

# Goldfields Visitor Profile and Satisfaction Survey



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



**TRA** TOURISM  
RESEARCH  
AUSTRALIA

Tourism Research Australia  
GPO Box 1564  
Canberra ACT 2601  
Phone: 6243 7745  
Email: [tourism.research@ret.gov.au](mailto:tourism.research@ret.gov.au)  
Web: [www.ret.gov.au/tra](http://www.ret.gov.au/tra)



This work is licensed under a [Creative Commons Attribution 3.0 Australia licence](https://creativecommons.org/licenses/by/3.0/au/). To the extent that copyright subsists in third party quotes and diagrams it remains with the original owner and permission may be required to reuse the material.

This work should be attributed as *Ballarat Visitor Profile and Satisfaction Survey*, Tourism Research Australia, Canberra.

Enquiries regarding the licence and any use of work by Tourism Research Australia are welcome at [tourism.research@ret.gov.au](mailto:tourism.research@ret.gov.au)



# Table of Contents

	Page
<u>Background</u>	4
<u>Goldfields VPS project</u>	5
<u>Data collection</u>	6
<u>Survey sample</u>	7
<u>VPS benchmarks</u>	8
<u>Discussion of findings</u>	10
<u>Visitor and trip characteristics</u>	23
<u>Visitor profile</u>	24
<u>Trip planning and booking</u>	31
<u>Getting to and around the region</u>	43
<u>Staying in the region</u>	61
<u>Why they visited the region and were they happy</u>	67
<u>Reasons for visiting the region</u>	68
<u>What did they do in the region</u>	74
<u>Visitor satisfaction with the region</u>	78
<u>Appendix</u>	106



# Background



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

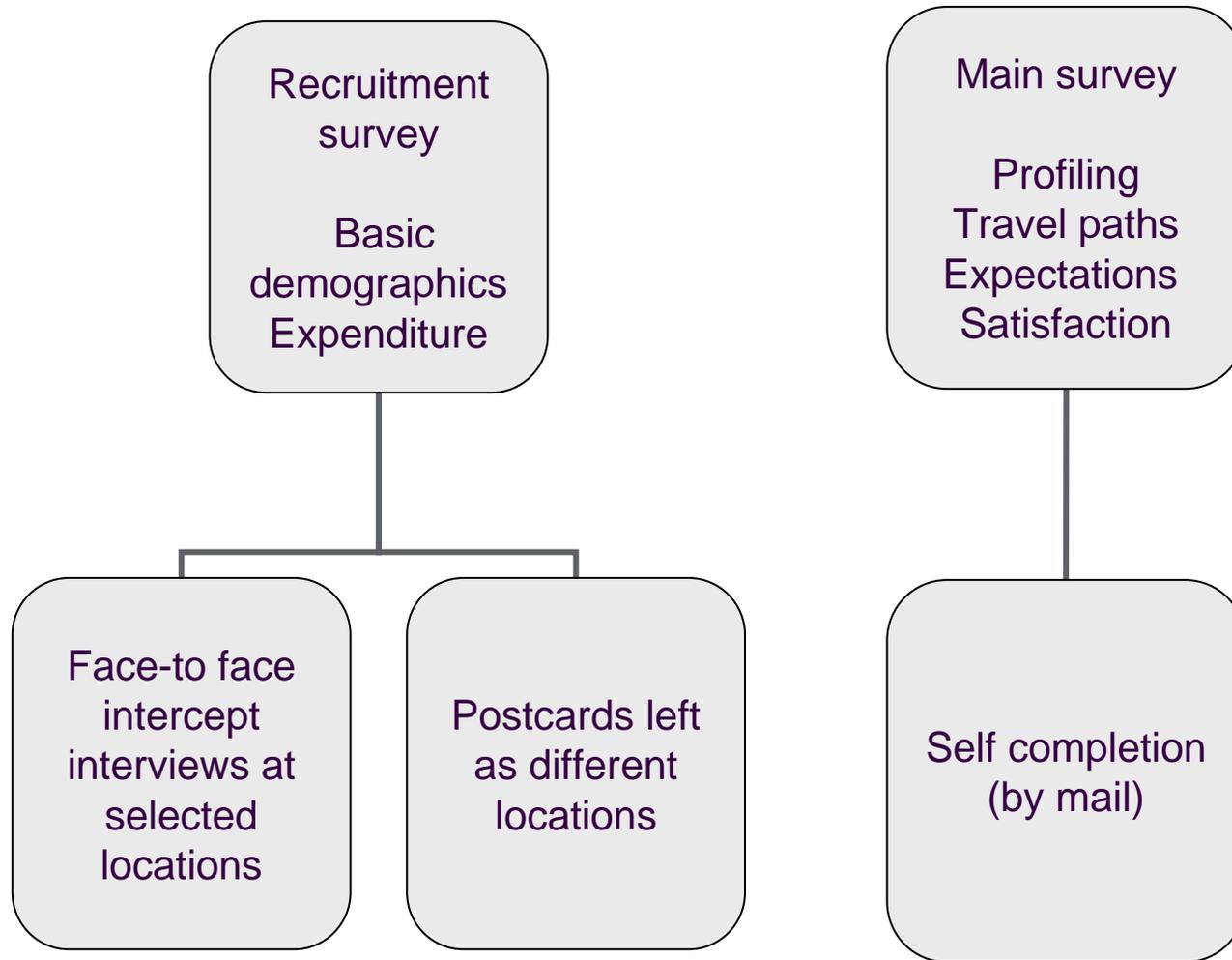


**TRA** TOURISM  
RESEARCH  
AUSTRALIA

# Goldfields VPS project

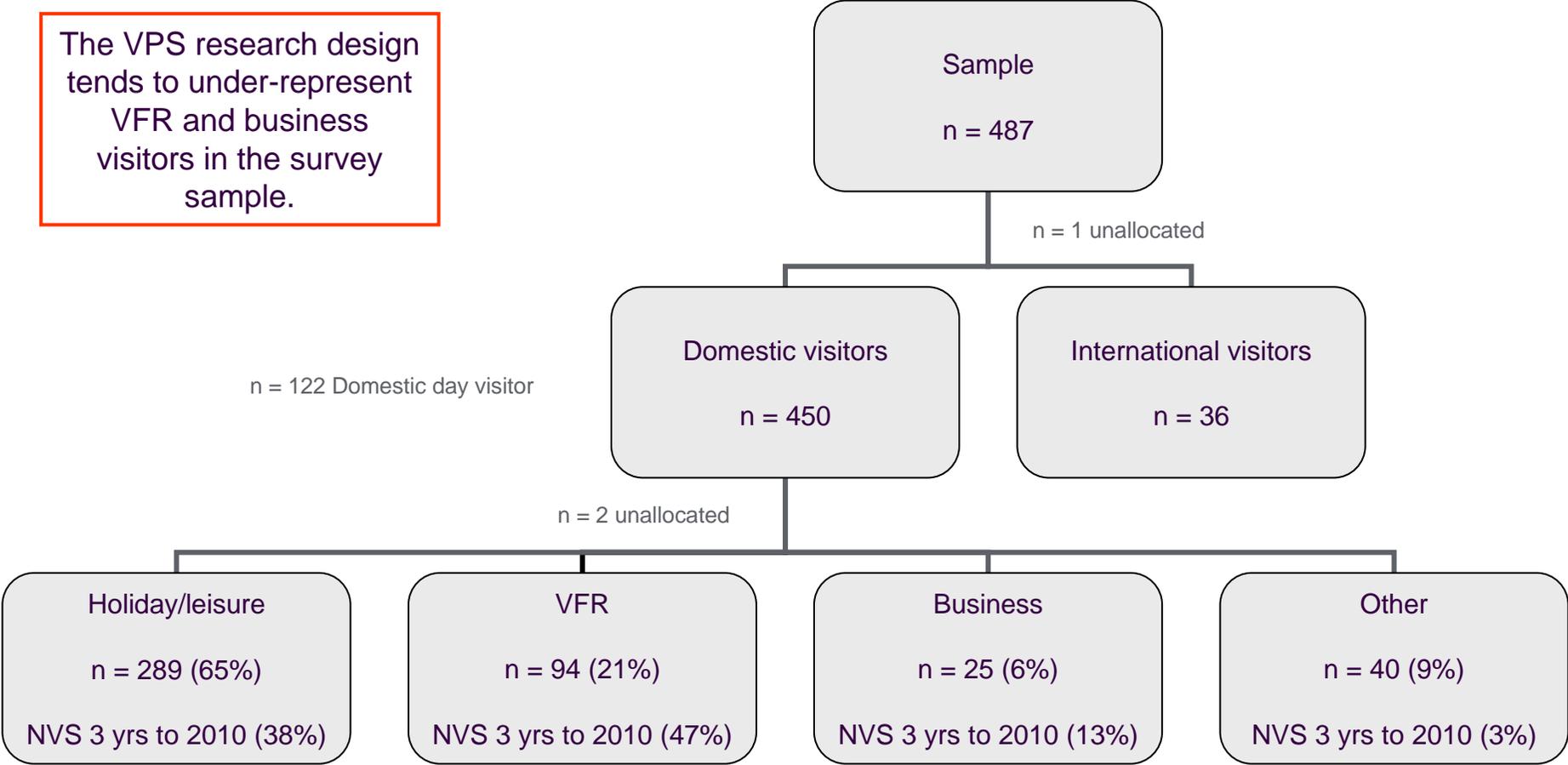
- The Goldfields Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (part of the Department of Resources Energy and Tourism).
- Respondents were recruited during their visit in Ballarat and Bendigo in March and April 2011.
- This report is a summary of the combined data collected in Ballarat and Bendigo. For more information on the individual results for Ballarat and Bendigo, refer to the separate Ballarat and Bendigo reports.

# 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. The Goldfields Benchmark Summary is available in conjunction with this report. This summary provides a full set of comparisons for Goldfields results against the benchmarks.

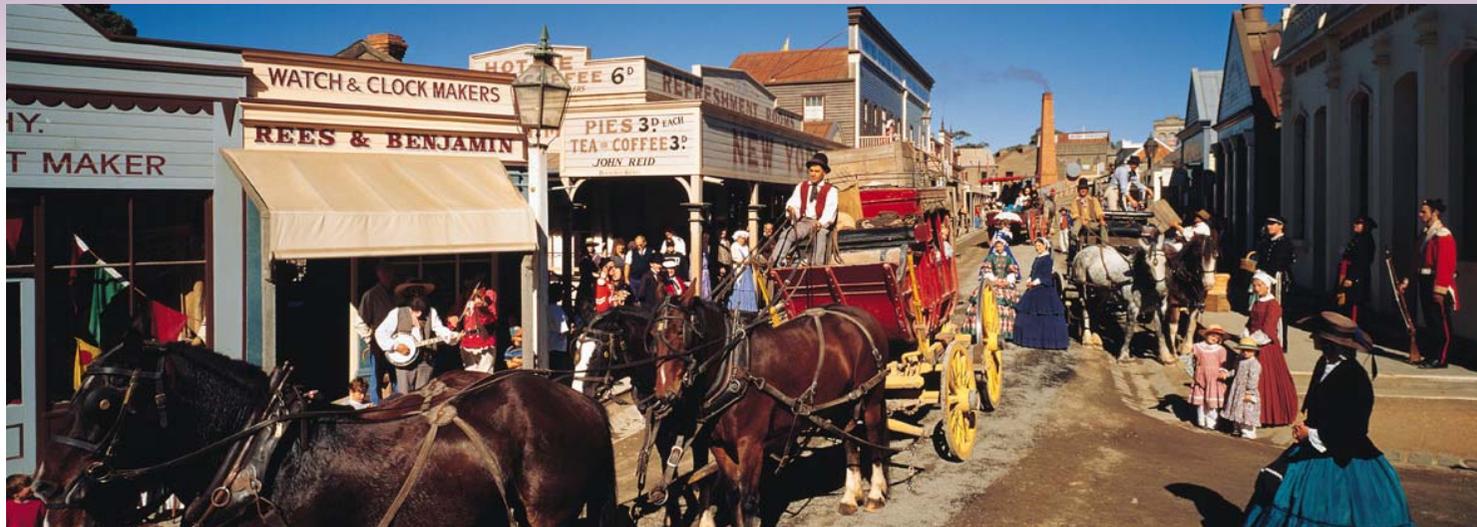
# VPS Benchmarks

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

- Albury Wodonga
- Ballarat
- Bendigo (2011 data)
- Daylesford Macedon Ranges
- Echuca
- Gippsland
- Grampians
- High Country
- Mildura
- Murrindindi
- Swan Hill

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

# Discussion of findings



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



**TRA** TOURISM  
RESEARCH  
AUSTRALIA

# Discussion of findings

## Introduction

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

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

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

# Discussion of findings

## Visitor and trip characteristics

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

- The highest proportions of visitors were in the family life stage (41%) and older life stages (20% older working and 25% older non-working), with 34% travelling with their immediate family and 34% with their partner.
- The majority of visitors (56%) travelled to the region for holiday/leisure purpose. A fifth (21%) travelled to visit friends and relatives (VFR), eight points above the VPS benchmark. The proportion travelling for VFR purposes was driven by visitors to Bendigo with 28% of visitors to Bendigo travelling for this purpose.
- More than nine in ten visitors (93%) to the Goldfields were domestic visitors, with 62% from Victoria, mainly Melbourne.
- Visitors travelling to Bendigo for VFR purposes travelled with their immediate family (37%), partner (27%) or in a group with friends and/or relatives (21%) and 58% were from outside Victoria.
- Around three quarters of visitors (76%) to the Goldfields were repeat visitors, seven points above the VPS benchmark. The proportion of repeat visitors was similar for Ballarat and Bendigo.

# Discussion of findings

## Visitor and trip characteristics cont.

- Nearly half of visitors (49%) to the Goldfields used the internet for information and 38% used it for bookings. Accommodation operator sites were the most commonly used sites for both information and booking and were considered the most useful by 27% of visitors.
- There were a significantly higher proportion of visitors to Ballarat who used the internet for information (59%) compared with Bendigo (39%).
- Nearly three in ten visitors (29%) visited the Goldfields on a day trip. The proportion was driven by visitors to Ballarat with a third of visitors in Ballarat for a day trip.
- Day visitors to Ballarat were more likely to be in the young/midlife couple (no kids) life stage and from Victoria than the overnight visitors.
- The majority of overnight visitors to the Goldfields stayed one or two nights (56%), with the median stay being two nights.

# Discussion of findings

## Visitor and trip characteristics cont.

- Over a quarter of visitors to the Goldfields (26%) stayed in standard hotels/motels, 20% in commercial caravan or camping grounds, 18% with friends and/or relatives and 16% in luxury hotels/resorts.
- Visitors to Ballarat were more likely to stay in commercial accommodation including standard and luxury hotels and motels and commercial caravan or camping grounds, compared to visitors to Bendigo who stayed with friends and/or relatives.
- The majority of visitors only stopped overnight in one town in the Goldfields – 66% of visitors to Ballarat and 86% of visitors to Bendigo did not stay overnight anywhere else on their trip.
- The most commonly visited towns (including day visits) by those who visited Ballarat were Melbourne (25%), Daylesford (20%), Creswick (14%), Geelong (13%), Bendigo (10%) and Warrnambool (10%). The most common towns stopped at by those who visited Bendigo were Castlemaine (27%), Ballarat (13%), Daylesford (12%), Heathcote (11%) and Echuca (11%).

# Discussion of findings

## Motivations for visiting the Goldfields

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

In addition to these motivations:

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

# Discussion of findings

## **Motivations for visiting the Goldfields cont.**

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

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

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

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

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

# Discussion of findings

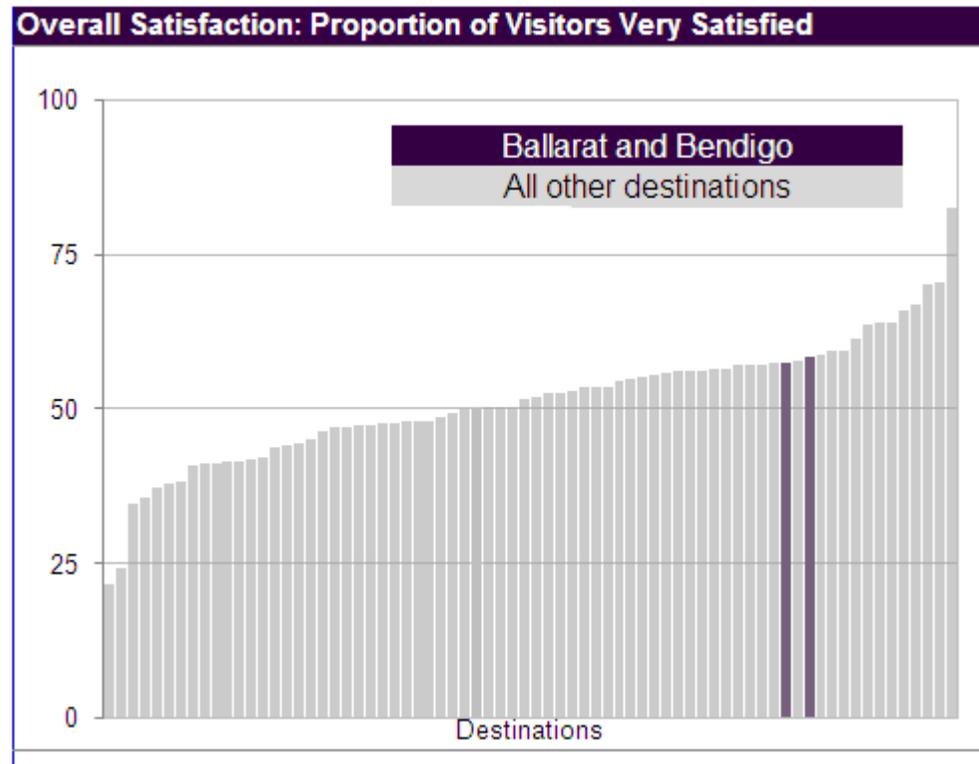
## **Motivations for visiting the Goldfields cont.**

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

# Discussion of findings

## Satisfaction with the Goldfields

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



# Discussion of findings

## **Satisfaction with the Goldfields cont.**

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

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

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

The satisfactions with these attributes as well as all other attributes benchmarked were above or similar to the VPS benchmarks, a result not achieved by many destinations who have participated in the VPS program.

# Discussion of findings

## **Satisfaction with the Goldfields cont.**

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

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

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

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

# Discussion of findings

## Recommendations

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

### 1. Stimulating consumer demand

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

### 2. Improving product and service delivery

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

# Discussion of findings

## Recommendations cont.

### 3. Product development and diversification

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

# Visitor and trip characteristics



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

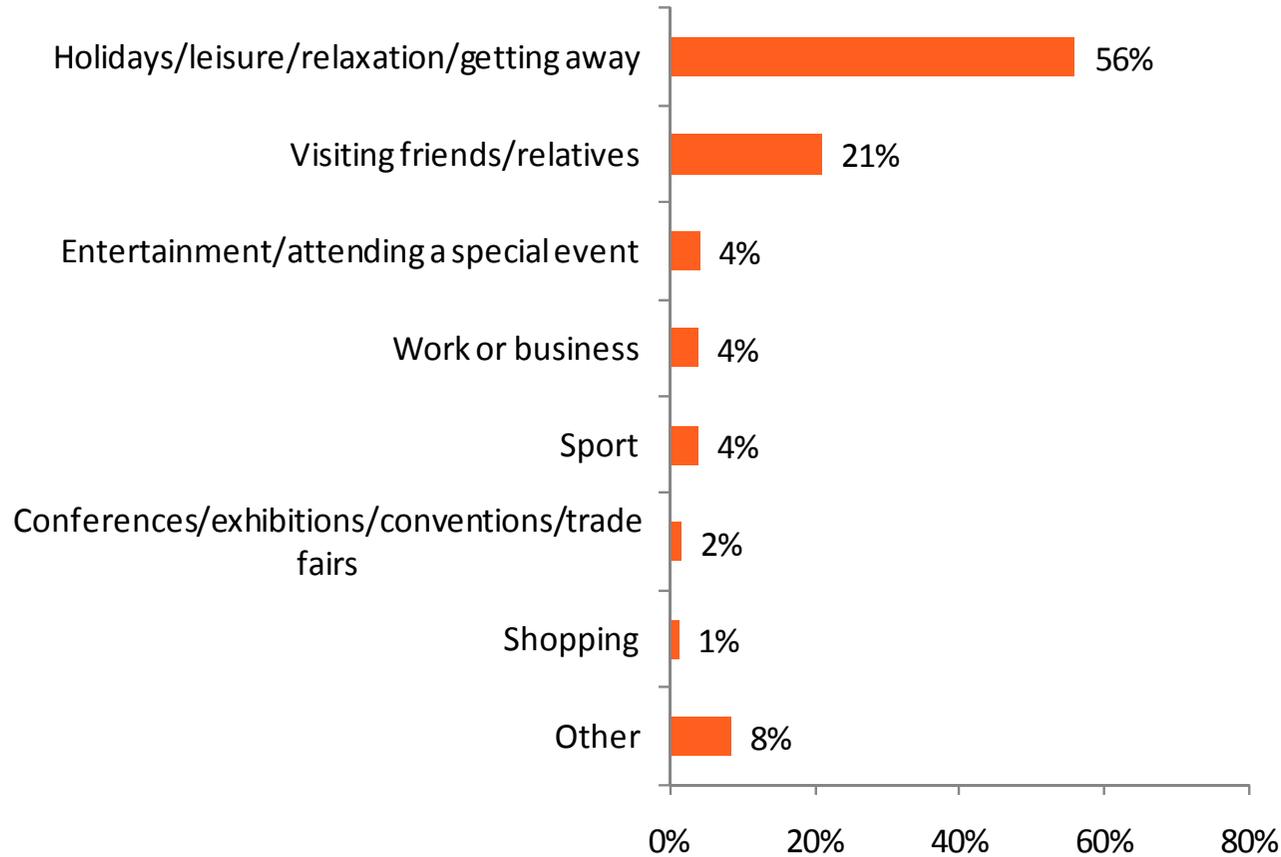


**TRA** TOURISM  
RESEARCH  
AUSTRALIA

## Visitor profile (during the survey period)

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

# Visitors travelled to the Goldfields for a holiday or to visit friends and relatives



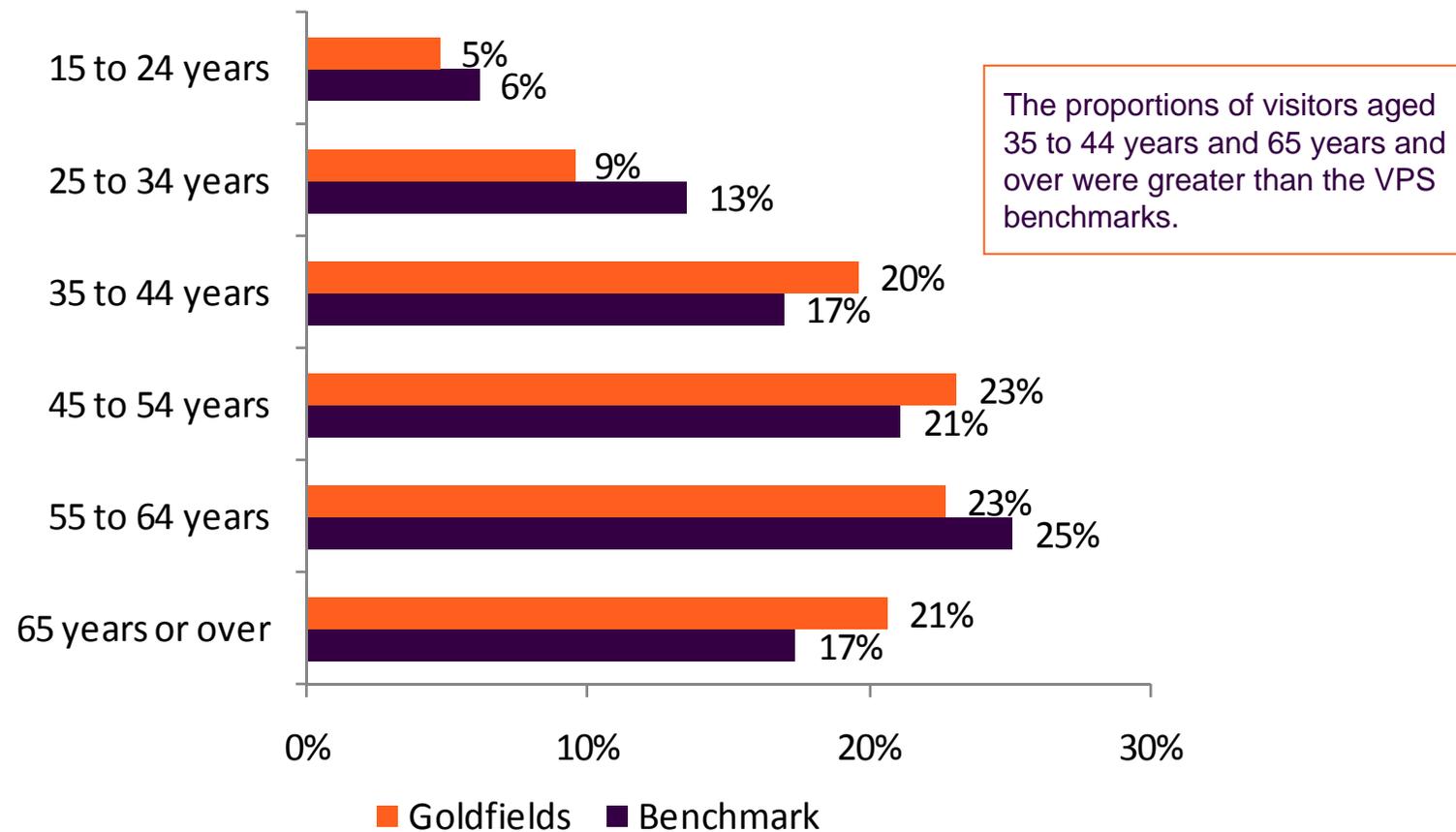
Purpose	Gold	Subgroup	All
Holiday	65%	↓ -10%	↓ 12%
Visiting friends and relatives	21%	↑ 8%	↑ 8%
Business	6%	→ 1%	→ 1%
Other	8%	→ 2%	→ 3%

The proportion who travelled to visit friends and relatives was greater than the benchmarks. This was driven by a high proportion of VFR visitors to Bendigo.

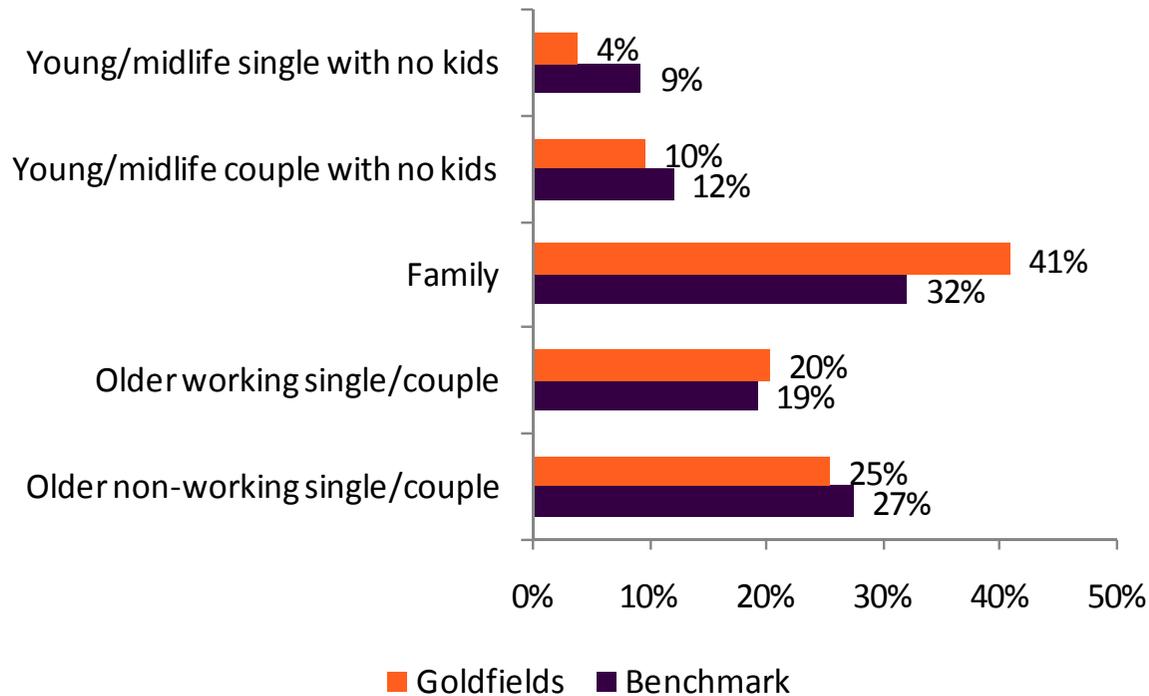
Base = 485

*'What was the main purpose of the trip?'*

# The majority of visitors were aged 45 years and over



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



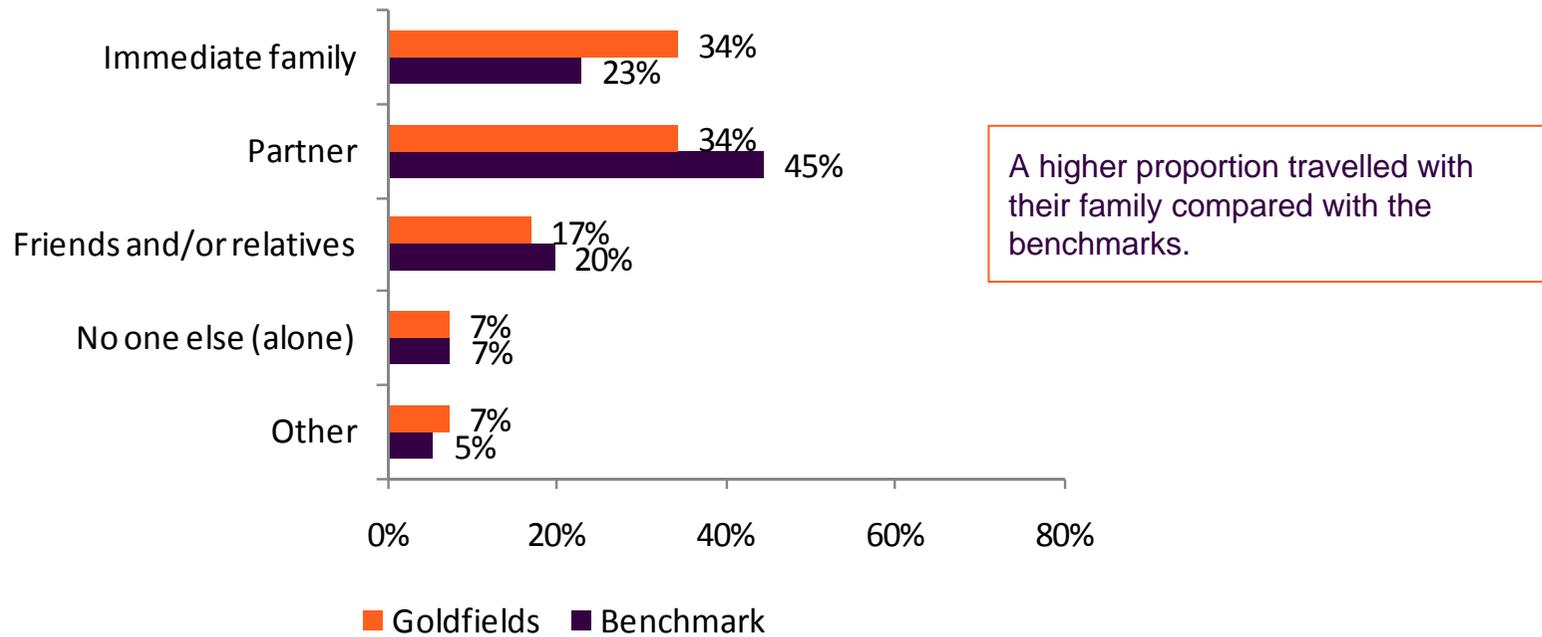
There was a greater proportion of visitors in the family life stage compared with the benchmarks.

Life Stage	Gold	Subgroup	All
Young/midlife single	4%	→ -1%	↓ -5%
Young/midlife couple	10%	→ -1%	→ -3%
Family	41%	↑ 5%	↑ 9%
Older working	20%	→ 1%	→ 1%
Older not working.	25%	↓ -4%	→ -2%

Base = 468

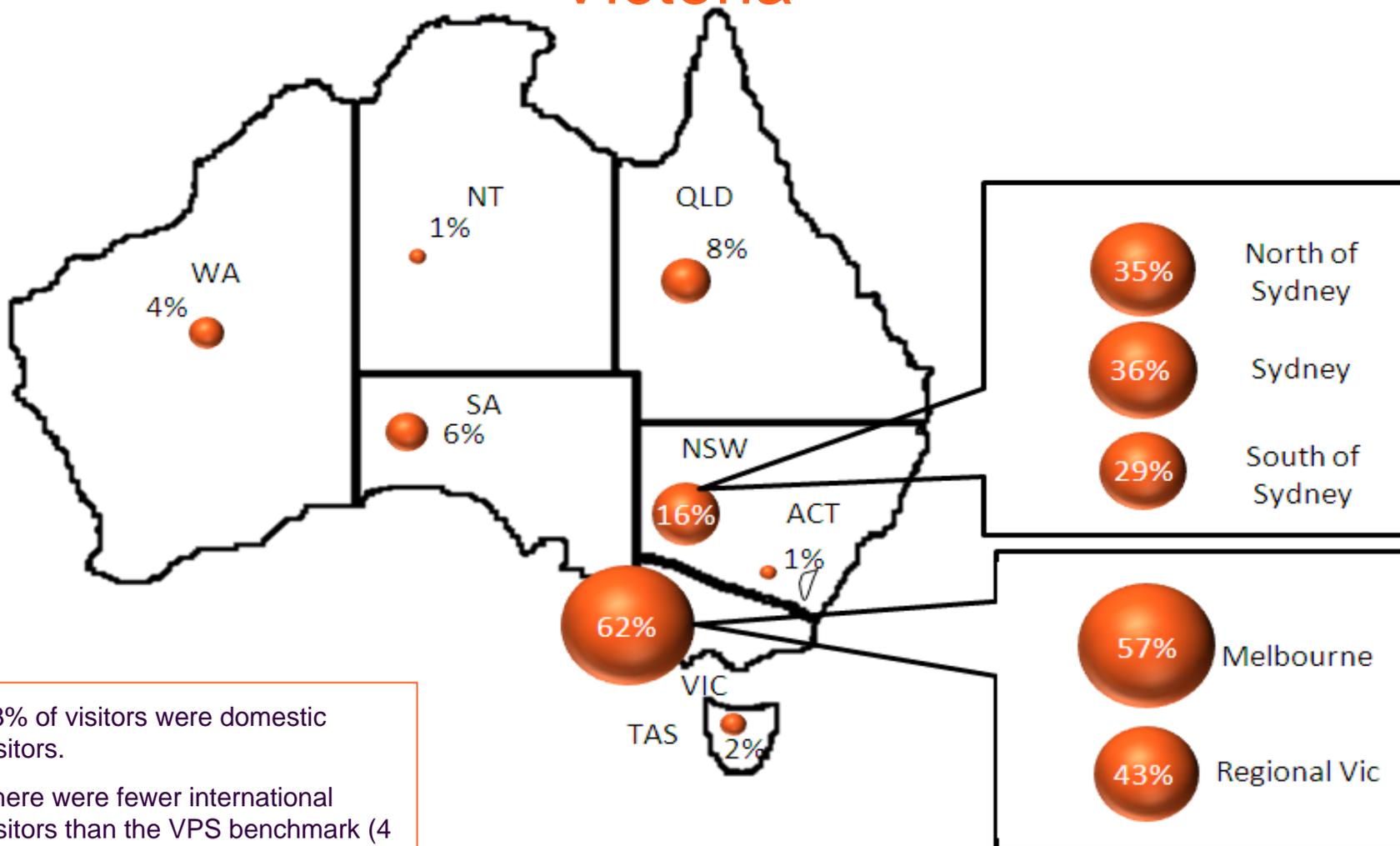
Derived variable from demographic questions

# Visitors travelled with their immediate family or partner



Travel Party	Gold	Subgroup	All
Alone	7%	→ 2%	→ 0%
Couple	34%	↓ -12%	↓ -10%
Family	34%	↑ 10%	↑ 11%
Friends or relatives	17%	→ -2%	→ -3%
Other	7%	→ 2%	→ 2%

# The majority of 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 (3 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 = 450

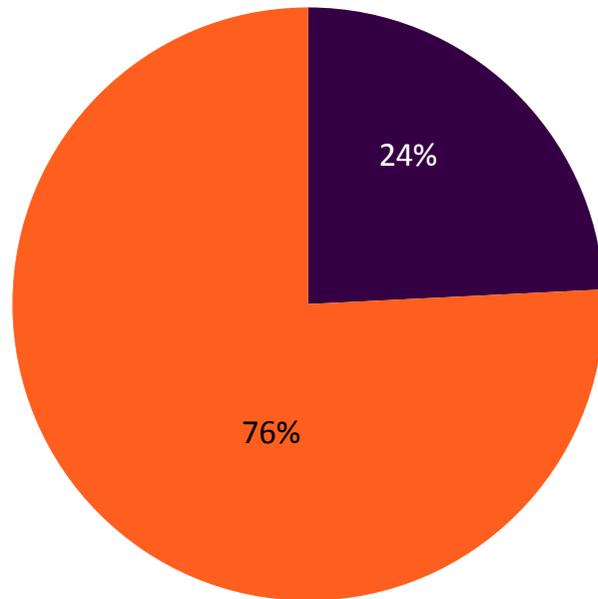
# Summary

- Just over half of visitors (56%) travelled to the region for holiday/leisure purpose, with 21% also travelling to visit friends and relatives (VFR). The proportion of VFR visitors was above the benchmarks.
- The majority of visitors (86%) were aged 35 years and over. The proportion between 35 and 54 years and 65 years and over were higher than the VPS benchmarks.
- The majority of visitors were in the family (41%) and older life stages (20% older working and 25% older non-working). The proportion in the family life stage was above the VPS benchmark.
- The highest proportion of visitors either travelled as a family (34%) or with their partner (34%). The proportion travelling with their family was above the benchmarks.
- More than nine in ten visitors (93%) were domestic visitors.
- Six in ten domestic visitors (62%) 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

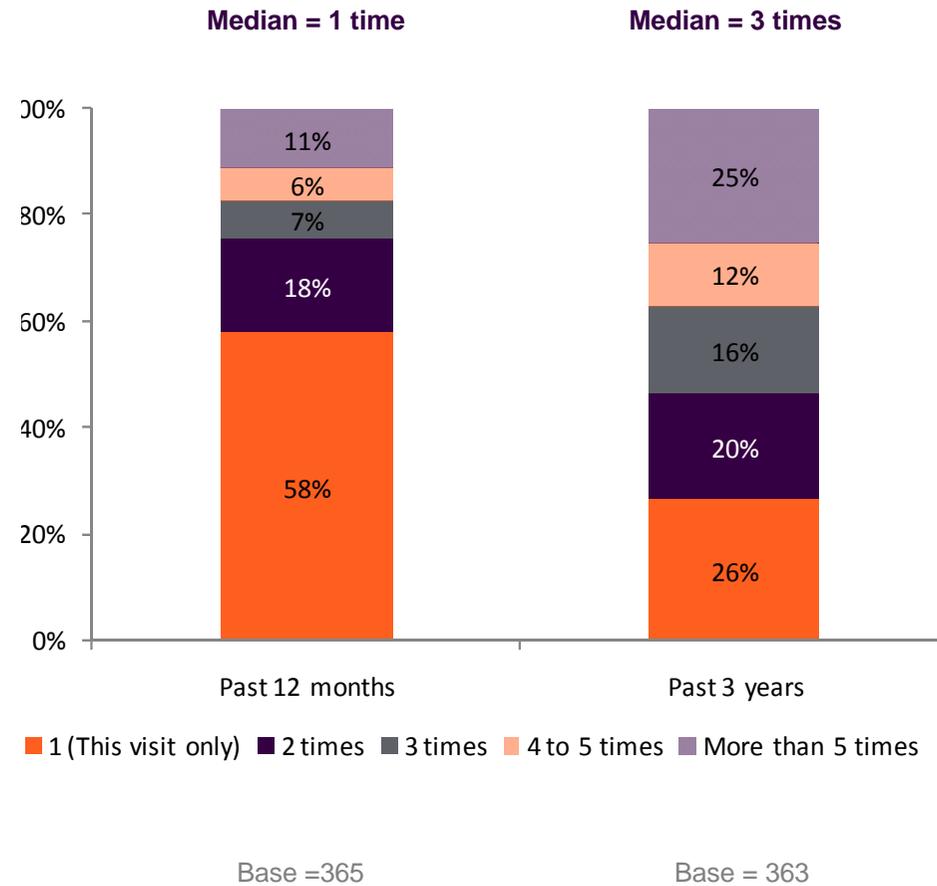


Base = 483

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

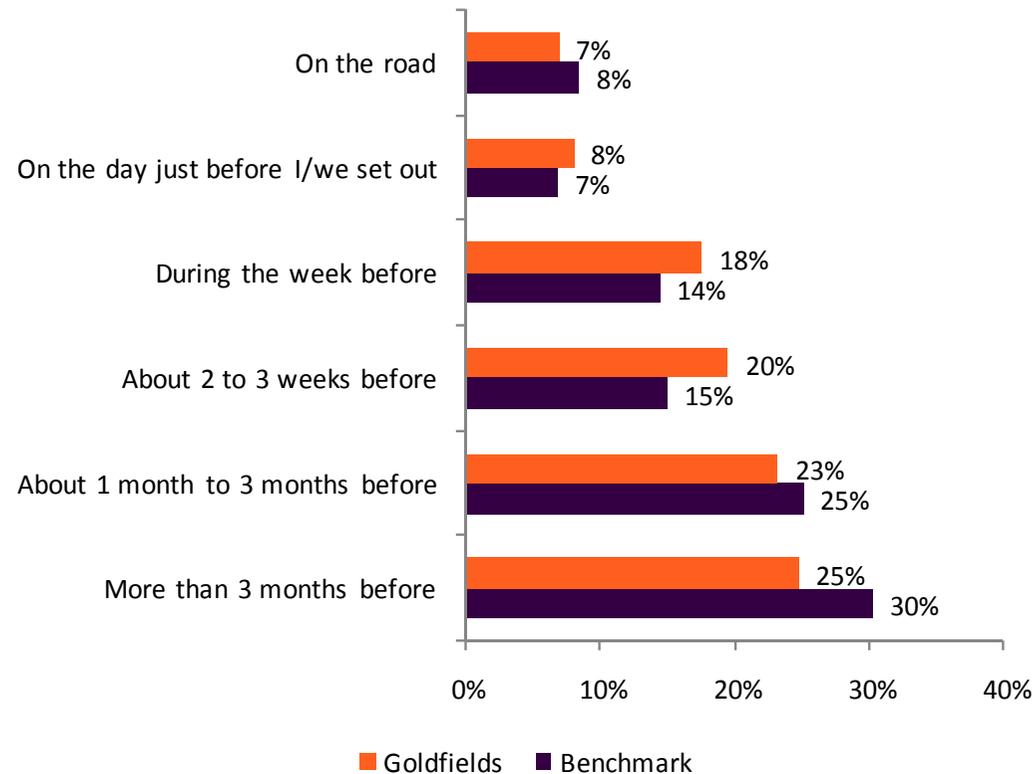
- The proportion of repeat visitors is similar to the subgroup benchmark (76%).
- 87% of VFR visitors were repeat visitors compared with 71% for holiday/leisure visitors.

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



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

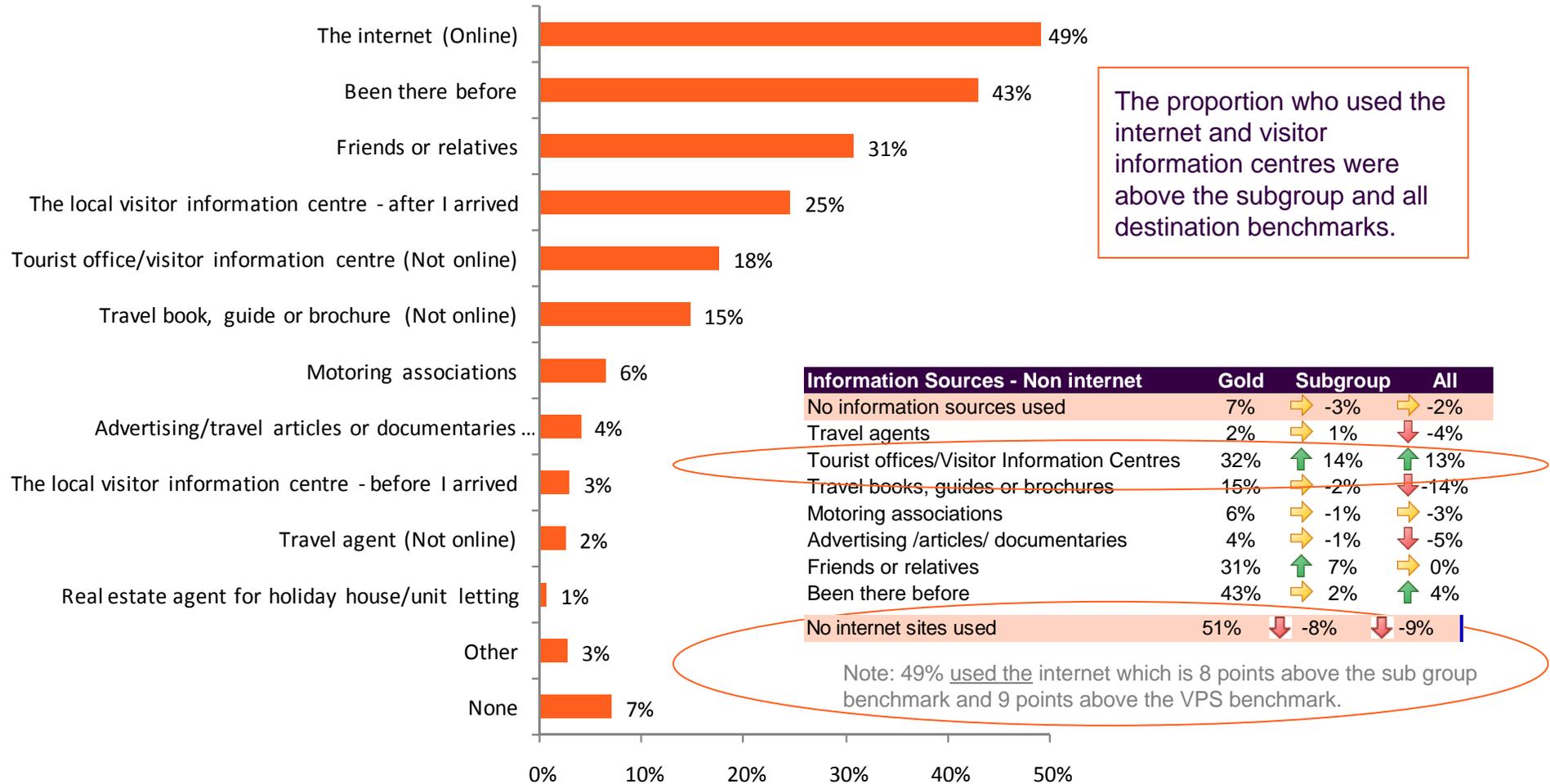
# The planning period for visitors was generally shorter compared with the VPS benchmark



Trip Planning	Gold	Subgroup	All
On the road	7%	0%	-2%
In the month before	45%	2%	9%
1 to 3 months	23%	-2%	-2%
More than 3 months	25%	0%	-5%

The planning period pattern was similar to the subgroup benchmarks.

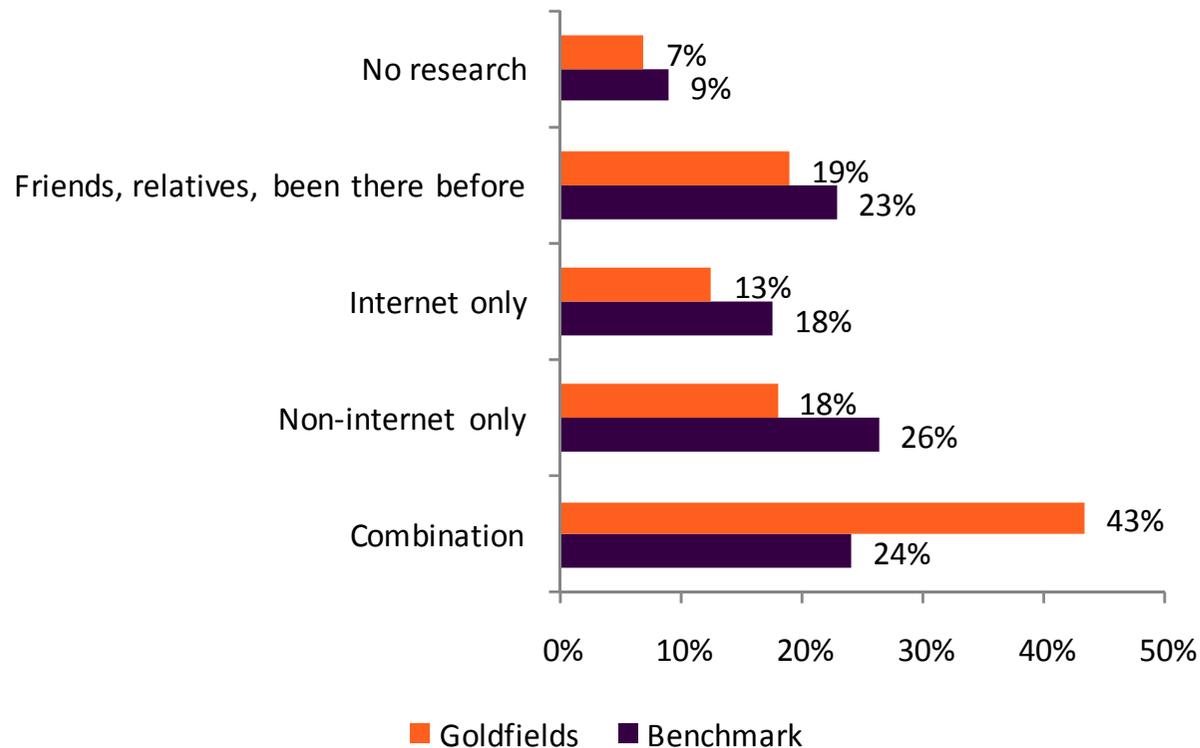
# The internet and previous visits were the main sources of information



Base = 485

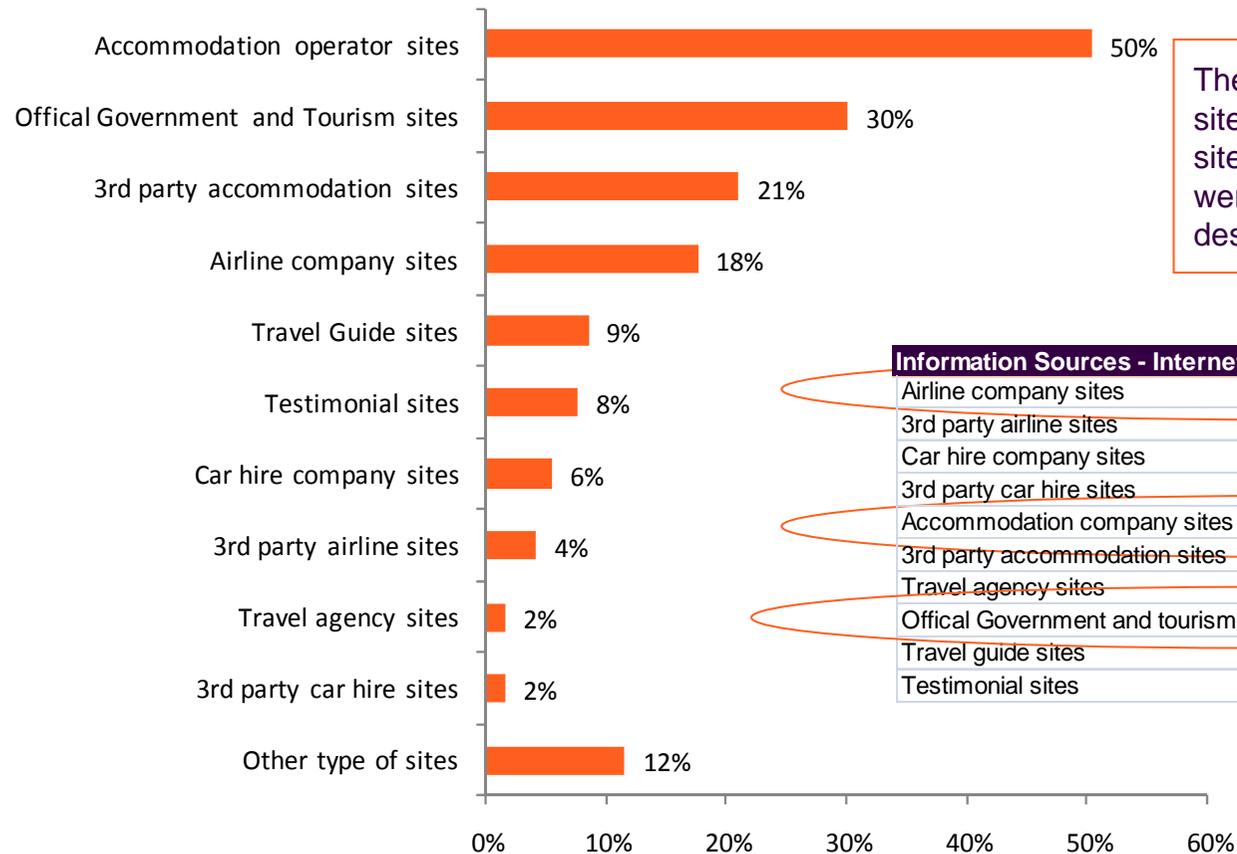
'Which of the following did you use to obtain information for this trip to Ballarat/Bendigo?'

# The highest proportion of visitors used a combination of internet and non-internet sources



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



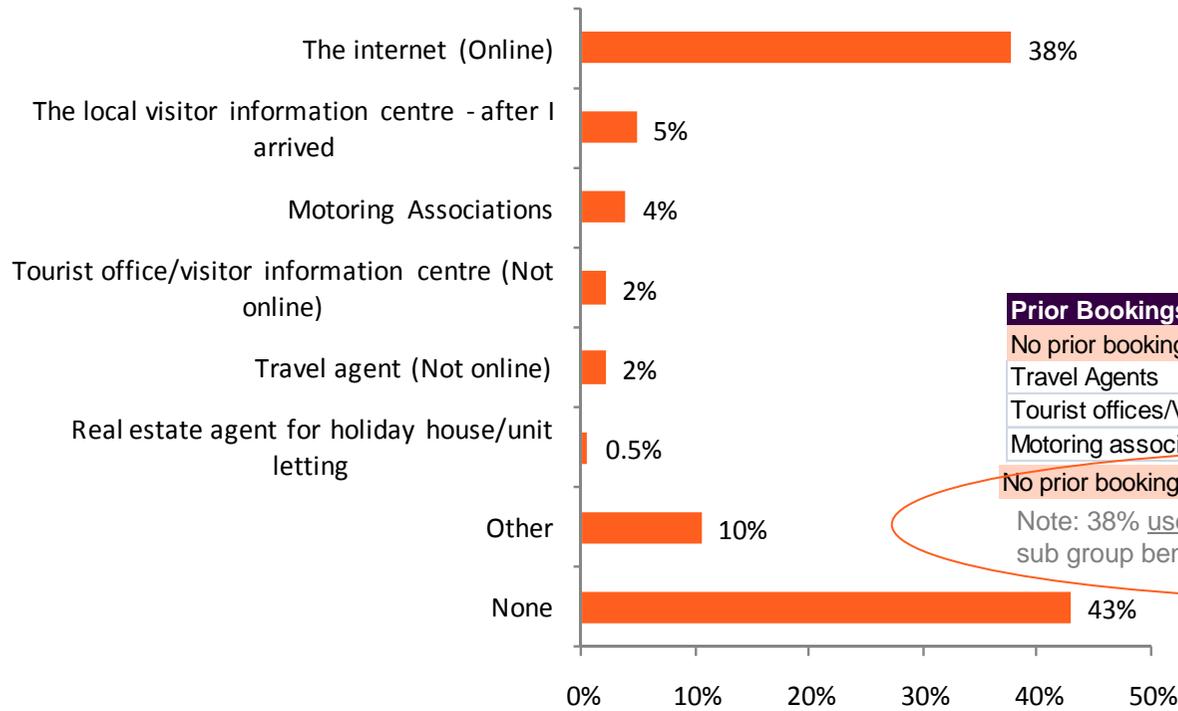
The proportions who used airline sites, accommodation operator sites and official government sites were above the subgroup and all destination benchmarks.

Information Sources - Internet sites	Gold	Subgroup	All
Airline company sites	18%	↑ 9%	↑ 8%
3rd party airline sites	4%	→ 2%	→ 2%
Car hire company sites	6%	→ 2%	→ 2%
3rd party car hire sites	2%	→ 1%	→ 1%
Accommodation company sites	50%	↑ 9%	↑ 8%
3rd party accommodation sites	21%	→ -3%	↓ -4%
Travel agency sites	2%	→ 0%	→ -1%
Official Government and tourism sites	30%	↑ 4%	↑ 8%
Travel guide sites	9%	→ -2%	→ -2%
Testimonial sites	8%	→ 1%	→ 0%

Base = 232

*'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

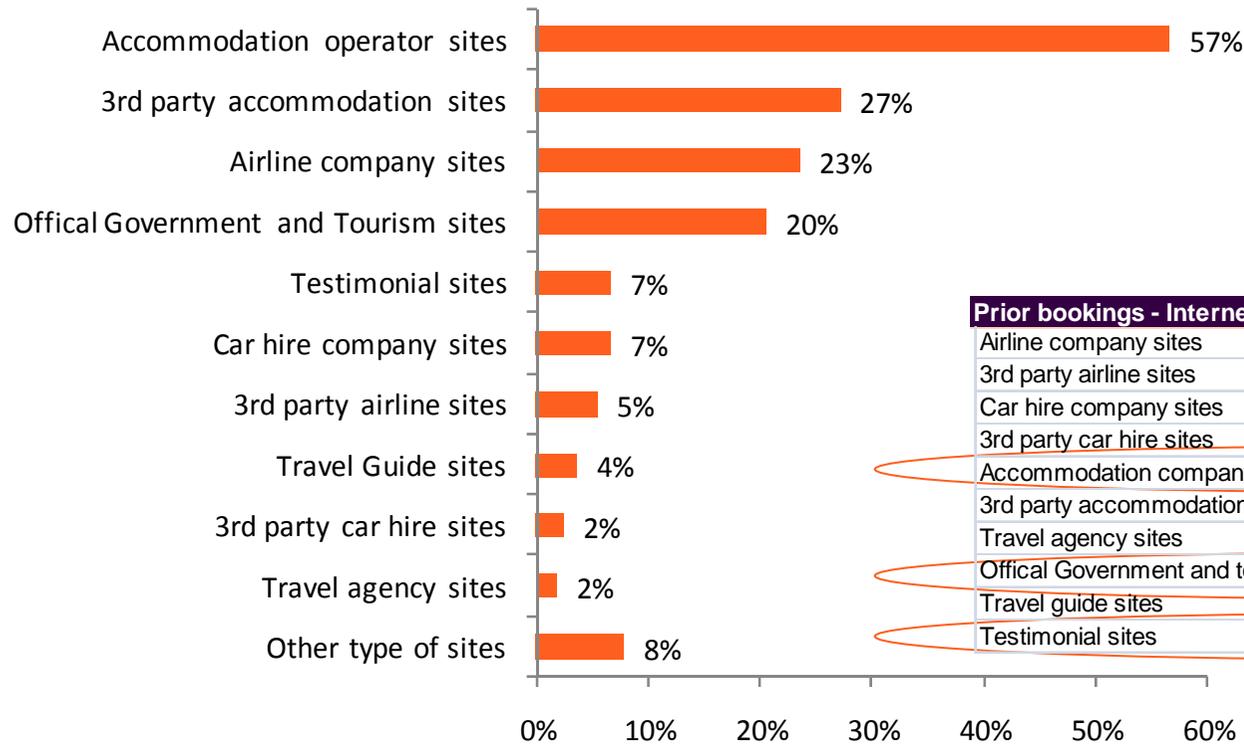


The proportion who did not make any bookings was higher than the benchmarks.

Prior Bookings - Non internet	Gold	Subgroup	All
No prior bookings made	43%	↑ 4%	↑ 6%
Travel Agents	2%	→ 0%	↓ -9%
Tourist offices/Visitor Information Centres	2%	→ -2%	→ -2%
Motoring associations	4%	→ 2%	→ 2%
No prior bookings made on internet	62%	→ 1%	↑ 6%

Note: 38% used the internet for bookings which is 1 point below the sub group benchmark and 6 points below the VPS benchmark.

# Accommodation operator sites were the most popular sites for bookings



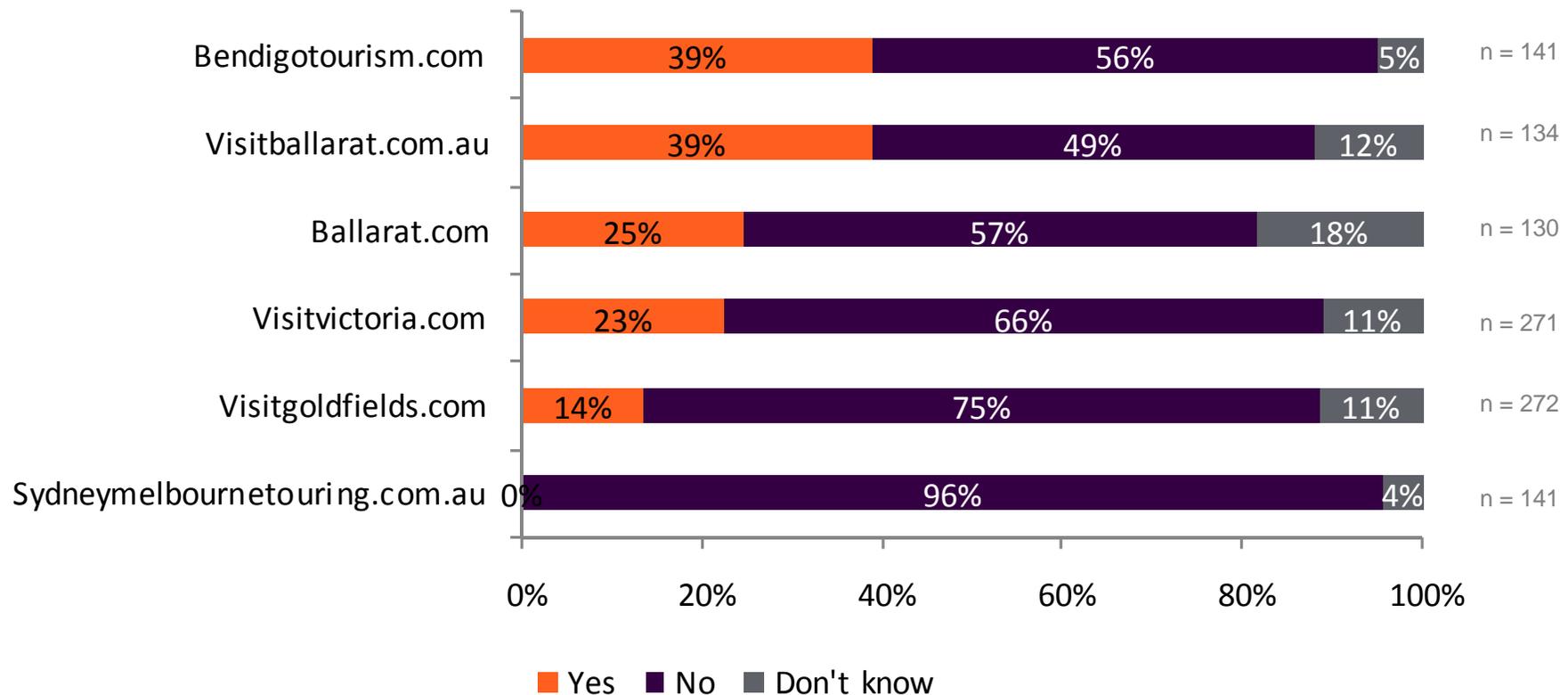
The proportions who used accommodation operator sites, official government sites and testimonial sites were above the subgroup and VPS benchmarks.

Prior bookings - Internet sites	Gold	Subgroup	All
Airline company sites	23%	↑ 10%	→ 3%
3rd party airline sites	5%	→ 3%	→ 3%
Car hire company sites	7%	→ 0%	→ 0%
3rd party car hire sites	2%	→ 1%	→ 1%
Accommodation company sites	57%	↑ 5%	↑ 9%
3rd party accommodation sites	27%	→ -3%	→ -2%
Travel agency sites	2%	→ 0%	→ 0%
Official Government and tourism sites	20%	↑ 11%	↑ 10%
Travel guide sites	4%	→ 2%	→ 0%
Testimonial sites	7%	↑ 4%	↑ 4%

Base = 166

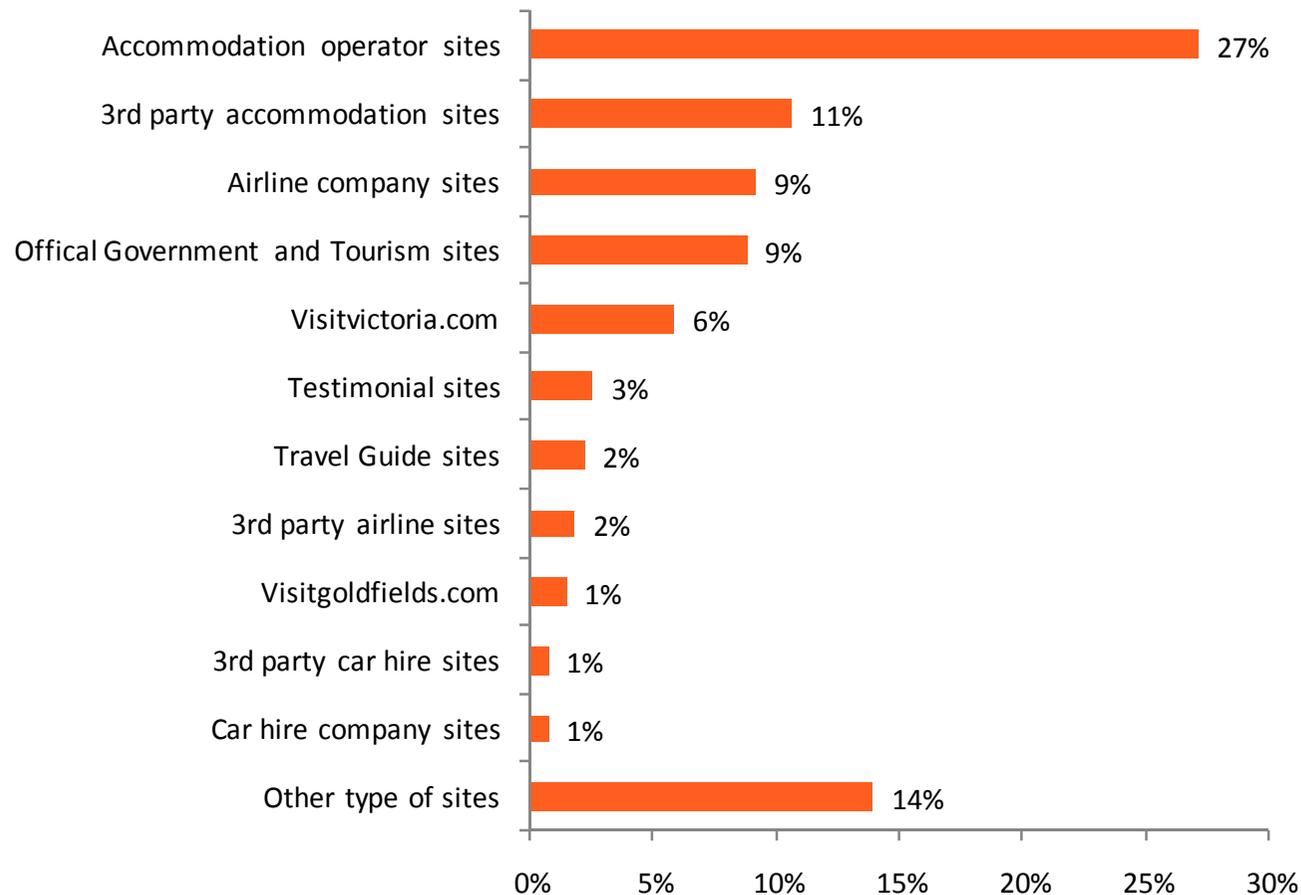
*'You mentioned that you used the internet for booking. What are the type of websites you went to?'*

# Bendigotourism.com and Visitballarat.com.au were the most visited destination specific site



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

# Nearly three in ten visitors thought the accommodation operator sites were the most useful sites



Base = 273

Only includes options that were asked in both the Bendigo and Ballarat surveys.

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

# Summary

- Over three quarter of visitors (76%) 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 nine points above the VPS benchmark.
- The internet (49%) and previous visits (43%) were the main sources of information. The proportion who used the internet was above the benchmarks.
- The proportion who used the Visitor Information Centres (32%) was above the benchmarks.
- Accommodation operator sites (50%) and official government or tourism sites (30%) were the most common websites used for information.

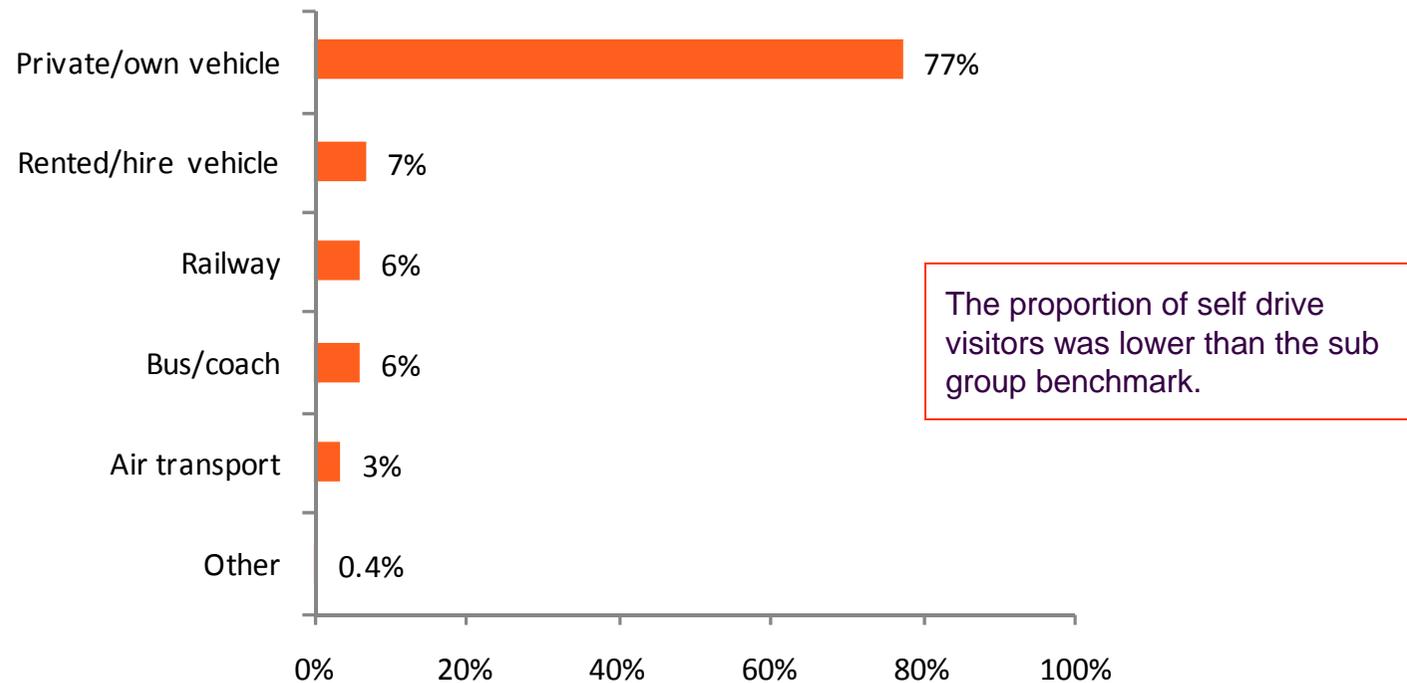
# Summary

- A higher proportion of visitors (43%) did not make any bookings prior to their visit compared with the benchmarks.
- Nearly four in ten visitors (38%) used the internet to make bookings – a similar proportion to the subgroup benchmark, but six points below the VPS benchmark.
- Accommodation operator sites (57%) were the most common websites used for booking, a higher proportion than both the sub group and VPS benchmarks.
- Nearly three in ten visitors (27%) chose accommodation operator sites as the most useful website.

# Getting to and around the Goldfields

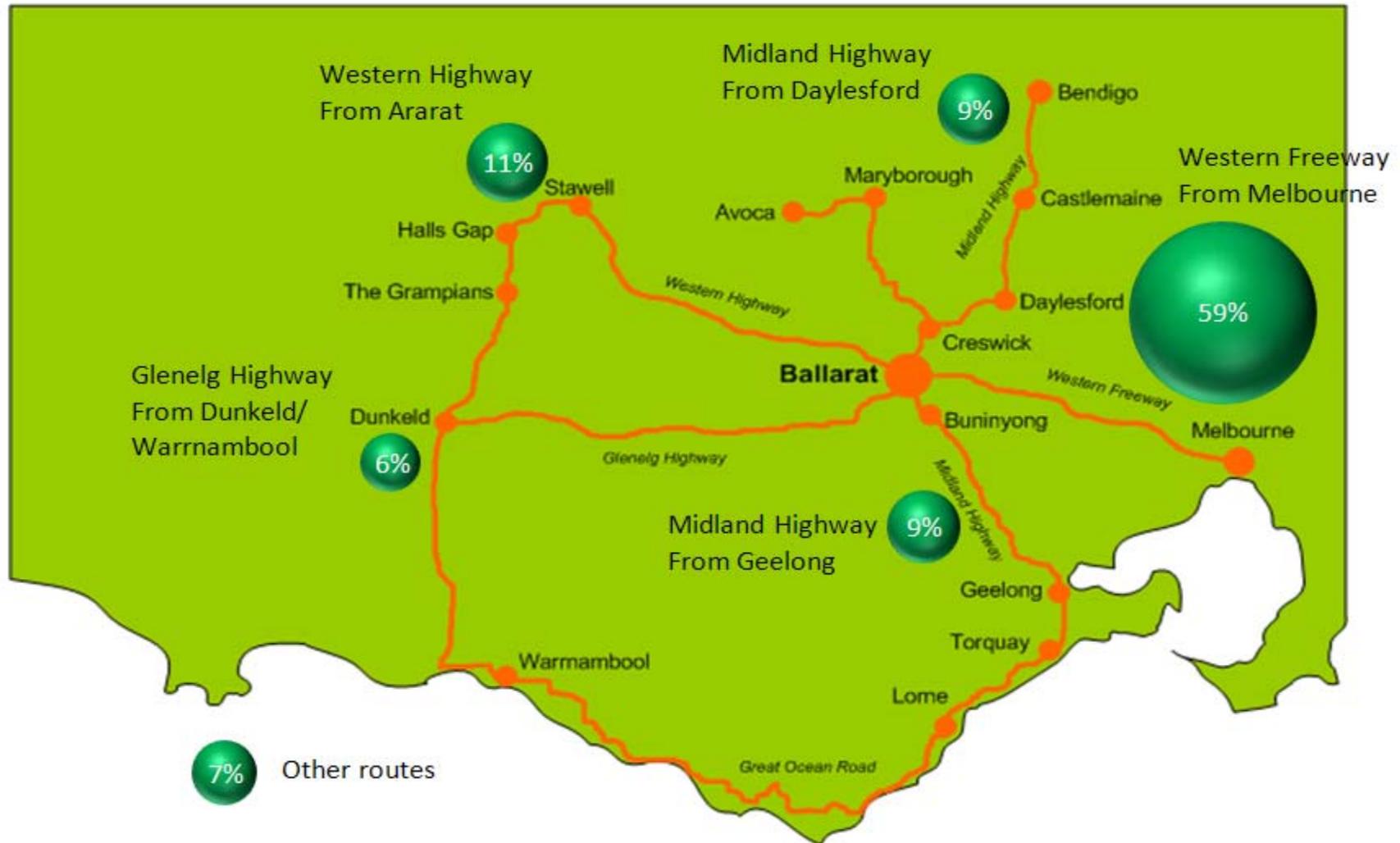
- Transport used
- Routes taken in and out
- Locations visited

# More than four in five visitors were self drive

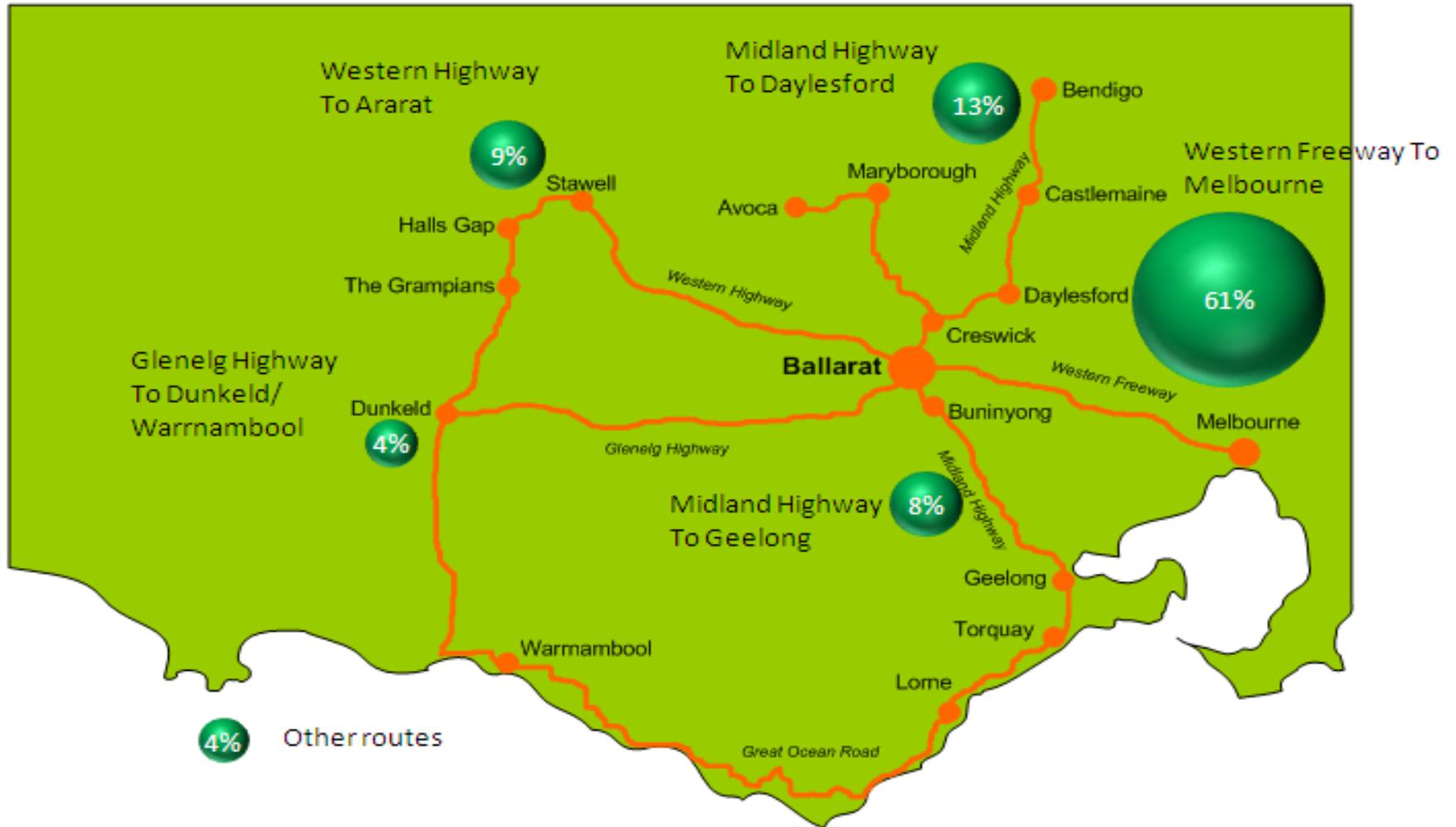


Other Characteristics	Gold	Subgroup	All
Self drive	84%	↓ -6%	↑ 5%
Air travel	3%	→ 1%	↓ -10%

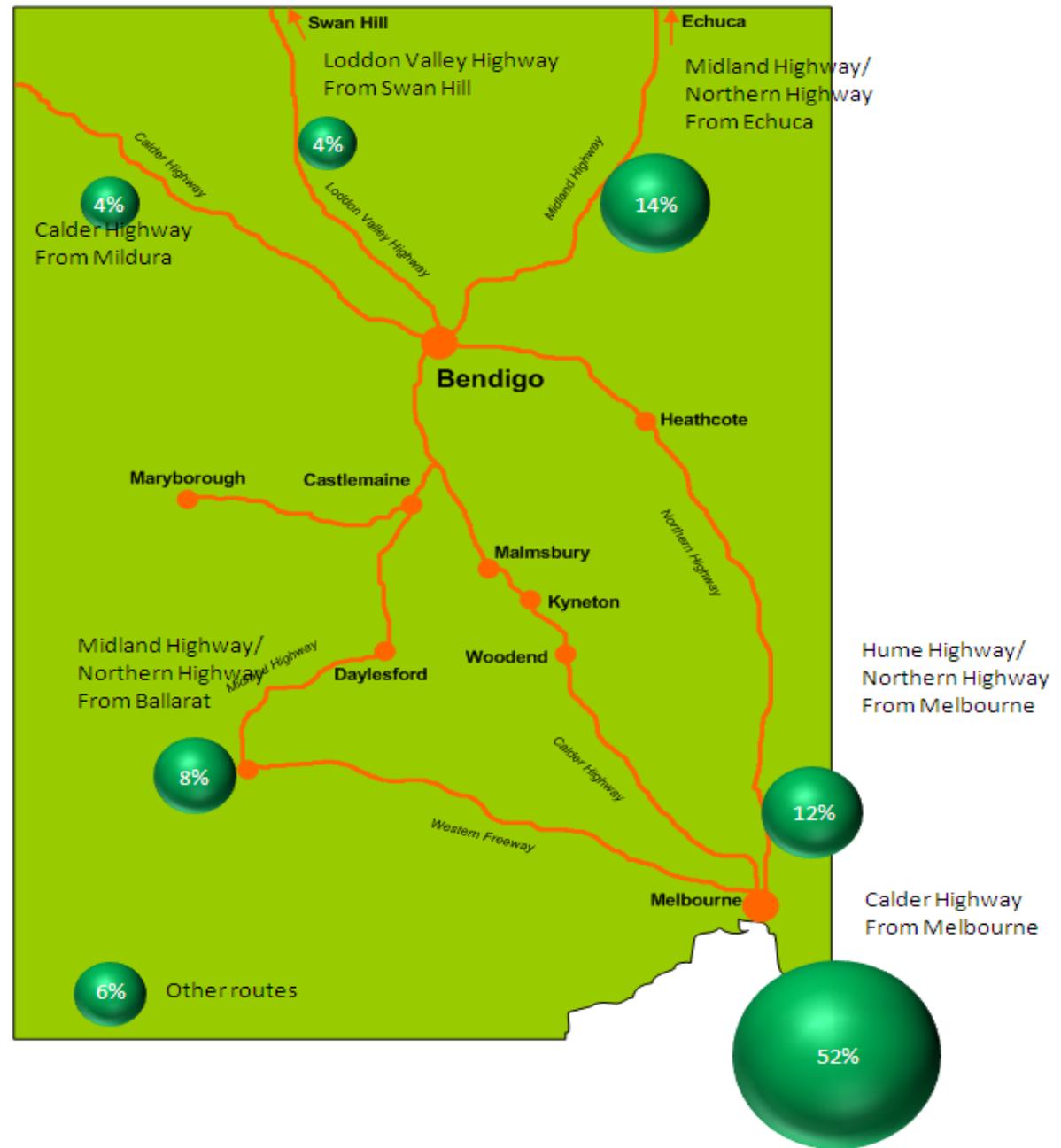
# Routes used to get to Ballarat



# Routes used to leave Ballarat



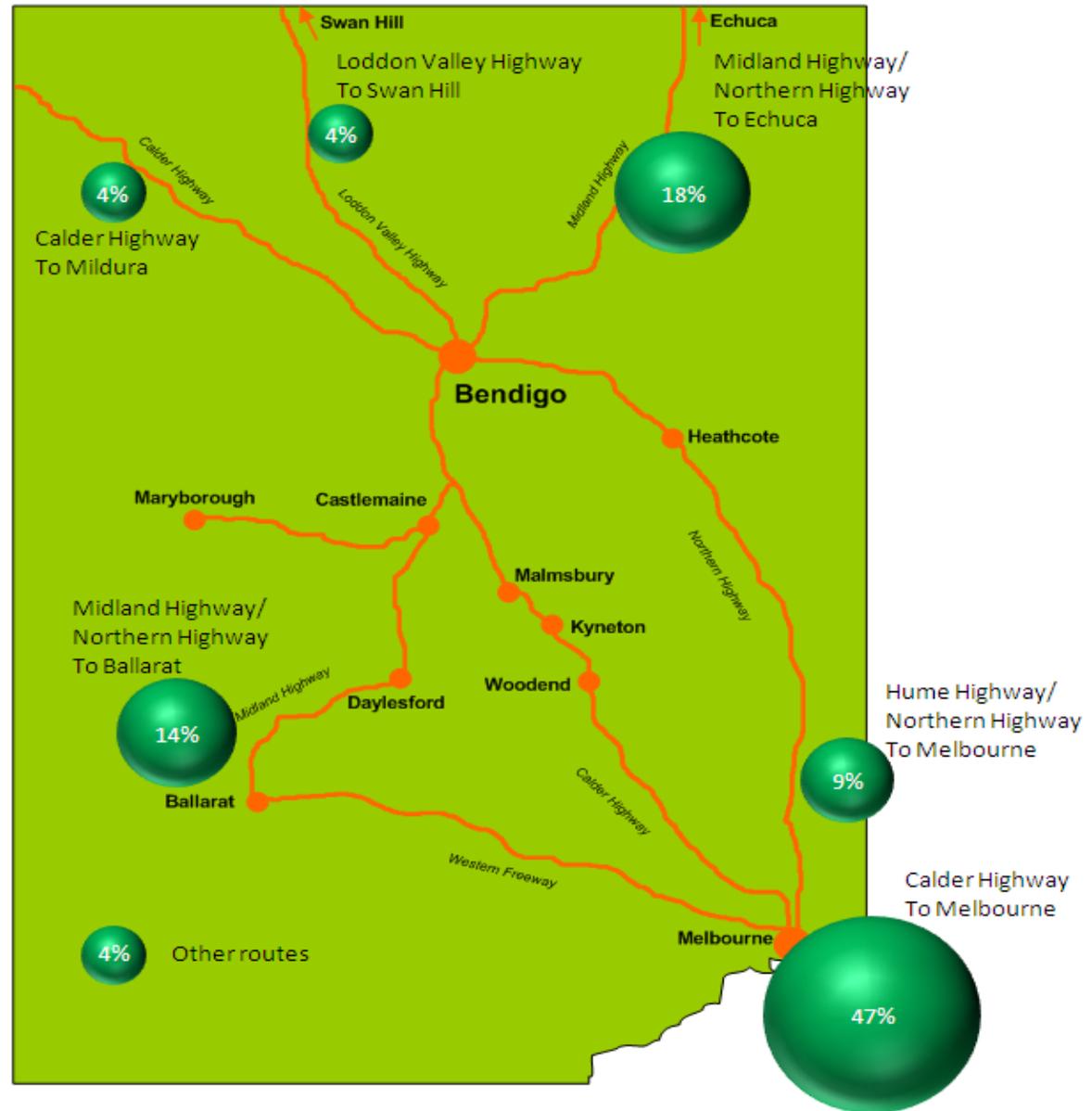
# Routes used to travel to Bendigo



Base = 198

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

# Routes used to leave Bendigo



# Towns stopped during trip to Ballarat

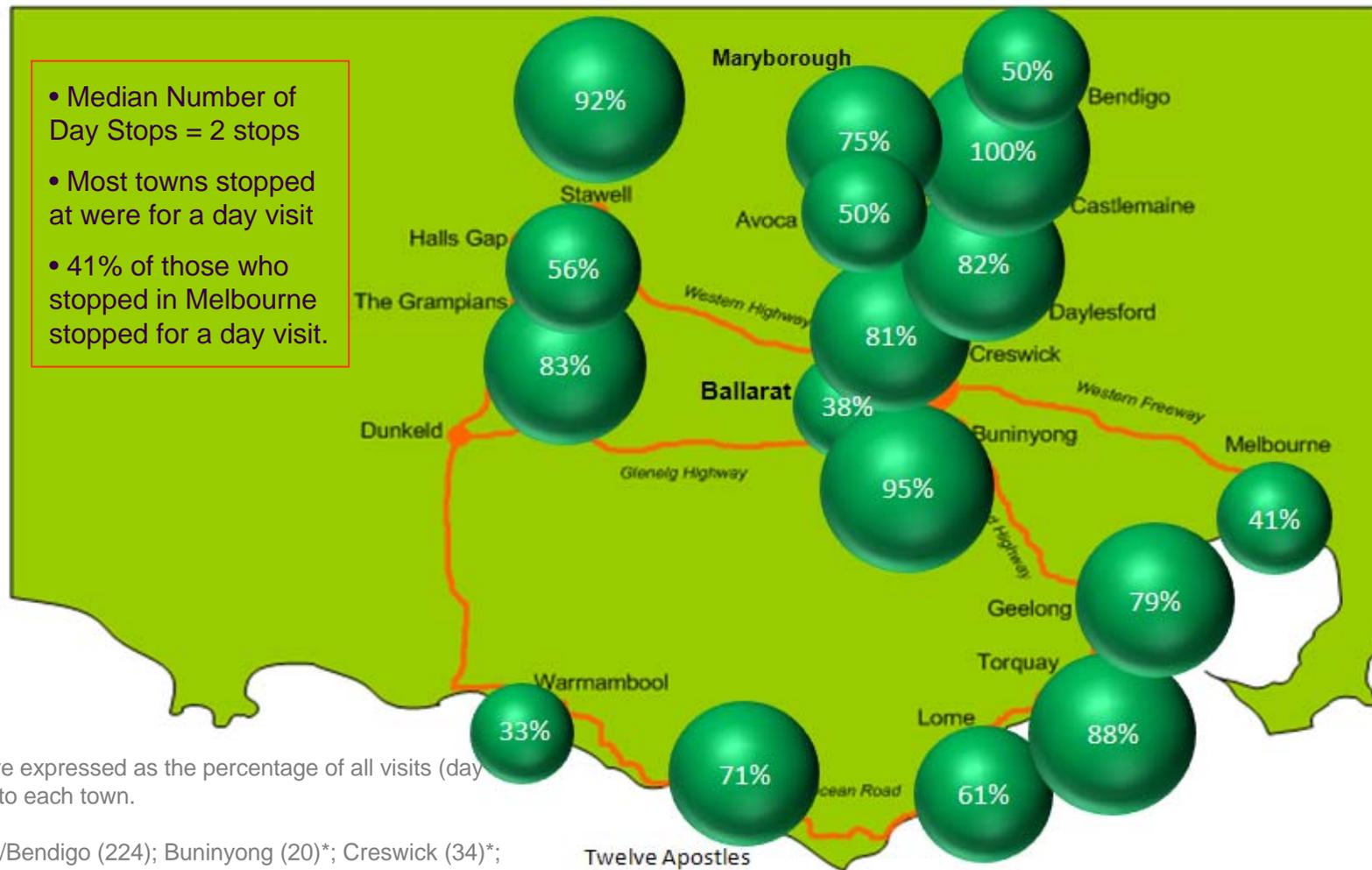


- Median Stops = 3 stops
- Melbourne was the most popular stop – 25% of visitors who stopped in Ballarat also stopped in Melbourne.

Base = 239

*"On this trip which, if any, of the following towns did you visit?"*

# Towns stopped at during trip to Ballarat – day visits

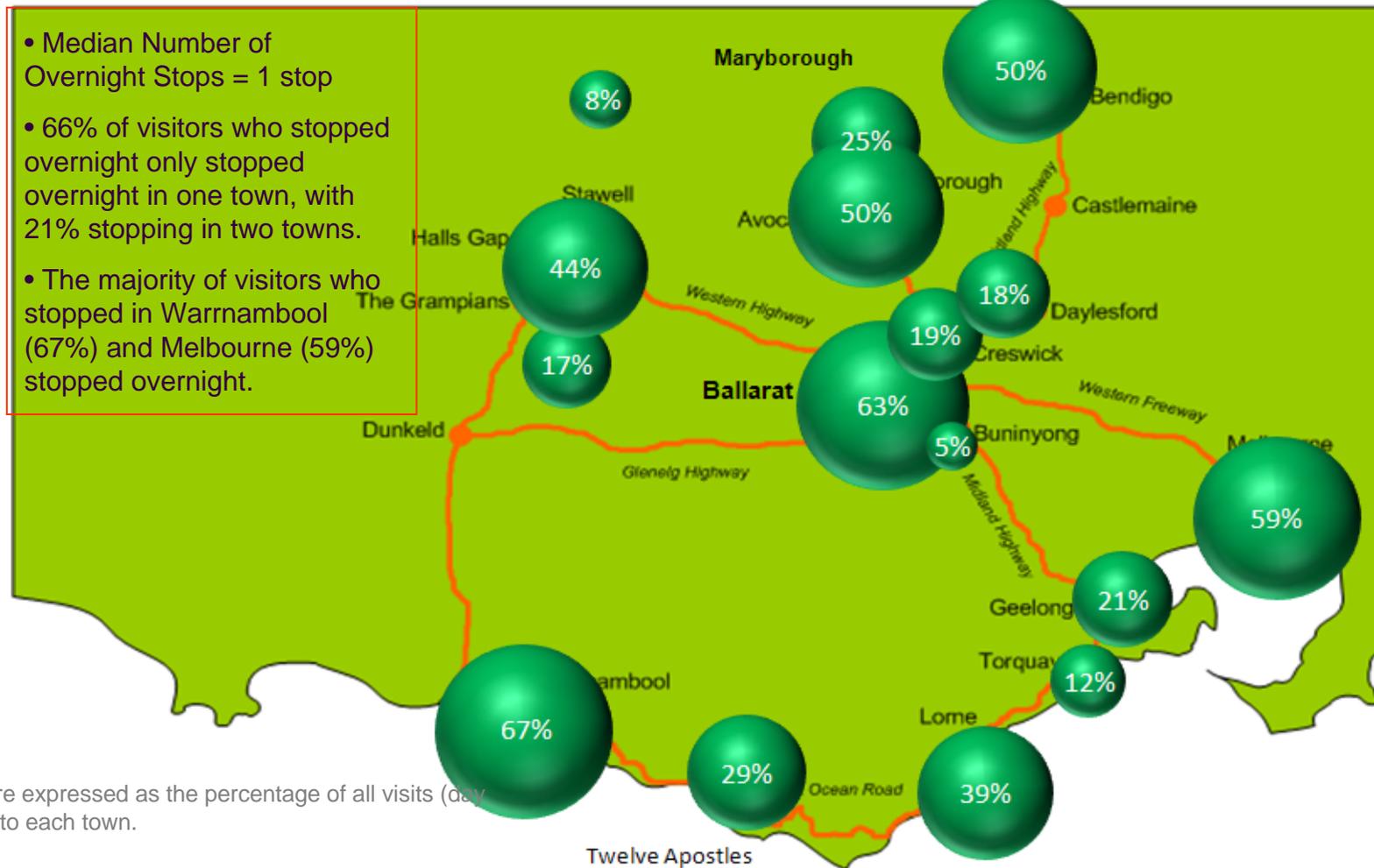


Percentages are expressed as the percentage of all visits (day and overnight) to each town.

Bases: Ballarat/Bendigo (224); Buninyong (20)\*; Creswick (34)\*; The Grampians (6)\*; Halls Gap (16)\*; Stawell (14)\*; Warrnambool (21)\*; Twelve Apostles (17)\*; Lorne (18)\*; Torquay (17)\*; Geelong (30)\*; Daylesford (48); Castlemaine (15)\*; Bendigo (25)\*; Maryborough (8)\*; Avoca (4)\*; Melbourne (59)  
 \* Small base.

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

# Towns stopped at during trip to Ballarat – overnight visits



- Median Number of Overnight Stops = 1 stop
- 66% of visitors who stopped overnight only stopped overnight in one town, with 21% stopping in two towns.
- The majority of visitors who stopped in Warrnambool (67%) and Melbourne (59%) stopped overnight.

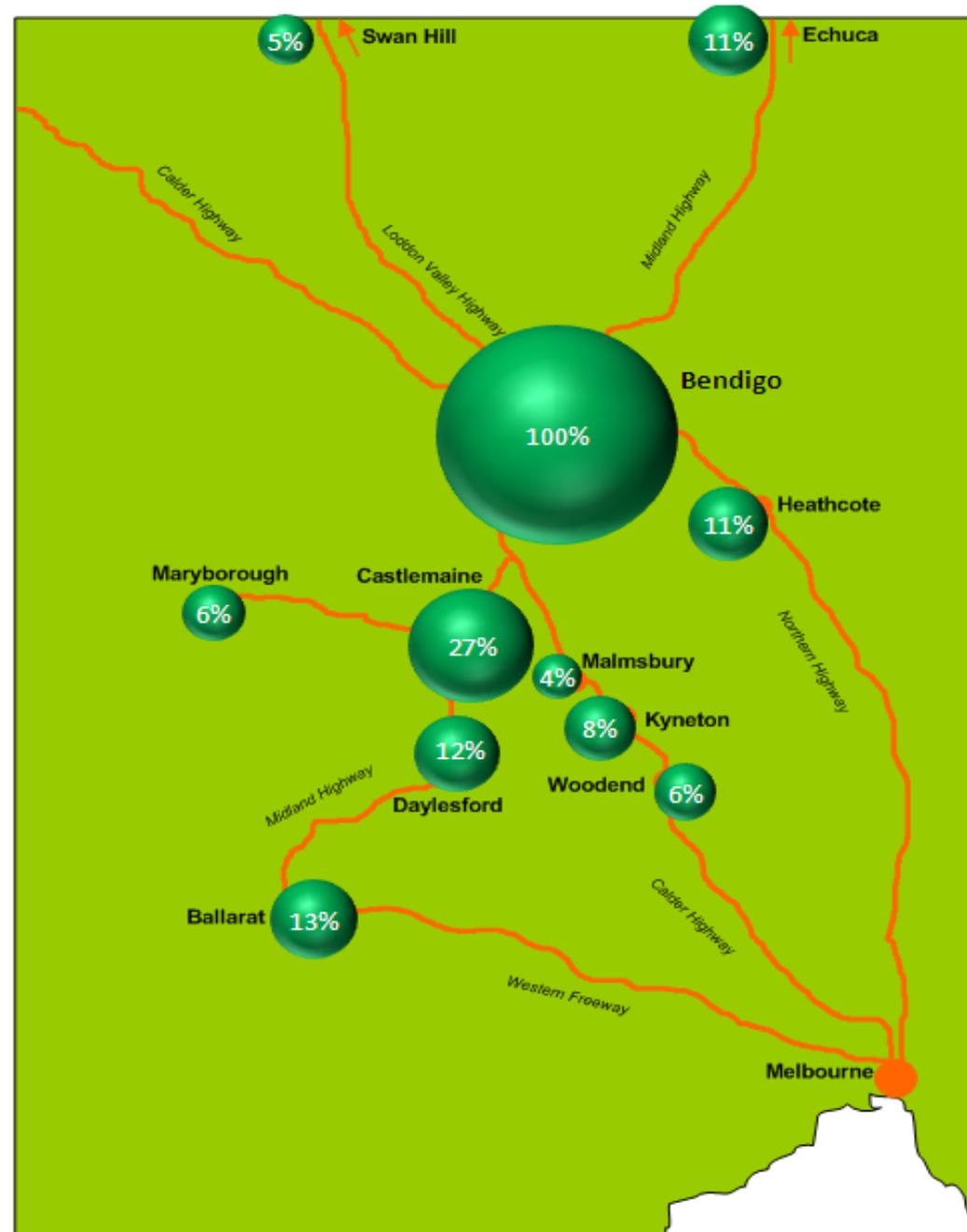
Percentages are expressed as the percentage of all visits (day and overnight) to each town.

Bases: Ballarat/Bendigo (224); Buninyong (20)\*; Creswick (34)\*; The Grampians (6)\*; Halls Gap (16)\*; Stawell (14)\*; Warrnambool (21)\*; Twelve Apostles (17)\*; Lorne (18)\*; Torquay (17)\*; Geelong (30)\*; Daylesford (48); Castlemaine (15)\*; Bendigo (25)\*; Maryborough (8)\*; Avoca (4)\*; Melbourne (59)  
 \* Small base.

*"On this trip which, if any, of the following towns did you visit?"*

# Towns stopped during trip to Bendigo

- Median Stops = 2 stops
- Castlemaine was the most popular stop – 27% of visitors who stopped in Bendigo also stopped in Castlemaine.



Base = 248

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

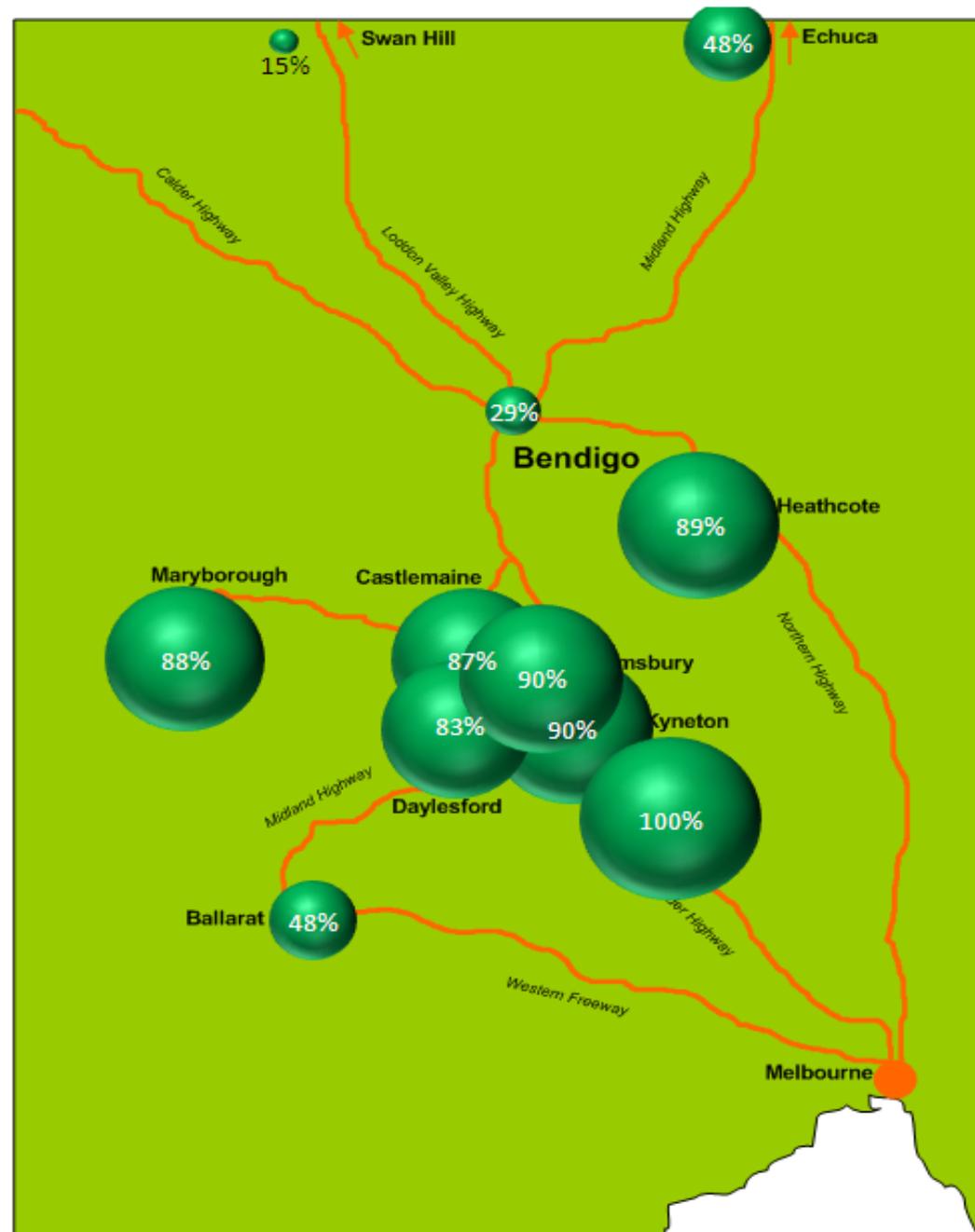
# Towns stopped at during trip to Bendigo – day visits

- 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?”

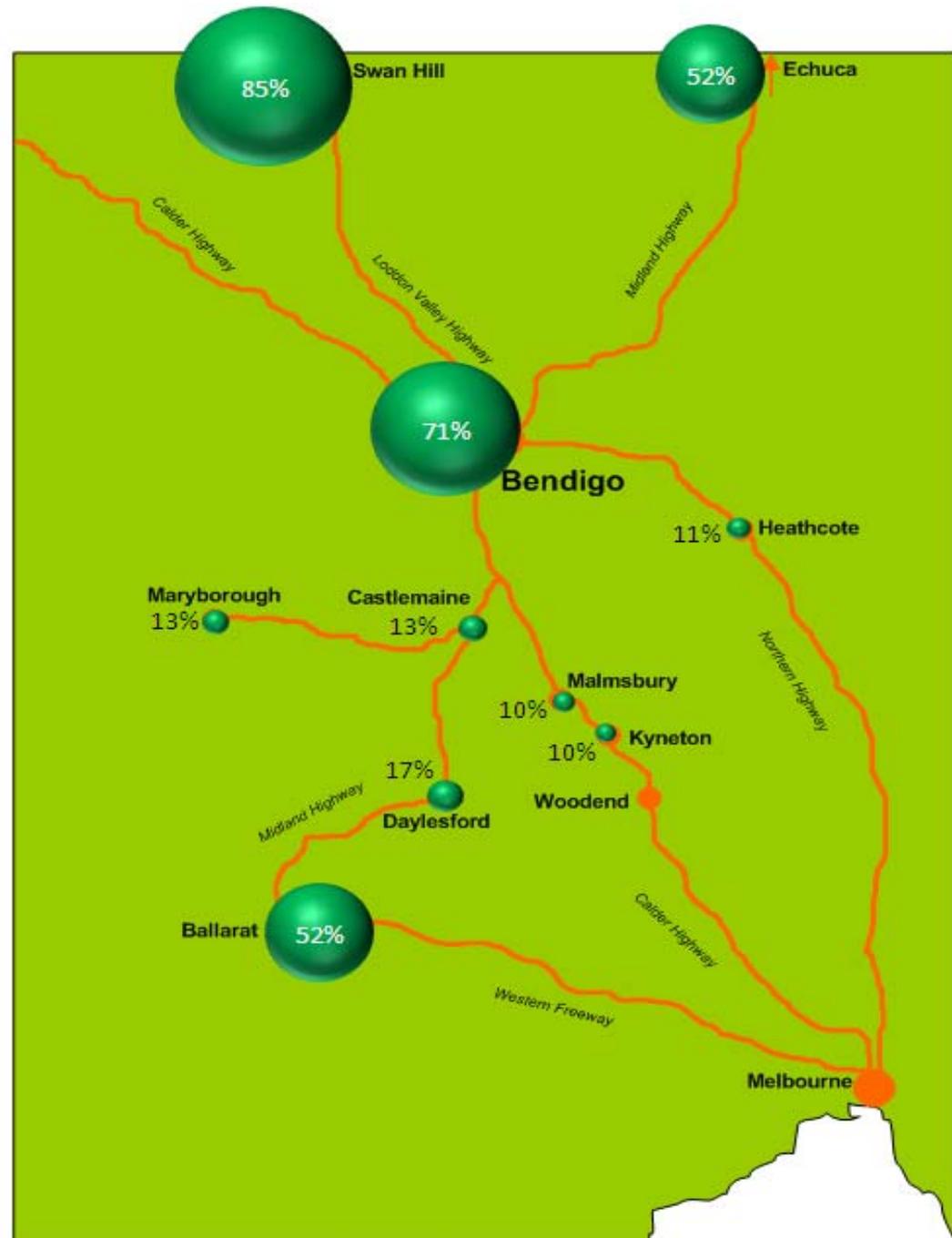
# Towns stopped at during trip to Bendigo – overnight visits

- 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?”

# Day visits to Ballarat - Towns visited during trip



# Overnight visits to Ballarat - Towns visited during trip



*"On this trip which, if any, of the following towns did you visit?"*

# Day visits to Bendigo - Towns visited during trip

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



Base = 65

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

# Overnight visits to Bendigo - Towns visited during trip

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 (84%), six points below the subgroup benchmark.
- The majority of visitors (59%) travelled to Ballarat on the Western Freeway from Melbourne, with 11% using the Western Highway from Ararat.
- The majority of visitors also used the Western Freeway to Melbourne to leave Ballarat (61%), with 13% using the Midland Highway to Daylesford.
- 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.
- For visitors to Ballarat, the most popular stops in the region were Melbourne (25%) and Daylesford (20%). The majority of those who stopped in Melbourne (59%) stopped there overnight whereas the majority who stopped in Daylesford (82%) stopped there for a day trip.
- For visitors to 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.

# Summary

- The majority of visitors who stopped overnight in Ballarat (66%) only stopped overnight in one town. Over a fifth (21%) stopped in two towns.
- Three in five visitors who stopped for a day trip in Ballarat did not stop anywhere else.
- Over a third of visitors who stopped overnight in Ballarat (35%) did not stop anywhere else. The most common stops were Melbourne (29%) and Daylesford (20%).
- The majority of visitors who stopped overnight in Bendigo (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%).

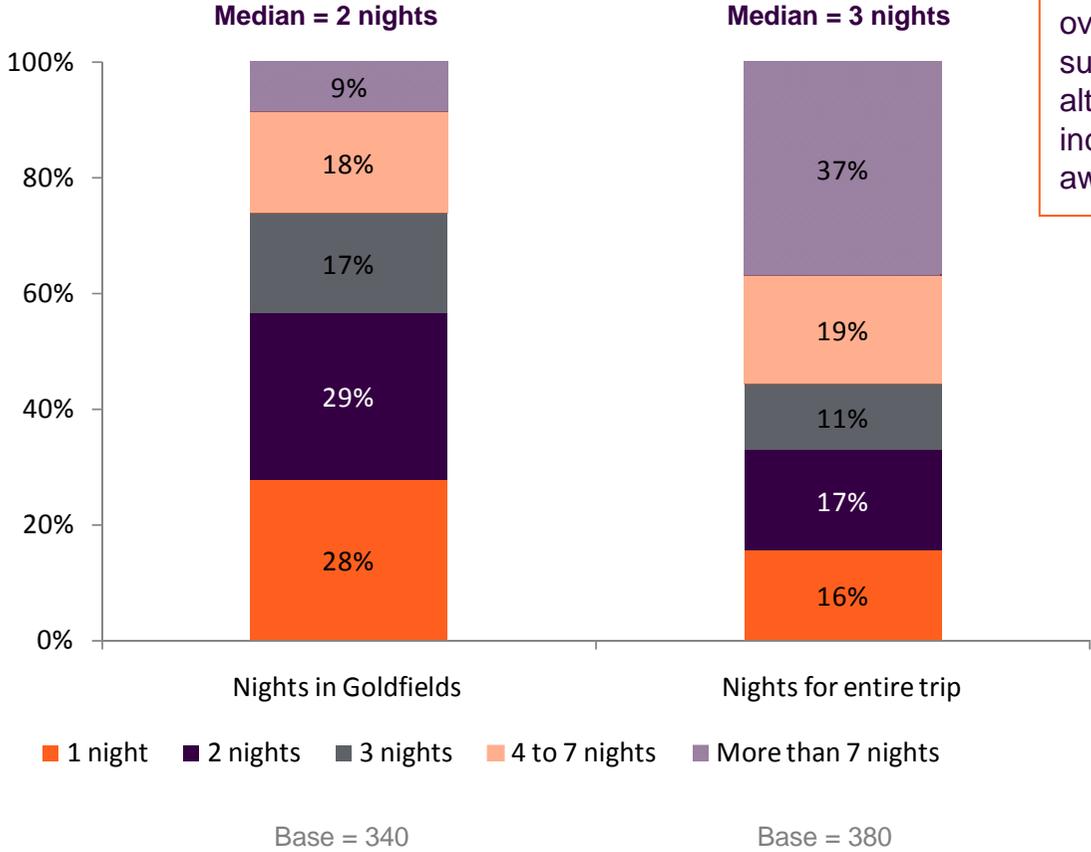
## Staying in the Goldfields

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

# Seven in ten visitors stayed in the Goldfields for at least one night

Length of Stay	Gold	Subgroup	All
Day Trip	29%	↑ 7%	→ 2%
Overnight	71%	↓ -7%	→ -2%

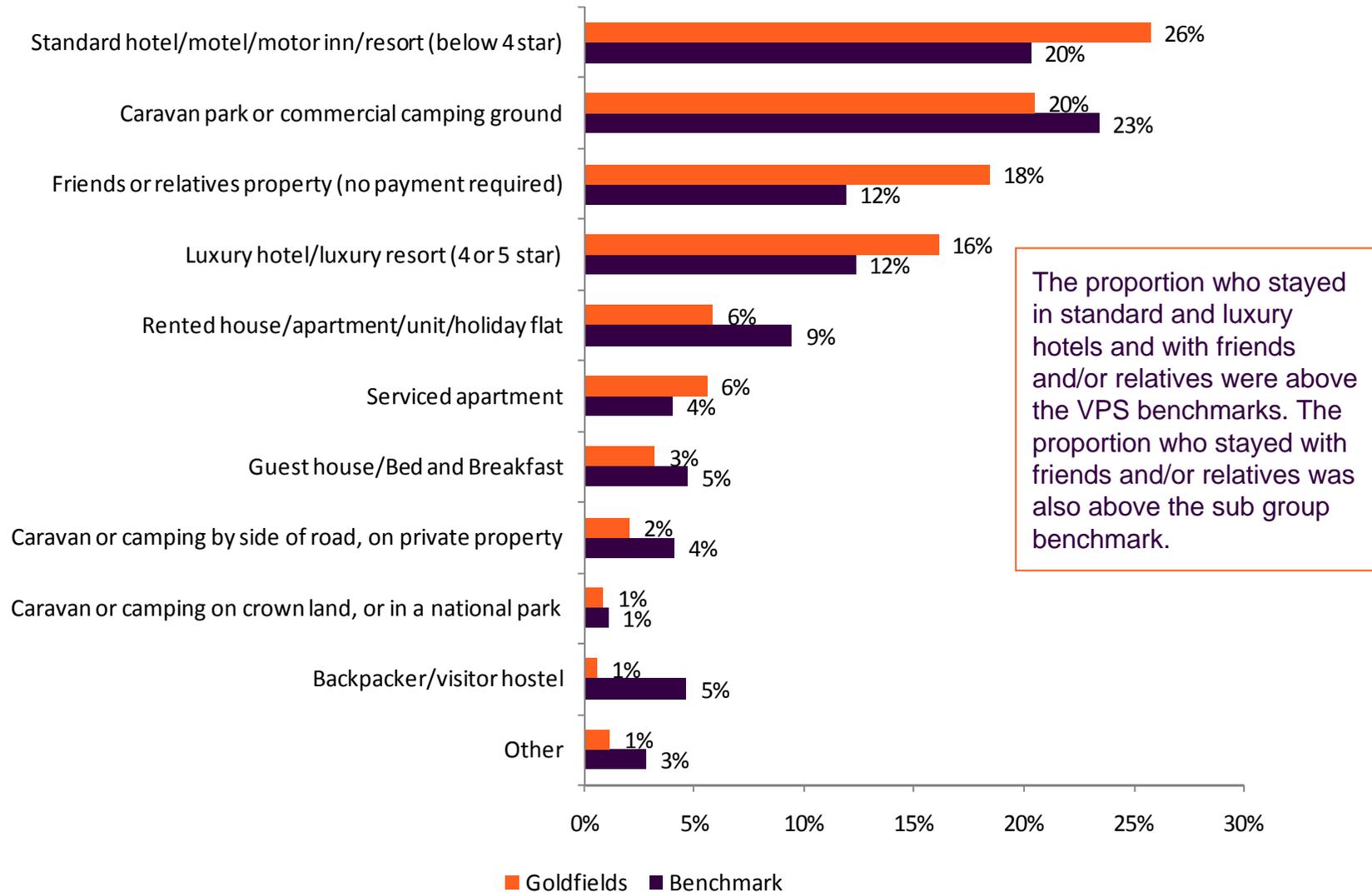
There was a higher proportion of day visitors and lower proportion of overnight visitors than the sub group benchmark although the sub group includes regions further away from Melbourne.



“How many nights did you stay in Ballarat/Bendigo during this trip?”

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

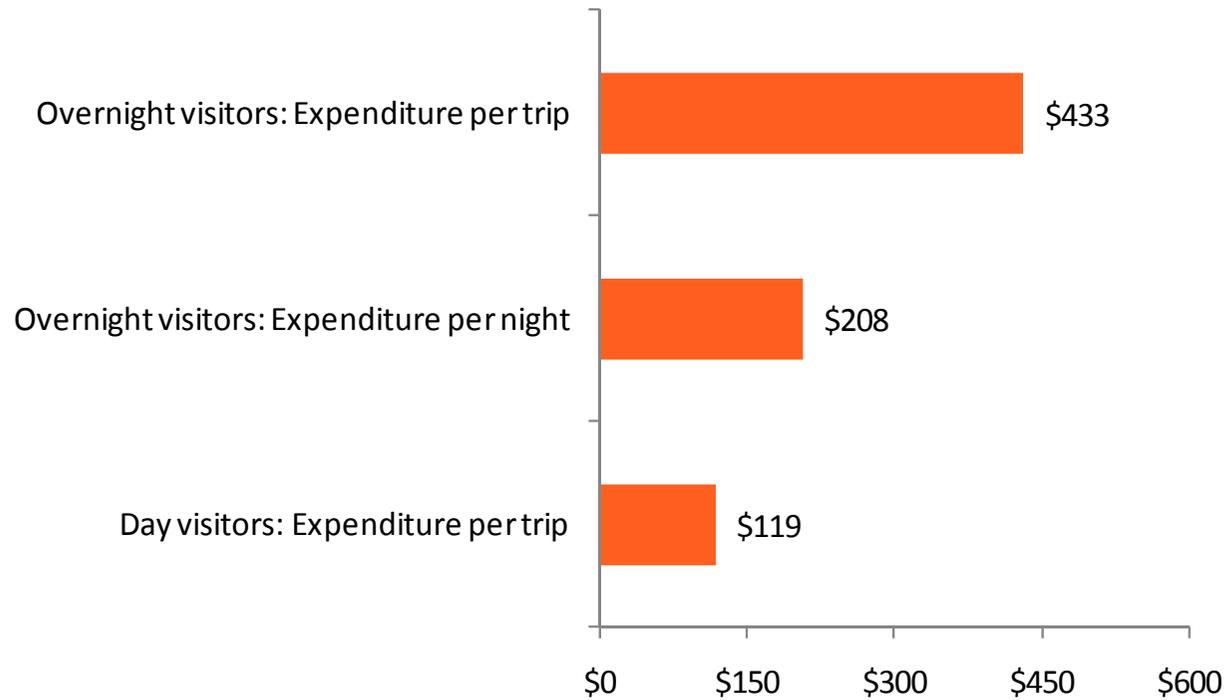
# Over a quarter of visitors stayed in standard hotels



Base = 342

“What type of accommodation did you mainly use in Ballarat/Bendigo?”

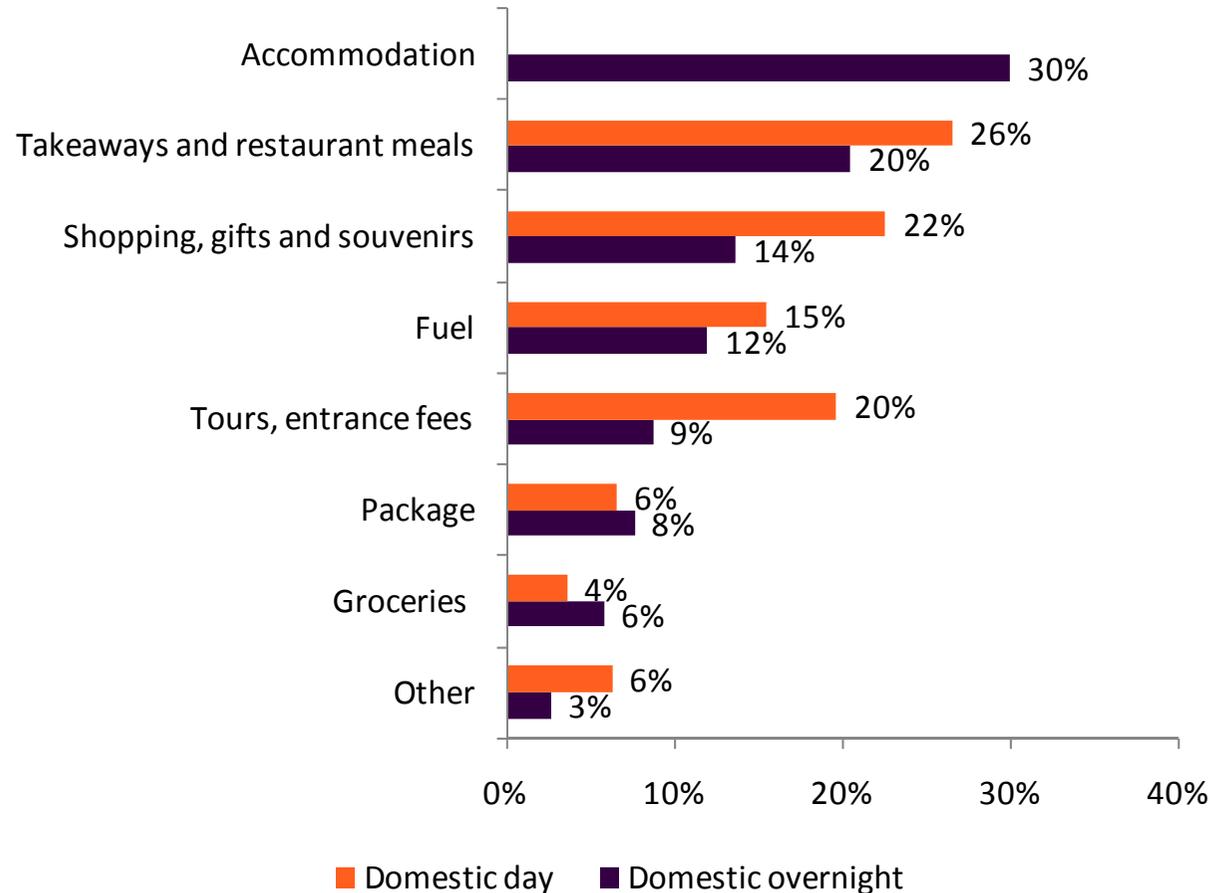
# Expenditure in the Goldfields



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

Bases: Day visitors 404; Overnight visitors 634; Median stay = 2 nights  
Note: From recruitment data file

# The largest proportion of overnight expenditure was on accommodation



Bases: Day visitors 404; Overnight visitors 634  
Note: From recruitment data file

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

# Summary

- Over seven in ten visitors (71%) stopped at least one night in the region. This was a lower proportion than the sub group benchmark.
- Nearly three in ten visitors (29%) were day visitors, a larger proportion than the sub group benchmark.
- The median stay was two nights with 91% of overnight trips less than seven nights.
- Over a fifth of visitors (26%) stayed in standard hotels/motels, 20% in commercial caravan or camping grounds, 18% with friends and/or relatives and 16% in luxury hotels/resorts – with the exception of commercial caravan or camping ground, all proportions were higher than the benchmarks.
- Domestic day visitors spent \$119 on average in the Goldfields. The majority of the expenditure was on takeaways and restaurant meals (26%), shopping (22%) and tours/entrance fees (20%).
- Domestic overnight visitors spent \$208 per night or \$433 per trip while in the Goldfields. Thirty per cent of the expenditure was on accommodation and 20% on takeaways and restaurant meals.

# Why they visited the Goldfields and were they happy



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

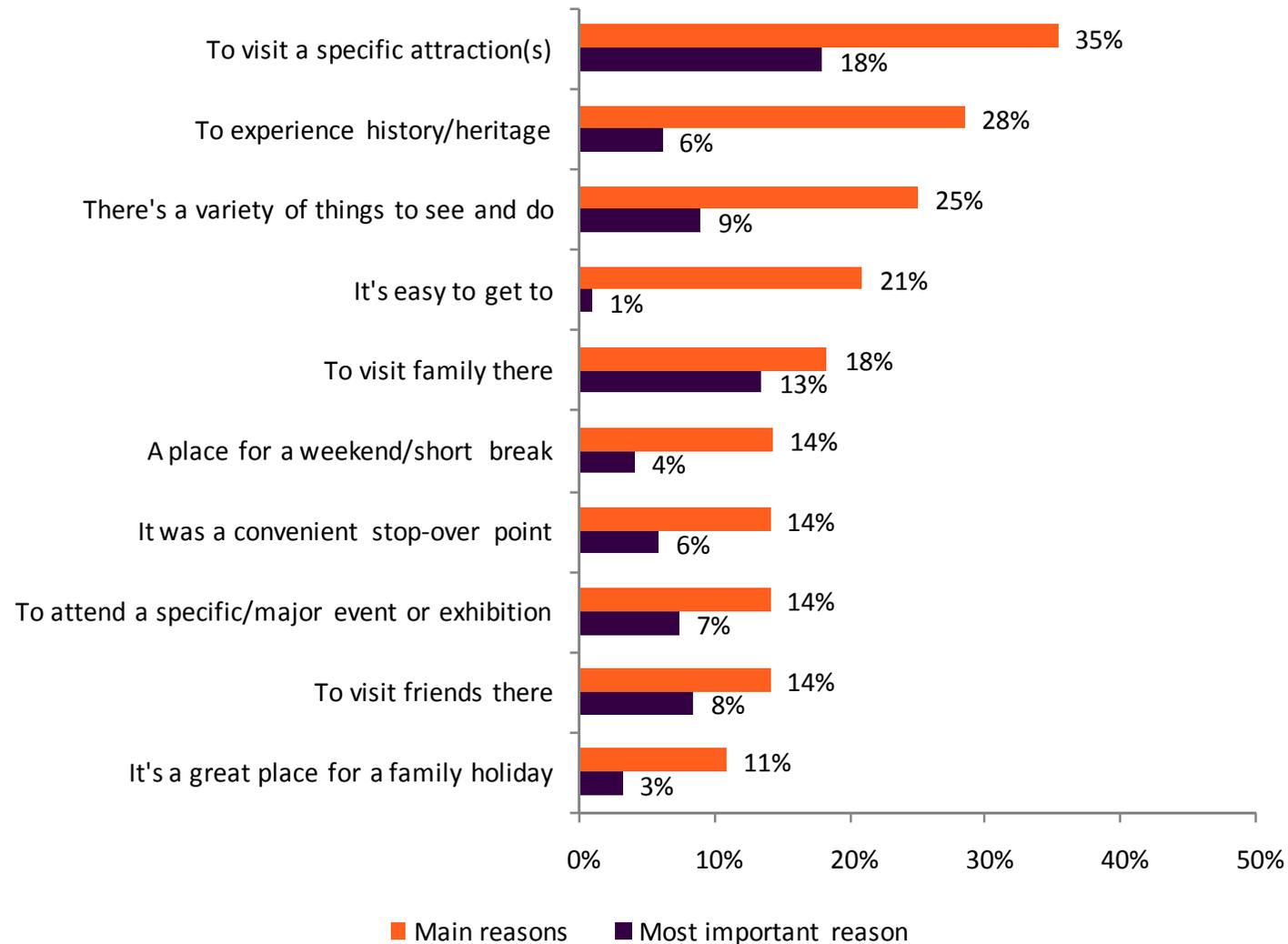


**TRA** TOURISM  
RESEARCH  
AUSTRALIA

# Reasons for visiting the Goldfields

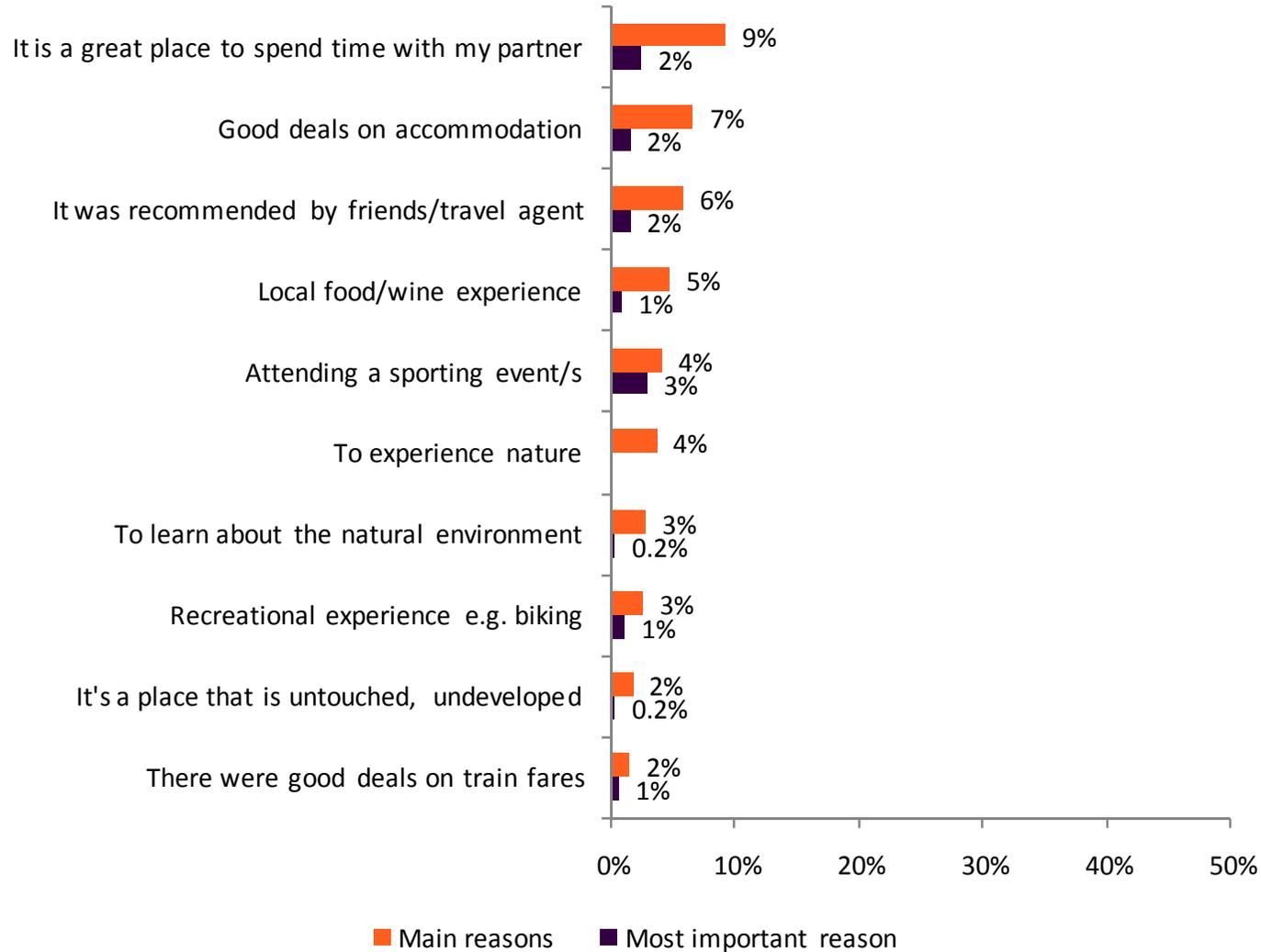
- Reasons for choosing destination
- Expectations of experiences

# Reasons for visiting revolved around the attractions, history/heritage, variety and ease of getting there



This chart continued on next slide.....

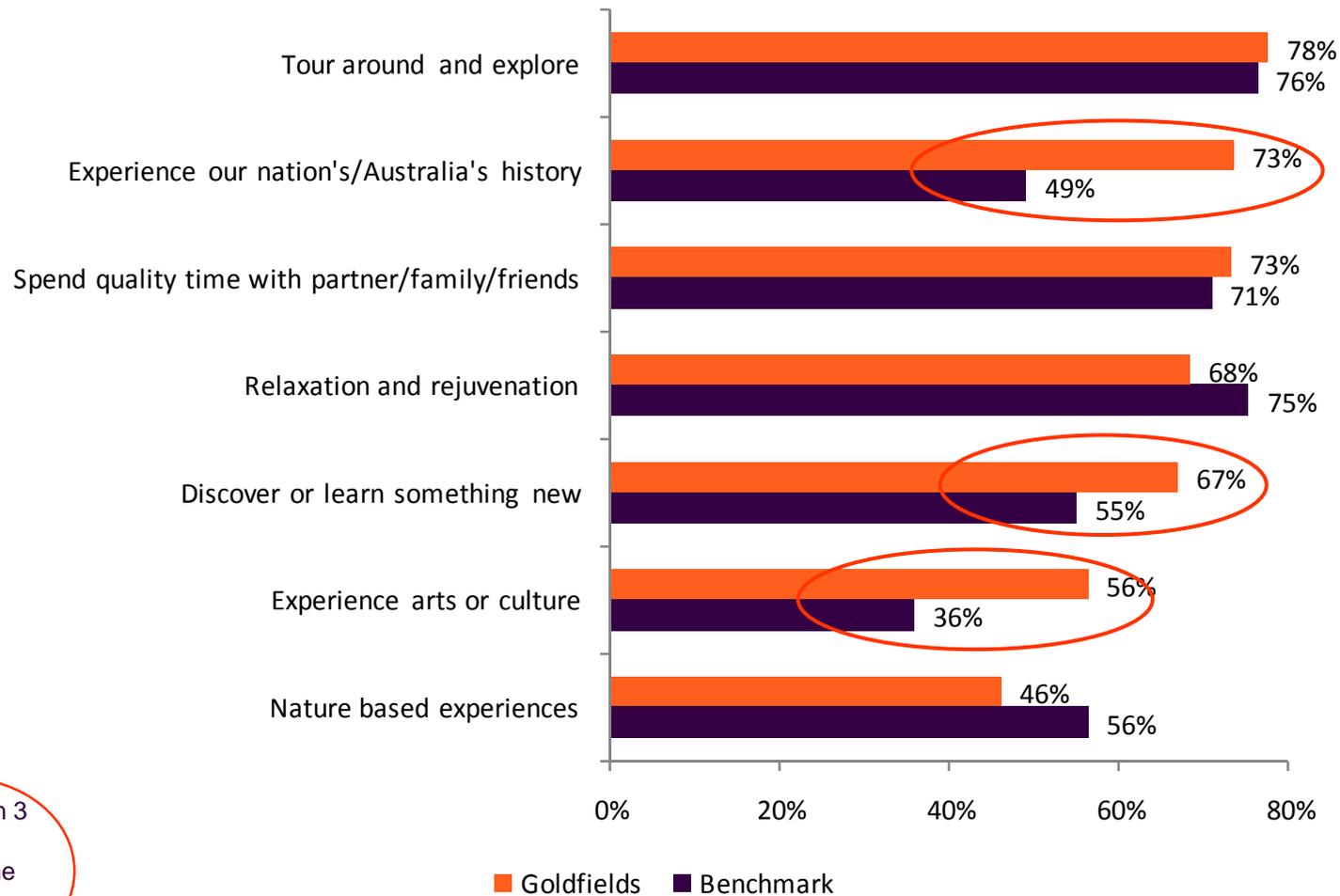
# ..... continued from previous slide



Bases: All respondents Main Reason = 465  
All respondents Most important = 464

*"Why did you chose Ballarat/Bendigo?"*  
*'Which of the following was most important in choosing Ballarat/Bendigo?'*

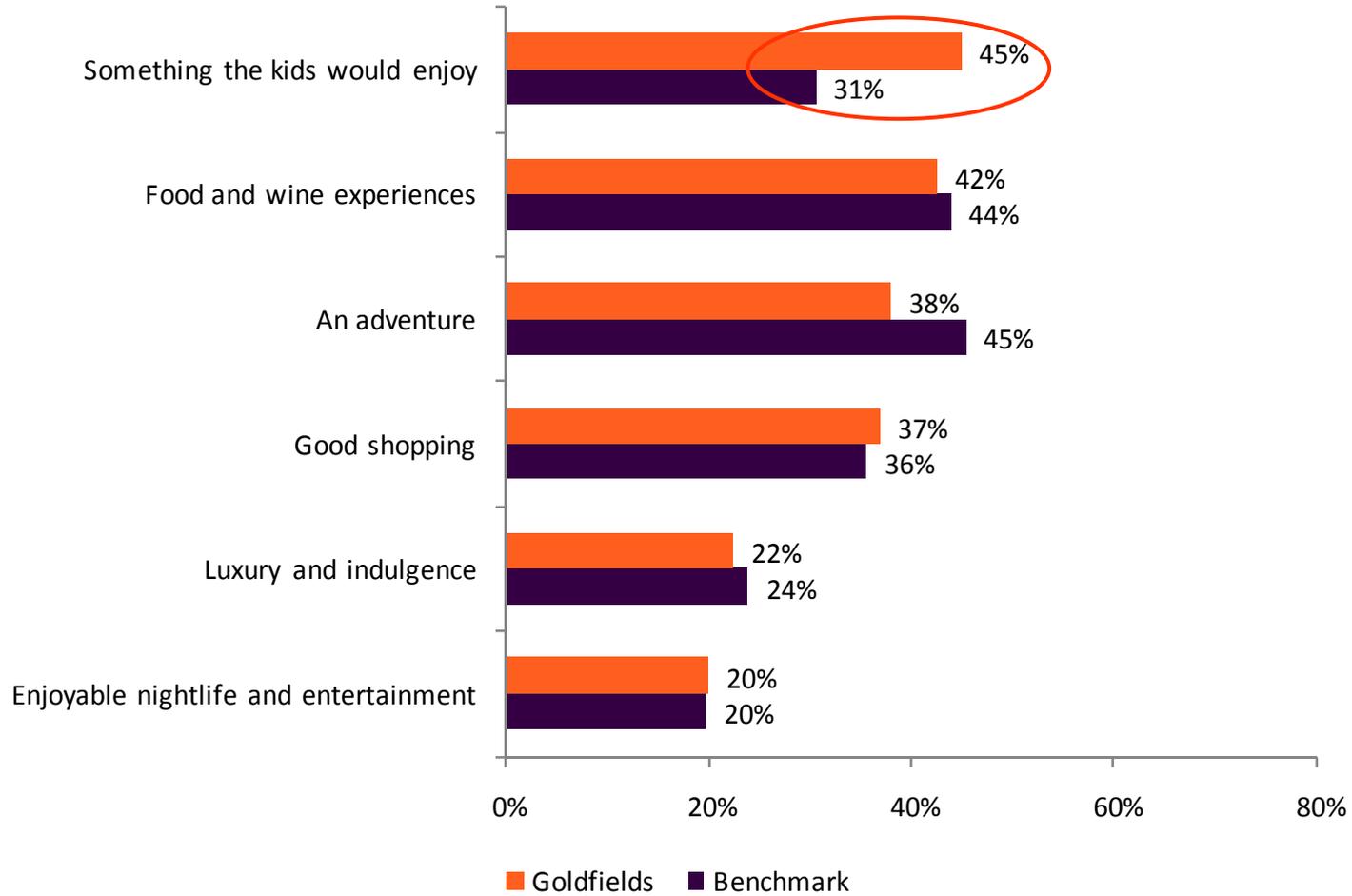
# Expectations for history/arts/culture, learning and something for the kids were above the benchmarks



More than 3 points above the VPS benchmark

This chart continued on next slide.....

..... continued from previous slide



Base = 486

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

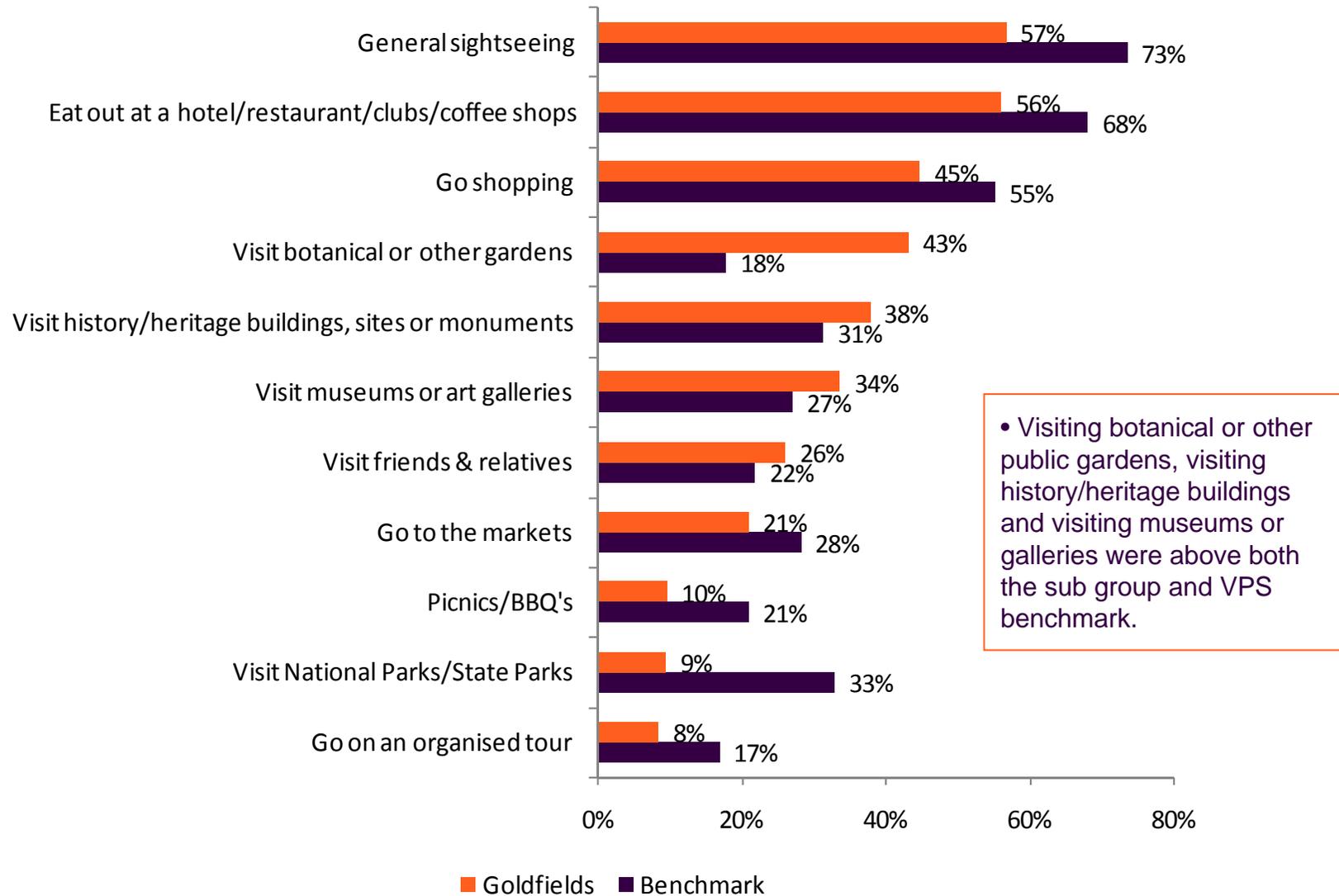
# Summary

- The main reasons for visiting the Goldfields were to visit specific attractions (35%), to experience history/heritage (28%), the variety of things to see and do (25%) and easy to get to (21%).
- The single most important reason for visiting the Goldfields was to visit specific attractions (18%).
- The majority of visitors expected to tour around and explore (78%), experience our nation's/Australia's history (73%), spend quality time with others (73%), relax and rejuvenate (68%), discover and learn something new (67%) and experience arts or culture (56%).
- The expectation for experiencing our nation's/Australia's history discover, learning something new, experiencing arts or culture and something for the kids were above both benchmarks.

# What did they do in Ballarat/Bendigo?

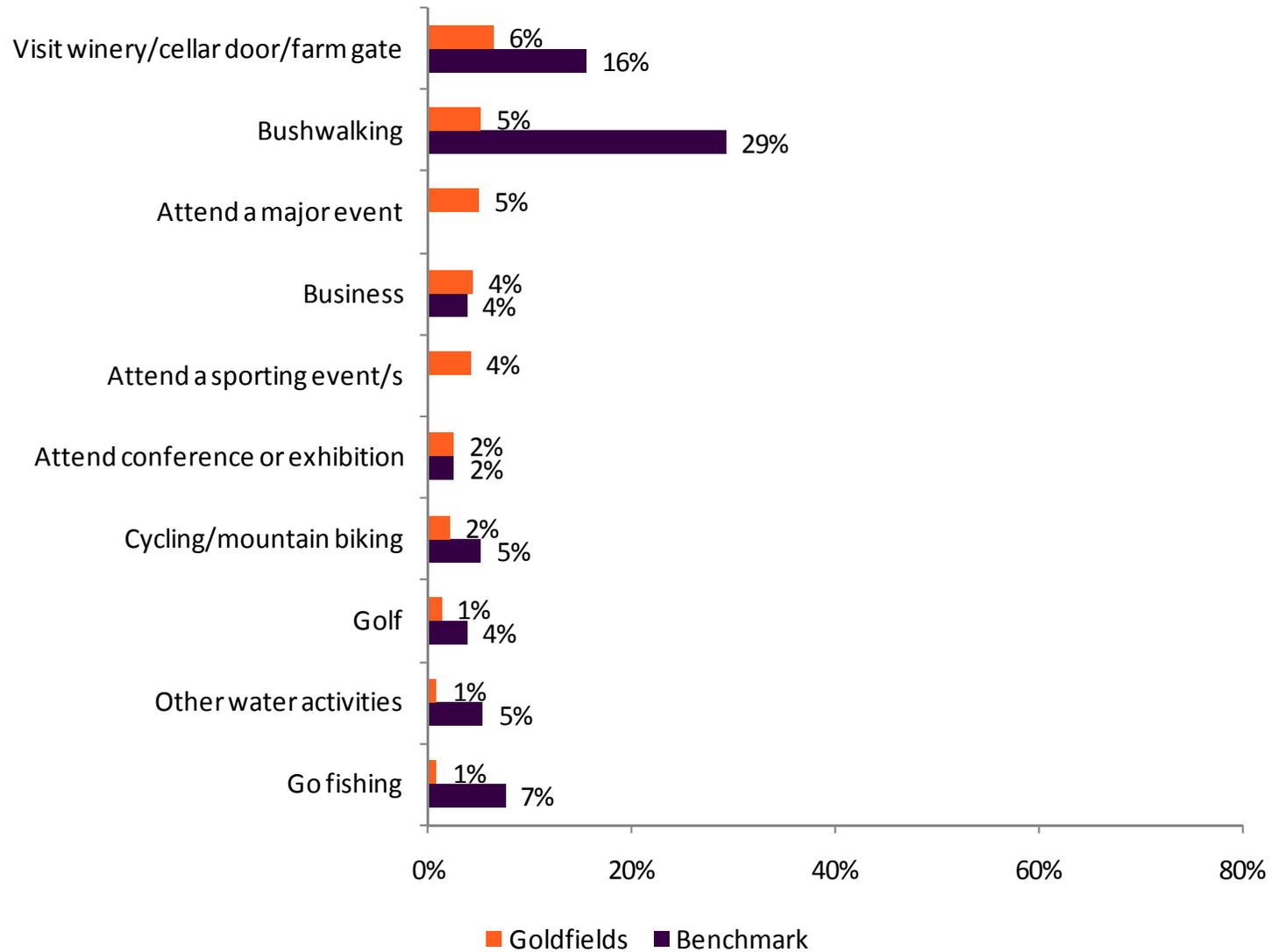
- Activities
- Attractions

# General sightseeing and eating out were the most common activities



This chart continued on next slide.....

..... continued from previous slide



Base = 487

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

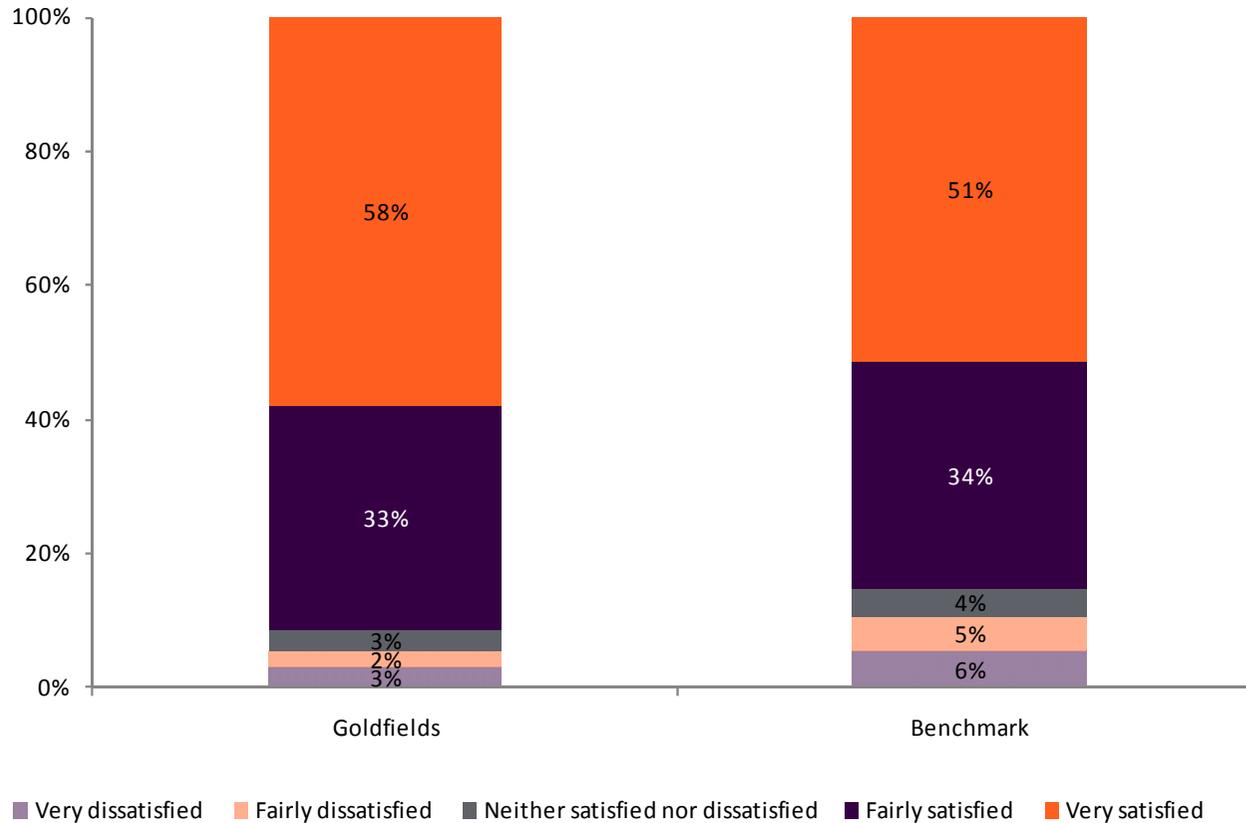
# Summary

- The activities undertaken by the majority of visitors to the Goldfields included general sightseeing (57%) and eating out (56%). Both proportions were less than both benchmarks.
- The proportion of visitors visiting botanical gardens (43%), history/heritage buildings (38%) and museums or art galleries (34%) were above the benchmarks.

# Visitor satisfaction in Ballarat/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

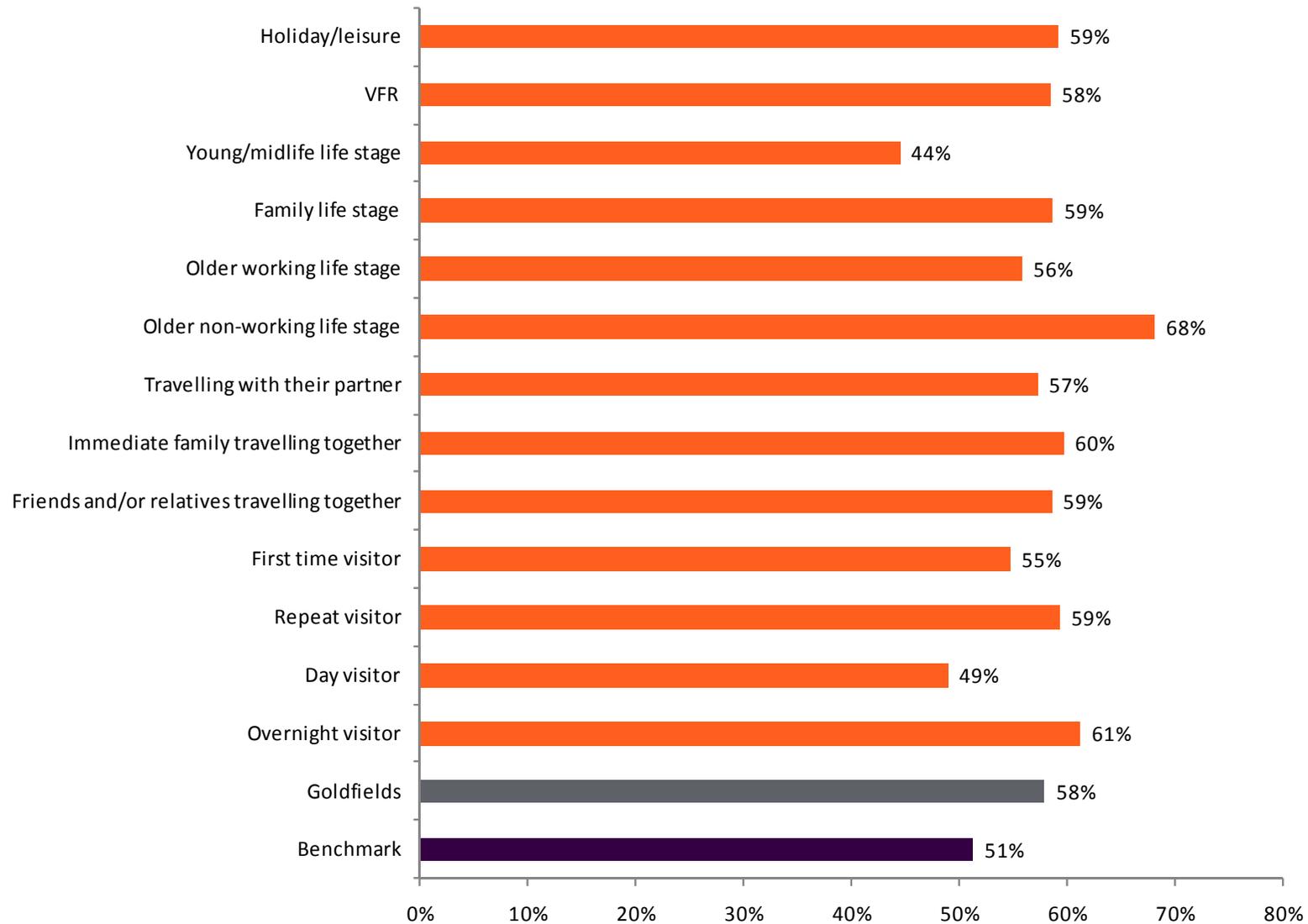


Key Metrics	Total Sat	V Sat	Total Dis
<b>Overall Satisfaction</b>	<b>91%</b>	<b>58%</b>	<b>5%</b>
Difference to subgroup	3%	1%	-3%
Difference to all	6%	7%	-5%

Base = 487

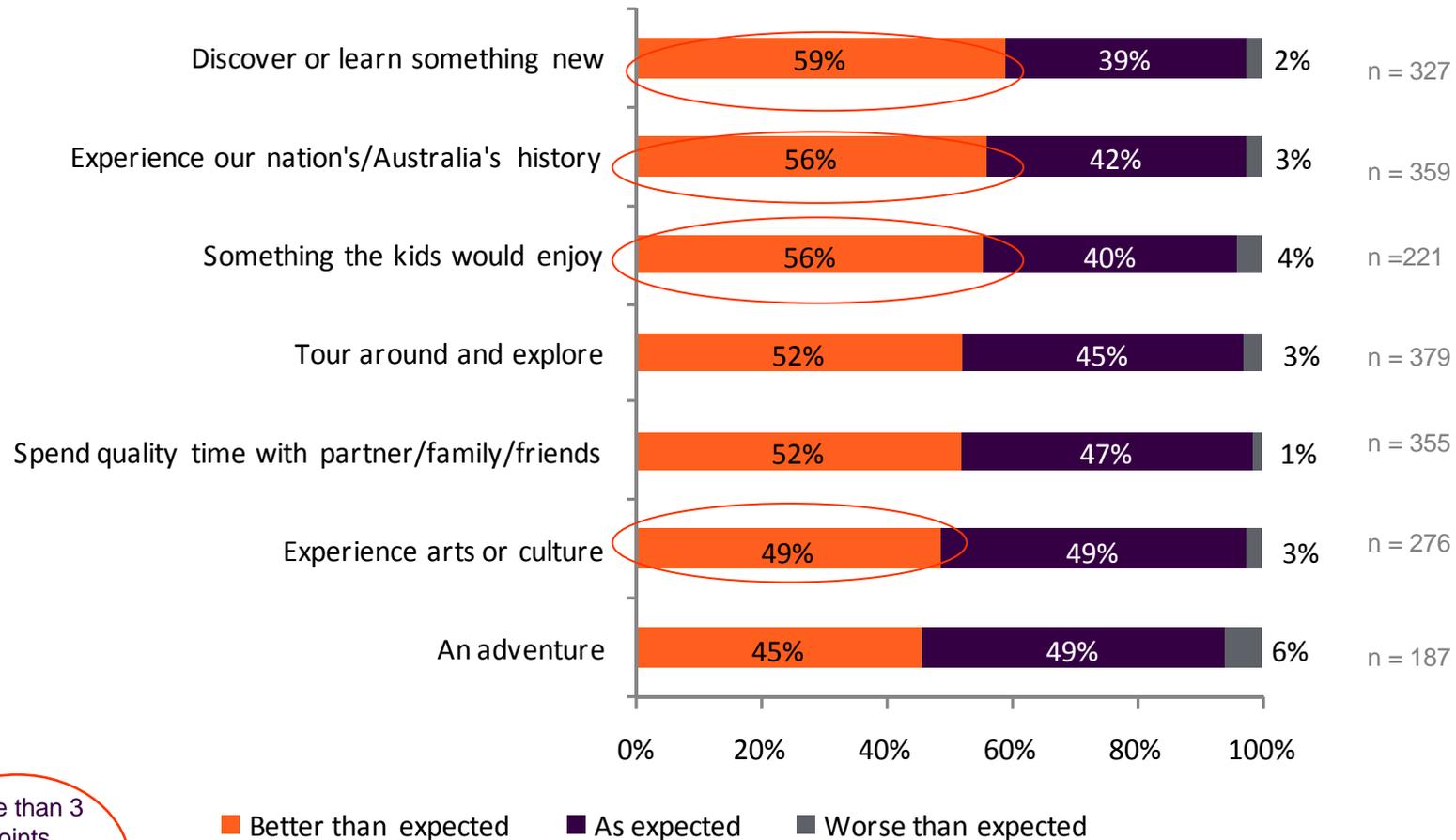
“Overall, how satisfied or dissatisfied were you with your experience at Ballarat/Bendigo?”

# Overall satisfaction was lower for day visitors and younger visitors



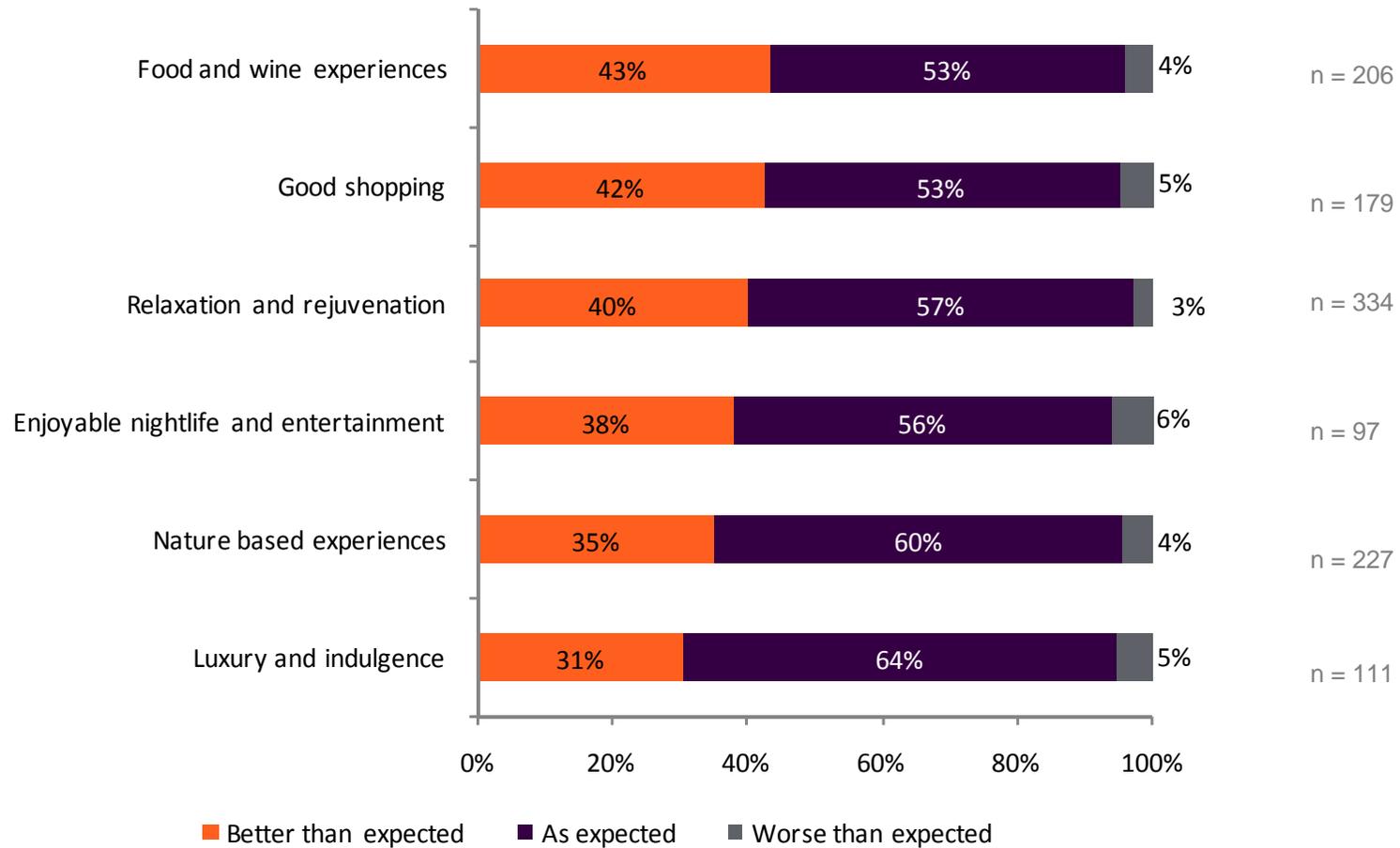
*"Overall, how satisfied or dissatisfied were you with your experience at Ballarat/Bendigo?"*

# The experiences visitors expected of the Goldfields were rated as better than expected



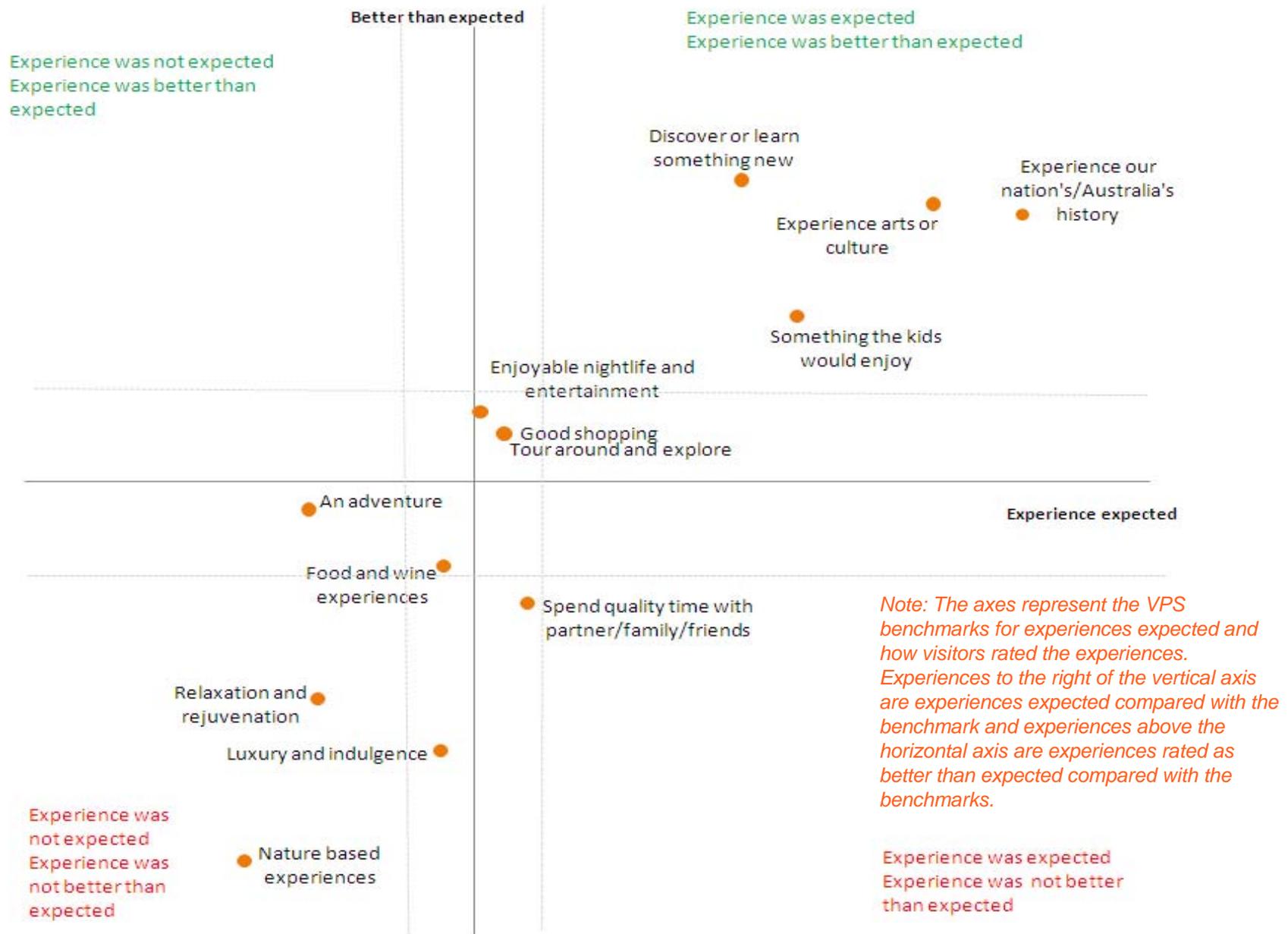
This chart continued on next slide.....

..... continued from previous slide



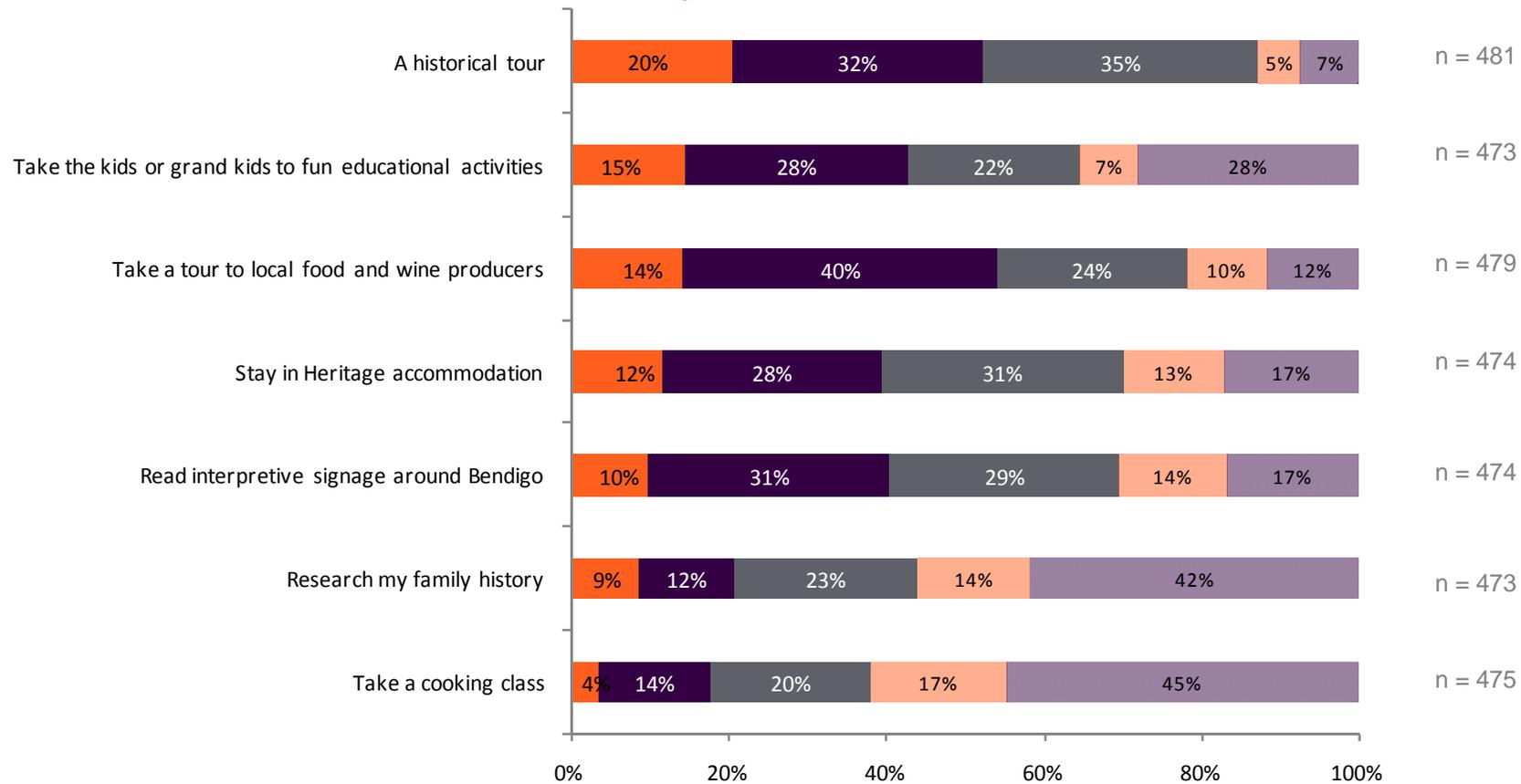
More than 3 points above the VPS benchmark

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



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

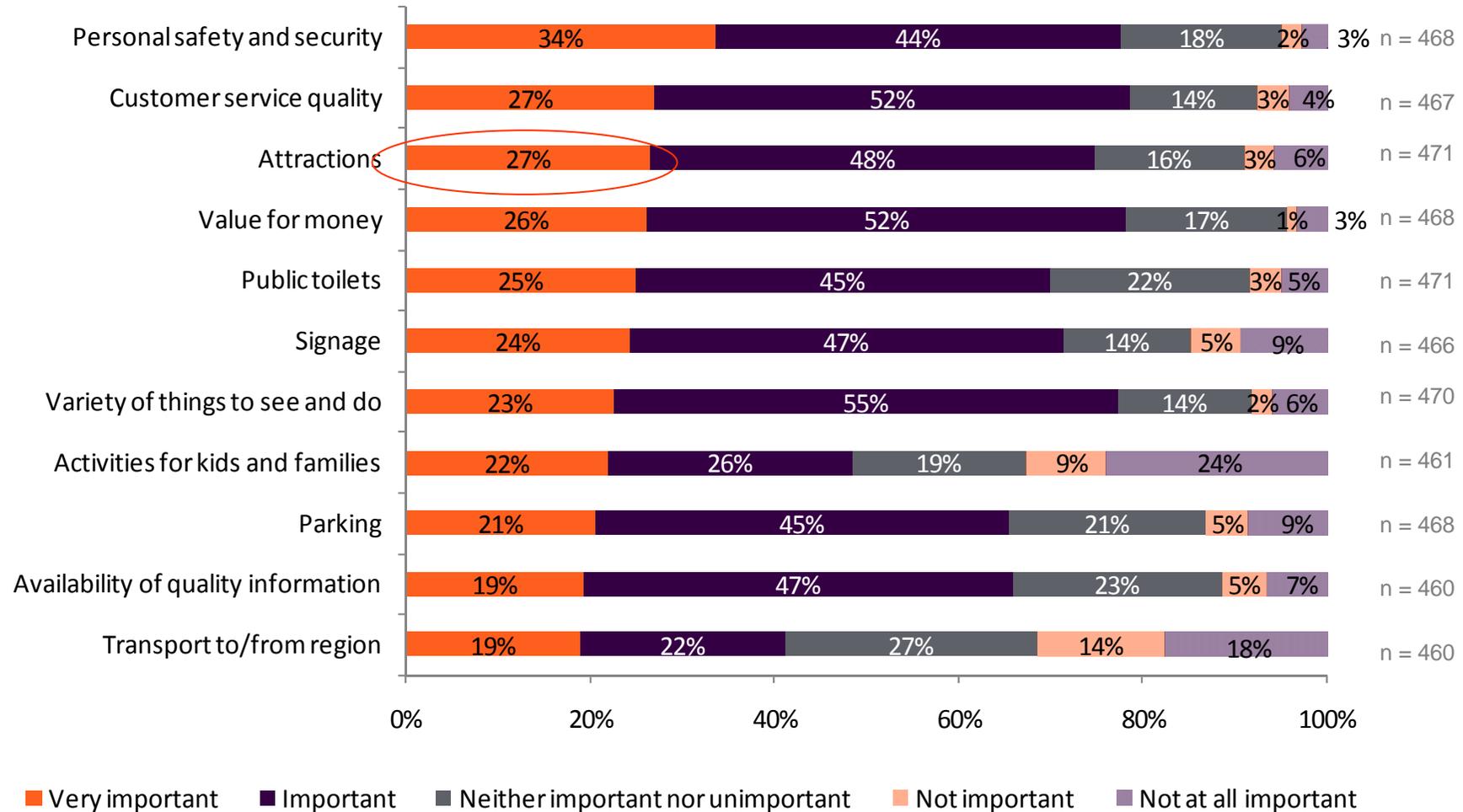
# Just over half of visitors were interested in tours around history and food and wine



- 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 Ballarat/Bendigo?”*

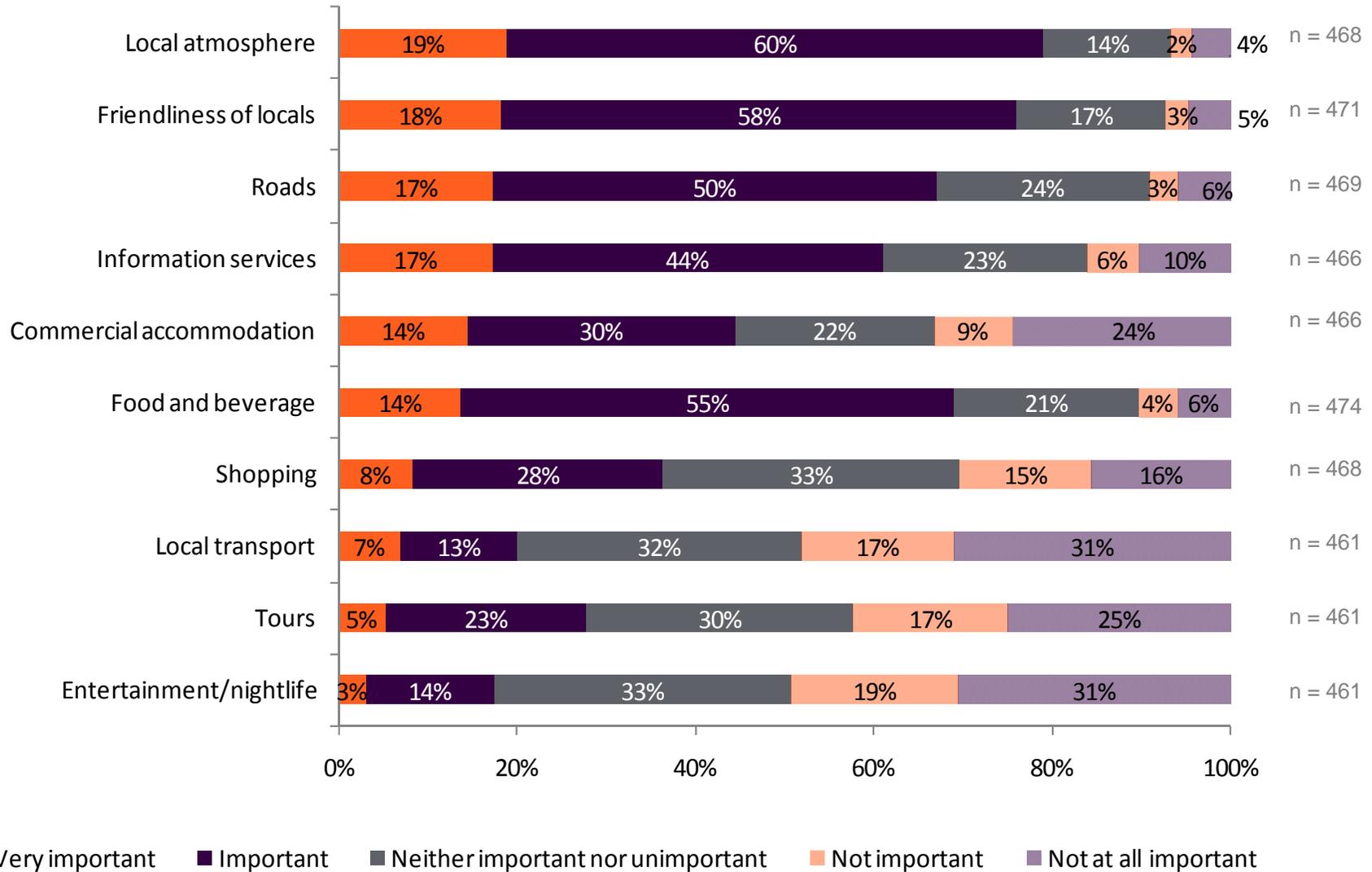
# Personal safety, the attractions and customer service were most important to visitors



More than 3 points above the VPS benchmark

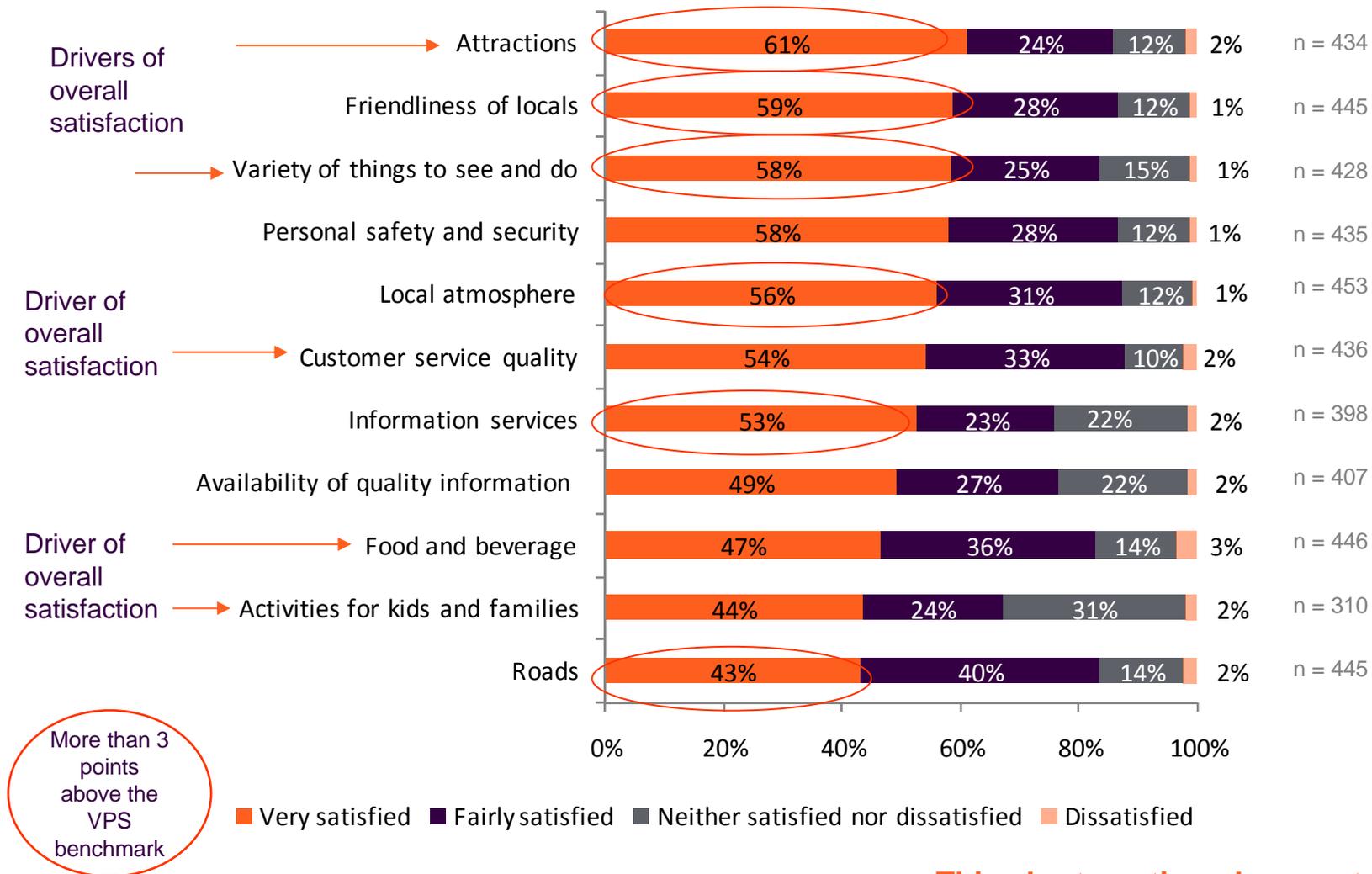
This chart continued on next slide.....

..... continued from previous slide



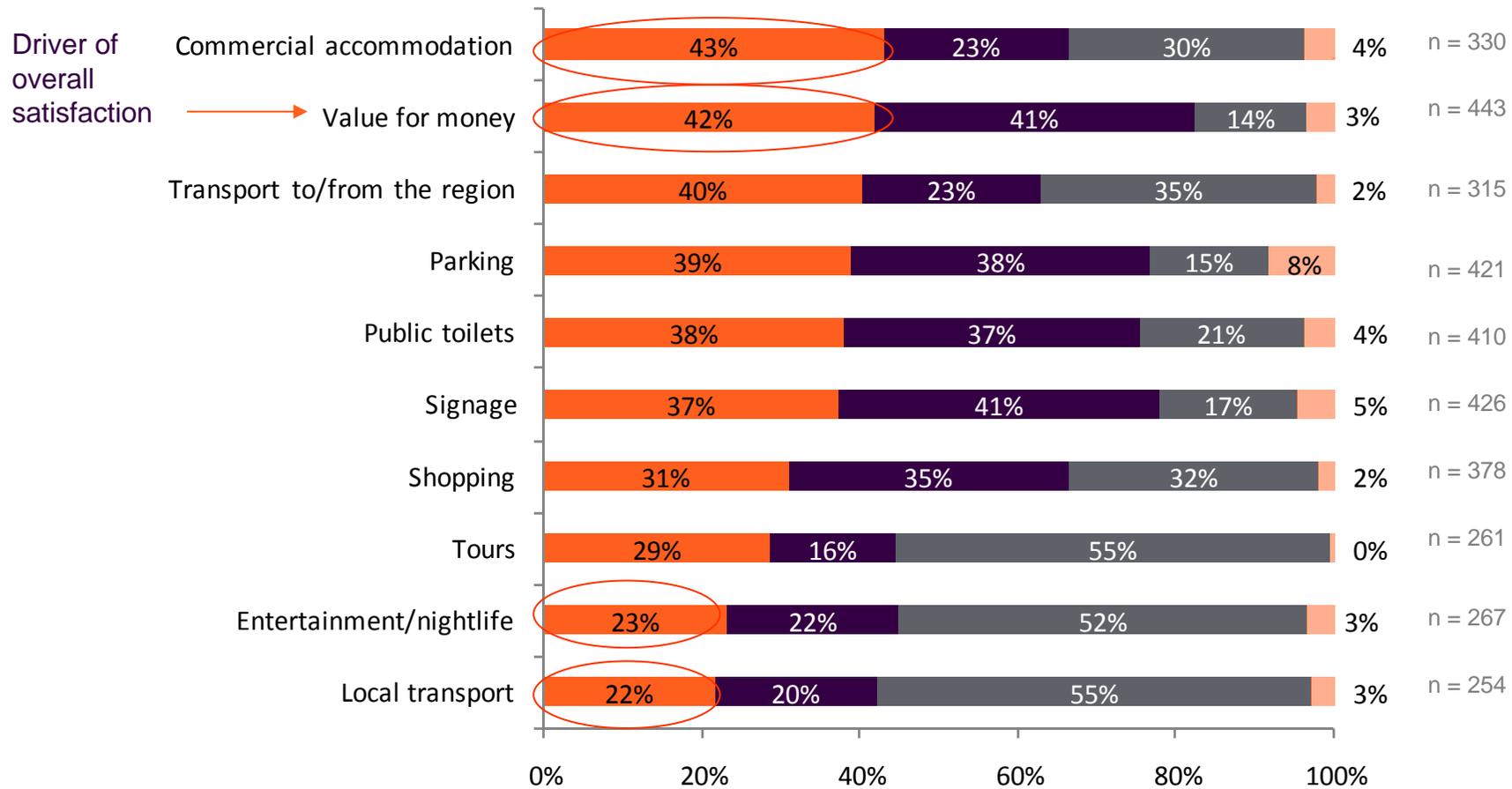
*"Again, thinking about your most recent trip to Ballarat/Bendigo, how important or unimportant was ..."*

# There were a number of attributes where satisfaction was above the benchmarks



This chart continued on next slide.....

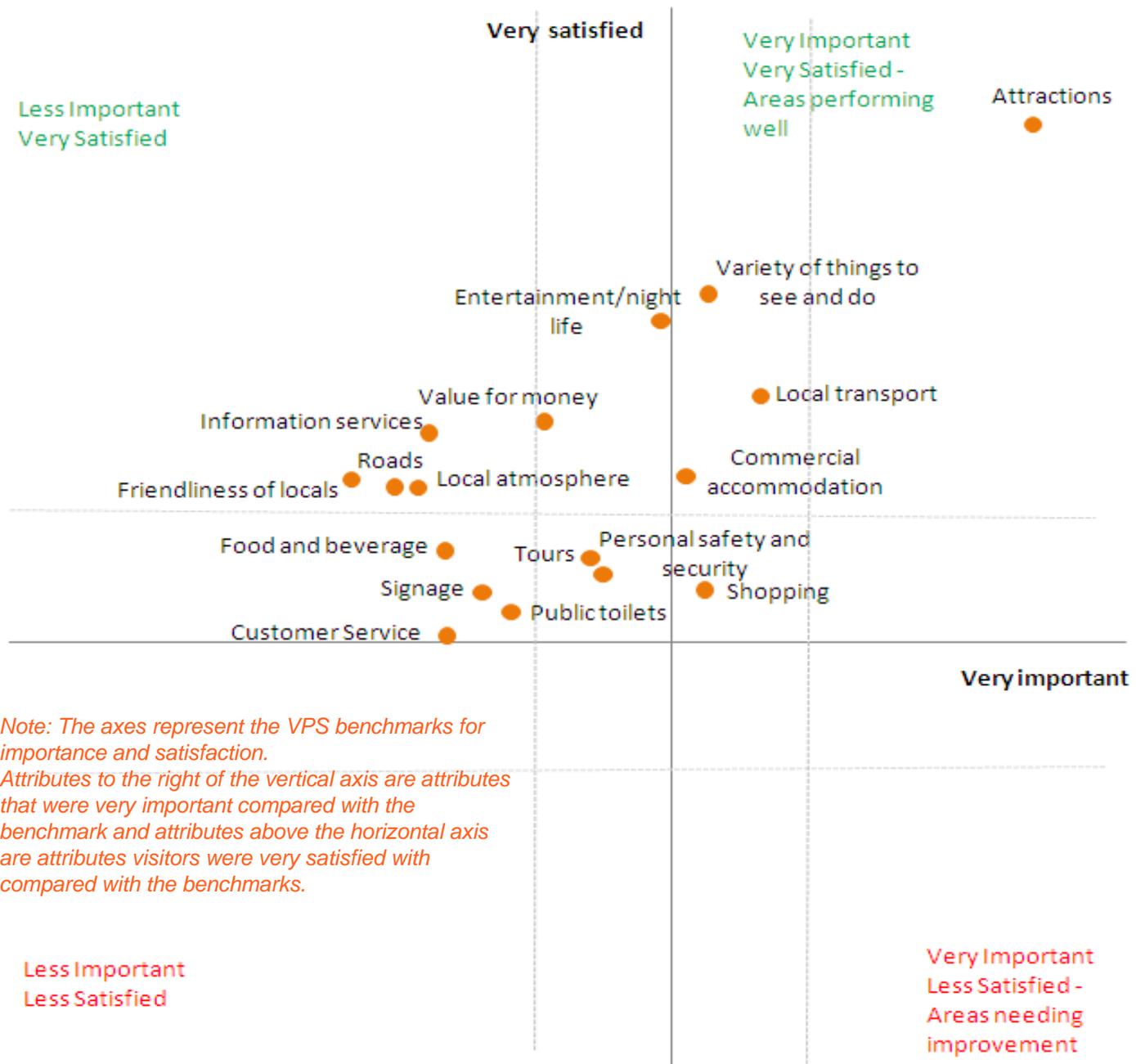
# ..... continued from previous slide



More than 3 points above the VPS benchmark

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

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



*Note: The axes represent the VPS benchmarks for importance and satisfaction. Attributes to the right of the vertical axis are attributes that were very important compared with the benchmark and attributes above the horizontal axis are attributes visitors were very satisfied with compared with the benchmarks.*

*“Again, thinking about your most recent trip to Ballarat/Bendigo, how important or unimportant was ...”  
“And how satisfied or dissatisfied were you with....”*

# Visitors were happy with the variety of things to do and attractions

- *'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 the variety of things to do and attractions

- 'I enjoyed Sovereign Hill and the people who wore costumes to make the 'city' more real.' (25-34 years, First time visitor)
- 'I was very impressed with the guided tour of the Art Gallery as well as the material they have on display. The botanical gardens were pretty special too.'(55-64 years, First time visitor)
- 'Range & quality of tourist attractions & ease of getting around by foot, car & public tpt.' (65+ years, Repeat visitor)
- 'We really like Ballarat, particularly Sovereign Hill and the Eureka Museum. This was our main purpose in going, to revisit the highlights of what we had seen two years earlier when we had stayed at Ballarat for a week. Great City.' (35-44 years, Repeat visitor)
- 'That Lake Wendouree has water in it & is full of wildlife, such a beautiful site.' (35-44 years, Repeat visitor)
- 'Incredible beauty and serenity of botanical gardens and parks near Lake Wendouree - paradise...' (35-44 years, Repeat visitor)

*"What else about Ballarat 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 local atmosphere and friendliness of the locals

- *'A very relaxed friendly place to get away from home for a day a shame we didn't have longer maybe next time.'* (45-54 years, Repeat visitor)
- *'The climate was lovely, the locals were very friendly and the township was delightful.'* (55-64 years, Repeat visitor)
- *'The people and the culture are wonderful. There are ample activities and places to visit to keep us occupied. The weather was great.'* (25-34 years, First time visitor)
- *'The ambience of the town and the way in which it has preserved its unique character.'* (65+ years, Repeat visitor)
- *'Love the heritage, the different things you can do that are for free. Love the quiet, relaxing atmosphere and the people are very friendly and helpful.'* (55-64 years, Repeat visitor)
- *'Very impressed with old buildings, cleanliness of town and service we received from locals.'* (65+ years, First time visitor)

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

# Visitors were happy with the quality of the food and beverage in Bendigo

- *'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 happy with the value for money

- *'Value for money. Great attractions' (55-64 years, Repeat visitor)*
- *'Value for money for us. Happy with motel accom. (Clean and comfy). Great weather. Nice people. Sorry love their bingo.'* (65+ years, Repeat visitor)
- *'Great travel costs and place to visit with children.'* (35-44 years, Repeat visitor)
- *'Availability of good quality motel accommodation at a reasonable price.'* (65+ years, Repeat visitor)

*"What else about Ballarat 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 unhappy with lack of public facilities and services

- *'Irregular public transport making travel between sights very slow as we ended up walking. Maybe something like a tourist hop on hop off bus would work with a circuit of the key sites like Sovereign Hill, Zoo, Eureka and the lake and Botanic Gardens.'* (45-54 years, First time visitor)
- *'Many shops not open on a Sunday and close early on Saturday.'* (45-54 years, Repeat visitor)
- *'Was hard to find a public toilet close to the children's playground at lake Wendouree.'* (35-44 years, First time visitor)
- *'Would have liked to have had some free camps with toilets for self contained motor homes available. May have stayed longer if that had been an option.'* (35-44 years, First time visitor)
- *'I visit Ballarat every week, there are no decent clean, secure public toilets in the CBD.'* (55-64 years, Repeat visitor)
- *'Lack of public toilets especially around the lake area - near the big playground....very poor when you have young children needing to go NOW!.'* (55-64 years, Repeat visitor)

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

# Visitors were unhappy with lack of public facilities and services

- *'The congestion of traffic in the city was a pain to deal with.'* (25-34 years, Repeat visitor)
- *'Traffic chaos 5:00 pm workdays.'* (65+ years. Repeat visitor)
- *'Parking at performing arts venue.'* (25-34 years, Repeat visitor)
- *'Didn't like having to pay for parking on a Saturday afternoon to go to the gallery.'* (55-64 years, Repeat visitor)
- *'Parking at Wendouree entertainment centre was terrible for a place that would be expecting big crowds.'* (35-44 years, Repeat visitor)
- *'Parking in Ballarat CBD is poor (not enough parking).. High gutters along Sturt St & cobble stones make it dangerous for older people to get around.'* (65+ years. Repeat visitor)
- *'Had difficulty with caravan signage. Too infrequent and petered out before we found the van park. Parking is atrocious, especially for campervan and being mainly maximum of 2hrs - not long enough to effectively visit sights. Had to abandon city walk before completion.'* (55-64 years, Repeat visitor)
- *'Some streets signs were missing or obscured, making navigation difficult.'* (65+ years. First time visitor)

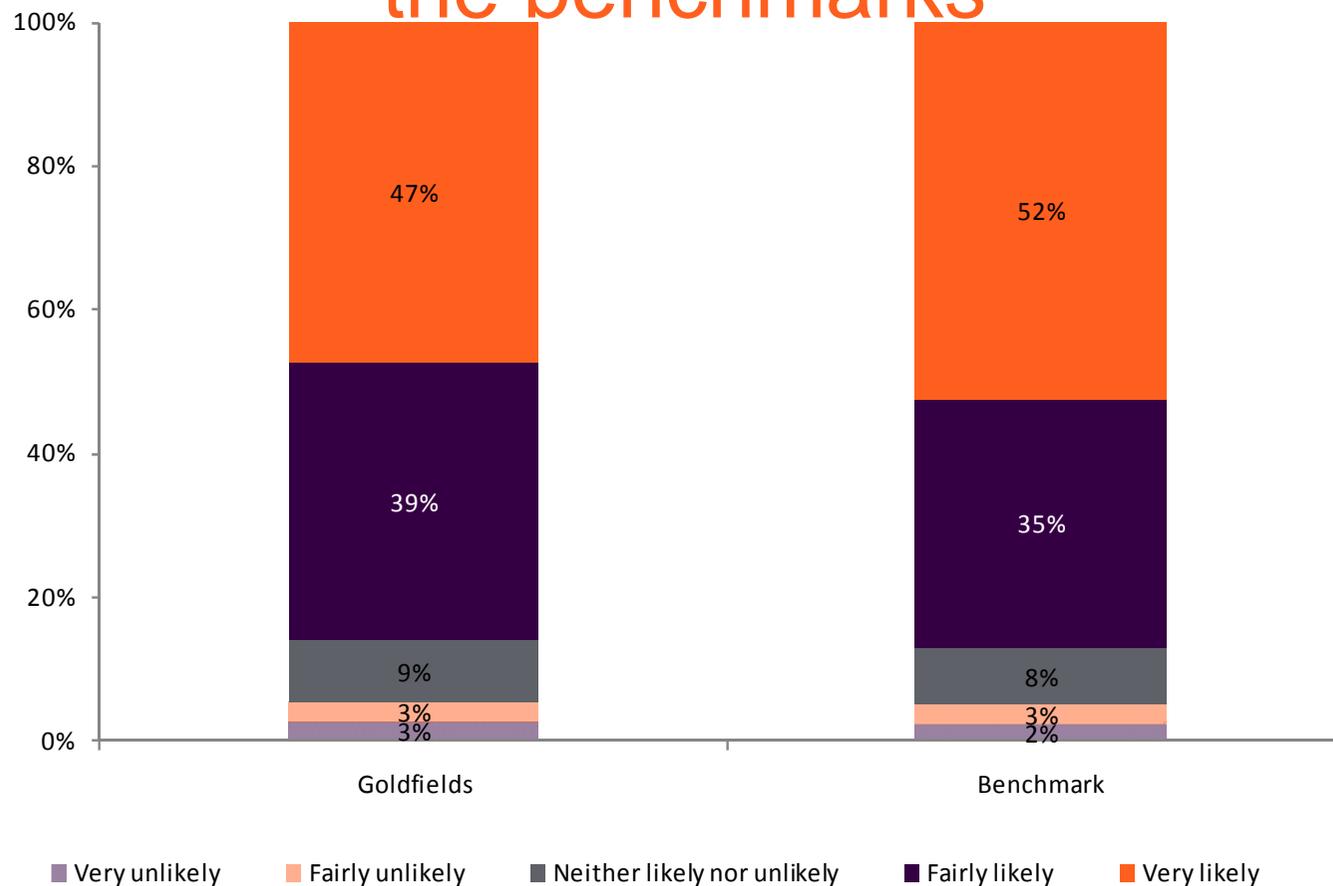
*"What else about Ballarat were you particularly unhappy with on your recent visit?"*

# Visitors were unhappy with the prices of some attractions and accommodation

- *'Some attractions are a little bit expensive for our price range - eg. Sovereign Hill' (15-24 years, Repeat visitor)*
- *'Although Sovereign Hill was great, I thought it was disappointing that even though we paid to get in, many activities inside the complex still cost more money.'* (35-44 years, First time visitor)
- *'Unhappy that Sovereign Hill didn't offer discounted two day entry. Wanted to go to Gold Museum on Thursday afternoon and Sovereign Hill on Friday day. Too much in one day. Would have to pay extra to do gold museum on different day. Plenty at Sovereign Hill for two days.'* (35-44 years, Repeat visitor)
- *'Entry at Sovereign Hill quite expensive & then still having to pay extra for coach rides, tunnel tours etc.'* (35-44 years, Repeat visitor)
- *'The cost to get into places e.g. Sovereign Hill.'* (65+ years, First time visitor)
- *'Expensive for Sovereign Hill and the light show.'* (15-24 years, First time visitor)

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

# A similar proportion of visitors were likely to recommend the Goldfields compared with the benchmarks

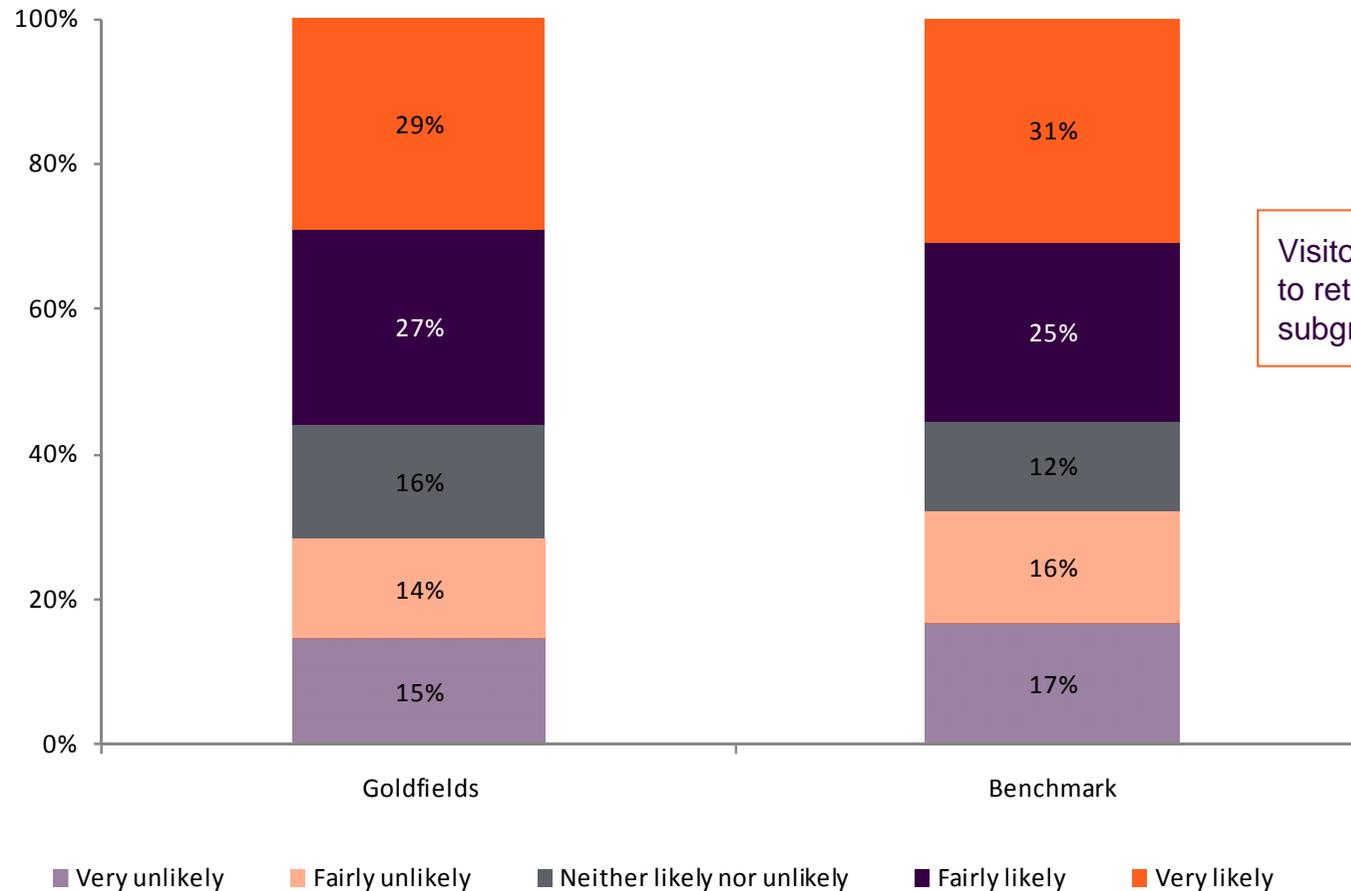


Key Metrics	Total Likely	V Likely	Total Unlikely
<b>Recommend</b>	<b>86%</b>	<b>47%</b>	<b>5%</b>
Difference to subgroup	↘ -2%	↘ -6%	↘ 1%
Difference to all	↘ -1%	↘ -5%	↘ 0%

Base = 486

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

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



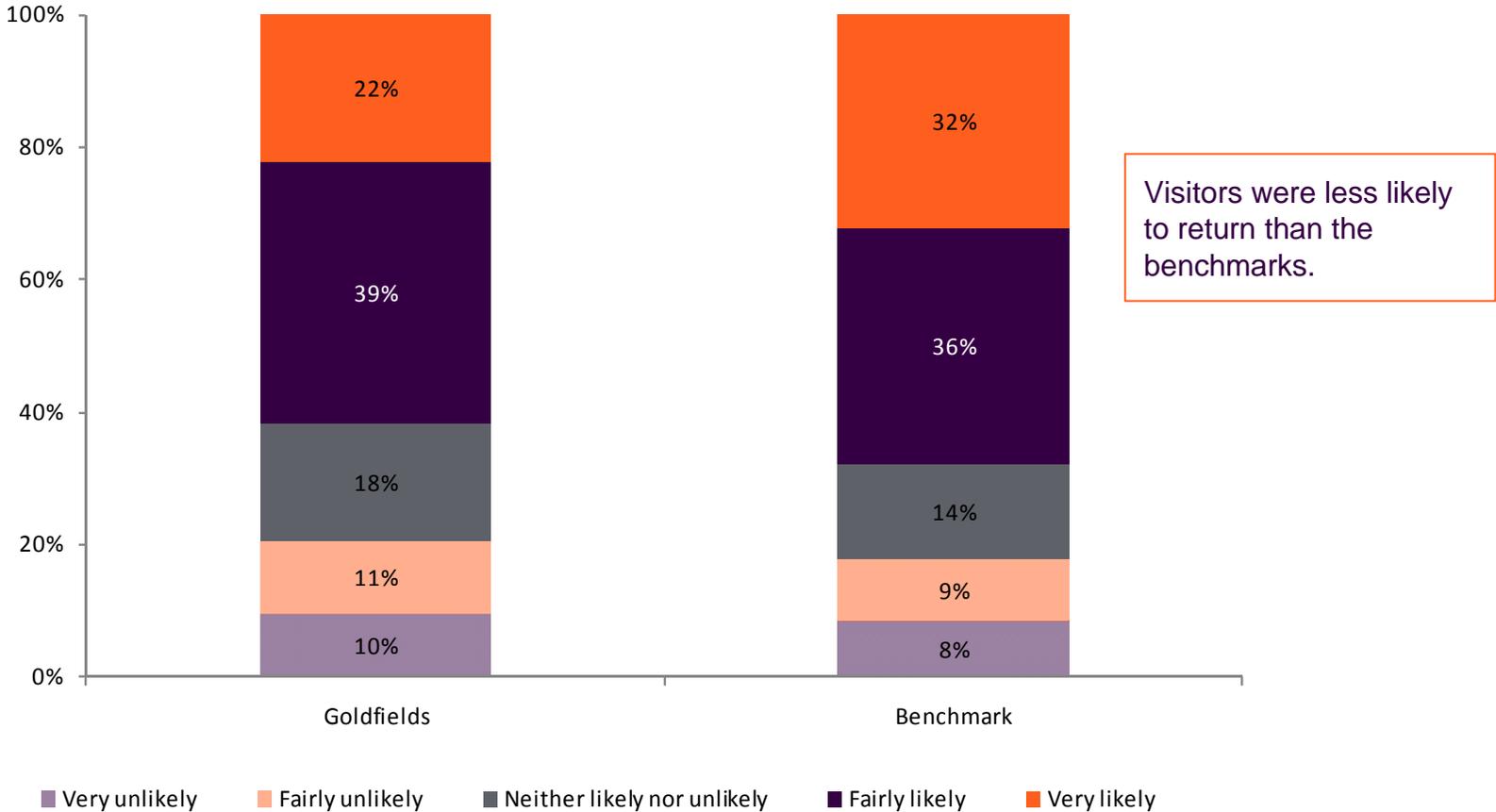
Visitors were less likely to return than the subgroup benchmark.

Likelihood to Return	Total Likely	V Likely	V Unlikely
<b>... in 12 months</b>	<b>56%</b>	<b>29%</b>	<b>15%</b>
Difference to subgroup	↓ -4%	↓ -5%	→ 2%
Difference to all	→ 0%	→ -2%	→ -2%

Base = 487

“How likely are you to return to Ballarat/Bendigo in the next 12 months?”

# Over six in ten visitors were likely to return in 3 years



Likelihood to Return	Total Likely	V Likely	V Unlikely
... in 3 years	62%	22%	10%
Difference to subgroup	↓ -9%	↓ -13%	→ 2%
Difference to all	↓ -6%	↓ -10%	→ 1%

Base = 341

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

# Summary

- Nearly three in five visitors (58%) were very satisfied with their visit to the Goldfields. This was a greater proportion than both benchmarks.
- Although most visitor segments were generally very satisfied with their visit, there was lower satisfaction for day visitors (49%) and young/midlife life stages (44%) than visitors in general.
- Expectations were better than expected for discovering and learning something new (59% better than expected), experiencing our nation's/Australia's history (56%), something for the kids to enjoy (56%) and experiencing arts or culture (49%) compared with the benchmarks.
- In terms of developing new experiences, just over half of visitors were interested in tours being developed around history (52%) and food and wine producers (54%).
- In terms of the functional attributes of the visit to the Goldfields, personal safety and security, customer service and the attractions were most important to visitors.
- Value for money, activities for kids and families, attractions, customer service and food and beverage were the main drivers of overall satisfaction with the Goldfields.

# Summary

- Of the attributes benchmarked, the satisfaction with all attributes were above the VPS benchmarks with the exception of personal safety and security (57% very satisfied), customer service quality (54%), food and beverage (47%), public toilets (37%), signage (36%), shopping (31%) and tours (29%). The satisfaction with these attributes were similar to the benchmarks.
- From the open ended comments, some visitors were unhappy with traffic congestion, parking (not enough and cost), signage, lack of public toilets and the costs of some attractions and accommodation.
- About 86% of visitors were likely to recommend the Goldfields, a similar proportion to the benchmarks.
- About 56% of visitors were likely to return to the Goldfields 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
<b>Overall Satisfaction</b>	<b>92%</b>	<b>58%</b>
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



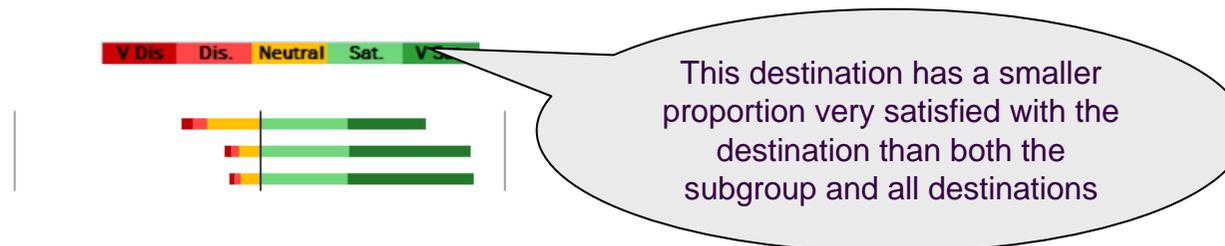
34% of respondents  
travelled to the  
region to visit  
friends and relatives

That is 16  
percentage points  
more than the  
subgroup

# Benchmark summary

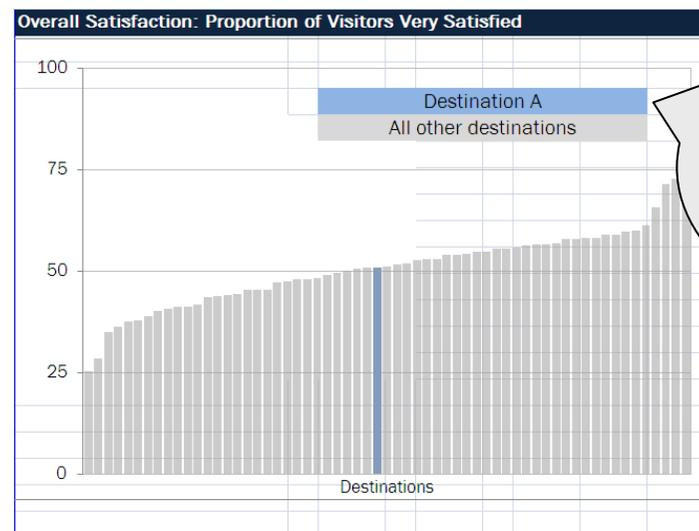
Bar charts: The small horizontal bar charts on the second page show the full results (that is all points on the scale) for the respective categories

- 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.