



Marysville and Eildon Visitor Profile and Satisfaction Report: Summary and Discussion of Results

Introduction

The Marysville and Eildon 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 Murrindindi Shire Council, Yarra Ranges Regional Marketing and Tourism Victoria—to gain a better understanding of visitors to the region, including their motivations and satisfaction with their visit to Marysville and Eildon. By providing more reliable and detailed information on the region, this project aims to assist with destination management planning, development and marketing.

Method

The Marysville and Eildon VPS project was conducted during April and May 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 around Marysville and Eildon 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 253.

Since 2006, 78 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. For these cases, 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 Marysville and Eildon region. The subgroup includes: Albury Wodonga, Ballarat, Bendigo, Daylesford Macedon Ranges, Echuca, Gippsland, Grampians, High Country, Mildura, Murrindindi, Swan Hill, Yarra Valley and Phillip Island.

Visitor profile¹

With a range of nature-based experiences and attractions a short drive from Melbourne, the Marysville and Eildon region attracts a mixture of day and overnight visitors. A little under half of visitors to Marysville and Eildon were day visitors (41%), 14 percentage points above both the subgroup and VPS benchmarks.

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 and purpose of visit

- Nearly all visitors were domestic travellers (99%). The majority of domestic visitors (94%) were from Victoria, with 28% from Melbourne and 72% from regional Victoria.
- The majority of visitors (89%) were in Marysville and Eildon for holiday/leisure purposes (including entertainment and sport). This was above both the subgroup and VPS benchmarks.

Life stage and travel party

- Over half of visitors were aged 35 to 54 years (51%), 13 points above the VPS benchmark.
- The proportion of visitors aged 55 years or over (31%) was 11 points below the VPS benchmark.
- Half of all visitors were in the family life stage (50%), well above the subgroup and VPS benchmarks. Marysville and Eildon visitors were less likely to be in the older non-working life stage compared to the VPS benchmark.
- Over one-third of visitors travelled with immediate family (36%), 12 points above the VPS benchmark. A further 31% travelled with their partner.
- Day visitors were more likely to be young/midlife couples or older non-working visitors and travelling with friends or relatives. Overnight visitors were more likely to be in the family life stage and travelling with immediate family.

Trip planning and booking

- Several respondents commented that they had been coming to the region for many years.
'We have been coming for years and love the area. We were so sad for the bushfires and what it did to the area so were more than happy to be able to come back so that we could support the local community.' (Male, 40, travelling with immediate family)
- This sentiment is reflected in repeat visitation. Marysville and Eildon visitors were more likely to be return visitors (78%) compared with the VPS benchmark (68%).
- The majority of visitors to Marysville and Eildon had visited more than once in the previous 12 months (61%) and 84% had visited more than once in the past three years.
- With a large proportion of return visitors, it is not surprising that Marysville and Eildon visitors were more likely than the VPS benchmark to plan their trip in the week before, with nearly one-third of visitors (32%) doing so, 17 points above the benchmark.
- Again reflecting the proportion of return visitors, over half of visitors (52%) used knowledge from a prior visit to make choices about their trip. This was above both the subgroup and VPS benchmarks.
- A further 38% of visitors used the internet for information, but this was below both the subgroup and VPS benchmarks. Visitors who used the internet for information reported that accommodation operator sites (44%) and official government and tourism sites (40%) were the sites they used most often, with accommodation operator sites being the most useful (22%).
- Nearly two-thirds of visitors (64%) did not make any bookings for their trip, which was well above the subgroup and VPS benchmarks. However, 23% of visitors did use the internet to make bookings. Accommodation operator sites were the most common sites used for internet bookings (47%).
- The two most popular destination websites were www.marysvilletourism.com (37%) and www.visitvictoria.com (35%).
- Day visitors were *significantly more likely* to plan their trip the day or week before and not make bookings compared to overnight visitors. Overnight visitors were *significantly more likely* to be repeat visitors, plan two to three weeks before and use the internet for bookings compared to day visitors.
- Just over half of all visitors (53%) used mobile technology while in the region. GPS navigation devices were the most popular mobile technology (49%), followed by handheld computers or phones (21%).

Travel behaviour

Transport and travel routes

- Nearly all visitors to Marysville and Eildon were self-drive (99%), which was above both the subgroup and VPS benchmarks.
 - The Maroondah Highway via Melbourne, Healesville, and Narbethong was the most common route into (52%) and out of (46%) Marysville.
 - The most common route into (57%) and out of (52%) Eildon was also the Maroondah Highway via Melbourne, Healesville, Narbethong, Buxton, Taggerty and Thornton.

Towns visited

- Over half of all visitors to the region visited Marysville (54%), while just under half visited Eildon (42%). Marysville attracted a larger proportion of day visitors (49%), while visitors to Eildon were more likely to stay overnight (75%).

Overnight stays and accommodation

- Visitors to Marysville and Eildon were more likely than the VPS benchmark to stay in a caravan park or commercial camping ground (32% compared to 24%) or their own property (11% compared to 1%). They were also more likely to stay on a privately owned boat/yacht (6% compared to 0.1%); a reflection of the popularity of houseboats and water sports in the region.

Motivations for visiting Marysville and Eildon

Reasons for visiting

Two of the main reasons for visiting the region were to *support Marysville following the fires* (40%) and *see the bushfire recovery* (33%). The most important reason was to *support Marysville following the fires* (19%).

Day visitors were *significantly more likely* to have chosen Marysville and Eildon to *visit specific attractions* and to *see the bushfire recovery* and *support Marysville after the fires* compared to overnight visitors.

Overnight visitors were *significantly more likely* than day visitors to have chosen Marysville and Eildon to *visit friends*, *because it's a great place for a family holiday*, *to spend time with their partner*, *because of its proximity to Melbourne*, or *because they have a holiday house there*.

Visitors were asked specifically about the impact of the 2009 fires in Marysville. The majority did not stop going to Marysville following the fires (81%), with only 12% of visitors reluctant to visit at that time. The majority also felt that Marysville was ready for more tourists (82%).

In addition to the devastating bushfires, Australia's drought has led to low water levels in Lake Eildon in recent years and the presence of blue-green algae. These factors could have affected visitation levels, particularly given the popularity of watersports in the region. However, close to three-quarters of visitors said the water levels (76%) and blue green algae (73%) did not impact their visitation.

Expected experiences

Visitors expected to *experience relaxation and rejuvenation* (85%) and to *spend quality time with family and friends* (84%), both of which were above the VPS benchmark. Other expectations above the benchmark were *nature-based experiences* (82%) and *something the kids would enjoy* (53%).

Marysville and Eildon visitors were less likely than the VPS benchmarks to expect to have experiences around *good shopping* (16%, compared to 35%), *arts or culture* (30%, compared to 36%), *experiencing Australia's history* (35%, compared to 48%) and *food and wine experiences* (41%, compared to 72%).

Day visitors were *significantly more likely* to expect an opportunity to *experience arts or culture* compared to overnight visitors, while overnight visitors were *significantly more likely* to expect *relaxation and rejuvenation*, *something the kids would enjoy* and a *range of water-based activities* compared to day visitors.

Activities undertaken

General sightseeing (68%), eating out (46%) and shopping (42%) were the most common activities in Marysville and Eildon. However, compared with the VPS benchmark (more than 10 points lower), Marysville and Eildon visitors were less likely to:

- eat out at a hotel, restaurant or club
- visit history/heritage buildings, sites or monuments
- go on an organised tour
- go shopping
- visit museums or art galleries.

Day visitors were significantly more likely to visit museums or art galleries and visit history/heritage buildings, sites or monuments compared to overnight visitors.

Overnight visitors were significantly more likely to go fishing, go to the markets, have picnics or BBQs, visit friends or relatives, go shopping, play golf, attend a festival or event and participate in sailing/boating/house boating compared to day visitors.

Attractions visited

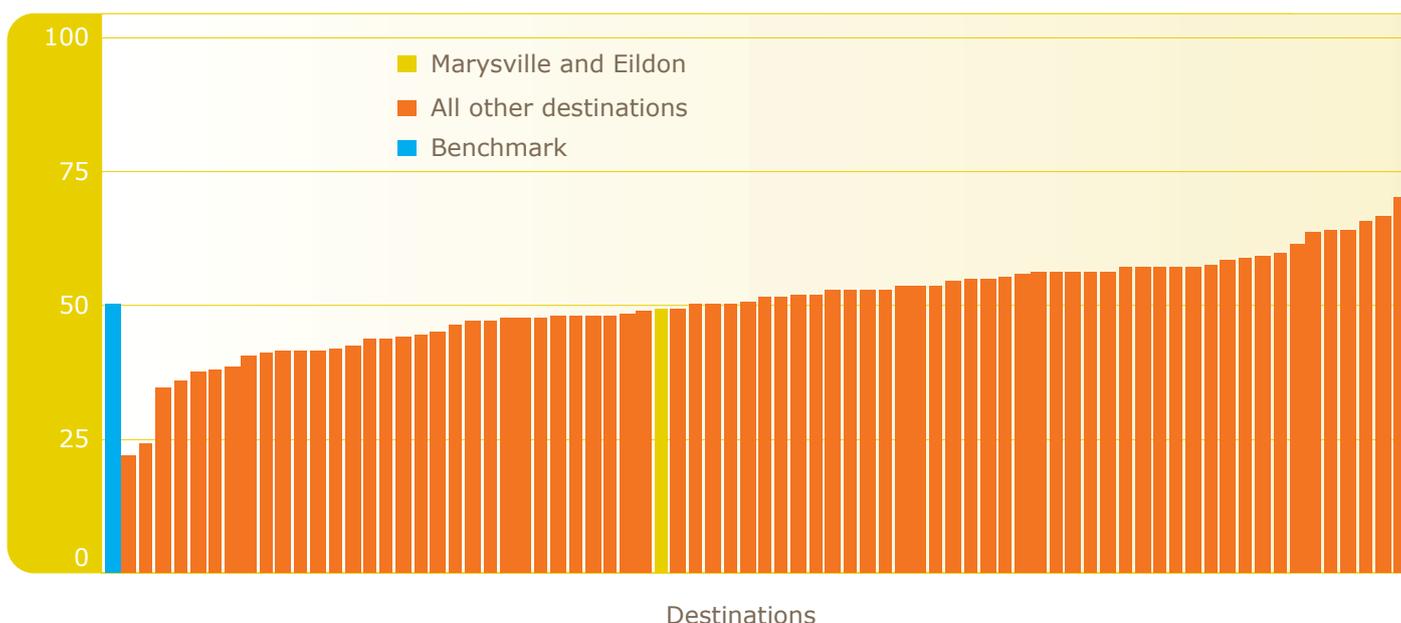
Lake Eildon was the most visited attraction (45%), followed by Steavenson Falls (36%). Day visitors were significantly more likely to visit Bruno’s Sculpture Garden and Steavenson Falls compared to overnight visitors. Overnight visitors were significantly more likely to visit Lake Eildon, Goulburn River, Lake Eildon National Park, Eildon Pondage and Eildon Trout Farm compared to day visitors.

Satisfaction with Marysville and Eildon

The figure below shows where Marysville and Eildon ranks in overall satisfaction compared to all other VPS destinations. Nearly half of visitors were very satisfied with their visit to Marysville and Eildon (49%), two points below the VPS benchmark and six points below the subgroup benchmark.

When comparing day and overnight visitors, overnight visitors were more satisfied with their visit (56% very satisfied) compared to day visitors (40%). Overall, satisfaction was higher for older non-working visitors (65%), followed by those travelling as a couple (55%). Visitors travelling alone (20% very satisfied), those visiting friends and relatives (38%) and older working visitors (40%) were less likely than the benchmark to be very satisfied with their trip.

Overall satisfaction: Proportion of visitors who were ‘very satisfied’



When comparing NET² satisfaction between VPS destinations, the result for Marysville and Eildon is similar to the VPS benchmark, with 87% of visitors satisfied with their visit to Marysville and Eildon.

There were four main drivers of overall satisfaction:

- local atmosphere in Marysville and Eildon (90% NET satisfied; 55% very satisfied)
- attractions (75% NET satisfied; 39% very satisfied)
- commercial accommodation (42% NET satisfied; 20% very satisfied)
- shopping (55% NET satisfied; 19% very satisfied).

With the exception of the local atmosphere in Marysville and Eildon, the drivers of overall satisfaction were below the VPS benchmarks therefore driving down the overall visitor satisfaction in Marysville and Eildon (49% very satisfied).

Satisfaction with *personal safety and security* (60% very satisfied) and *friendliness of locals* (59%) were above the VPS benchmark. However, *food and beverage* (9% dissatisfied), *public toilets* (11%) and *entertainment/nightlife* (9%) were above the benchmark for dissatisfied visitors.

Friendliness of locals (30% very important), local atmosphere (29%) and *roads* (28%) were most important to visitors.

Expectations of visitors

When rated against their expectations, none of the experiences expected in Marysville and Eildon were better than the VPS benchmark, and for 13% of visitors *food and wine experiences* were worse than the benchmark. While overnight visitors did not rate any experiences as better than expected, day visitors rated *nature-based experiences* and *something the kids would enjoy* as better than expected.

When comparing importance of attributes with visitors' satisfaction with those attributes, the *friendliness of locals* and *local atmosphere* were two that performed well for Marysville and Eildon. *Roads* and *food and beverage* were two areas identified as needing improvement, particularly *road signs* and *quality dining options*.

A similar pattern occurred for overnight visitors, while day visitors identified more areas for improvement, including *public toilets* and *attractions*.

Although there are clear areas for improvement, 60% of visitors were very likely to recommend Marysville and Eildon to other people as a destination to visit. This was higher than the subgroup (7 points higher) and VPS (8 points higher) benchmarks.

There was also strong intention to return with nearly half of visitors to Marysville and Eildon (48%) likely to return in 12 months, and only 9% very unlikely to return (lower than both the subgroup and VPS benchmarks). Results were similar for visitation in the next three years.

Recommendations

With the overall satisfaction score being slightly lower than the VPS benchmark, there is scope to improve offerings in Marysville and Eildon. While visitors were satisfied with the *local atmosphere*, *attractions* and *variety of things to see and do*, the local industry should consider improving accessibility to the region through better signage as well as improved shopping, food and beverage and nightlife offerings. This will enable the region to remain competitive, particularly in the domestic market.

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 Marysville and Eildon is the variety of nature experiences (including water sports) available in a scenic location, just a short drive from Melbourne. While visitors were happy with the *variety of things to see and do*, some visitors to the region (such as those travelling to visit friends and relatives, and older working visitors) were less satisfied than the benchmark. This indicates that there are areas the industry should focus on to ensure that repeat visitors (78% of all visitors to the region) continue to return to the region. *Signage*, *food and beverage*, *shopping* and *entertainment/nightlife* are some areas where there is room for improvement.

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

2. Improving product and service delivery

- The internet is a key source for information and bookings before visitors' trips. While www.marysvilletourism.com and www.visitvictoria.com were considered two of the most useful websites, 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 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; and the natural or urban environment. This was particularly evident for infrastructure, services and amenities in Marysville and Eildon with *food and beverage* (9% dissatisfied), *public toilets* (11%) and *entertainment/nightlife* (9%) rated above the benchmark for dissatisfied visitors.

3. Product development and diversification

- *Spending quality time with others, nature-based experiences and touring around and exploring* were among many experiences expected by visitors to Marysville and Eildon. However, none of the experiences visitors expected were rated better than the benchmark and *food and wine experiences* were worse than the benchmark. Future tourism development should address these issues while remaining 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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Courtesy of Tourism Victoria/Mansfield Shire

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