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GREAT OCEAN ROAD VISITOR PROFILE AND SATISFACTION REPORT

Summary of results

NOVEMBER 2013



GREAT OCEAN ROAD VISITOR PROFILE AND SATISFACTION REPORT: SUMMARY OF RESULTS

Most commonly, visitors to the Great Ocean Road region in this study saw the sights, ate out and went to the beach. The majority of visitors to the Great Ocean Road region expected *great coastal experiences and scenery, relaxation and rejuvenation, a place to spend quality time with family and friends and nature based experiences.*

The respondents were very satisfied with their visit to the Great Ocean Road region, particularly with *personal safety and security, variety of things to see and do, local atmosphere and attractions.*

These findings are from a Visitor Profile and Satisfaction (VPS) project completed under the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (TRA). The project was undertaken in partnership with Tourism Victoria, Great Ocean Road Regional Tourism, Shipwreck Coast Marketing and Geelong Otway Tourism to gain a better understanding of visitors to the region, including their motivations for visiting and satisfaction with their visit.

HOW WE CONDUCTED THIS STUDY

Data for the Great Ocean Road VPS project were collected on Easter weekend, March-April 2013. This study represents a snapshot of a specific time of the year, which needs to be taken into account when considering the results. For details of the standard methodology used in TRA's VPS projects, please refer to TRA's [website](#).

Survey respondents for this study were recruited at various locations around the Great Ocean Road region. A total of 453 respondents completed the survey.

The VPS program has been running since 2005 and the results from over 80 projects in Australian regional tourist destinations have been collated in the VPS Benchmark Database. This allows the results of each destination to be 'benchmarked' against other destinations. Care should be taken when making comparisons to benchmarks, as visitor composition may differ significantly across destinations and time periods.

In this study:

- The majority of respondents were domestic visitors (94%) with only 6% overseas visitors. The average for benchmark destinations is 12% overseas visitors.
- Over nine in ten visitors to the Great Ocean Road region stayed overnight (92%), with the remaining 8% being day visitors – less than the benchmark average of 28% day visitors.
- The proportion of respondents whose main purpose was holiday, at 87%, was higher than the benchmark average of 76%.
- A similar proportion of respondents cited visiting friends and relatives as the main purpose of the trip to the Great Ocean Road region when compared with the VPS benchmark (12% and 13% respectively).

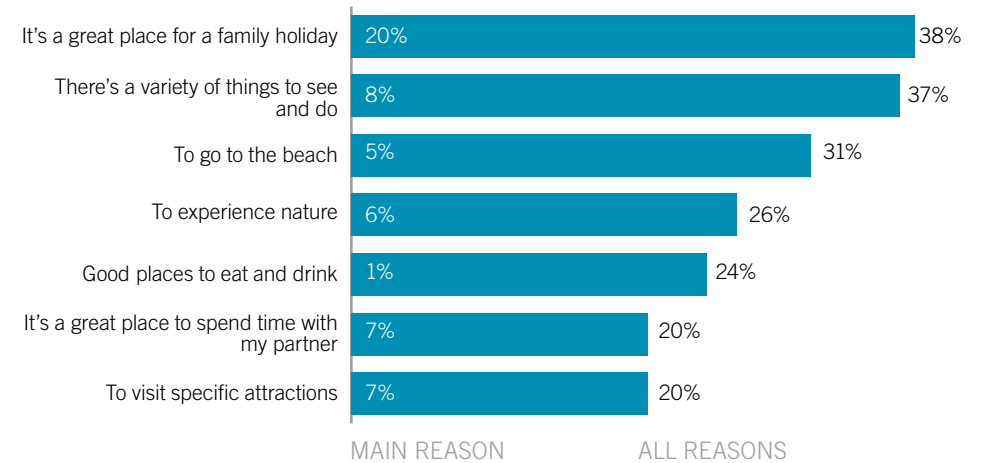


WHY THE GREAT OCEAN ROAD REGION?

Respondents were asked for both the main reason they chose to visit the Great Ocean Road region, as well as all the other reasons that led to their visit.

The recruitment period was over Easter weekend, traditionally a time for family holidays and this is reflected in *it's a great place for a family holiday* being both the top main reason and top overall reason for visiting the region. Not noted on this chart is the reason *1/my family or friends have a holiday house there* which was the main reason for visiting for 10% of respondents.

FIGURE 1: REASONS FOR CHOOSING THE GREAT OCEAN ROAD (MAIN REASON AND ALL REASONS)



Base: Excludes 'don't know' responses. Multiple responses allowed for all reasons. Only reasons provided by 20% or more of respondents to 'all reasons' are shown.

EXPERIENCES

Respondents were asked what they expected to experience in the Great Ocean Road region, and whether or not those expectations were met.

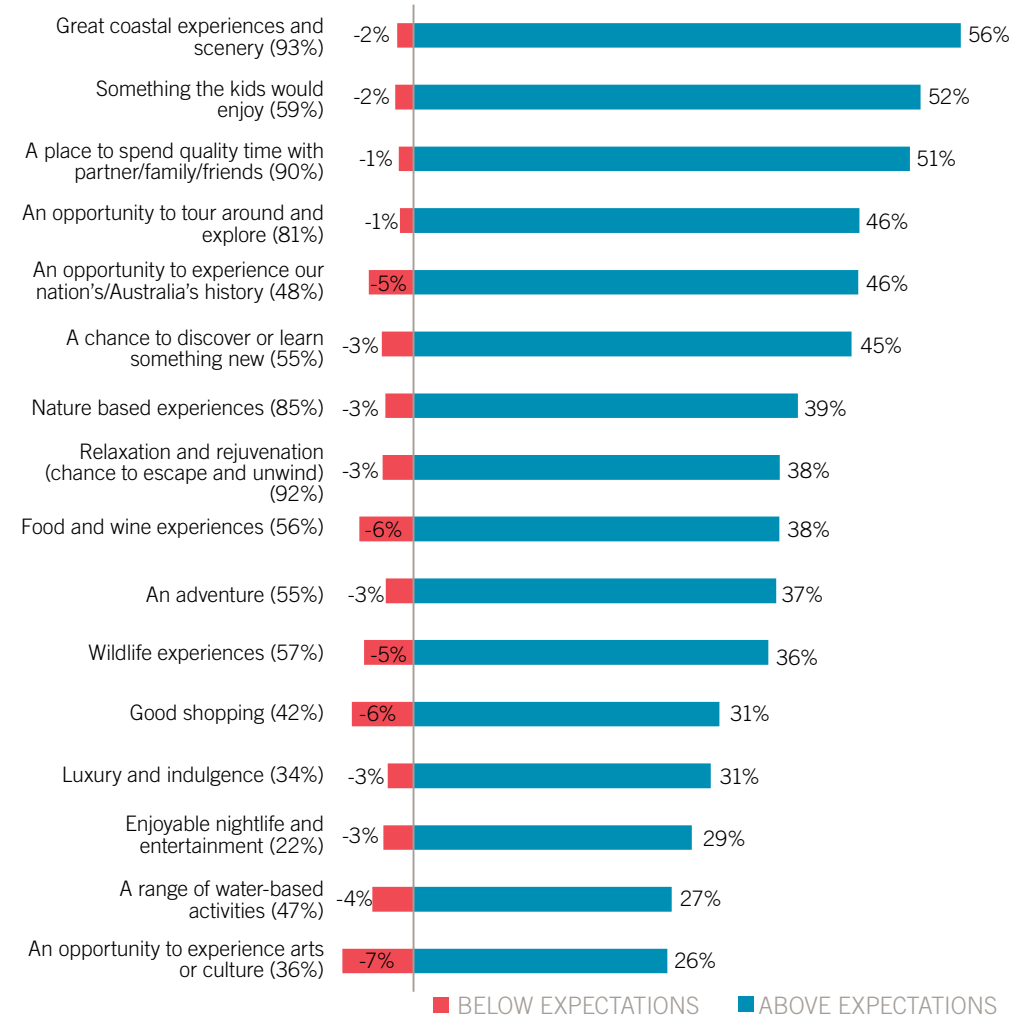
Compared to other benchmark destinations, respondents were likely to expect many experiences in the Great Ocean Road region – expectations for the following were more than 15 percentage points higher than the benchmark:

- *something the kids would enjoy*
- *nature based experiences*
- *a place to spend quality time*
- *relaxation and rejuvenation.*

Over one-quarter of respondents reported that their experiences were better than expected on all attributes in the Great Ocean Road region. Overall, whether expectations were met received similar ratings to the VPS benchmark, but none were rated as better than the benchmark.

FIGURE 2: EXPERIENCES EXPECTED

EXPERIENCE (% EXPECTING EXPERIENCE)



The numbers on the chart indicate the proportion of respondents expecting that experience.

Base: Excludes 'don't know' responses for expected experiences.

For the rating of experiences the base is the proportion of respondents expecting that experience.

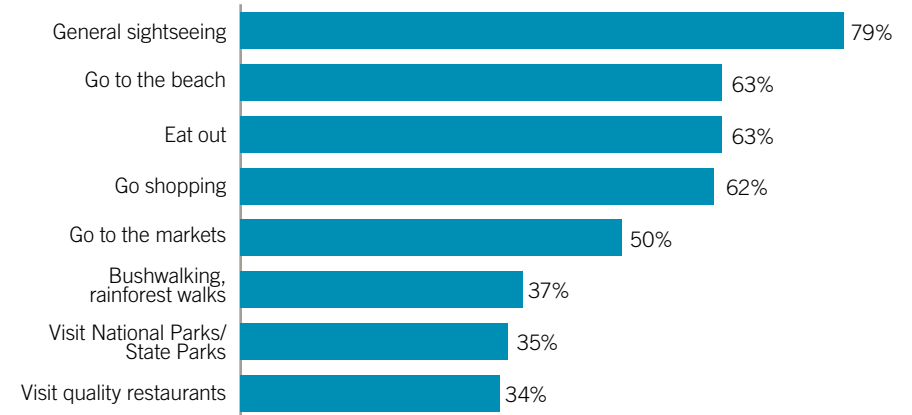
ACTIVITIES AND ATTRACTIONS

Respondents were asked to indicate if they had undertaken a number of activities on their trip to the Great Ocean Road region and which attractions they visited.

General sightseeing, going to the beach and eating out were the most common activities in the region.

Lorne Pier was the most popular attraction, with Port Fairy Wharf and Warrnambool Foreshore also popular with visitors.

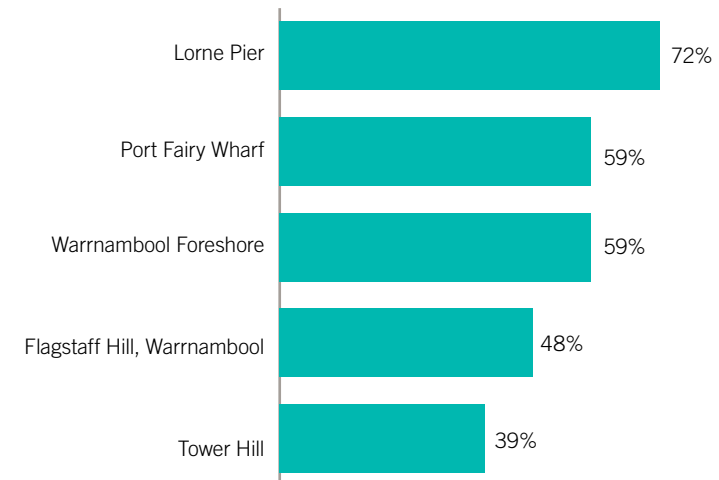
FIGURE 3: TOP ACTIVITIES



Base: Excludes 'don't know' responses.

Only activities undertaken by over 30% of respondents are shown.

FIGURE 4: TOP 5 ATTRACTIONS VISITED



Base: Excludes 'don't know' and 'not answered' responses.

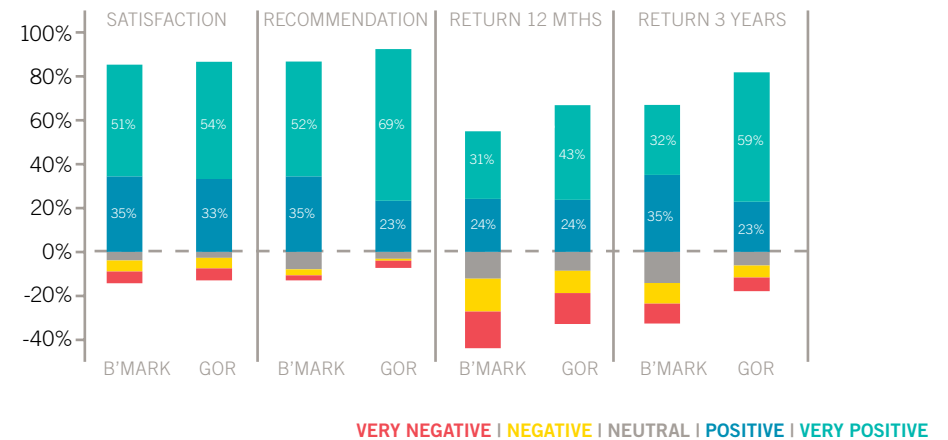
WERE THEY HAPPY WITH THEIR VISIT?

Respondents were asked a range of questions about their satisfaction with the Great Ocean Road region, whether or not they would recommend the destination and their likelihood of returning.

The Great Ocean Road region performed better than the benchmark for all satisfaction indicators illustrated in Figure 5. Most notably, likelihood to return was 12 points higher than the benchmark in the next 12 months and 15 points higher in the next three years.

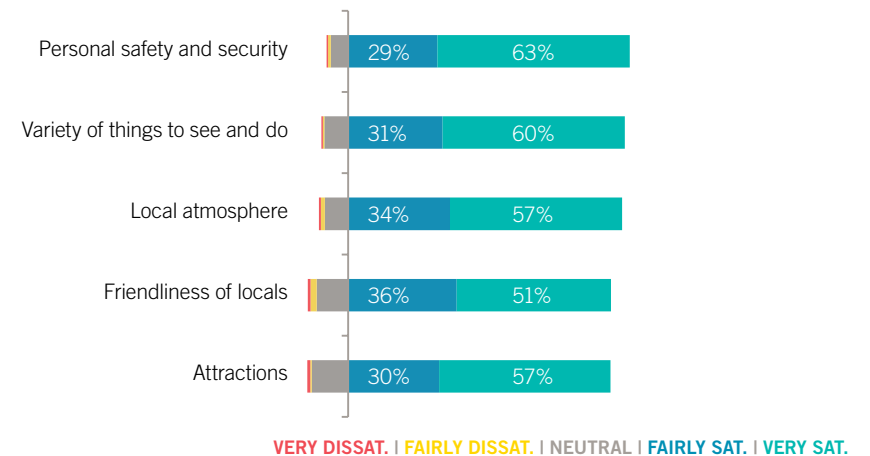
Satisfaction with *personal safety and security*, *variety of things to see and do*, *local atmosphere* and *attractions* was above the VPS benchmark. Satisfaction with *commercial accommodation* and *entertainment and nightlife* was also high. *Parking* was the only trip aspect rated above the benchmark for dissatisfaction.

FIGURE 5: SATISFACTION, RECOMMENDATIONS AND LIKELIHOOD OF RETURNING



Base: Item responses have been classified as either positive or negative for ease of display. B'mark = Benchmark. GOR = Great Ocean Road For the actual labels used on the questionnaire, please go to www.tra.gov.au.

FIGURE 6: BEST THINGS ABOUT THE GREAT OCEAN ROAD (HIGHEST SATISFACTION SCORES)



Base: Excludes 'don't know' responses.

WHAT WERE THE CHARACTERISTICS OF THEIR TRIP?

TRAVEL PARTY, TRANSPORT, ACCOMMODATION & TRIP PLANNING

- Respondents were most likely to be travelling with immediate family (41%).
- Nearly all visitors to the Great Ocean Road region were self-drive in their own or rented vehicle (95%, 16 points higher than the VPS benchmark).
- The most popular accommodation on Easter weekend in the Great Ocean Road region was caravan parks or commercial camping grounds (24%). Rented houses or apartments were also popular (18%, 10 points higher than the benchmark).
- The vast majority of visitors to the Great Ocean Road region were return visitors (87%, 18 points higher than the VPS benchmark).
- In the past 12 months, repeat visitors were most likely to have been to the region once (46%), and this jumped up to visiting more than 5 times in the last three years (38%).
- Over half of all visitors planned their trip to the Great Ocean Road region more than one month before their visit (59%: 31% more than three months; 28% one to three months).
- The internet was the most popular information source, and also the most common booking method – nearly seven in ten visitors to the Great Ocean Road region used the internet to search for information relating to their trip (67%), while nearly six in ten visitors made bookings using the internet (57%).
- Visitors to the Great Ocean Road region rated accommodation operator sites as the most useful websites they used (32%).
- *Visit Warrnambool* was the most used destination website (34%) and rated as the third most useful website overall (7%).
- For those visitors that used mobile technology in planning their trip, the most popular devices were hand held computers or phones for browsing. Google maps applications were also popular for trip planning.

PROFILE OF SURVEY RESPONDENTS

This profile is provided to help interpret the findings of the VPS study.

It should not be interpreted as a profile of all visitors to the Great Ocean Road region as it relates to a particular point in time and data was collected from a limited number of locations at the destination.

	GOR	BENCHMARK	
Purpose	Holiday	87%	77%
	VFR	12%	13%
	Business	1%	4%
	Other	1%	5%
Origin	Intrastate	80%	45%
	Interstate	15%	44%
	New South Wales	4%	32%
	Victoria	84%	32%
	Queensland	3%	15%
	South Australia	7%	8%
	Western Australia	1%	4%
	Tasmania	0%	5%
	Northern Territory	0%	1%
	Australian Capital Territory	0%	3%
Overseas	6%	11%	
Gender	Female	70%	57%
	Male	30%	43%

	GOR	BENCHMARK	
Age group	15 to 24	4%	6%
	25 to 34	17%	14%
	35 to 44	29%	17%
	45 to 54	22%	21%
	55 to 64	19%	25%
	65+	9%	17%
Lifecycle	Young/midlife single with no kids	7%	9%
	Young/midlife couple with no kids	15%	12%
	Family	48%	33%
	Older working single/couple	18%	19%
Travel party	Older non-working single/couple	12%	26%
	No one else (alone)	3%	7%
	Partner	32%	43%
	Immediate family	41%	24%
	Friends and/or relatives	24%	20%
	Other	1%	3%
Household income	\$1 to \$4,199	1%	1%
	\$4,200 to \$8,299	0%	1%
	\$8,300 to \$15,599	1%	4%
	\$15,600 to \$25,999	3%	8%
	\$26,000 to \$36,399	6%	11%
	\$36,400 to \$51,999	10%	16%
	\$52,000 to \$77,999	19%	21%
	\$78,000 to \$103,999	17%	16%
	\$104,000 to \$129,999	13%	9%
	\$130,000 to \$149,999	10%	5%
\$150,000+	20%	10%	

