

Bendigo Visitor Profile and Satisfaction Survey



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



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Background



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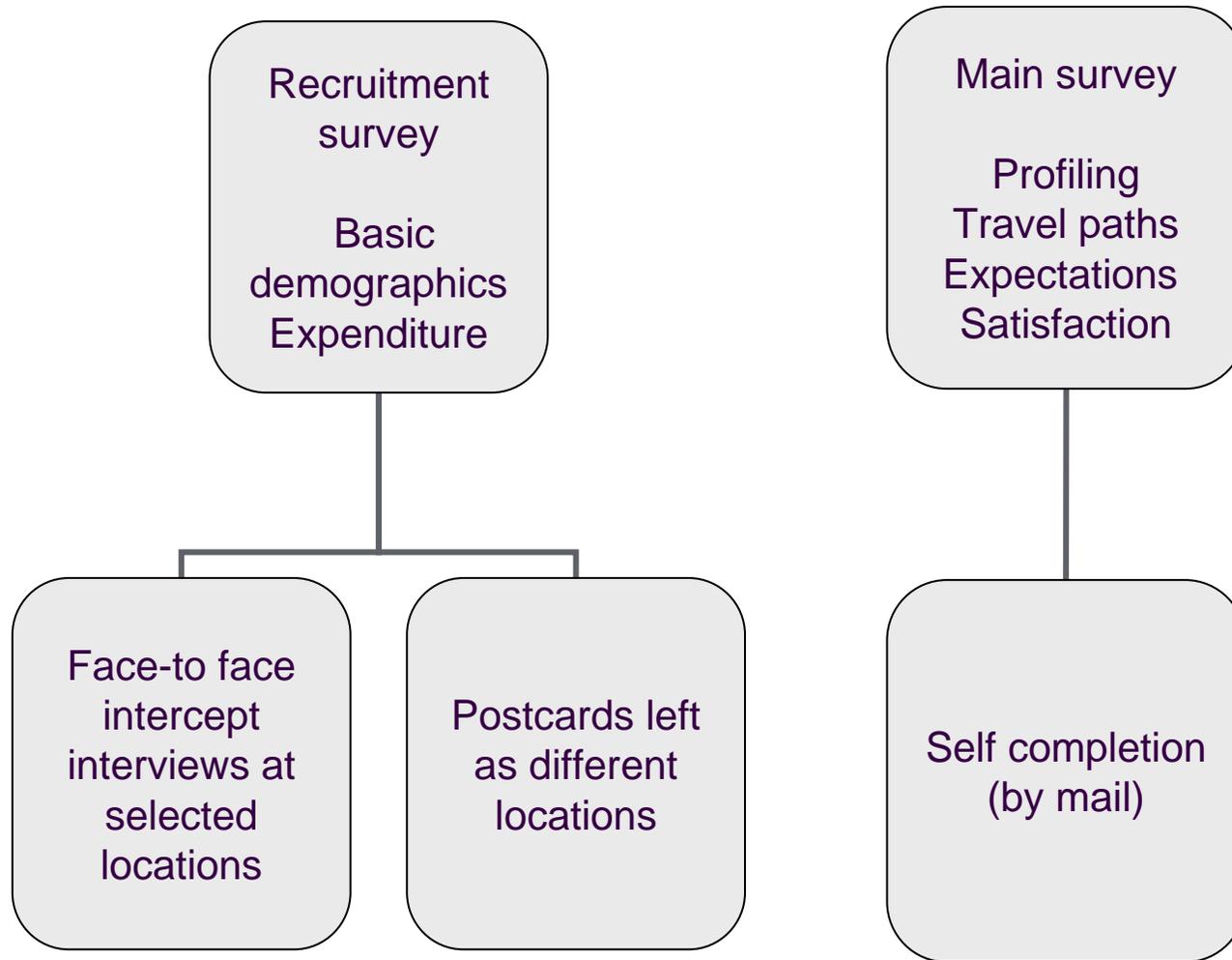


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Bendigo VPS project

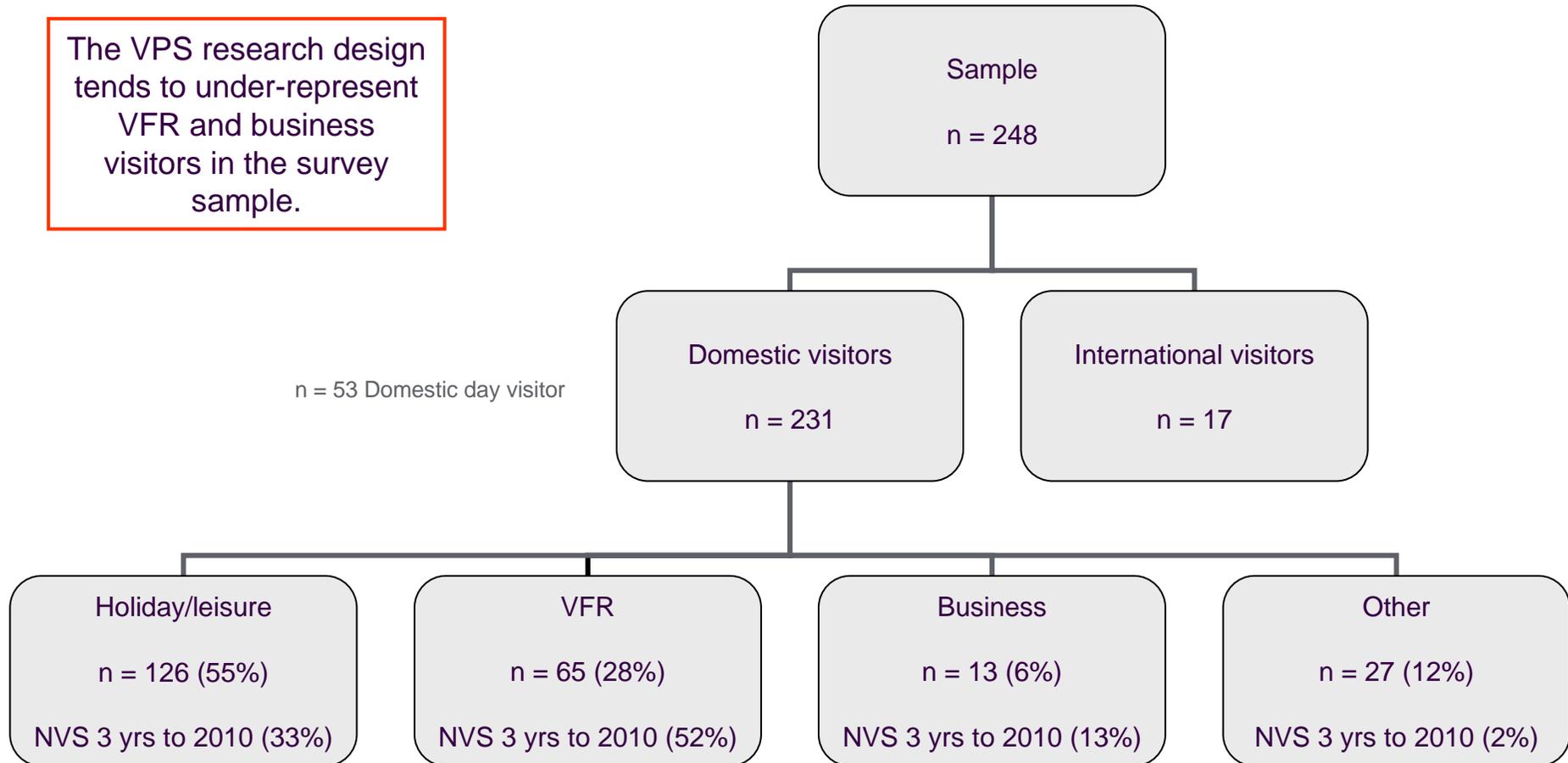
- Bendigo Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (part of the Department of Resources Energy and Tourism).
- Respondents were recruited during their visit to the region in March and April 2011.
- A VPS survey was run in Ballarat concurrently with Bendigo. A full report for Ballarat is also available as well as a combined Goldfields report which combines the two samples.

Data collection



Survey sample

The VPS research design tends to under-represent VFR and business visitors in the survey sample.



VPS Benchmarks

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. Only the most recent waves for each destination are included.

Comparisons against VPS benchmarks are made throughout this report. Bendigo Benchmark Summary is available in conjunction with this report. This summary provides a full set of comparisons for Bendigo results against the benchmarks.

A VPS survey was completed in Bendigo in April 2007. Comparisons with this earlier wave are also made throughout the report.

VPS Benchmarks

Additionally some data are compared with a 'subgroup' of destinations that have similar attributes to Bendigo region. The 'subgroup' includes:

- Albury Wodonga
- Ballarat
- Daylesford Macedon Ranges
- Echuca
- Gippsland
- Grampians
- High Country
- Mildura
- Murrindindi
- Swan Hill

Bendigo data are included in the benchmark.

More detail on the Benchmark Summary is provided in the Appendix.

Visitor and trip characteristics



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Visitor profile (during the survey period)

- Trip purpose
- Age
- Life stage
- Travel party
- Origin

Visitors travelled to Bendigo for a holiday or to visit friends and relatives



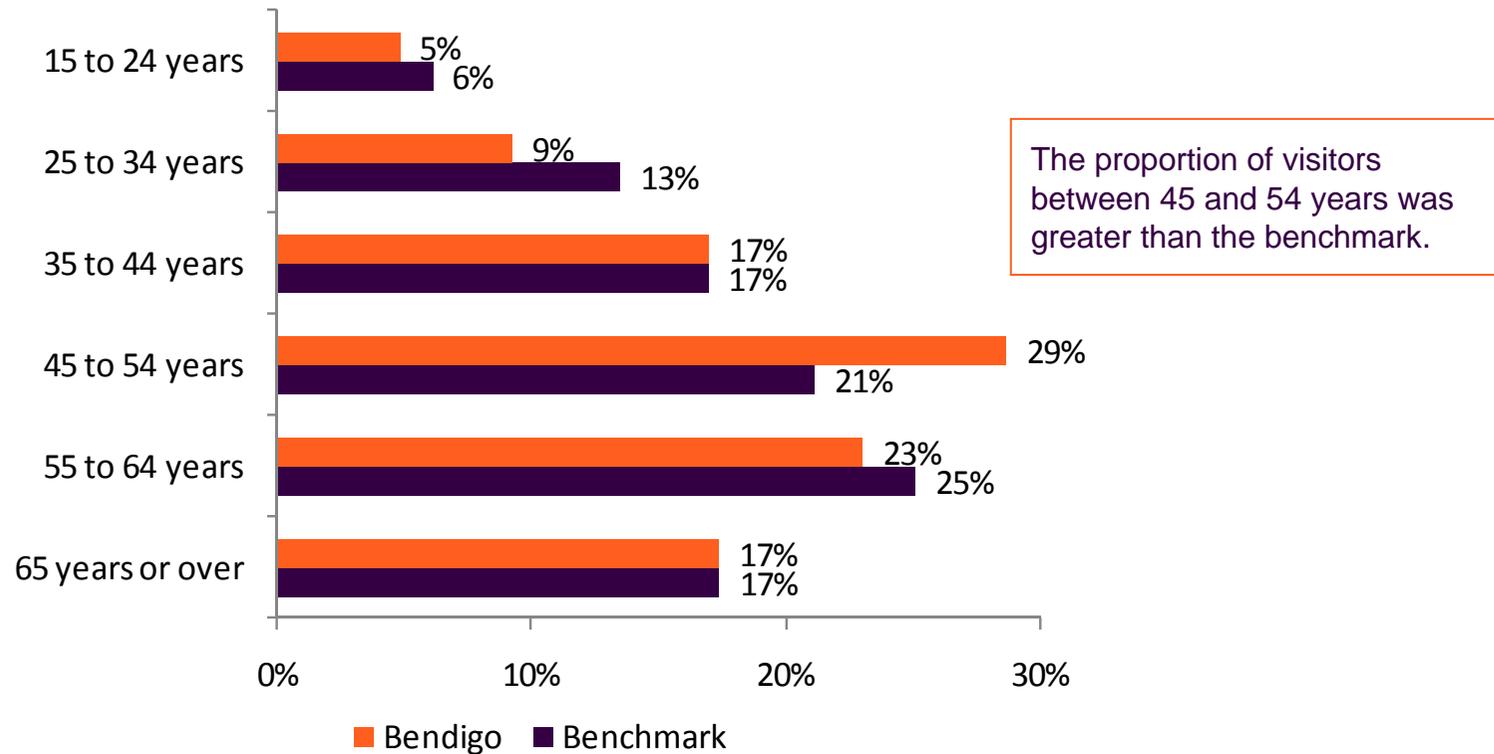
- The proportion who travelled to visit friends and relatives was greater than the benchmarks.
- 71% of VFR visitors would not have visited Bendigo if their friends and/or relatives were not there.

Purpose	Bend	Subgroup	All
Holiday	55%	↓ -20%	↓ -22%
Visiting friends and relatives	28%	↑ 15%	↑ 15%
Business	5%	→ 0%	→ 1%
Other	11%	↑ 4%	↑ 6%

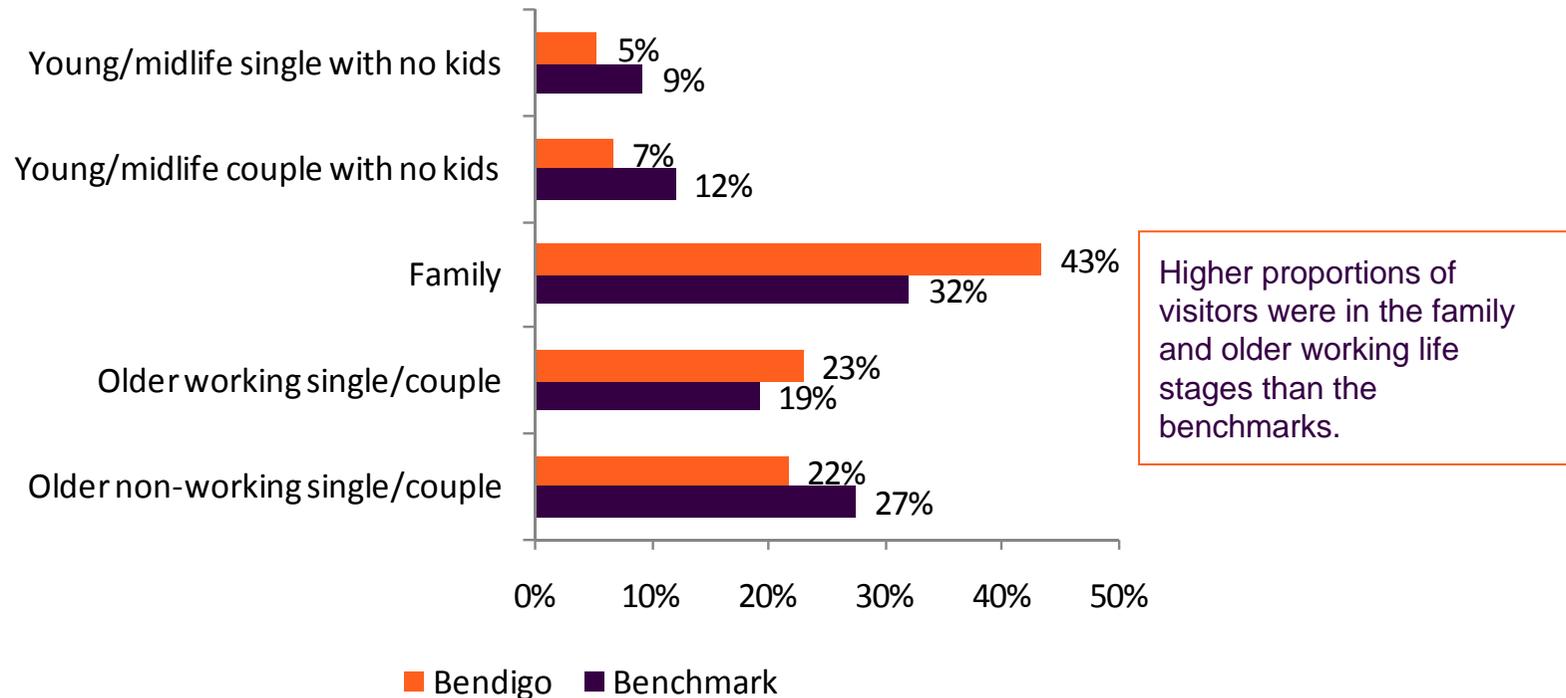
Base =248

'What was the main purpose of the trip?'

The majority of visitors were between 45 and 64 years and 64 years

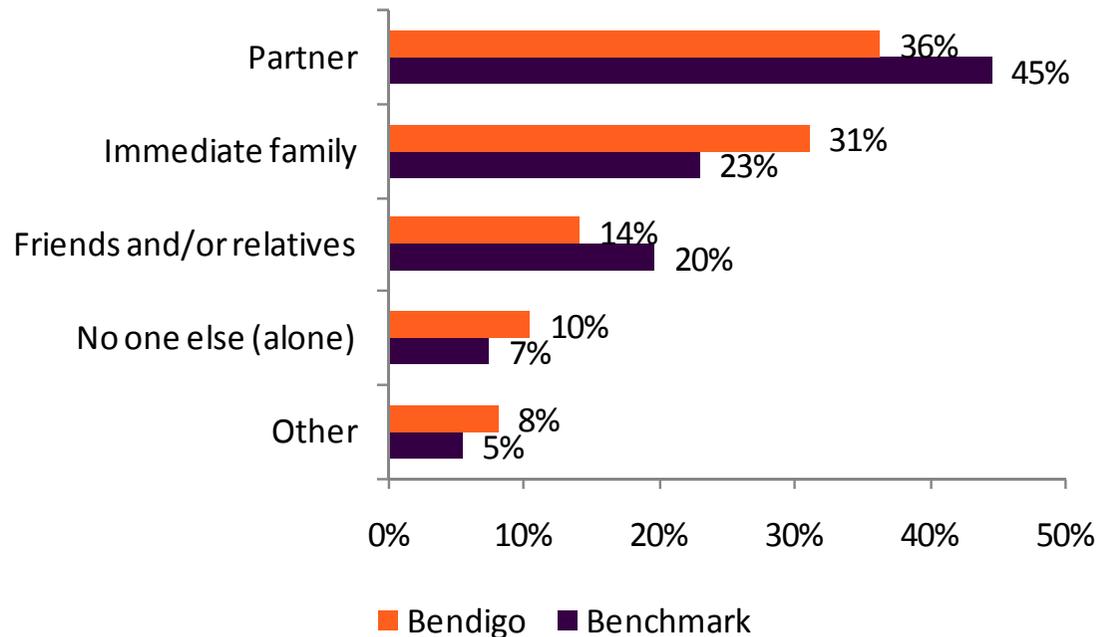


The majority of visitors were in the family and older life stages



Life Stage	Bend	Subgroup	All
Young/midlife single	5%	→ 0%	↓ -4%
Young/midlife couple	7%	↓ -4%	↓ -5%
Family	43%	↑ 8%	↑ 11%
Older working	23%	→ 3%	↑ 4%
Older not working	22%	↓ -7%	↓ -6%

Visitors travelled with their partner or immediate family



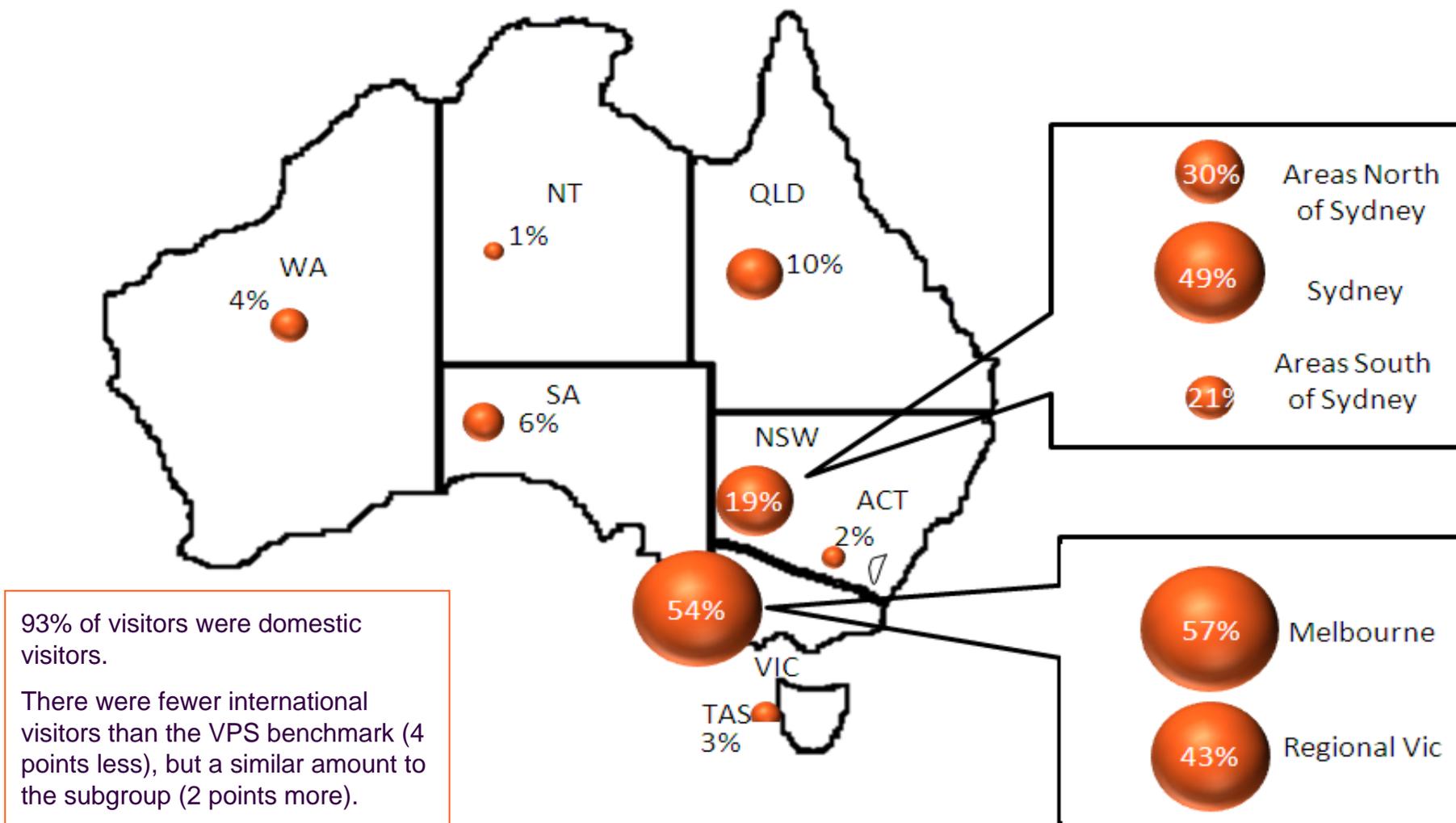
A higher proportion travelled with their family or alone compared with the benchmarks.

Travel Party	Bend	Subgroup	All
Alone	10%	↑ 5%	→ 3%
Couple	36%	↓ -10%	↓ -8%
Family	31%	↑ 7%	↑ 8%
Friends or relatives	14%	↓ -5%	↓ -6%
Other	8%	→ 3%	→ 3%

Base =248

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

More than half of the domestic visitors were from Victoria



93% of visitors were domestic visitors.
 There were fewer international visitors than the VPS benchmark (4 points less), but a similar amount to the subgroup (2 points more).

The majority of visitors in Regional Vic were from the Great Ocean Road region.

"In which State or Territory do you reside?"
"What is your home postcode"

Base =231

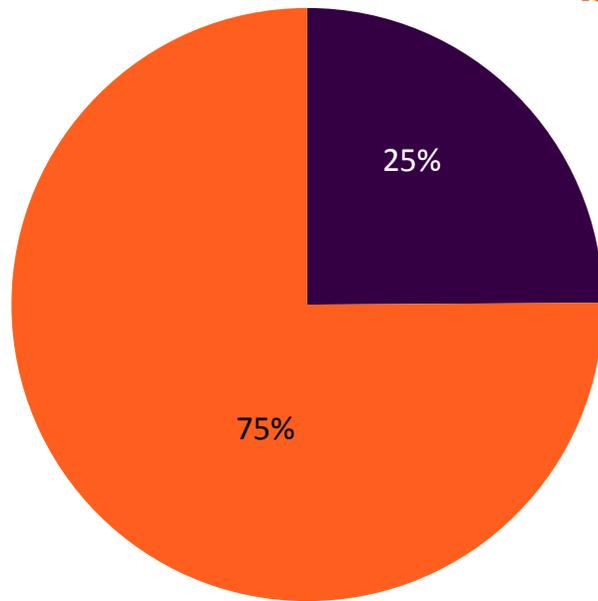
Summary

- Just over half of visitors (55%) travelled to the region for holiday/leisure purpose, with 28% also travelling to visit friends and relatives (VFR). The proportion of VFR visitors was above the benchmarks.
- The majority of VFR visitors (71%) would not have visited the region if their friends and/or relatives were not there
- The majority of visitors (52%) were aged between 45 and 64 years. The proportion between 45 and 54 years was higher than the VPS benchmarks.
- The majority of visitors were in the family (43%) and older life stages (23% older working and 22% older non-working). The proportions in the family and older working life stages were above the benchmarks.
- The highest proportion of visitors travelled as a couple, but 31% also travelled with their immediate family.
- More than nine in ten visitors (93%) were domestic visitors.
- More than half of domestic visitors (54%) were from Victoria. Of Victorians, 57% were from Melbourne.

Trip planning and booking

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

Three quarters of visitors were repeat visitors, a higher proportion than the VPS benchmark

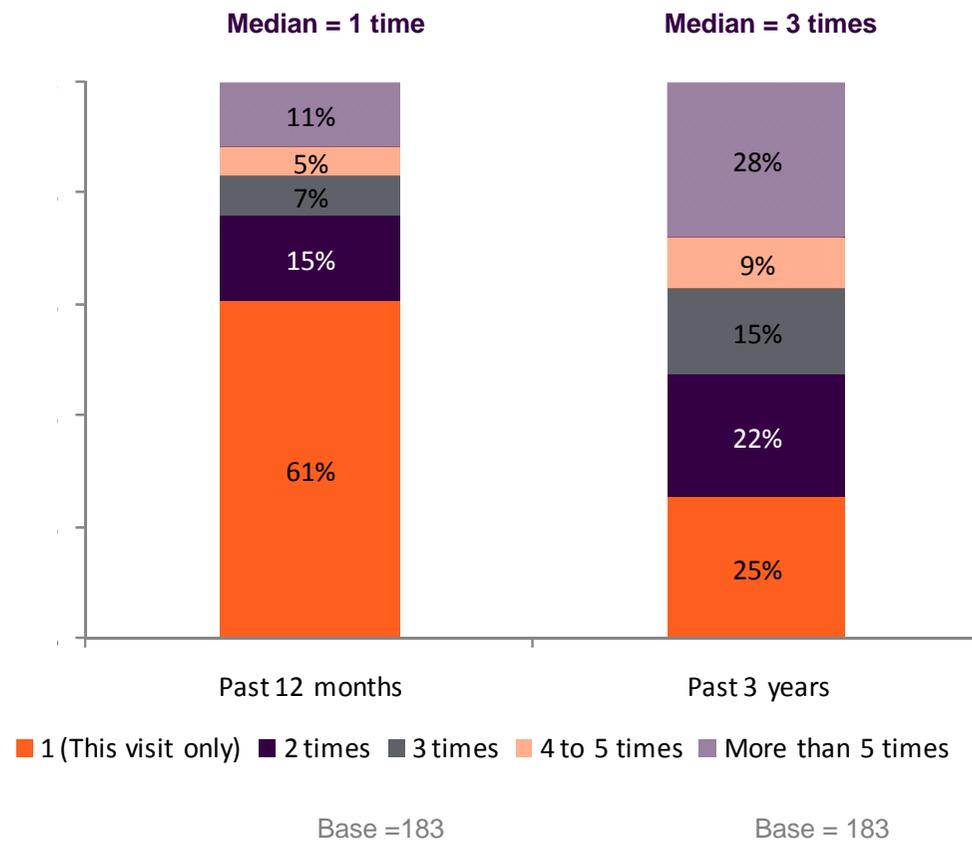


Base = 245

- First (Benchmark = 32%)
- Return (Benchmark = 68%)

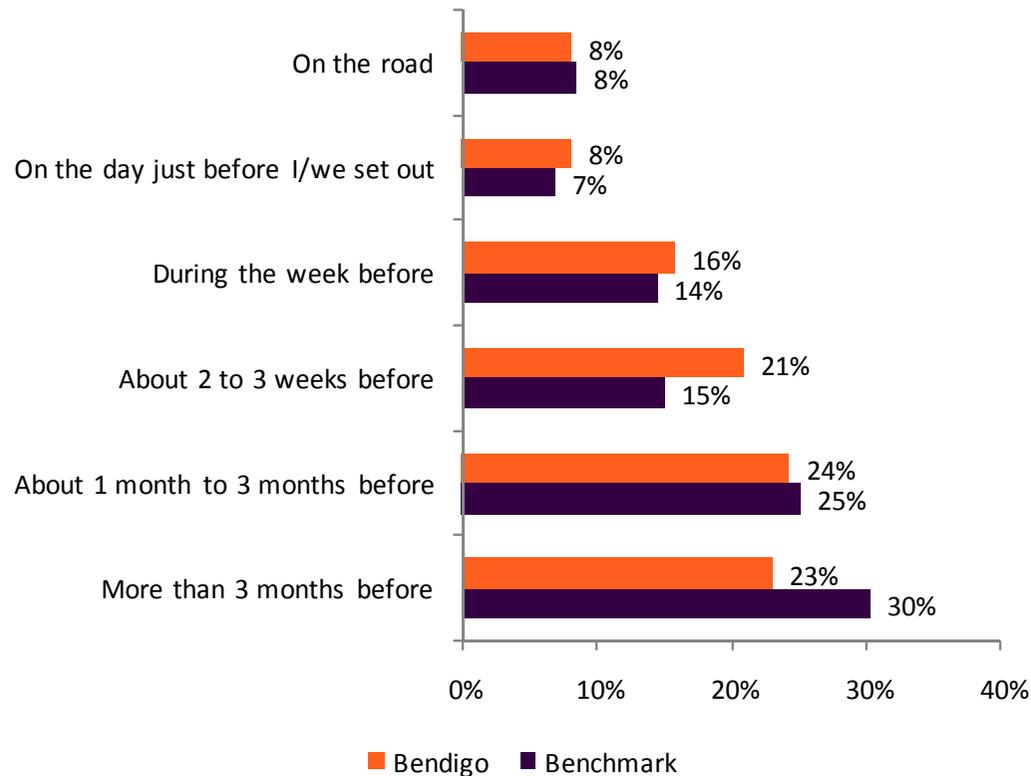
- The proportion of repeat visitors is similar to the subgroup benchmark (76%).
- 87% of VFR visitors were repeat visitors compared with 68% for holiday/leisure visitors.

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



“How many times have you visited Bendigo, including both day trips and overnight trips ”

The planning period for visitors was generally shorter compared with the VPS benchmark

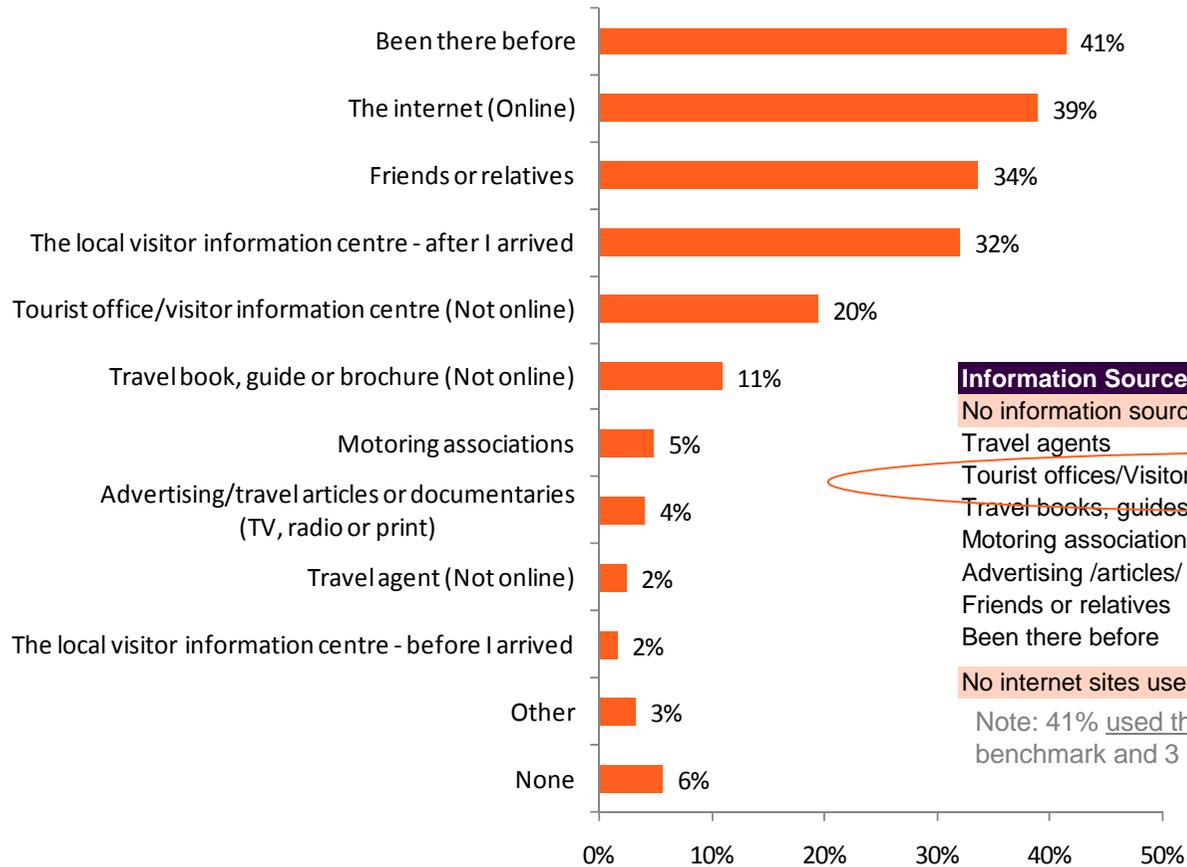


Trip Planning	Bend	Subgroup	All
On the road	8%	→ 1%	→ 0%
In the month before	45%	→ 2%	↑ 8%
1 to 3 months	24%	→ -1%	→ -1%
More than 3 months	23%	→ -1%	↓ -7%

The planning period pattern was similar to the subgroup benchmarks.

“When was the decision made to visit Bendigo?”

Previous visits and the internet were the main sources of information

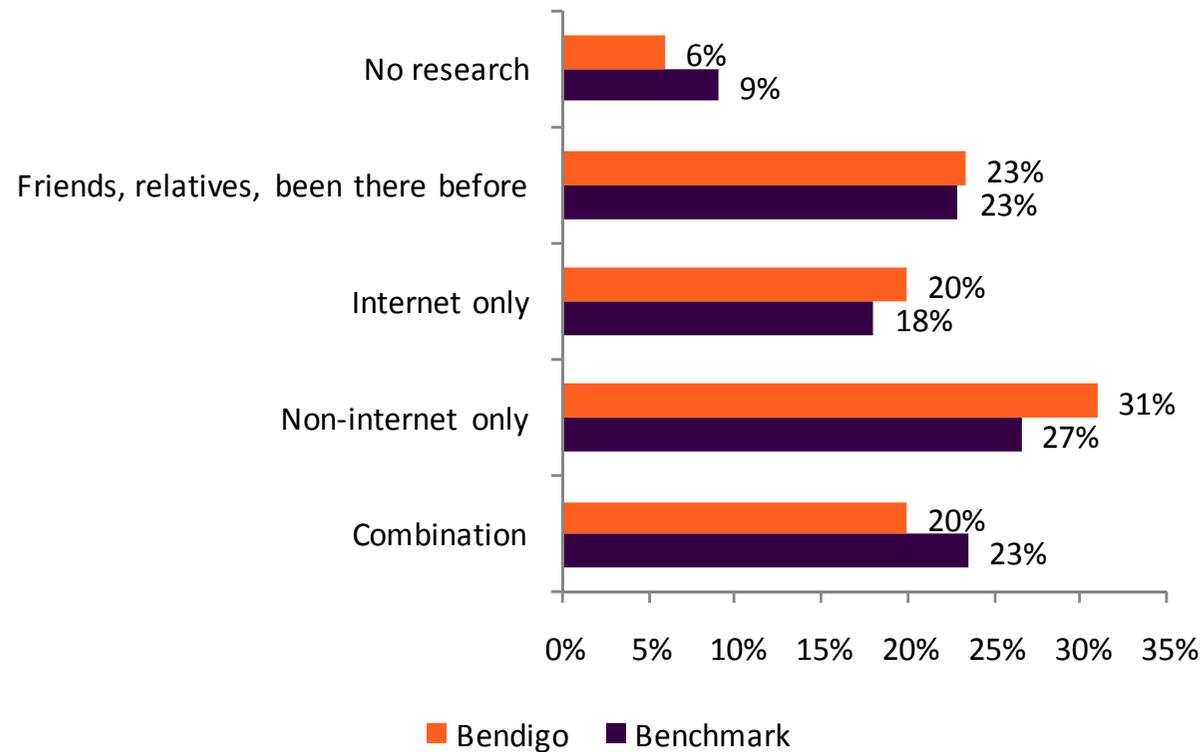


The proportion who used the Visitor Information Centres was above the subgroup and all destination benchmarks.

Information Sources - Non internet	Bend	Subgroup	All
No information sources used	6%	↓ -4%	→ -3%
Travel agents	2%	→ 1%	↓ -4%
Tourist offices/Visitor Information Centres	39%	↑ 21%	↑ 20%
Travel books, guides or brochures	11%	↓ 6%	↓ -17%
Motoring associations	5%	→ -3%	↓ -5%
Advertising /articles/ documentaries	4%	→ -1%	↓ -5%
Friends or relatives	34%	↑ 10%	→ 3%
Been there before	41%	→ 0%	→ 3%
No internet sites used	61%	→ 2%	→ 1%

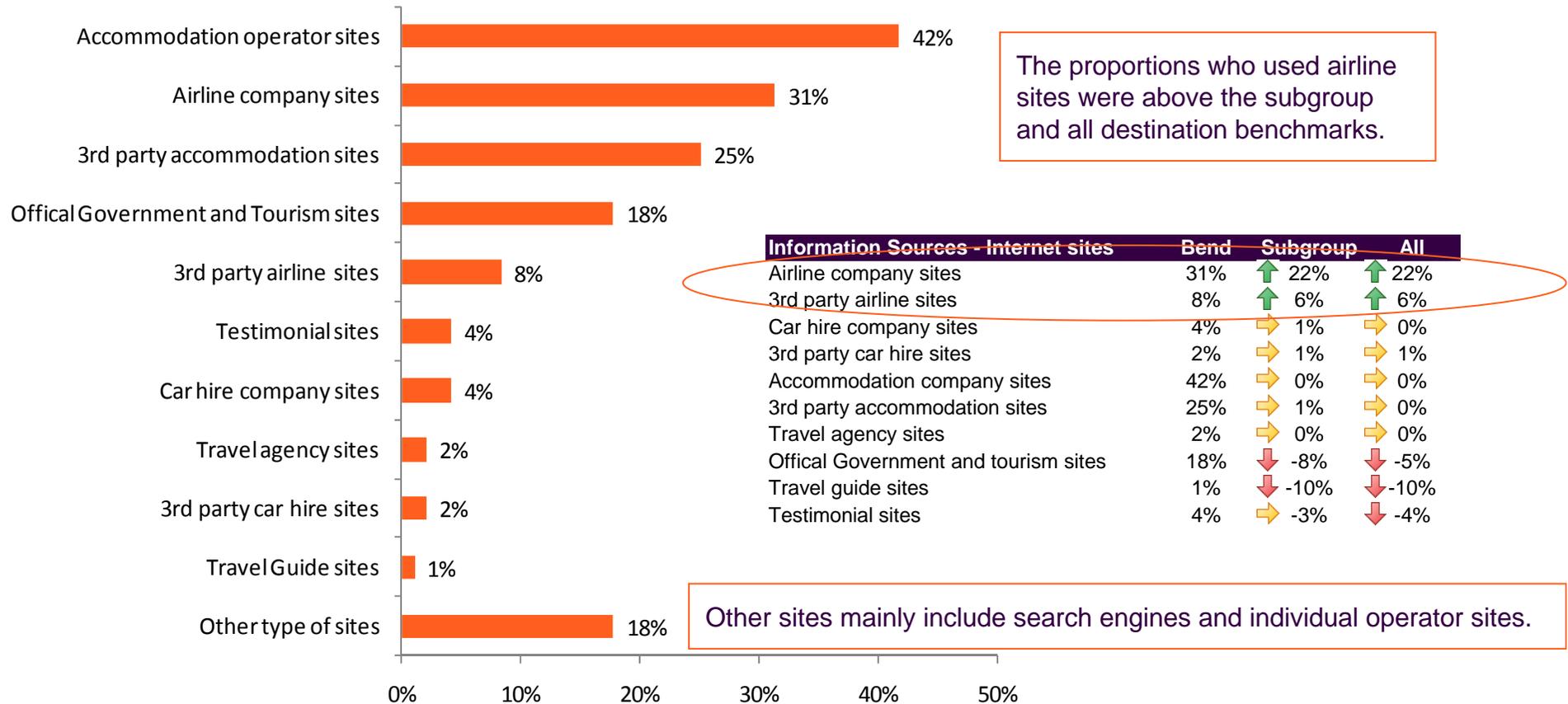
Note: 41% used the internet which is similar to the sub group benchmark and 3 points above the VPS benchmark.

The highest proportion of visitors used non-internet sources only



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

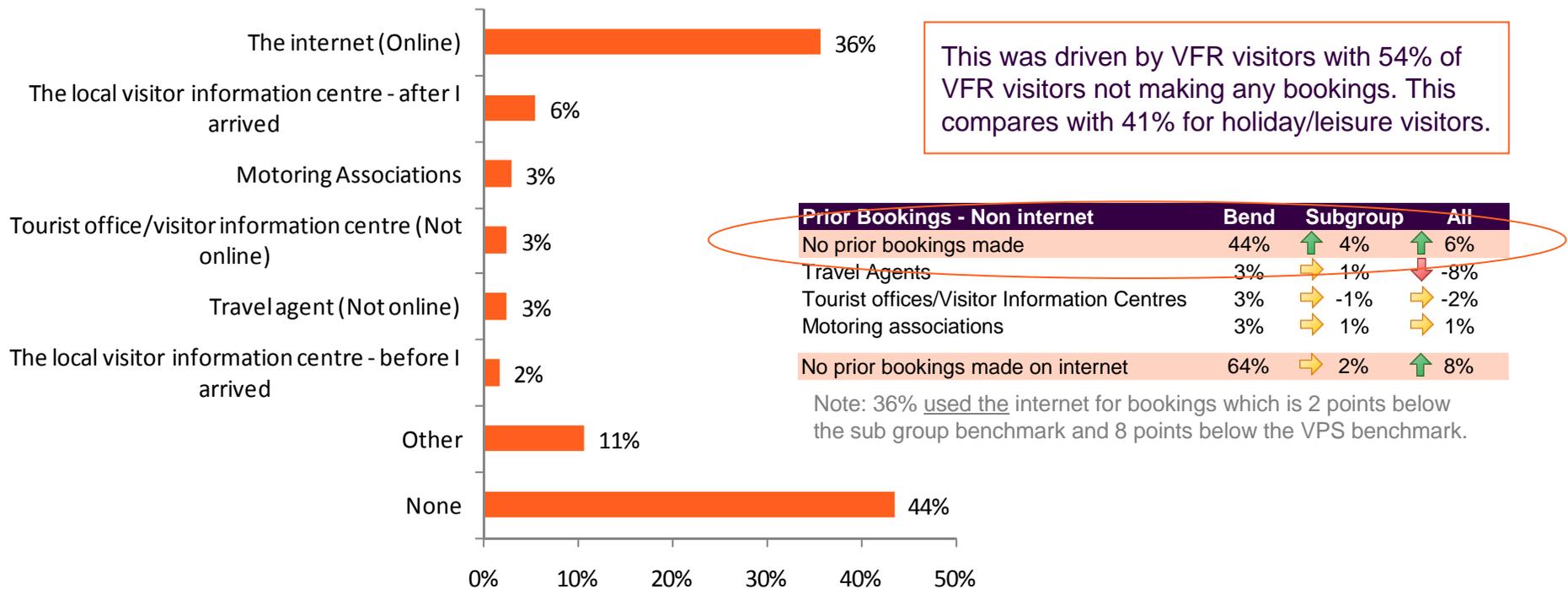
Accommodation operator sites were the most popular sites for information



Base = 96

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

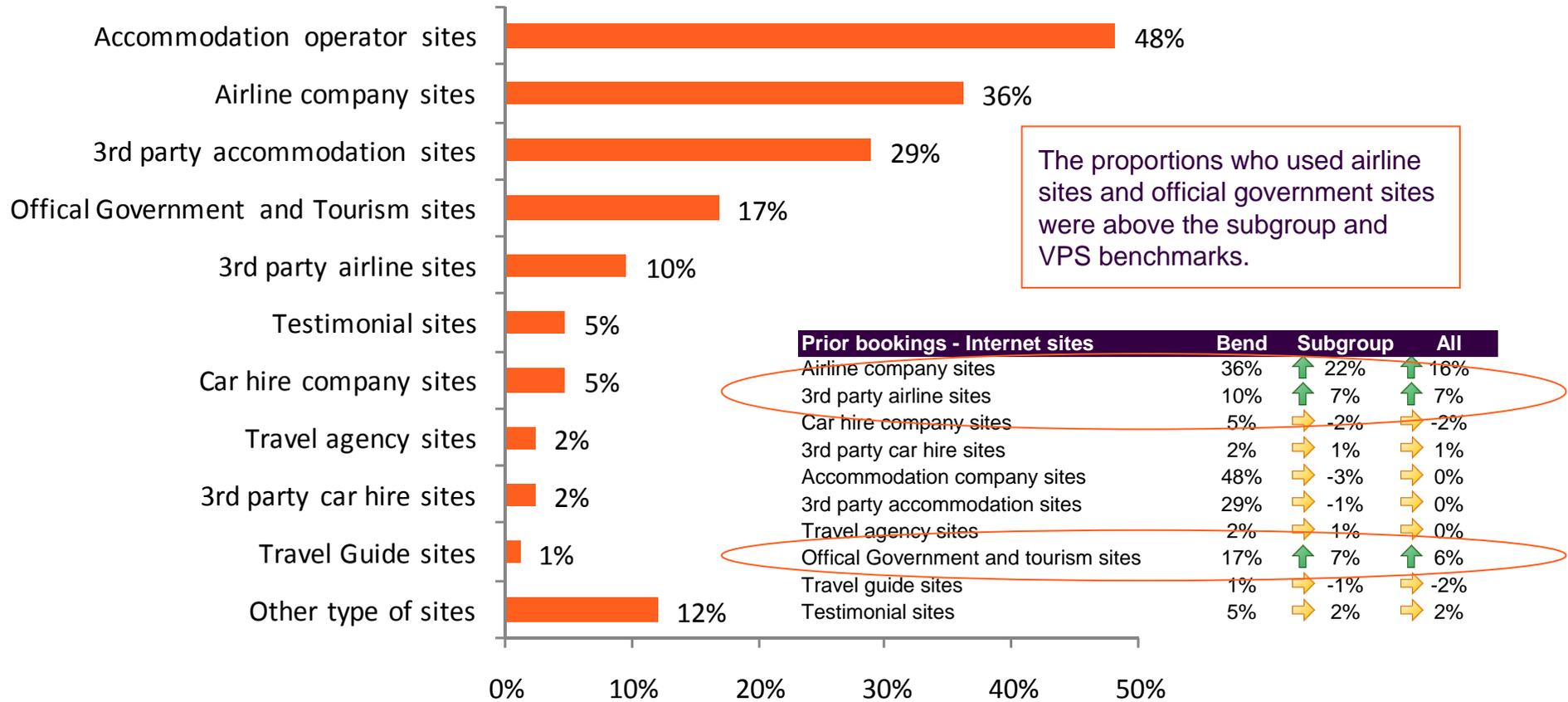
The highest proportion of visitors did not make any bookings, a higher proportion than the benchmarks



This was driven by VFR visitors with 54% of VFR visitors not making any bookings. This compares with 41% for holiday/leisure visitors.

Note 'other' methods of booking mainly includes phoning the operator directly.

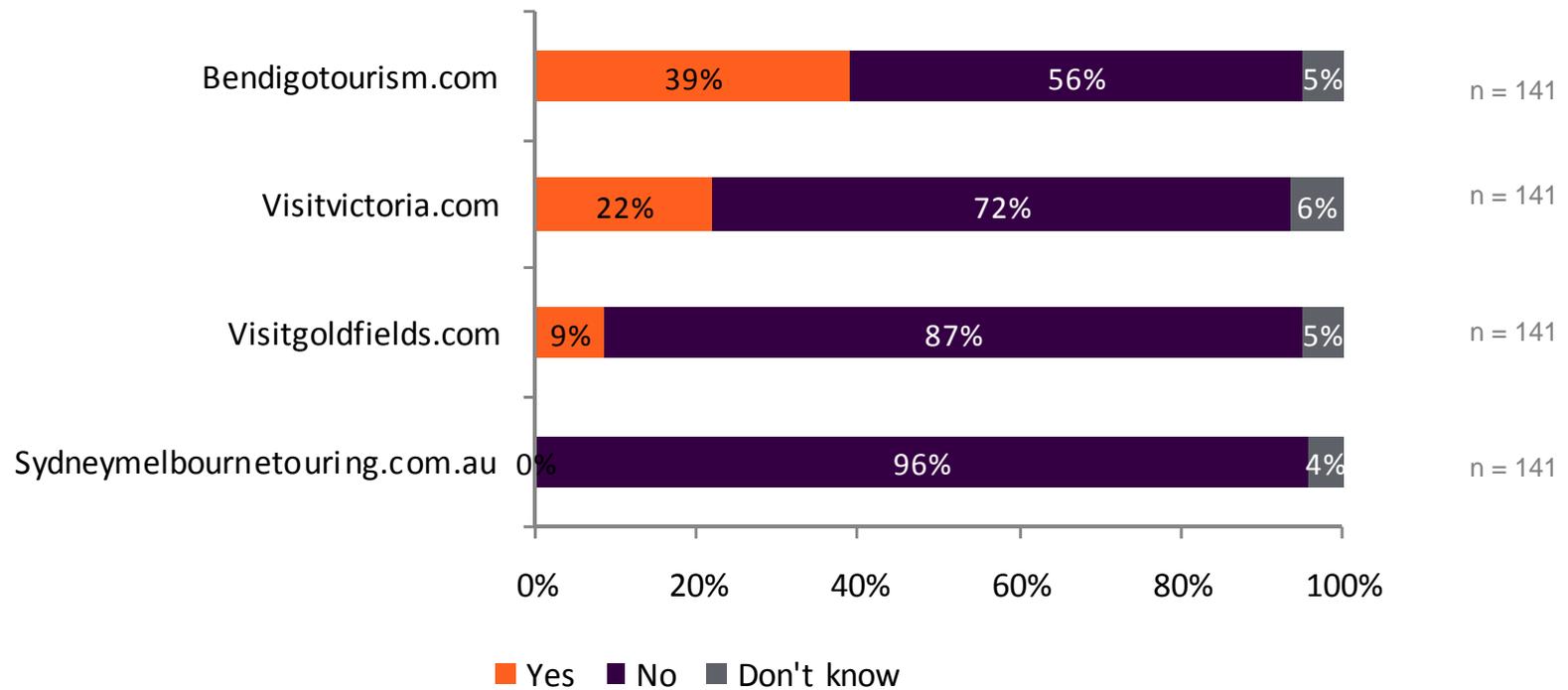
Accommodation operator sites were the most popular sites for bookings



Base = 83

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

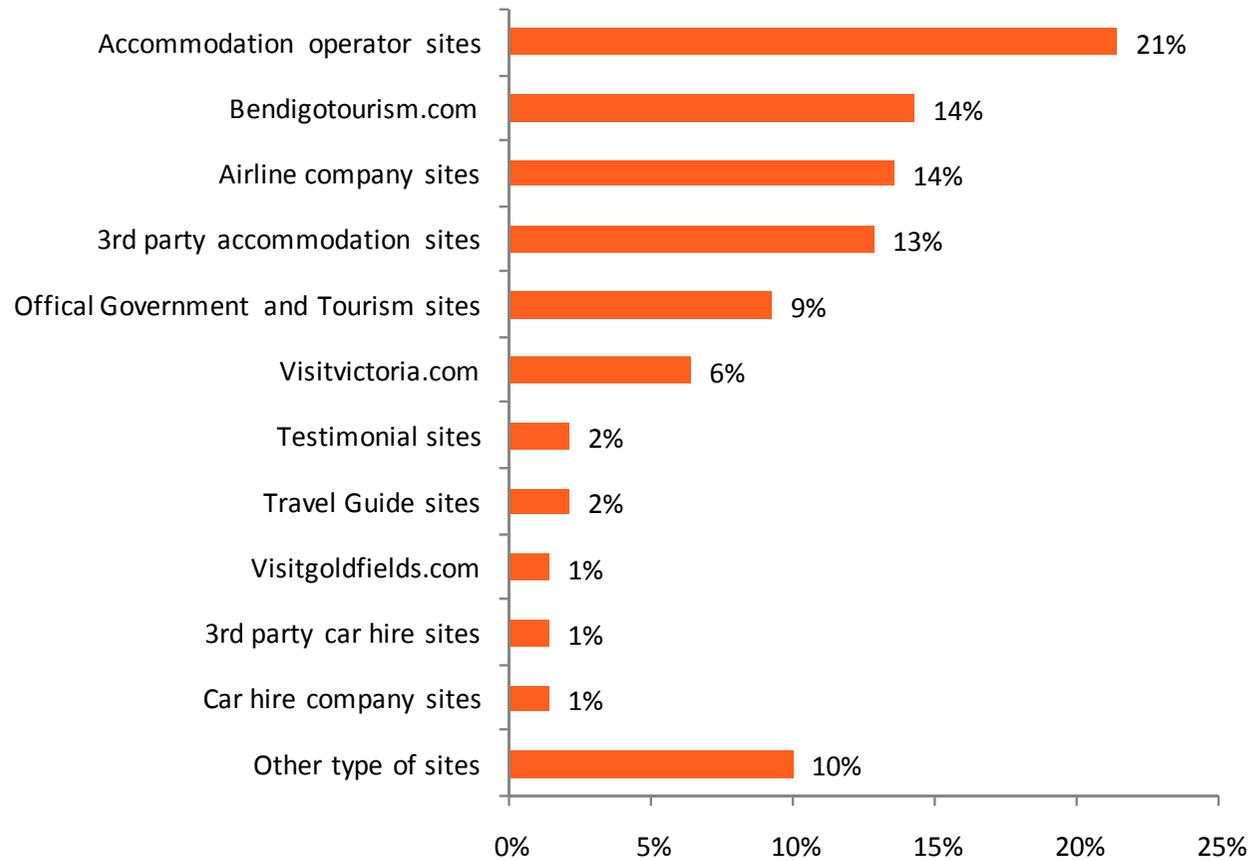
Bendigotourism.com was the most visited destination specific site



Base =141

"Did you use any of the following specific websites prior to your trip to Bendigo?"

Over a fifth of visitors thought the accommodation operator sites were the most useful sites



"Of the websites you used prior to your trip to Bendigo, which did you find most useful?"

Base =140

Summary

- Three quarter of visitors were repeat visitors – seven points above the VPS benchmark, but a similar proportion to the subgroup.
- About 45% of visitors planned their trip in the month before (excludes on the road). This is a similar proportion to the subgroup and eight points above the VPS benchmark.
- Previous visits (41%) and the internet (39%) were the main sources of information – both similar proportions to the benchmarks.
- The proportion who used the Visitor Information Centres (39%) was above the benchmarks.
- Accommodation operator sites (42%), airline operator sites (31%), third party accommodation sites (25%) and official government or tourism sites (18%) were the most common websites used for information.

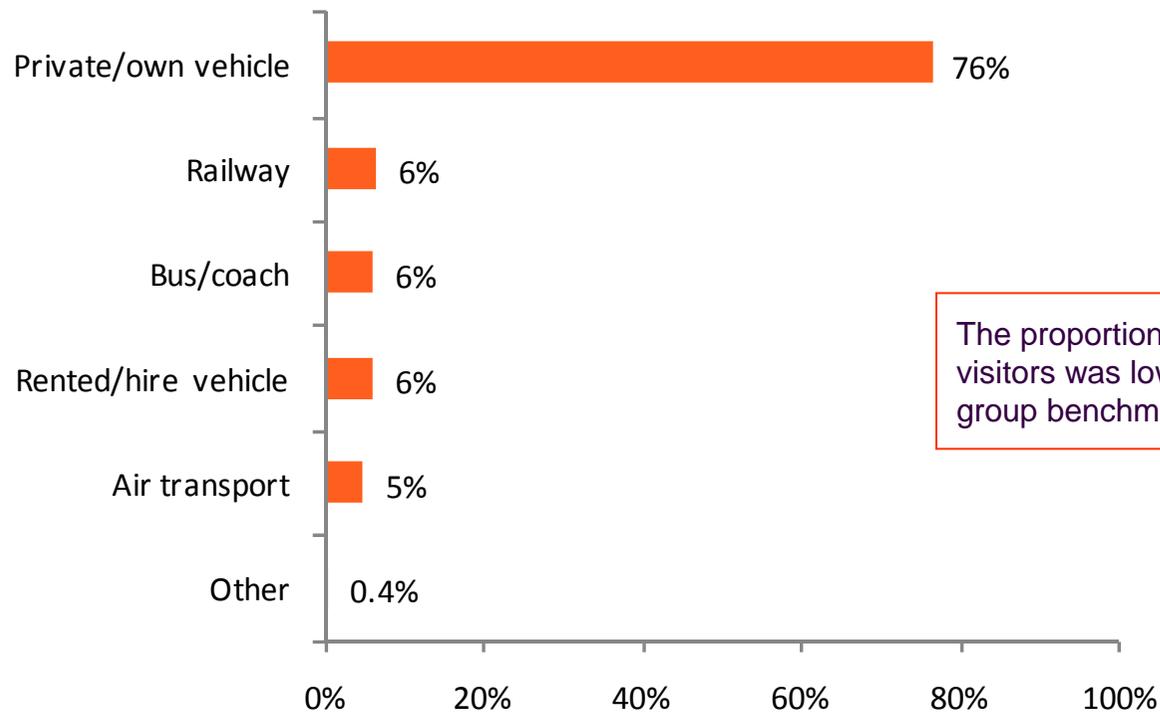
Summary

- A higher proportion of visitors (44%) did not make any bookings prior to their visit.
- Over a third of visitors (36%) used the internet to make bookings – a similar proportion to the subgroup benchmark, but eight points below the VPS benchmark.
- Accommodation operator sites (48%), airline operator sites (36%), third party accommodation sites (29%) and official government or tourism sites (17%) were also the most common websites used for booking.
- A fifth of visitors (21%) chose accommodation operator sites as the most useful website followed by Bendgotourism.com and airline sites (each 14%).

Getting to and around Bendigo

- Transport used
- Routes taken in and out
- Locations visited

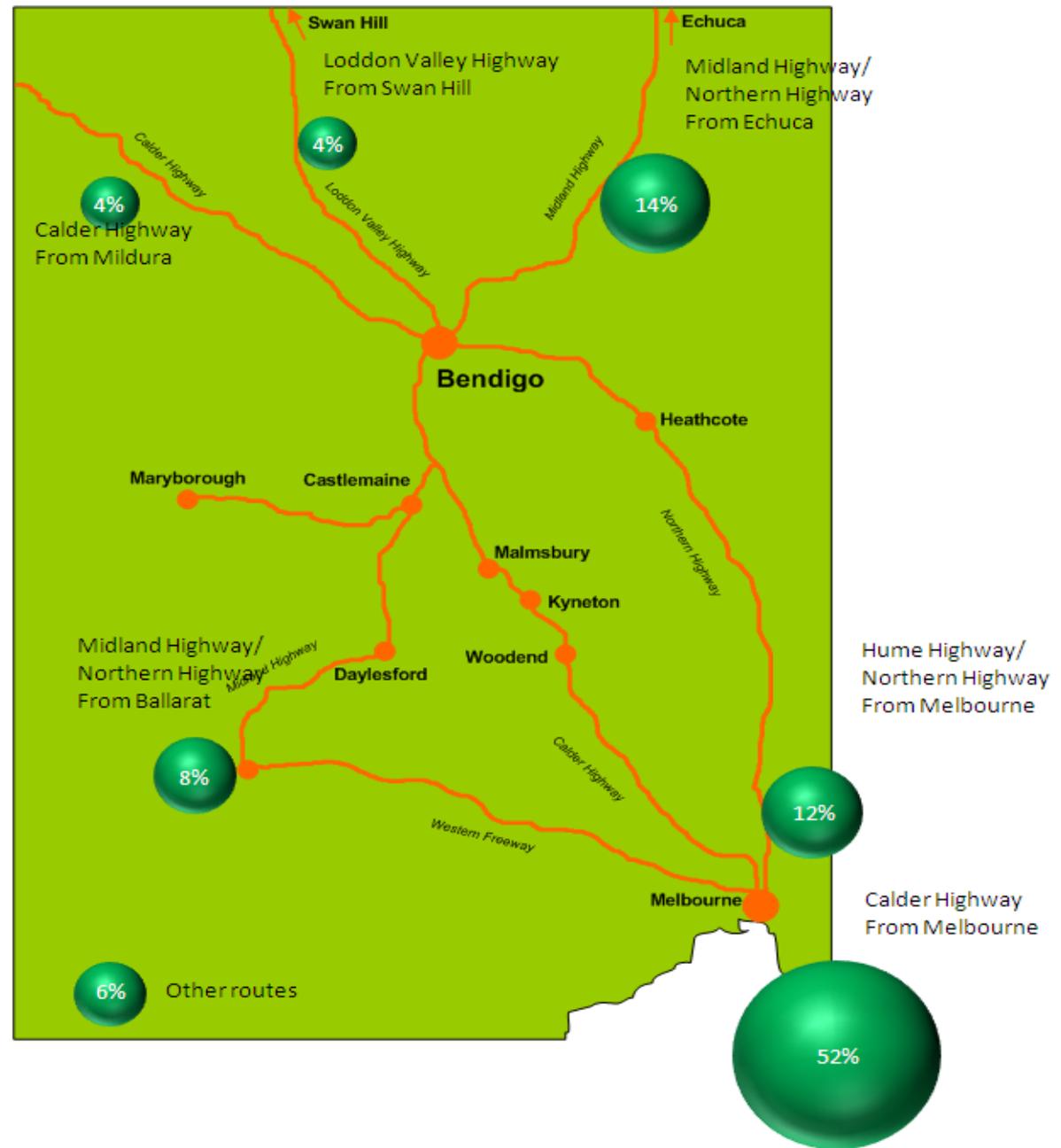
More than four in five visitors were self drive



The proportion of self drive visitors was lower than the sub group benchmark.

Other Characteristics	Bend	Subgroup	All
Self drive	82%	↓ -8%	→ 3%
Air travel	5%	→ 2%	↓ -8%

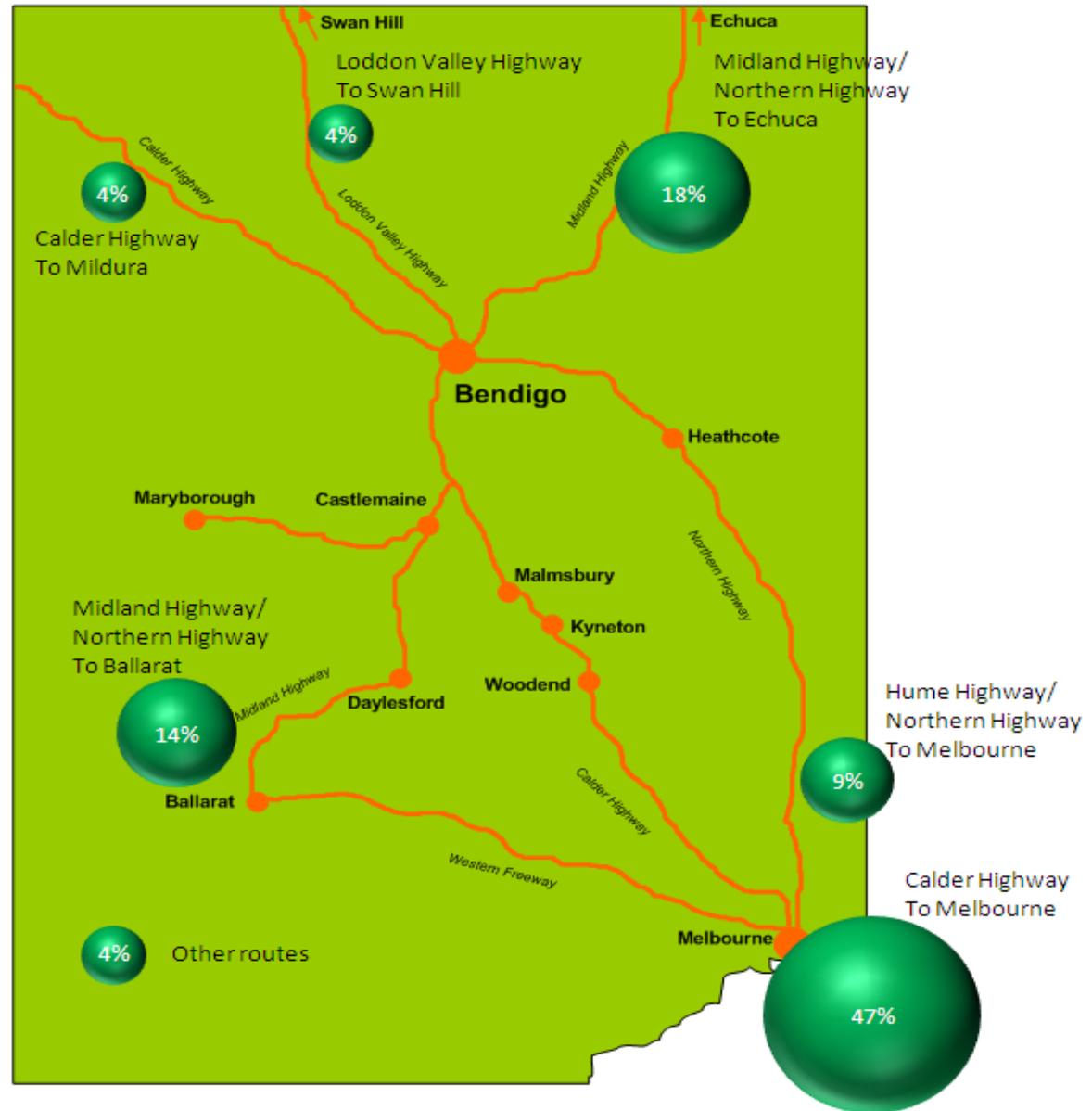
Routes used to travel to Bendigo



Base = 198

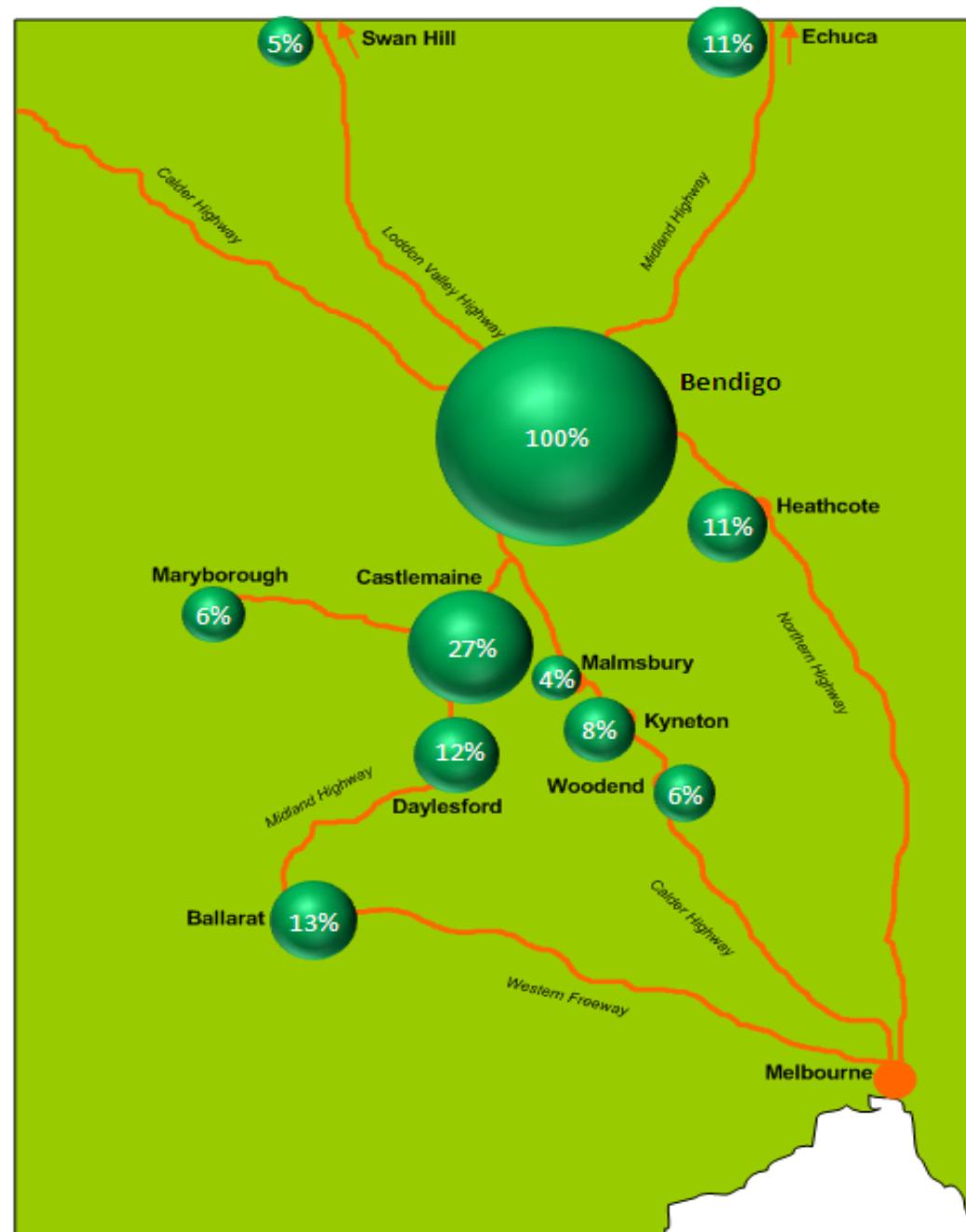
"Which route did you mainly travel to get to Bendigo?"

Routes used to leave Bendigo



Towns visited during trip – towns stopped at

- Median Stops = 2 stops
- Castlemaine was the most popular stop – 27% of visitors who stopped in Bendigo also stopped in Castlemaine.
- Of those who stopped at Castlemaine, 68% did not use the Midland Highway to/from Ballarat to enter or leave the region.



Base = 248

“On this trip which, if any, of the following towns did you visit?”

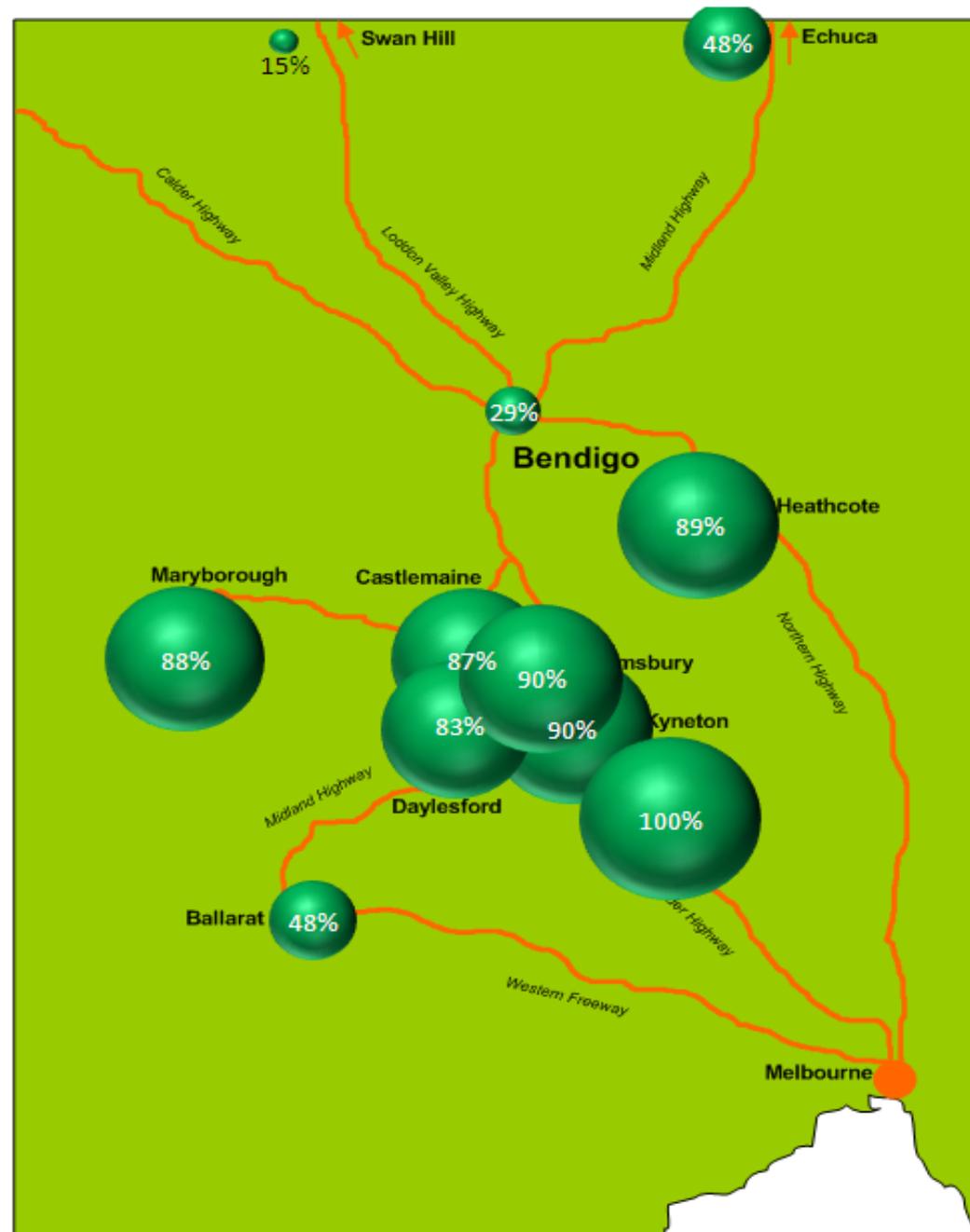
Towns visited during trip – day visit

- Median Number of Day Stops = 1 stop
- Most towns stopped at were for a day visit
- 87% of those who stopped in Castlemaine stopped for a day visit.

Percentages are expressed as the percentage of all visits (day and overnight) to each town.

Bases: Bendigo (223); Heathcote (27)*; Castlemaine (67); Maryborough (16)*; Kyneton (21)*; Woodend (16)*; Daylesford (30)*; Echuca (27)*; Swan Hill (13)*; Ballarat (31)*; Malmsbury (10)*

* Small base.



“On this trip which, if any, of the following towns did you visit?”

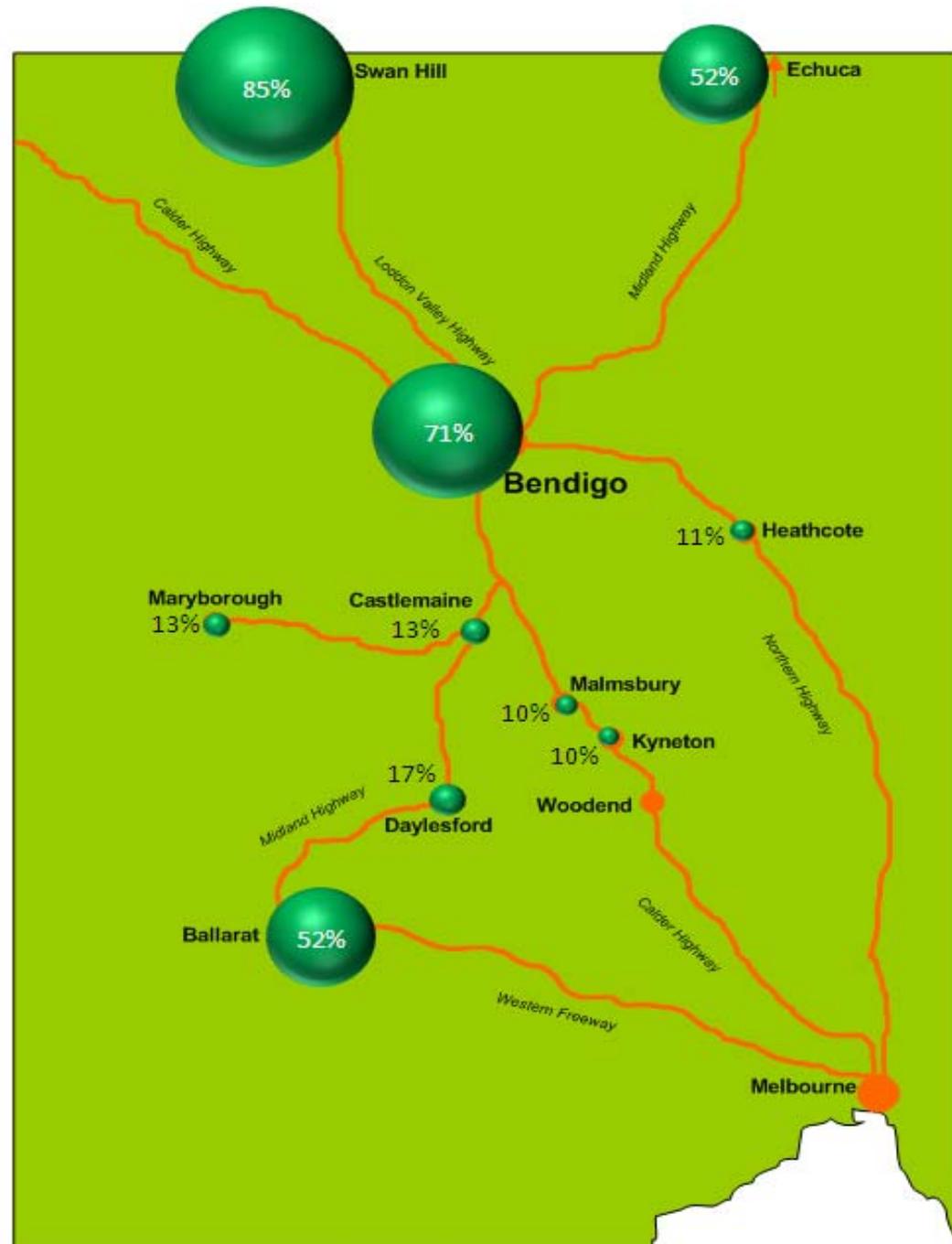
Towns visited during trip – stopped overnight

- Median Number of Overnight Stops = 1 stop
- 86% of visitors who stopped overnight only stopped overnight in one town
- The majority of visitors who stopped in Swan Hill (85%) and Ballarat (52%) stopped overnight.

Percentages are expressed as the percentage of all visits (day and overnight) to each town.

Bases: Bendigo (223); Heathcote (27)*; Castlemaine (67); Maryborough (16)*; Kyneton (21)*; Woodend (16)*; Daylesford (30)*; Echuca (27)*; Swan Hill (13)*; Ballarat (31)*; Malmesbury (10)*

* Small base.



“On this trip which, if any, of the following towns did you visit?”

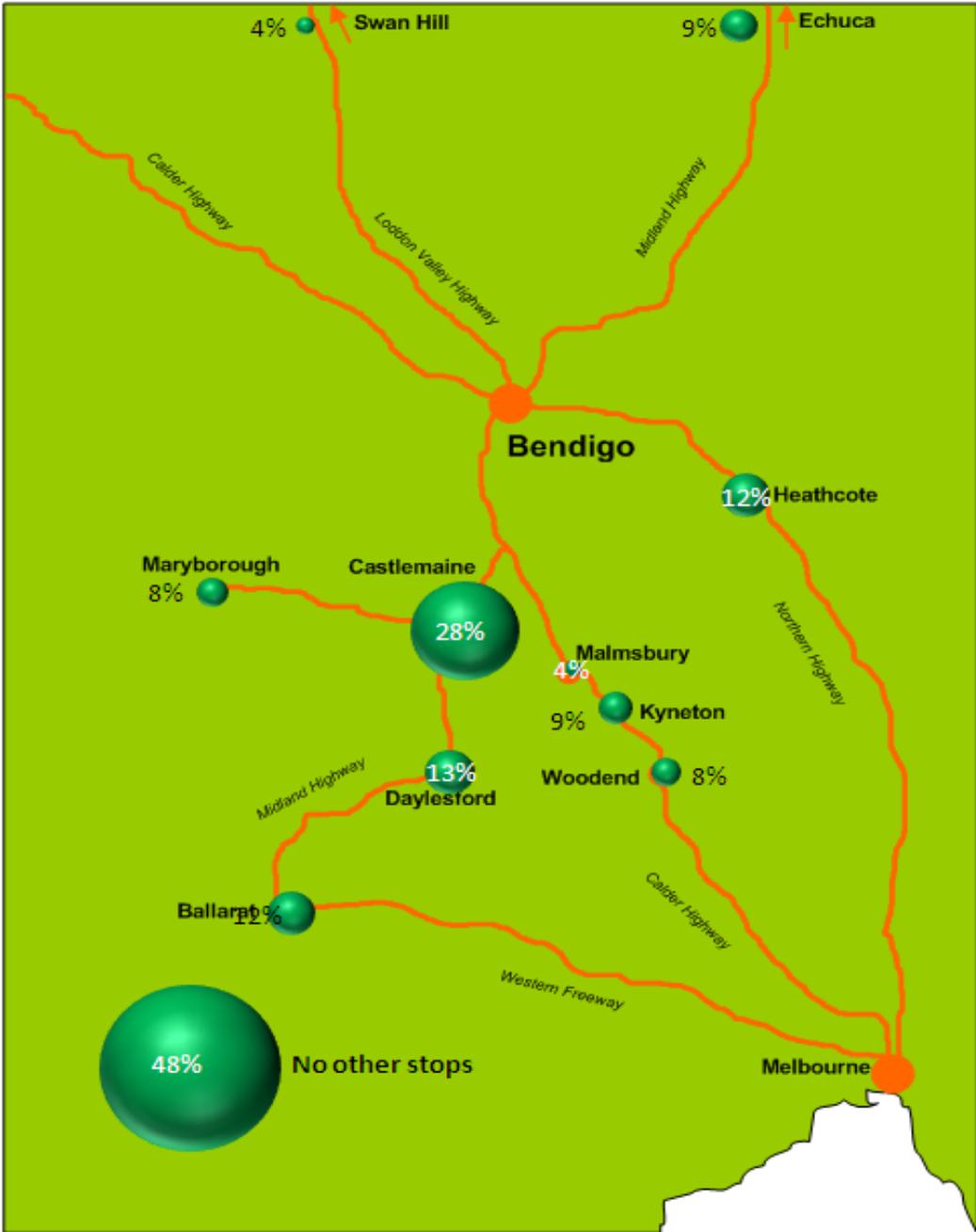
Towns visited during trip – day visit to Bendigo

55% of visitors who stopped for a day trip in Bendigo did not stop anywhere else



Towns visited during trip – stopped overnight in Bendigo

48% of visitors who stopped overnight in Bendigo did not stop anywhere else



Base = 158

“On this trip which, if any, of the following towns did you visit?”

Summary

- The majority of visitors were self drive (82%), eight points below the subgroup benchmark.
- The majority of visitors (52%) travelled to Bendigo on the Calder Highway from Melbourne, with 14% using the Midland/Northern Highway from Echuca and 12% the Hume/Northern Highway from Melbourne.
- The highest proportion also used Calder Highway to Melbourne to leave Bendigo (47%), with 18% using the Midland/Northern Highway to Echuca and 14% the Midland/Northern Highway to Ballarat.
- Other than Bendigo, the other most popular stop in the region was Castlemaine (27%). The majority of those who stopped in Castlemaine (87%) stopped there for a day trip.
- The majority of visitors who stopped overnight (86%) only stopped overnight in one town.
- More than half of visitors who stopped for a day trip in Bendigo (55%) did not stop anywhere else.
- Just under half of visitors who stopped overnight in Bendigo (48%) did not stop anywhere else. The most common stops were Castlemaine (28%), Daylesford (13%), Ballarat (12%) and Heathcote (12%).

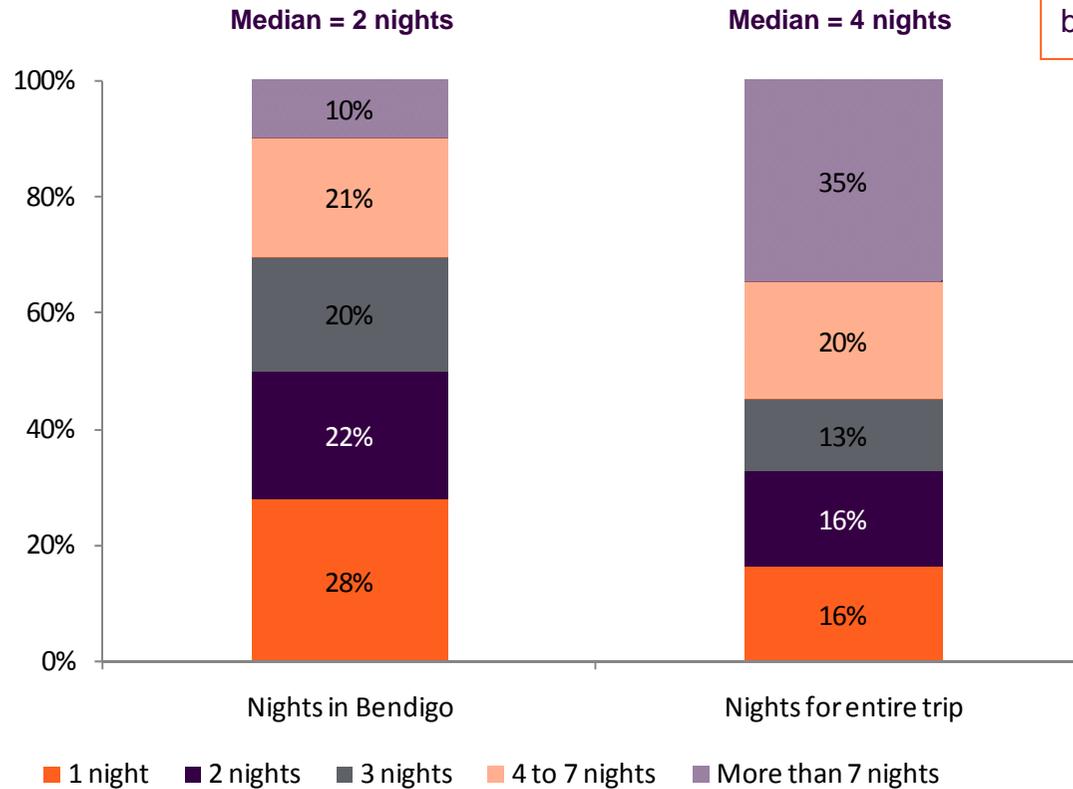
Staying in Bendigo

- Length of stay
- Accommodation used
- Profile of different accommodation users
- Expenditure

Three quarters of visitors stayed in Bendigo for at least one night

Length of Stay	Bend	Subgroup	All
Day Trip	25%	⇒ 3%	⇒ -2%
Overnight	75%	⇒ -3%	⇒ 2%

There were similar proportions of day and overnight visitors compared with the benchmarks.



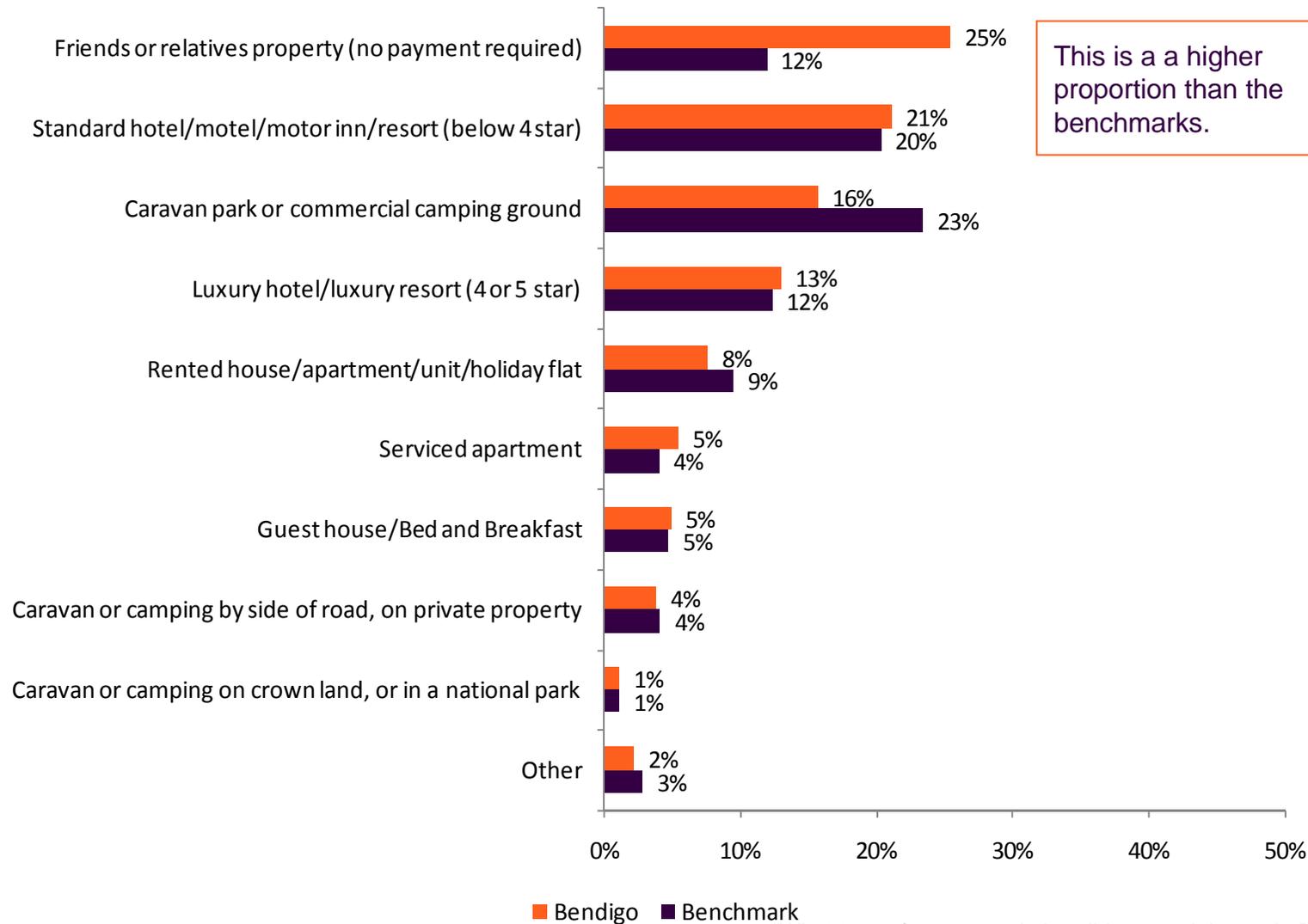
Base =184

Base =184

"How many nights did you stay in Bendigo during this trip?"

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

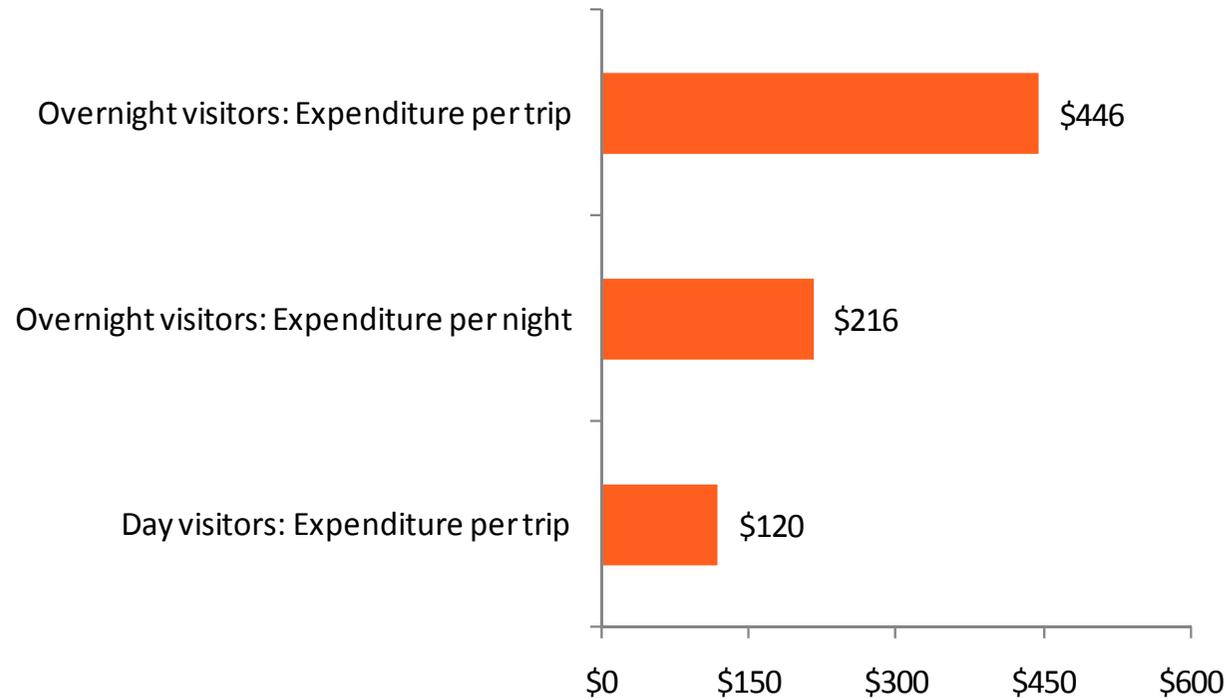
A quarter of visitors stayed with friends or relatives



Base =185

"What type of accommodation did you mainly use in Bendigo?"

Expenditure in Bendigo

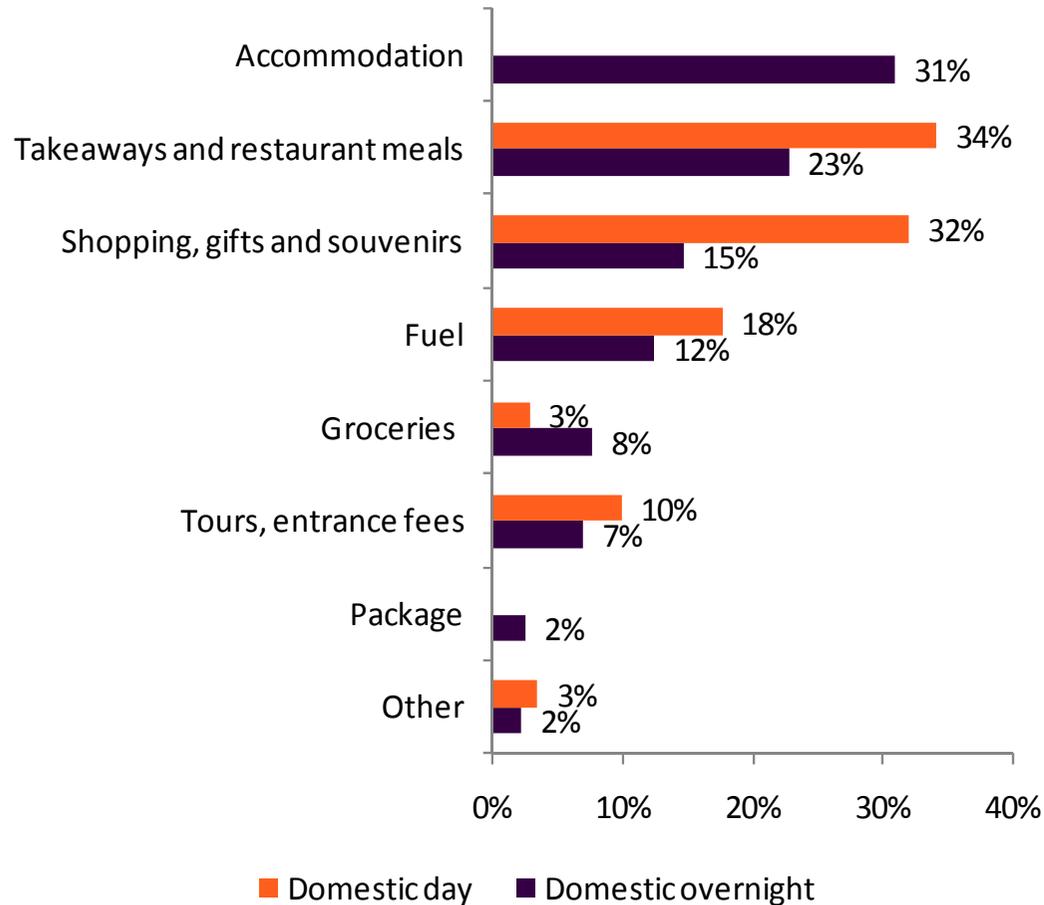


"How much have you spent so far in Bendigo, including any money paid before the trip, and excluding any package expenditure?"

"How much do you think you will spend in Bendigo for the remainder of your stay excluding any package expenditure?"

Bases: Day visitors 143; Overnight visitors 286; Median stay = 2 nights
Note: From recruitment data file

Nearly a third of overnight expenditure was on accommodation



Bases: Day visitors 143; Overnight visitors 286
Note: From recruitment data file

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

Summary

- Three quarters of visitors stopped at least one night in the region. This was a similar proportion to the benchmarks.
- The median stay was two nights with 90% of overnight trips less than seven nights.
- A quarter of visitors stayed with friends and/or relatives, 21% in standard hotels/motels, 16% in commercial caravan or camping grounds and 13% in luxury hotels/resorts.
- The proportion who stayed with friends and/or relatives was higher than the benchmarks.
- Domestic day visitors spent \$120 on average in Bendigo. The majority of the expenditure was on takeaways and restaurant meals (34%) and shopping (32%).
- Domestic overnight visitors spent \$216 per night or \$446 per trip while in Bendigo. About 31% of the expenditure was on accommodation and 23% on takeaways and restaurant meals.

Visitor and trip characteristics by segments

- Holiday versus VFR
- Family versus older life stages
- Travelling with partner versus immediate family
- First versus repeat visitor
- Day versus overnight visitor

Holiday/leisure versus VFR

A higher proportion of visitors in Bendigo for **holiday/leisure purposes** were: in the older life stages, travelling as a couple, from Victoria, first time visitors, self drive and staying in commercial accommodation (mainly standard hotel/motels or caravan or camping grounds) than **VFR** visitors.

	Holiday/leisure (55%)	VFR visitor (28%)
Life stage	Family 42% Older working 23% Older non-working 26% (n = 131)	Family 47% Older working 18% Older non-working 19% (n = 68)
Travel party	Partner 41% Immediate family 31% (n = 137)	Immediate family 37% Partner 27% Friends and/or family 21% (n = 70)
Origin	Intrastate 62% (n = 126)	Intrastate 42% (n = 65)
Repeat visitor	68% (n = 134)	87% (n = 70)

Holiday/leisure versus VFR

	Holiday/leisure (55%)	VFR visitor (28%)
Information sources	Non-internet only 41% Internet/non-internet sources 24% (n = 131)	Friends/relatives; Previous visits 39% Internet only 26% (n = 65)
Transport used	Self-drive 91% (n = 137)	Self-drive 71% Railway 11% Bus/coach 10% (n = 70)
Length stay in region (Nights)	Overnight visitors 72% Mean = 2 Median = 1.5 (n = 134)	Overnight visitors 84% Mean = 3 Median = 3 (n = 69)
Accommodation used	Standard hotel/motel 26% Commercial caravan or camping 24% (n = 98)	Friends or relatives 69% Standard hotel/motel 10% (n = 58)

Family versus older life stages

A higher proportion of visitors to Bendigo in the **family life stage** were: from Victoria, travelling to visit friends and relatives and travelling with their immediate family than visitors in the **older life stages**.

A higher proportion of visitors to Bendigo in the **older non-working life stage** were: in Bendigo for holiday/leisure purposes, from outside Victoria and staying with friends and/or relatives or in commercial caravan or camping accommodation than those in the **older working life stage**.

	Family (43%)	Older working (23%)	Older non-working (22%)
Purpose	Holiday/leisure 53% VFR 31% (n = 104)	Holiday/leisure 55% VFR 22% (n = 55)	Holiday/leisure 65% VFR 25% (n = 52)
Travel party	Partner 21% Immediate family 60% (n = 104)	Partner 47% Friends and/or relatives 20% (n = 55)	Partner 48% Friends and/or relatives 23% (n = 52)
Origin	Intrastate 63% (n = 100)	Intrastate 55% (n = 49)	Intrastate 41% (n = 49)
Repeat visitor	78% (n = 104)	80% (n = 54)	75% (n = 51)
Transport used	Self-drive 88% (n = 104)	Self-drive 82% (n = 55)	Self-drive 83% (n = 52)

Family versus older life stages

	Family (43%)	Older working (23%)	Older non-working (22%)
Information sources	Internet/non-internet sources 29% Non-internet only 23% Friends/relatives; Previous visits 23% (n = 97)	Non-internet only 39% Friends/relatives; Previous visits 22% (n = 54)	Non-internet only 43% Friends/relatives; Previous visits 25% (n = 51)
Length stay in region (Nights)	Overnight visitors 73% Mean = 3 Median = 1 (n = 103)	Overnight visitors 76% Mean = 3 Median = 1.5 (n = 54)	Overnight visitors 74% Mean = 3 Median = 2 (n = 50)
Accommodation used	Friends and/or relatives 28% Standard hotel/motel 24% (n = 75)	Standard hotel/motel 24% Friends and/or relatives 17% Luxury hotel/resort 17% (n = 42)	Friends and/or relatives 26% Standard hotel/motel 24% Commercial caravan or camping 24% (n = 38)

Travelling with partner versus immediate family

A higher proportion of visitors to Bendigo travelling with their **partner** were: there for holiday/leisure purposes, in the older life stages, first time visitors, from outside Victoria and staying in commercial caravan or camping accommodation than those travelling with their **family**.

	Partner (36%)	Immediate family (31%)
Purpose	Holiday/leisure 62% VFR 21% (n = 90)	Holiday/leisure 55% VFR 34% (n = 77)
Life stage	Older working 31% Older non-working 30% Family 26% (n = 84)	Family 82% (n = 76)
Origin	Intrastate 49% (n = 84)	Intrastate 64% (n = 74)
Repeat visitor	70% (n = 90)	80% (n = 76)

Travelling with partner versus immediate family

	Partner (36%)	Immediate family (31%)
Information sources	Non-internet only 40% Friends/relatives; Previous visits 19% (n = 86)	Internet/non-internet sources 30% Non-internet only 28% Friends/relatives; Previous visits 23% (n = 71)
Transport used	Self-drive 90% (n = 90)	Self-drive 88% (n = 77)
Length stay in region (Nights)	Overnight visitors 75% Mean = 2 Median = 1 (n = 89)	Overnight visitors 67% Mean = 2 Median = 1 (n = 75)
Accommodation used	Commercial caravan or camping 25% Standard hotel/motel 21% (n = 68)	Friends and/or relatives 31% Standard hotel/motel 24% (n = 49)

First versus repeat visitors

A higher proportion of **first time** visitors to Bendigo were: there for holiday/leisure purposes, in the young/midlife life stages, travelling with their partner, from outside Victoria and staying in commercial caravan or camping accommodation than **repeat** visitors.

	First time visitor (25%)	Repeat visitor (75%)
Purpose	Holiday/leisure 70% VFR 15% (n = 61)	Holiday/leisure 49% VFR 33% (n = 184)
Life stage	Family 39% Older working 19% Older non-working 22% Young/midlife 20% (n = 59)	Family 46% Older working 24% Older non-working 21% Young/midlife 9% (n = 178)
Travel party	Partner 44% Immediate family 25% (n = 61)	Partner 34% Immediate family 33% (n = 184)
Origin	Intrastate 28% (n = 50)	Intrastate 61% (n = 178)

First versus repeat visitors

	First time visitor (25%)	Repeat visitor 75%
Information sources	Non-internet only 49% Internet/non-internet sources 20% (n = 57)	Friends/relatives; Previous visits 27% Non-internet only 25% (n = 176)
Transport used	Self-drive 82% Bus/coach 10% (n = 61)	Self-drive 83% Railway 8% (n = 184)
Length stay in region (Nights)	Overnight visitors 75% Mean = 8 Median = 2 (n = 60)	Overnight visitors 76% Mean = 3 Median = 2 (n = 182)
Accommodation used	Standard hotel/motel 27% Commercial caravan or camping 24% (n = 45)	Friends and/or relatives 29% Standard hotel/motel 19% (n = 139)

Day versus overnight visitor

A higher proportion of **day** visitors to Bendigo were: there for holiday/leisure purposes, travelling with their family and from Victoria than **overnight** visitors.

	Day visit (25%)	Overnight visit 75%)
Purpose	Holiday/leisure 62% VFR 18% (n = 60)	Holiday/leisure 52% VFR 32% (n = 184)
Life stage	Family 47% Older working 22% Older non-working 22% (n = 60)	Family 43% Older working 23% Older non-working 21% (n = 176)
Travel party	Immediate family 42% Partner 37% (n = 60)	Immediate family 27% Partner 36% (n = 184)
Origin	Intrastate 64% (n = 53)	Intrastate 51% (n = 174)

Day versus overnight visitor

	Day visit (25%)	Overnight visit 75%)
Repeat visitor	75% (n = 59)	75% (n = 183)
Information sources	Non-internet only 41% Friends/relatives; Previous visits 33% (n = 58)	Non-internet only 28% Internet only 25% Internet/non-internet sources 22% (n = 176)
Transport used	Self-drive 88% (n = 60)	Self-drive 80% (n = 184)

Summary

- Visitors in Bendigo for holiday/leisure purposes were more likely to be in the older life stages, travelling as a couple, from Victoria, first time visitors, self drive and staying in commercial accommodation (mainly standard hotel/motels or caravan or camping grounds) than VFR visitors.
- Visitors in the family life stage were more likely to be from Victoria, travelling to visit friends and relatives and travelling with their immediate family than visitors in the older life stages.
- Visitors in the older non-working life stage were more likely to be in Bendigo for holiday/leisure purposes, from outside Victoria and staying with friends and/or relatives or in commercial caravan or camping accommodation than those in the older working life stage.
- Visitors to Bendigo travelling with their partner were more likely to be in Bendigo for holiday/leisure purposes, in the older life stages, first time visitors, from outside Victoria and staying in commercial caravan or camping accommodation than those travelling with their family.
- First time visitors to Bendigo were more likely to be in Bendigo for holiday/leisure purposes, in the young/midlife life stages, travelling with their partner, from outside Victoria and staying in commercial caravan or camping accommodation than repeat visitors.
- Day visitors to Bendigo were more likely to be in Bendigo for holiday/leisure purposes, travelling with their family and from Victoria than overnight visitors.

Visitor and trip characteristics by different survey periods (waves)

- Visitor profile
- Trip planning and booking
- Transport, length of stay and accommodation

Visitor profile by wave

	April 2007	March and April 2011
Purpose	Holiday/leisure 60% VFR 19% (n = 161)	Holiday/leisure 55% VFR 28% (n = 248)
Life stage	Family 23% Older working 19% Older non-working 46% (n = 156)	Family 43% Older working 23% Older non-working 22% (n = 240)
Travel party	Partner 46% Immediate family 15% Friends and/or relatives 17% (n = 162)	Partner 36% Immediate family 31% Friends and/or relatives 14% (n = 248)
Origin	Intrastate 59% (n = 152)	Intrastate 54% (n = 231)

Trip planning and booking by wave

	April 2007	March and April 2011
Repeat visitor	68% (n = 161)	75% (n = 245)
Trip planning	2 to 3 weeks before 23% 1 to 3 months before 26% More than 3 months before 17% (n = 150)	2 to 3 weeks before 21% 1 to 3 months before 24% More than 3 months before 23% (n = 235)
Information sources	Non-internet only 31% Friends/relatives; Previous visits 30% No research 17% (n = 163)	Non-internet only 31% Friends/relatives; Previous visits 23% (n = 236)
Booking sources	Internet 27% No bookings made 42% (n = 159)	Internet 36% No bookings made 44% (n = 232)

Transport, length of stay and accommodation by wave

	April 2007	March and April 2011
Transport used	Self drive 78% Railway 13% Bus/coach 8% (n = 160)	Self drive 82% Railway 6% Bus/coach 6% (n = 248)
Length stay in region (Nights)	Overnight visit 63% Mean = 2 Median = 1 (n = 165)	Overnight visit 75% Mean = 4 Median = 2 (n = 244)
Accommodation used	Commercial caravan or camping 30% Friends and/or relatives 25% Standard hotel/motel 24% (n = 101)	Commercial caravan or camping 16% Friends and/or relatives 25% Standard hotel/motel 21% (n = 185)

Summary

- There were a number of differences in the visitor and trip characteristics between the April 2007 and March/April 2011 studies.
- In April 2007:
 - There were higher proportions of holiday/leisure visitors and those visiting the region for the first time.
 - The highest proportion of visitors were in the older non-working life stage, travelling with their partner and staying in commercial caravan or camping accommodation.
 - The most common information sources were non-internet sources and previous visits friends and/or relatives.
 - The median stay was 1 night.
- In March/April 2011:
 - There were higher proportions of VFR visitors and those who had visited the region before.
 - The highest proportion of visitors were in the family life stage, travelling with their partner or immediate family and staying with friends and/or relatives.
 - The most common information sources were a combination of internet and non-internet sources.
 - The median stay was 2 nights.

Why they visited Bendigo and were they happy



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

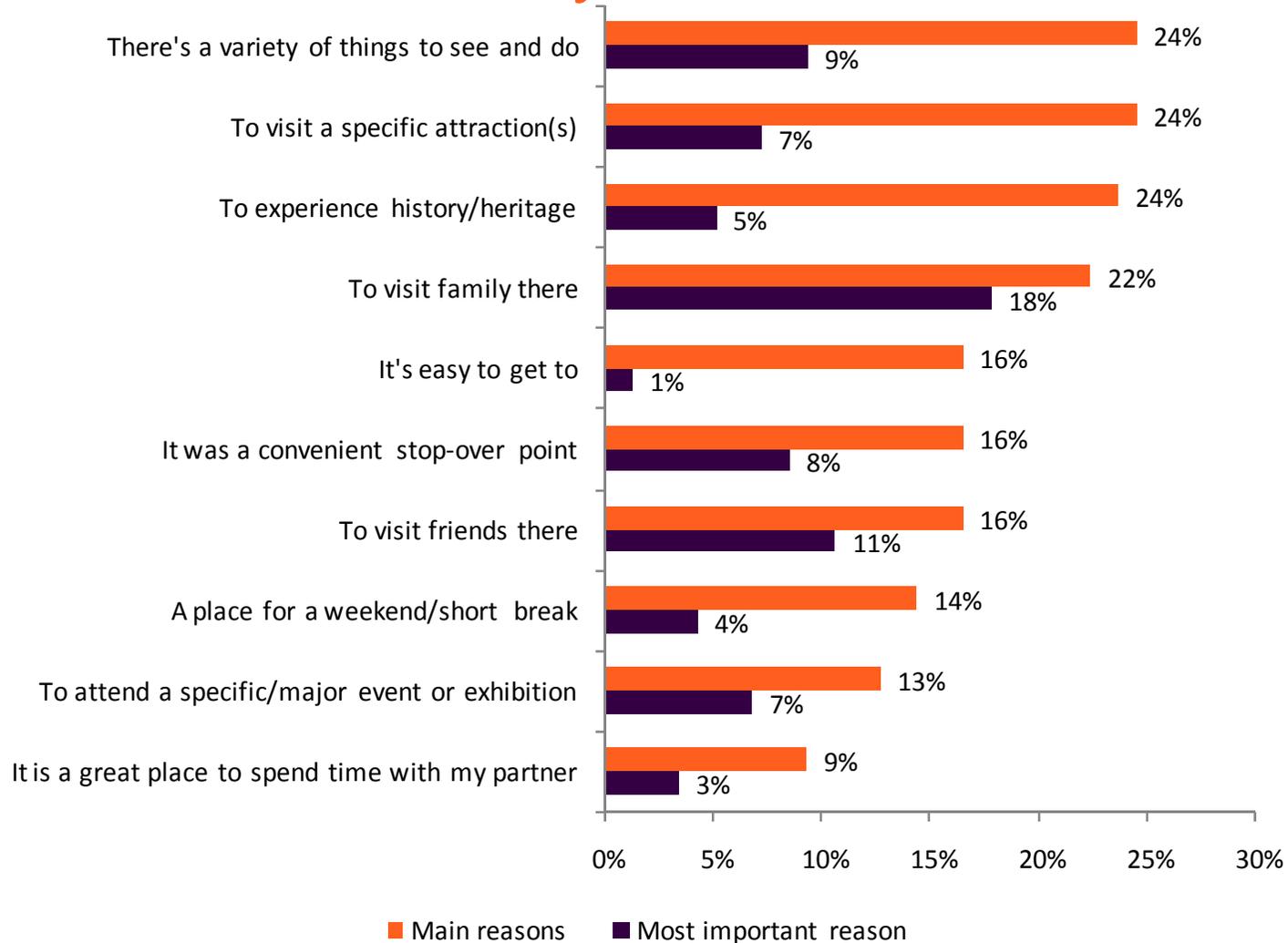


TRA TOURISM
RESEARCH
AUSTRALIA

Reasons for visiting Bendigo

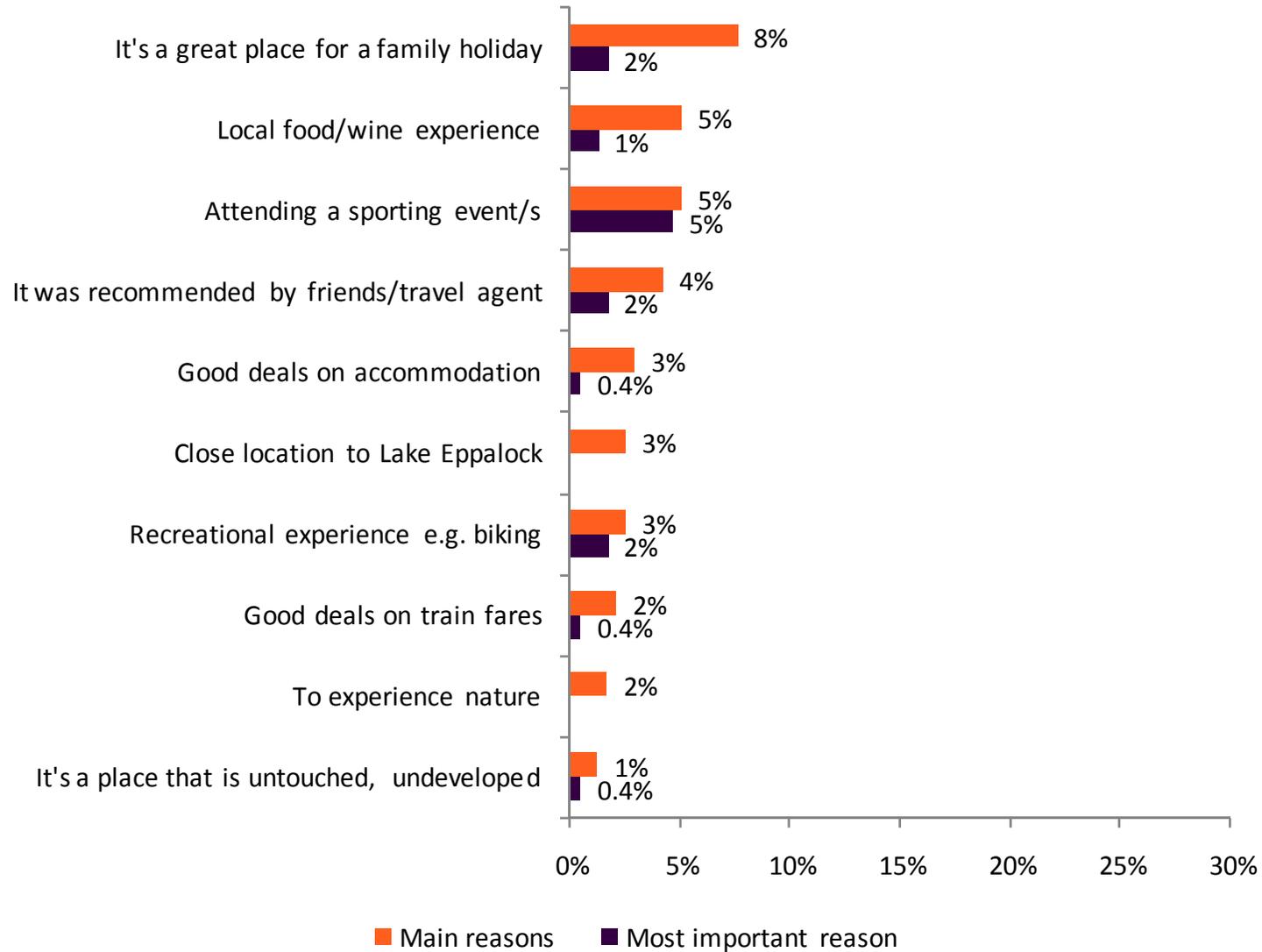
- Reasons for choosing destination
- Expectations of experiences

Reasons for visiting revolved around the variety, attractions, history/heritage and family/friends



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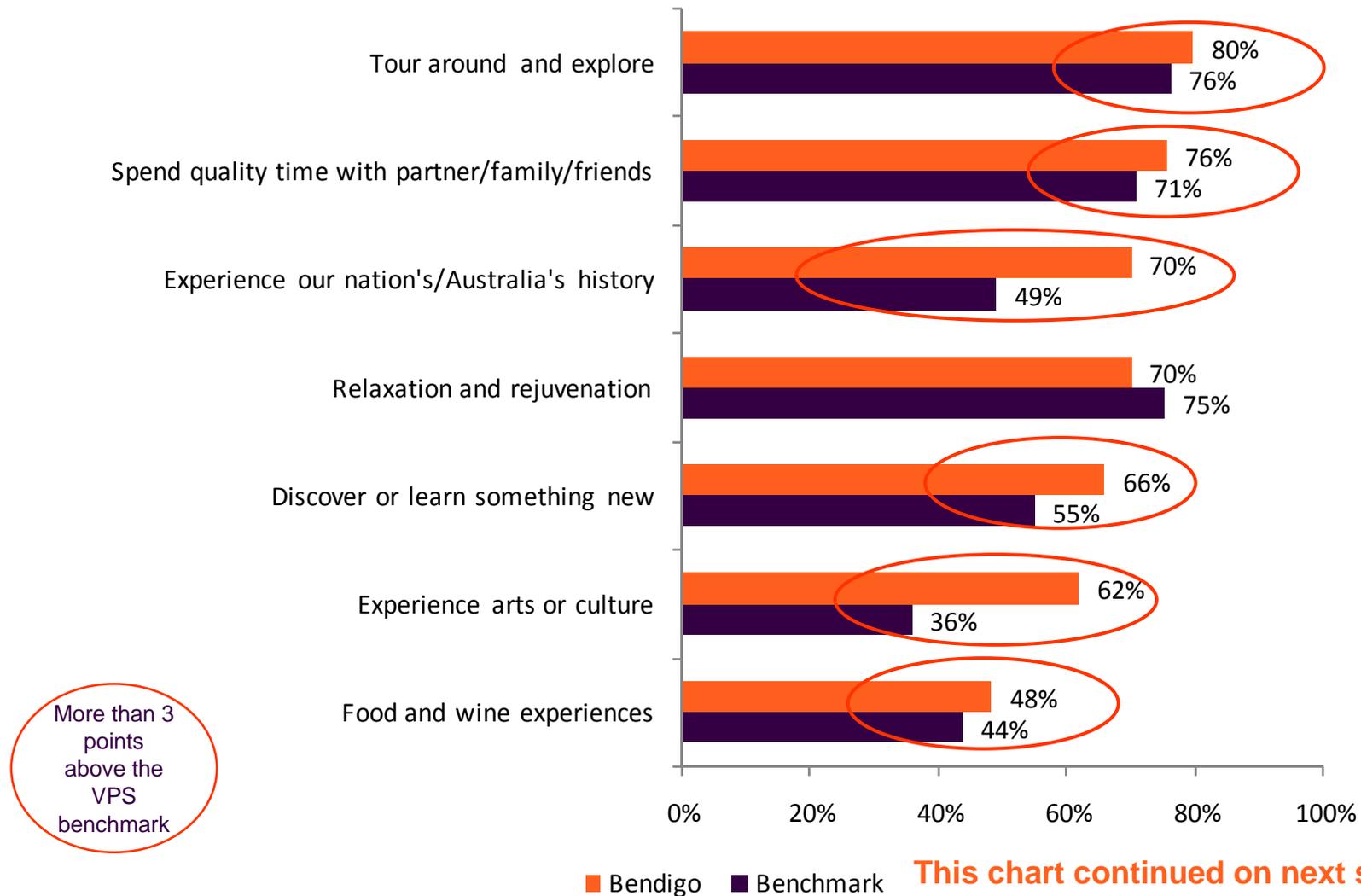


Bases: All respondents Main Reason = 237
All respondents Most important = 236

"Why did you chose Bendigo?"

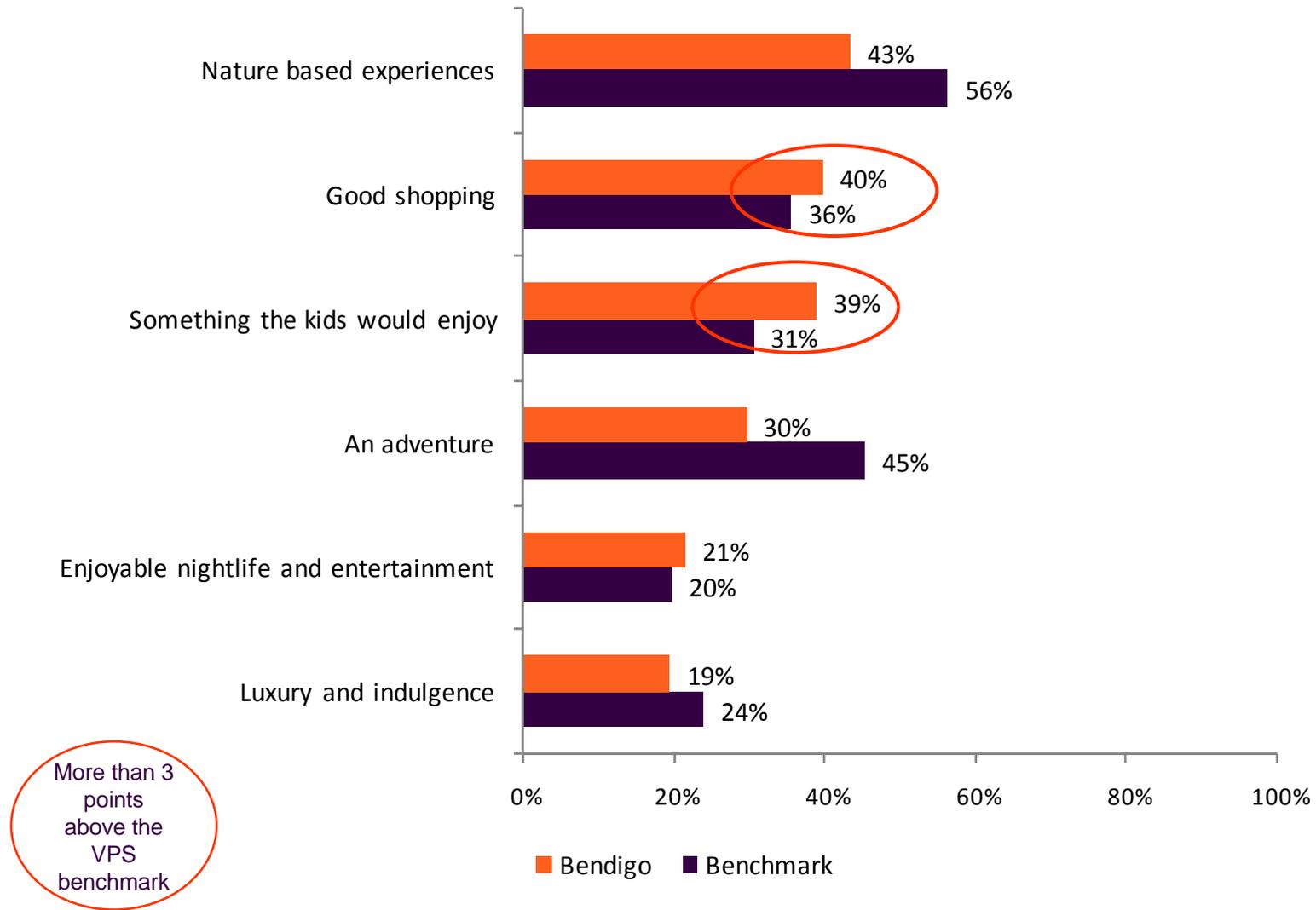
"Which of the following was most important in choosing Bendigo?"

Expectations for history/arts/culture, learning, something for the kids and shopping were above the benchmarks



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Base = 247

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

Holiday/leisure versus VFR

Expectations for holiday/leisure visitors revolved around experiencing the variety of things to see, do and discover.

Expectations for VFR visitors revolved around their family and friends.

	Holiday/leisure (More than 3 points above VFR)	VFR (More than 3 points above Holiday)	No difference (Within +/- 3 points)
Reasons for visiting	<ul style="list-style-type: none"> • Variety of things to see and do • Visit specific attractions • To experience history/heritage • Easy to get to • Convenient stopover • Place for a weekend or short break • A great place to spend time with partner • Good place for a family holiday • Local food/wine experience • Attend sporting events • Recommended by friends/travel agent • Recreational experience 	<ul style="list-style-type: none"> • Visit family/friends 	<ul style="list-style-type: none"> • Attend a specific/major event • Good deals on accommodation • Close to Lake Eppalock • To experience nature • A place that is untouched, undeveloped • Good deal on train fares
Expectations	<ul style="list-style-type: none"> • Tour around and explore • Experience Australia's history • Discover something new • Adventure • Luxury and indulgence 	<ul style="list-style-type: none"> • Spend quality time with family/friends • Food and wine experiences • Nature based experiences • Good shopping • Something the kids would enjoy • Enjoyable nightlife and entertainment 	<ul style="list-style-type: none"> • Relaxation and rejuvenation • Experience arts or culture

Travelling with partner versus immediate family

Visitors travelling with their family had a wider range of expectations than those travelling with just their partner -
Expectations revolved around keeping the kids happy at the same time as having a relaxing experience

	Partner (More than 3 points above Immediate family)	Immediate family (More than 3 points above Partner)	No difference (Within +/- 3 points)
Reasons for visiting	<ul style="list-style-type: none"> • Variety of things to see and do • Visit friends • Convenient stopover • A great place to spend time with partner • Recommended by friends/travel agent • Close to Lake Eppalock 	<ul style="list-style-type: none"> • Visit specific attractions • Visit family • Easy to get around • Good place for a family holiday 	<ul style="list-style-type: none"> • To experience history/heritage • Place for a weekend or short break • Attend a specific/major event • Local food/wine experience • Attend sporting events • Good deals on accommodation • Recreational experience • To experience nature • A place that is untouched, undeveloped • Good deal on train fares
Expectations	<ul style="list-style-type: none"> • Good shopping 	<ul style="list-style-type: none"> • Relaxation and rejuvenation • Discover something new • Nature based experiences • Something the kids would enjoy • An adventure 	<ul style="list-style-type: none"> • Tour around and explore • Spend quality time with family/friends • Experience Australia's history • Experience arts or culture • Food and wine experiences • Enjoyable nightlife and entertainment • Luxury and indulgence

First versus repeat visitors

First time visitors were more likely to be visiting Bendigo because of the history and heritage of the area and the expectation they could tour around and explore and discover something new compared with repeat visitors.

Reasons for visiting for repeat visitors were more likely to revolve around relaxing and spending quality time with family and friends than first time visitors.

	First time visitor (More than 3 points above Repeat visitor)	Repeat visitor (More than 3 points above First time visitor)	No difference (Within +/- 3 points)
Reasons for visiting	<ul style="list-style-type: none"> • To experience history/heritage • Convenient stopover • Visit friends • Good place for a family holiday • Recommended by friends/travel agent 	<ul style="list-style-type: none"> • Variety of things to see and do • Visit family • Easy to get around • A great place to spend time with partner • Attend a specific/major event • Local food/wine experience • Close to Lake Eppalock • Recreational experience 	<ul style="list-style-type: none"> • Visit specific attractions • Place for a weekend or short break • Attend sporting events • Good deal on train fares • Good deals on accommodation • To experience nature • A place that is untouched, undeveloped
Expectations	<ul style="list-style-type: none"> • Tour around and explore • Experience Australia's history • Discover something new • An adventure 	<ul style="list-style-type: none"> • Spend quality time with family/friends • Relaxation and rejuvenation • Food and wine experiences • Good shopping • Something the kids would enjoy • Enjoyable nightlife and entertainment • Luxury and indulgence 	<ul style="list-style-type: none"> • Experience arts or culture • Nature based experiences

Day versus overnight visitors

Day visitors were more likely to visit Bendigo to visit specific attractions than overnight visitors. They were also more likely to expect food and wine experiences.

Reasons for visiting for overnight visitors were more likely to revolve around relaxing and spending quality time with family and friends than day visitors.

	Day visitor (More than 3 points above Overnight visitor)	Overnight visitor (More than 3 points above Day visitor)	No difference (Within +/- 3 points)
Reasons for visiting	<ul style="list-style-type: none"> • Visit specific attractions • To experience history/heritage • Recommended by friends/travel agent 	<ul style="list-style-type: none"> • Variety of things to see and do • Visit family • Visit friends • Place for a weekend or short break • Good place for a family holiday • Local food/wine experience • Attend sporting events • Good deals on accommodation • Close to Lake Eppalock 	<ul style="list-style-type: none"> • Easy to get around • Convenient stopover • Attend a specific/major event • A great place to spend time with partner • Good deal on train fares • Recreational experience • To experience nature • A place that is untouched, undeveloped
Expectations	<ul style="list-style-type: none"> • Experience arts or culture • Food and wine experiences • Something the kids would enjoy 	<ul style="list-style-type: none"> • Tour around and explore • Spend quality time with family/friends • Relaxation and rejuvenation • Enjoyable nightlife and entertainment 	<ul style="list-style-type: none"> • Experience Australia's history • Discover something new • Nature based experiences • Good shopping • An adventure • Luxury and indulgence

Comparison between waves

Visitors in the most recent wave had a wider range of expectations than the April 2007 wave.
 The common expectation between waves was for experiencing Australia's history and heritage.

	April 2007 (More than 3 points above 2011 wave)	March and April 2011 (More than 3 points above 2007 wave)	No difference (Within +/- 3 points)
Reasons for visiting	<ul style="list-style-type: none"> • Variety of things to see and do • Visit specific attractions • Convenient stopover • Visit friends • A great place to spend time with partner 	<ul style="list-style-type: none"> • Visit family • Attend a specific/major event 	<ul style="list-style-type: none"> • Good place for a family holiday • Recommended by friends/travel agent • Good deals on accommodation • Good deal on train fares • To experience nature • A place that is untouched, undeveloped
Expectations		<ul style="list-style-type: none"> • Tour around and explore • Spend quality time with family/friends • Relaxation and rejuvenation • Discover something new • Experience arts or culture • Food and wine experiences • Nature based experiences • Good shopping • Something the kids would enjoy • Enjoyable nightlife and entertainment • Luxury and indulgence 	<ul style="list-style-type: none"> • Experience Australia's history • An adventure

Reasons for visiting not included in April 2007: To experience history/heritage; Easy to get around; Place for a weekend or short break; Local food/wine experience; Attend sporting events; Close to Lark's Leap look, recreational experience

Summary

- The main reasons for visiting Bendigo were because there were a variety of things to see and do (24%), to visit specific attractions (24%), to experience history/heritage (24%) and to visit family there (22%).
- The single most important reason for visiting Bendigo was to visit family there (18%) or visit friends there (11%).
- The majority of visitors expected to tour around and explore (80%), spend quality time with others (76%), experience our nation's/Australia's history (70%), relax and rejuvenate (70%), discover and learn something new (66%) and to experience arts or culture (62%). With the exception of relaxing and rejuvenate, all of these experiences were above the benchmarks.
- The expectations for good shopping (40%) and something the kids would enjoy (39%) were also above both the benchmarks. The expectations for food and wine experiences (48%) was above the VPS benchmark.
- Expectations for holiday/leisure visitors revolved around experiencing the variety of things to see, do and discover where as expectations for VFR visitors revolved around their family and friends.

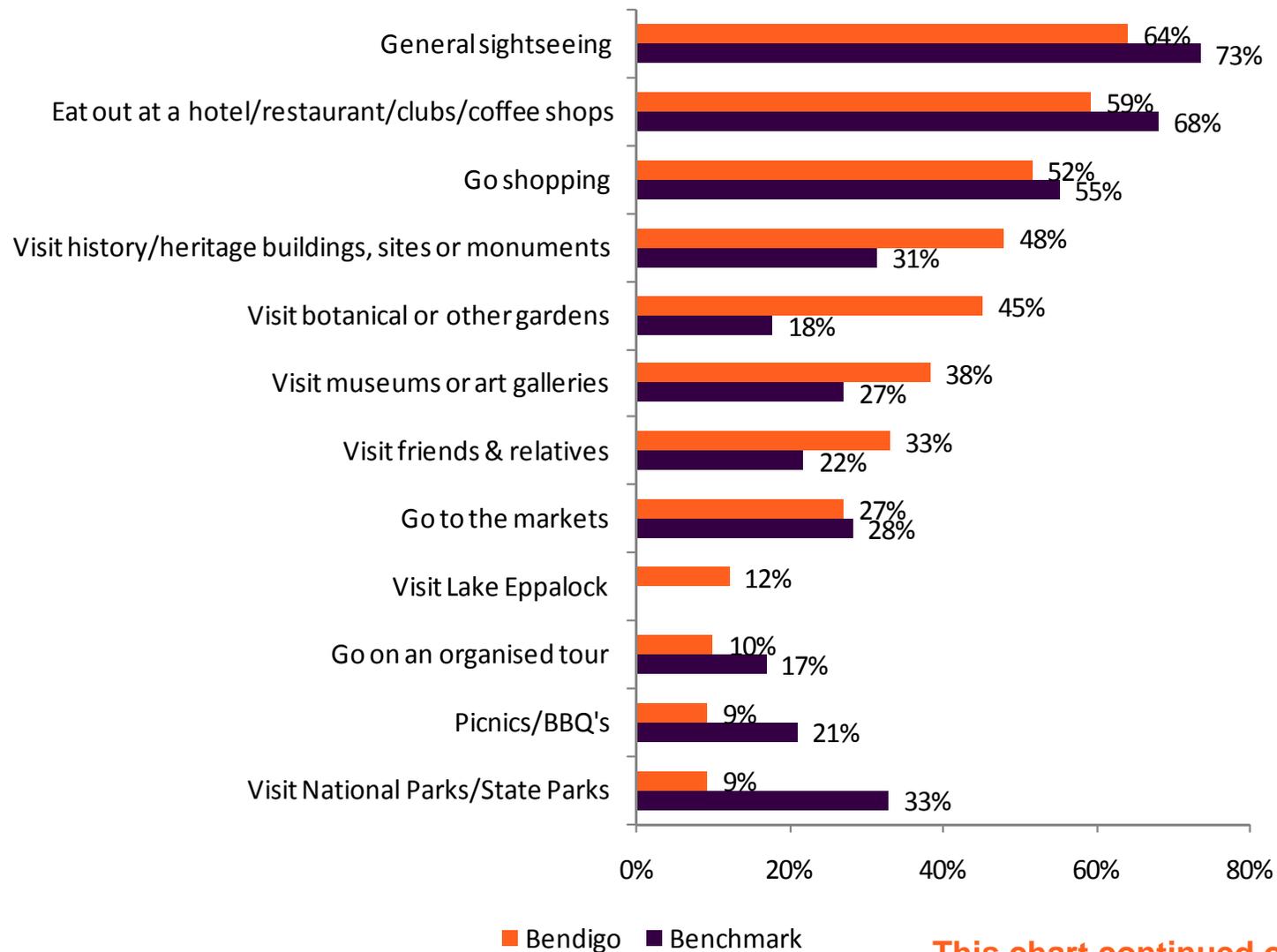
Summary

- Visitors travelling with their family had a wider range of expectations than those travelling with just their partner - expectations revolved around keeping the kids happy at the same time as having a relaxing experience.
- First time visitors were more likely to be visiting Bendigo because of the history and heritage of the area and the expectation they could tour around and explore and discover something new compared with repeat visitors. In contrast, reasons for visiting Bendigo for repeat visitors were more likely to revolve around relaxing and spending quality time with family and friends than first time visitors.
- Day visitors were more likely to visit Bendigo to visit specific attractions than overnight visitors. They were also more likely to expect food and wine experiences. In contrast reasons for visiting for overnight visitors were more likely to revolve around relaxing and spending quality time with family and friends than day visitors.
- Visitors in March/April 2011 had a wider range of expectations than the April 2007 wave. The common expectation between waves was for experiencing Australia's history and heritage.

What did they do in Bendigo?

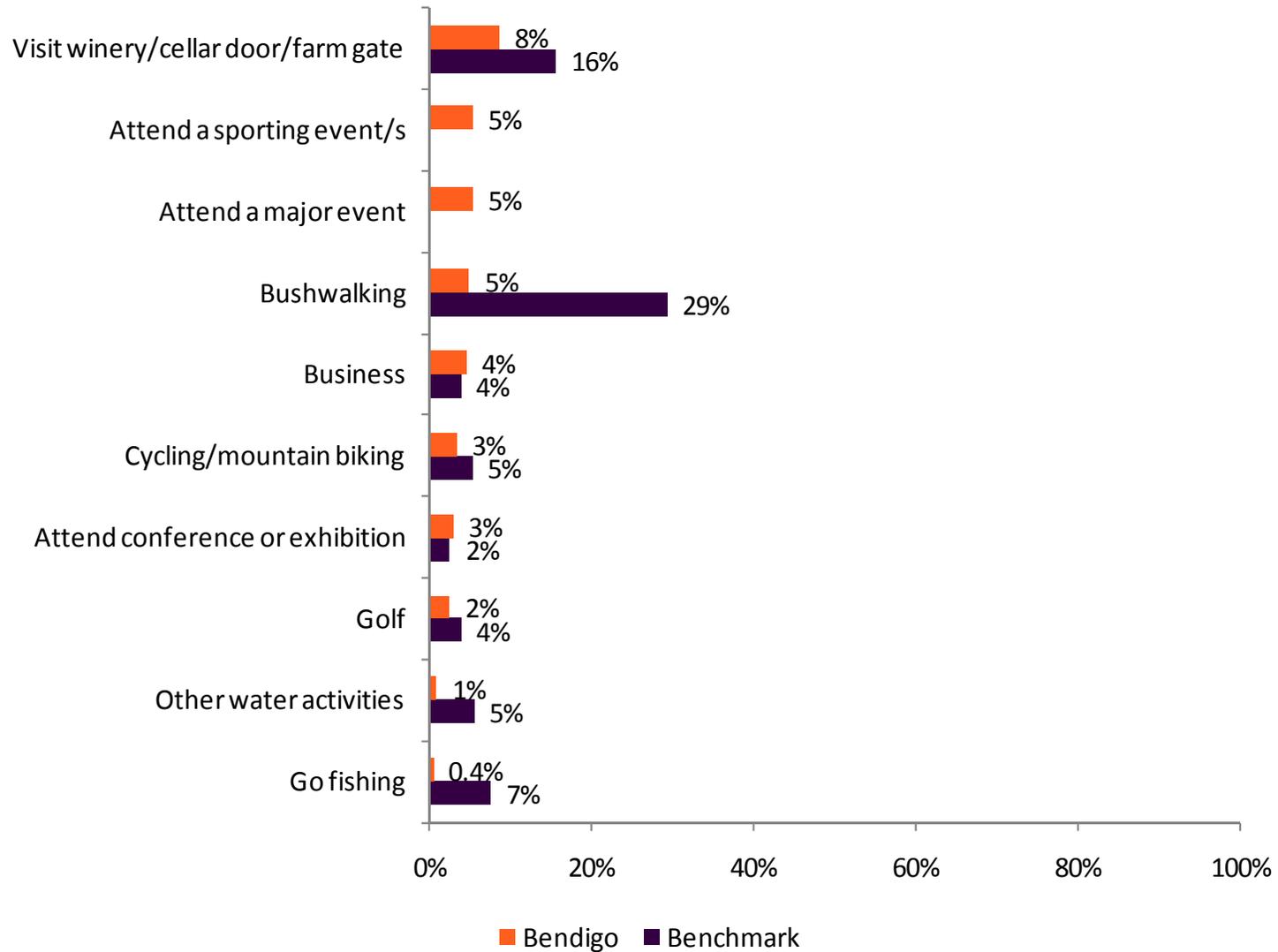
- Activities
- Attractions

Activities around history/heritage sites, museums/galleries and gardens were above the benchmarks



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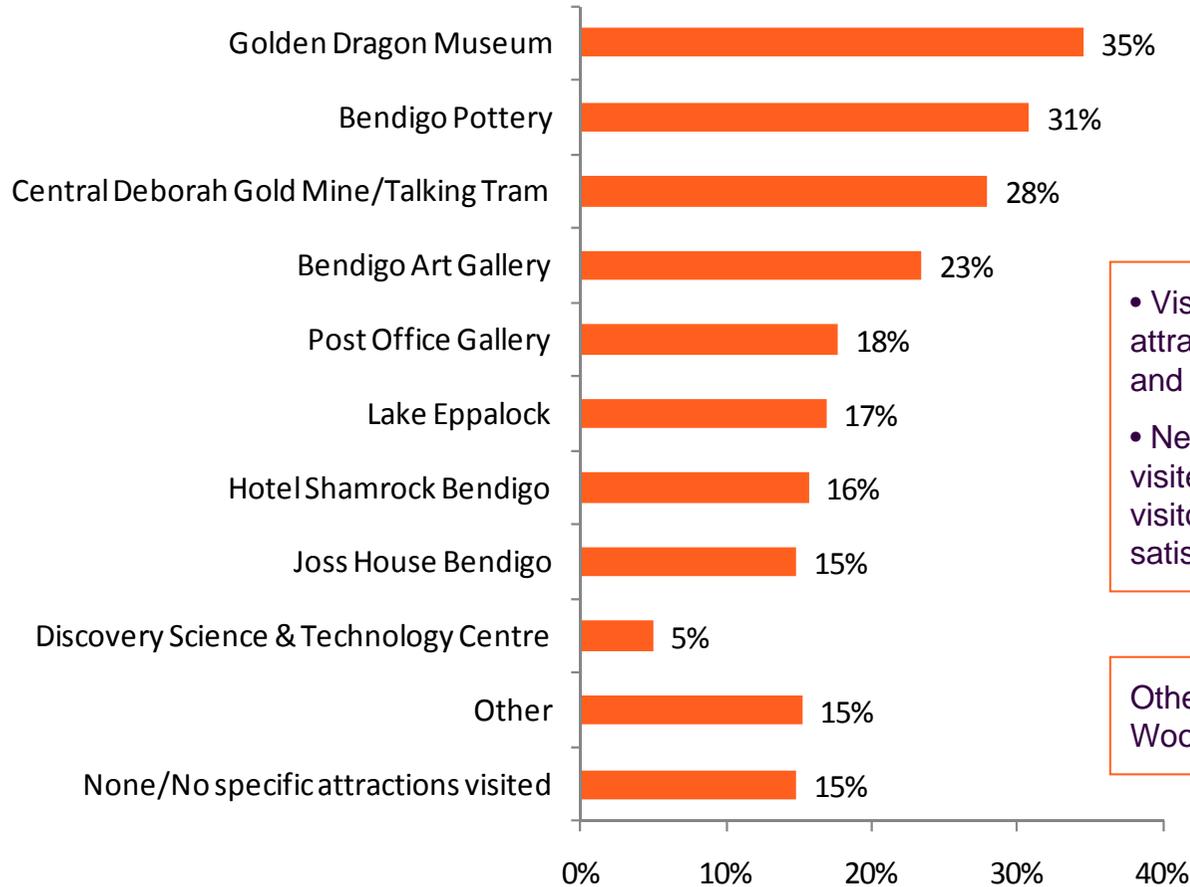
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Base = 248

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

Golden Dragon Museum and Bendigo Pottery were the most visited attractions



Attractions	Very satisfied
Bend	57%
Difference to subgroup	↑ 4%
Difference to all	↑ 8%

- Visitors were more satisfied with the attractions in Bendigo than both the subgroup and VPS benchmarks.
- Nearly three quarters (72%) of visitors who visited Golden Dragon Museum and 69% of visitors who visited Bendigo Pottery were very satisfied with the attractions in Bendigo.

Other attractions visited included Bendigo Woollen Mills, Markets and Cathedral

Holiday/leisure versus VFR

Holiday/leisure visitors were more likely to undertake a wider range of activities including visiting a number attractions than VFR visitors.

VFR visitors were more likely to undertake activities revolving around their family/friends and shopping than holiday/leisure visitors.

	Holiday/leisure (More than 3 points above VFR)	VFR (More than 3 points above Holiday/leisure)	No difference (Within +/- 3 points)
Activities	<ul style="list-style-type: none"> • General sightseeing • Visit history/heritage buildings • Visit botanical gardens • Visit museums or galleries • Organised tours • Visit National/state parks • Visit winery/cellar door • Attend a sporting event 	<ul style="list-style-type: none"> • Visit friends and relatives • Shopping • Go to markets • Visit Lake Eppalock • Bushwalking • Golf 	<ul style="list-style-type: none"> • Eating out • Picnics and BBQs • Attend a major event • Business • Convention/conference • Cycling/mountain biking • Other water activities • Go fishing
Attractions	<ul style="list-style-type: none"> • Bendigo Pottery • Central Deborah Goldmine/Talking Tram • Bendigo Art Gallery • Post Office Gallery • Joss House Bendigo 	<ul style="list-style-type: none"> • Lake Eppalock 	<ul style="list-style-type: none"> • Golden Dragon Museum • Hotel Shamrock Bendigo • Discovery Science and Technology Centre

Travelling with partner versus immediate family

Visitors travelling with their partner were more likely to visit history/heritage buildings, botanical gardens and go to the markets than those travelling with their family. In contrast those travelling with their family were more likely to undertake more active activities like attending sporting events, bushwalking and cycling.

	Partner (More than 3 points above Immediate family)	Immediate family (More than 3 points above Partner)	No difference (Within +/- 3 points)
Activities	<ul style="list-style-type: none"> • General sightseeing • Eating out • Shopping • Visit history/heritage buildings • Visit botanical gardens • Go to markets • Visit Lake Eppalock 	<ul style="list-style-type: none"> • Visit friends and relatives • Attend a sporting event • Bushwalking • Cycling/mountain biking 	<ul style="list-style-type: none"> • Visit museums or galleries • Organised tours • Picnics and BBQs • Visit National/state parks • Visit winery/cellar door • Attend a major event • Business • Convention/conference • Golf • Other water activities • Go fishing
Attractions	<ul style="list-style-type: none"> • Bendigo Pottery • Bendigo Art Gallery • Post Office Gallery • Lake Eppalock • Hotel Shamrock Bendigo • Joss House Bendigo 	<ul style="list-style-type: none"> • Golden Dragon Museum • Central Deborah Goldmine/Talking Tram • Discovery Science and Technology Centre 	

First versus repeat visitors

First time visitors were more likely to visit history/heritage buildings, museums or galleries, botanical gardens and markets than repeat visitors.

	First time visitor (More than 3 points above Repeat visitor)	Repeat visitor (More than 3 points above First time visitor)	No difference (Within +/- 3 points)
Activities	<ul style="list-style-type: none"> • General sightseeing • Shopping • Visit history/heritage buildings • Visit botanical gardens • Visit museums or galleries • Go to markets • Organised tours • Business 	<ul style="list-style-type: none"> • Eating out • Visit friends and relatives • Convention/conference 	<ul style="list-style-type: none"> • Visit Lake Eppalock • Picnics and BBQs • Visit National/state parks • Visit winery/cellar door • Attend a sporting event • Attend a major event • Bushwalking • Cycling/mountain biking • Golf • Other water activities • Go fishing
Attractions	<ul style="list-style-type: none"> • Golden Dragon Museum • Central Deborah Goldmine/Talking Tram • Post Office Gallery • Joss House Bendigo 	<ul style="list-style-type: none"> • Bendigo Art Gallery • Hotel Shamrock Bendigo 	<ul style="list-style-type: none"> • Bendigo Pottery • Lake Eppalock • Discovery Science and Technology Centre

Day versus overnight visitors

Overnight visitors were more likely to undertake a wider range of activities than day visitors.

	Day visitor (More than 3 points above Overnight visitor)	Overnight visitor (More than 3 points above Day visitor)	No difference (Within +/- 3 points)
Activities	<ul style="list-style-type: none"> • Visit botanical gardens 	<ul style="list-style-type: none"> • General sightseeing • Eating out • Shopping • Visit history/heritage buildings • Visit friends and relatives • Go to markets • Visit Lake Eppalock • Organised tours • Visit National/state parks • Visit winery/cellar door • Attend a sporting event • Attend a major event • Bushwalking • Business • Cycling/mountain biking 	<ul style="list-style-type: none"> • Visit museums or galleries • Picnics and BBQs • Convention/conference • Golf • Other water activities • Go fishing
Attractions	<p><i>There were no attractions day visitors were more likely to visit than overnight visitors.</i></p>	<ul style="list-style-type: none"> • Golden Dragon Museum • Central Deborah Goldmine/Talking Tram • Post Office Gallery • Lake Eppalock • Hotel Shamrock Bendigo 	<ul style="list-style-type: none"> • Bendigo Pottery • Bendigo Art Gallery • Joss House Bendigo • Discovery Science and Technology Centre

Comparison between waves

A higher proportion of visitors visited museums and galleries and undertook organised tours in April 2007 than March and April 2011.

	April 2007 (More than 3 points above 2011 wave)	March and April 2011 (More than 3 points above 2007 wave)	No difference (Within +/- 3 points)
Activities	<ul style="list-style-type: none"> • Visit museums or galleries • Organised tours 	<ul style="list-style-type: none"> • Eating out • Shopping • Visit friends and relatives • Go to markets • Visit National/state parks 	<ul style="list-style-type: none"> • General sightseeing • Visit history/heritage buildings • Visit botanical gardens • Picnics and BBQs • Visit winery/cellar door • Bushwalking • Business • Convention/conference • Fishing

Reasons for visiting not included in April 2007: Visit Lake Eppalock; Cycling; Golf; Attend a sporting event; Attend a major event; Other water activities

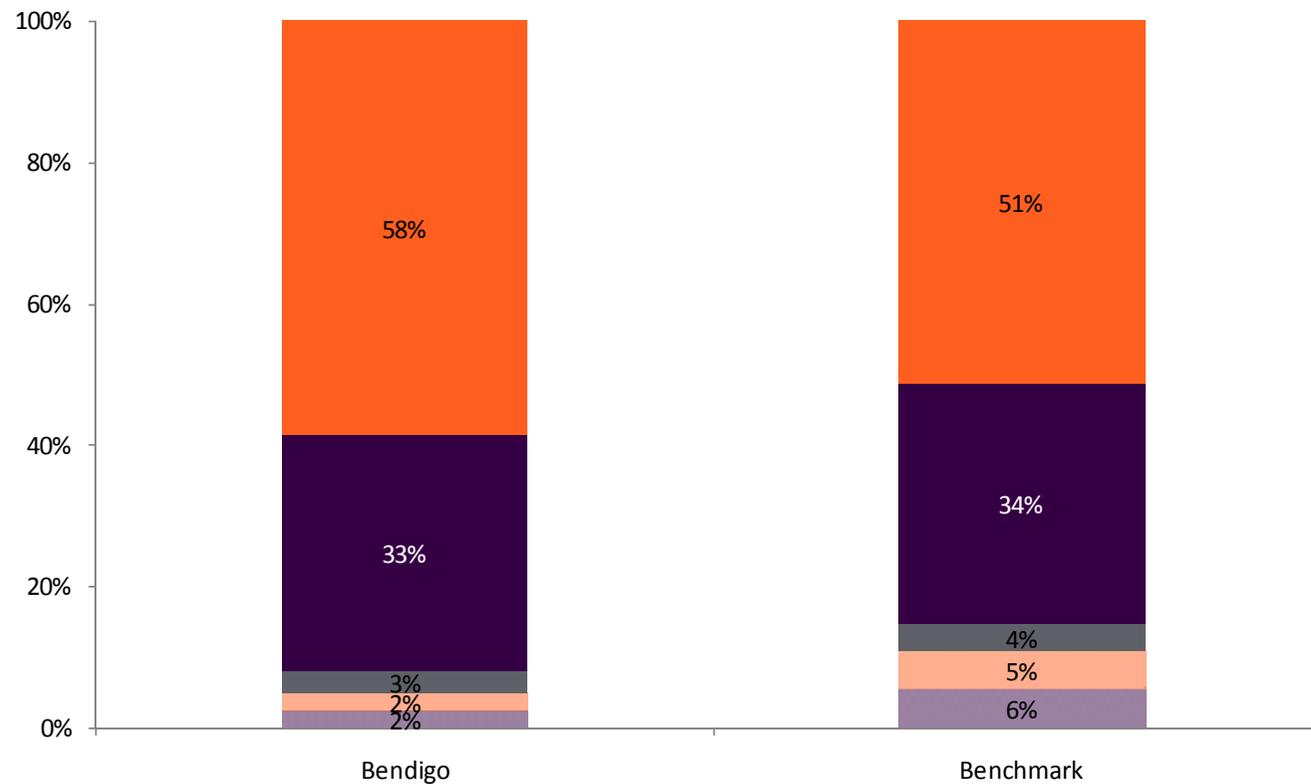
Summary

- The activities undertaken by the majority of visitors to Bendigo included sightseeing (64%), eating out (59%) and shopping (52%). The proportions who undertook these activities were less than the sub group and VPS benchmarks.
- The proportion of visitors visiting history/heritage sights and monuments (48%), visiting botanical gardens (45%), visiting museums or art galleries (38%) and visiting friends and/relatives (33%) were above both benchmarks.
- The most visited attractions in Bendigo were the Golden Dragon Museum (35%), Bendigo Pottery (31%), Central Deborah Gold Mine/Talking Tram (28%) and Bendigo Art Gallery (23%).
- Holiday/leisure visitors were more likely to undertake a wider range of activities including visiting a number attractions than VFR visitors, whereas VFR visitors were more likely to undertake activities revolving around their family/friends and shopping than holiday/leisure visitors.
- Visitors travelling with their partner were more likely to visit history/heritage buildings, botanical gardens and go to the markets than those travelling with their family. In contrast those travelling with their family were more likely to undertake more active activities like attending sporting events, bushwalking and cycling.
- First time visitors were more likely to visit history/heritage buildings, museums or galleries, botanical gardens and markets than repeat visitors.

Visitor satisfaction in Bendigo

- Overall satisfaction
- Were expectations met
- New experience development
- Importance of destination attributes
- Satisfaction with destination attributes
- Recommendation
- Revisitation

A higher proportion of visitors were very satisfied compared with the benchmarks



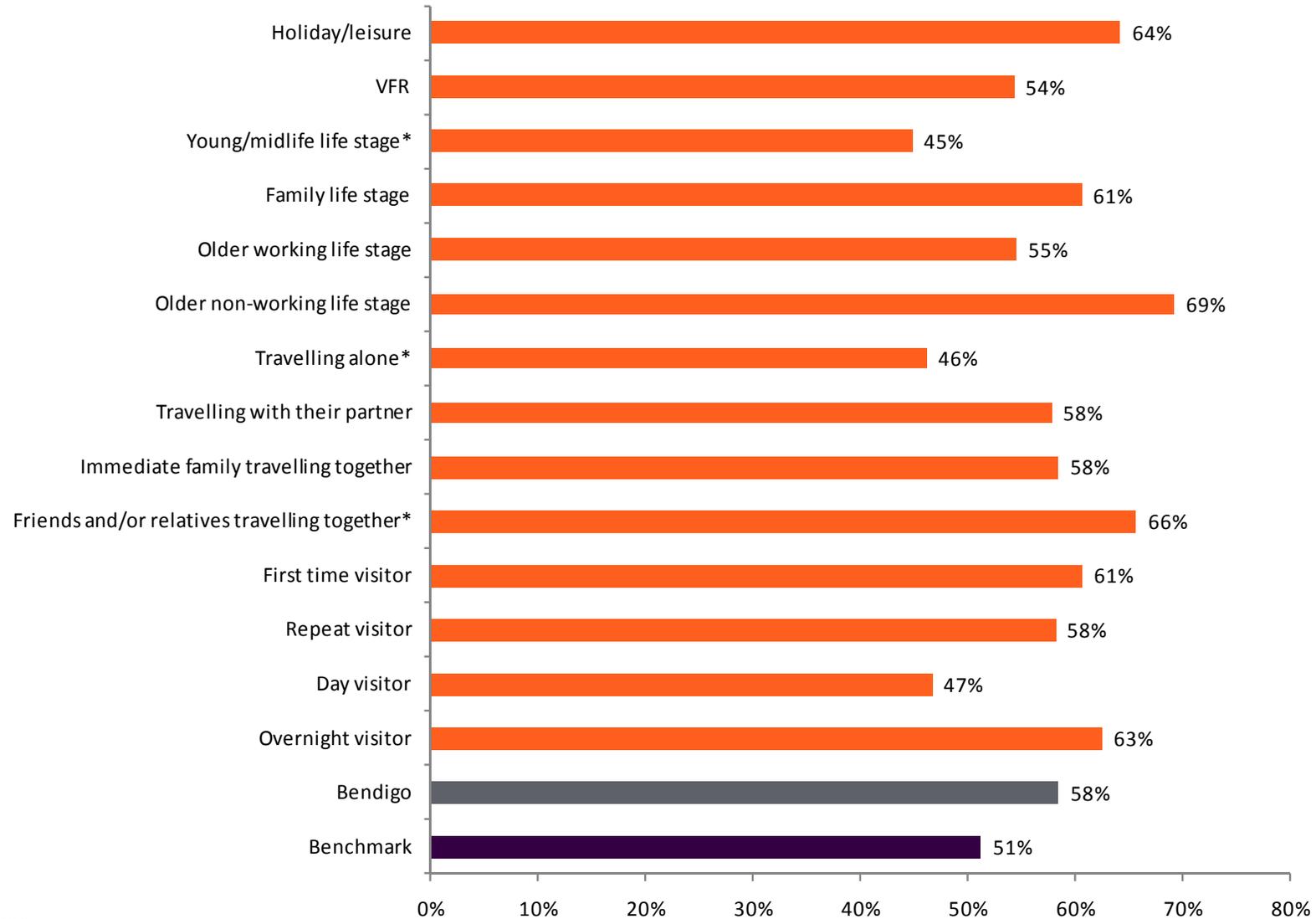
■ Very dissatisfied
 ■ Fairly dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Fairly satisfied
 ■ Very satisfied

Key Metrics	Total Sat	V Sat	Total Dis
Overall Satisfaction	92%	58%	5%
Difference to subgroup	↘ 3%	↘ 2%	↘ -3%
Difference to all	↗ 7%	↗ 7%	↘ -6%

Base = 248

“Overall, how satisfied or dissatisfied were you with your experience at Bendigo?”

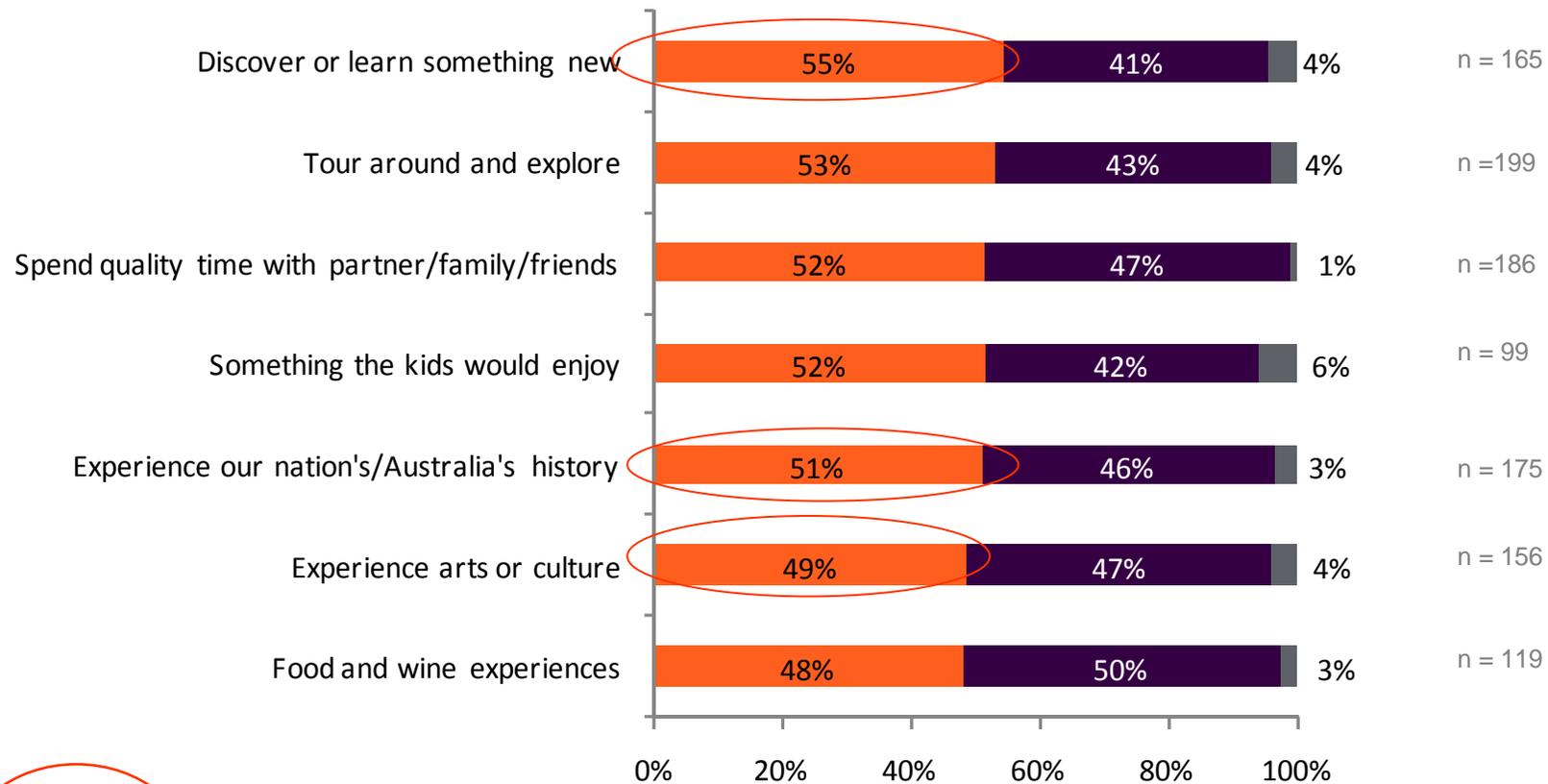
Overall satisfaction was lower for day visitors, those travelling alone and younger visitors



* Small base

"Overall, how satisfied or dissatisfied were you with your experience at Bendigo?"

A number of experiences were rated as better than expected compared with the benchmarks

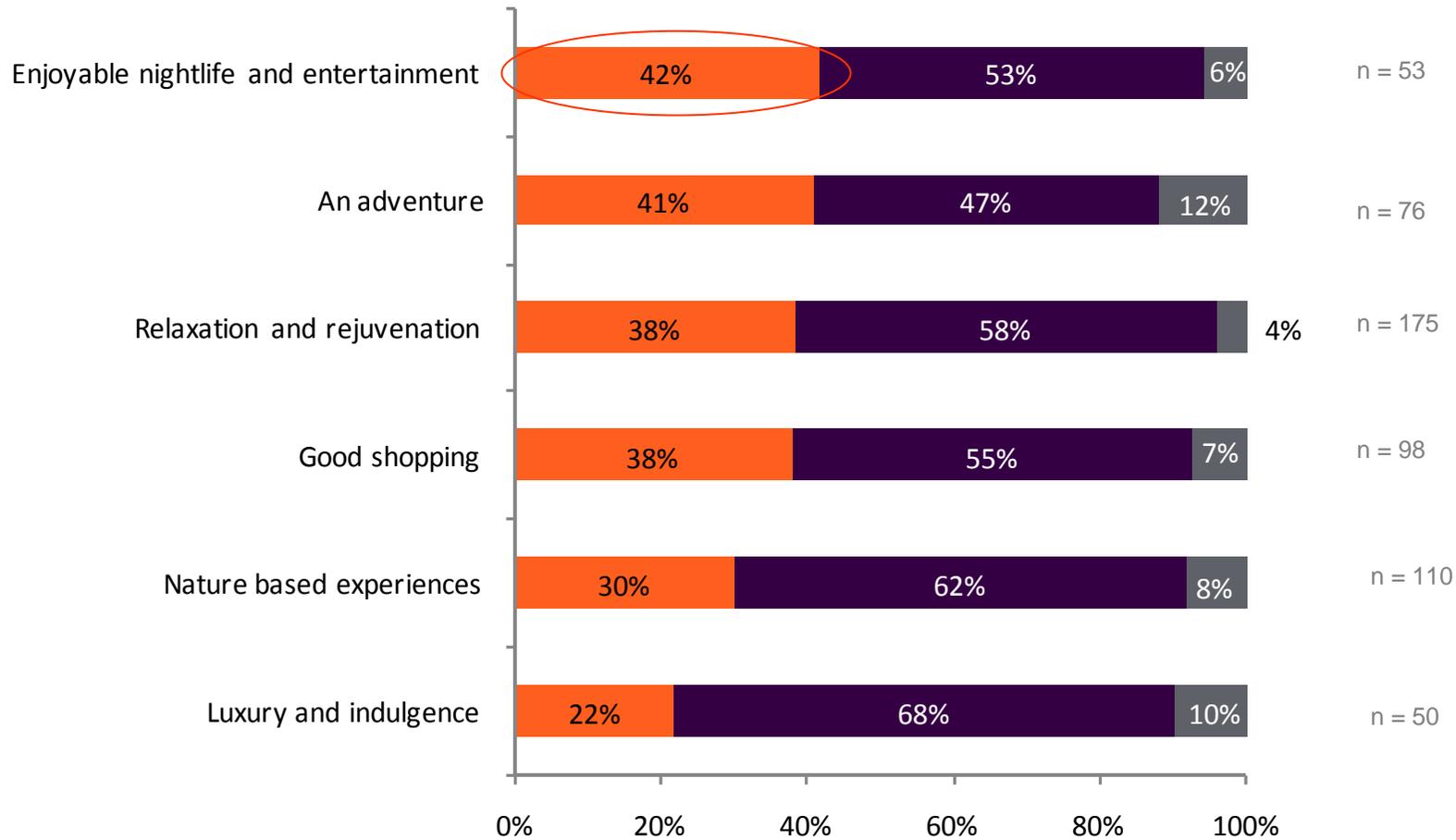


More than 3 points above the VPS benchmark

■ Better than expected ■ As expected ■ Worse than expected

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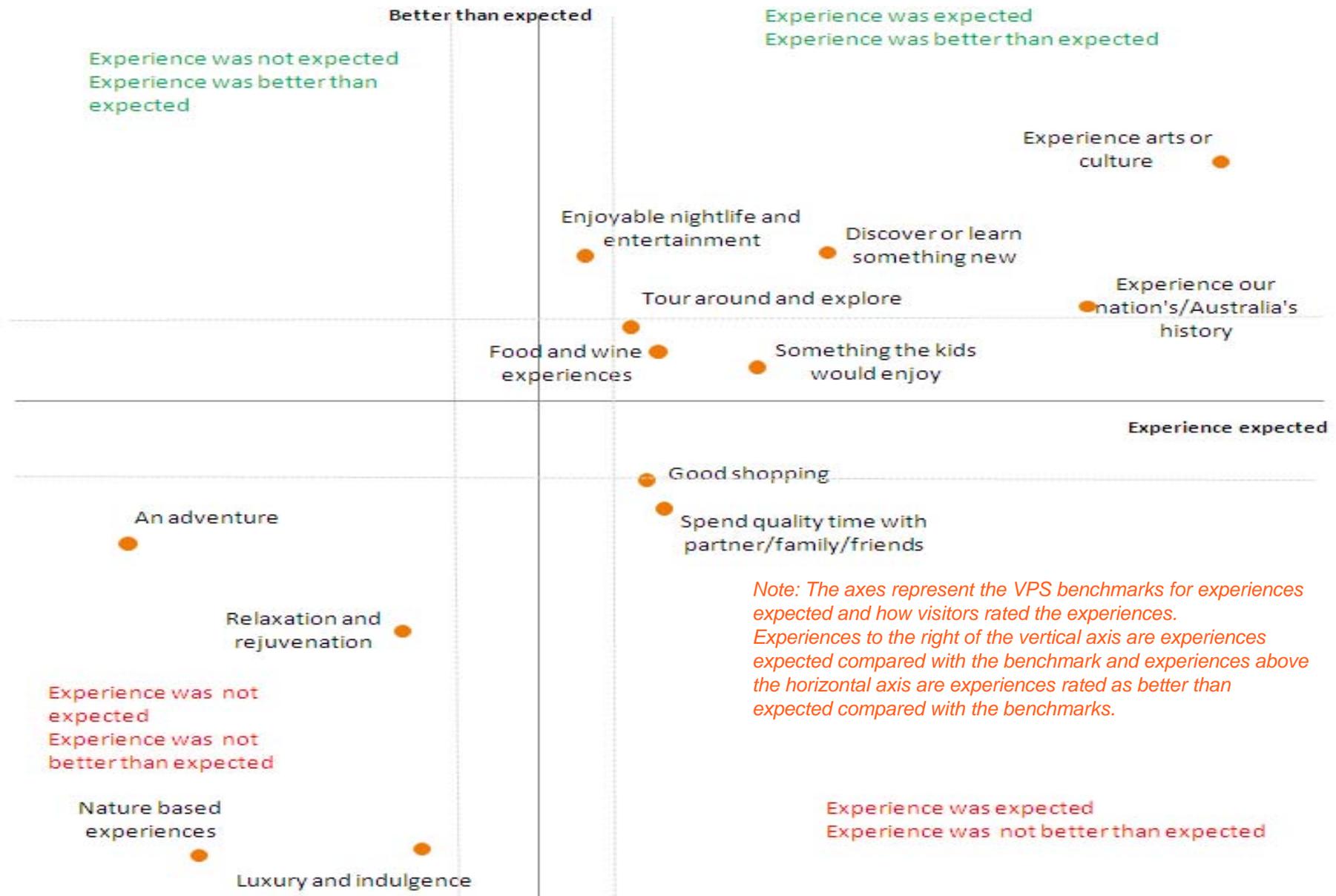
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More than 3 points above the VPS benchmark

■ Better than expected ■ As expected ■ Worse than expected

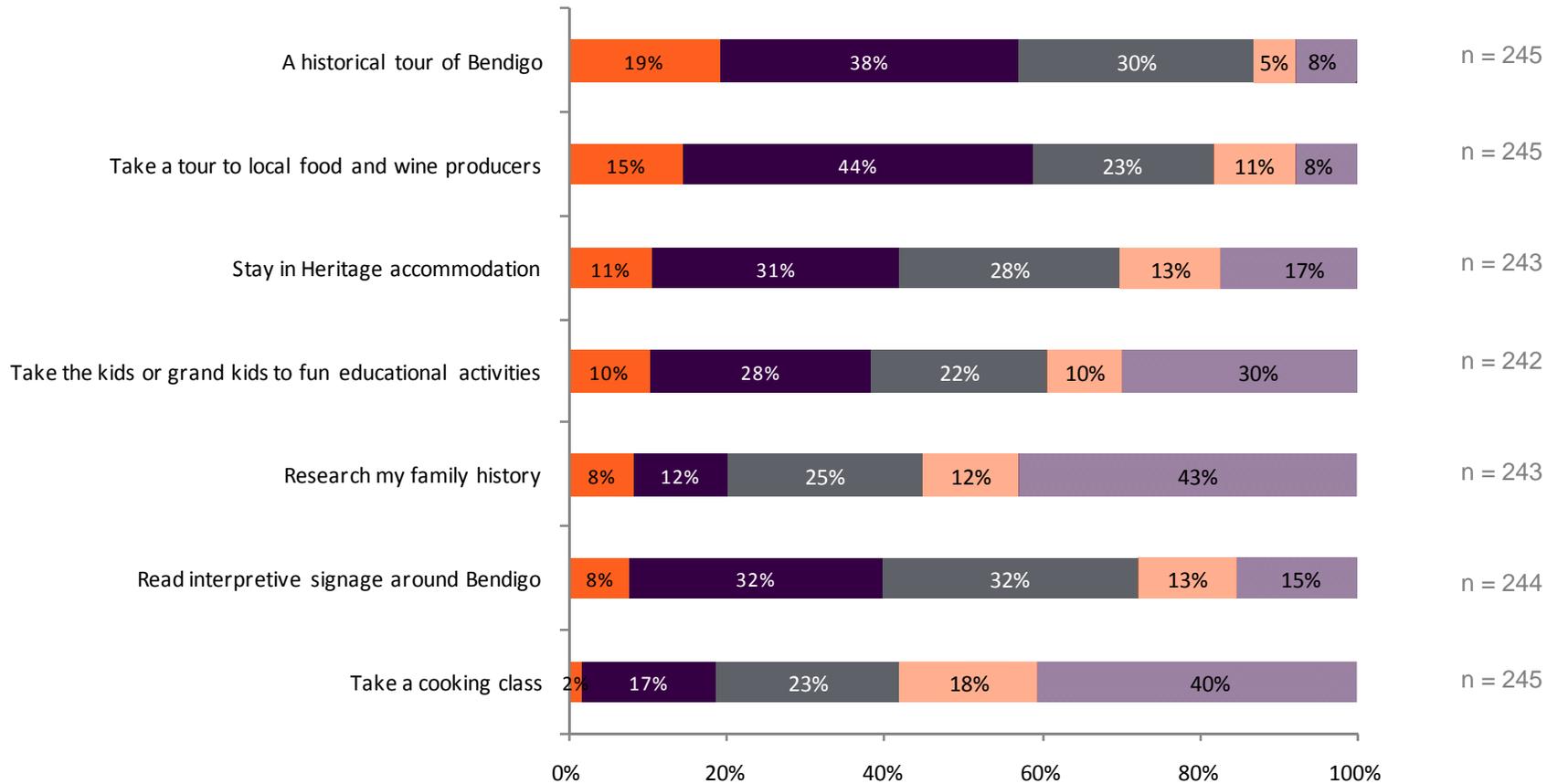
“Which, if any, of the experiences listed below did you expect Bendigo to offer? If you answer YES, please indicate how well the region met this expectation.”



Note: The axes represent the VPS benchmarks for experiences expected and how visitors rated the experiences. Experiences to the right of the vertical axis are experiences expected compared with the benchmark and experiences above the horizontal axis are experiences rated as better than expected compared with the benchmarks.

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

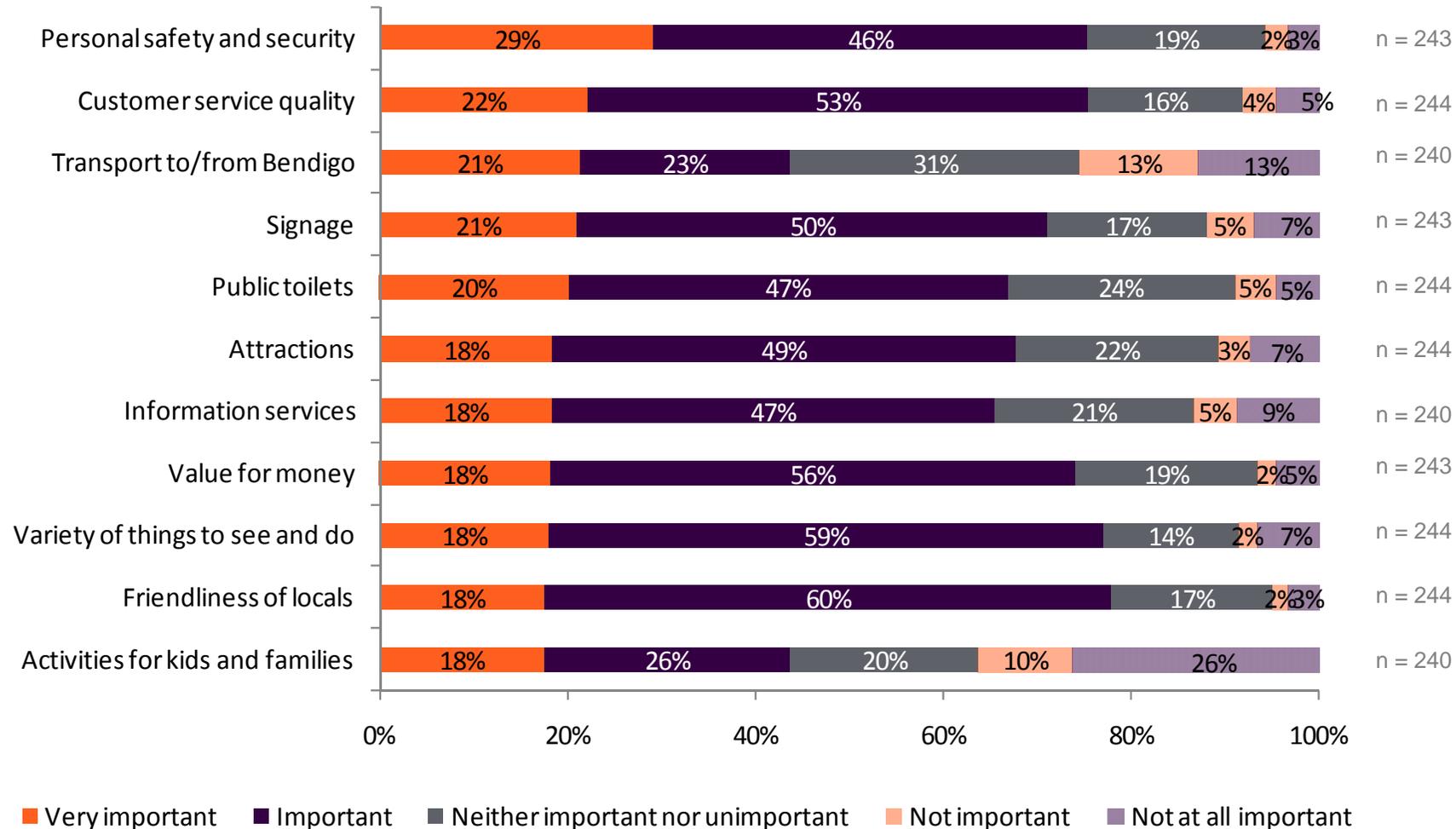
The majority of visitors were interested in tours around history and food and wine



- 10 - Very interested/ definitely something I would do
- 6 to 9 - More interested
- 5 - Interested/ May or may not do
- 2 to 4 - Less interested
- 1 - Not interested/ definitely would not do

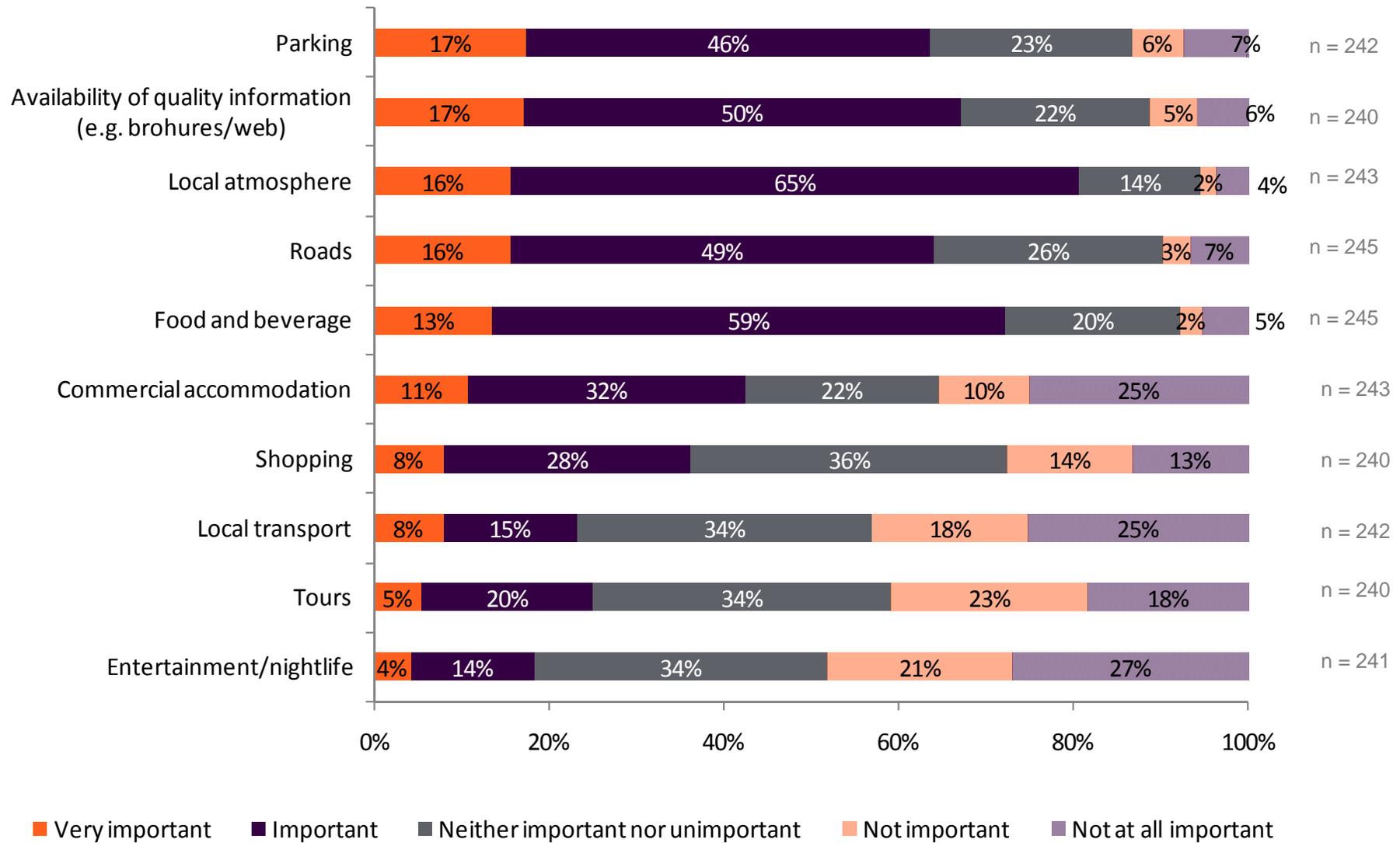
“Listed below are some general ideas that we’d like to get your feedback on. Can you please give us an idea of your level of interest and likelihood of participating in the following experiences on a trip to Bendigo?”

Personal safety and customer service were most important to visitors



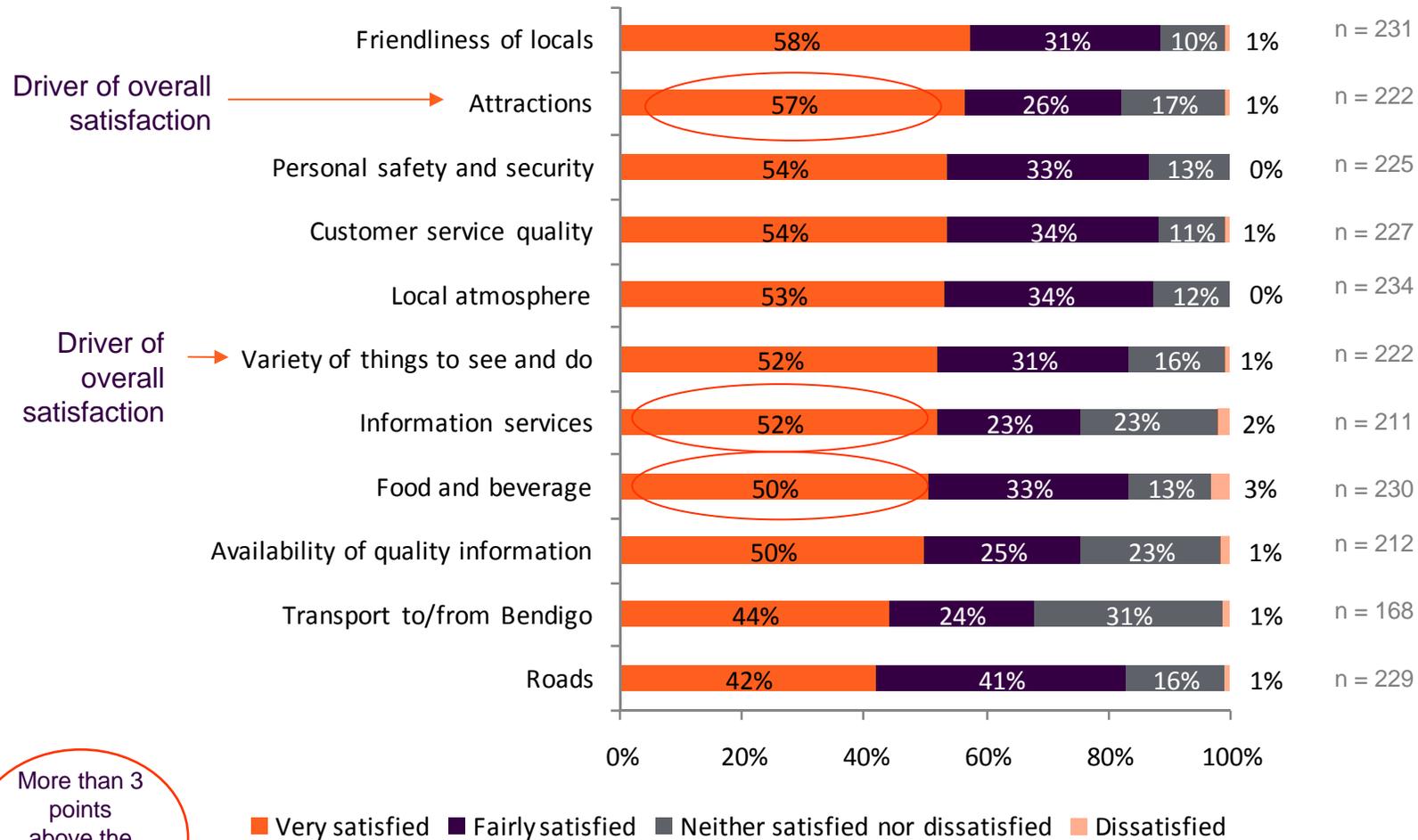
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"Again, thinking about your most recent trip to Bendigo, how important or unimportant was ..."

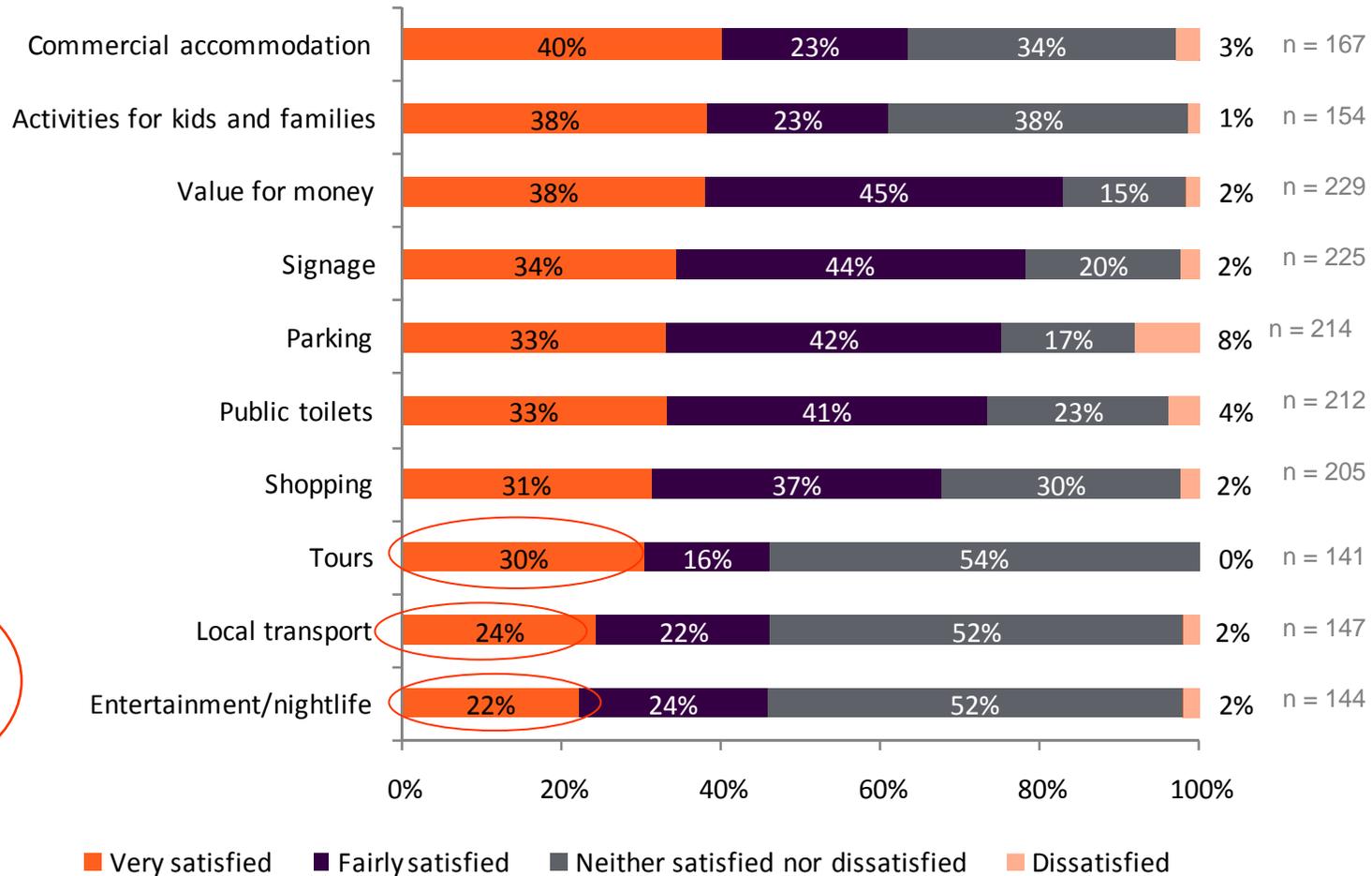
Visitors were most satisfied with the friendliness of the locals and the attractions



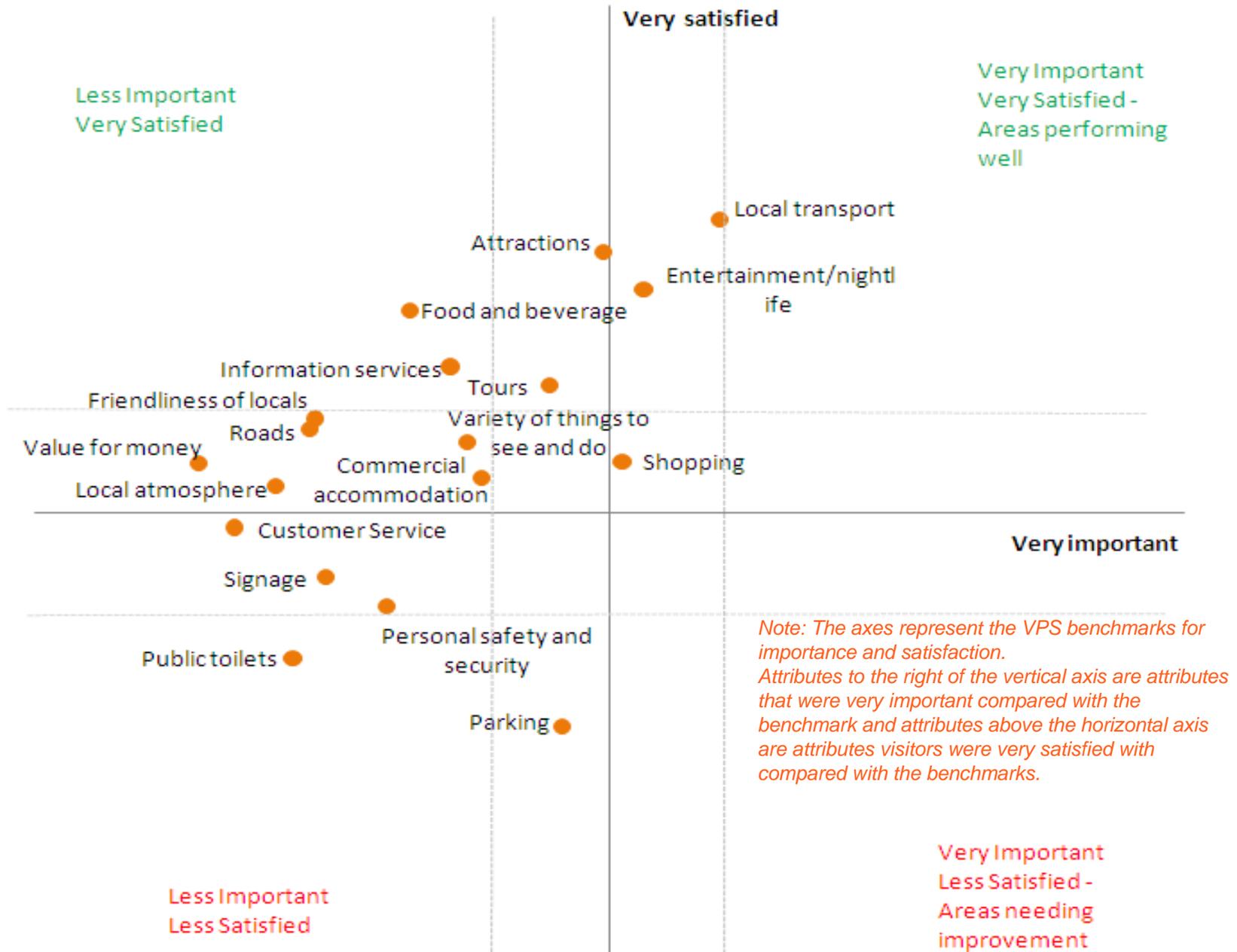
More than 3 points above the VPS benchmark

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



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

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

Visitors were happy with the variety of things to do

- *'Chinese Museum and Joss House, Arts Gallery, Botanical Gardens, and the historic buildings.'* (45-54 years, First time visitor)
- *'Loved the natural attractions surrounding Bendigo - The parks, botanical gardens. Lake Eppaloch, Trentham Falls, Mount Franklin, Daylesford Lake, Mount Alexander.'* (55-64 years, Repeat visitor)
- *'Visiting the old buildings (day and night) especially the Catholic Cathedral. Bendigo Pottery was excellent. National/State parks in the vicinity. Excellent markets at the showground.'* (55-64 years, First time visitor)
- *'Our family loved the Chinese gardens near Chinese Museum & feeding fish . The public park and playground was wonderful for family activities. The highlight for us was Bendigo Pottery and the hands on activities for children in the school holidays.'* (25-34 years, First time visitor)
- *'Bendigo was an easy destination to visit with the family. The Lake was beautiful and the children had a great time running around. The Pottery centre was interesting and the children enjoyed watching the demonstration. Bendigo was a very pretty place.'* (35-44 years, Repeat visitor)

"What else about Bendigo were you particularly happy with on your recent visit?"

Visitors were happy with local atmosphere and friendliness of the locals

- *'The down to earth atmosphere and the feeling of being accepted in every corner of Bendigo makes me feel very relax and comfortable. There are a lot of attractions near (around an hour drive) the region.'* (45-54 years, Repeat visitor)
- *'Helpfulness of motel operator for tourist maps and ideas, Exceptional customer service at Tourist Information office, Enjoyable walk around city on weekend with lots to see and no concerns about personal safety.'* (45-54 years, First time visitor)
- *'The fact that Bendigo was multi-cultural and I also loved the history the town had to offer. The town was untouched and the historic sites were well preserved. The people were very friendly.'* (45-54 years, First time visitor)
- *'A beautiful little city. Wonderful old buildings that are well preserved. Lots to do, good cafes, tours. A real experience of living history.'* (45-54 years, First time visitor)

"What else about Bendigo were you particularly happy with on your recent visit?"

Visitors were happy with the quality of the food and beverage

- *'Surprised by how friendly people were and the variety and quality of restaurants, bars and clubs' (35-44years, First time visitor)*
- *'Surprised by how good the restaurants and general quality of the food was.'* (25-34 years, Repeat visitor)
- *'There is lots to see and do and the quality of restaurants were great.'* (35-44 years, Repeat visitor)

"What else about Bendigo were you particularly happy with on your recent visit?"

Visitors were unhappy with lack of public facilities and services

- *'Lack of advice regarding parking fees. Should have been a notice on ticket machines advising if we had to pay. We paid but it would be nice for an Easter weekend to have free parking.'* (45-54 years, Repeat visitor)
- *'Parking - you need to attract people, not penalise them'* (55-64 years, Repeat visitor)
- *'Having to pay for parking around town when we went out'* (55-64 years, First time visitor)
- *'Lack of Disabled parking.'* (45-54 years, Repeat visitor)
- *'Lack of public toilets. Cost of parking on public streets.'* (25-34 years, Repeat visitor)
- *'Lack of public toilets in main Bendigo'* (45-54 years, Repeat visitor)
- *'Parking is always a problem around the CBD, and the local youth hanging around the mall is a put off , don't like shopping around there anymore.'* (45-54 years, Repeat visitor)

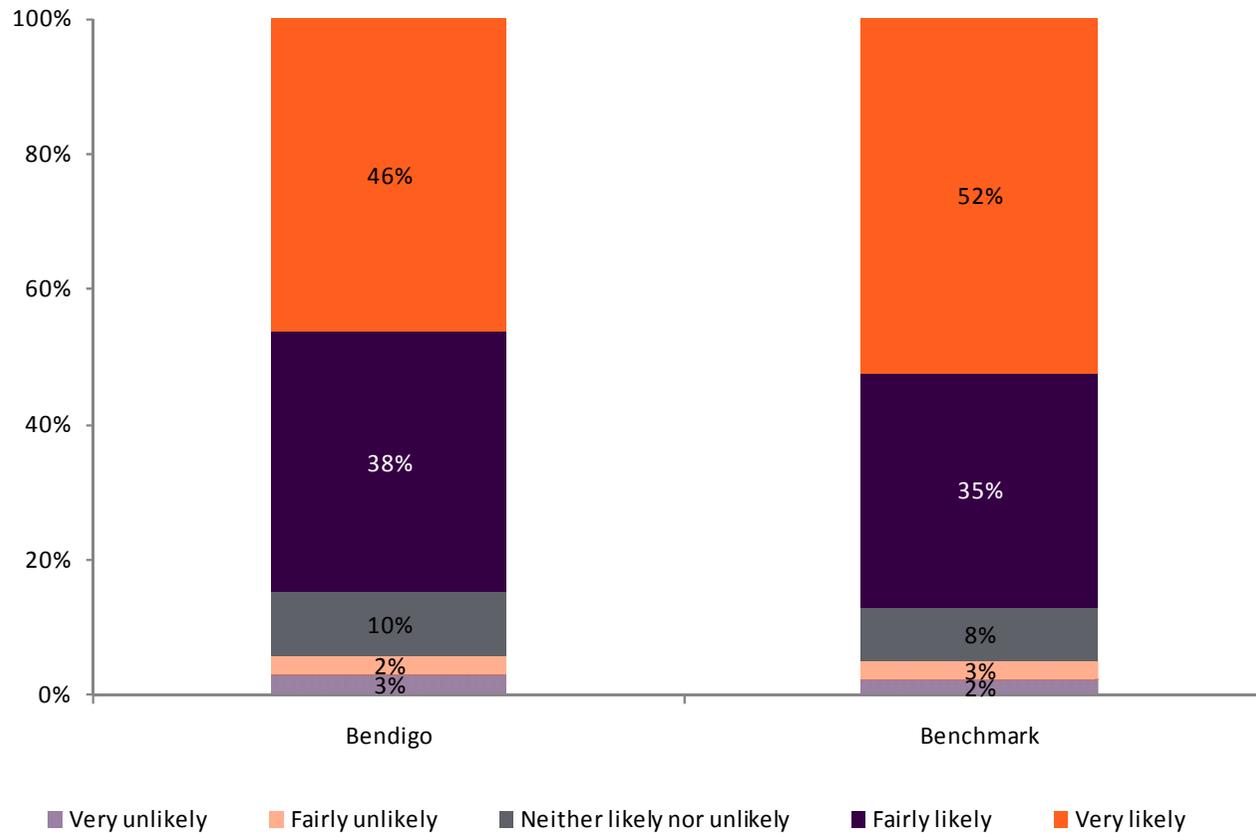
"What else about Bendigo were you particularly unhappy with on your recent visit?"

Visitors were unhappy with lack of public facilities and services

- *'Need more public transport services, reduce the impact of cars on the location. Pall Mall needs to be regenerated.'* (15-24 years, Repeat visitor)
- *'As a student with no car, the bus systems stopped running early in the evenings. If the buses could run later in the night and more frequently that would have been MUCH more helpful.'* (15-24 years, First time visitor)
- *'Cost of tram very expensive - was the deciding factor in not using this service. Very disappointing that it is so expensive.'* (45-54 years, Repeat visitor)
- *'Many of shops were closed on Sunday.'* (55-64 years, Repeat visitor)
- *'Trying to buy presents to take home on a Sunday with no shops open.'* (55-64 years, Repeat visitor)

"What else about Bendigo were you particularly unhappy with on your recent visit?"

Visitors were less likely to recommend Bendigo compared with the benchmark

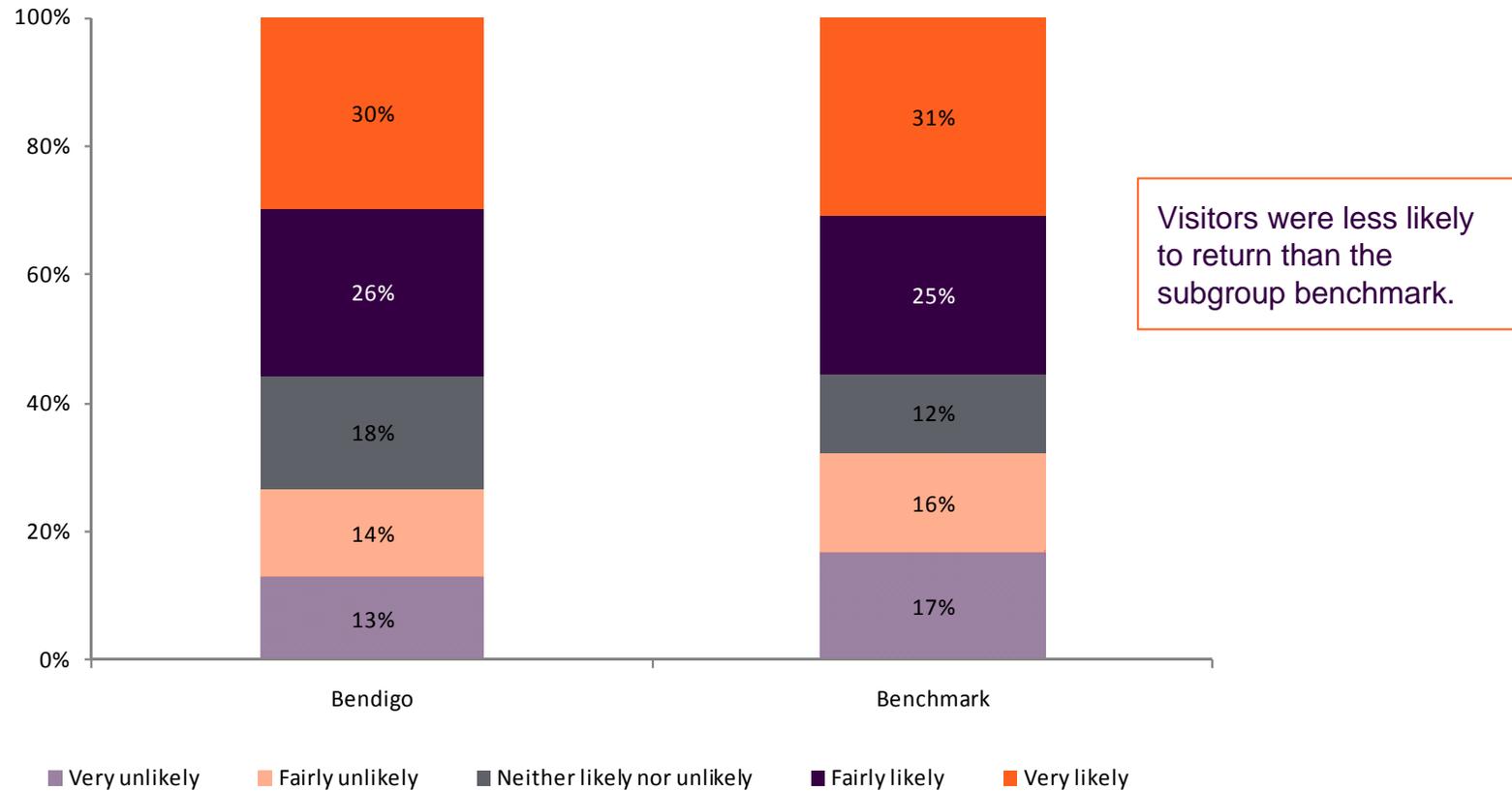


Key Metrics	Total Likely	V Likely	Total Unlikely
Recommend	85%	46%	6%
Difference to subgroup	→ -3%	↓ -7%	→ 1%
Difference to all	→ -2%	↓ -6%	→ 1%

Base =

"How likely are you to recommend Bendigo to other people as a destination to visit?"

Visitors were as likely to return in the next 12 months as the benchmark

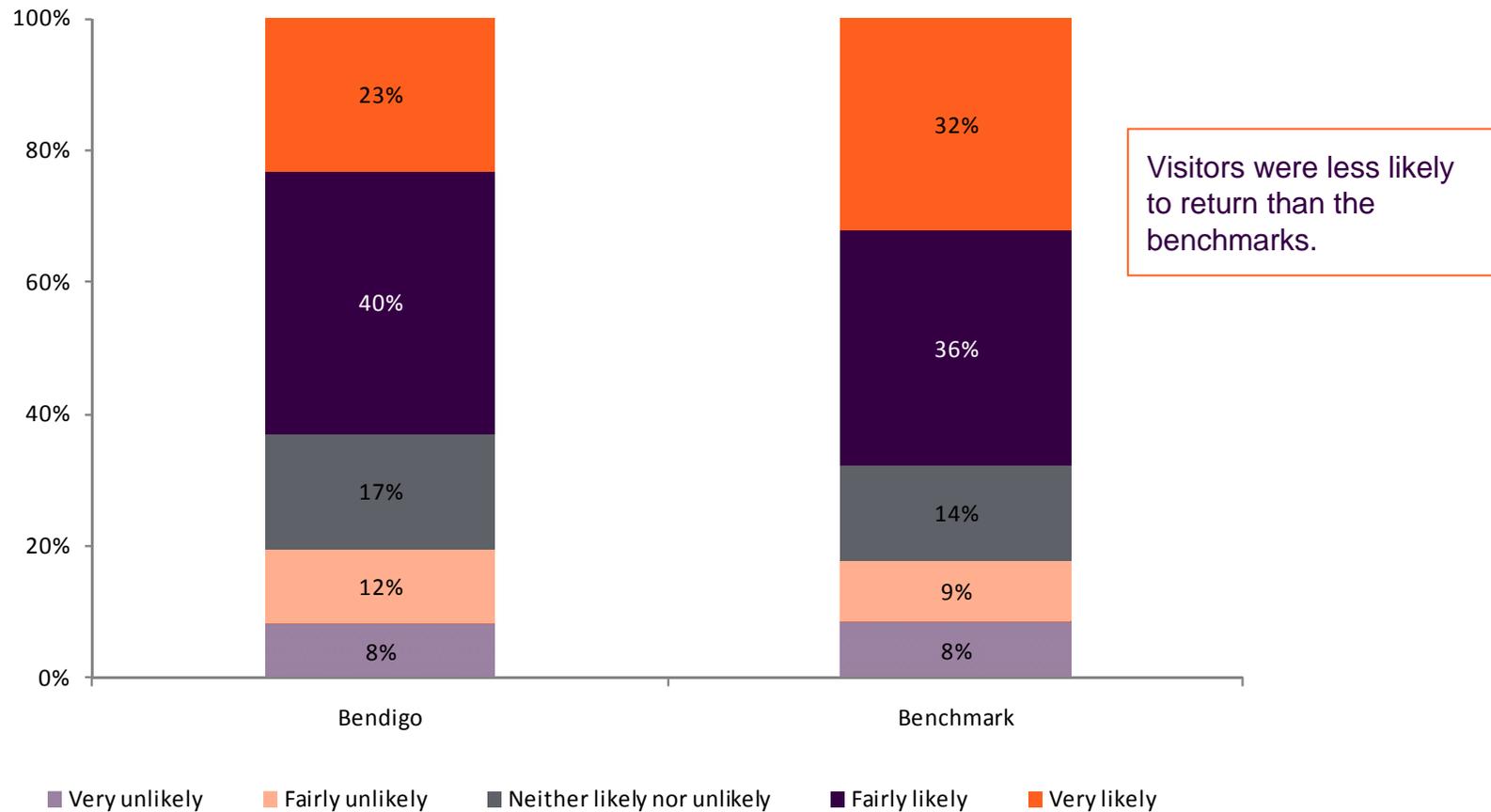


Likelihood to Return	Total Likely	V Likely	V Unlikely
... in 12 months	56%	30%	13%
Difference to subgroup	↓ -4%	↓ -4%	→ 0%
Difference to all	→ 0%	→ -1%	↓ -4%

Base =

"How likely are you to return to Bendigo in the next 12 months?"

More than six in ten visitors were likely to return in 3 years



Likelihood to Return	Total Likely	V Likely	V Unlikely
... in 3 years	63%	23%	8%
Difference to subgroup	↓ -8%	↓ -12%	→ 0%
Difference to all	↓ -5%	↓ -9%	→ 0%

Base = 173

"How likely are you to return to Bendigo in the next 3 years?"

Summary

- Nearly three in five visitors (58%) were very satisfied with their visit to Bendigo. This was a greater proportion than the VPS benchmark and a similar proportion to the sub group benchmark.
- Although most visitor segments were generally very satisfied with their visit, there was lower satisfaction for day visitors (47% very satisfied), those travelling alone (46%) and young/midlife life stages (45%) than visitors in general.
- Expectations were better than expected for discovering and learning something new (55% better than expected), experiencing our nation's/Australia's history (51%), experiencing arts or culture (49%) and enjoyable nightlife and entertainment (42%) compared with the sub group and VPS benchmarks.
- In terms of developing new experiences, the majority of visitors were interested in tours being developed around history (57%) and food and wine producers (59%).
- In terms of the functional attributes of the visit to Bendigo, personal safety and security and customer service were most important to visitors.
- The attractions and the variety of things to see and do were the main drivers of overall satisfaction with Bendigo.

Summary

- In terms of the most visited attractions, 72% of visitors to Golden Dragon Museum, 69% to Bendigo Pottery, 78% to Central Deborah Gold Mine/Talking Tram and 60% to Bendigo Art Gallery were very satisfied with the attractions in Bendigo.
- The satisfaction with attractions (57% very satisfied), information services (52%), food and beverage (50%), tours (30%), local transport (24%) and entertainment/nightlife (22%) were higher than the VPS benchmarks.
- The only attributes where satisfaction was lower than the benchmark were public toilets and parking. The issues around parking was mainly due to the cost in the CBD and the public toilets was around the lack of.
- About 85% of visitors were likely to recommend Bendigo, a similar proportion to the benchmarks.
- About 56% of visitors were likely to return to Bendigo in 12 months, a similar proportion to the VPS benchmark, but four percentage points lower than the sub group.

Appendix



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



TRA TOURISM
RESEARCH
AUSTRALIA

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



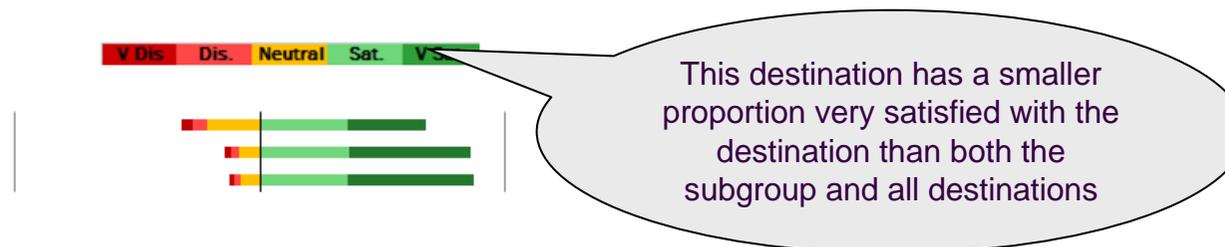
34% of respondents
travelled to the
region to visit
friends and relatives

That is 16
percentage points
more than the
subgroup

Benchmark summary

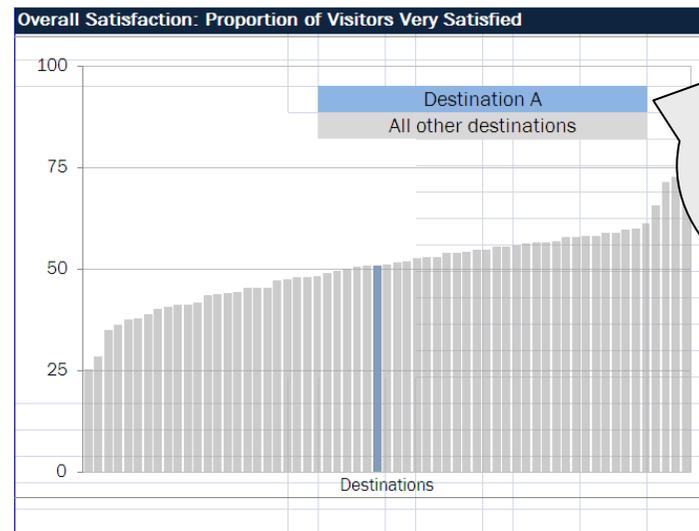
Bar charts: The small horizontal bar charts on the second page show the full results (that is all points on the scale) for the respective categories

- 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



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.