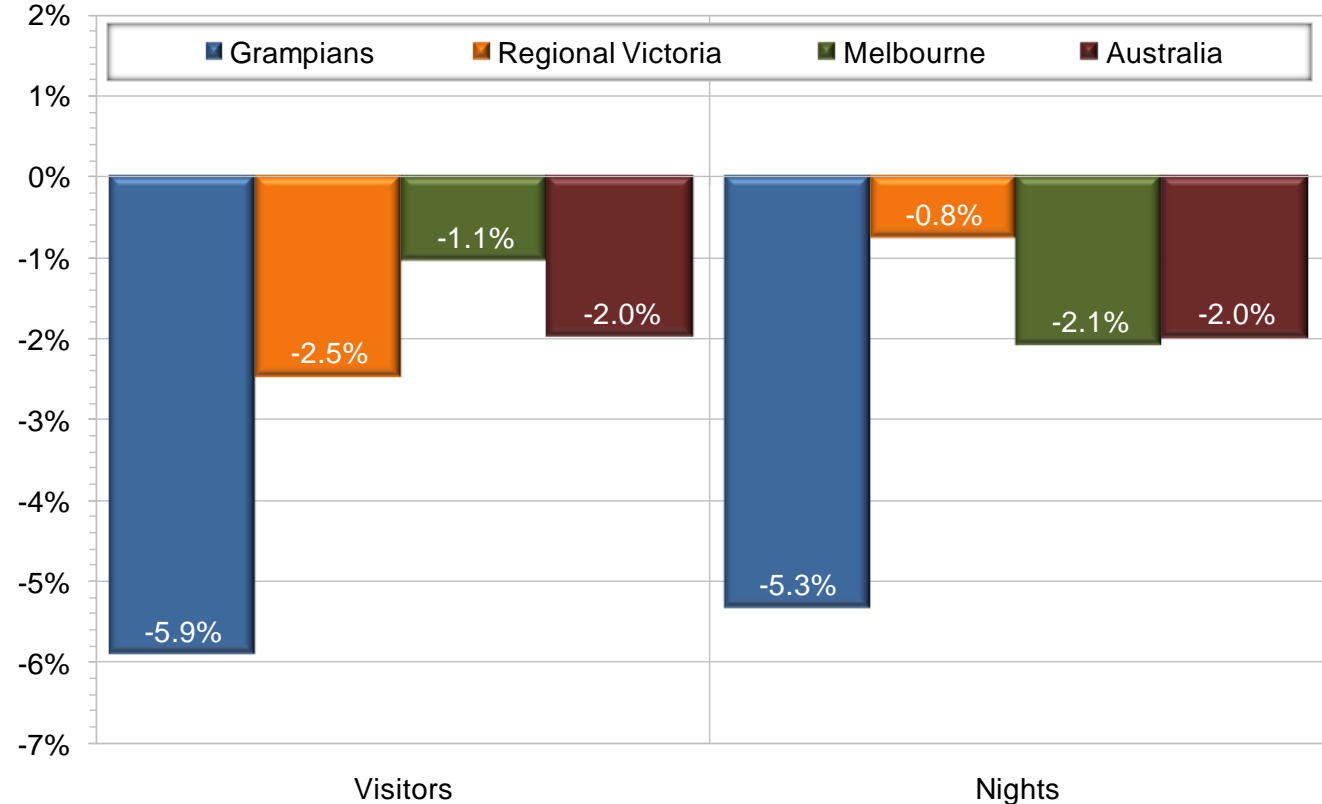
# Visitors, nights and market share



**In YE Jun 10**

- The Grampians received 570,000 domestic overnight visitors - down by 9.2% on YE Jun 09 and by 21.6% on YE Jun 06.
- Over 1/20 (5.6%) of visitors to regional Victoria visited the Grampians - down by 0.7% pts on YE Jun 09 and by 0.9% pts on YE Jun 06.
- Visitors spent nearly 1.6 million nights in the region - up by 5.4% on YE Jun 09, but down by 19.7% on YE Jun 06.
- Almost 1/20 (4.9%) of nights in regional Victoria were spent in the Grampians - unchanged on YE Jun 09, but down by 1.0% pt on YE Jun 06.

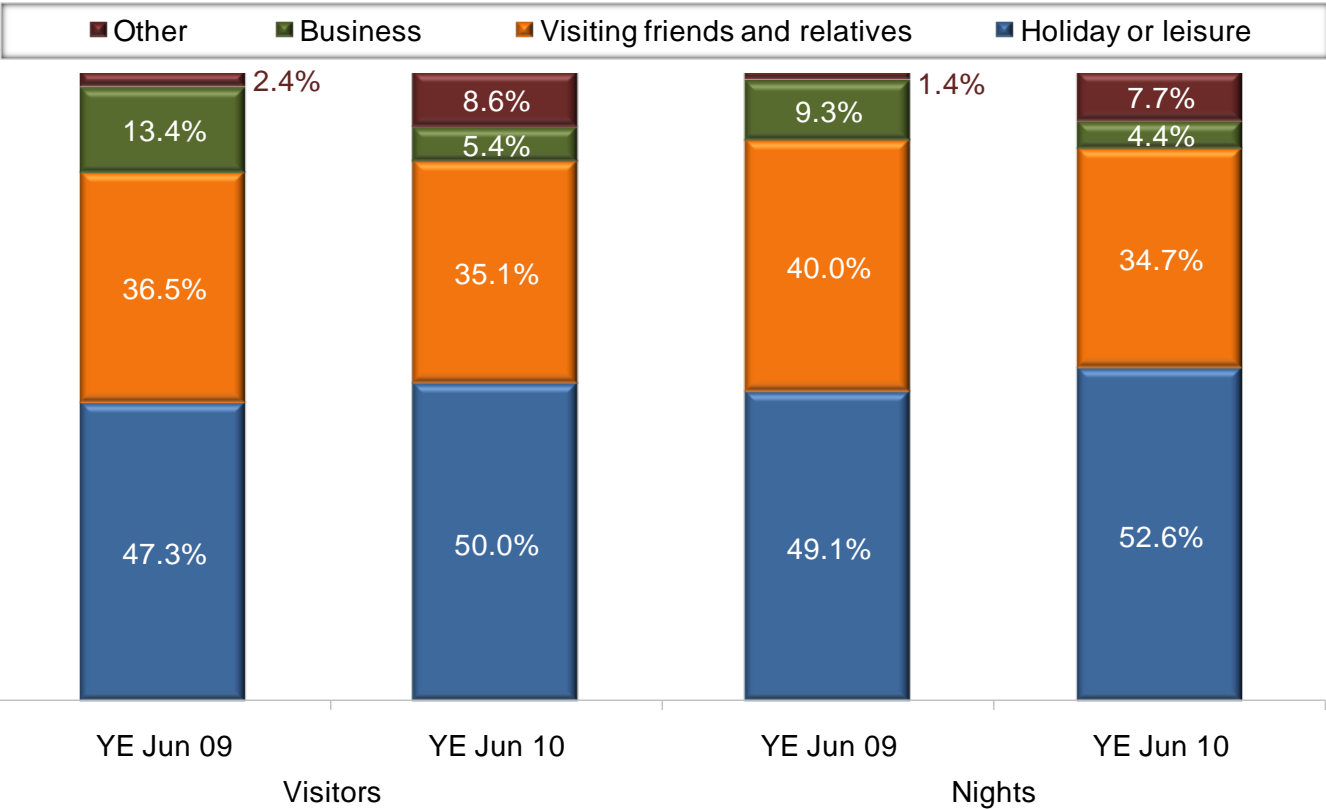
# Average annual growth for selected destinations



### YE Jun 06 to YE Jun 10

- Over the period, the Grampians had an average annual decline of 5.9% in domestic overnight **visitors**.
- The Grampians had a higher decline than regional Victoria, Melbourne and Australia.
- The Grampians had an average annual decline of 5.3% in domestic visitor **nights** over the period.
- The Grampians had a higher decline than regional Victoria, Melbourne and Australia.

# Purpose of visit



**In YE Jun 10**

- ‘Holiday or leisure’ (50.0%) was the most popular purpose for domestic overnight **visitors** to the Grampians – up by 2.7% points on YE Jun 09.
- ‘Visiting friends and relatives’ (35.1%) was the 2<sup>nd</sup> most popular – down by 1.4% pts on YE Jun 09.
- ‘Business’ (5.4%) was the 3<sup>rd</sup> most popular – down by 8.0% points on YE Jun 09.
- ‘Education’ (3.3%) was the biggest purpose in the composite ‘other’.
- “‘Holiday or leisure’ (52.6%) was the most popular purpose in terms of domestic **nights** in the Grampians – up by 3.5% points on YE Jun 09.
- ‘Visiting friends and relatives’ (34.7%) was the 2<sup>nd</sup> most popular – down by 5.3% points on YE Jun 09.
- ‘Business’ (4.4%) was the 3<sup>rd</sup> most popular – down by 4.9% points on YE Jun 09.
- ‘Education’ (4.1%) was the biggest purpose in the composite ‘other’

# Origin of visitors and nights

Share of total visitors						Share of total nights					
Origin	YE Jun 06	YE Jun 07	YE Jun 08	YE Jun 09	YE Jun 10	Origin	YE Jun 06	YE Jun 07	YE Jun 08	YE Jun 09	YE Jun 10
Regional Victoria	41.0%	37.0%	47.1%	39.8%	41.2%	Regional Victoria	35.8%	23.8%	43.5%	35.4%	35.6%
Melbourne	32.6%	38.4%	28.6%	37.4%	31.1%	Melbourne	33.2%	29.1%	30.3%	36.5%	26.2%
Total intrastate	73.6%	75.6%	75.7%	77.2%	72.3%	Total intrastate	69.1%	52.9%	73.8%	71.8%	61.9%
NSW	5.8%	5.2%	3.9%	4.8%	7.4%	NSW	9.5%	4.2%	5.6%	6.6%	6.8%
Queensland	3.7%	2.4%	3.1%	1.1%	3.5%	Queensland	3.0%	31.3%	2.9%	1.3%	10.5%
SA	13.6%	13.6%	16.1%	14.3%	15.3%	SA	12.9%	8.4%	15.9%	15.1%	15.4%
WA	1.0%	1.0%	0.5%	1.0%	0.4%	WA	1.0%	1.1%	0.7%	1.8%	0.3%
Tasmania	0.6%	1.6%	0.5%	0.6%	0.7%	Tasmania	0.7%	1.5%	0.3%	0.4%	0.4%
NT	0.4%	0.5%	0.2%	0.3%	0.2%	NT	0.4%	0.4%	0.1%	2.4%	0.1%
ACT	1.5%	0.2%	0.3%	0.8%	0.5%	ACT	3.3%	0.0%	0.6%	0.6%	4.6%
Total interstate	26.5%	24.6%	24.4%	22.8%	27.7%	Total interstate	30.9%	47.0%	26.2%	28.2%	38.1%

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

• In YE Jun 10, the Grampians received nearly ¾ (72.3%) of **visitors** from Victoria – the number visitors was down by 15.1% on YE Jun 09. Victoria’s contribution to visitors was down by 4.9% points over the same period. Compared to YE Jun 09, visitors from regional Victoria declined by 6.0% and visitors from Melbourne decreased by 24.7%.

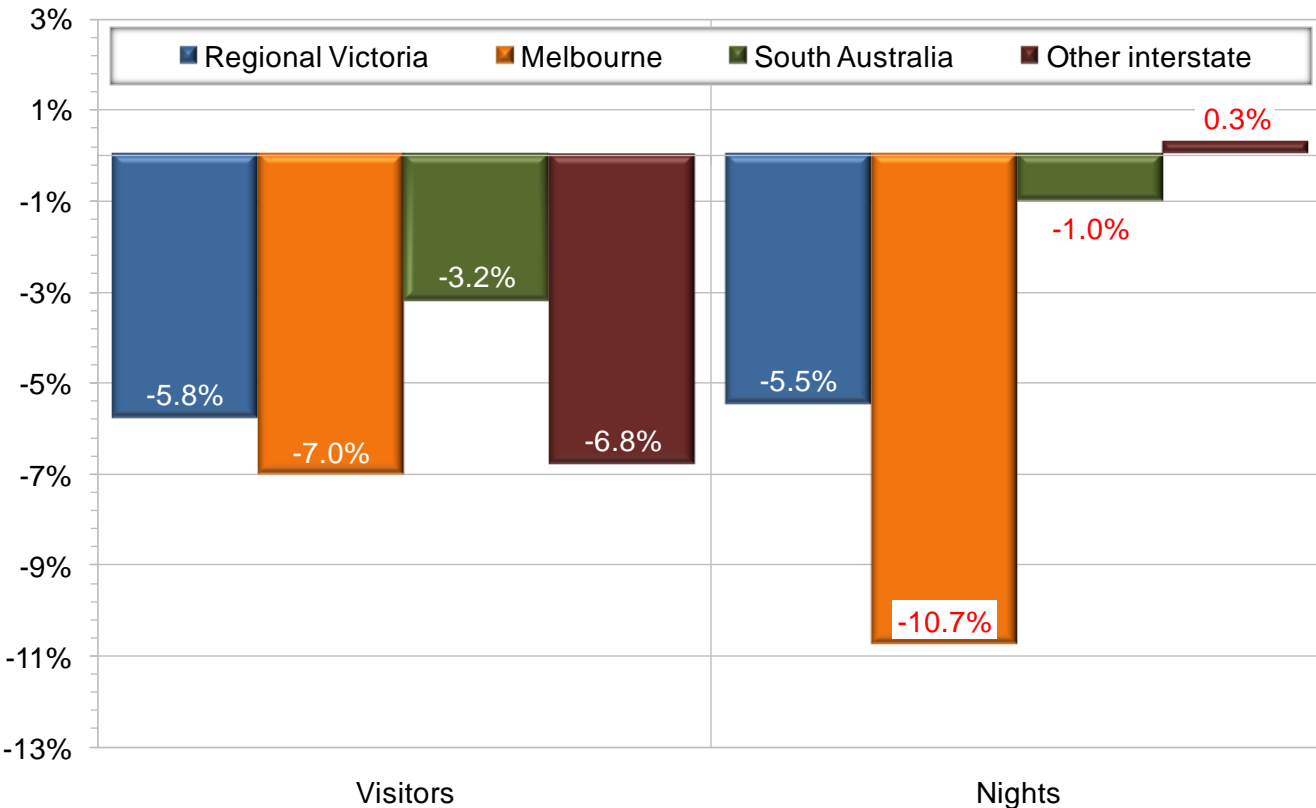
• Over ¼ (27.7%) of visitors came from interstate – up by 10.5% and by 4.9% points on YE Jun 09. South Australia (15.3%) was the largest market of interstate visitors – down by 3.3% on YE Jun 09.

• The Grampians received over 3/5 (61.9%) of visitor **nights** from Victoria - down by 9.2% on YE Jun 09. Victoria’s contribution to visitor nights was down by 9.9% points over the same period. Compared to YE Jun 09, visitor nights by regional Victorians increased by 6.1%.

• Nearly 2/5 (38.1%) of nights were from interstate. **South Australia (15.4%) 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 Jun 06 to YE Jun 10**

- Over the period, the Grampians had an average annual decline in domestic **visitors** from regional Victoria, Melbourne, South Australia and other interstate.
- Visitors from South Australia had the lowest decline (3.2%), while Melbourne had the highest decline (7.0%).
- The Grampians had an average annual decline in domestic visitor **nights** from regional Victoria, Melbourne and South Australia over the period. Nights from other interstate experienced growth of 0.3%.
- Nights by South Australians (1.0%) had the lowest decline.
- Nights by Melbourne visitors (10.7%) 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

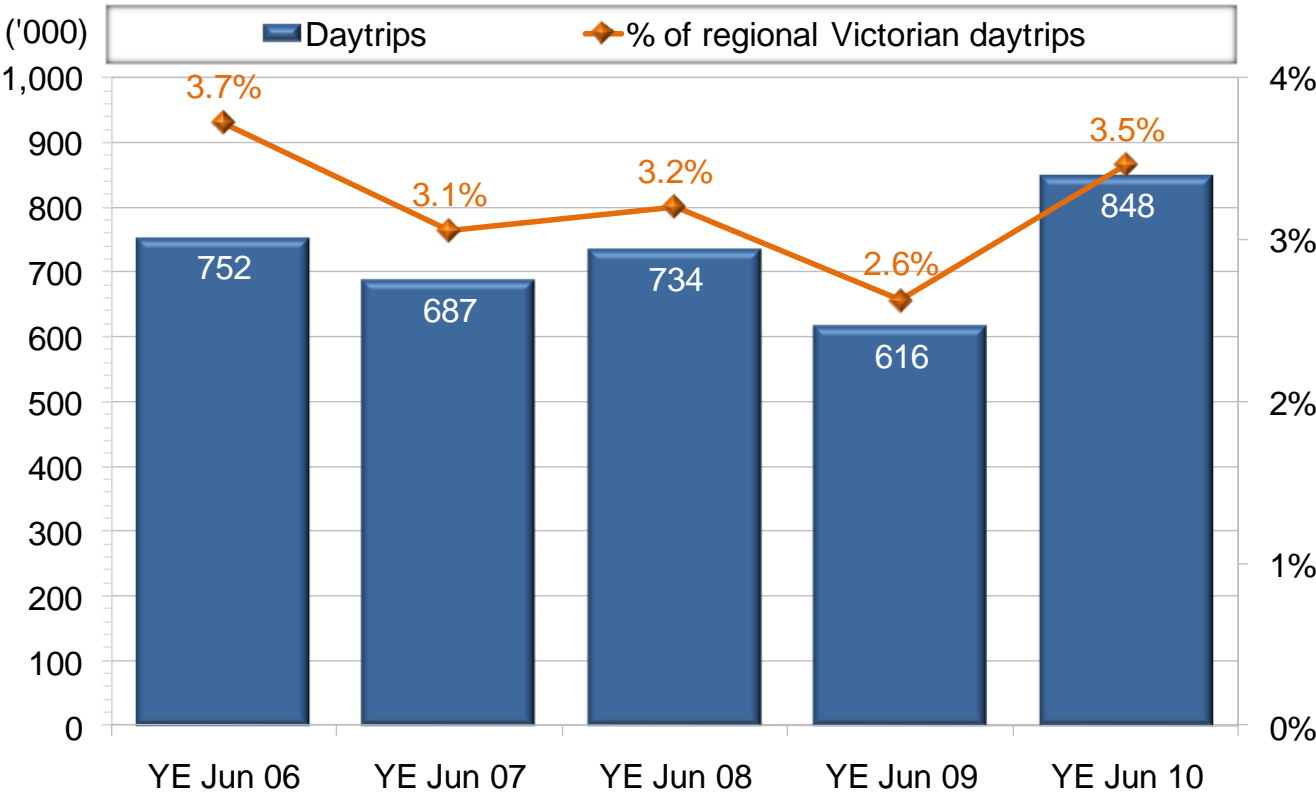
Daytrips **to** the Grampians by Australian residents aged 15 and over.

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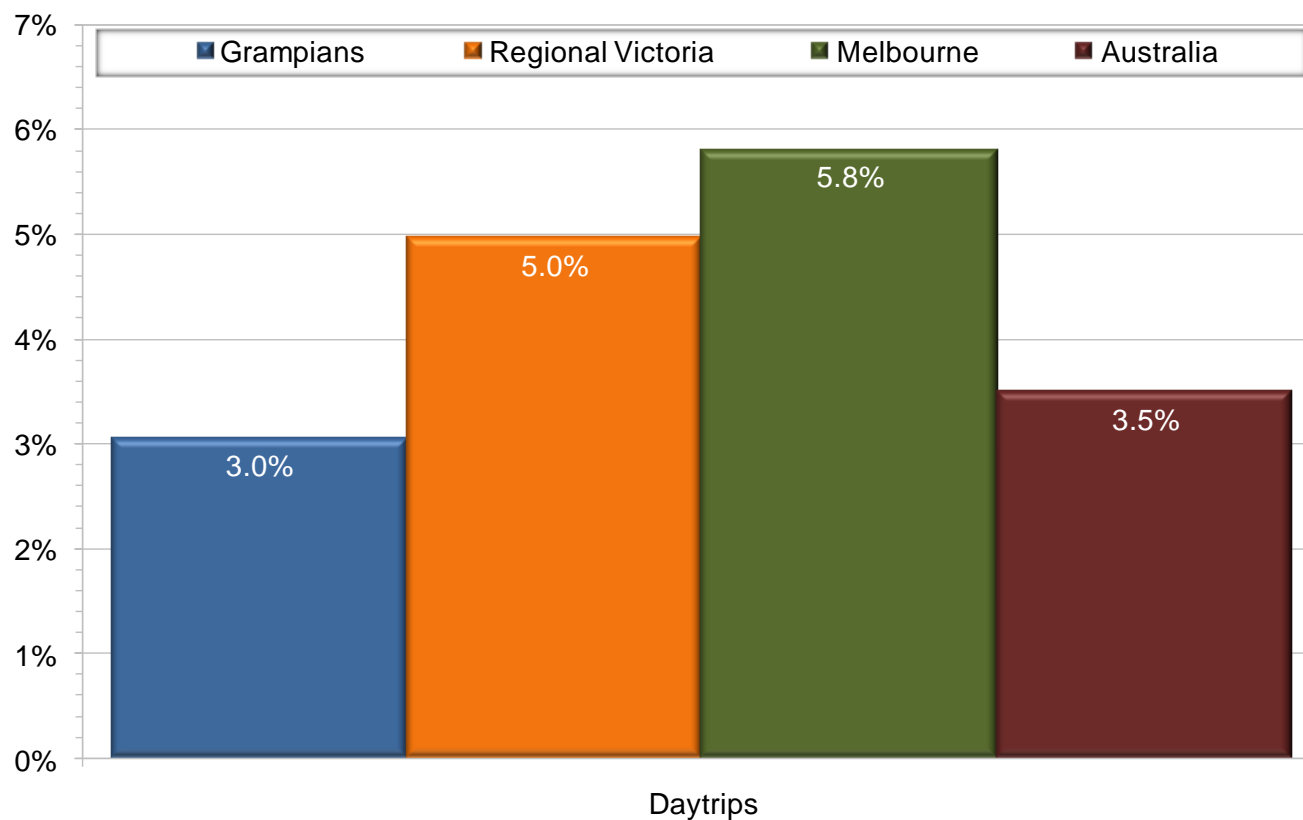
# Daytrips and market share



**In YE Jun 10**

- The Grampians received 848,000 daytrip visitors - up by 37.7% on YE Jun 09 and by 12.8% on YE Jun 06.
- Nearly 1/25 (3.5%) of daytrips to regional Victoria were to the Grampians - up by 0.9% pts on YE Jun 09, but down by 0.2% pts on YE Jun 06.

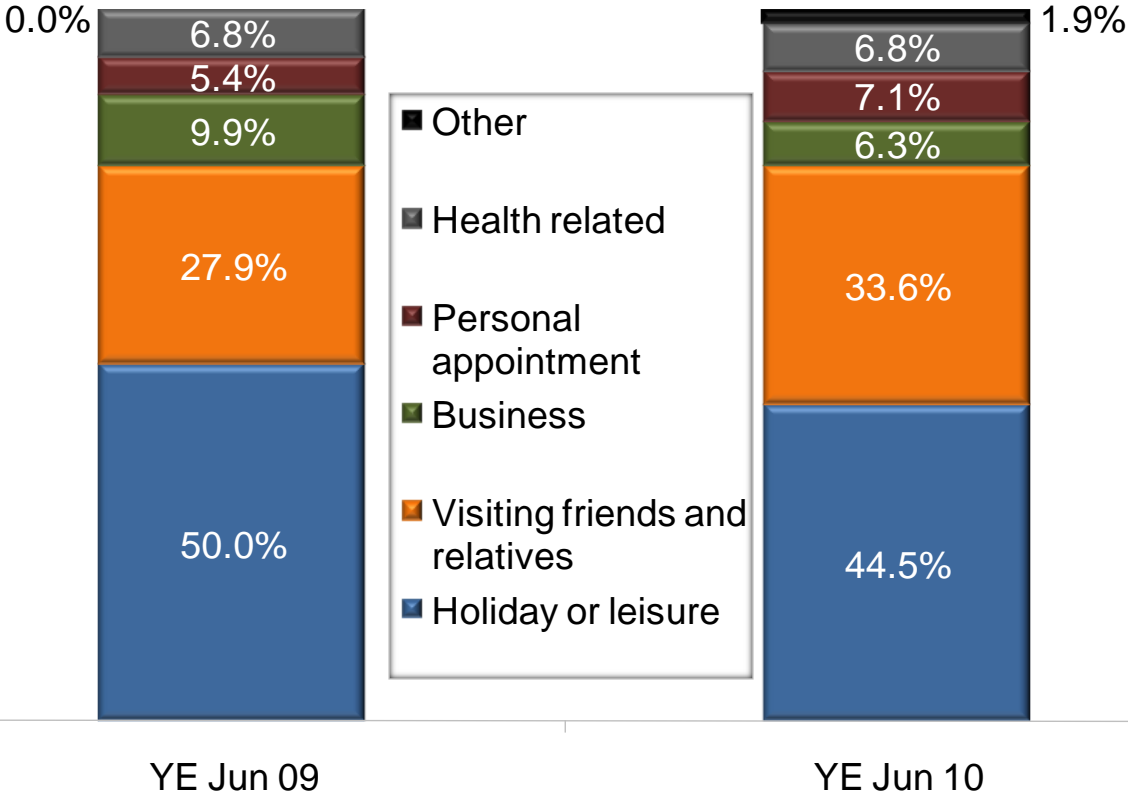
# Average annual growth for selected destinations



## YE Jun 06 to YE Jun 10

- Over the period, the Grampians had an average annual growth of 3.0% in domestic daytrips.
- The Grampians had a lower growth than regional Victoria, Melbourne and Australia.

# Main purpose of trip



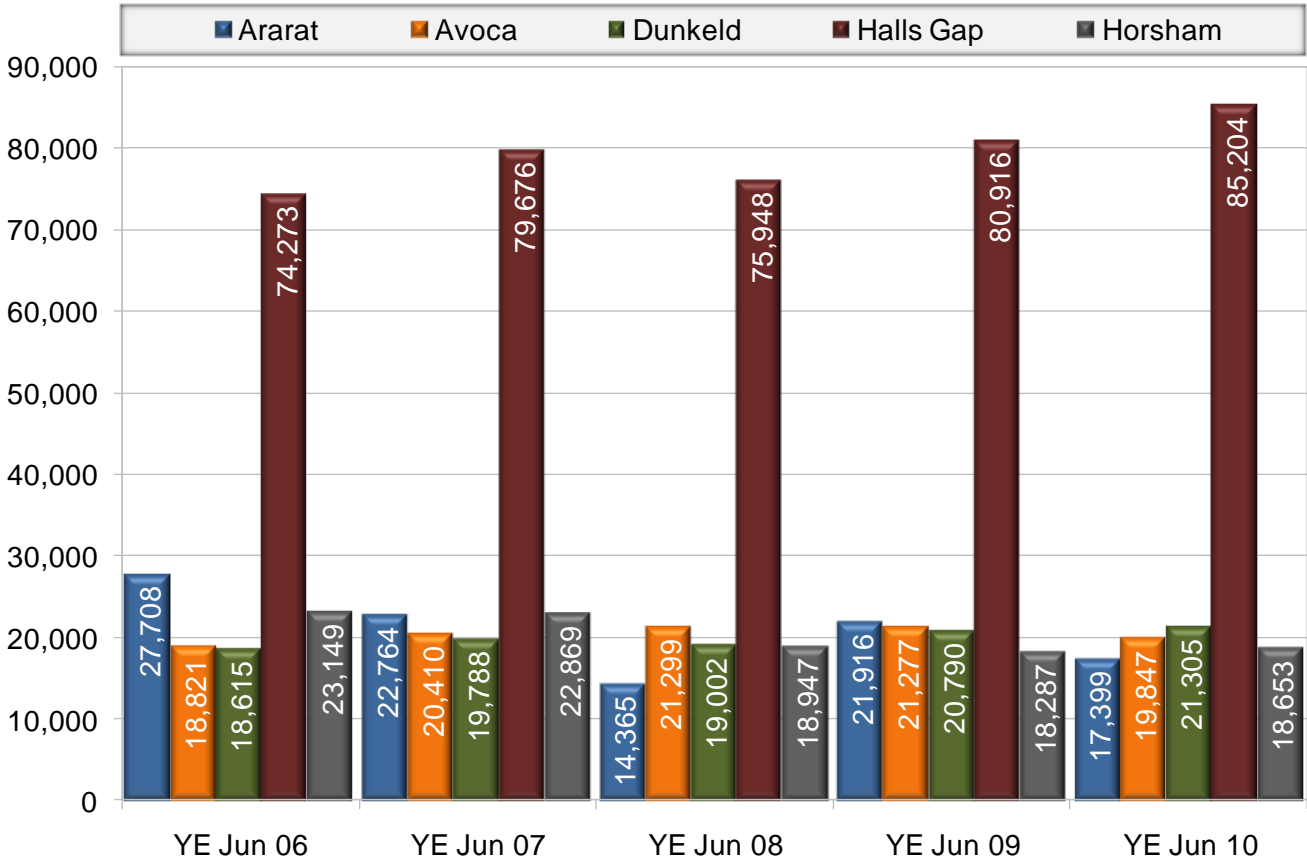
**YE Jun 10**

- ‘Holiday or leisure’ (44.5%) was the most popular purpose for domestic daytrips to the Grampians – down by 5.5% points on YE Jun 09.
- ‘Visiting friends and relatives’ (33.6%) was the 2<sup>nd</sup> most popular – up by 5.7% points on YE Jun 09.
- ‘Personal appointment’ (7.1%) was the 3<sup>rd</sup> most popular – up by 1.7% points on YE Jun 09.

# Visitor Information Centres

Visitors to selected Visitor Information Centres **in** the Grampians

# Visitation to selected VICs



**In YE Jun 10**

- Ararat VIC received 17,399 visitors – down by 20.6% on YE Jun 09 and by 37.2% on YE Jun 06.
- There were 19,847 visitors to the Avoca VIC - down by 6.7% on YE Jun 09, but up by 5.5% on YE Jun 06.
- Dunkeld VIC received 21,305 visitors - up by 2.5% on YE Jun 09 and by 14.5% on YE Jun 06.
- There were 85,204 visitors to Halls Gap VIC - up by 5.3% on YE Jun 09 and by 14.7% on YE Jun 06.
- Horsham VIC received 18,653 visitors - up by 2.0% on YE Jun 09, but down by 19.4% on YE Jun 06.

**YE Jun 06 to YE Jun 10**

- In the period YE Jun 06 to YE Jun 10, the Avoca VIC (1.3%), Dunkeld VIC (3.4%) and Halls Gap VIC (3.5%) had an average annual growth.
- Over the same period, Ararat VIC (-11.0%) and Horsham VIC (-5.3%) 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	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Change on previous month	Change on corresponding previous year
Visits ('000)	18.4	19.0	18.0	16.0	17.6	18.0	16.5	26.6	22.3	15.9	15.4	16.0	18.6	16.6%	1.0%
Page views ('000)	200.3	209.4	198.3	168.8	200.3	196.0	177.0	261.9	211.5	164.6	177.3	173.2	188.2	8.6%	-6.0%
Average page views	10.9	11.0	11.0	10.6	11.4	10.9	10.7	9.8	9.5	10.4	11.5	10.9	10.1	-6.8%	-7.0%
Time on site	9.35	9.33	9.42	9.20	10.08	9.22	9.13	8.49	8.38	9.09	10.03	9.35	9.01	-5.9%	-5.9%
New visits	59.1%	65.8%	65.1%	66.2%	62.9%	64.5%	62.4%	63.4%	60.9%	64.6%	61.8%	64.2%	64.2%	0.0	5.1

• **In Aug 10**, there were 18,590 visits to “Grampians” on [www.visitvictoria.com](http://www.visitvictoria.com) - up by 16.6% on Jul 10. Over the previous 13 months, “Grampians” received the highest number of visits in Mar 10 (26,612).

• “Grampians” visitors viewed 188,170 pages in Aug 10 - up by 8.6% on Jul 10. In the period Aug 09 to Aug 10, visitors viewed the highest number of pages in Mar 10 (261,868).

• In Aug 10, “Grampians” visitors viewed on average 10.1 pages - down by 6.8% on Jul 10. Over the previous 13 months, Jun 10 (11.5 pages) had the highest average number of pages viewed.

• “Grampians” visitors spent 9 minutes and 1 seconds on the site in Aug 10 - down by 5.9% on Jul 10. In the period Aug 09 to Aug 10, visitors spent the longest amount of time on site in Dec 09 (10 minutes and 8 seconds).

• In Aug 10, “Grampians” received 64.2% new visitors – unchanged on Jul 10. Over the previous 13 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*).
- 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, Pyrenees (S) – North and Pyrenees (S) – South.
- 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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