Phillip Island Visitor Profile and Satisfaction Report: Summary and Discussion of Results

Introduction

The Phillip Island 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 Destination Phillip Island and Tourism Victoria—to gain a better understanding of visitors to the region, including their motivations and satisfaction with their visit to Phillip Island. By providing more reliable and detailed information on the region, this project aims to assist with destination management including planning, development and marketing.

Method

The Phillip Island VPS project was conducted during March and April 2012. 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.

Survey respondents were recruited at various locations in Phillip Island through two methods: face-to-face intercept interviews, or completion of contact details on postcards. Respondents were then invited to participate in an online questionnaire, resulting in a sample of 329.

Since 2006, 77 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.

Additionally, some data are compared with a *subgroup* of destinations that have similar attributes to the Phillip Island region. The subgroup includes: Albury Wodonga, Ballarat, Bendigo, Daylesford Macedon Ranges, Echuca, Gippsland Lakes, Grampians, High Country, Mildura, Mornington Peninsula, Murrindindi, Swan Hill and Yarra Valley.

Visitor profile[1]

With a range of nature-based experiences and attractions, Phillip Island attracts visitors from Australia and around the world. Of the survey respondents, three-quarters of Phillip Island visitors were domestic visitors, while a quarter were international visitors. International visitors were significantly more likely to be in Phillip Island for a day trip compared to domestic visitors.

[1] For the purpose of this report, 'visitor' refers to the survey respondents. The results of this survey have not been weighted.

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Visitor origin

- The vast majority of visitors (94%) were in Phillip Island for holiday/leisure purposes (including sport, entertainment and shopping), which was above both the subgroup and VPS benchmarks.
  - The majority of domestic visitors (77%) were from Victoria—21% were from Melbourne, while 79% were from regional Victoria.
  - The largest proportion of international visitors was from the United Kingdom (29%).

Purpose and frequency of visit

- The vast majority of visitors were in Phillip Island for holiday/leisure purposes (including entertainment, sport and shopping), above both the subgroup and VPS benchmarks.
- Over half of visitors to Phillip Island were repeat visitors (59%), nine points lower than the VPS benchmark. In the previous 12 months, two-thirds of visitors had been to Phillip Island once, while over one-third (37%) had been in the last three years.
- Domestic visitors were significantly more likely to be repeat visitors, while international visitors were significantly more likely to be first-time visitors.

Life stage and travel party

- The age of visitors to Phillip Island did not vary greatly compared with the benchmarks, 59% were aged 45 years or over, similar to 63% for the VPS benchmark. However, 20% of visitors were aged 25–34 years, which was six points higher than the VPS benchmark.
- The highest proportion of visitors were in the family life stage (31%), followed closely by older non-working couples and singles (26%). All life stages were close to the VPS benchmark.
- Nearly nine in ten visitors travelled to Phillip Island in a group; the highest proportion travelled with their partner (45%).
- There were significant differences in life stages between domestic and international visitors. Domestic visitors were more likely to be families, while international visitors were more likely to be young/midlife couples.

Trip planning and booking

- One-quarter of visitors planned for their trip one to three months before.
- Nearly two-thirds of visitors used the internet for information (64%). Around one-quarter of visitors (24%) only used the internet for information. Other popular information sources included the local Visitor Information Centre after arriving (36%) and knowledge from visiting before (33%).
- Official government and tourism sites were the most common sites used for information (48%). This was well above the subgroup and VPS benchmarks. Accommodation operator sites were also popular sites for information (34%) reflecting the large proportion of overnight visitors. However, this was below the subgroup and VPS benchmarks.
- When comparing all types of bookings, the highest proportion of visitors made bookings through the internet (37%), and a further 14% booked through the Visitor Information Centre after arriving at Phillip Island.
- Over half of visitors (59%) visited www.visitphillipisland.com, and one-third of visitors (36%) also considered this the most useful website.
- Nearly half of all visitors used mobile technology such as GPS or mobile applications (47%). GPS navigation devices were the most popular mapping technology (66%).
- Domestic visitors were significantly more likely to use their own previous experience and book on the internet than international visitors.
- International visitors were significantly more likely to plan while on the road, and use Visitor Information Centres in the destination for information and bookings than domestic visitors.

Travel behaviour

Transport and travel routes

- Nearly all visitors to Phillip Island were self-drive (93%, 14 points above the VPS benchmark); only 5% used a bus or coach.
- A large proportion of visitors arrived in Phillip Island on the Monash Freeway via Cranbourne (40%) and left the same way (41%).

Overnight stays and accommodation

- Nearly three-quarters of visitors to Phillip Island stayed overnight (71%)—61% of trips were for one to two nights, and the median stay was two nights.
- The highest proportion of visitors stayed in a caravan park or commercial camping ground (26%).
- Less than one in five visitors stayed in a rented house, apartment or flat (18%) or a standard hotel, motel or resort (below four stars; 17%).

Towns visited

- The majority of visitors stopped in Cowes (88%) and San Remo (51%).
- Most towns stopped at were for a day visit, with the exception of Cowes—59% of visitors to Cowes stayed overnight.
- All visitors that stopped at Churchill Island stopped for a day visit, and 99% of visitors to Rhyll were day visitors.

Motivations for visiting Phillip Island

Reasons for visiting

- The single most important reason to visit the region was to visit specific attractions (24%).
- The main reasons for visiting Phillip Island were:
  - to visit specific attractions (45%)
  - variety of things to see and do (35%)
  - a wildlife experience (30%)
- Domestic visitors were significantly more likely to have chosen Phillip Island for the *variety of things to see and do; to spend time with their family or partner; because it is close to home*; or *because of accommodation deals* when compared to international visitors.
- International visitors were significantly more likely to have chosen Phillip Island to *visit a specific attraction*; *to learn about the natural environment*; *to have a wildlife experience*; or *because it was recommended* when compared to domestic visitors.

Expected experiences

- Expectations for many experiences were above the benchmarks, particularly nature-based experiences—30 points above the VPS benchmark.
- Visitors to Phillip Island expected to *experience nature and wildlife*; *to tour*; *have adventures*; *learn*; and *relax and reconnect with family and friends*, but were less likely to expect to have experiences around *history, arts and culture*; *luxury and indulgence*; *food and wine*; and *shopping*, when compared to the VPS benchmarks.
- Domestic visitors were significantly more likely to expect *relaxation and rejuvenation*; *luxury and indulgence*; *arts or culture*; *enjoyable nightlife*; *good shopping*; *food and wine experiences*; *to spend quality time with family and friends*; *events*; and *beaches*, when compared to international visitors.
- International visitors were significantly more likely to expect *nature-based* and *wildlife experiences*, and the *chance to discover something new* compared to domestic visitors.

Activities undertaken

- *General sightseeing* (73%), *visiting attractions* (61%) and *eating out* (57%) were the most common activities in the region.
- A higher proportion of visitors were very satisfied with the attractions in Phillip Island than the VPS benchmark.
- Domestic visitors were significantly more likely to *go on a skippered charter boat*; *cruise or ferry ride*; *do some general sightseeing*; *visit museums or galleries*; and *go shopping*, when compared to international visitors.
- International visitors were significantly more likely to *visit a wildlife park* compared to domestic visitors.

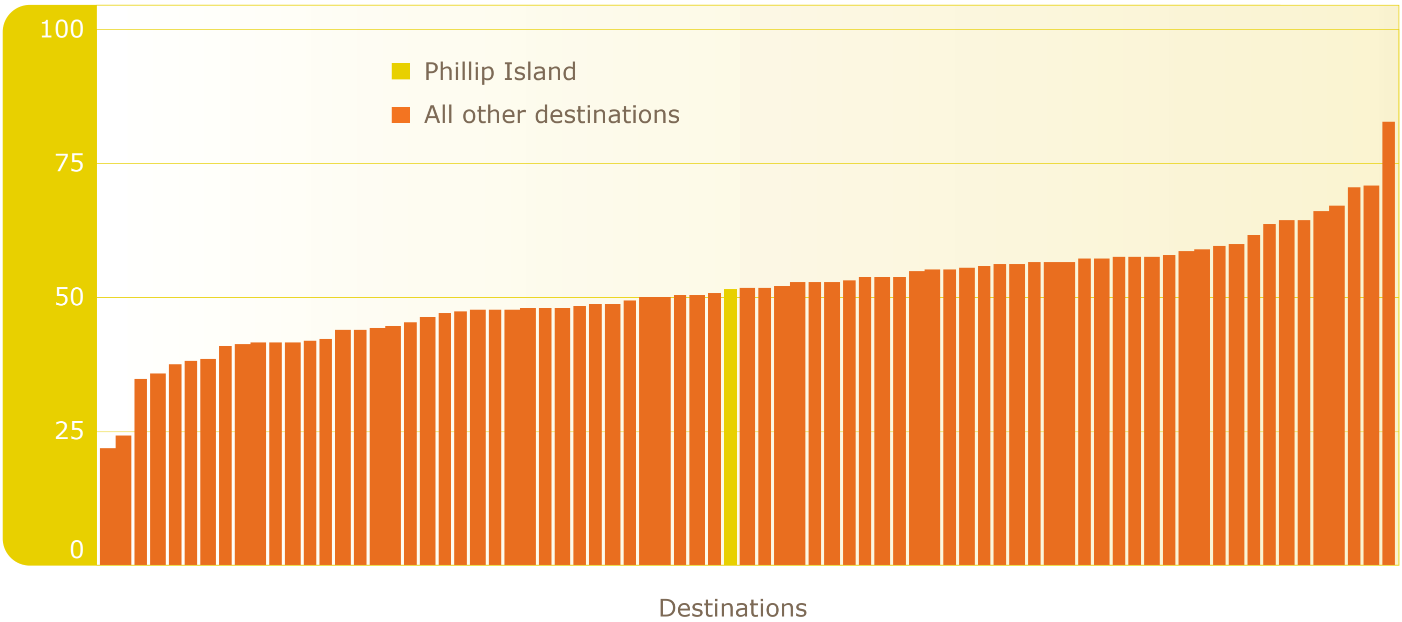
Attractions visited

- Penguin Parade was the most popular attraction on Phillip Island, with 58% of visitors attending. Other popular attractions included the Phillip Island Chocolate Factory (45%) and the Koala Conservation Centre (30%).
- Domestic visitors were significantly more likely to visit pelican feeding at San Remo, Phillip Island Chocolate Factory, National Vietnam Veterans Museum, Rhyll Trout and Bush Tucker Farm, A Maze'N Things and the Grand Prix Circuit compared to international visitors.
- International visitors were significantly more likely to visit Penguin Parade and the Koala Conservation Centre compared to domestic visitors.

Satisfaction with Phillip Island

The figure below shows where Phillip Island ranks in overall satisfaction compared to all other participating VPS destinations.

- Over half of visitors were very satisfied with their visit to Phillip Island (51%), equal to the VPS benchmark.
- When comparing domestic and international visitors, international visitors were more satisfied with their visit (55% very satisfied) compared to domestic visitors (50%).
- Overall, satisfaction was higher for older working visitors (60% very satisfied), visitors travelling alone (56% very satisfied), international visitors and repeat visitors (both 55% very satisfied).



- When comparing NET[2] satisfaction between VPS destinations, the result for Phillip Island is similar to the VPS benchmark. About 87% of visitors were satisfied with their visit to Phillip Island, one point above the VPS benchmark.

Overall satisfaction drivers

- There were four key drivers of overall satisfaction:
  - attractions (88% NET satisfied; 56% very satisfied)
  - value for money (74%; 30%)
  - food and beverage (75%; 32%)
  - being a family friendly destination (80%; 49%)
- With the exception of *attractions*, the proportions for *value for money* and *food and beverage* were less than the VPS benchmarks for NET satisfied and very satisfied. In other words, as key drivers of overall satisfaction in Phillip Island, these attributes were not competitive with the VPS benchmark and can explain in some part why overall visitor satisfaction in Phillip Island (51% very satisfied) was not higher.

[2] Results for 'Very satisfied' and 'Fairly satisfied' visitors combined.

- For international visitors, *local atmosphere* was also a driver of overall satisfaction, as was commercial accommodation for domestic visitors.
- From the open-ended comments, visitors were happy with the *attractions* and *variety of things to see and do* in Phillip Island, as well as the *information services*, *friendliness of locals* and *compactness of the region*.
- However, some visitors were unhappy with *food and beverage* options available in Phillip Island, the *commercial accommodation*, *value for money* and *shopping* available, as well as accessibility such as *signage* and *condition of the roads*.
- Although there are clear areas for improvement, over half of visitors were very likely to recommend Phillip Island to other people as a destination to visit (55%).
- There was also strong intention to return with nearly half of visitors to Phillip Island (46%) being likely to return in 12 months, however, nearly one-quarter (24%) were very unlikely to return (seven points below the VPS benchmark). Results were similar for the next three years.

Recommendations

Despite the overall satisfaction score being equal to the VPS benchmark, there is scope to improve offerings, with a particular focus on value for money. This is important in converting first-time visitors into repeat visitors.

While visitors to Phillip Island were satisfied with the attractions and information services, the local industry should consider improving the region's value for money and the food and beverage options available so as to remain competitive both domestically and internationally.

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

1. Stimulating consumer demand
   - A key strength of Phillip Island is the variety of nature experiences available in a scenic location, just a short drive from Melbourne. While visitors were happy with the *variety of things to see and do*, low satisfaction of first-time visitors (46% very satisfied) compared to repeat visitors (55%, four points above the benchmark) indicates that there are areas the industry should focus on to ensure that first-time visitors return and become advocates for the region. *Food and beverage*, *commercial accommodation*, *shopping* and *entertainment/nightlife* are some areas where there is room for improvement.
2. Improving product and service delivery
   - The internet is a key source for information and bookings before visitors' trips. While www.visitphillipisland.com was considered the most useful website, local attractions and businesses should also be encouraged to become more proficient in digital marketing and distribution ensuring visitors can access information on the region and make bookings easily online.
   - Encouraging visitors to disperse across the entire region is very important. While visitors were satisfied with *information services* and Visitor Information Centres were used widely for information and bookings, improving road and street signage will further help to encourage the dispersal of visitors throughout the region.
   - 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 *value for money*, *accessibility*, *supporting infrastructure*, *services and amenities*, *quality service delivery* as well as the *natural or urban environment*.
3. Product development and diversification
   - *Nature-based*, *touring and exploring*, and *wildlife experiences* were among many experiences expected by visitors to Phillip Island. With the exception of *nature-based* and *wildlife experiences*, most experiences did not exceed expectations when compared with the benchmark. Future tourism development aimed at these should be sympathetic to the key characteristics of the region.
   - Consider 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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