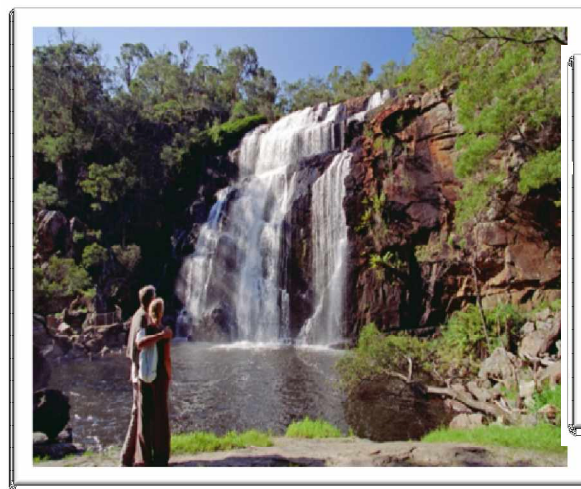




Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia

The Grampians Visitor Profile and Satisfaction Project



In partnership with



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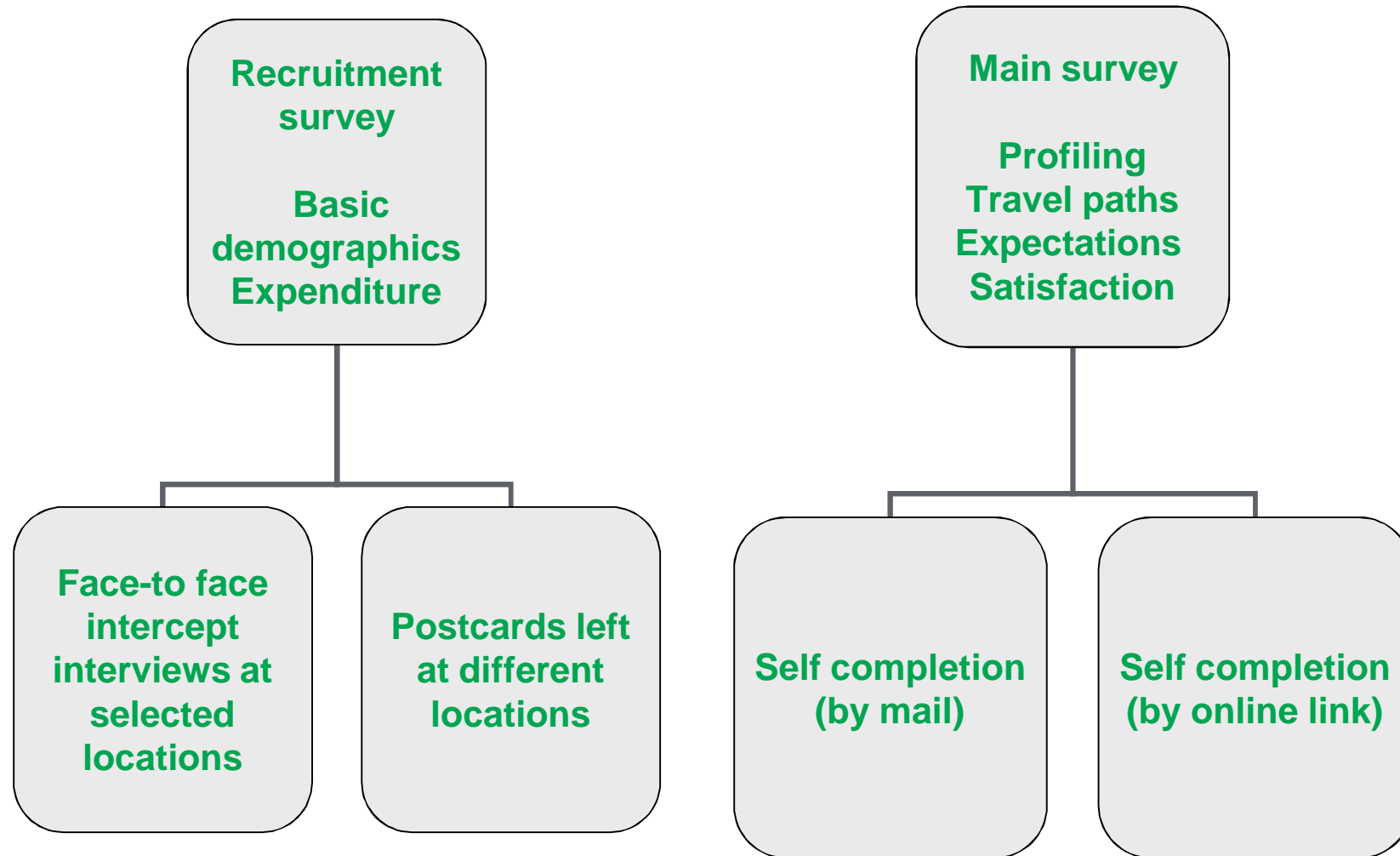
Background

The Grampians VPS Project

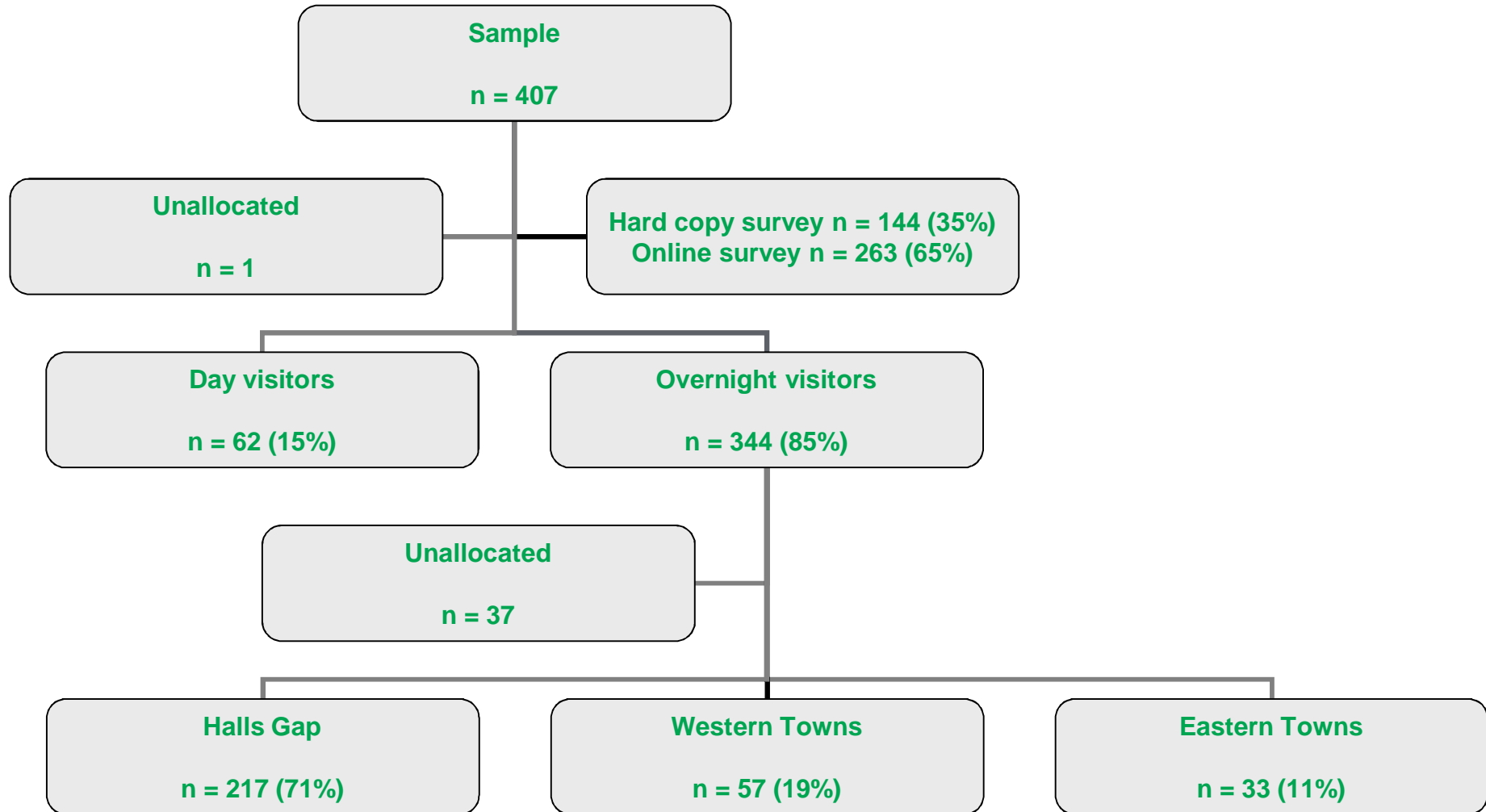
The Grampians Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (part of the Department of Resources Energy and Tourism).

The survey was conducted in October 2009. 407 surveys were completed.

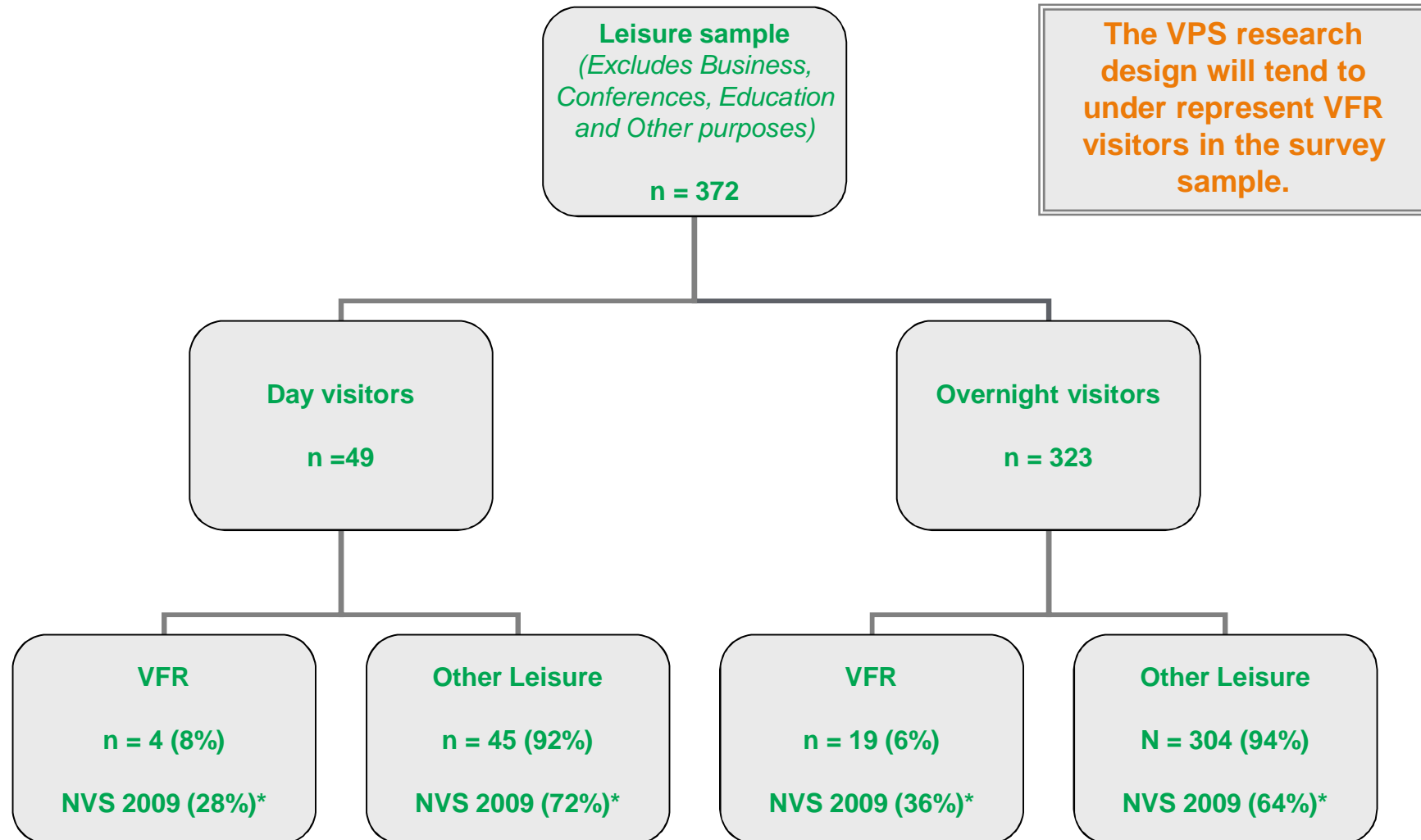
Data collection



Survey Sample



Survey sample under samples VFR compared with NVS



* Includes Western Grampians and Central Highlands tourism regions

VPS Benchmarks

- Since 2006 about 70 VPS projects have been completed in Australian regional tourist destinations. Data from these projects have been collated to establish the VPS Benchmark Database.
- Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents. Only the most recent waves for each destination are included.
- Comparisons against VPS benchmarks are made throughout this report. The Grampians Benchmark Summary is available in conjunction with this report. This summary provides a full set of comparisons for Grampians results against the benchmarks.
- More detail on the Benchmark Summary is provided in the Appendix

Discussion of findings

Discussion of findings

The following discussion focuses on the key findings of the Grampians Visitor Profile and Satisfaction Study. The majority relate to the Grampians as a whole but wherever possible the discussion also considers results at a sub-regional level within the Grampians. The three sub-regions that have been derived are visitors who stayed overnight in:

1. Halls Gap
2. Western Towns (Horsham, Hamilton)
3. Eastern towns (Stawell, Avoca, Ararat, Dunkeld)

While analysis of the regions outside Halls Gap is more limited due to small sample sizes some interesting patterns are evident.

The discussion should be viewed as a starting point for further consideration of the results taking into account local knowledge and experience. The body of the report presents the full set of results and includes comparisons with benchmarks for all VPS program destinations.

Discussion of findings

Visitor and trip characteristics

The majority of visitors to the region were there for holiday/leisure purposes particularly at Halls Gap where this was true for 9 in 10 visitors. The Western and Eastern towns were not quite as holiday/leisure focussed and attracted visitors for a broader range of trip purposes. In these two sub-regions about a quarter of visitors were there on business, visiting friends and relatives or attending events (such as the races at Avoca, the Victorian Symphony Orchestra in Hamilton or conferences). This broader profile is evident in many of the characteristics of tourism in the Western and Eastern towns when compared to Halls Gap.

Visitors from all life stages were well represented in the Grampians. Halls Gap is distinctive in that family travel parties are about as common as couples. In the Western and Eastern towns couples are most common. Outside Halls Gap the industry also caters to a higher proportion of single travellers, reflecting the presence of more business, VFR and event visitors.

Discussion of findings

Across the whole region most visitors were from regional Victoria, SA, Melbourne and NSW. Halls Gap drew the highest proportion of visitors from SA. The Eastern Towns drew a greater proportion from Melbourne and the Western Towns drew a greater proportion from regional Victoria.

Planning periods for the Grampians were slightly longer than average planning periods amongst other VPS benchmark destinations. A higher proportion of visitors began planning 3 months or more before the trip. This was driven mainly by interstate visitors and those travelling with friends or relatives.

Internet usage for gathering information on the Grampians was relatively high compared to the VPS benchmarks. However, older non-working couples were less likely to use the internet and more likely to use non-internet sources only.

Of all the visitors who spent one or more nights in Halls Gap seven in ten made a daytrip to another town in the region. The most commonly visited towns were Stawell, Ararat, Dunkeld and Horsham.

Discussion of findings

Why visitors came to the Grampians?

Visitors gave feedback on why they chose to visit the Grampians for their trip in a few ways (main reason, all reasons, experiences expected). To experience nature played the most significant role in the reasons visitors chose to visit. In this case experiencing nature represents the flora, fauna and physical features of the region. The opportunity to tour around and explore and to have an adventure were experiences that were also frequently desired of the Grampians.

Visitors to Halls Gap were the most strongly influenced by the scenic beauty, the nature experience and the fact that this adds up to being a great place for the family/couple to visit with a variety of things to do and plenty that the kids will enjoy.

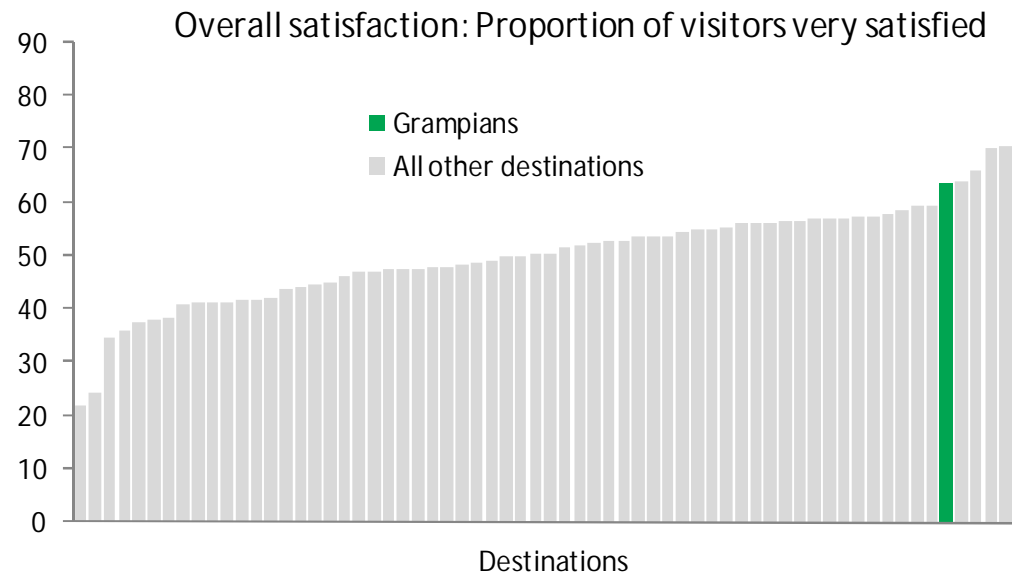
Events, the variety of things to do, suitability for families and attractions were important for Eastern towns – beauty and nature seem to play a lesser role here. The expectation of a food and wine experience was also most commonly held by visitors to the Eastern towns.

Events, convenient stopover, nature, beauty and attractions all play a role for the Western Towns and this region seems to be more aligned with Halls Gap in terms reasons for visiting.

Discussion of findings

Were visitors happy with their trip to the Grampians?

In terms of overall satisfaction with the trip to the Grampians visitors were very happy. In fact the Grampians was the sixth highest rated destination of the 65 destinations included in the VPS benchmark database. Of all visitors, 64% reported that they were very satisfied with their visit to the Grampians compared with the VPS benchmark of 51%. The Grampians (70%) also scored highly in terms of visitors very likely to recommend compared with the VPS benchmark (51%).



Discussion of findings

So what drives such high overall satisfaction levels with the Grampians? The Grampians had several attributes that recorded above benchmark satisfaction ratings: value for money, commercial accommodation, information services in the region, roads and signage. Apart from strengths in these mainly functional attributes, the Grampians delivered very strongly on satisfaction with attractions and the expectations visitors held for nature based experiences, with both scoring well above VPS benchmarks.

Visitors to Halls Gap generally have higher satisfaction levels, particularly in terms of experiences. However, outside Halls Gap satisfaction levels are still high, particularly with the more functional aspects of a visit. Halls Gap's strength in delivering nature based experiences to a range of visitor types acts as the major drawcard to the region. This presents opportunity to areas outside Halls Gap, particularly as the majority of visitors staying in Halls Gap visit other towns in the region. Perhaps this opportunity is highlighted by the food and wine visitor segment evident in the Eastern towns. As a group they do not have a significantly different profile to the Halls Gap visitor population. Other areas in the region could be able to leverage off the attraction of Halls Gap, particularly if complementary experiences are offered.

Discussion of findings

The Halls Gap Zoo appears a good example of a complementary experience to the nature based offerings at Halls Gap. It was nominated frequently by visitors as an exceptional experience they had in the region.

Aside from all the positive aspects of tourism in the Grampians there were a couple of issues that stood out as possible areas for attention particularly for Halls Gap. Shopping received very low satisfaction scores in the region compared with the VPS benchmark. Gauging from the open ended responses provided by visitors, this result seems to reflect dissatisfaction with grocery shopping in Halls Gap, the main issue being the cost of items.

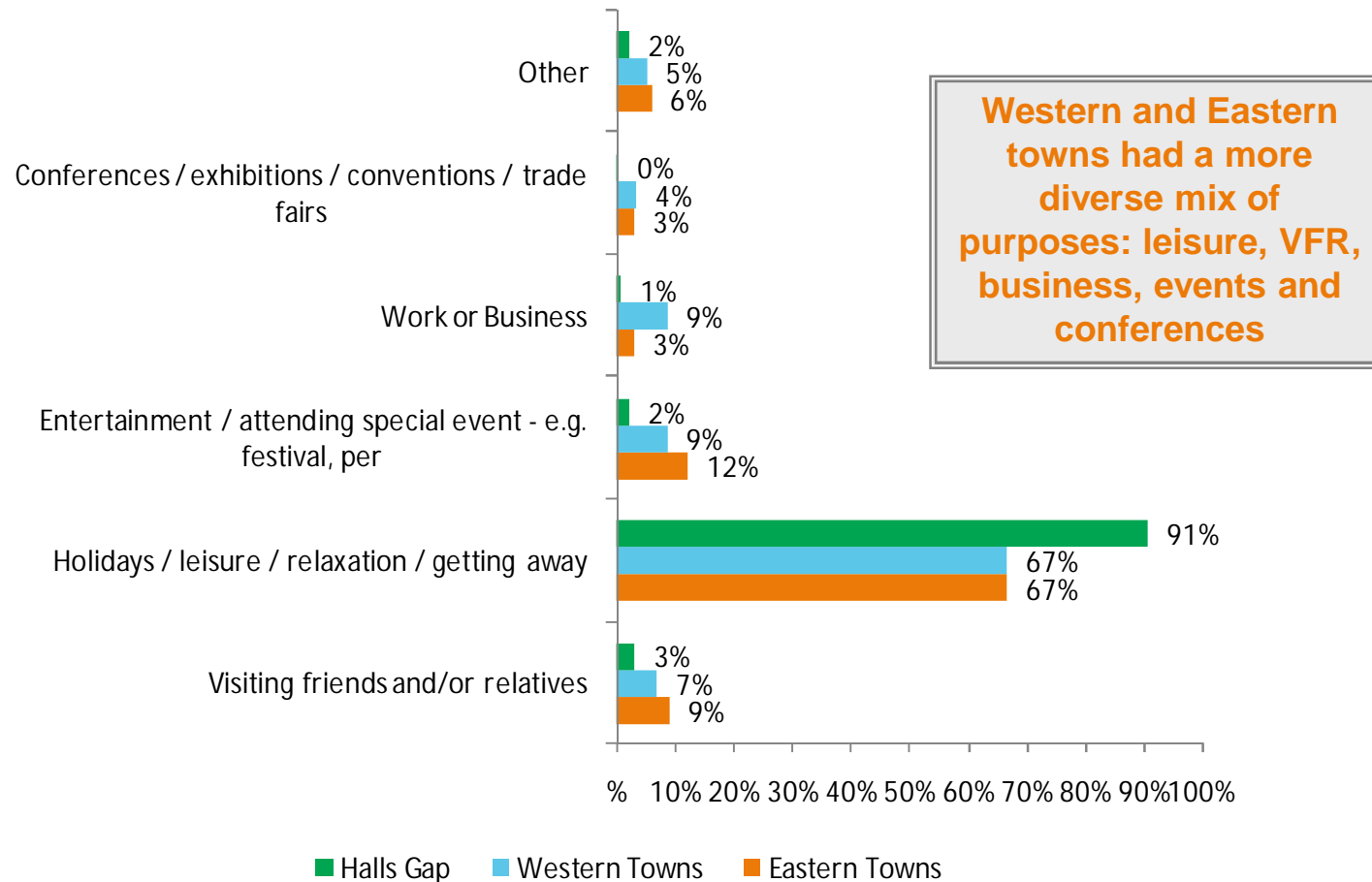
Food and beverage also received relatively low satisfaction scores in the region and again this seems to be a particular concern of Halls Gap. The open ended responses of respondents point towards a lack of choice and in particular a lack of quality dining options in Halls Gap.

Visitor and trip characteristics

Visitor profile (during the survey period)

- ∅ Trip purpose
- ∅ Age and life stage
- ∅ Travel party
- ∅ Origin

Holidays/leisure was the main trip purpose



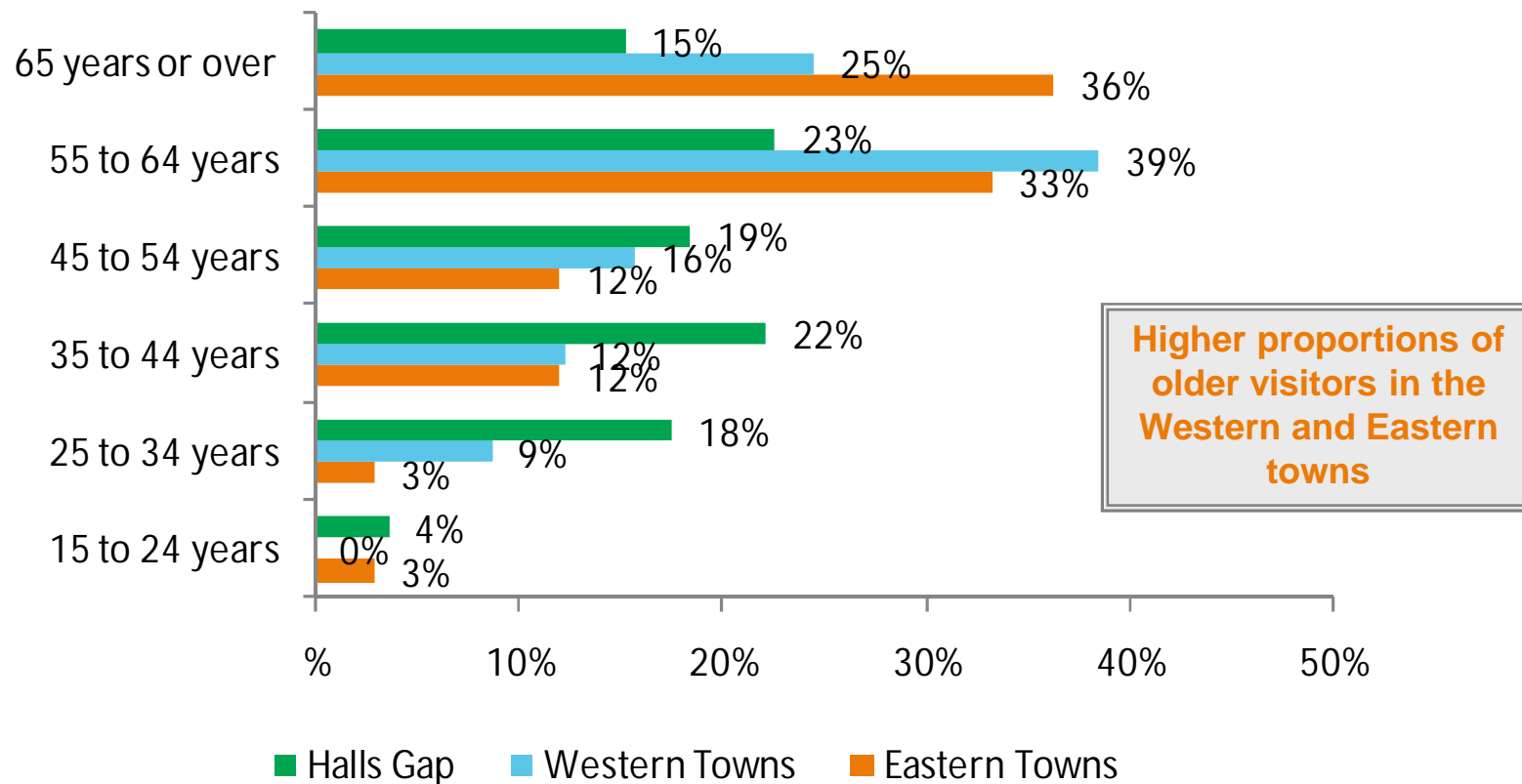
Western and Eastern towns had a more diverse mix of purposes: leisure, VFR, business, events and conferences

Although the majority of day visitors were there for holiday/leisure (64%), 12% were also there for entertainment or to attend a specific event.

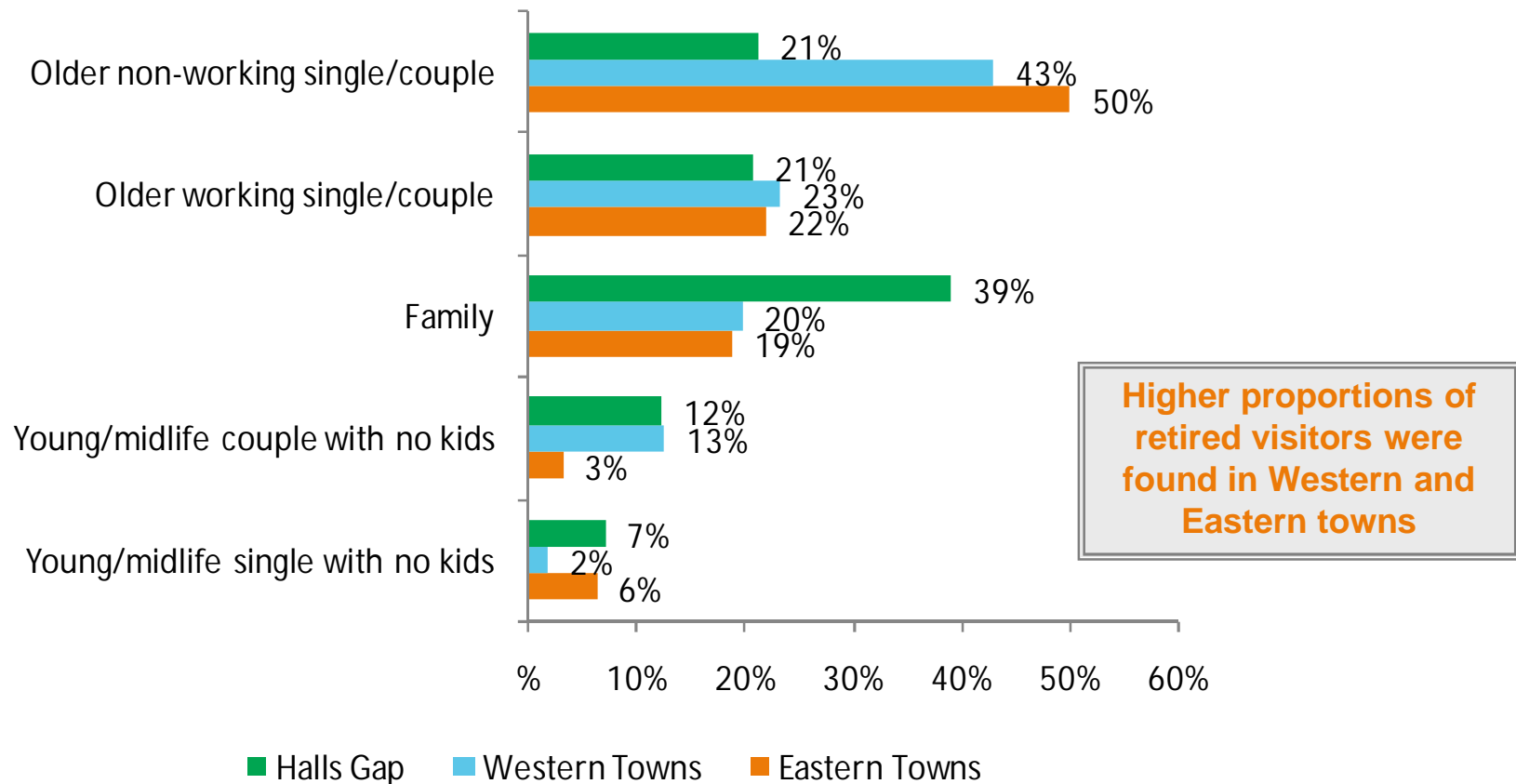
Bases: Halls Gap - 216;
 Western Towns - 57;
 Eastern Towns - 33;
 Day - 59

'What was the main purpose of the trip?'

The Grampians attracted a range of age groups

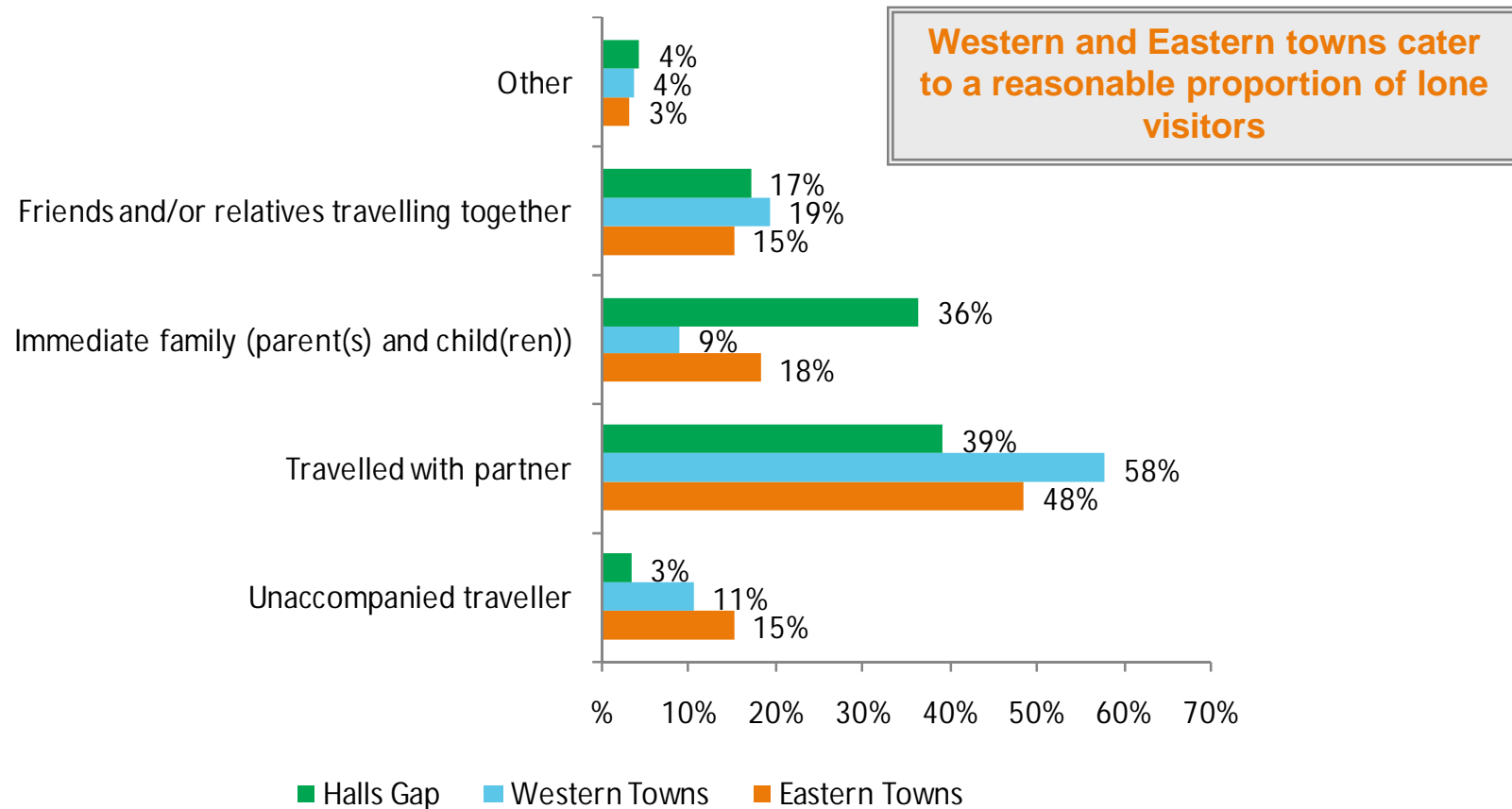


The Grampians attracted visitors from all life stages



Day visitors had a similar profile to Halls Gap.

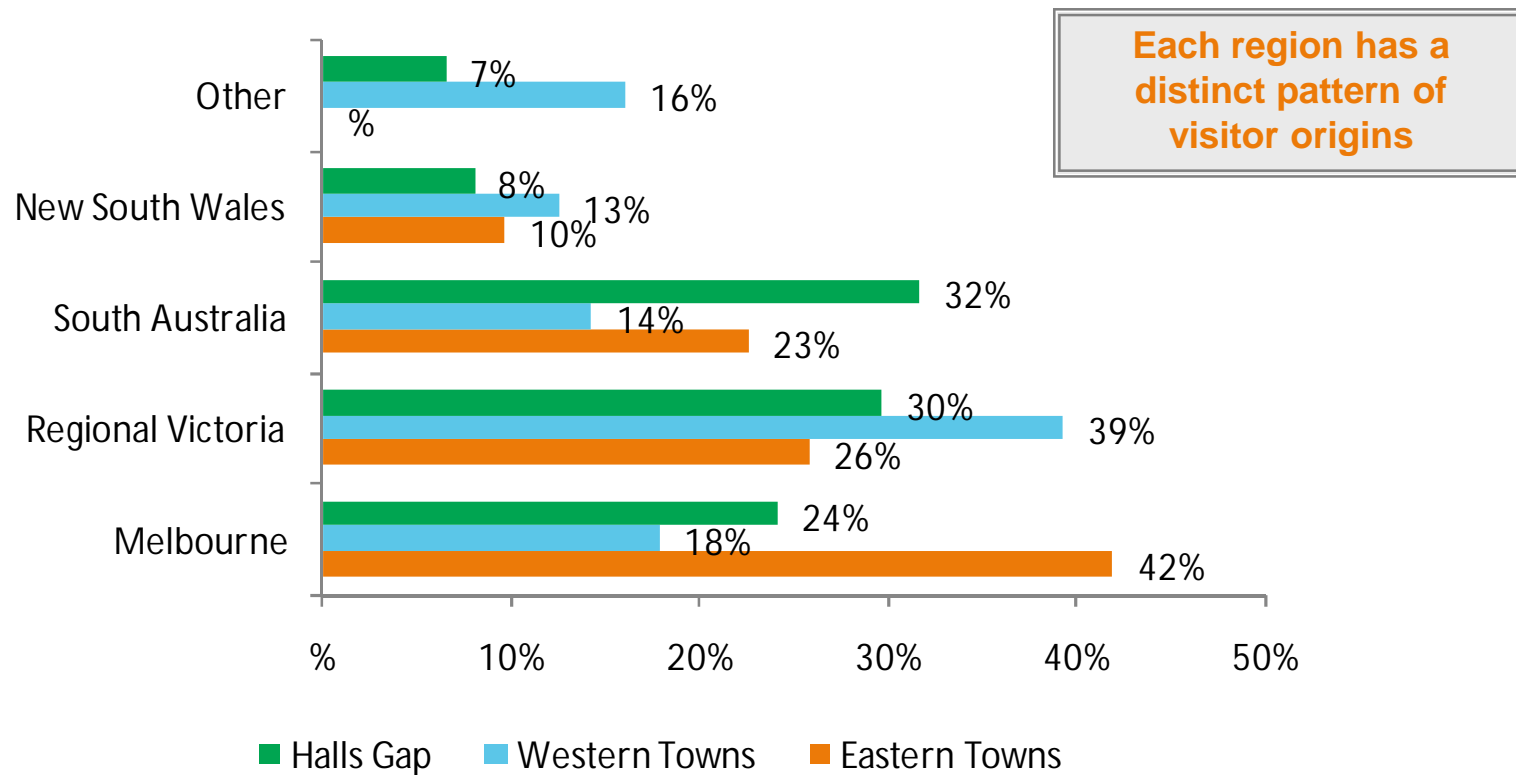
There were less family groups visiting areas outside Halls Gap



“How would you describe your travel party, that is, all persons with whom you directly traveled and shared most expenses? Traveled with ...”

Bases: Halls Gap - 217; Western Towns - 57; Eastern Towns - 33

Regional VIC, SA, Melbourne and NSW are all important markets



"In which State or Territory do you reside?"

"What is your home postcode?"

Summary – visitor profile

- Ø Holiday/leisure/relaxation/getting away is the most common trip purpose amongst the survey respondents – true for 91% of overnight visitors to Halls Gap and 67% for both the Western and Eastern Towns
- Ø The Western and Eastern Towns had a more diverse mix of trip purposes with small percentages of visitors there for work or business, visiting friends and relatives and attending special events.
- Ø Halls Gap attracted primarily couples (39%), immediate family travel parties (36%) and groups of friends/relatives (19%)
- Ø The Western and Eastern Towns attracted more couples than any other type of travel party (58% and 48% respectively)
- Ø Halls Gap attracted visitors primarily from SA (32%), Regional Victoria (30%) and Melbourne (24%)
- Ø The Western Towns attracted visitors primarily from Regional Victoria (39%)
- Ø The Eastern Towns drew mostly from Melbourne (42%) and Regional Victoria (26%)

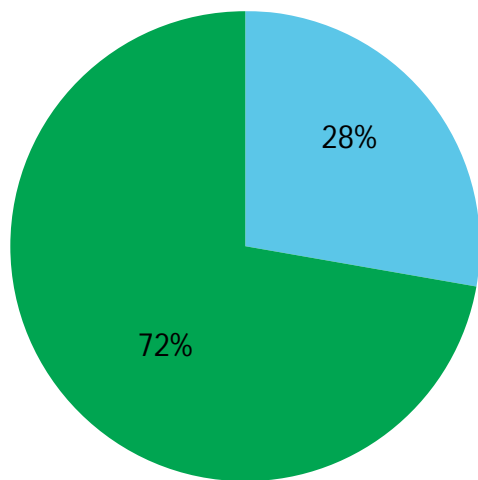
Trip planning and booking

- ∅ Past visitation
- ∅ Planning period
- ∅ Information sources
- ∅ Booking information

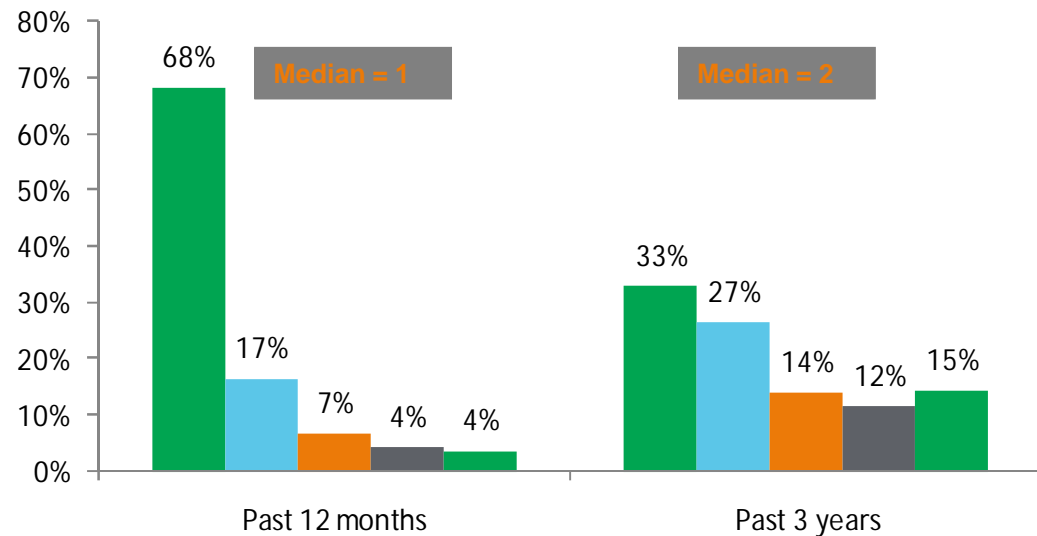
Most visitors were repeat visitors

VPS benchmarks:

First time visitors: 33%



■ First ■ Repeat



Past 12 months

Past 3 years

Median = 1

Median = 2

■ 1 (This visit) ■ 2 times ■ 3 times ■ 4 to 5 times ■ More than 5 times

“Was this the first time you had visited the Grampians region, including both day trips and overnight trips?”

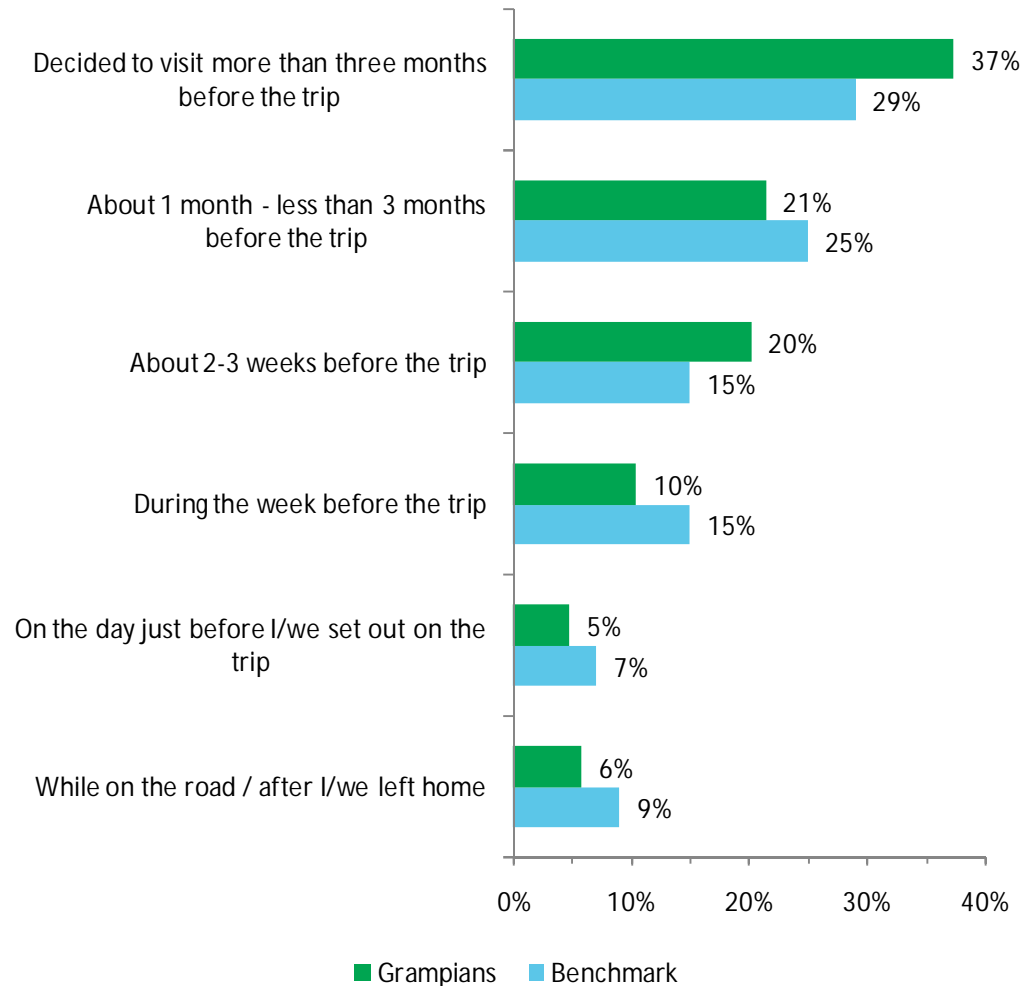
“How many times have you visited the Grampians region, including both daytrips and overnight trips ”

Of repeat visitors

Base = 407

Base = 294

Visitors to the Grampians had longer planning periods than VPS benchmarks

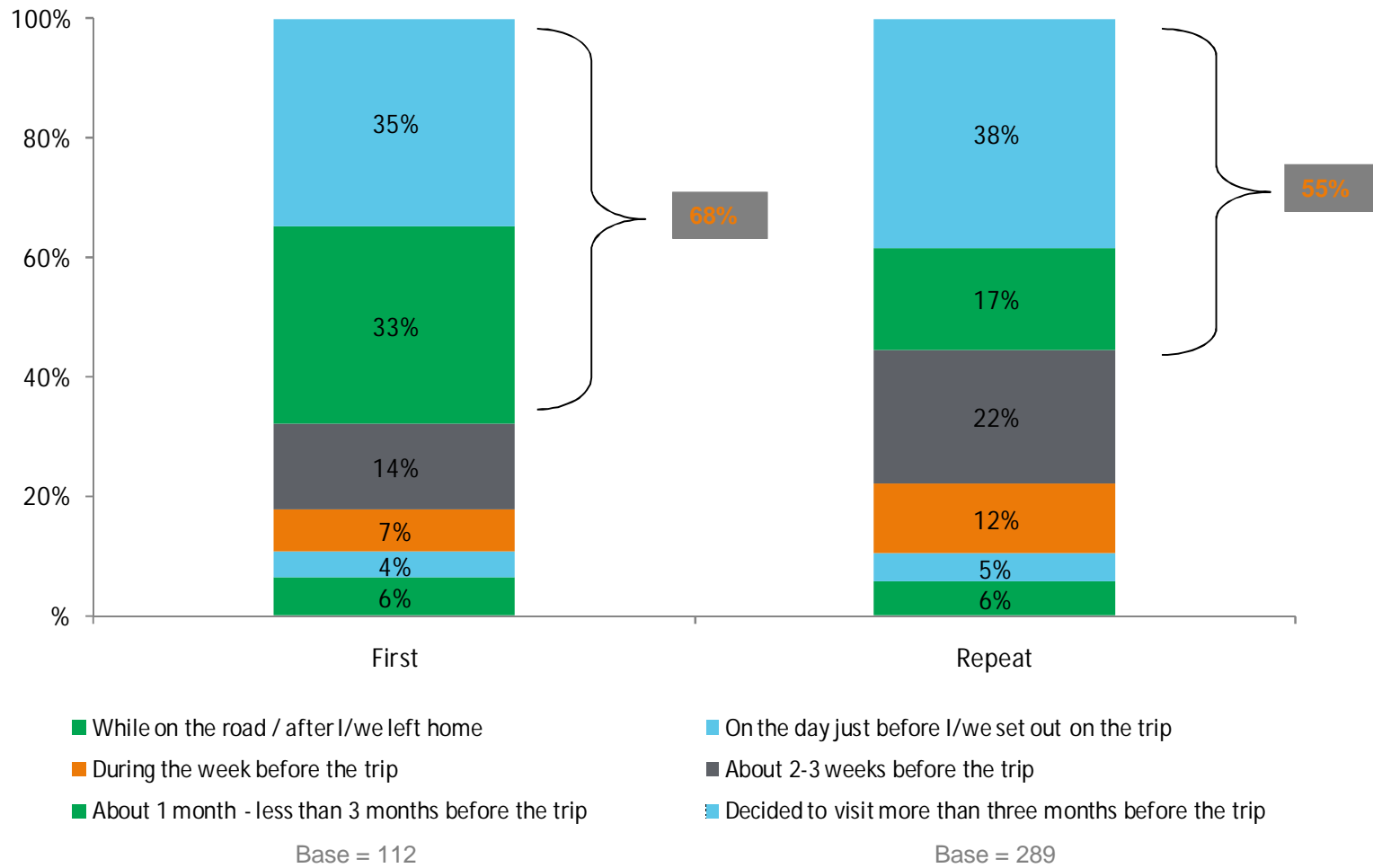


Longer planning periods driven by:

- interstate visitors (46% planned more than 3 months), and
- visitors travelling in a party with friends and/or relatives (53% planned more than 3 months)

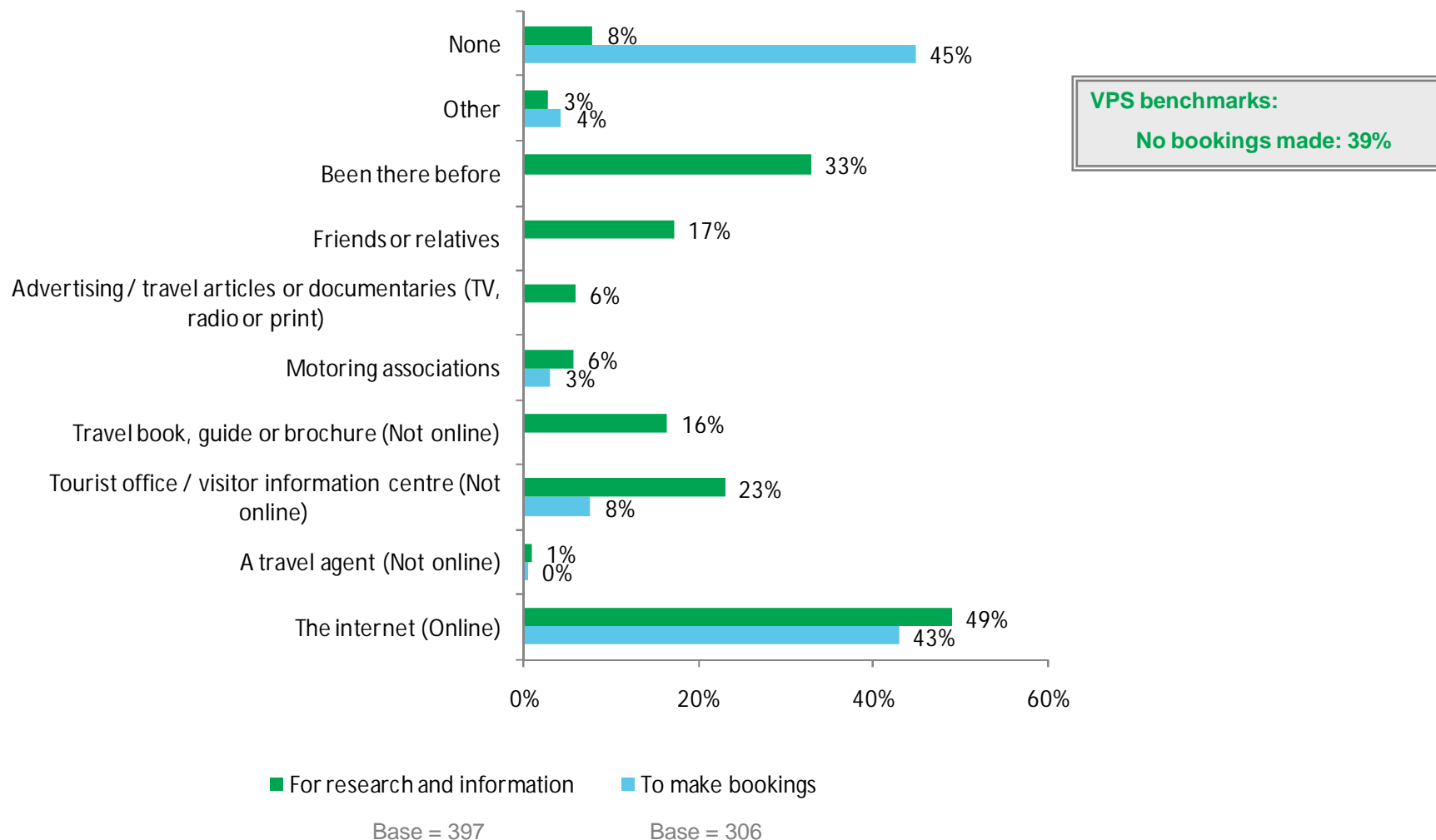
Only 31% of family groups planned more than 3 months in advanced

First time visitors had slightly longer planning periods



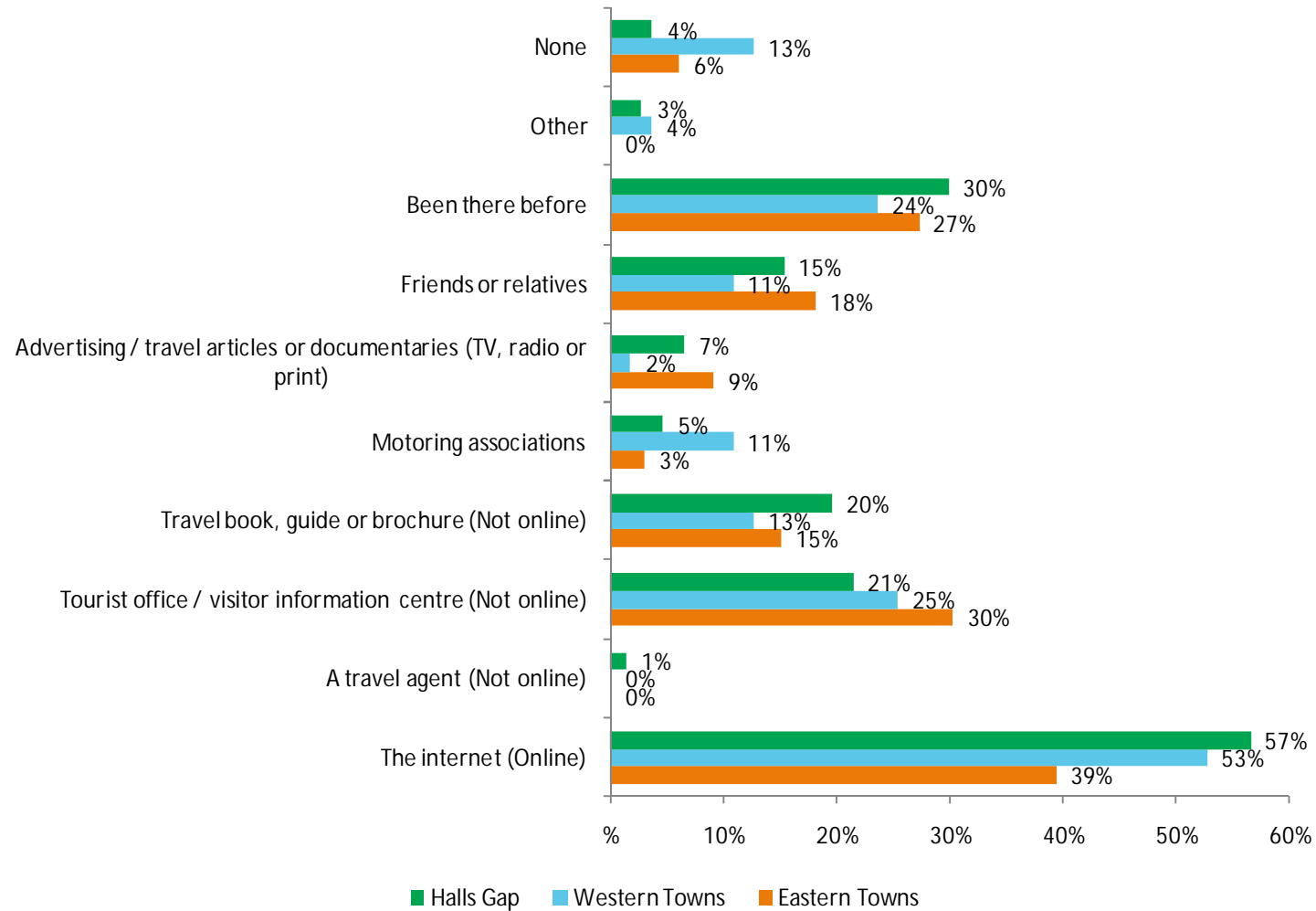
"Was this the first time you had visited the Grampians region, including both day trips and overnight trips?"
"When was the decision made to visit destination?" (excludes Business travellers)

The proportion of visitors not making any bookings was above the VPS benchmark



'Which of the following did you use to obtain information and/or make bookings for this trip to the Grampians region?'

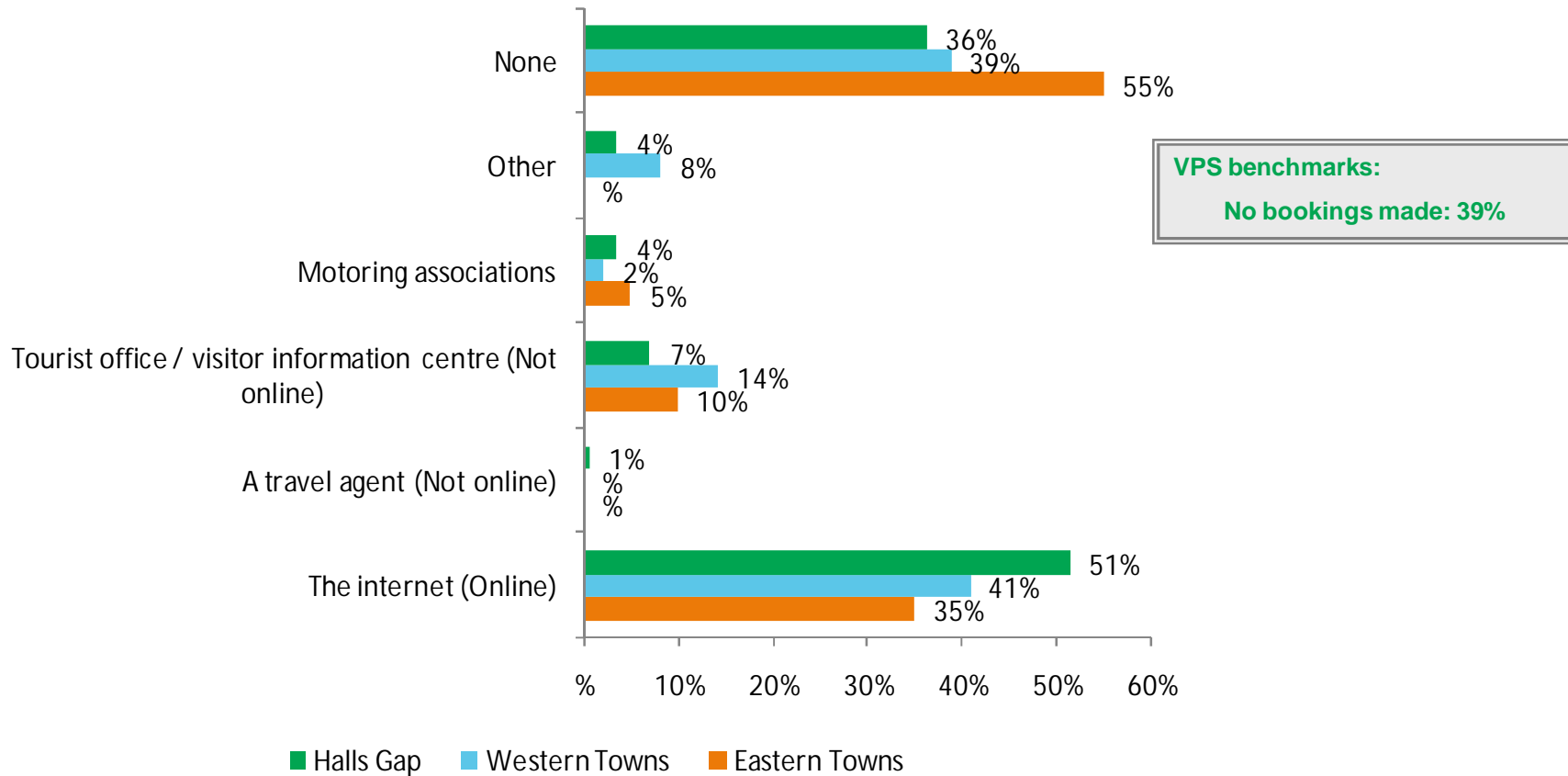
The internet was the most popular source for research and information in all regions



Bases: Halls Gap - 214; Western Towns - 55; Eastern Towns - 33

'Which of the following did you use to obtain information and/or make bookings for this trip to the Grampians region?'

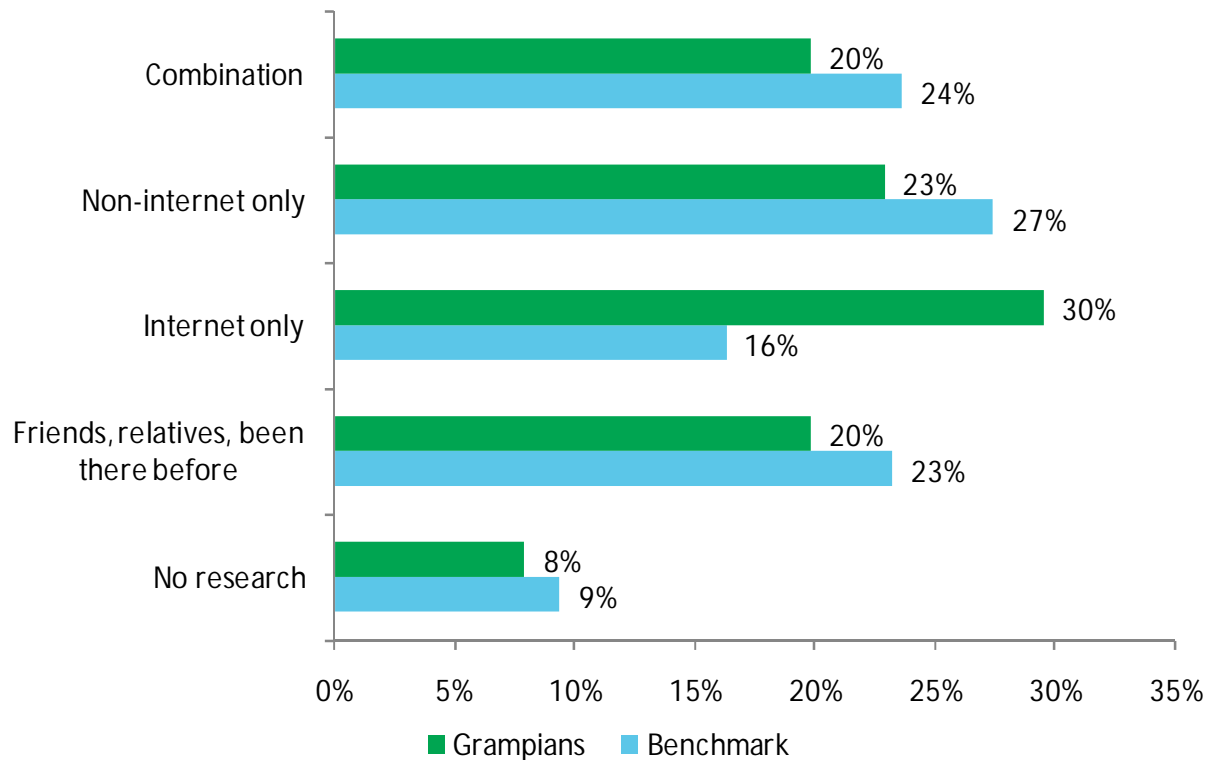
The proportion of visitors not making any bookings was driven by visitors to Eastern Towns



Bases: Halls Gap - 171; Western Towns - 49; Eastern Towns - 20

'Which of the following did you use to obtain information and/or make bookings for this trip to the Grampians region?'

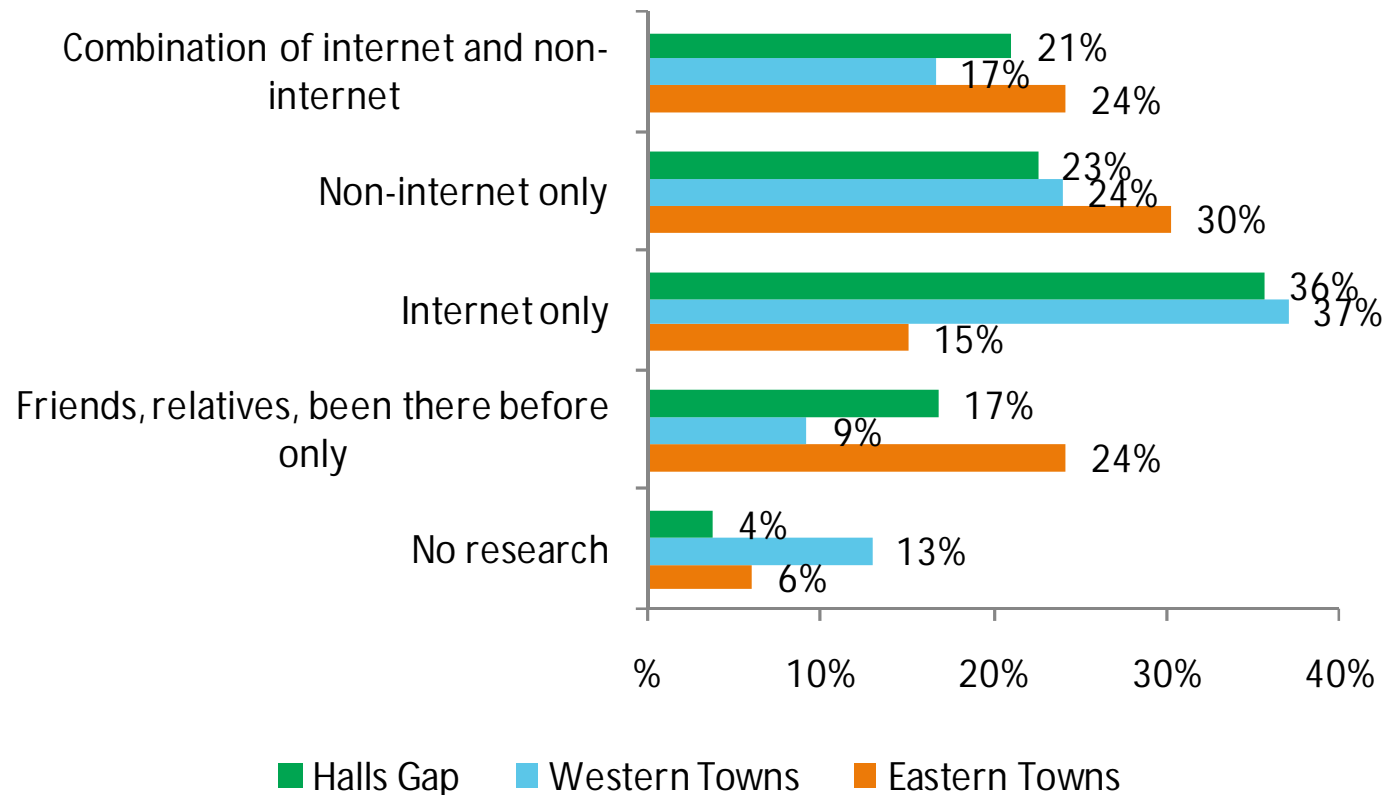
More visitors used the *internet only* for research and information compared to the VPS benchmark



Older non-working couples were less likely to use the internet only (15%) and more likely to use non-internet only (40%) compared with other life stages

Note: 'Friends, relatives, been there before' may be used in combination with other categories (excludes 'No research')

Differences in the pattern of information sources used across the regions

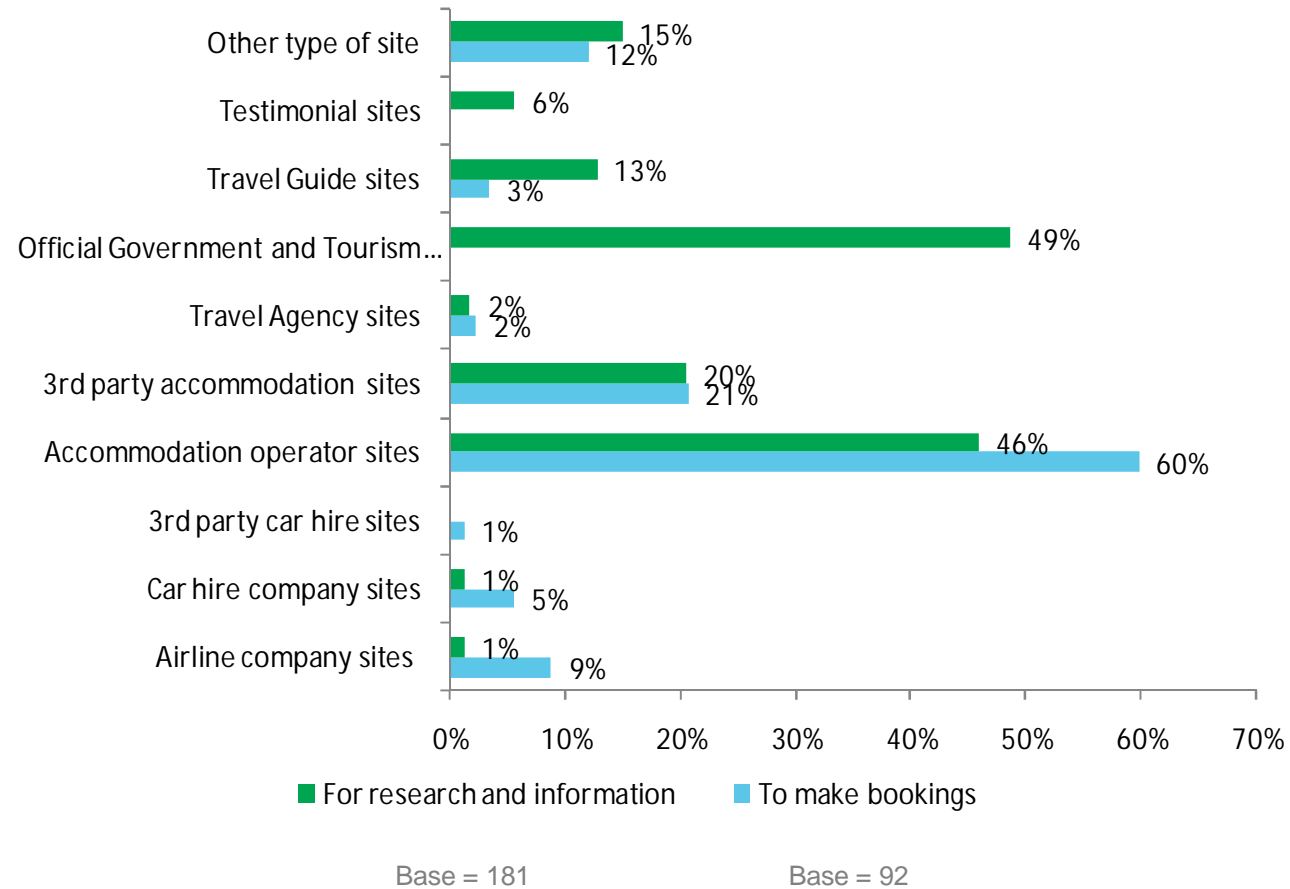


Note: 'Friends, relatives, been there before' may be used in combination with other categories (excludes 'No research')

Bases: Halls Gap - 214; Western Towns - 55; Eastern Towns - 33

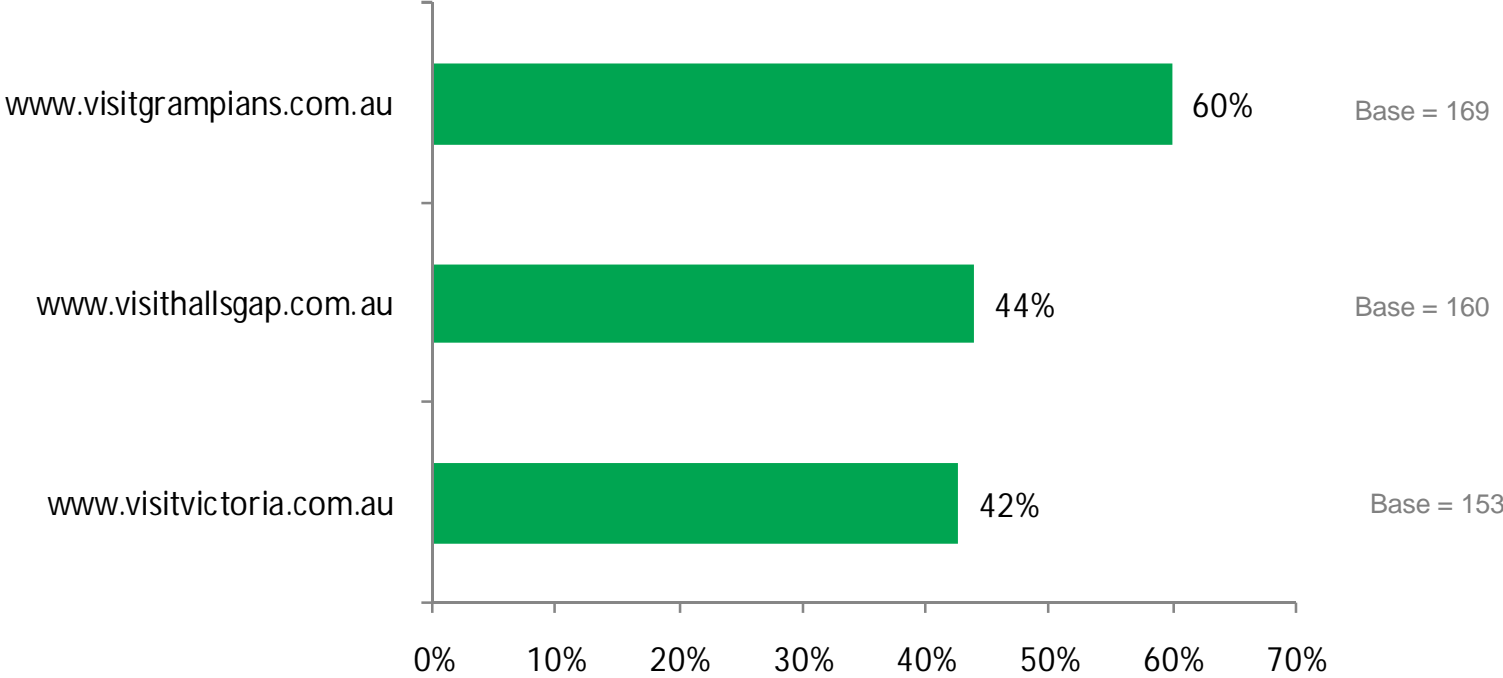
'Which of the following did you use to obtain information and/or make bookings for this trip to the Grampians region?'

Official Government sites and accommodation sites are the most visited



'You mentioned that you used the internet for research and/or booking. What are the type of websites you went to?'

www.visitgrampians.com.au the site used most by visitors



Bases differ as 'Don't know' have been excluded

'Did you visit and of the following specific websites prior to your trip to the Grampians region?'

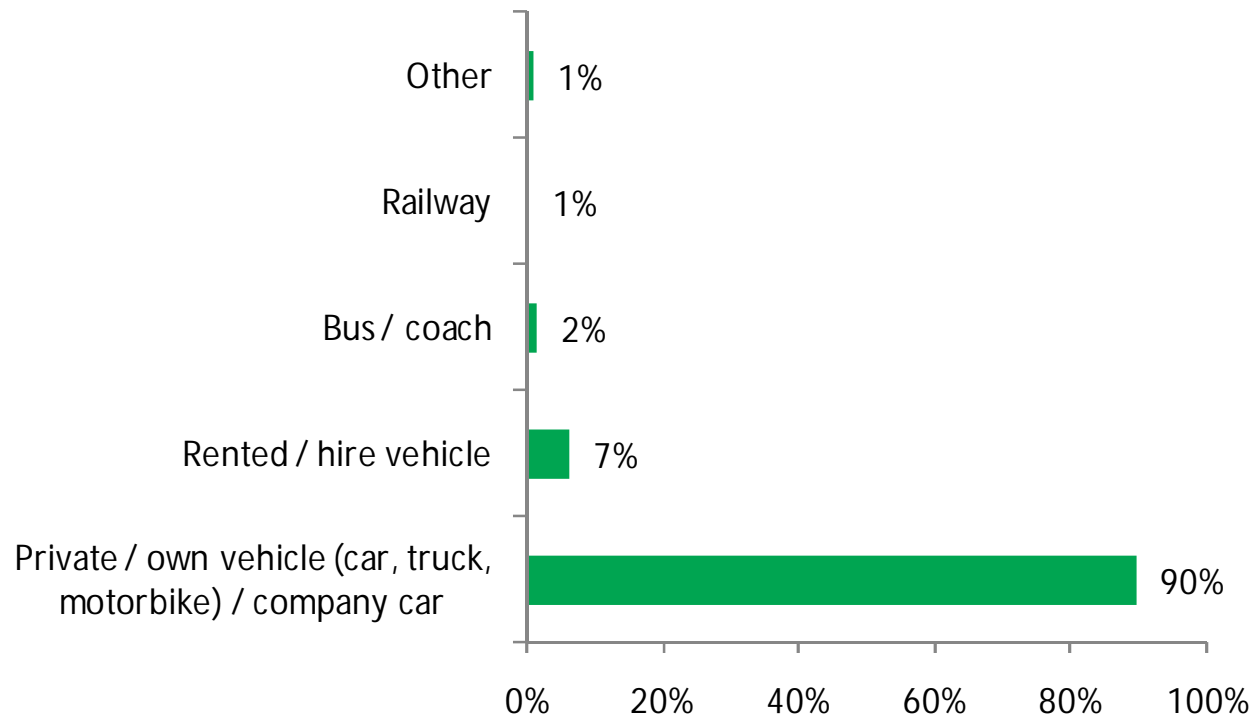
Summary – trip planning and booking

- Ø 72% of visitors in the survey were repeat visitors to the Grampians
- Ø Visitors to the Grampians had longer planning periods than the VPS benchmarks, 37% decided to visit more than 3 months before the trip compared with the VPS benchmark of 29%
- Ø About two thirds of first time visitors decided to visit at least 1 month prior to the trip
- Ø The internet was the most popular source of information on the Grampians and about one third (30%) of visitors used the internet only (possibly in combination with friend or relatives)
- Ø The proportion of visitors to the Grampians who did not make bookings was slightly above the VPS benchmark (45% v 39%)
- Ø www.visitgrampians.com.au was the site used most by visitors

Getting to and around the Grampians

- ∅ Transport used
- ∅ Route taken
- ∅ Other towns visited

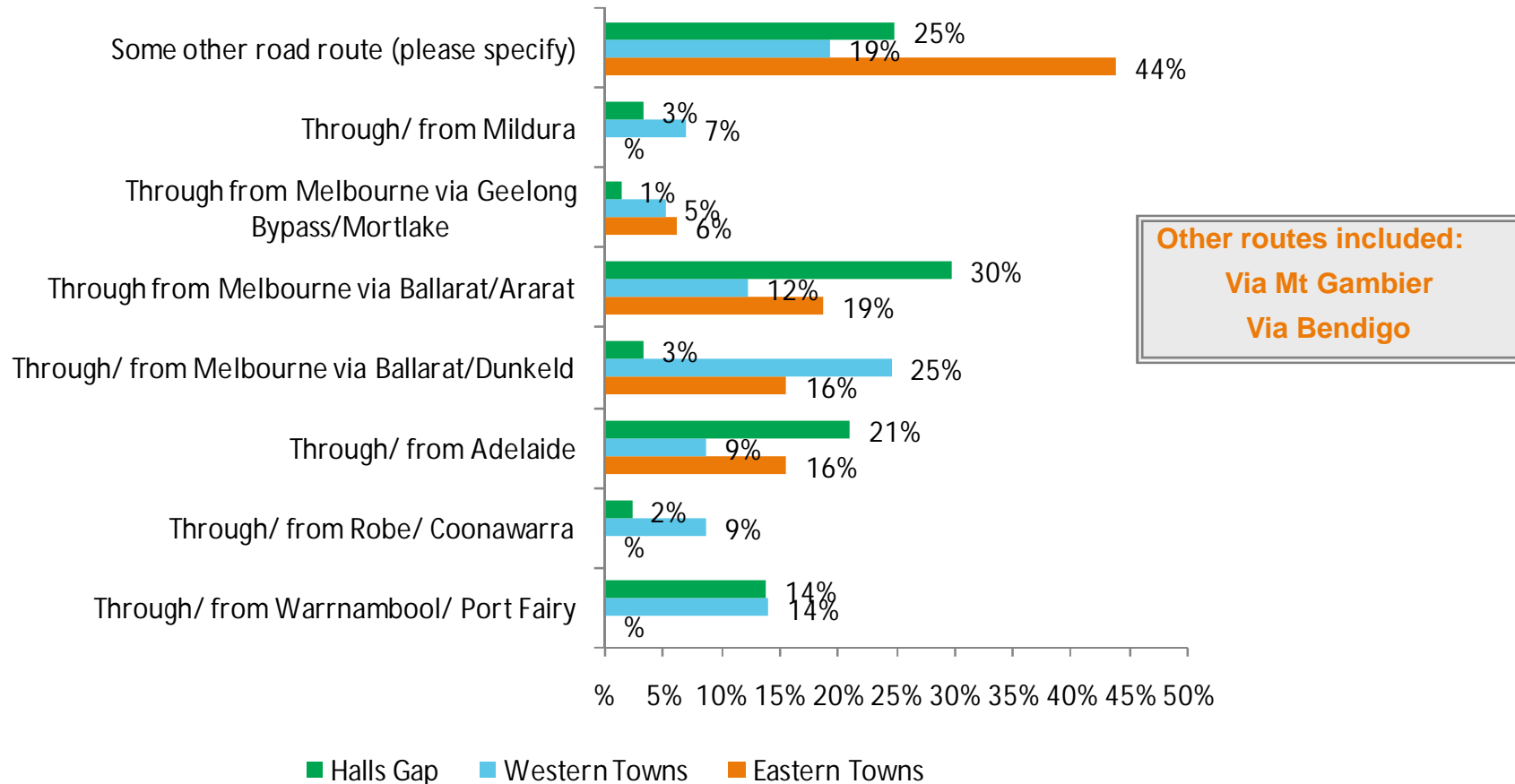
Nine in ten visitors used their own car



Base = 400

"What was the main form of transport that you used to get to the Grampians region today?"

Numbers travelling to the Grampians via the Geelong bypass were relatively low

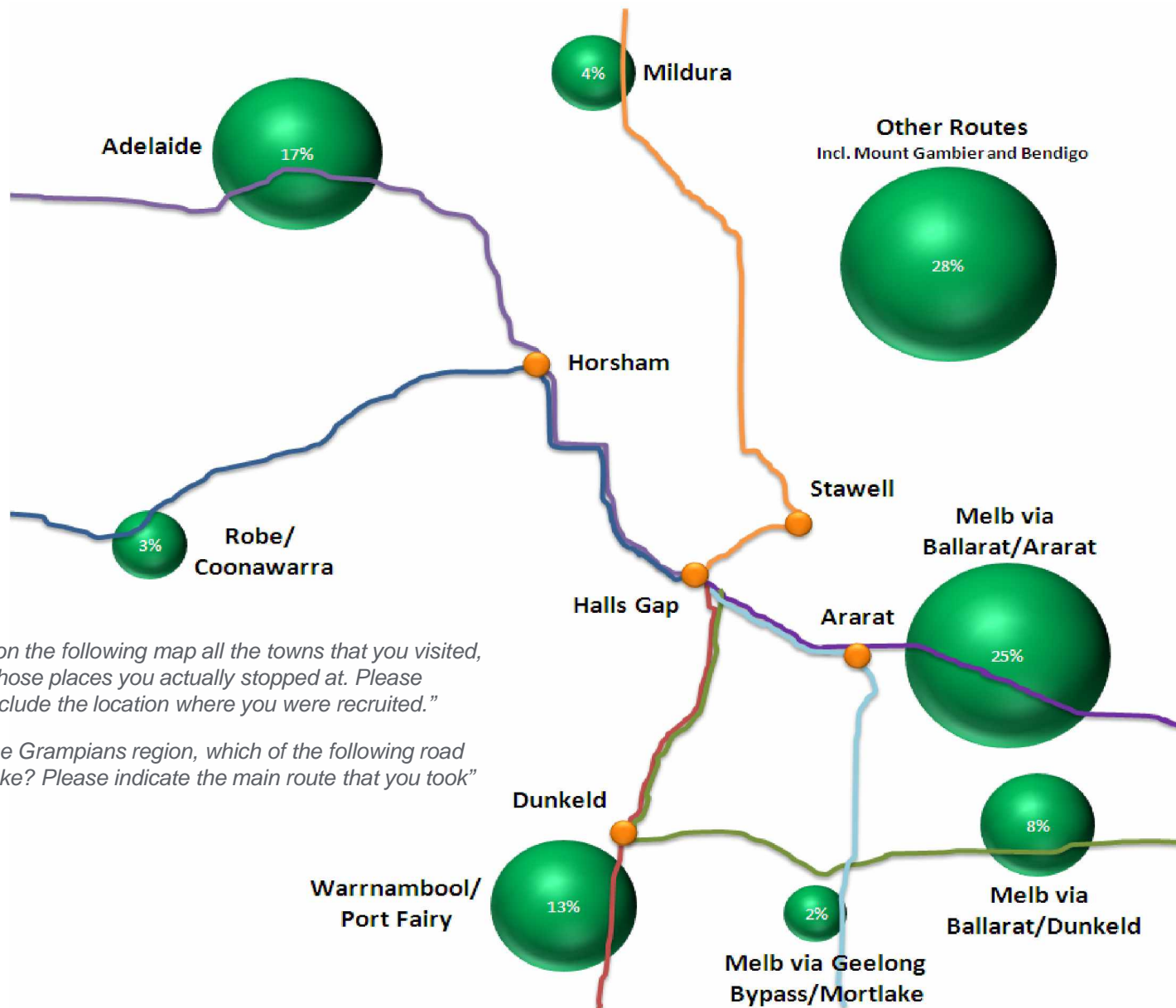


The most popular route for day visitors was Through from Melbourne via Ballarat/Ararat (23%)

Bases: Halls Gap - 209; Western Towns - 57; Eastern Towns - 32; Day - 53

“On this trip to the Grampians region, which of the following road routes did you take? Please indicate the main route that you took”

Routes to the Grampians region

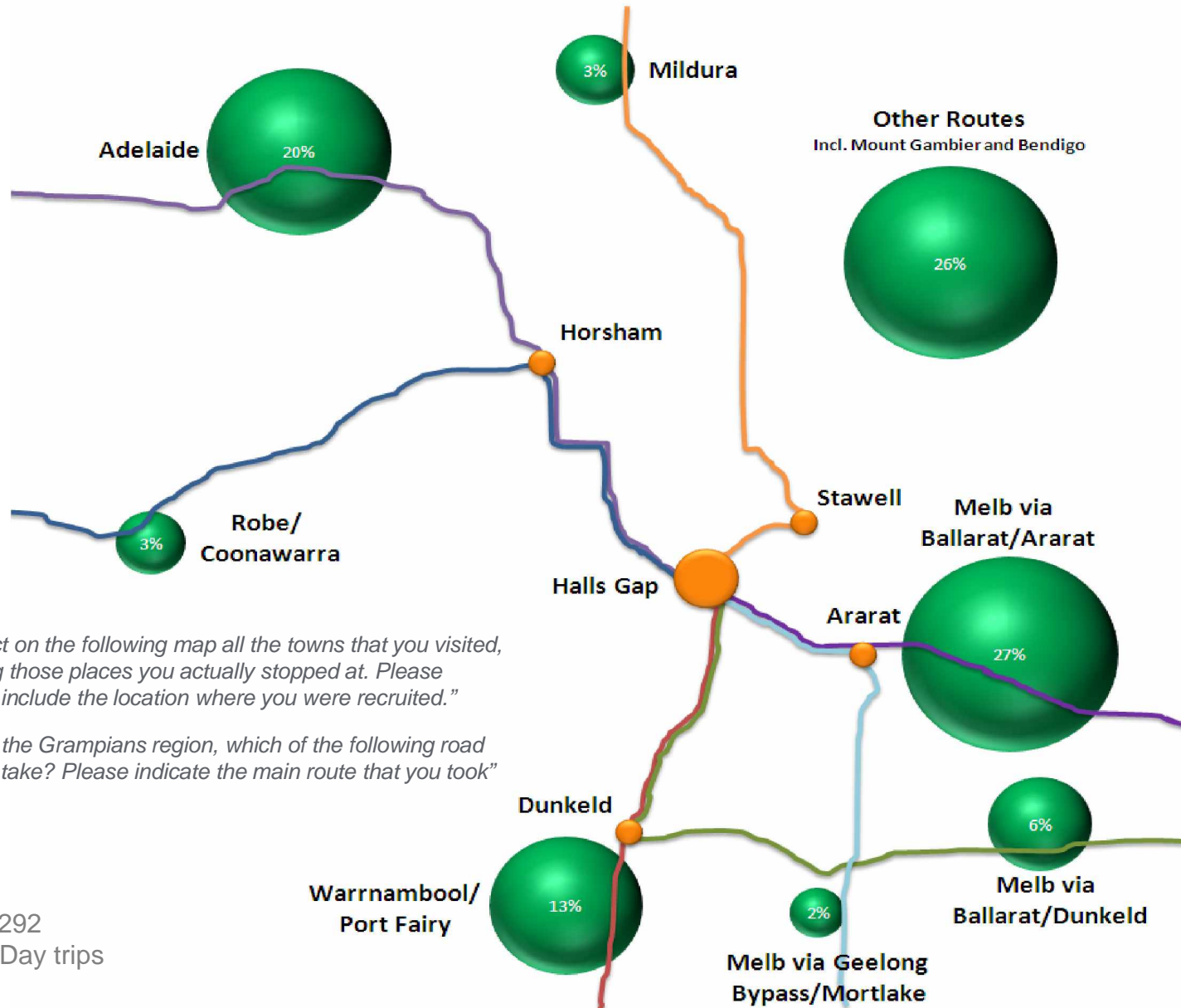


"Please select on the following map all the towns that you visited, only selecting those places you actually stopped at. Please remember to include the location where you were recruited."

"On this trip to the Grampians region, which of the following road routes did you take? Please indicate the main route that you took"

Base = 387

Routes for all visitors to Halls Gap

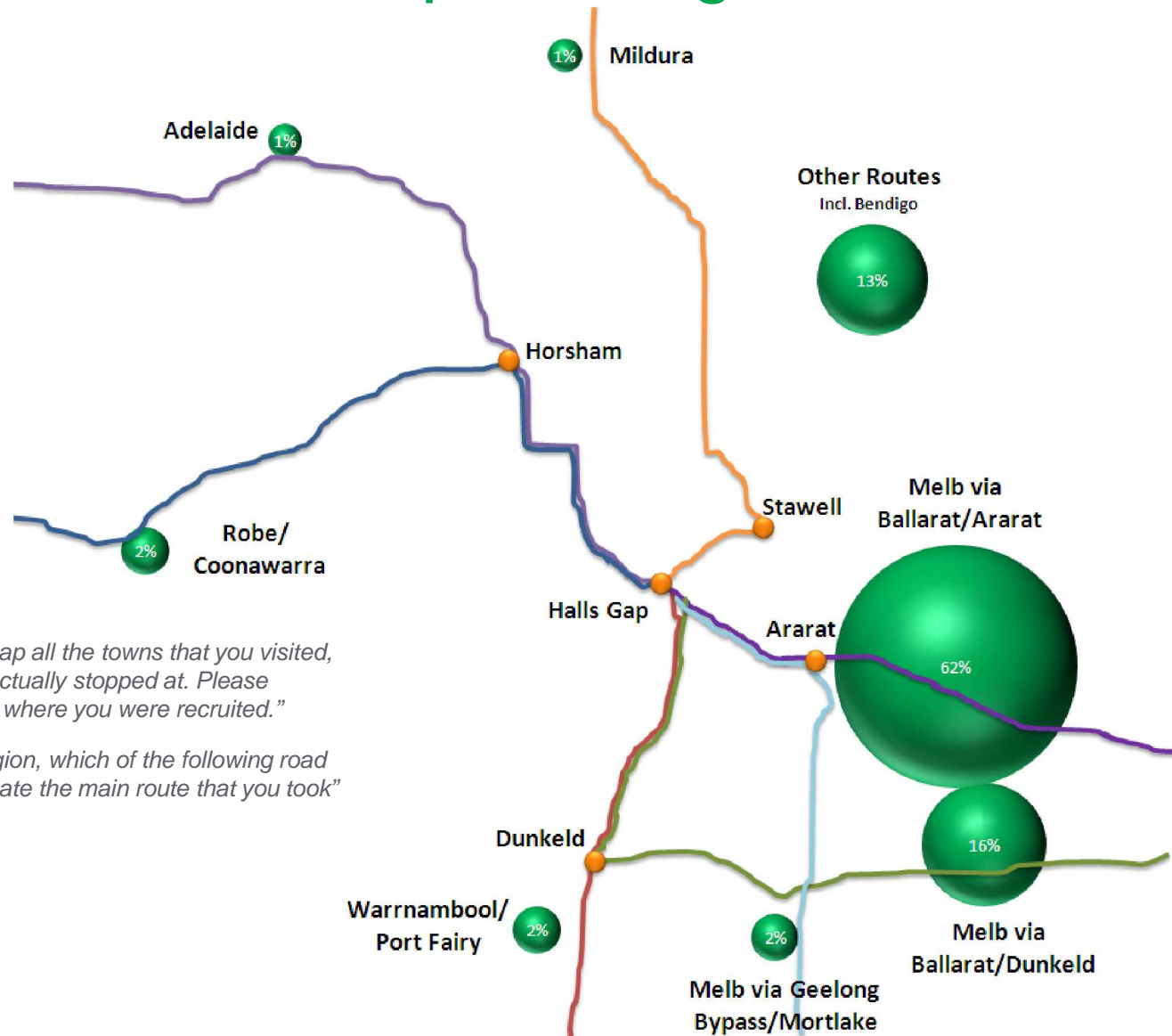


"Please select on the following map all the towns that you visited, only selecting those places you actually stopped at. Please remember to include the location where you were recruited."

"On this trip to the Grampians region, which of the following road routes did you take? Please indicate the main route that you took"

Base = 292
Include Day trips

Routes taken by Melbourne residents to the Grampians region



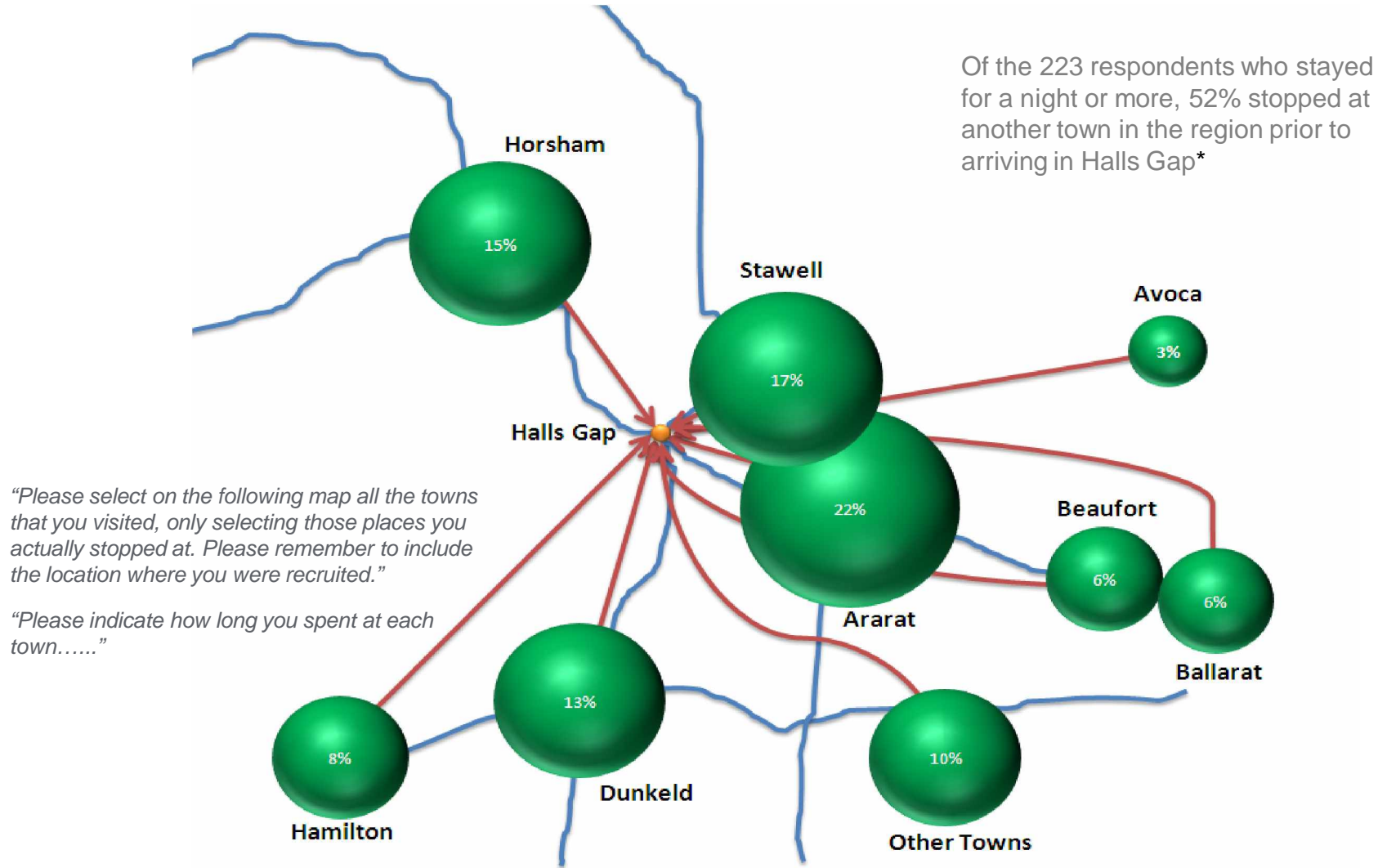
"Please select on the following map all the towns that you visited, only selecting those places you actually stopped at. Please remember to include the location where you were recruited."

"On this trip to the Grampians region, which of the following road routes did you take? Please indicate the main route that you took"

"What is your home postcode "

Base = 87

Day trip stops before a stopover in Halls Gap



Respondents= 117
Trips (Base) = 183

* This analysis is limited only to the towns shown on this map

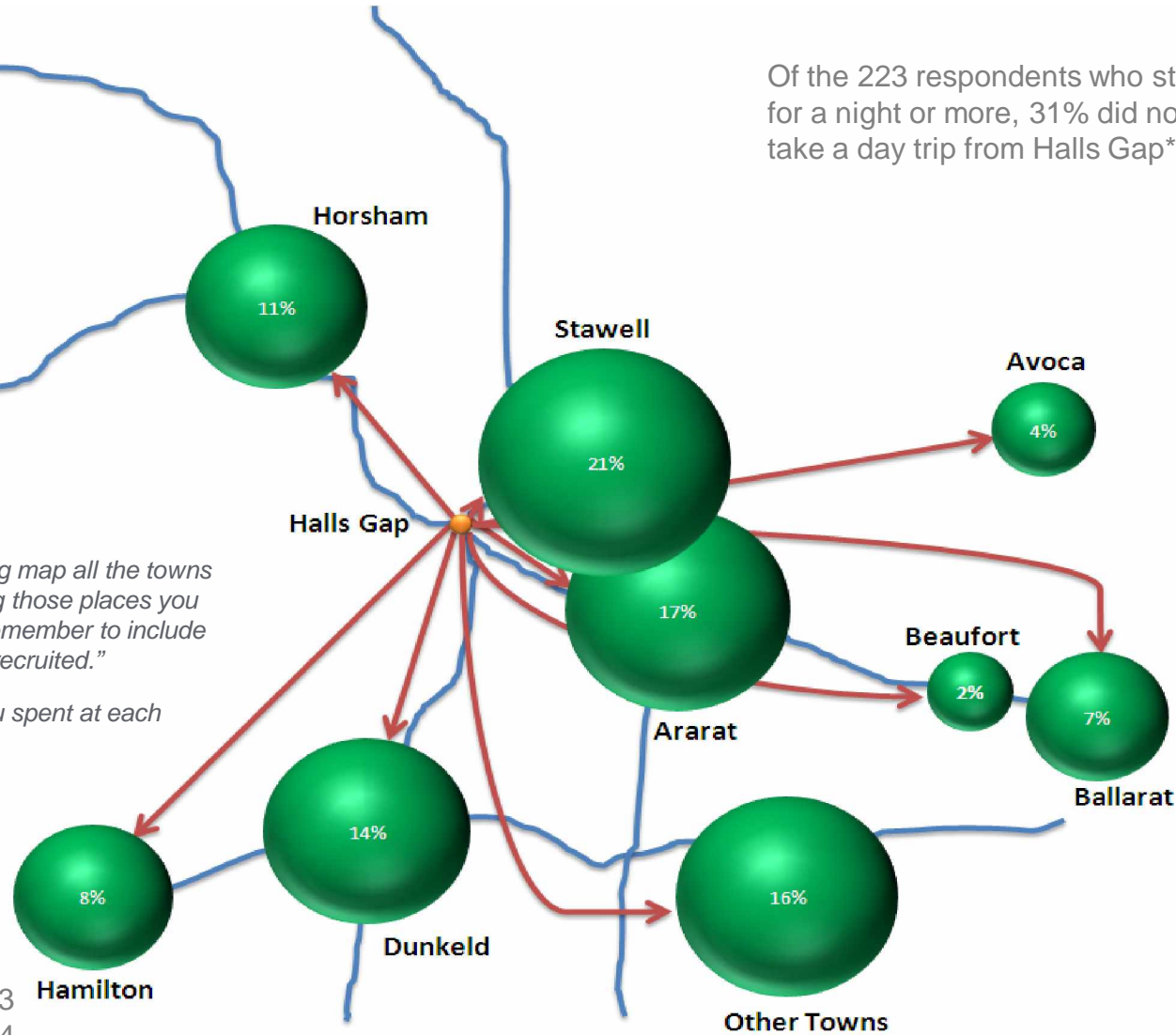
Day trips after a stopover in Halls Gap

Of the 223 respondents who stayed for a night or more, 31% did not take a day trip from Halls Gap*

"Please select on the following map all the towns that you visited, only selecting those places you actually stopped at. Please remember to include the location where you were recruited."

"Please indicate how long you spent at each town....."

Respondents = 153
Trips (Base) = 284



* This analysis is limited only to the towns shown on this map

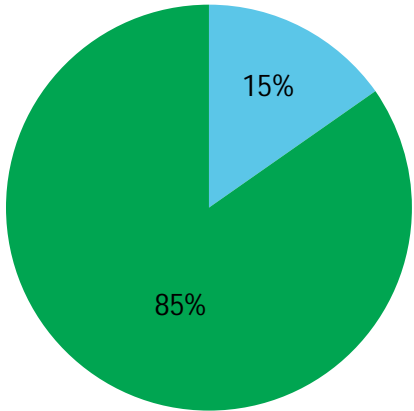
Summary – getting to and around the Grampians

- Ø 97% of visitors were in their own or a rented vehicle
- Ø There was no single route that dominates entry into the region – true of each of the sub-regions as well
- Ø Most Melbourne residents (62%) entered the region via Ballarat/Ararat.
- Ø 52% of overnight visitors to Halls Gap visited another town in the region before arriving in Halls Gap
- Ø 69% of overnight visitors to Halls Gap visited another town in the region after arriving in Halls Gap
- Ø On average each overnight Halls Gap visitor took 2.1 trips to other towns in the region during their stay.

Staying in the Grampians

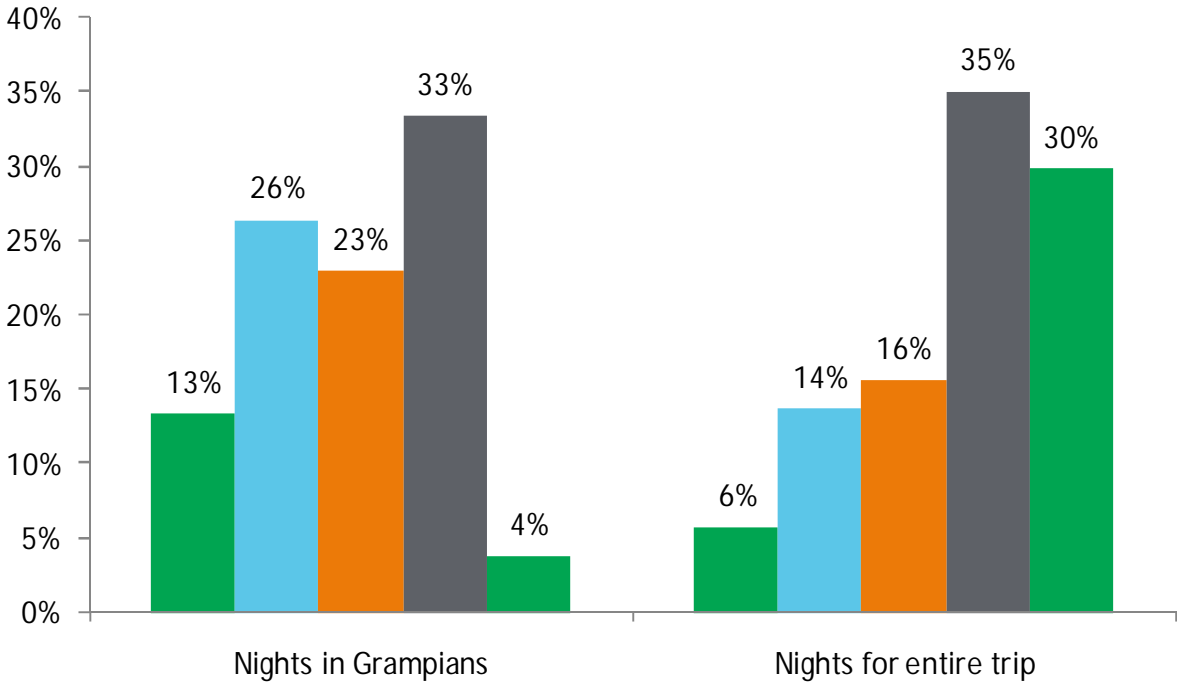
- ∅ Length of stay
- ∅ Accommodation used
- ∅ Expenditure

Most visitors staying between 2 and 7 nights in the region



■ Day visitors ■ Overnight visitors

Base = 406



■ 1 night ■ 2 nights ■ 3 nights ■ 4-7 nights ■ 8+ nights

Base = 344

Base = 365

Benchmarks for nights at a destination

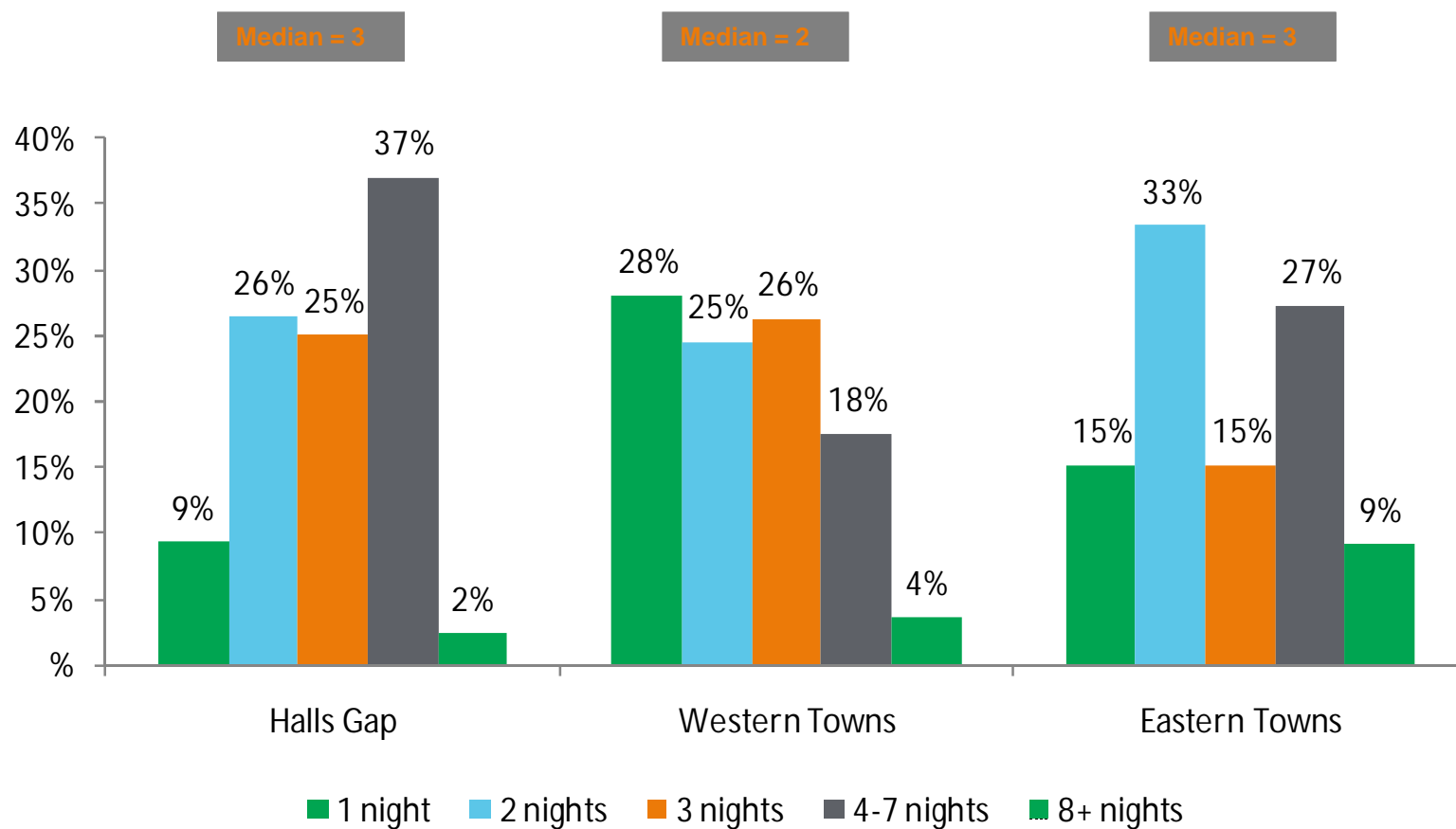


■ 1 night ■ 2 nights ■ 3 nights ■ 4-7 nights ■ 8+ nights

“How many nights did you stay in the Grampians region during this trip?”

“In total, how many nights did you stay away from home for your entire trip?”

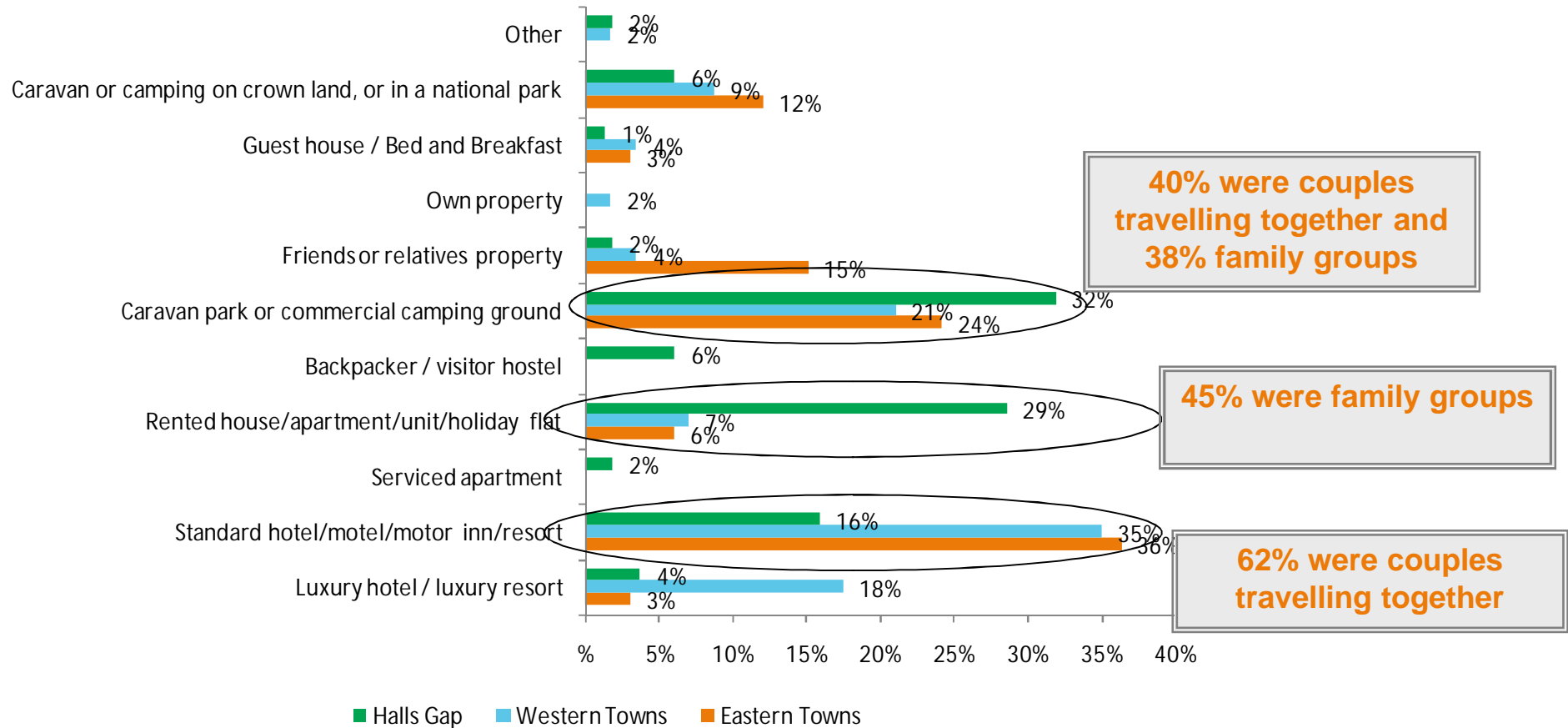
A greater share of visitors to Halls Gap stayed 4 to 7 nights



Bases: Halls Gap - 216; Western Towns - 57; Eastern Towns - 33

"How many nights did you stay in the Grampians region during this trip?"

The Grampians caters to a range of accommodation needs



40% were couples travelling together and 38% family groups

45% were family groups

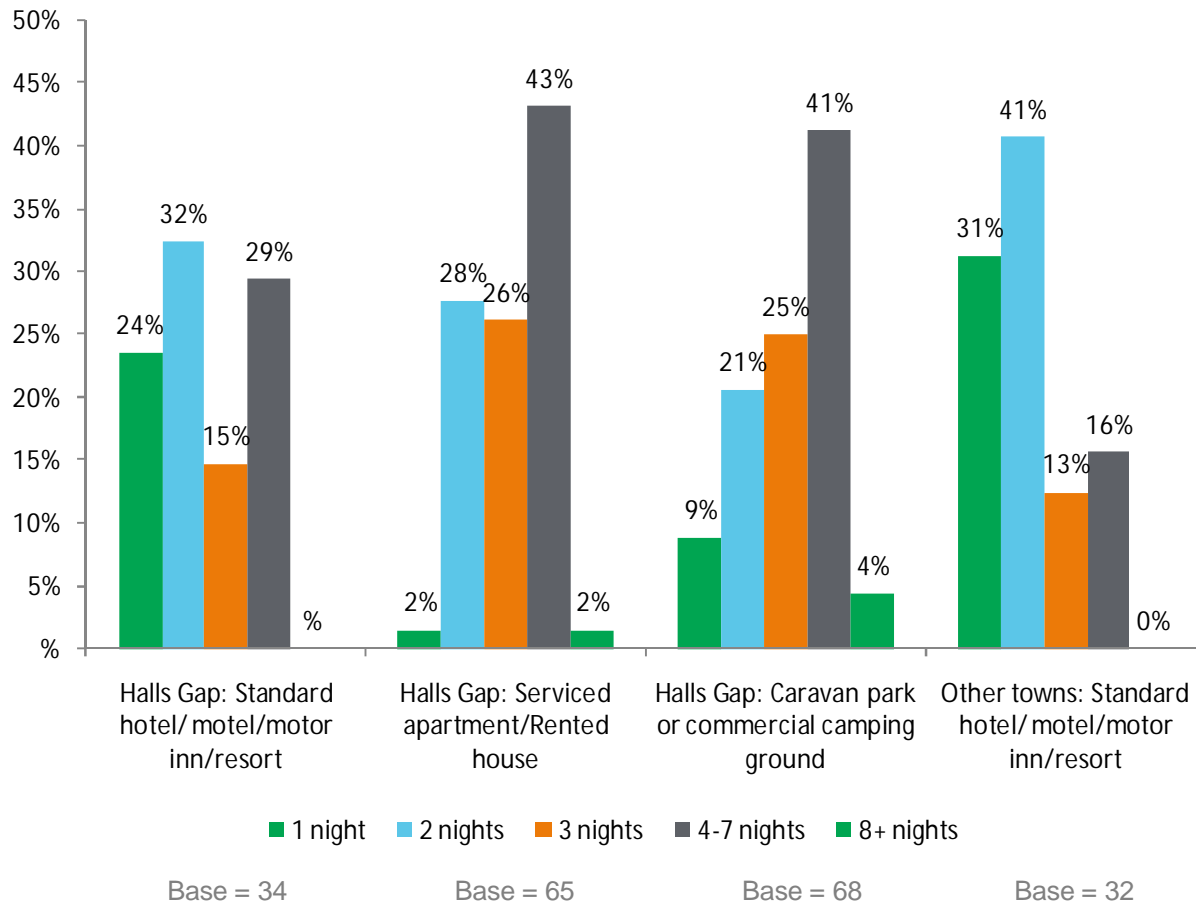
62% were couples travelling together

VPS benchmarks:
 Caravan park or commercial camping ground: 23%
 Rented house/apartment/unit/holiday flat: 9%
 Standard hotel/motel/motor inn/resort: 21%

Bases: Halls Gap - 213; Western Towns - 57; Eastern Towns - 33

“What type of accommodation did you mainly use in the Grampians region?”

Length of stay for Serviced apartments and Caravan parks in Halls Gap had a similar patterns

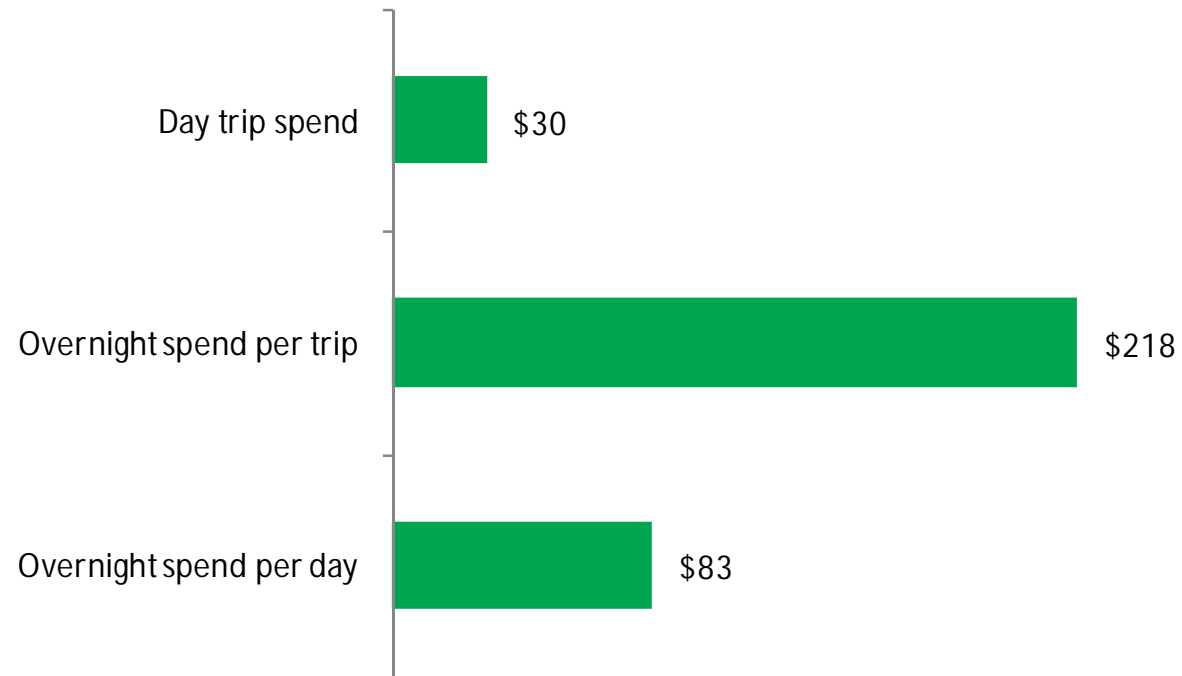


More than 4 in 10 visitors in Halls Gap spent between 4 and 7 nights in Serviced apartments and Caravan parks

“How many nights did you stay in the Grampians region during this trip?”

“What type of accommodation did you mainly use in the Grampians region?”

Expenditure



Bases: Day trip – 76; Overnight – 316
Note: From recruitment data file

“How much have you spent so far in the Grampians region, including any money paid before the trip, and excluding any package expenditure?”
“How much do you think you will spend in the Grampians region for the remainder of your stay excluding any package expenditure?”

Summary – staying in the Grampians

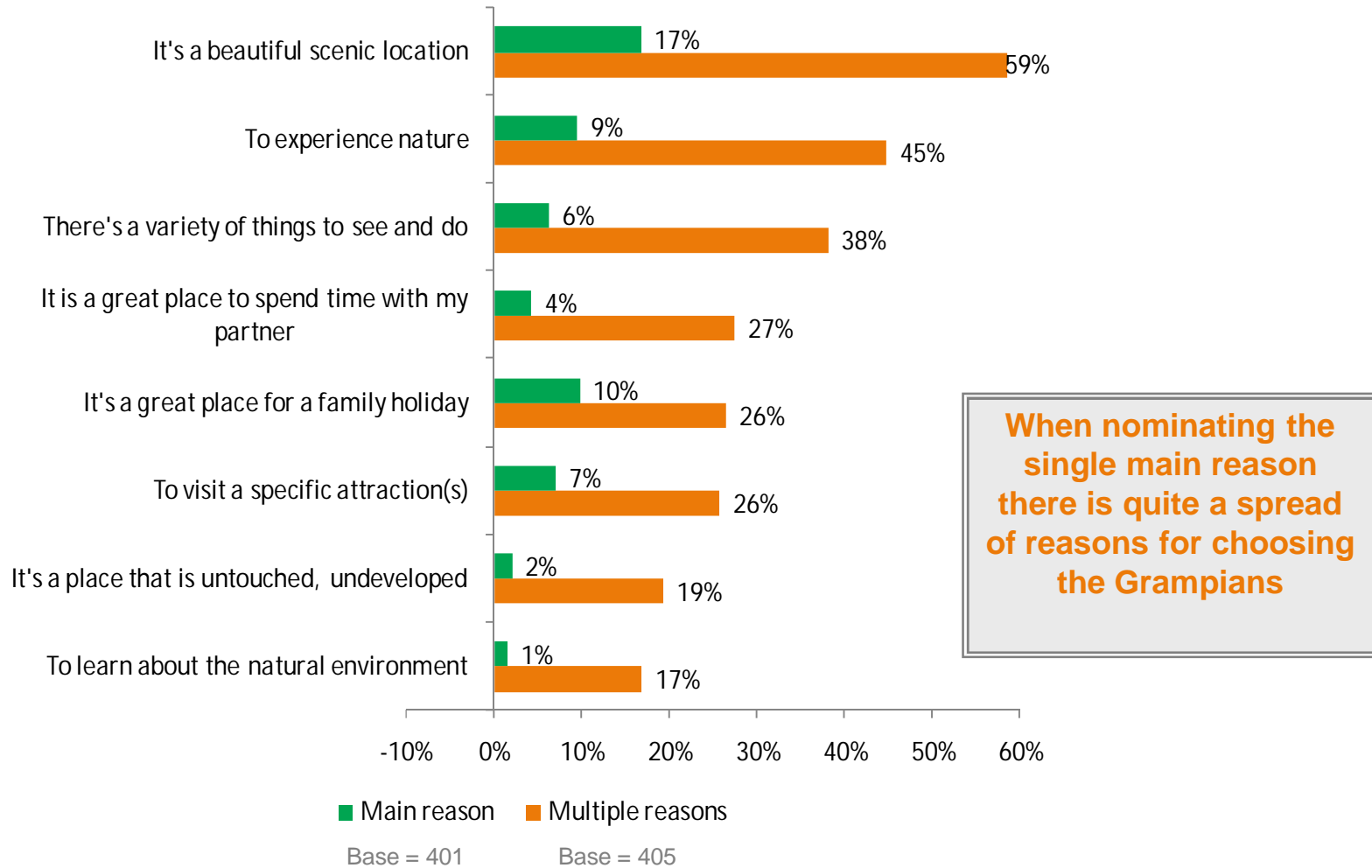
- Ø Most visitors stayed between 2 and 7 nights in the region (82%)
- Ø Visitors to Halls Gap were spread evenly between caravan park/commercial camping grounds (32%) and rented house/apartments (29%)
- Ø The most common length of stay in Halls Gap in caravan parks/commercial camping grounds and in rented house/apartments was 4-7 days (41% and 43% respectively)
- Ø Standard hotel/motel/motor inn/resort was more common in the Western and Eastern Towns (35% and 36% respectively)

Why they visited the Grampians and were
they happy

Reasons for visiting

- ∅ Perceptions of the Grampians
- ∅ Reasons for choosing destination
- ∅ Expectations of experiences

Nature based experiences dominate the reasons for choosing to visit the Grampians



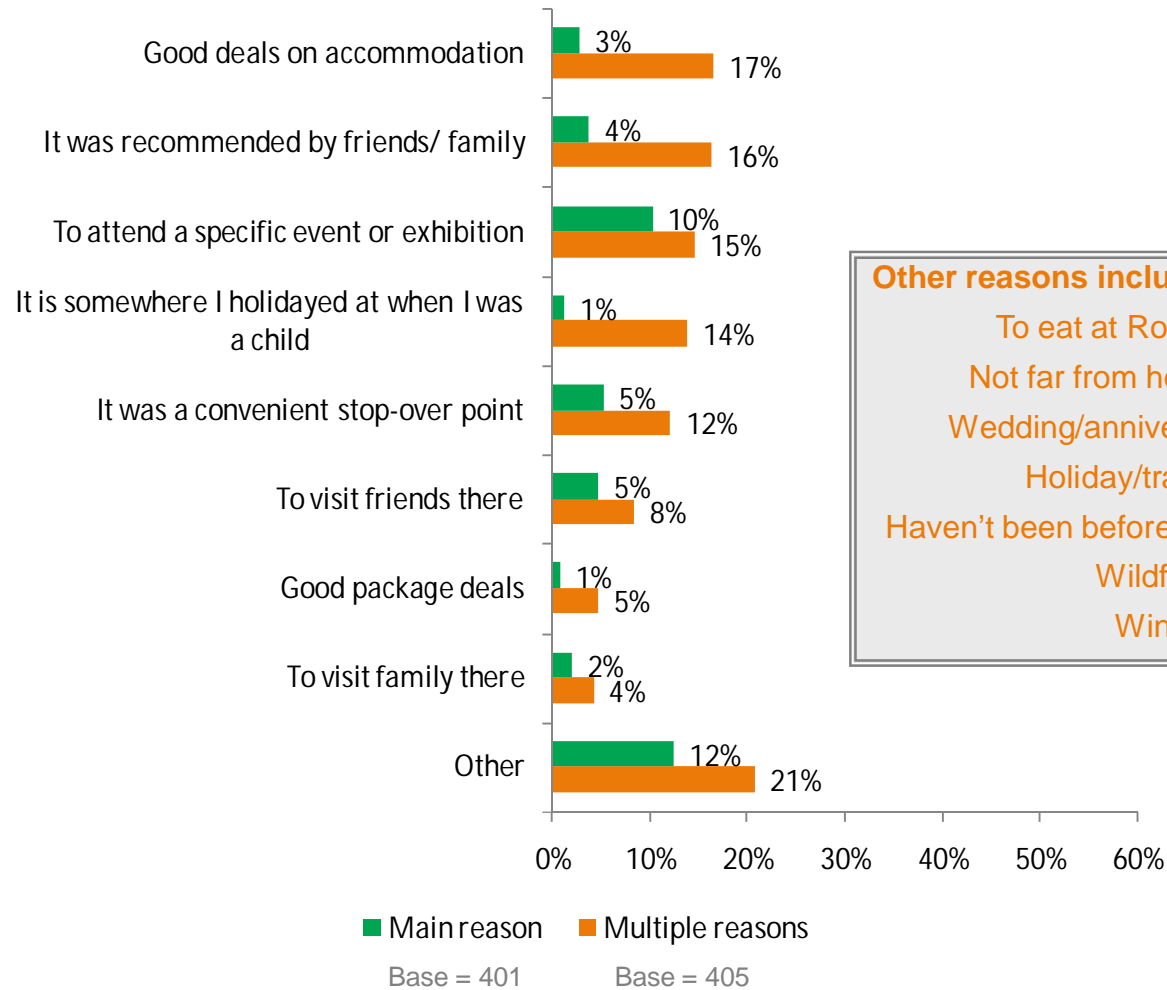
When nominating the single main reason there is quite a spread of reasons for choosing the Grampians

"Why did you chose the Grampians region?"

"Which of the following was the most important in choosing the Grampians region?"

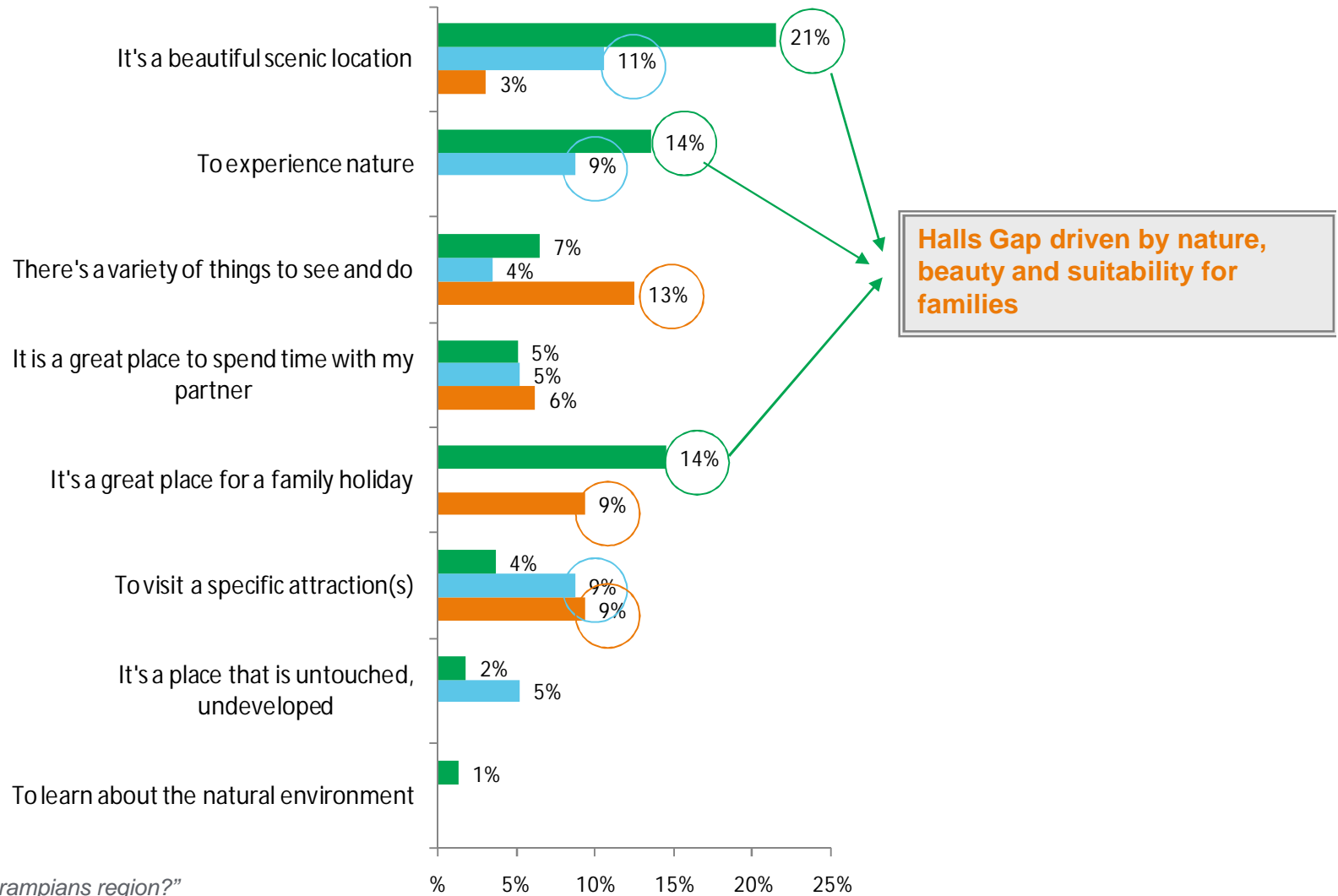
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Other reasons included (all small %'s):
To eat at Royal Mail Hotel
Not far from home/Melbourne
Wedding/anniversary/to propose
Holiday/travel auction
Haven't been before/always wanted to go
Wildflowers
Wineries

The most important reason varies – a broader range for Western and Eastern towns



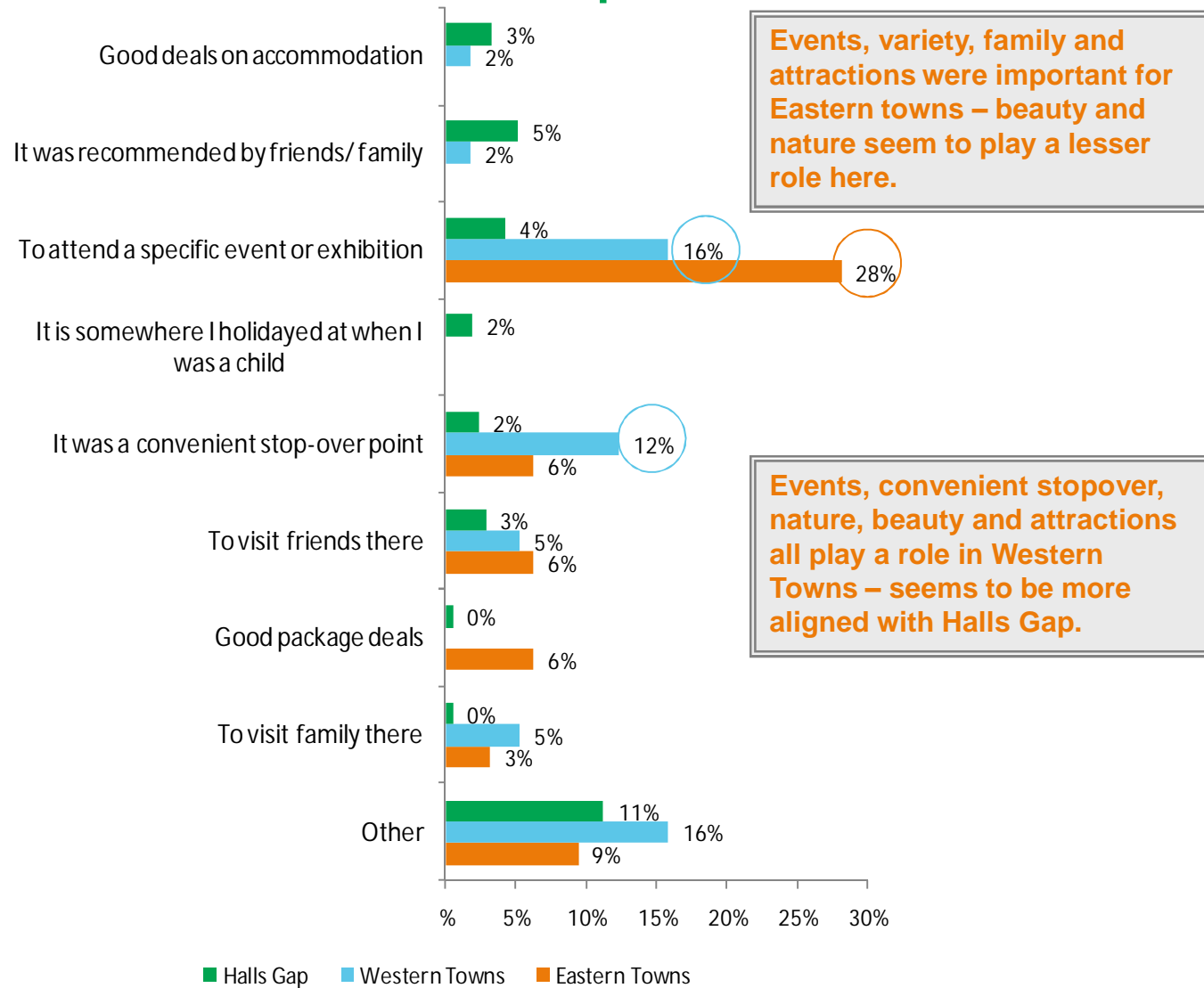
"Why did you chose the Grampians region?"

"Which of the following was the most important in choosing the Grampians region?"

■ Halls Gap ■ Western Towns ■ Eastern Towns

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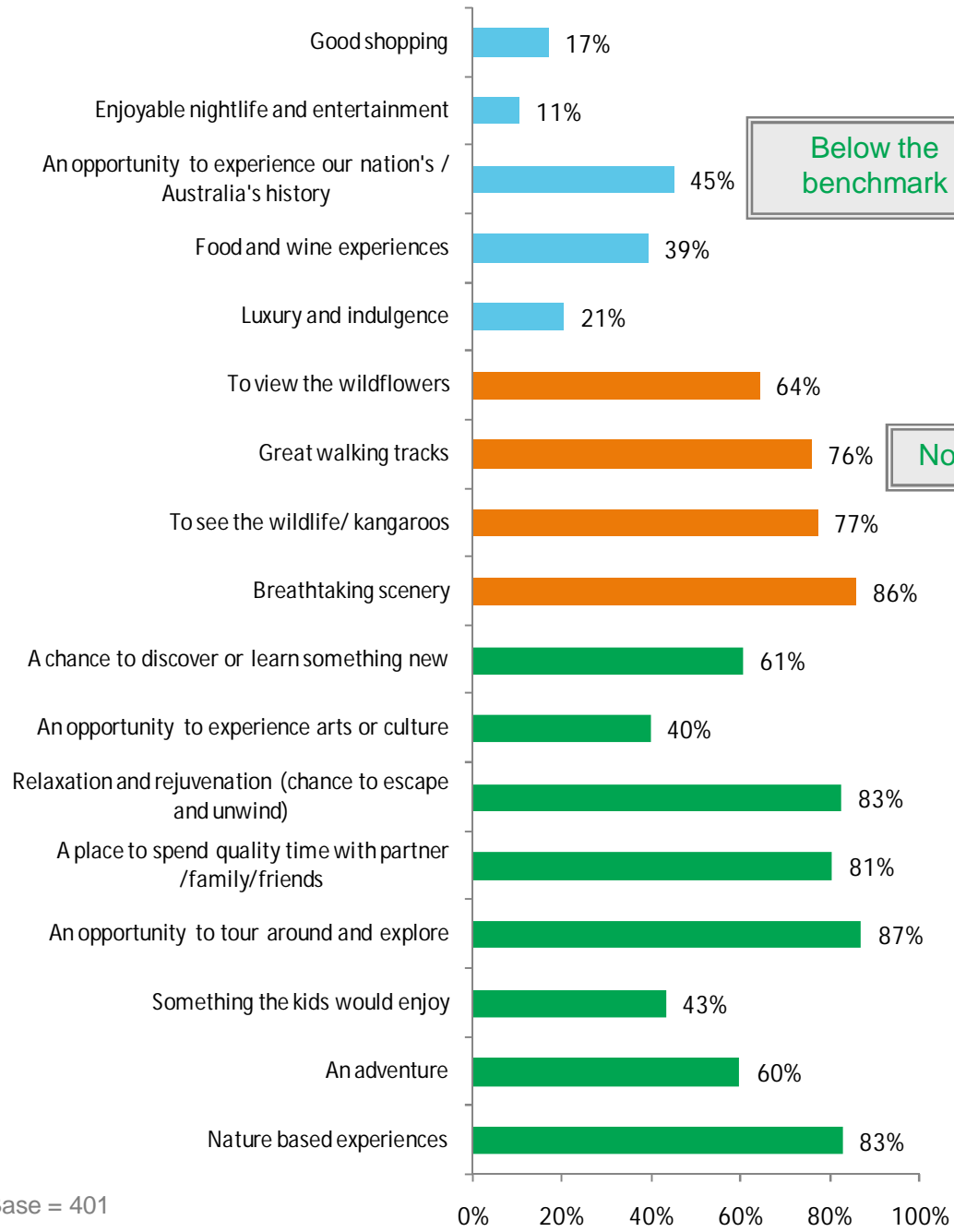
Events, variety, family and attractions were important for Eastern towns – beauty and nature seem to play a lesser role here.

Events, convenient stopover, nature, beauty and attractions all play a role in Western Towns – seems to be more aligned with Halls Gap.

Bases:
 Halls Gap - 214;
 Western Towns - 57;
 Eastern Towns – 32;
 Day - 60

To attend a specific event or exhibition (22%) or to visit specific attractions (15%) were the single main reasons for day visitors to visit the Grampians.

Expectations of experiences continue the theme of nature, relax, family...



Base = 401

Below the benchmark

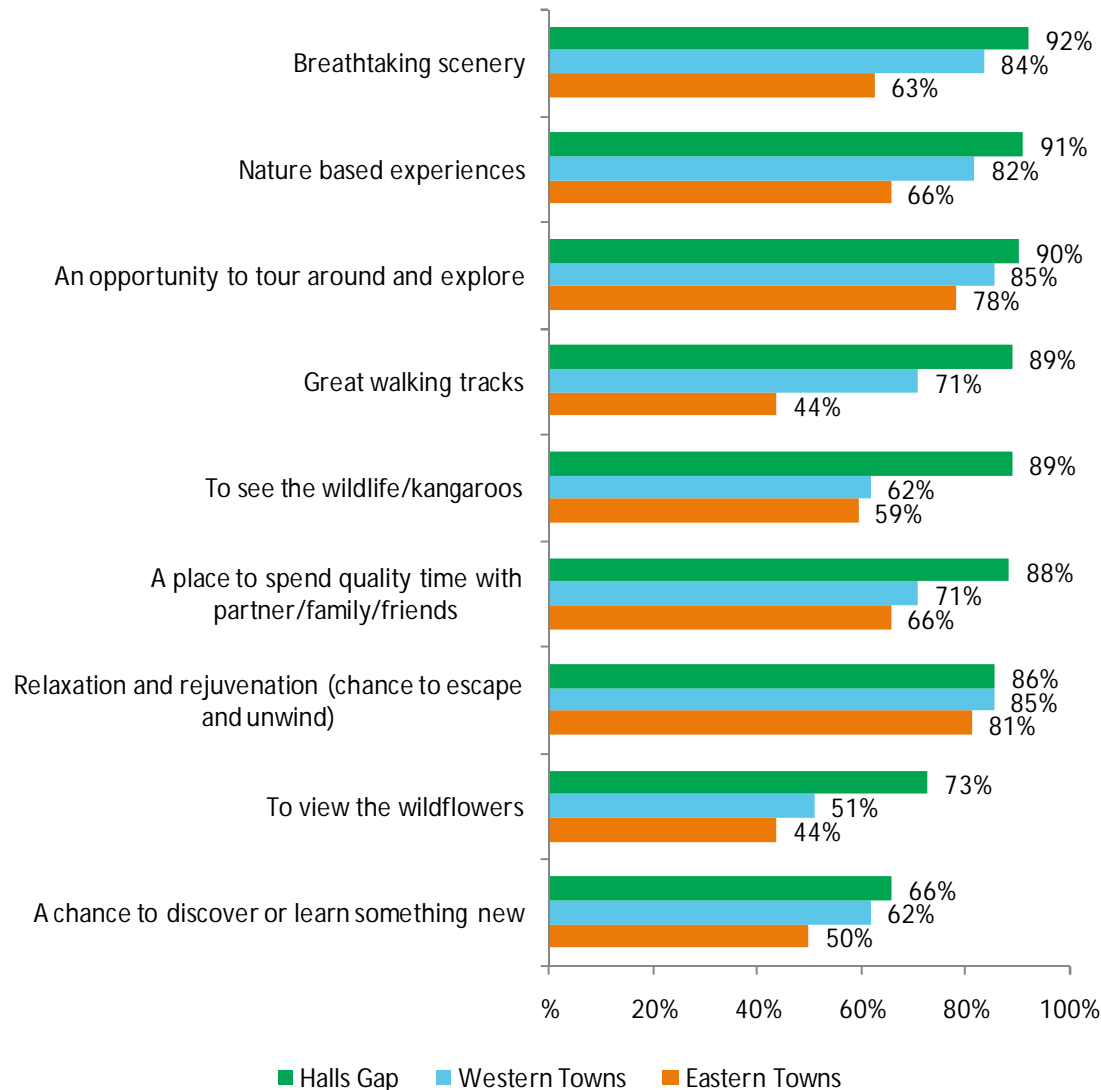
Not benchmarked

Nature experiences (flora, fauna and natural features), relaxing and spending time with family and friends are the important experiences. Adventure and touring around and exploring are other key experiences.

Above the benchmark

"Which, if any, of the experiences listed below did you expect the Grampians region to offer?"

There were some differences in experiences expected by location

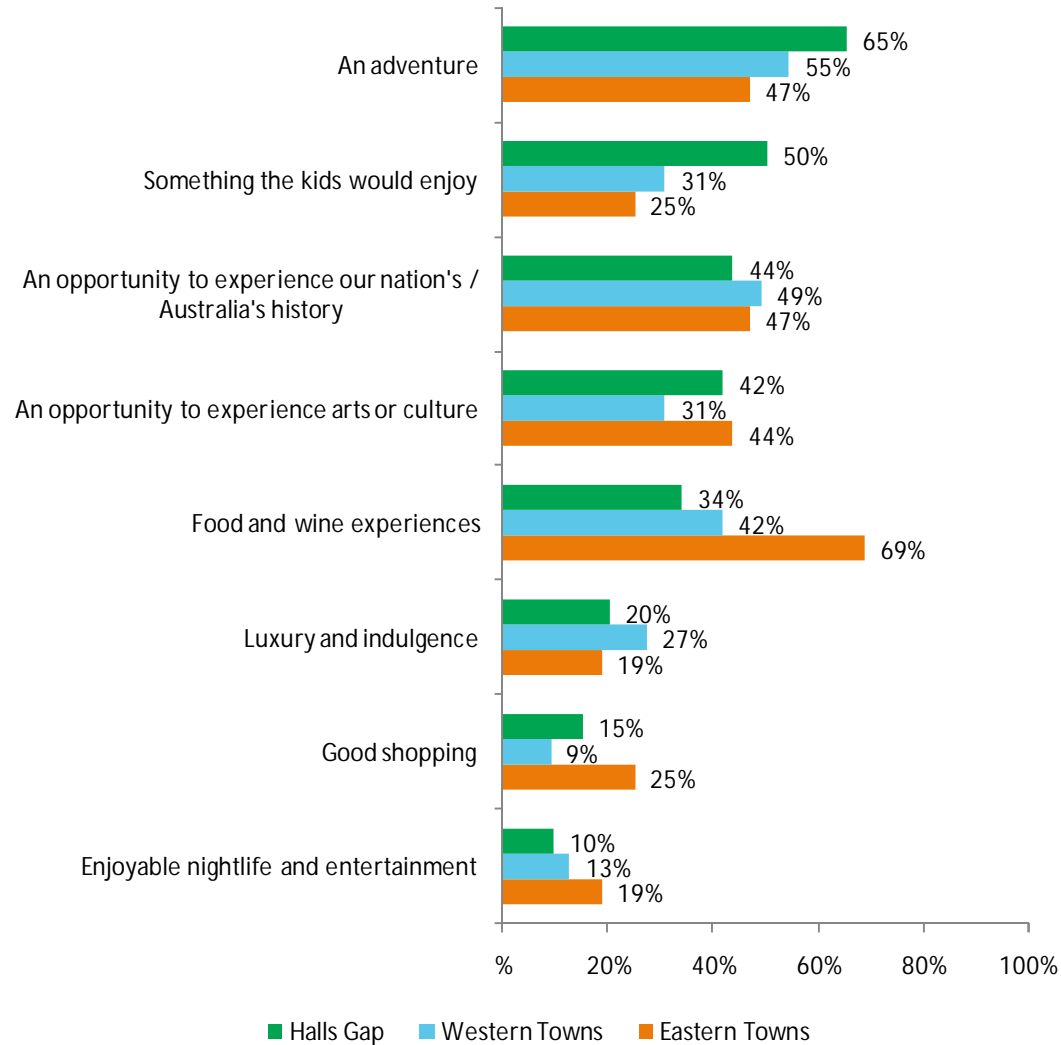


On the whole expectations of experiences were similar with a couple of exceptions: expectations of food and wine experiences are more likely for visitors staying in Eastern towns and in general they are less likely to be expecting nature based experiences.

“Which, if any, of the experiences listed below did you expect the Grampians region to offer?”

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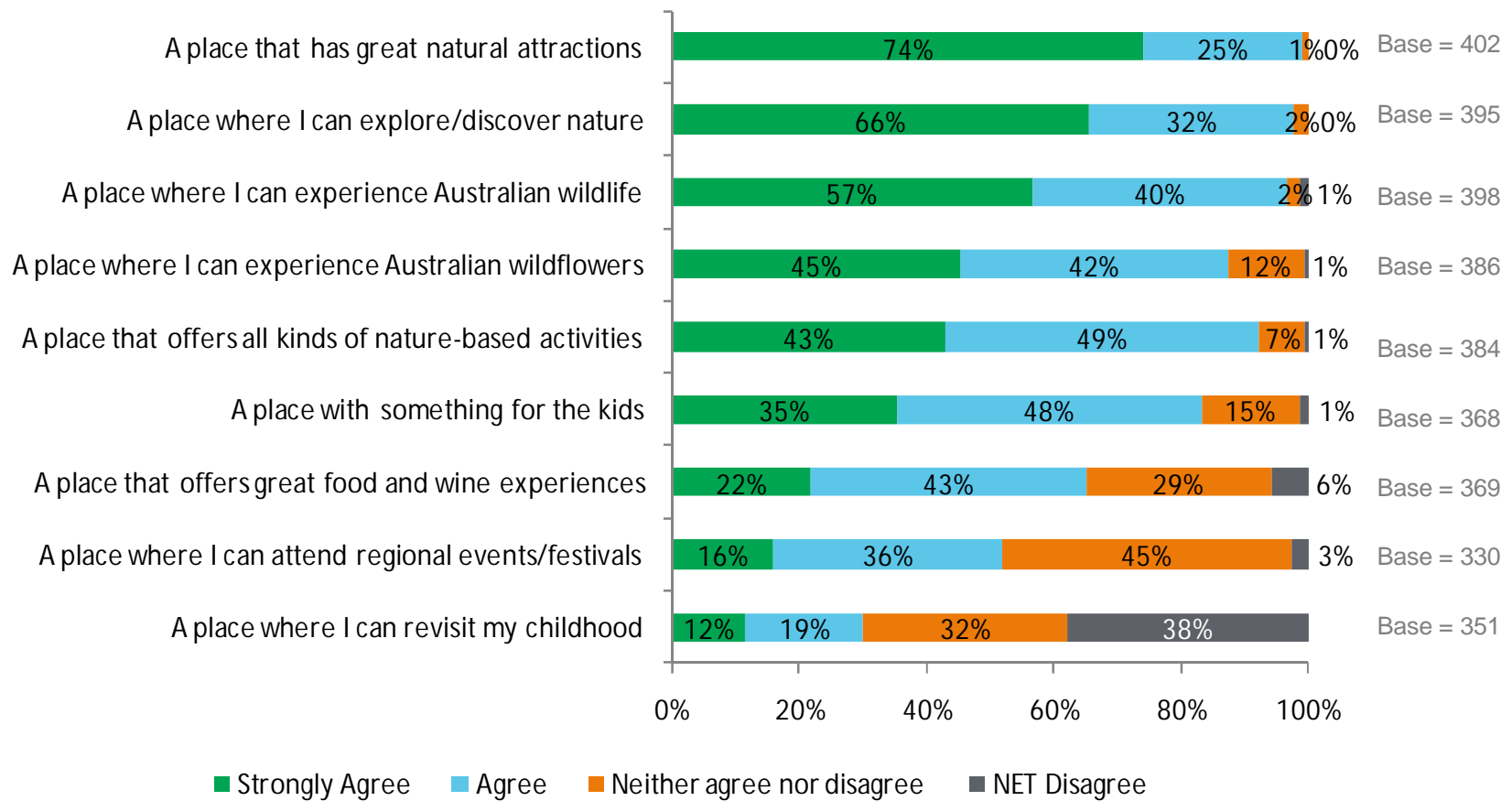
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Bases:
Halls Gap - 217;
Western Towns - 55;
Eastern Towns - 32;
Day - 59

About three quarters of day trip visitors expected to tour around and explore (78%), breathtaking scenery (75%) and to relax and rejuvenate (73%)

Perceptions that the Grampians offers nature based experiences are very strongly held – true for flora, fauna and natural features



“Thinking about the Grampians region, how much do you agree or disagree that the Grampians region is...?”

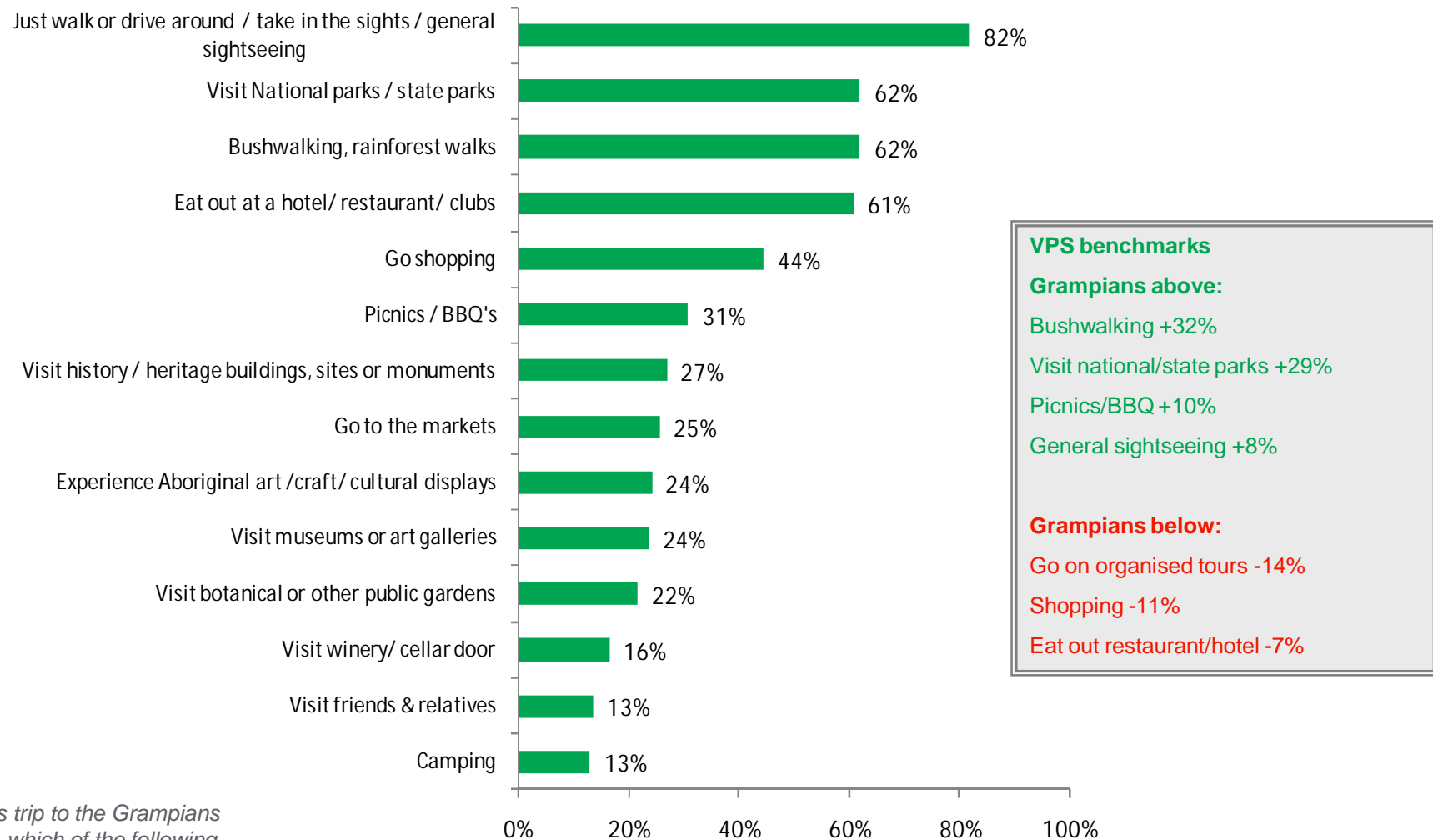
Summary – reasons for visiting

- Ø It's a beautiful scenic location (21%), to experience nature (14%) and it's a great place for a family holiday (14%) are the main reasons nominated by Halls Gap visitors for choosing the Grampians.
- Ø Reasons for choosing the Grampians as nominated visitors to Western Towns were more varied but do align with the key Halls Gap reasons: to attend a specific event (16%), convenient stop over (12%), it's a beautiful scenic location (11%), to experience nature (9%), to visit a specific attraction (9%).
- Ø Reasons for choosing the Grampians as nominated visitors to Eastern towns were also varied and presents a different profile to the other two sub-regions: to attend a specific event (28%), there's a variety of things to see and do (13%), to visit a specific attraction (9%), it's a great place for a family holiday (9%). The scenery and nature do not figure in main reasons.
- Ø Expectations of experiences continue the theme of nature, relaxing and family. The opportunity to tour around and explore is also a common expectation (87%).
- Ø Although the main reasons for choosing the Grampians varied by sub-region as far as experiences went there was little variation with one notable exception: 69% of visitors to the Eastern Towns expected to have a food and wine experience. The corresponding figure for Halls Gap was 34% and the Western Towns 42%.

What did they do in the Grampians?

- ∅ Activities
- ∅ Attractions

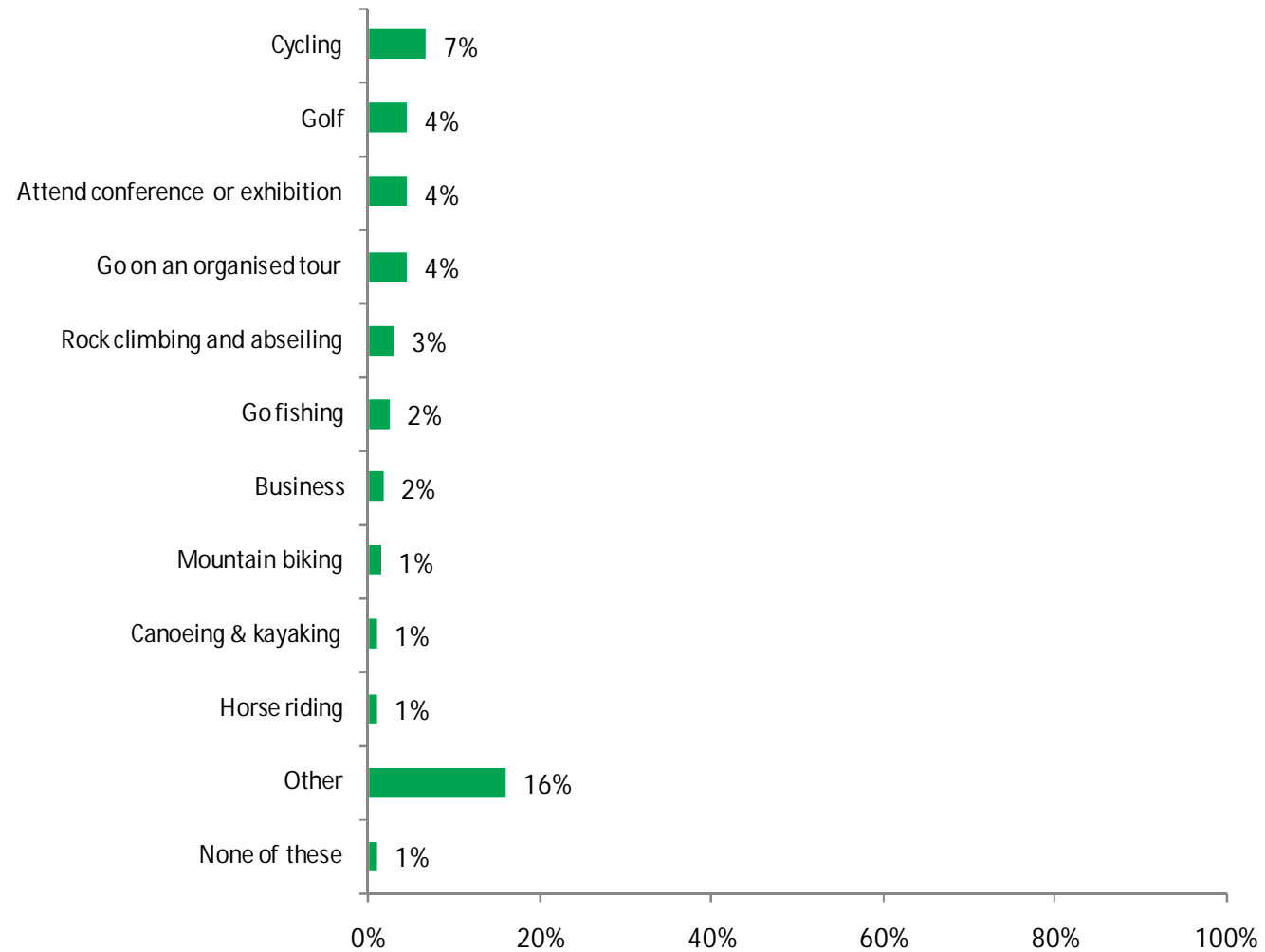
General sightseeing was the most popular activity



“On this trip to the Grampians region, which of the following activities did you undertake?”

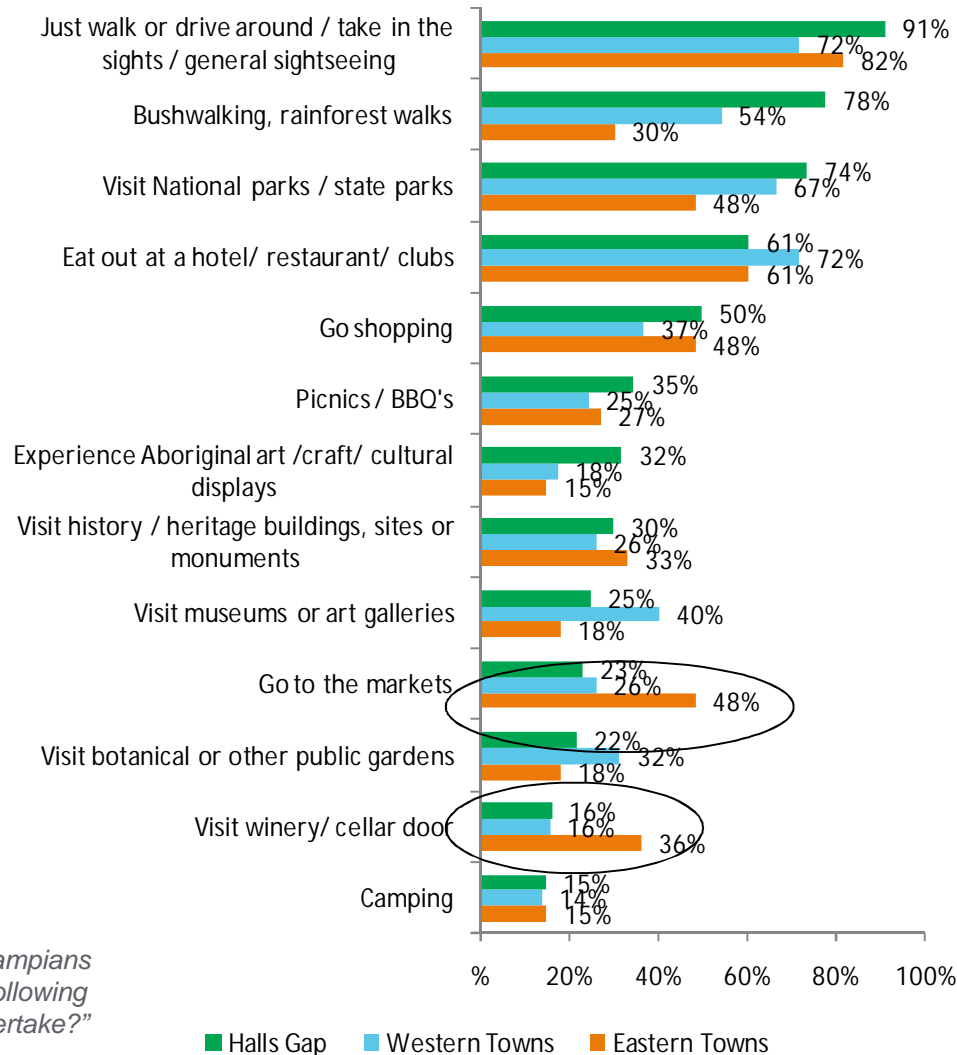
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Base = 404

General sightseeing was the most popular activity for all destination groups

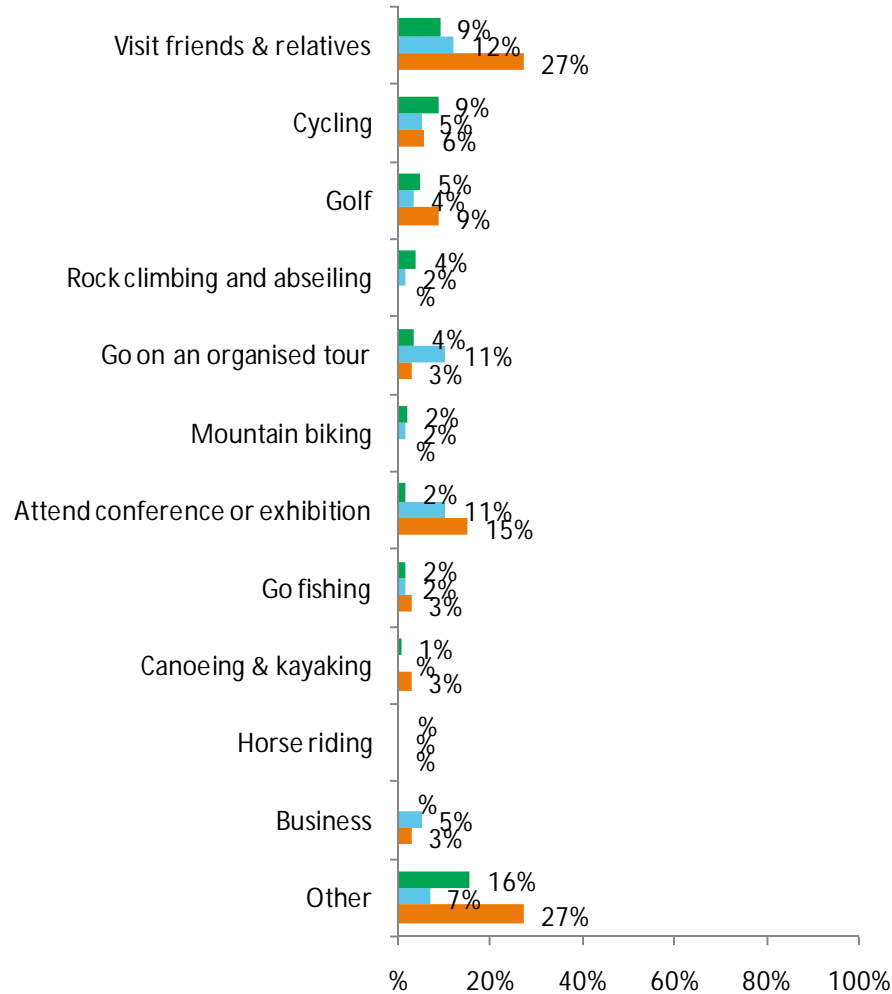


Eastern towns had the largest % of people visiting markets and wineries. However a sizeable minority staying in Halls Gap and Western Towns did as well

“On this trip to the Grampians region, which of the following activities did you undertake?”

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Nearly 3 in 10 visitors to Eastern Towns visited friends and relatives

Other activities included (all small %'s):

- Visit the zoo
- Wildflower festival
- Mini golf
- Avoca races
- Volunteer work

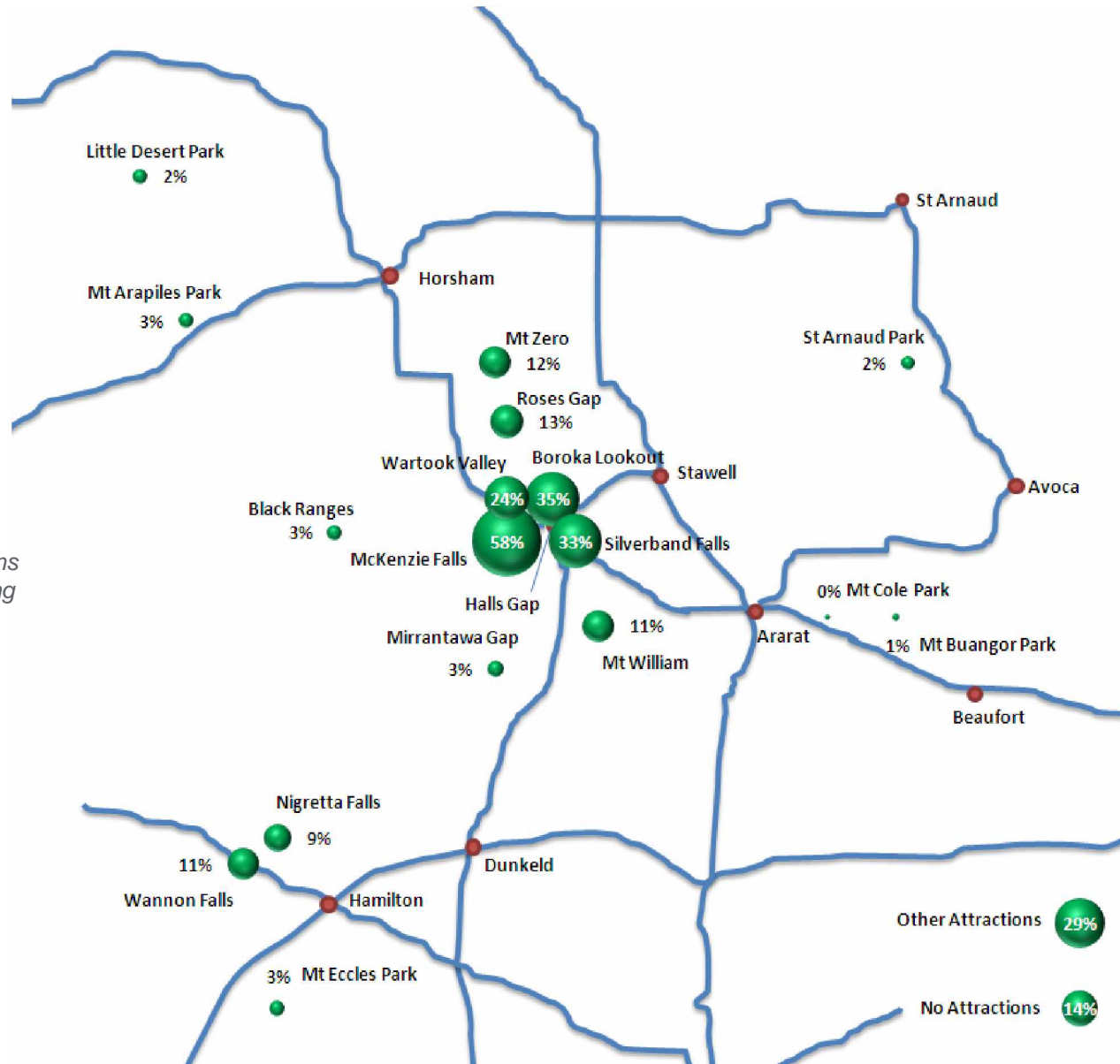
Bases:
 Halls Gap - 216;
 Western Towns - 57;
 Eastern Towns - 33;
 Day - 56

General sightseeing was the most popular activity for day visitors (57%)

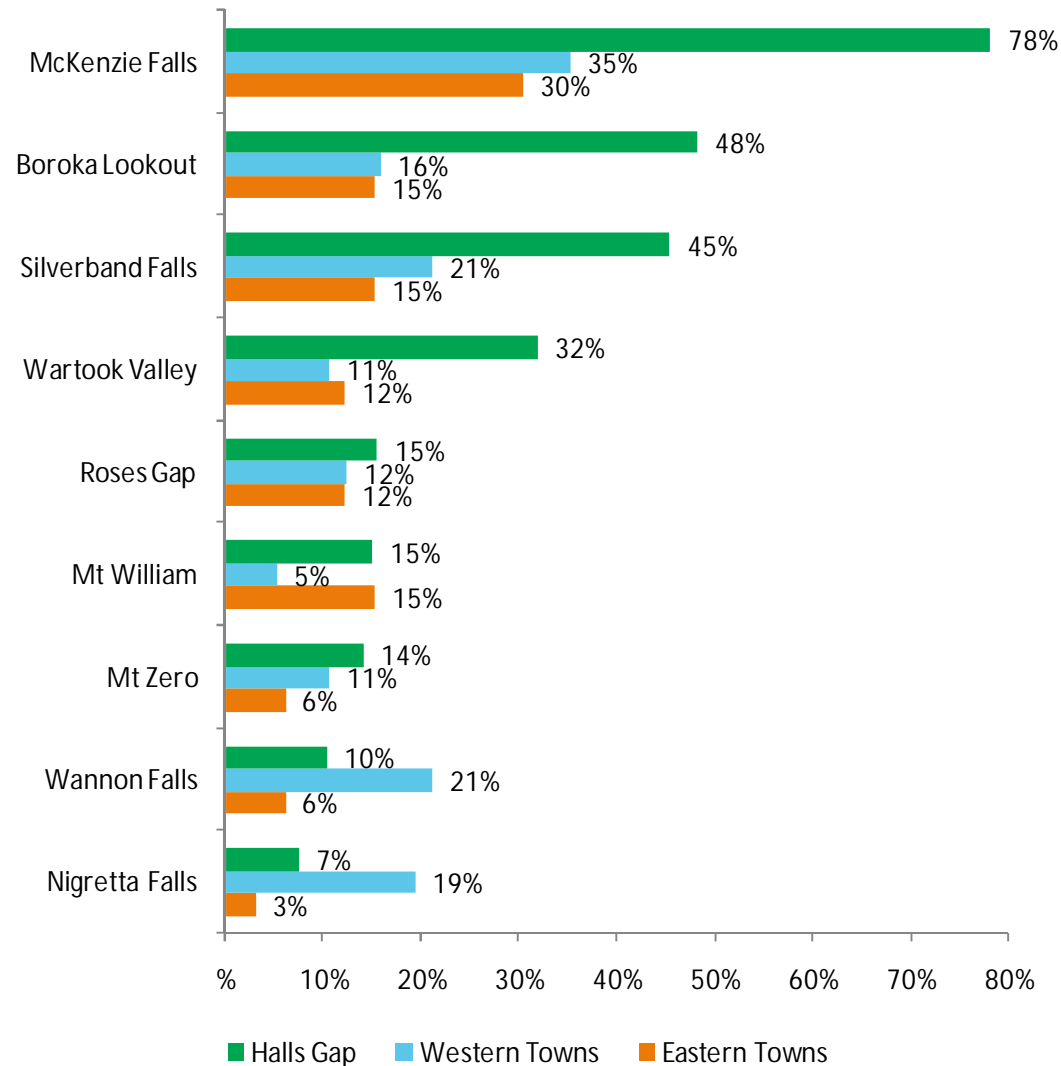
McKenzie Falls was the most popular attraction

“On this trip to the Grampians region, which of the following attractions did you visit?”

Base = 397



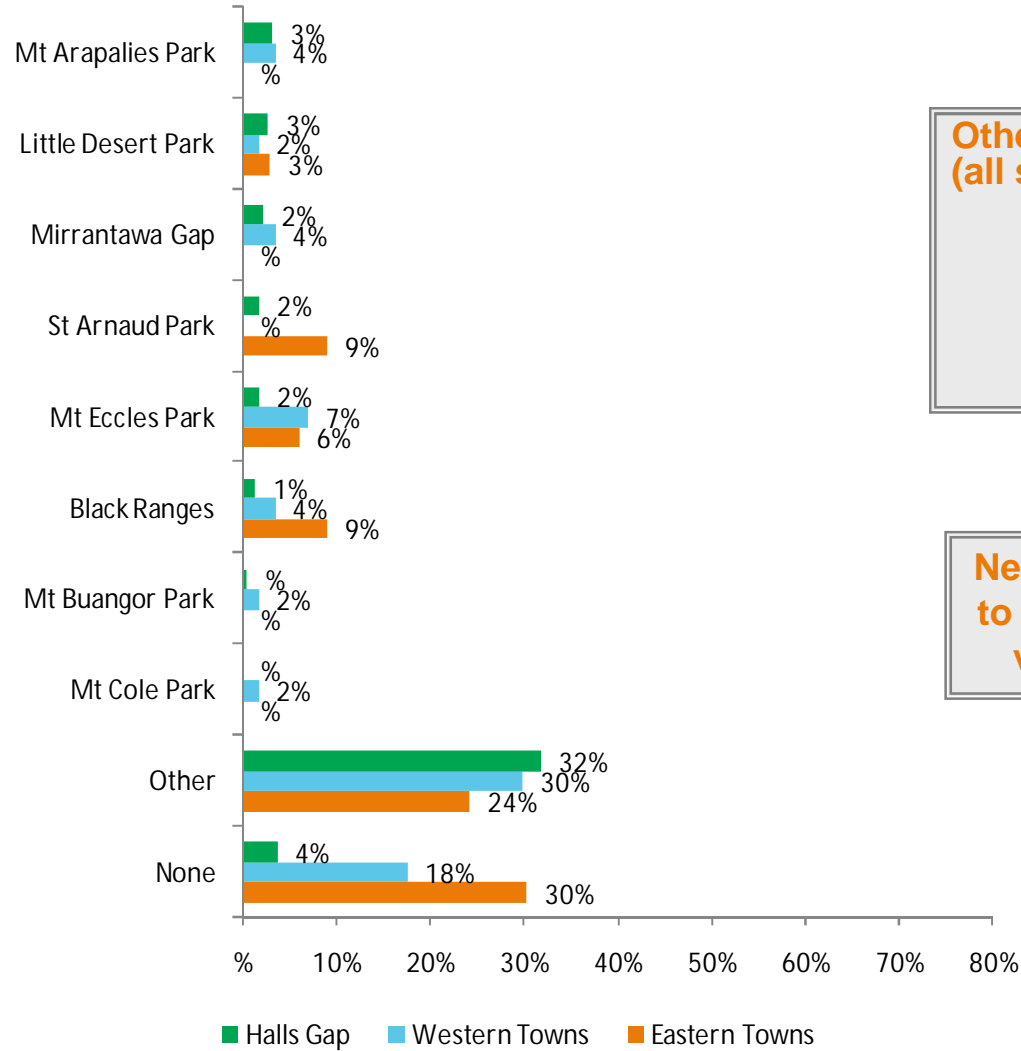
McKenzie Falls was the most popular attraction for all sub-regions



“On this trip to the Grampian region, which of the following attractions did you visit?”

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Other attractions included (all small %'s):
 Pinacles
 Venus Baths
 The Balconies
 Reid's Lookout

Nearly a third of visitors to Eastern Towns didn't visit any attractions

Bases:
 Halls Gap - 214;
 Western Towns - 57;
 Eastern Towns - 33;
 Day - 56

McKenzie Falls was the most popular attraction for day visitors (23%)

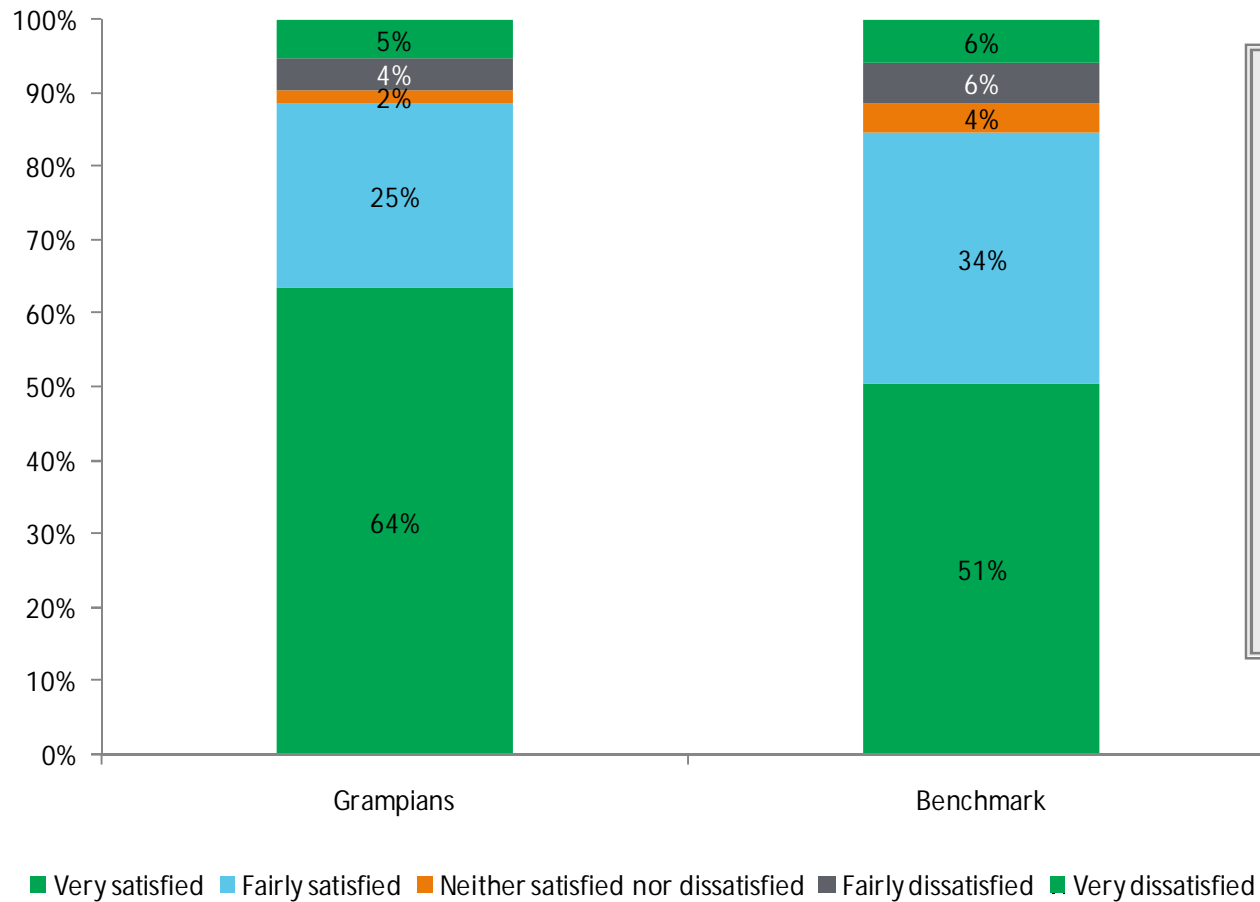
Summary – what did visitors do in the Grampians

- Ø Just walk or drive around/take in the sights/general sightseeing (82%) was the most common activity done in the Grampians and the proportion of people doing this exceeded the VPS benchmark of 74%
- Ø Other activities that exceeded VPS benchmark scores include Bushwalking/rainforest walks (62% v 30%), visit national/state parks (62% v 33%), picnics/BBQ (31% v 21%)
- Ø Eating out at a hotel/restaurant/club scored below the VPS benchmark (61% v 68%) as did shopping (44% v 55%)
- Ø Visiting wineries/cellar doors (36%) and going to markets (48%) were activities more commonly done in the Eastern Towns. There seems to be a synergy between these two activities.
- Ø McKenzie Falls, Boroka Lookout, Silverband Falls and Wartook Valley were the most commonly visited attractions.
- Ø Halls Gap visitors visited more attractions in total.

Visitor satisfaction

- Ø Importance and satisfaction
- Ø Were expectations met
- Ø Recommendation
- Ø Revisitation

Overall satisfaction scores are well above benchmarks

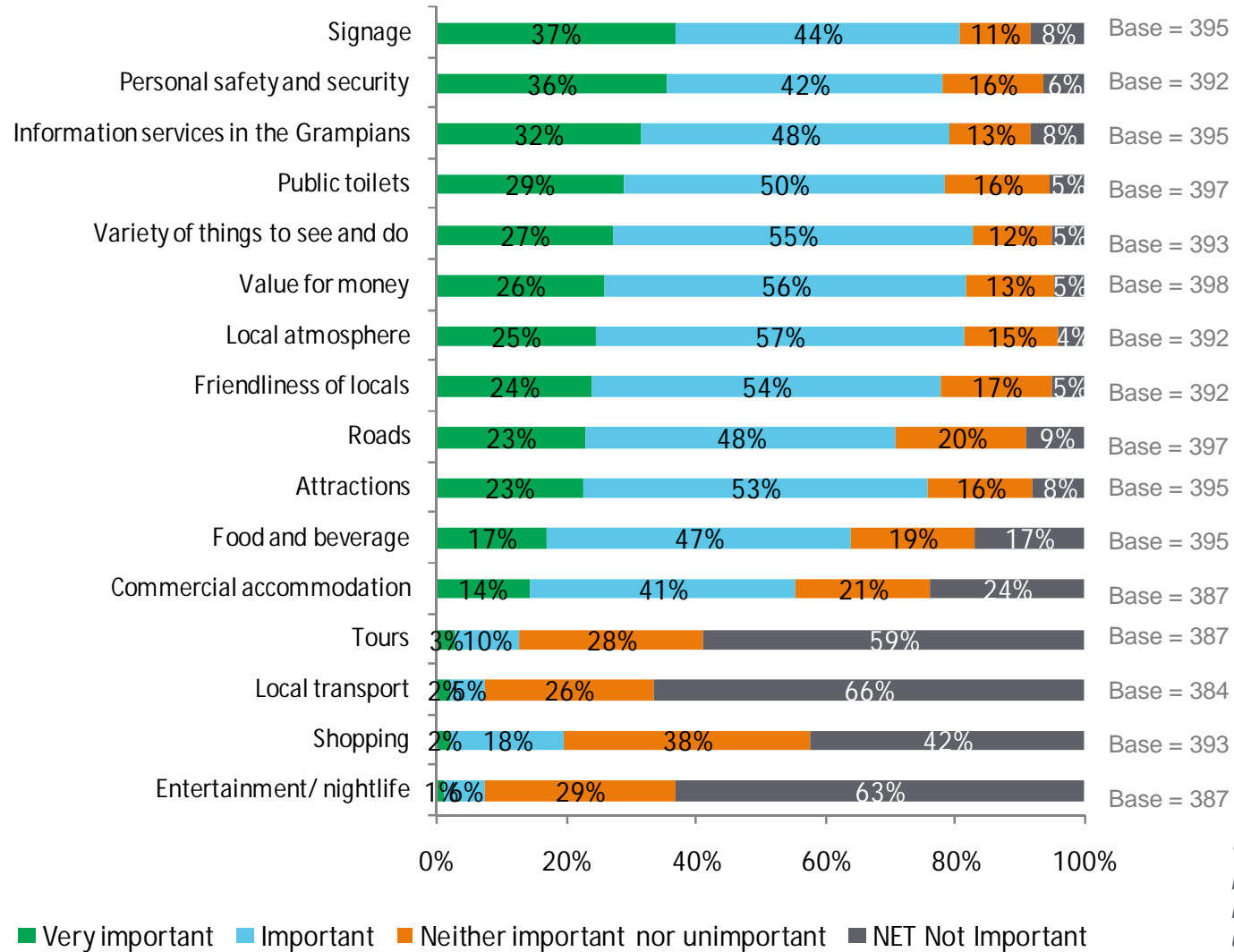


Overall satisfaction was highest in Halls Gap - 70% of visitors were very satisfied, almost 20% above the VPS benchmark. Outside Halls gap overall satisfaction was still above the VPS benchmark: Western Towns 61% and Eastern towns 55%.

Base = 404

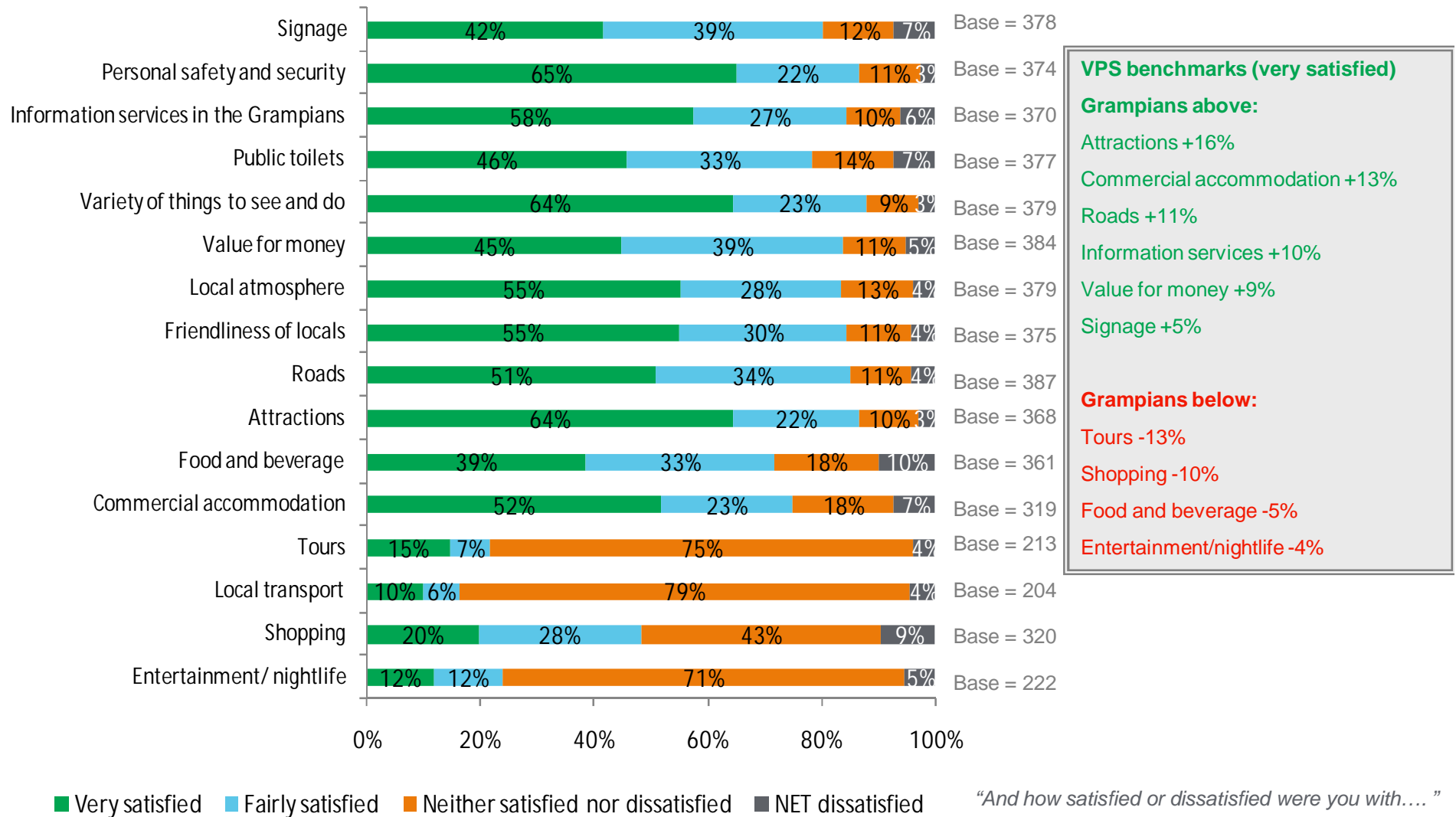
“Overall, how satisfied or dissatisfied were you with your experience at the Grampians region ?”

Importance of key attributes



“Again, thinking about your most recent trip to the Grampians region, how important or unimportant was ...”

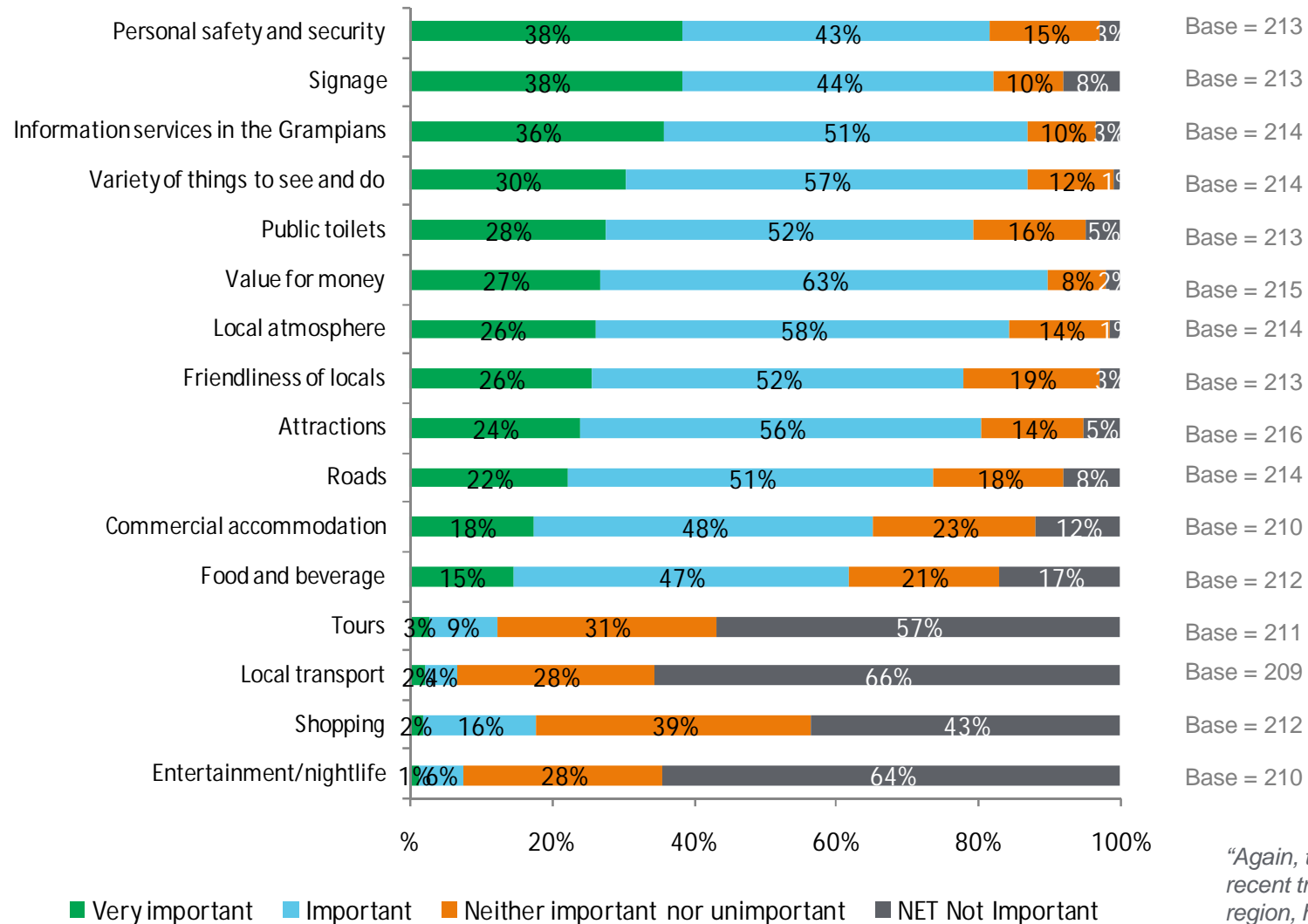
Visitors are satisfied with the attributes most important to visitors





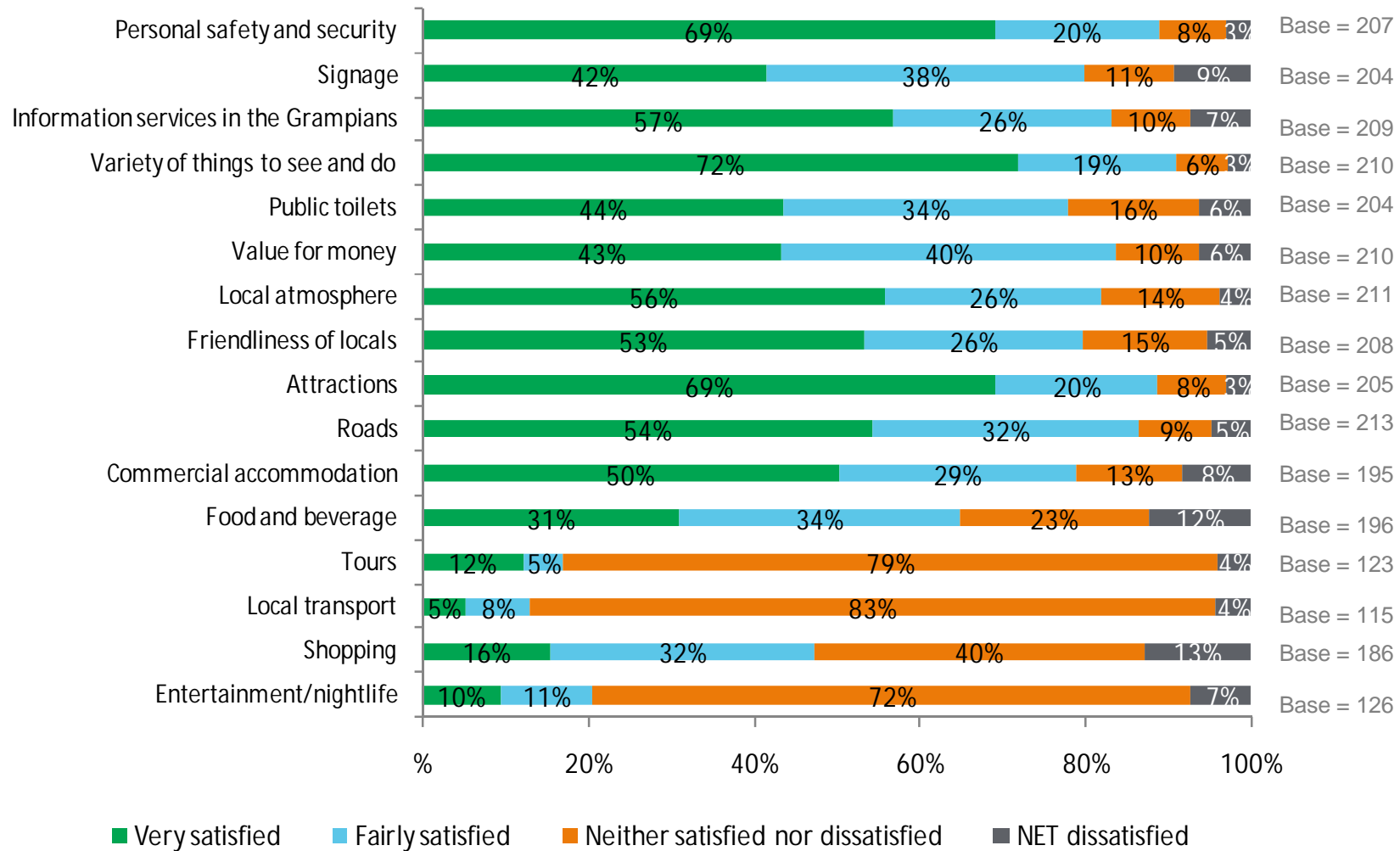
“Again, thinking about your most recent trip to the Grampians region, how important or unimportant was ...”
“And how satisfied or dissatisfied were you with....”

Importance of key attributes for Halls Gap

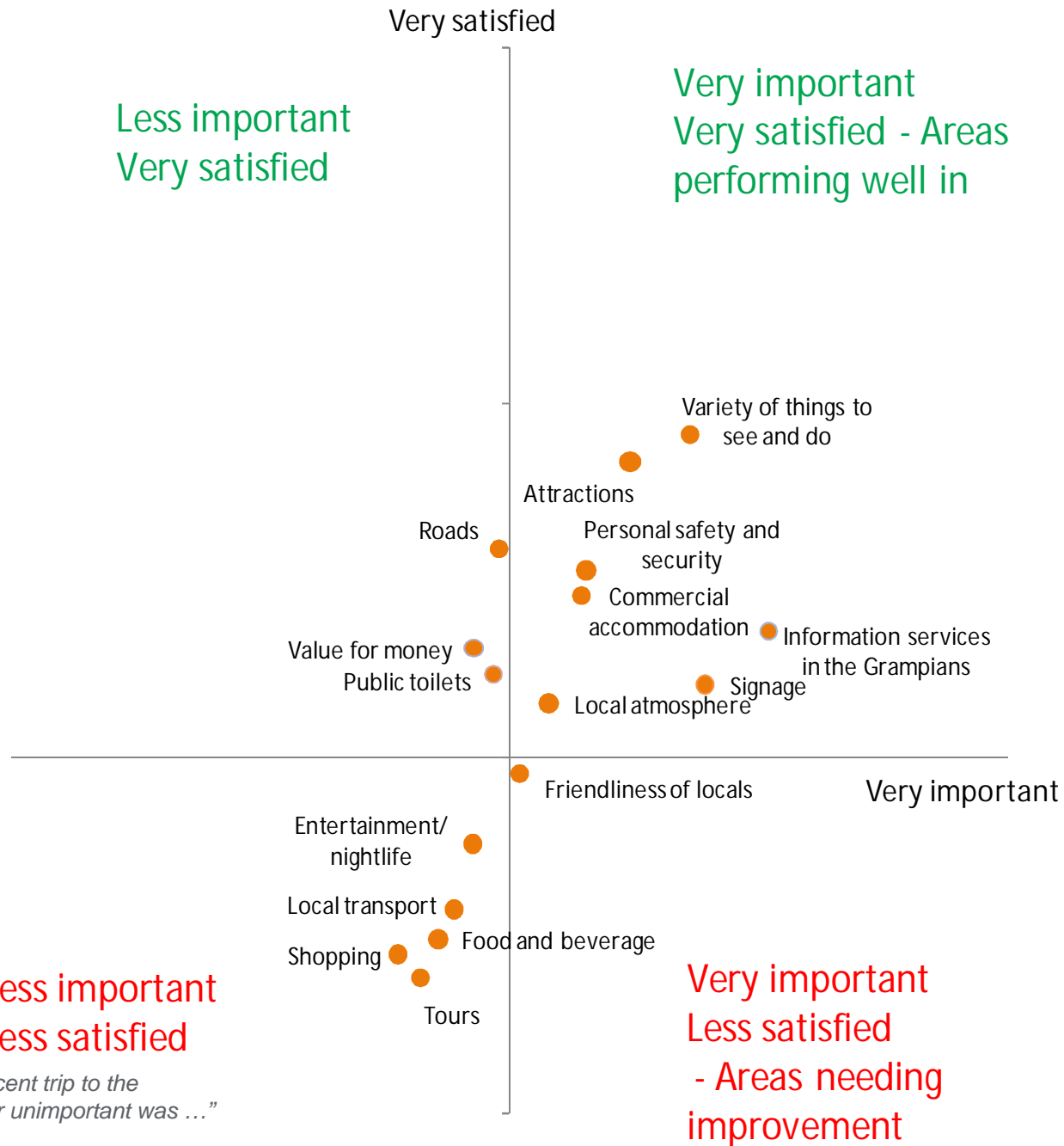


“Again, thinking about your most recent trip to the Grampians region, how important or unimportant was ...”

Satisfaction with key attributes for Halls Gap



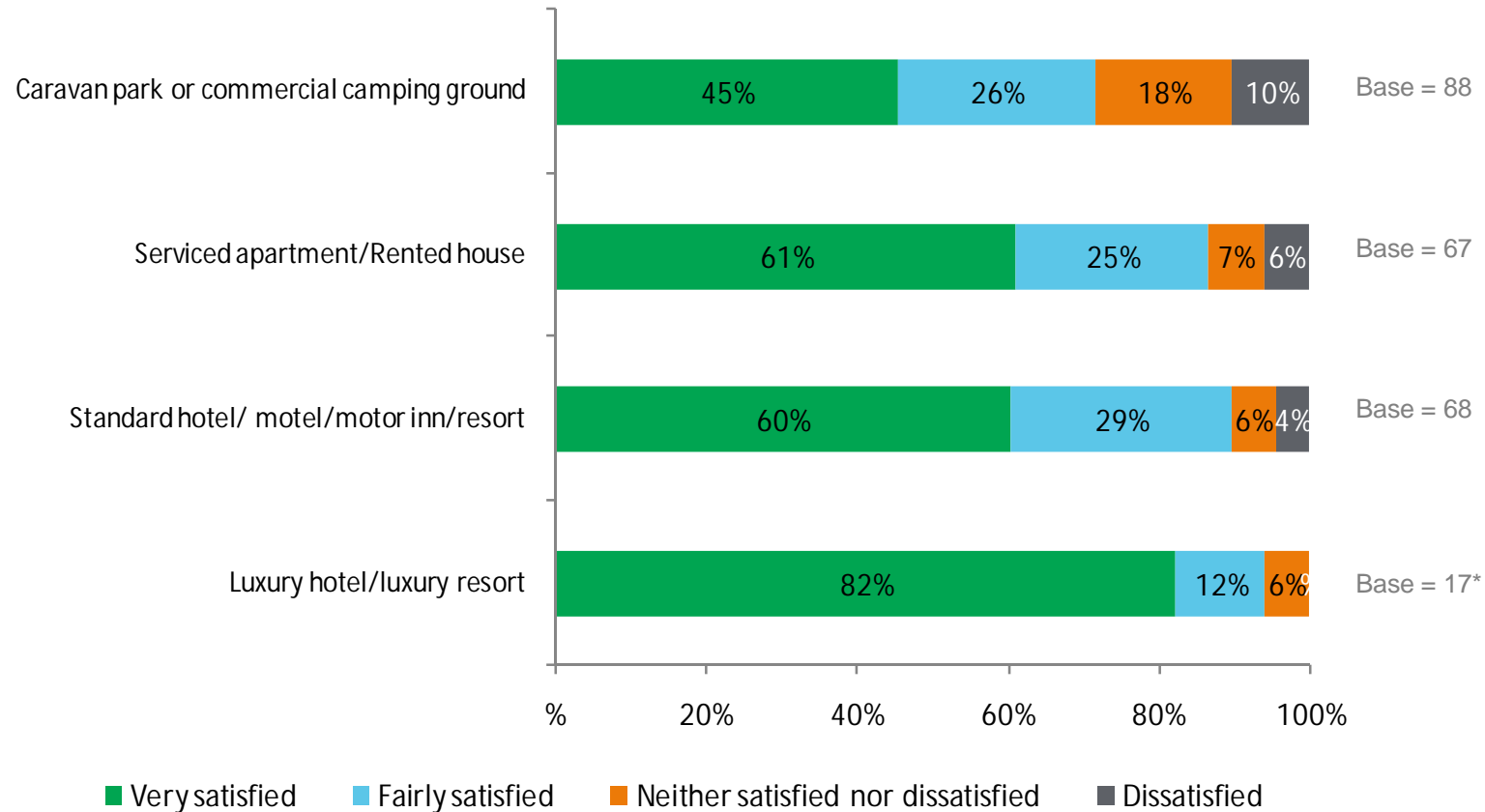
“And how satisfied or dissatisfied were you with....”



“Again, thinking about your most recent trip to the Grampians region, how important or unimportant was ...”

“And how satisfied or dissatisfied were you with...”

Caravan Parks seem to be where there are issues with accommodation – verbatim responses indicate that this result may be driven by one or two parks



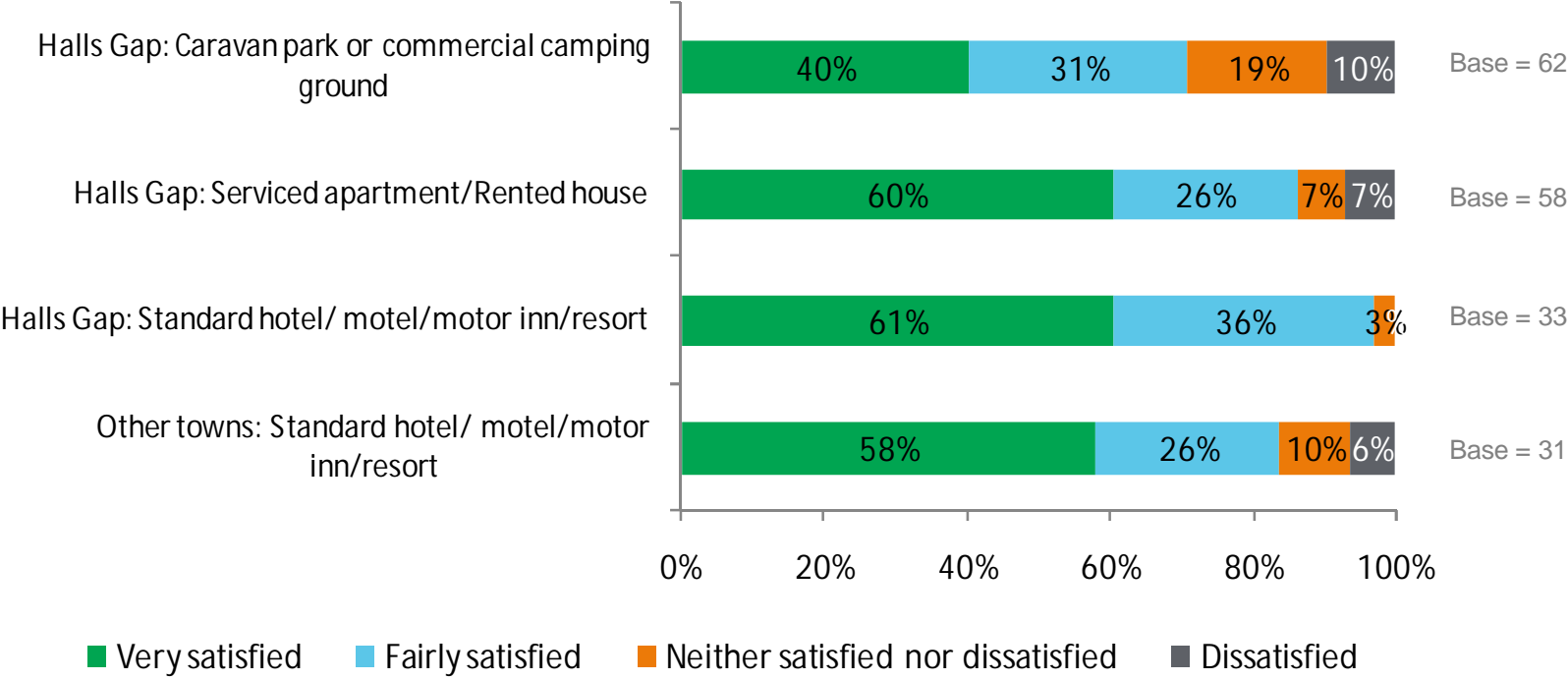
The VPS benchmark for very satisfied with caravan parks or commercial camping grounds is 43%

* Small base

“What type of accommodation did you mainly use in the Grampians region?”

“And how satisfied or dissatisfied were you with...”

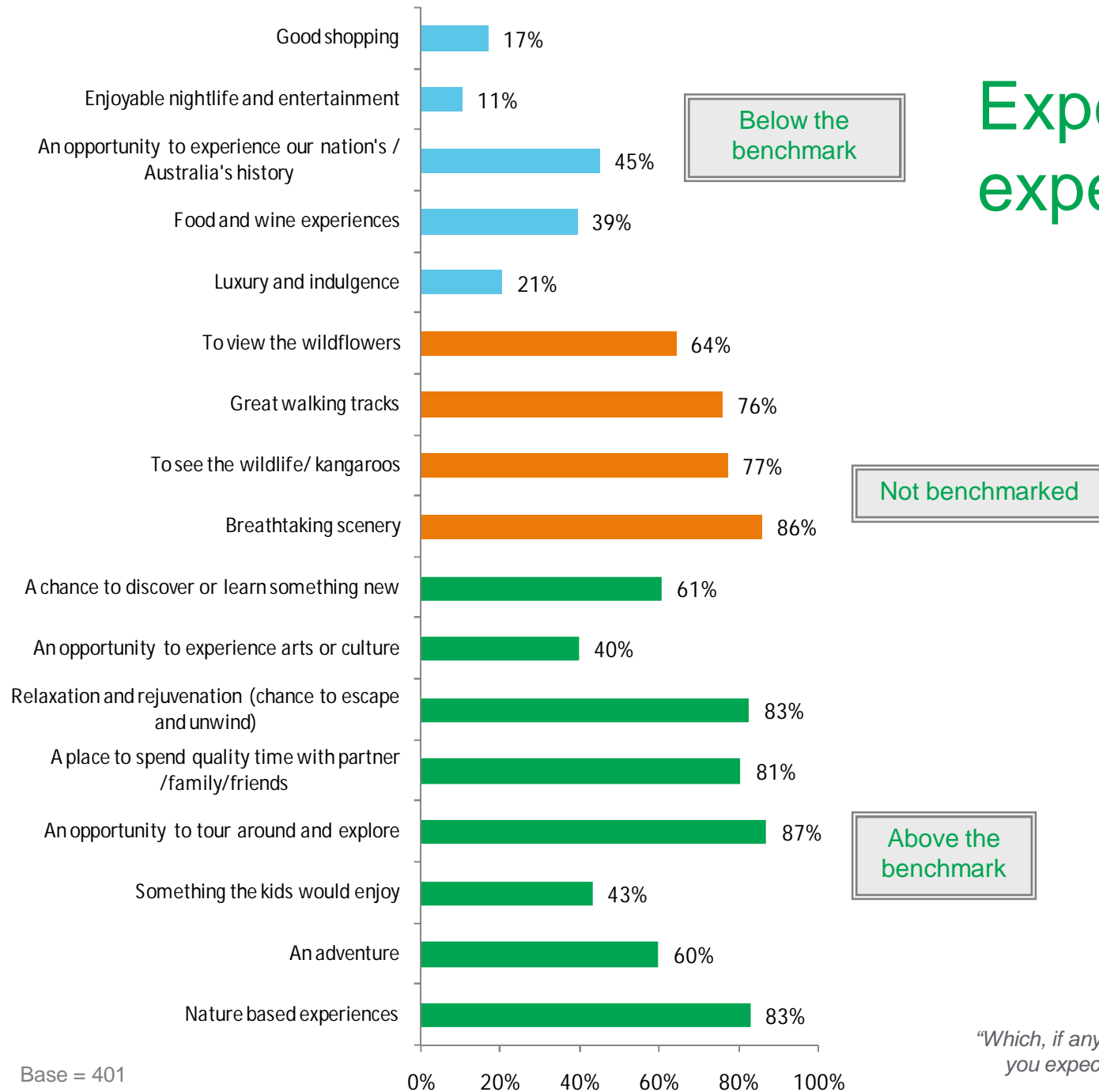
Halls Gap visitors reported considerably lower satisfaction with caravan parks compared to other accommodation types



In Halls Gap the proportion of visitors very satisfied with caravan parks or commercial camping grounds drops below the VPS benchmark of 43%

*“What type of accommodation did you mainly use in the Grampians region?”
 “And how satisfied or dissatisfied were you with...”*

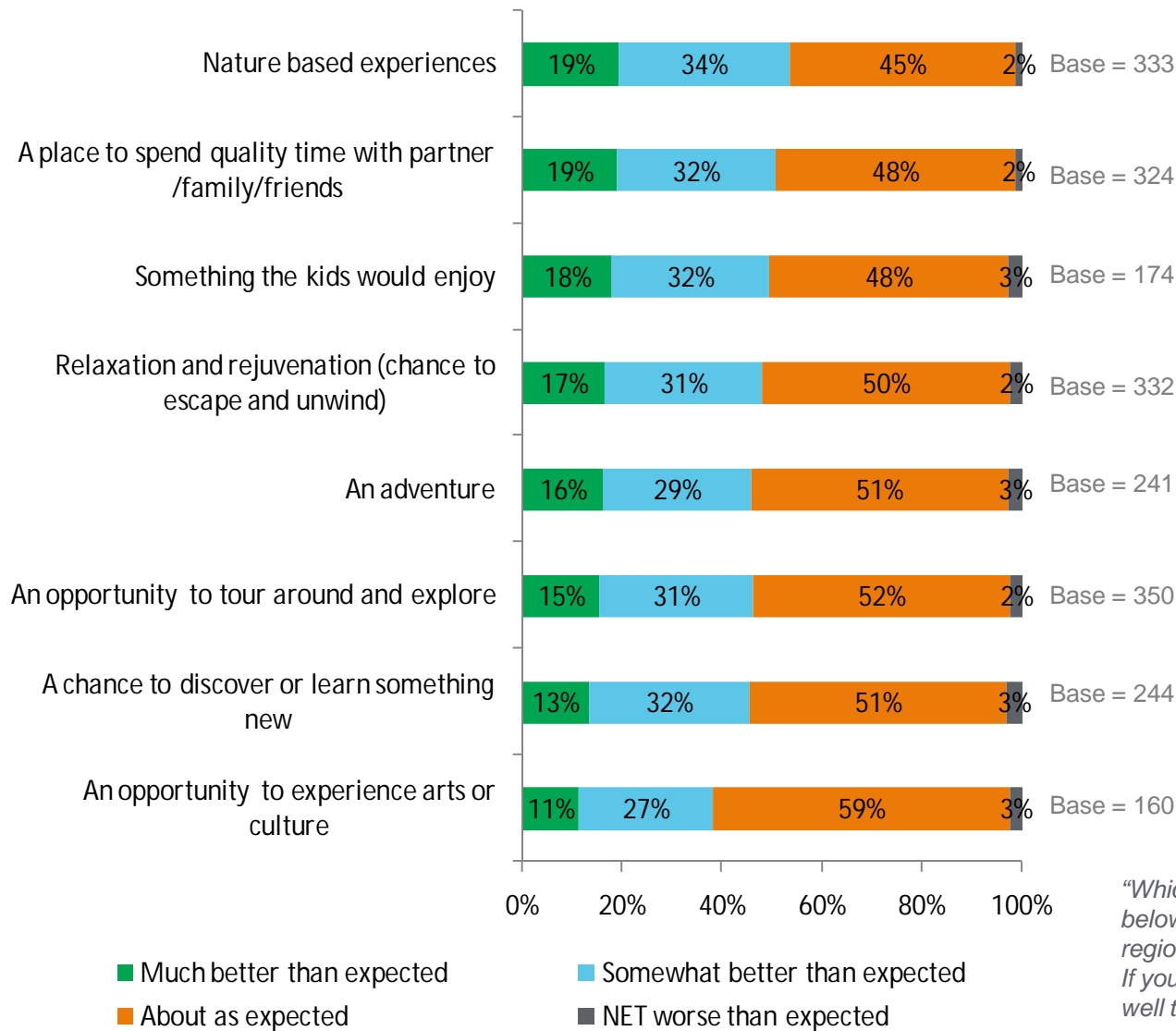
Expectations of experiences



Base = 401

"Which, if any, of the experiences listed below did you expect the Grampians region to offer?"

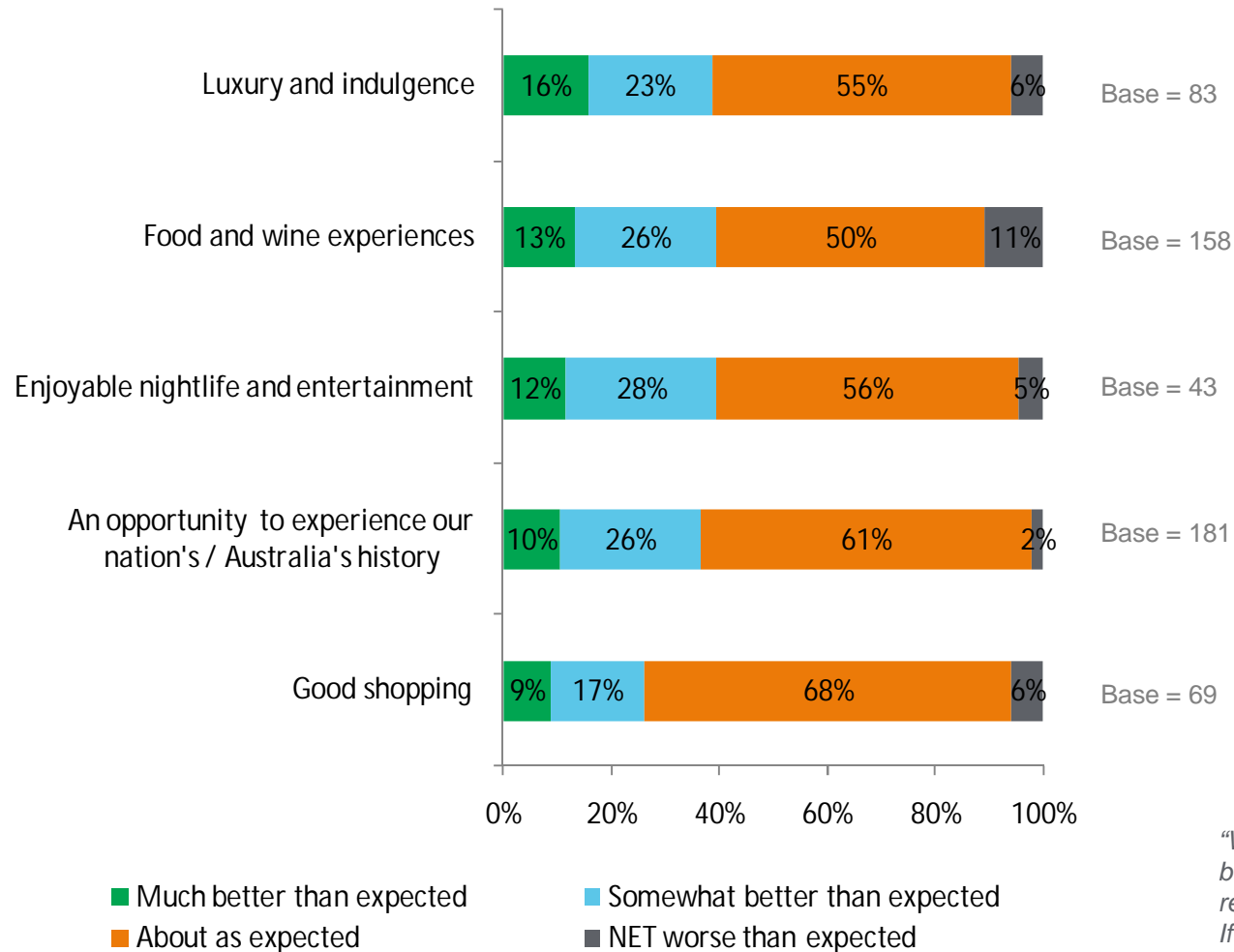
Ratings for experiences (expectations above the VPS benchmark)



Nature based experiences is the only experience that scored above the VPS benchmarks for Total Better Than Expected (+5%)

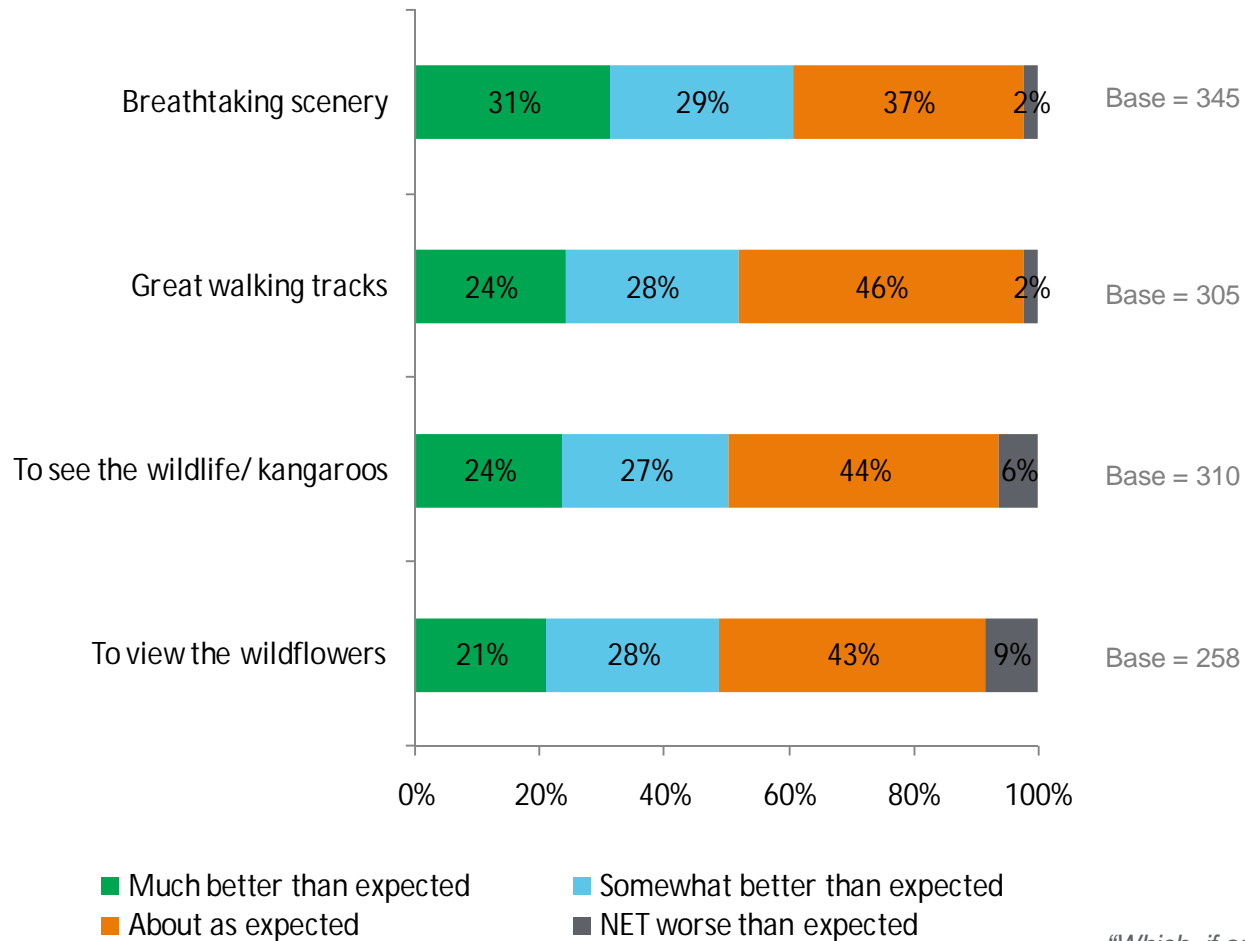
*“Which, if any, of the experiences listed below did you expect the Grampians region to offer?
If you answer YES, please indicate how well the region met this expectation.”*

Ratings for experiences (expectations below the VPS benchmark)



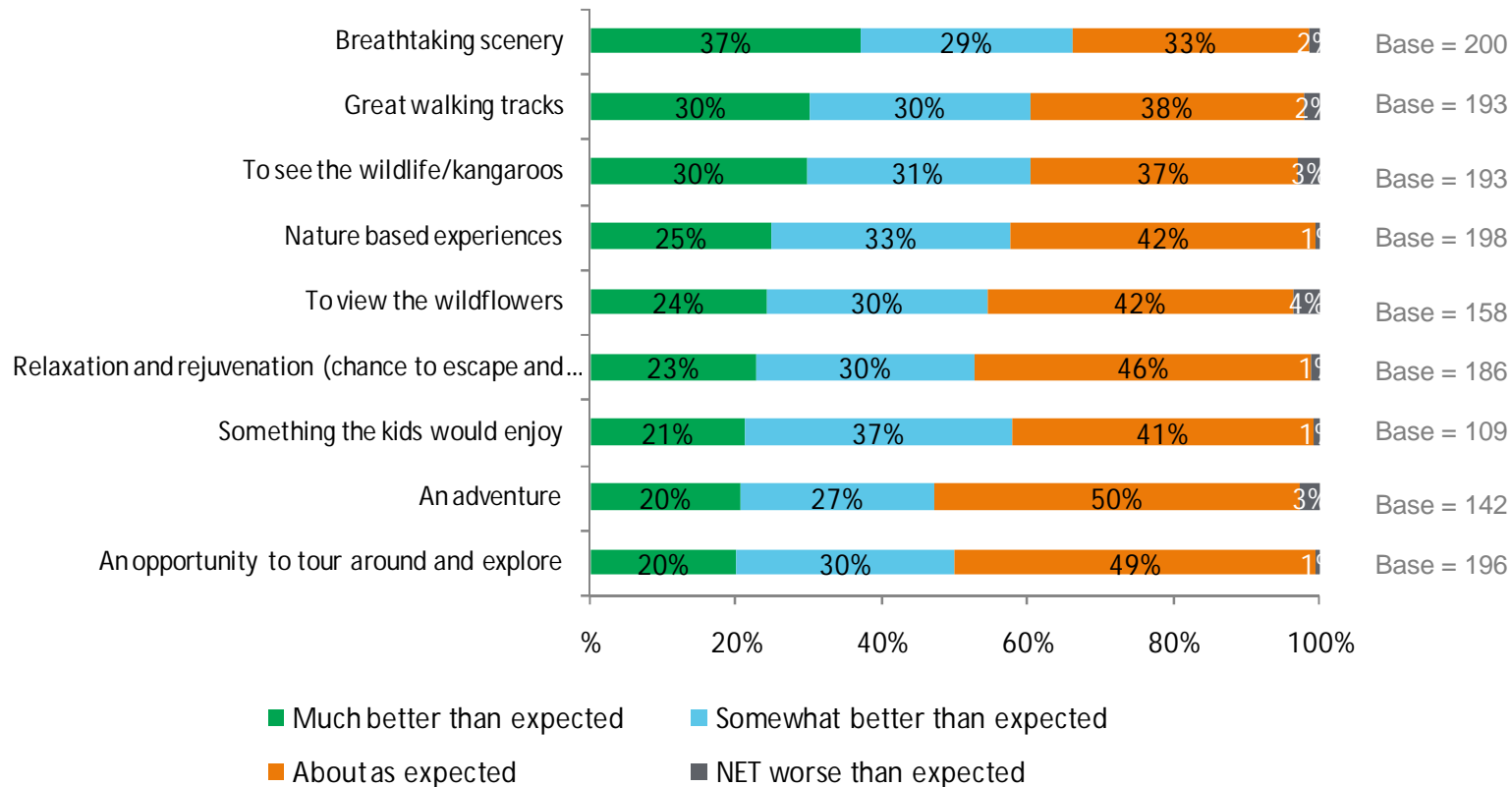
*"Which, if any, of the experiences listed below did you expect the Grampians region to offer?
If you answer YES, please indicate how well the region met this expectation."*

Ratings for other experiences (not benchmarked)



*"Which, if any, of the experiences listed below did you expect the Grampians region to offer?
If you answer YES, please indicate how well the region met this expectation."*

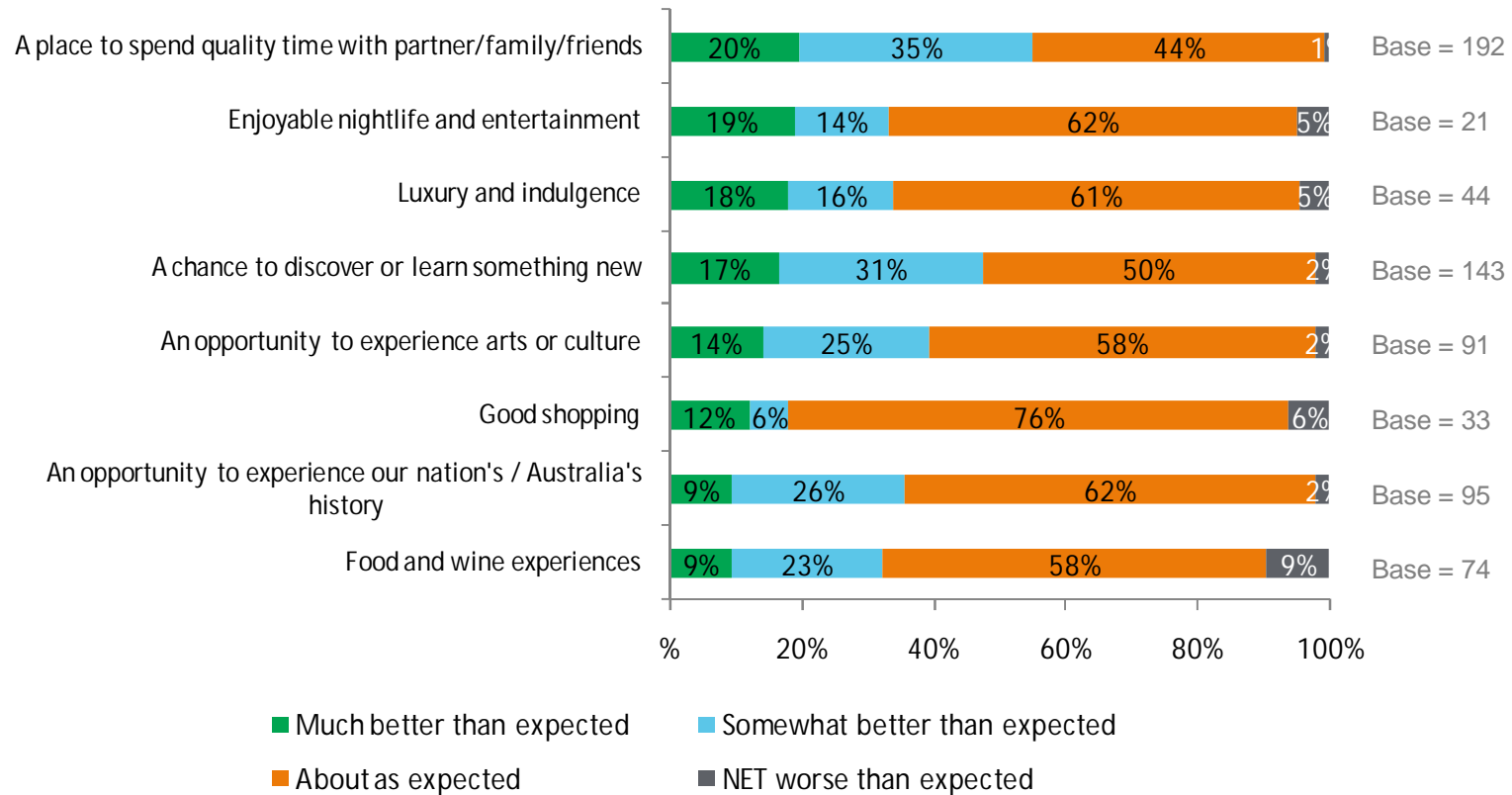
Ratings of expectations from Halls Gap visitors were generally higher than for the region as a whole



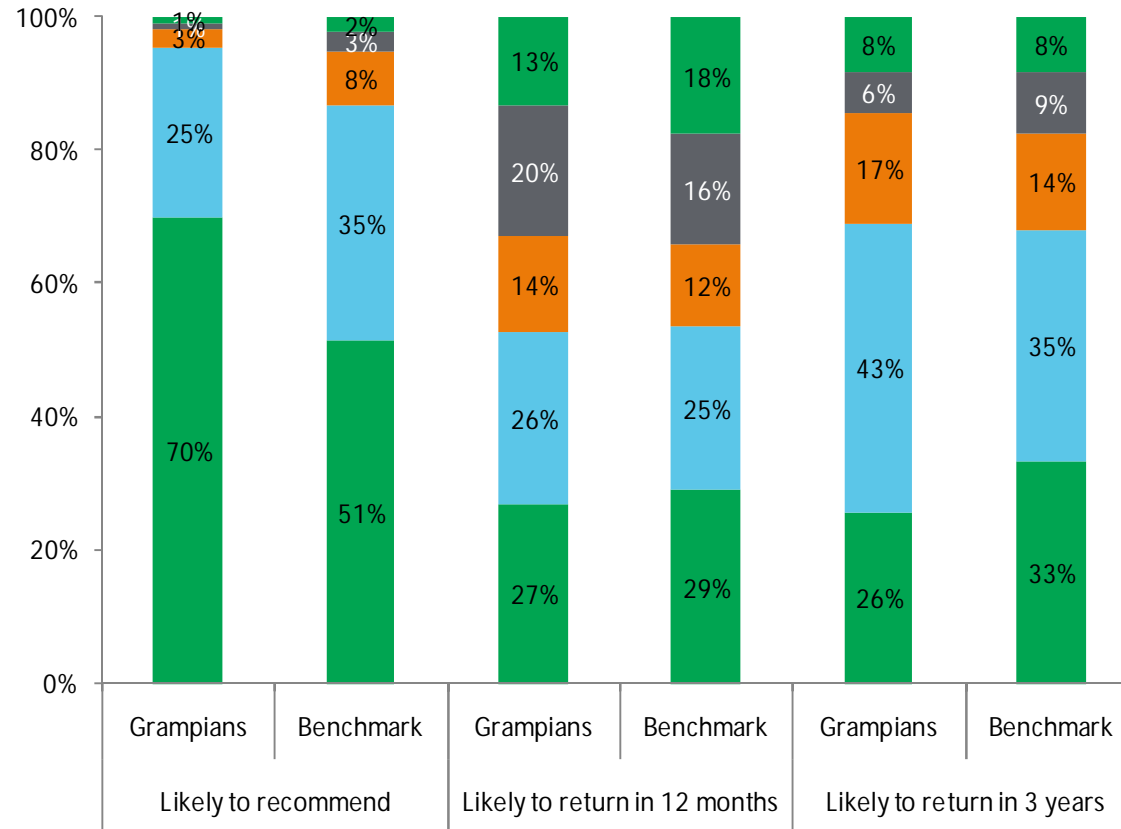
“Which, if any, of the experiences listed below did you expect the Grampians region to offer? If you answer YES, please indicate how well the region met this expectation.”

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Recommendation scores are well above benchmarks



■ Very likely
 ■ Fairly likely
 ■ Neither likely nor unlikely
 ■ Fairly unlikely
 ■ Very unlikely

Likely to recommend;
 Likely to return in 12 months -
 Base = 404

Likely to return in 3 years
 Base = 294

“How likely are you to recommend the Grampians region to other people as a destination to visit?”
“How likely are you to return to the Grampians region in the next 12 months/next 3 years?”

What are visitors most happy with (open ended responses)



Base = 279

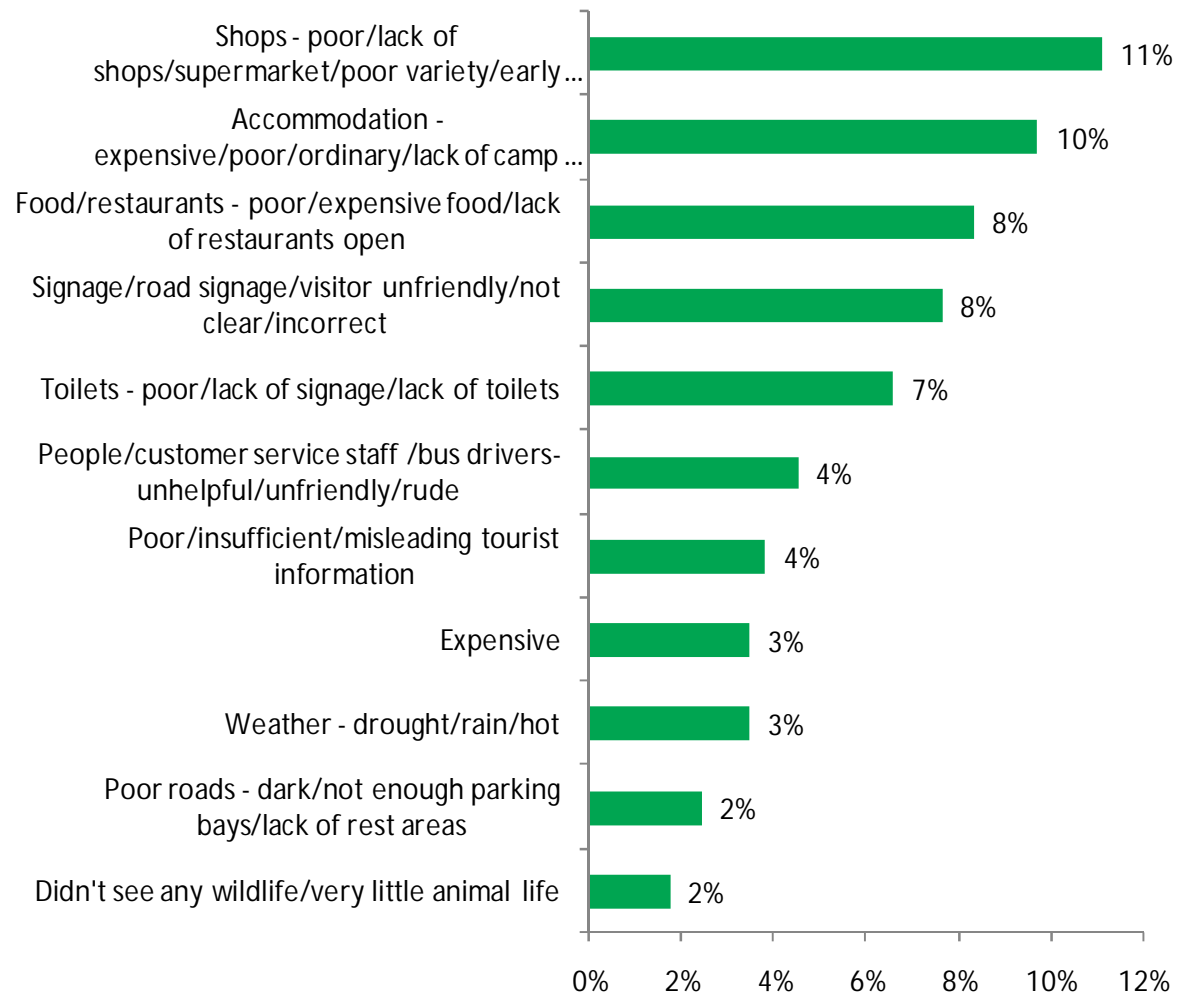
"What else about the Grampians region were you particularly happy about on your recent visit?"

What are visitors most happy with

(examples of open ended responses)

- *It is such a beautiful peaceful place to take your family, with wonderful scenery in relaxed atmosphere. We are very lucky to have this beauty to visit and explore.*
- *The scenery was amazing, great to have access to such beauty. We loved the Grampians rawness and unspoilt nature although Halls Gap is obviously a bustling tourist spot, the areas around in the national park have not been spoilt by humans.*
- *The easy access to wildlife, indeed the abundance of the wildlife. Natural environment is excellent.*
- *I was just blown away with the rugged beauty of the area and the amount of birdlife and animal life that didn't have any fear of humans.*
- *The Avoca motel went out of their way to help us....in fact we enjoyed all the wineries and Avoca market.*
- *The caravan park at Hamilton was very well set up and maintained, a pleasure to find in a country town.*
- *The spiritual feeling of the area is like your Grandmother giving you a big hug!*

What are visitors most unhappy with (open ended responses)



Base = 289

"What else about the Grampians region were you particularly unhappy about on your recent visit?"

What are visitors most unhappy with (examples of open ended responses)

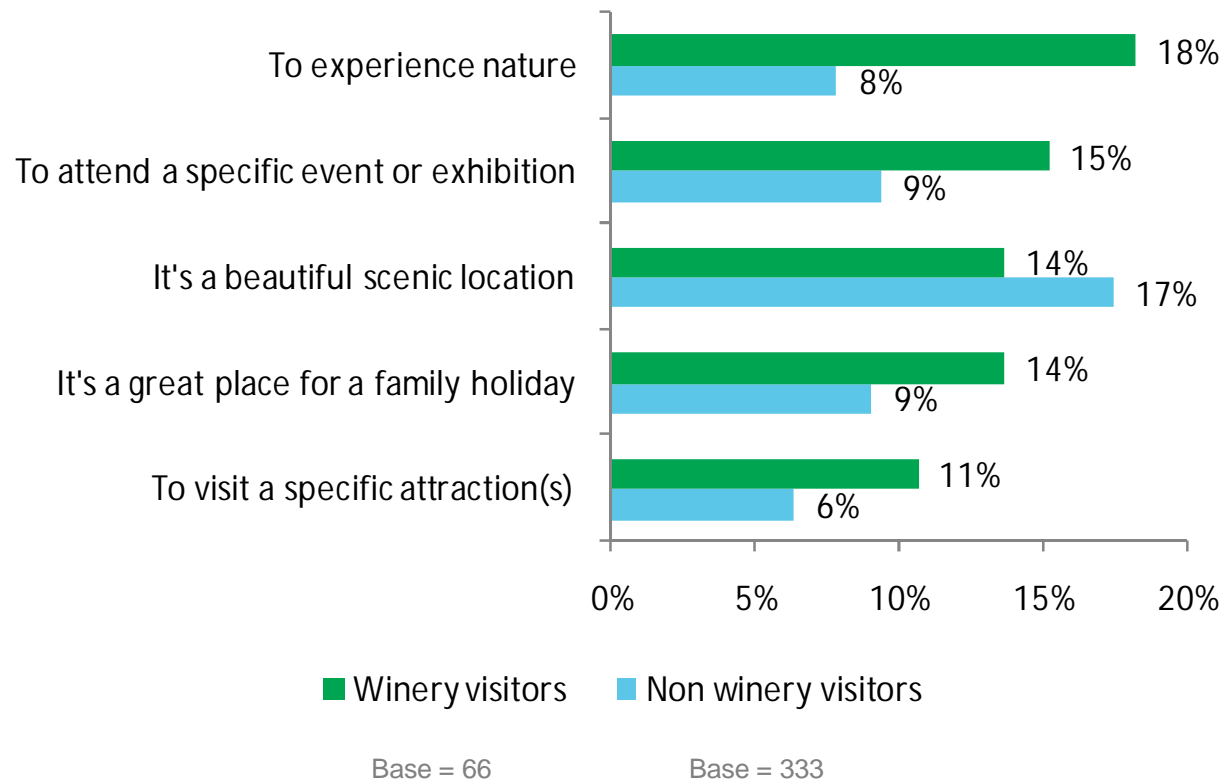
- *Cost of groceries in Halls Gap supermarket*
- *It was all good except for the extortionate rip off prices of the supermarket at Halls Gap...fortunately we came prepared.*
- *The general store prices were disgusting, as was the service. Would drive into Stawell again for supplies as we did a couple of times this trip.*
- *Caravan Park in town needs a good upgrade, happy to charge top rates, but not delivering on product.*
- *Toilet and shower facilities, and camp kitchen of very poor quality – needs upgrading.*
- *Caravan park cabins were not 'deluxe' as sold to us...*
- *Very limited gourmet opportunities, given the build up to the contrary.*
- *Lack of choice for good takeaway food, and apart from hotel, nowhere else to eat at a reasonable price.*
- *The meals at the cafes and restaurants were not that good.*

Summary – visitor satisfaction

- Ø Overall satisfaction with the Grampians was well above the VPS benchmark score. 64% of visitors were very satisfied compared to the benchmark of 50%.
- Ø Halls Gap visitors recorded the highest satisfaction with 70% of visitors very satisfied.
- Ø Both the Western and Eastern towns were also above the VPS benchmark in terms of overall satisfaction (61% and 55% respectively).
- Ø The Grampians was rated above the VPS benchmark on a number of other attributes:
 - ✓ Attractions (64% v 48%)
 - ✓ Commercial accommodation (52% v 41%)
 - ✓ Roads (51% v 40%)
 - ✓ Information services (58% v 48%)
 - ✓ Value for money (45% v 36%)
 - ✓ Signage (42% v 37%)
- Ø Satisfaction with caravan parks (45% very satisfied) was lower than for other accommodation types (61% serviced apartment/rented house, 60% standard hotel/motel/motor inn/resort).
- Ø Satisfaction with caravan parks in Halls Gap is lower than for the whole region (40% very satisfied).
- Ø In terms of experiences no matter which way it is expressed, experiencing nature (the beauty, the flora and the fauna) is the key strength of the area and Halls Gap is the strength in terms of delivering those experiences – Halls Gap is more likely than the region as a whole to exceed expectations of nature based experiences.

Winery/cellar door visitor segment

Top 5 single main reason for visiting the Grampians for winery visitors



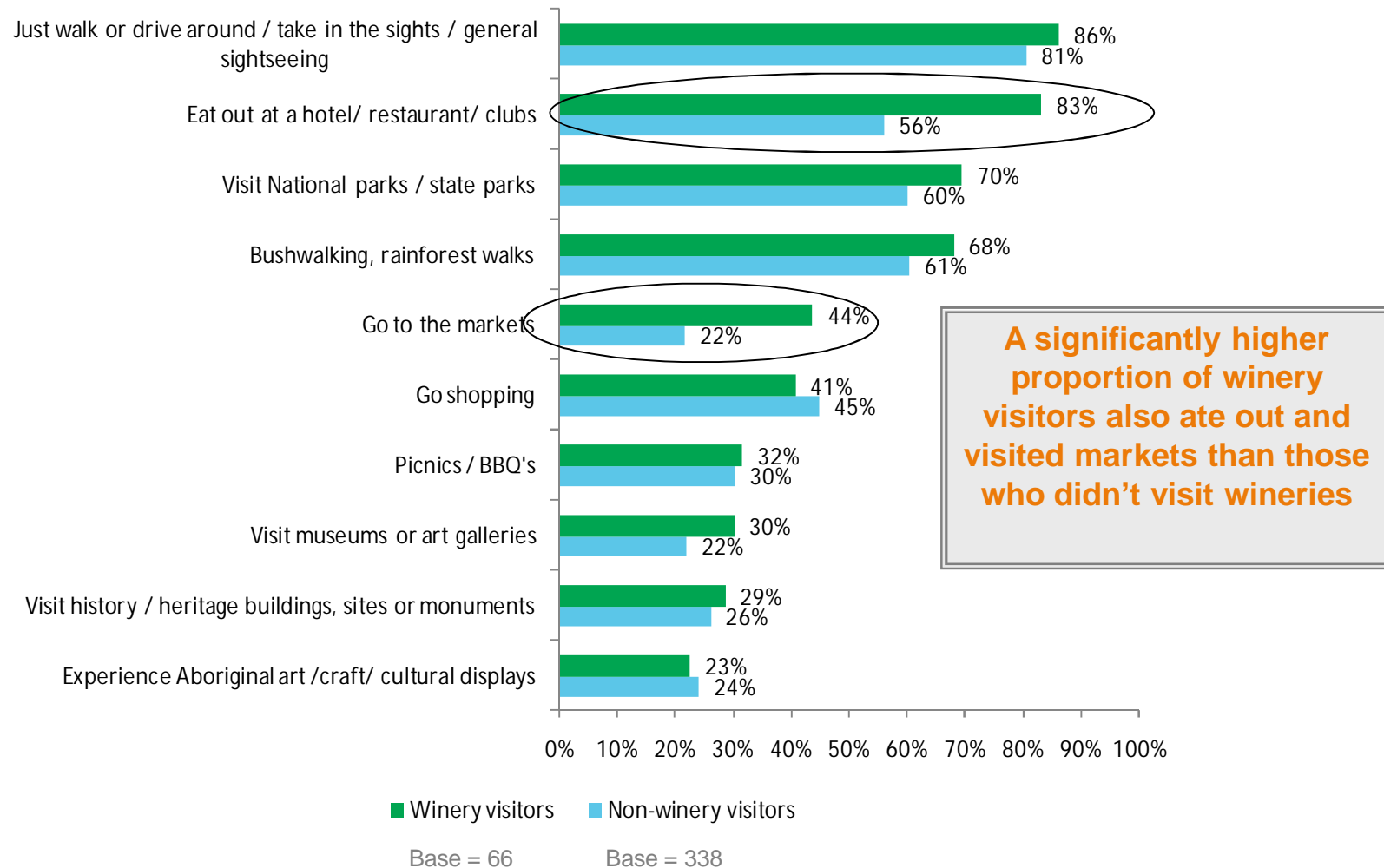
“On this trip to the Grampians region, which of the following activities did you undertake?”

Winery visitors: Visitors who visited a winery/cellar door

Non-winery visitors: Visitors who did not visit a winery/cellar door

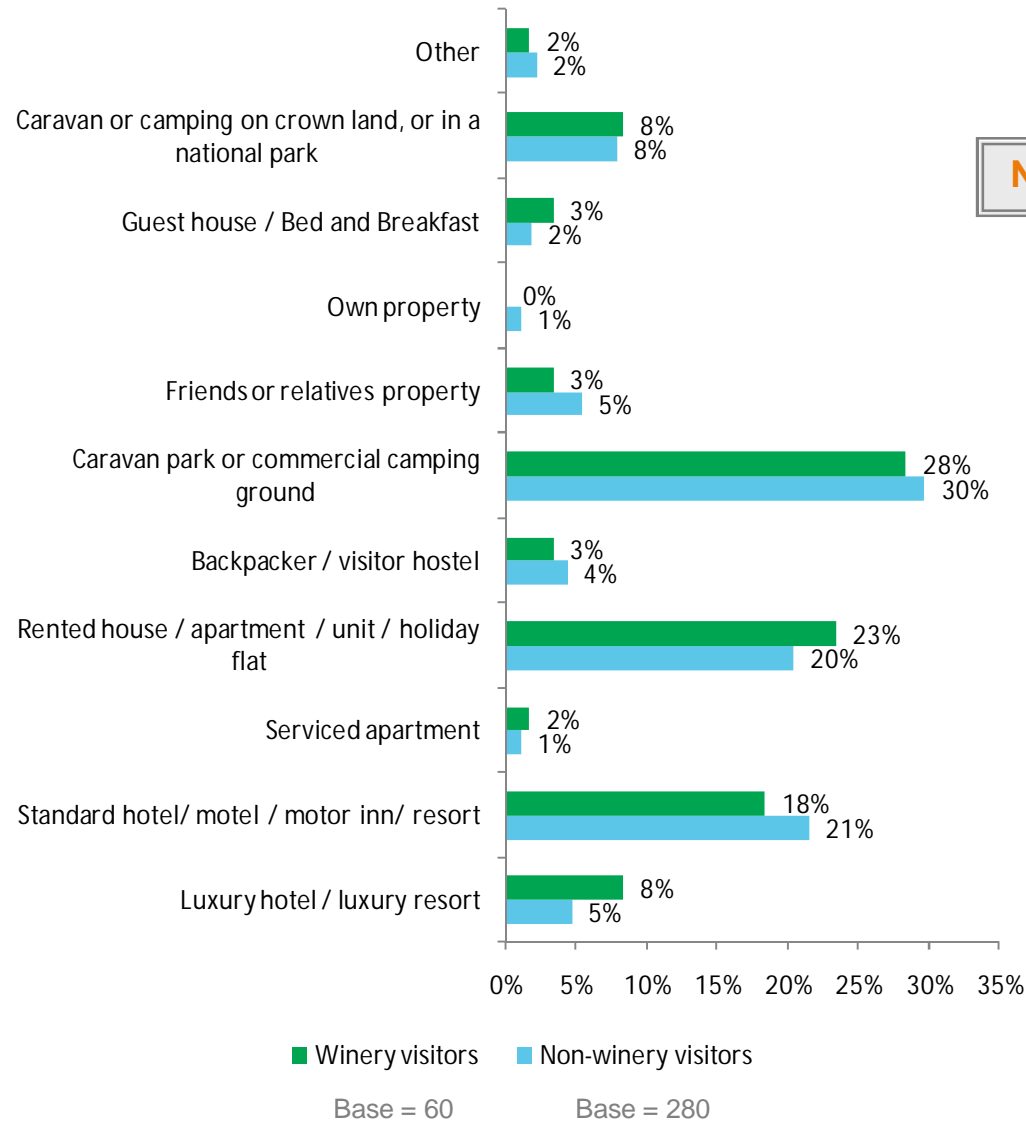
“Which of the following was the most important in choosing the Grampians region?”

Top 10 activities of visitors to wineries/cellar doors



"On this trip to the Grampians region, which of the following activities did you undertake?"

Visitors to wineries stayed in similar accommodation to other visitors

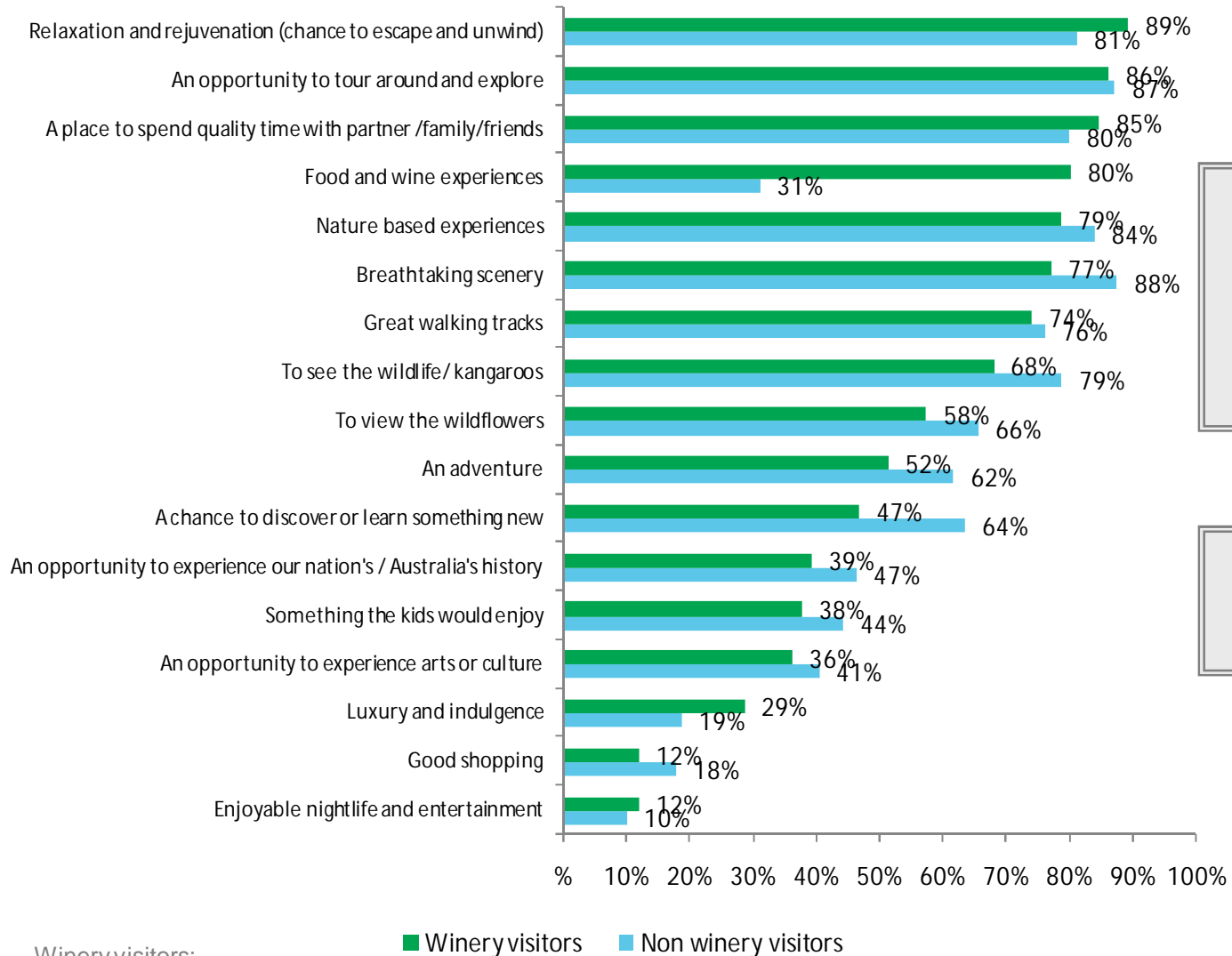


No significant differences

“On this trip to the Grampians region, which of the following activities did you undertake?”

“What type of accommodation did you mainly use in the Grampians region?”

Expectations of the winery visitors



Winery visitors:
 Base = 66
 Non-winery visitors:
 Base = 333

In addition to a food and wine experience, winery visitors commonly expected luxury and relaxation with partners/family/friends

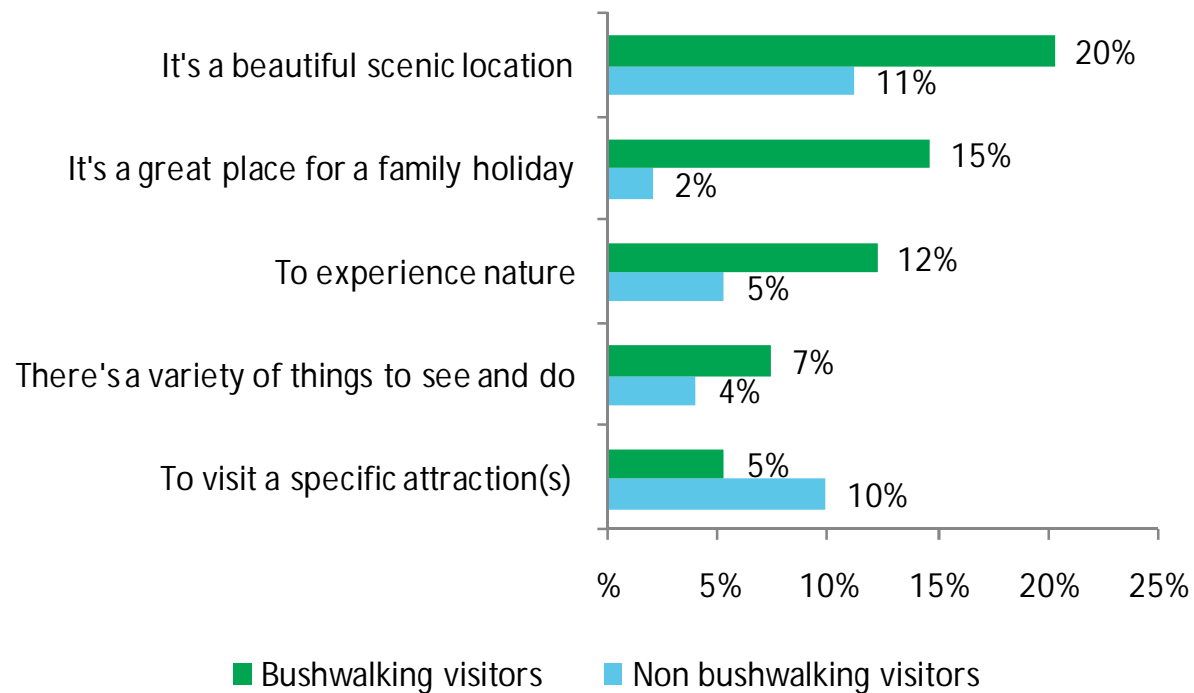
Winery visitors were less likely to expect nature type experiences

“On this trip to the Grampians region, which of the following activities did you undertake?”

“Which, if any, of the experiences listed below did you expect the Grampians region to offer?”

Bushwalking visitor segment

Top 5 single main reason for visiting the Grampians for bushwalking visitors



Base = 247

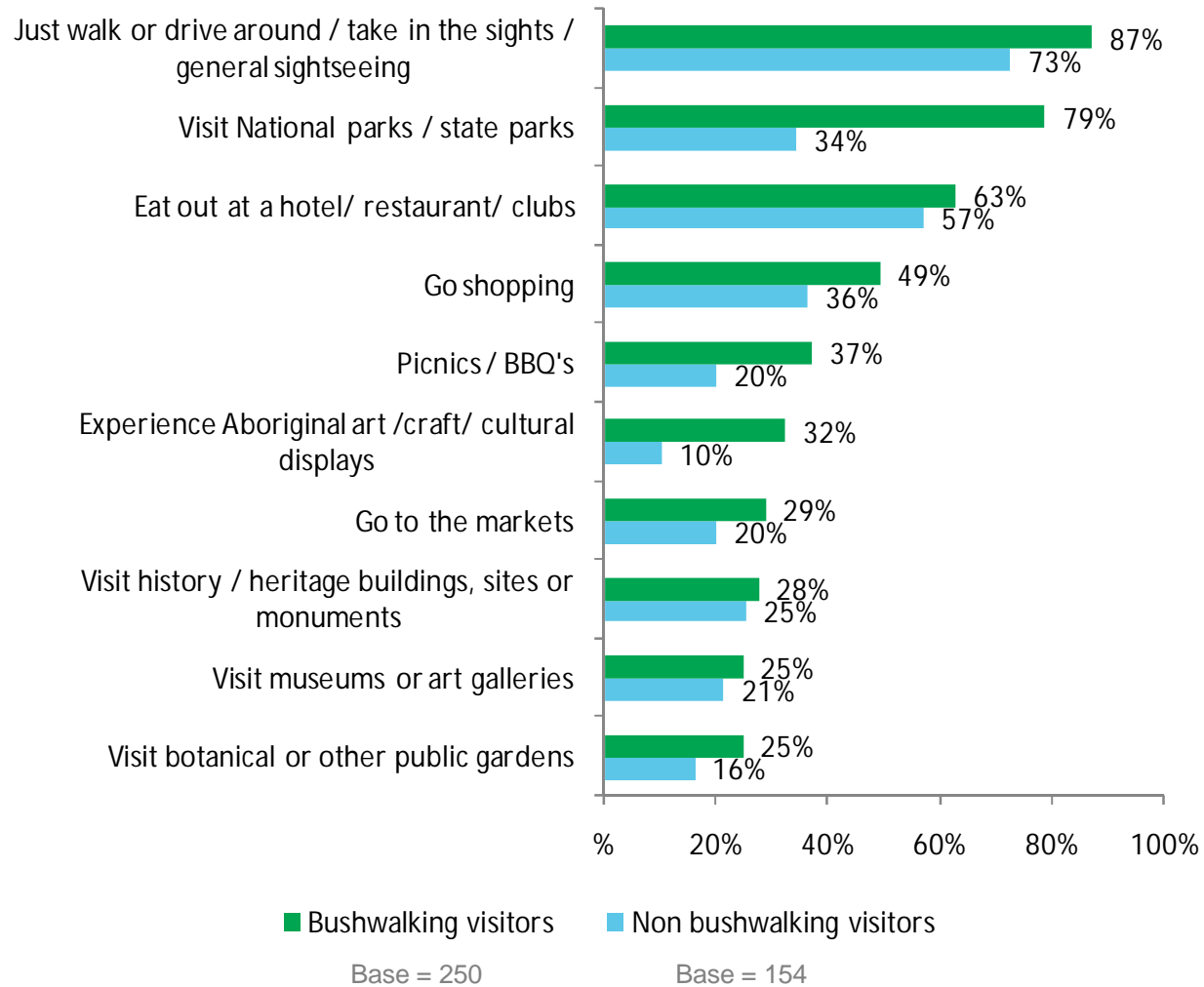
Base = 152

Bushwalking visitors: Visitors who went Bushwalking
Non-bushwalking visitors: Visitors who did not go Bushwalking

"On this trip to the Grampians region, which of the following activities did you undertake?"

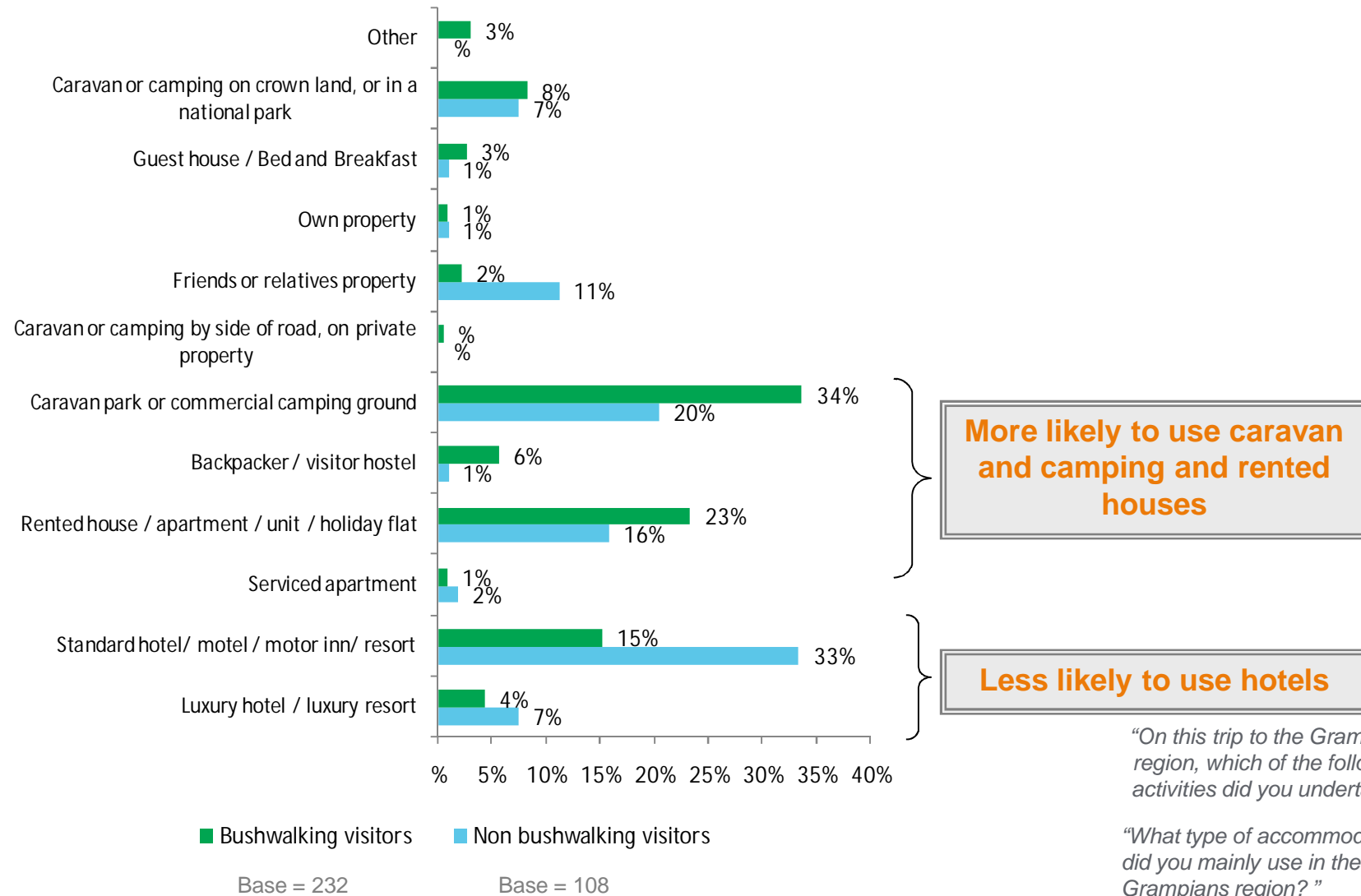
"Which of the following was the most important in choosing the Grampians region?"

Top 10 activities of visitors who went bushwalking

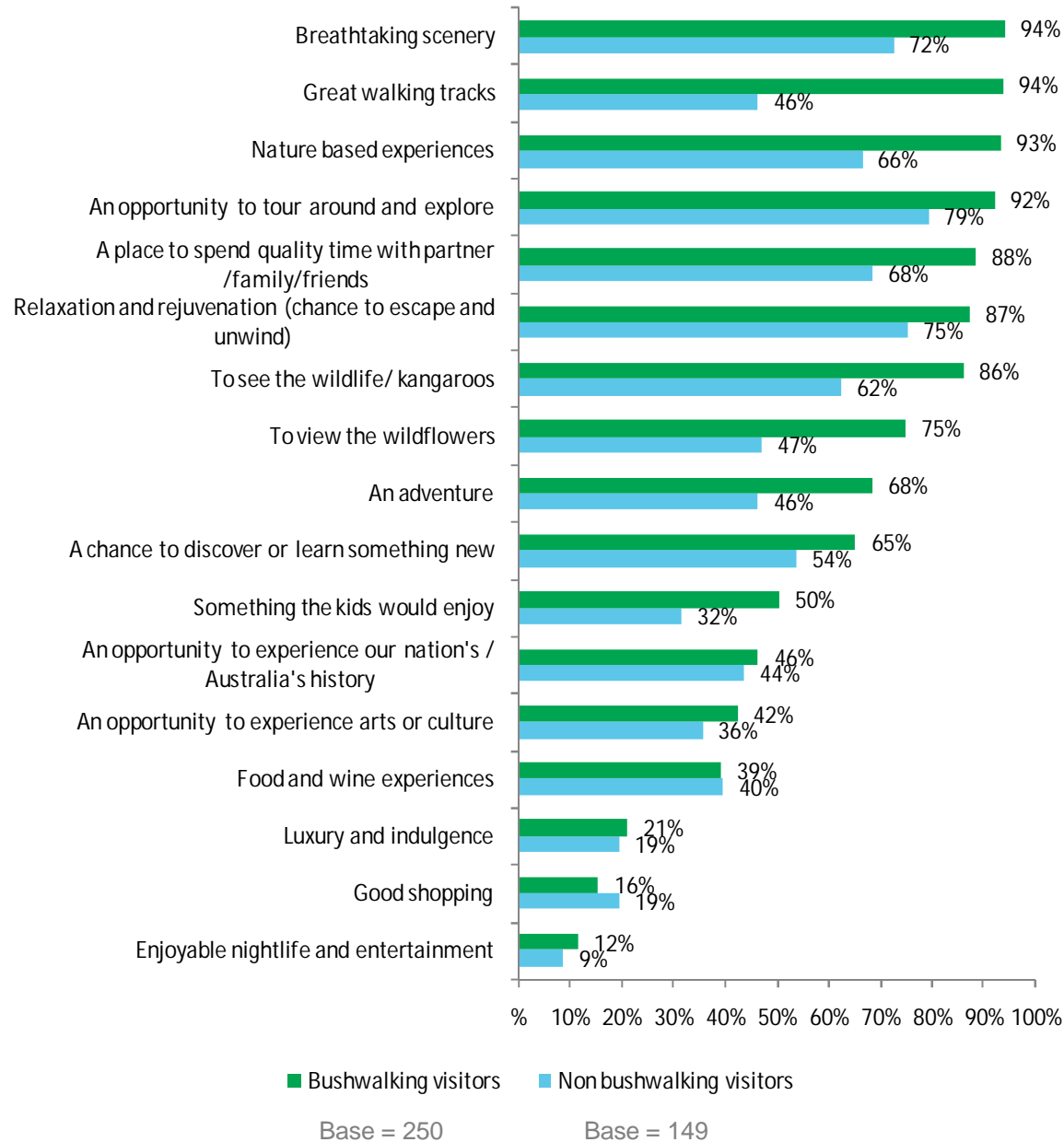


"On this trip to the Grampians region, which of the following activities did you undertake?"

Bushwalking visitors stayed in different accommodation to others



Expectations of bushwalking visitors



Bushwalking visitors generally had higher expectations than non bushwalking visitors

“On this trip to the Grampians region, which of the following activities did you undertake?”

“Which, if any, of the experiences listed below did you expect the Grampians region to offer?”

Appendix

Benchmark summary

- **Objective:** To allow destinations to compare the results from the Visitor Profile and Satisfaction (VPS) survey with results from other destinations
- **Sample size:** Relevant sample sizes appear in the first column on the first page
- **Significance testing:** No significance testing has been done on the figures
- **Categories:** Only standard categories are included – individual destinations may have included non-standard categories in their questionnaire that are not included in the summaries
- **Subgroup destinations:** The list of subgroup destinations appear on the first page of the summary. In most cases these were nominated by the destination or STO
- **Layout:**
 - **First page** - contains information that can be used to profile visitors to a region and to identify information and booking sources
 - **Second page** – contains information on visitor expectations and satisfaction including their likelihood to return

Benchmark summary

Three sets of results are included in each summary:

1. Average results for the destination
2. The difference between the average results for the destination and a nominated subgroup of destinations
3. The difference between the average results for the destination and all destinations

Key Metrics	Total Sat	V Sat
Overall Satisfaction	92%	58%
Difference to subgroup	↑ 4%	→ 0%
Difference to all	↑ 5%	→ 3%

Destination results

Benchmark summary

Dashboard symbols

- ↑ If a destination is more than 3 points above the subgroup or total
- If a destination is within +/- 3 points of the subgroup or total
- ↓ If a destination is less than 3 points below the subgroup or total

Trip Characteristics	DestA	Subgroup	All
Purpose			
Holiday	66%	↓ -16%	↓ -19%
Visiting friends and relatives	34%	↑ 16%	↑ 19%

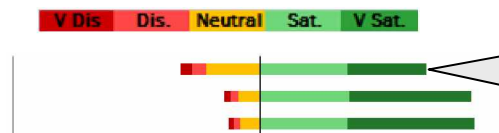
34% of respondents travelled to the region to visit friends and relatives

That is 16 percentage points more than the subgroup

Benchmark summary

Bar charts: The small horizontal bar charts on the second page show the full results (that is all points on the scale) for the respective categories

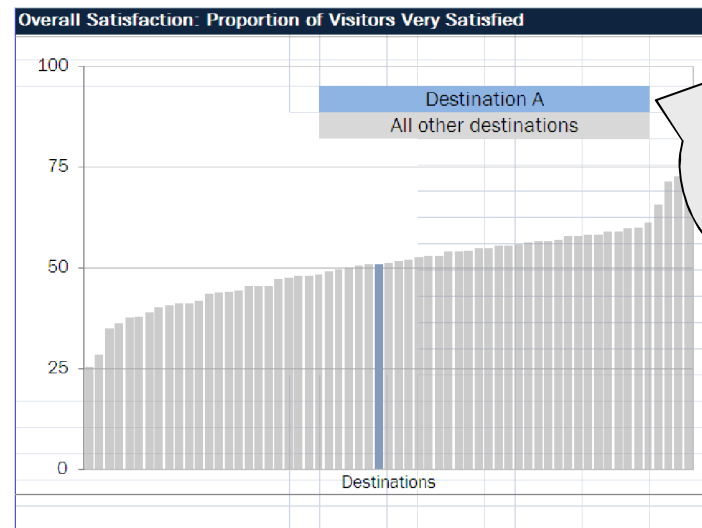
- All data displayed are for a 5 point scale
- The upper 2 categories on the scale are recorded as positive values and appear on the right side of the vertical axis. These correspond to total satisfaction.
- The lower 3 categories on the scale are recorded as negative values and appear on the left side of the vertical axis



This destination has a smaller proportion very satisfied with the destination than both the subgroup and all destinations

Benchmark summary

The large vertical bar chart on the second page shows the proportion of respondents in each destination that were 'Very satisfied' overall with their visit



In terms of overall satisfaction, Destination A is close to average in terms of the total number of respondents who were very satisfied with their visit.

Benchmark summary

- Some data are compared with a 'subgroup' of destinations in Victoria. The 'subgroup' includes:
 - Albury Wodonga
 - Bendigo
 - Echuca
 - Gippsland Lakes
 - Mildura
 - Murrindindi
 - Swan Hill
- Grampians data are included in both the benchmark and subgroup data.