



Goldfields Visitor Profile and Satisfaction Report: Summary and Discussion of Results

Introduction

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

This project was undertaken by TRA—in partnership with Goldfields Tourism, Ballarat Regional Tourism, City of Greater Bendigo and Tourism Victoria—to gain a better understanding of visitors to the region, including their motivations and satisfaction with their visit to the Goldfields region. This includes providing more reliable and detailed information on the region to assist with destination management including planning, development and marketing.

Method

The Goldfields VPS project was conducted in Ballarat and Bendigo during March and April 2011. The results are a snapshot of a specific time of the year, which needs to be taken into account when considering the results and in subsequent discussions and planning.

Since 2006, 72 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. Some destinations are surveyed during different times of the year in order to capture a broader range of visitors. In this event, only the most recent research for the destination is included. Comparisons against VPS benchmarks are made throughout this summary.

The following summary includes a discussion on the broad results for the Goldfields as well as a discussion on key differences between Ballarat and Bendigo.

Visitor and trip characteristics

The key characteristics of the survey sample for the Goldfields were as follows:

- The highest proportions of visitors were in the family life stage (41%) and older life stages (20% older working and 25% older non-working), with 34% travelling with their immediate family and 34% with their partner.
- The majority of visitors (56%) travelled to the region for holiday/leisure purposes. A fifth (21%) travelled to visit friends and relatives (VFR), which is eight points above the VPS benchmark. The proportion travelling for VFR purposes was driven by visitors to Bendigo, of whom 28% travelled for this purpose.
- More than nine in ten visitors (93%) to the Goldfields were domestic visitors, with 62% from Victoria, mainly Melbourne.



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- Visitors travelling to Bendigo for VFR purposes travelled with their immediate family (37%), partner (27%) or in a group with friends and/or relatives (21%). Nearly six in ten visitors (58%) were from outside Victoria.
- Around three quarters of visitors (76%) to the Goldfields were repeat visitors, seven points above the VPS benchmark. The proportion of repeat visitors was similar for Ballarat and Bendigo.
- Nearly half of visitors (49%) to the Goldfields used the internet for information on the region and 38% used it to make bookings. Accommodation operator sites were the most commonly used sites for both information and booking and were considered the most useful sites by 27% of visitors.
- There were a significantly higher proportion of visitors to Ballarat who used the internet for information (59%) compared with Bendigo (39%).
- Nearly three in ten visitors (29%) visited the Goldfields on a day trip. The proportion was driven by visitors to Ballarat with a third of visitors in Ballarat for a day trip.
- Day visitors to Ballarat were more likely to be from Victoria and in the young/midlife couple (no kids) life stage, than the overnight visitors.
- The majority of overnight visitors to the Goldfields stayed one or two nights (56%), with the median stay being two nights.
- Over a quarter of visitors to the Goldfields (26%) stayed in standard hotels/motels, 20% in commercial caravan or camping grounds, 18% with friends and/or relatives and 16% in luxury hotels/resorts.
- Visitors to Ballarat were more likely to stay in commercial accommodation including standard and luxury hotels and motels and commercial caravan or camping grounds, compared to visitors to Bendigo who stayed with friends and/or relatives.
- The majority of visitors only stayed overnight in one town in the Goldfields – 66% of visitors to Ballarat and 86% of visitors to Bendigo did not stay overnight anywhere else on their trip.
- The most commonly visited towns (including day visits) by those who visited Ballarat were Melbourne (25%), Daylesford (20%), Creswick (14%), Geelong (13%), Bendigo (10%) and Warrnambool (10%). The most common towns stopped at by those who visited Bendigo were Castlemaine (27%), Ballarat (13%), Daylesford (12%), Heathcote (11%) and Echuca (11%).

Motivations for visiting the Goldfields

Motivations for visiting the Goldfields region were to *visit the attractions* (35% gave this a reason for visiting), *experience history/heritage* (28%) and the *variety of things to see and do* (25%). In addition to these motivations:

- Visitors to Bendigo stated the single most important reason for choosing to visit was to visit *friends or relatives*, with 18% visiting *relatives*, and 11% visiting *friends*.
- Visitors to Ballarat also chose the region *to learn more about the Gold Rush* and because *it was easy to get to*. The single most important reason for visiting Ballarat for nearly three in ten visitors to Ballarat (29%) was to *visit specific attractions*.

The motivations around the attractions, variety and history/heritage followed through to the experiences expected by visitors to the Goldfields. Experiences that scored above the VPS benchmark in terms of expectations of the Goldfields in general were:

- *Experience our nation's/Australia's history* (73%, 24 points above)
- *Discover and learn something new* (67%, 12 points above)
- *Experience arts or culture* (56%, 20 points above)
- *Something the kids would enjoy* (45%, 14 points above)

In addition to these experiences, visitors to Bendigo also expected a range of other experiences around family and friends. These included:

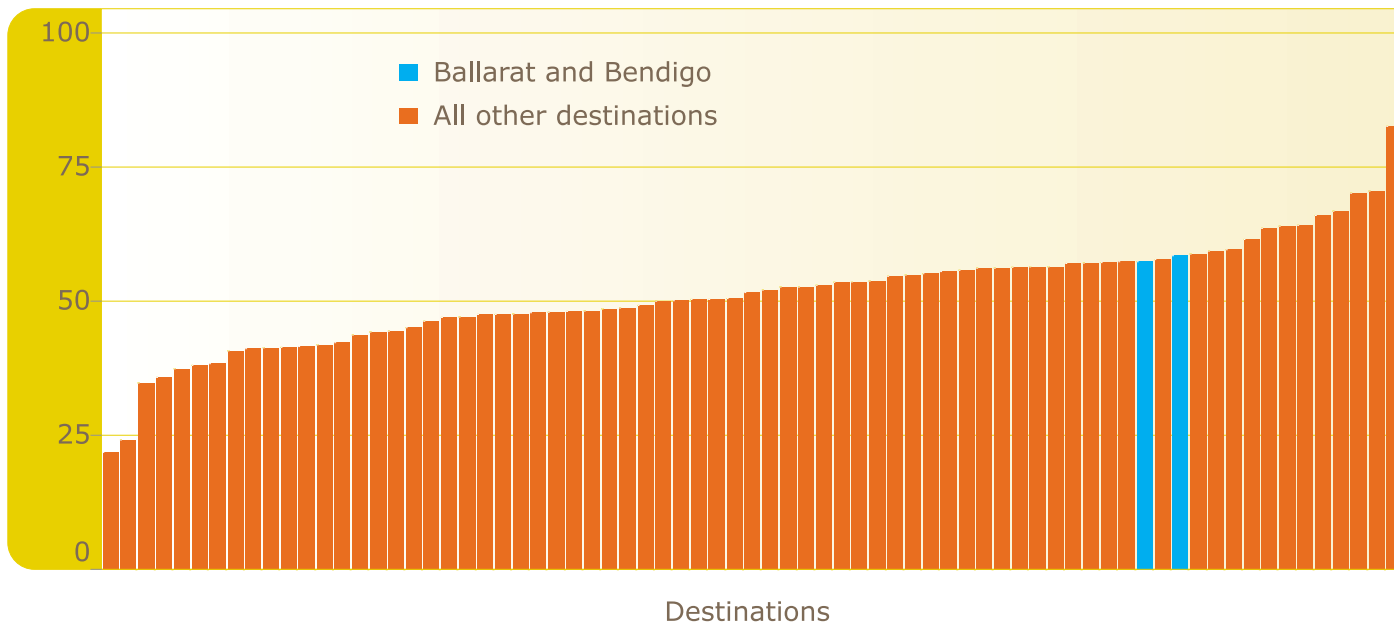
- *Spending quality time with others* (76%, 5 points above)
- *Food and wine experiences* (48%, 5 points above), and
- *Shopping* (40%, 4 points above)

These experiences were above the VPS benchmark in terms of experiences expected of Bendigo and was driven by VFR visitors.

Not surprisingly, the motivations and expectations of the Goldfields were reflected in the activities visitors undertook while in the region. Compared with the VPS benchmark, visitors were more likely to visit: *botanical or public gardens* (43%, 25 points above); *history/heritage buildings* (38%, 6 points above); and *museums or art galleries* (34%, 7 points above). The high proportion of visitors undertaking these activities was driven by visitors to Bendigo.

Satisfaction with the Goldfields

The figure below shows where Ballarat and Bendigo rank in satisfaction compared to all other participating VPS destinations. About 57% of visitors to Ballarat and 58% of visitors to Bendigo were very satisfied with their visit, more than six percentage points above the VPS benchmark of 51%.



Part of the relatively high satisfaction score for the Goldfields was the ability of the region to deliver on the four key experiences expected by visitors, with visitors rating the key experiences as better than expected compared with the VPS benchmarks. This result was consistent across Ballarat and Bendigo.

Other than these key experiences, there were a number of key drivers for this relatively high satisfaction with the Goldfields. These included:

- *Attractions* (86% NET¹ satisfied; 61% very satisfied)
- *Variety of things to see and do* (84%; 58%)
- *Customer service quality* (88%; 54%)
- *Food and beverage* (83%; 47%)
- *Activities for kids and families* (67%; 44%)
- *Value for money* (82%; 42%)

Satisfaction with these attributes, as well as all other attributes benchmarked, were above or similar to the VPS benchmarks – a remarkable result among destinations who have participated in the VPS program.

The open ended comments highlighted two main themes of visitor satisfaction around the experiences and trip attributes. Visitors were most happy with:

- The variety of natural and man-made attractions, especially the gardens, lakes, history/heritage sites, museums and galleries.
- The ambience of the town created by the old buildings, relaxed atmosphere and friendly locals.

¹ Results for 'Very satisfied' and 'Fairly satisfied' visitors combined

On the downside, visitors were less satisfied with the lack of public facilities, especially parking and public toilets, the cost of parking and the poor signage.

Overall, the survey results show that the variety of attractions and the local atmosphere created by the history and culture of the region were motivators for visiting the region for visitors, and the delivery of these key experiences resulted in relatively high satisfaction with the region.

Recommendations

The following recommendations are made for further consideration to assist the local industry with improving the region's productive capacity.

1. Stimulating consumer demand

- A key strength of the Goldfields is the wide variety of experiences around history, culture and nature, including things for the kids to do. This should be taken into consideration when marketing the region and increasing first-time visitation.

2. Improving product and service delivery

- The internet is a key source for visitors to obtain information on the region and to make bookings before their trip. The local industry should be encouraged to become more proficient in digital marketing and distribution, ensuring visitors can access information on the region easily online.
- Encouraging visitors to disperse across the entire region is important, with information services—including signage—a way of achieving this.
- Delivering quality tourism experiences is more than just delivery of the tourism product. The delivery needs to encompass all factors that contribute to the whole visitor experience, including accessibility, supporting infrastructure, services and amenities, quality service delivery as well as the natural or urban environment.

3. Product development and diversification

- The variety of attractions and general atmosphere created by the history and culture of the region were key strengths noted by visitors including those with kids. Future product development should consider these strengths, as those surveyed were particularly interested in tours around history and food and wine, and educational activities for the kids.
- Adapting tourism products and experiences to respond to the ever changing competitive environment, particularly around changing consumer attitudes and travel behaviour.

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Images:
Bendigo, Victoria
Courtesy of Tourism Victoria

Ballarat, Victoria
Courtesy of Goldfields Tourism

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