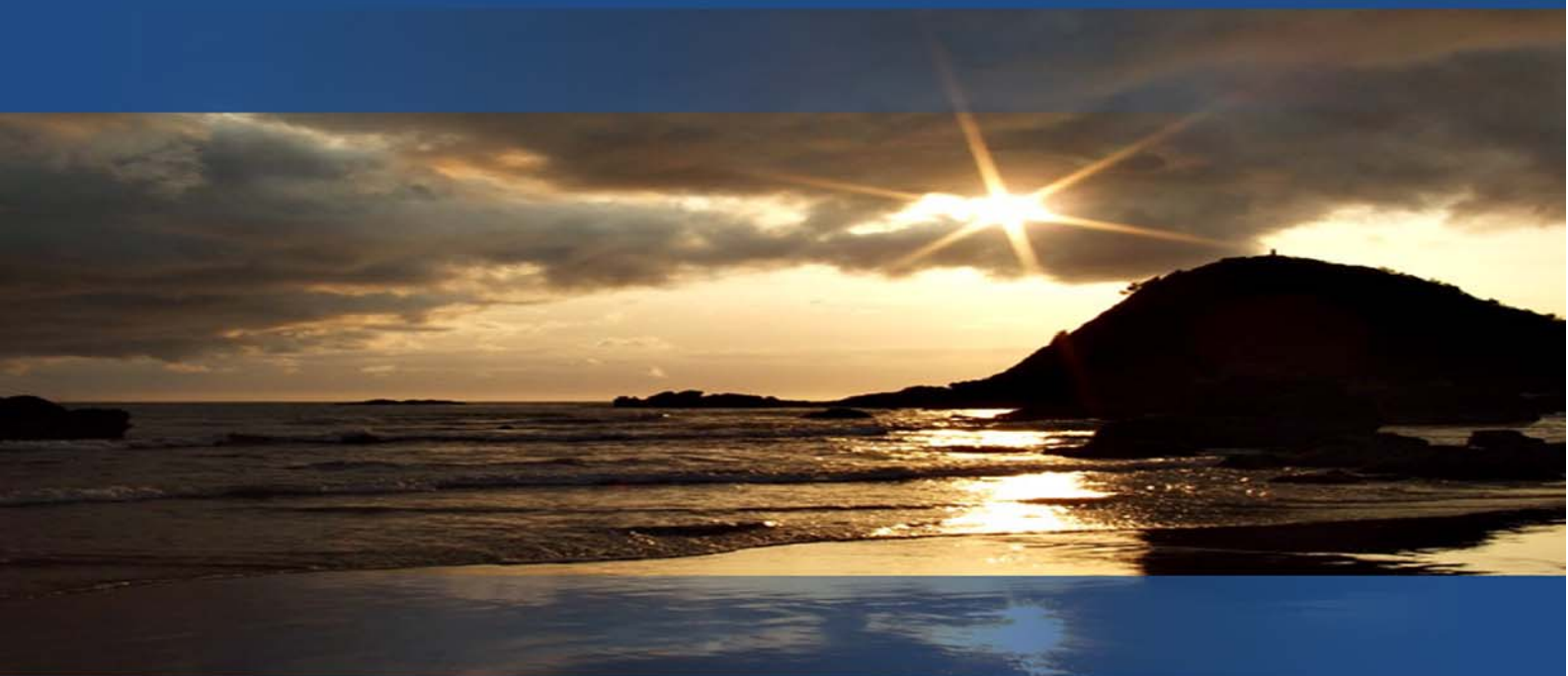


# Bass Coast Shire Tourism Research

Tourism Research and Economic Impact Study 2009

Bass Coast Shire Council

APRIL 2010



URBAN PLANNING • LAND ECONOMICS • TOURISM PLANNING

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# EXECUTIVE SUMMARY

The data provided in this report relates to the tourism industry in Bass Coast Shire. It provides a comprehensive overview and analysis of visitor markets, holiday home owners and the economic impact of tourism in the Shire. The data has been sourced primarily through a visitor survey and holiday home survey conducted in Bass Coast Shire in 2009.

Bass Coast Shire covers approximately 865 square kilometres of coastal area including Phillip Island. Bass Coast Shire is approximately 1.5 hours drive from Melbourne and includes the main tourist destinations of Phillip Island, San Remo and Inverloch as well as a number of smaller villages and coastal towns.

## BASS COAST TOURISM INDUSTRY OVERVIEW

<b>BASS COAST SHIRE 2009</b>	<b>4.6 million visitors annually</b>	<b>2.6 million day trip visitors annually</b>	<b>2 million overnight visitors annually</b>	<b>\$1.05 Billion in aggregate output</b>	<b>2,350 Jobs attributed to tourism</b>
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**Bass Coast Shire attracted 4.6 million visitors in 2009, of which 2.6 million were daytrip visitors and 2 million were overnight visitors. Of the total visitors to Bass Coast Shire, 3.1 million visited Phillip Island. Visitation has increased significantly since 2004; this is due to increased provision of accommodation and strengthening of tourism product.**

**Visitors to Bass Coast Shire contributed \$1.05 billion to the local economy (aggregate output), whilst 2,350 jobs were attributed to tourism in the Shire.**

When compared with the previous estimate of tourist visitation in 2004, the 2009 visitation data is significantly higher. The reason for this is as follows:

- The visitation model used in 2009 accounts for visitors staying with friends and relatives at their permanent home, the previous model did not;
- There has been a significant increase in holiday homes in Bass Coast Shire and correspondingly a significant increase in visitors staying in holiday homes;
- There has been a substantial increase in the supply of tourist accommodation facilities.
- Key daytrip destinations on Phillip Island have strengthened their product offer such as the Phillip Island Motor Racing Circuit and Phillip Island Nature Park as well as growth in other events such as the Pyramid Rock Music Festival.

## DAY TRIP VISITORS

Phillip Island and its iconic attractions (Penguin Parade and GP Circuit) remain the key drawcard for daytrip visitors to Bass Coast Shire. Bass Coast continues to attract a large proportion of international and interstate visitors with a high representation of visitors travelling in family groups.

The importance of the internet for motivation and visitor information and in car GPS systems for navigation cannot be understated. The use of E-technology in travel is now the primary method for collecting information for visitors prior to departure. Whilst visiting a region however, many visitors still prefer to have printed brochures and maps.

### ORIGIN

International visitors comprised a significant proportion of daytrip visitors to the Bass Coast Shire and were generally daytripping from Melbourne. The core reason for this is that there are a large number of tour companies providing organised daytrip tours specifically for the international visitor market. These tours take visitors from Melbourne directly to the Phillip Island Nature Park to visit the penguins and other native wildlife experiences. The greatest proportion of international daytrip visitors originated from the USA and UK while the greatest proportion of interstate visitors originated from NSW / ACT. Melbourne residents remained the most significant market for domestic daytrip visitors.

Emerging international markets include Singapore, India, Thailand, Hong Kong and Taiwan.

### PURPOSE OF VISIT/INFORMATION SOURCE/NAVIGATION

The majority of daytrip visitors stated that their main purpose of visit was for “holiday / leisure / getting away” while their motivation and main information source was the internet. Almost half of all day trip visitors used a Visitor Information Centre with the primary purpose to look for maps and brochures.

The majority of daytrip visitors accessed the Shire by car and a large proportion used a GPS system to navigate their way to Bass Coast Shire.

### TRAVEL GROUP

The following highlights the key findings in relation to travel groups to Bass Coast Shire:

- The most common age group of daytrip visitors were aged between 25 and 34 years (31%).
- The most common travel party was family groups (41%).
- The average number of people per travel group was 3.8 persons.
- The average expenditure per day trip visitor to Bass Coast Shire was \$66.

### ACTIVITIES

96% of daytrip visitors indicated that Phillip Island was their primary destination in Bass Coast Shire. This may be due to the large number of iconic attractions on Phillip Island especially when compared to the mainland. The most popular activity undertaken by daytrip visitors was “sightseeing” (75% of respondents), followed by those visiting “wildlife” (67%) and “eating out” at restaurants/cafes (43%).

The overwhelming majority of daytrip visitors stated that they associate Bass Coast Shire with Phillip Island (92%) while the majority of daytrip visitors associate Phillip Island with “wildlife” (77%).

## OVERNIGHT VISITORS

**Victoria remains the key market for overnight visitors to Bass Coast Shire, however there was also high representation from interstate visitors. The key international markets recorded included the USA and UK. Adult couples and mid-life family groups are the key visitor markets for Bass Coast Shire.**

**Most overnight visitors use the internet as their key information source, highlighting the importance of accurate, well presented and high quality websites.**

**Self contained accommodation was the most popular type of accommodation used by the survey respondents.**

### ORIGIN

The majority of overnight visitors were from Victoria (57%) while interstate visitors predominantly originated from NSW / ACT. The UK and US comprised the largest proportion of international overnight visitors to Bass Coast Shire.

Emerging international markets include Singapore, India, Thailand, Hong Kong and Taiwan.

### PURPOSE OF VISIT/INFORMATION SOURCE/NAVIGATION

The majority of visitors who were motivated to visit from advertising and promotional material listed the internet as their key motivational tool (38%), while the most common purpose of visit for overnight visitors to the Bass Coast Shire was for “holiday / leisure getting away”.

Almost three quarters of overnight visitors to the Bass Coast Shire stated that they used a Visitor Information Centre. 40% of respondents who used a Visitor Information Centre used it to gain information on local attractions. The majority of overnight visitors stated that they utilised the Internet to obtain information (68%) prior to departure. A large proportion of survey respondents staying in commercial accommodation which was booked through online with a Bass Coast Shire VIC, this explains the high use of the internet.

The majority of respondents accessed the Bass Coast Shire by car with the majority using road signage and in-car GPS to navigate their trip.

### TRAVEL GROUP

The age of overnight visitors to Bass Coast Shire is evenly distributed across all age brackets. The greatest proportion of overnight visitors were aged between 45 and 54 (21%), almost half of travel parties visiting overnight were family groups (47%).



The most common travel party visiting Bass Coast Shire overnight was groups of two (34%), while the average travel group size of overnight visitors was 3.7 persons. 60% of overnight visitors to Bass Coast Shire had visited previously, 53% had visited in the past 12 months.

#### ACCOMMODATION AND LENGTH OF STAY

A third of overnight visitors to the Bass Coast Shire stayed for two nights (32%) while the average length of stay for overnight visitors was 3.1 nights. Many respondents booked their accommodation through a VIC (40%), and half of visitors surveyed stayed in Cowes. The most common form of accommodation was self contained accommodation (22%).

#### TRENDS IN VISITATION

**The visitor markets to Bass Coast Shire have evolved over the period 2005-2009. The key changes to the visitor markets include:**

- **Growth in the proportion of interstate and international visitors to Bass Coast Shire, with strong growth in the USA and NSW markets;**
- **Decline in visitors from New Zealand and continental Europe;**
- **Growth in the adult couples market, and a corresponding decrease in the family market.**
- **Emergence of new visitor markets including Singapore, India, Thailand, Hong Kong and Taiwan.**

#### PURPOSE OF VISIT

There was an increase in the proportion of respondents visiting for entertainment / special event purposes in 2009 (14%) compared to 2005 (7%). Conversely, 2009 saw a decrease in the proportion of respondents visiting for touring or travelling reasons (5%) compared to 2005 (10%). This highlights the growing importance of events and key attractions in Bass Coast Shire in contributing to tourism.

#### ORIGIN

The proportion of respondents visiting Bass Coast Shire in 2009 from Victoria was considerably lower (63%) compared to 2005 (74%). This was countered by a significant increase in the proportion of interstate visitors in 2009 compared to 2005 (20% compared to 10%). The proportion of visitors from Queensland decreased from 21% in 2005 to 17% in 2009.

The proportion of visitors from the USA increased considerably between 2005 and 2009, rising from 10% in 2005 to 22% in 2009. Conversely, 2009 saw a sharp decline in the proportion of visitors from New Zealand, the Netherlands, France, Germany and Canada.

#### TRAVEL GROUP

The proportion of respondents who were travelling in a “family group” decreased from 52% in 2005 to 46% in 2009. The proportion of respondents visiting friends and relatives also decreased from 9% in 2005 to 5% in 2009. The proportion of visitors travelling in an adult couple increased from 21% in 2005 to 29% in 2009.

#### HOLIDAY HOME OWNERS

**The number of holiday homes in Bass Coast Shire has increased by almost 1500 houses in the period 2005-2009. Inverloch accommodated the majority of this growth.**

**A large proportion of holiday homes were purchased by new owners in the period 2004-2008, highlighting the importance of marketing activities and attractions directly to new holiday home owners who may be acquainting themselves with the area.**

**The economic impact of holiday homes increased significantly in the period 2004-2008 due to growth in the number of holiday homes and growth in home and garden maintenance expenditure in this period.**

**Melbourne City (postcode 3000) has emerged as the key location of permanent residence for holiday home owners. Melbourne did not even rank as a key market for holiday home owners in 2004. This may present a new trend in apartment owners also owning holiday homes to get away from high density living on weekends.**

#### LOCATION

There are an estimated 11,393 holiday homes in the Bass Coast Shire. This represents an increase of approximately 1,454 holiday homes since 2004. There are an estimated 5,913 holiday homes on Phillip Island which is approximately 37 more holiday homes than 2004. The majority of holiday homes in the Bass Coast Shire are located in Inverloch (33%), Cape Woolamai (15%) and Cape Paterson (14%).

#### OWNERSHIP

The vast majority of holiday homeowners (84%) live in metropolitan Melbourne. 20% of all holiday homeowners have owned their holiday home for less than 2 years, compared to 13% in 2004. 32% of all holiday homeowners have owned their holiday home for more than 11 years, compared to 43% in 2004. This highlights that holiday homes are turned over to new owners regularly. The main reason for purchasing a holiday home in the Bass Coast Shire was for the natural beauty of the area.

#### VISITATION

The average length of stay for visitors staying in holiday homes is 3.36 days per visit with an average of 26.4 visits per holiday home per year. Three quarters of visitors staying in holiday homes are owners and their families. Visitation and length of stay is higher in the summer months, while the actual visits made to holiday homes are generally steady throughout the rest of the year.

#### ACTIVITIES

In 2004 and 2008, the most popular activity undertaken by visitors staying in holiday homes is “going to the beach” (90% and 94% respectively), while “eating out” and “sightseeing” were the next most popular activities in both years.

#### EXPENDITURE

In 2008 visitors spent more money on food and drink than any of the other expenditure groups. This is a significant increase in expenditure compared to 2004. The average expenditure per person per visit is \$161 in 2008. This is a decrease when compared to average expenditure per person in 2004 of \$189.

An average of \$1,915 is spent each year on holiday home maintenance per home in Bass Coast Shire. For Phillip Island the average is \$1,815. Expenditure on holiday home maintenance is comparable to 2004 results of \$1,501 per home in Bass Coast Shire and \$1,275 in Phillip Island respectively.

# 1. INTRODUCTION

## 1.1. BACKGROUND

Urban Enterprise was commissioned by Bass Coast Shire Council to undertake a Tourism Research and Economic Impact Study. This project consisted of three modules:

Module 1: Visitor survey: A survey of visitors to Bass Coast Shire with results collected through intercept, self completion and internet surveys.

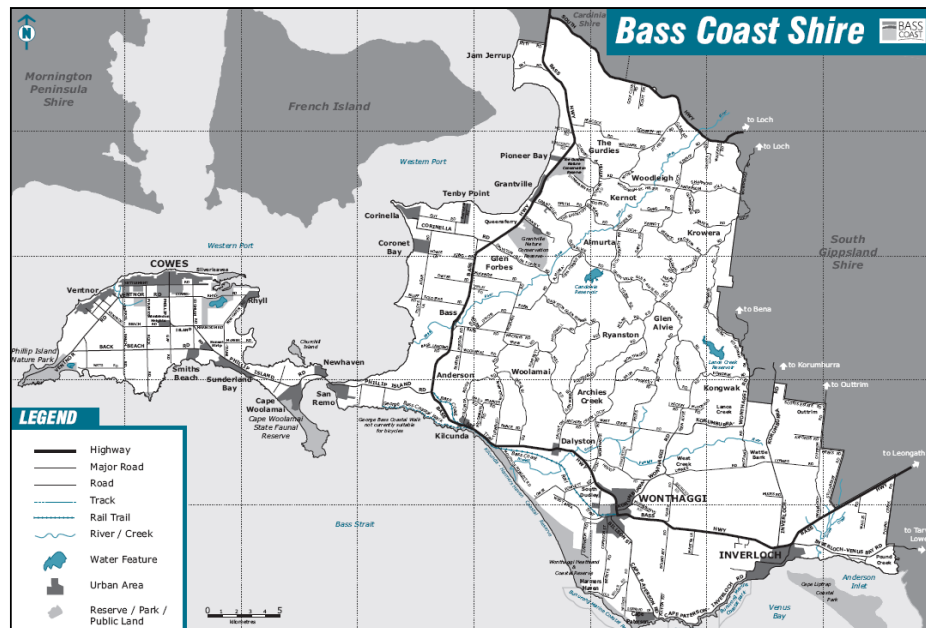
Module 2: Holiday home survey: A survey of holiday home owners mailed directly to the owner's primary place of residence.

Module 3: Tourism impact and PAVE modelling: Modelling to calculate visitation, employment and expenditure in Bass Coast Shire derived from tourism.

## 1.2. ABOUT BASS COAST SHIRE

Bass Coast Shire covers approximately 865 square kilometres of coastal area including Phillip Island. Bass Coast Shire is approximately 1.5 hours drive from Melbourne and includes the main tourist destinations of Cowes, San Remo, Inverloch, and Wonthaggi. Figure 1 shows the extent of Bass Coast Shire.

FIGURE 1 MAP OF BASS COAST SHIRE



Source: Bass Coast Shire Council, 2009

## 2. METHODOLOGY

### 2.1. INTRODUCTION

The following section outlines the methodology employed when collecting data for both the visitor and the holiday home surveys as well as the method for calculating the economic impact of tourism in Bass Coast Shire.

### 2.2. VISITOR SURVEY METHODOLOGY

#### 2.2.1. APPROACH

The visitor survey was conducted with visitors to Bass Coast Shire between the months of November and February including:

- An online survey which was sent to overnight visitors who stayed in the Shire over the 2008 / 2009 period;
- A visitor survey questionnaire was distributed to Visitor Information Centres for self completion by visitors;
- An intercept survey was conducted at a number of key tourist attractions in Bass Coast Shire.

#### 2.2.2. SAMPLE

##### INTERCEPT SURVEY

The survey team undertook an intercept survey at a number of strategic locations throughout Bass Coast Shire. These locations were chosen due to their popularity with tourists and would represent a broad cross section of visitors. The survey sites chosen included:

1. Phillip Island Visitor Information Centre;
2. Inverloch Visitor Information Centre;
3. Inverloch Town Centre;
4. Cowes Town Centre;
5. Nobbies Centre;
6. Churchill Island;
7. A Maze n' Things;
8. Phillip Island Chocolate Factory;
9. Silverwater Resort; and
10. Penguin Parade.

#### SELF ADMINISTERED SURVEY

A number of self-administered surveys were also circulated to VIC's throughout the Shire. The locations chosen for the self-administered surveys include:

1. Phillip Island Visitor Information Centre;
2. Cowes Visitor Information Centre, and
3. Inverloch Visitor Information Centre.

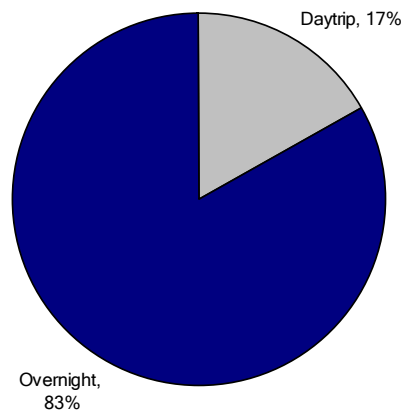
These sites were chosen as they have a significant amount of exposure to different tourist groups and subsequently it was expected that they would yield a variety of responses.

#### ONLINE SURVEY

A survey was prepared and sent to 2000 people who had registered their details with Visitor Information Centres in the Shire when making an accommodation booking. There were 358 responses to the online survey.

#### OVERNIGHT VERSUS DAY VISITORS

83% of survey respondents were overnights visitors, compared to 17% of respondents who were daytrip visitors.



#### SAMPLE ERROR

The sample comprises a total of 554 completed survey questionnaires. The majority of responses were from the intercept surveys conducted throughout the Shire. Intercept surveys ensured that the responses were of high quality as this allowed for questions to be accurately interpreted by the visitor.

The sample error for the overall results is +/-4.12% at the 95% confidence interval. This means that we can be sure that the overall results are within 4.12% of the actual results if we assume the survey was based on a random sample.

#### ADJUSTMENT TO SAMPLE

Two types of surveys were used to gather the visitor profile results for this project. One was a hard copy field survey (intercept and self completion) undertaken by Urban Enterprise staff members while the other was distributed to past visitors who had stayed overnight in the Shire between 2008 and 2009. This skewed the results towards overnight visitors. This was rectified by a day spent conducting intercept surveys for day trip visitors only. The survey comprised

mainly closed answer questions for visitors to respond to. A copy of the questionnaire is included in the appendix. Most questionnaires were completed accurately with high response rates.

An adjustment to the 2009 sample was made so that it matched the 2005 survey for the purpose of the trend analysis of this report.

### 2.3. HOLIDAY HOME RESEARCH METHODOLOGY

Holiday homeowners were identified using the Bass Coast Shire's rates database, using the following method:

- All residential properties were identified (non-improved or vacant land was excluded);
- Properties whose owners live outside the Bass Coast Shire were identified;
- Public or private company/business owners were excluded.

The database includes holiday homes occupied by their owners as well as homes available for short-term holiday rental.

A random sample of 6,000 holiday homeowners from the database were sent a questionnaire. Holiday homeowners had the option of completing the survey online or completing a paper-based survey and returning it to Council. The survey contained two parts:

- The first part contained questions relating to the economic impact of tourism and visitation. The results from this part are contained within this report.
- The second part contained questions establishing interest in leasing holiday homes/rentals to desalination workers and the property characteristics. A separate report has been produced for the Bass Coast Shire presenting the findings.

Information requested related to the calendar year 2008. Results have whenever possible been compared to data relating to the calendar year 2004. The data relating to the calendar year 2004 is derived from the Bass Coast Shire Economic Impact of Tourism report, dated December 2005, prepared by Urban Enterprise for the Bass Coast Shire Council.

1,290 responses were received from holiday homeowners, a 22% response rate.

#### RESPONSES UTILISED FOR HOLIDAY HOME USAGE/OWNER PROFILE SECTION

The holiday home usage/owner profile section of this report presents findings from all survey responses collected in which the survey respondent indicated that the property is used as a holiday home. Results for this section have been based on a survey pool of 1,202 responses.

The following formula was used for extrapolation.

$$\begin{array}{|c|} \hline \text{Averages for} \\ \text{completed surveys} \\ \hline \end{array} \times \begin{array}{|c|} \hline \text{Total holiday homes} \\ \text{in database} \\ \hline \end{array} = \begin{array}{|c|} \hline \text{Total number} \\ \hline \end{array}$$

### 2.4. ECONOMIC IMPACT OF TOURISM METHODOLOGY

This component of the study draws on primary and secondary research including:

- Population and Visitor Estimator (PAVE) model;

- Australian Bureau of Statistics (ABS) data;
- Tourism Satellite Accounts (ABS).

A summary of the methodology used to calculate the economic impact of tourism and the performance of the tourism sector in Bass Coast Shire is outlined below.

#### NUMBER OF VISITORS

The number of visitors to Bass Coast Shire has been calculated using Urban Enterprise's PAVE model. The model uses a number of algorithms which draw on local level accommodation data (number of establishments and guest rooms), ABS Survey of Tourist Accommodation data (occupancy rates) and National Visitor Survey data (visitor proportions).

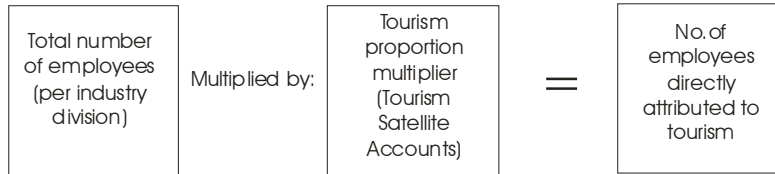
The model was developed to estimate visitation at the local level, using data specific to the local area. Other tourism impact models apply regional or state wide level multipliers which is less accurate.

#### VISITOR EXPENDITURE

Visitor expenditure is calculated by multiplying the number of daytrip and overnight visitors by the expenditure per visitor identified using the primary visitor research.

#### TOURISM EMPLOYMENT

The total number of employees by industry type is identified through Census Data (2006), provided by the Australian Bureau of Statistics. A tourism multiplier is then obtained from Tourism Satellite Accounts (provided by the Australian Bureau of Statistics) and used to calculate the number of employees directly attributed to tourism.





## 3. ECONOMIC IMPACT OF TOURISM

### 3.1. INTRODUCTION

The following section outlines the economic impact of tourism on the Bass Coast Shire economy. Specifically this section identifies the following:

- Number of visitors to Bass Coast Shire including specific analysis for Phillip Island and Inverloch;
- Expenditure by visitors to Bass Coast Shire and;
- Employment generated by tourism in Bass Coast Shire.

### 3.2. TOURISM

#### 3.2.1. NUMBER OF VISITORS

The Bass Coast Shire attracts over 4.6 million visitors annually, of which 2.6 million are daytrip visitors and 2 million are overnight visitors.

Phillip Island/San Remo area attracts 3.2 million of the total visitors to the Shire.

#### 3.2.2. VISITOR EXPENDITURE

##### *TOURISM'S CONTRIBUTION TO BASS COAST SHIRE ECONOMY*

Tourism contributes an estimated at \$1.05 billion to the Bass Coast Shire economy (aggregate output) in 2009.

##### *DIRECT EXPENDITURE*

Direct expenditure attributed to visitors to the Bass Coast Shire in 2009 is estimated at \$627 million, where \$455 million is attributed to overnight visitors and \$173 million is attributed to daytrip visitors.

ANNUAL VISITATION	Total Expenditure
Visitors Staying in Commercial Accommodation	\$161,069,249
Visitors Staying in Caravan Parks	\$56,796,937
<i>Visitors Staying in Paid Accommodation</i>	<i>\$217,866,186</i>
Visitors Staying in their Holiday Home	\$207,075,463
Visitors Staying with Friends and Relatives	\$29,731,870
<b>Total Overnight Visitors</b>	<b>\$454,673,519</b>
<b>Total Daytrip Visitors</b>	<b>\$172,527,000</b>
<b>Total Visitors</b>	<b>\$627,200,519</b>

PAVE, Economic Impact Modelling, Urban Enterprise

#### *INDIRECT EXPENDITURE*

Based on direct expenditure of \$627 million, indirect expenditure is calculated at \$422 million.<sup>1</sup>

### 3.2.3. EMPLOYMENT IN TOURISM

#### *EMPLOYMENT IN BASS COAST SHIRE ATTRIBUTED TO TOURISM*

2,352 jobs in the Bass Coast Shire are attributed to tourism, calculated using tourism satellite accounts. This includes direct and indirect impacts of tourism in the Shire.

This accounts for 31% of all jobs in the Bass Coast Shire demonstrating tourism is one of the key industry sectors in Bass Coast Shire.

The reason for this is that tourism provides not only direct impacts across industry sectors such as accommodation, restaurants, cafes and retail but also provides indirect employment impacts in the construction industry (new holiday homes or lifestyle properties) and service industries (real estate, cleaning services, linen services, service stations).

#### *DIRECT EMPLOYMENT*

There are 1,407 jobs in Bass Coast Shire directly attributed to the tourism industry.

“Accommodation and Food Services” had the highest number of jobs attributed to tourism, (859 employees). This is followed by “Retail Trade” with 371 jobs attributed to tourism and the “Health Care and Social Assistance Industry” with 48 jobs.

Appendix B provides an overview of persons employed directly in tourism.

#### *INDIRECT EMPLOYMENT*

Indirect employment attributed to the tourism industry in Bass Coast Shire is calculated at 946 persons. This is based on direct employment of 1,407 persons across a range of industry sectors.<sup>2</sup>

## 3.3. ESTIMATED TOURIST VISITATION

### 3.3.1. INTRODUCTION

This section of the report provides an overview of visitation for 2009 to the Bass Coast Shire, utilising Urban Enterprise’s PAVE model.

PAVE provides estimates on visitation to small areas by utilising a range of datasets including data from Tourism Research Australia, the Australian Bureau of Statistics as well as primary research undertaken by Urban Enterprise into the holiday home sector.

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<sup>1</sup> 962 x 0.673 (Tourism Impact Model Indirect Expenditure Multiplier)

<sup>2</sup> 1407 X 0.673 (Tourism Impact Model Multiplier for Indirect Employment)

### 3.3.2. BASS COAST SHIRE

#### VISITATION OVERVIEW

Table 1 shows the estimated annual visitation to the Bass Coast Shire as calculated by the PAVE model. An estimated 4.6 million people visited the Bass Coast Shire in 2009, including 2 million overnight and 2.6 million daytrip visitors.

27% of overnight visitors stay in paid accommodation (such as motels and caravan parks). The remainder stayed in their second (holiday) home or with friends or relatives.

Daytrip visitors include people visiting primarily for holiday leisure (72% of day-trippers). Daytrip visitors include visitors travelling more than 50 kilometres from their place of residence.

When compared with the estimate of visitation in 2004 in the Bass Coast Shire Economic Impact of Tourism Study, the 2009 visitation is significantly higher. The reason for this is as follows:

- The newer PAVE model accounts for visitors staying with friends and relatives at their permanent home, the previous model did not.
- There has been a 14% increase in holiday homes in Bass Coast Shire and correspondingly a significant increase in visitors staying in holiday homes;
- A substantial increase in the supply of tourist accommodation facilities.
- Key daytrip destinations on Phillip Island have strengthened their product offer such as the Phillip Island Grand Prix Circuit and Phillip Island Nature Park as well as growth in music events.

TABLE 1 ANNUAL VISITATION SUMMARY, BASS COAST SHIRE, 2009 (PAVE)

ANNUAL VISITATION	Visitor Days 2009	Total Visitors 2009	Total Visitors 2004
Number of Visitors Staying in Commercial Accommodation	789,522	414,390	188,649
Number of Visitors Staying in Caravan Parks	730,620	146,124	71,291
<i>Number of Visitors Staying in Paid Accommodation</i>	<i>1,520,142</i>	<i>560,514</i>	<i>259,940</i>
Number of Visitors Staying in their Holiday Home	4,321,302	1,286,183	1,159,762
Number of Visitors Staying with Friends and Relatives	369,339	184,670	N/A
<b>Total Number of Overnight Visitors</b>	<b>6,210,783</b>	<b>2,031,366</b>	<b>1,419,702</b>
<b>Total Number of Daytrip Visitors</b>	<b>2,620,000</b>	<b>2,620,000</b>	<b>2,000,000</b>
<b>Total Number of Visitors</b>	<b>8,830,783</b>	<b>4,651,366</b>	<b>3,419,702</b>

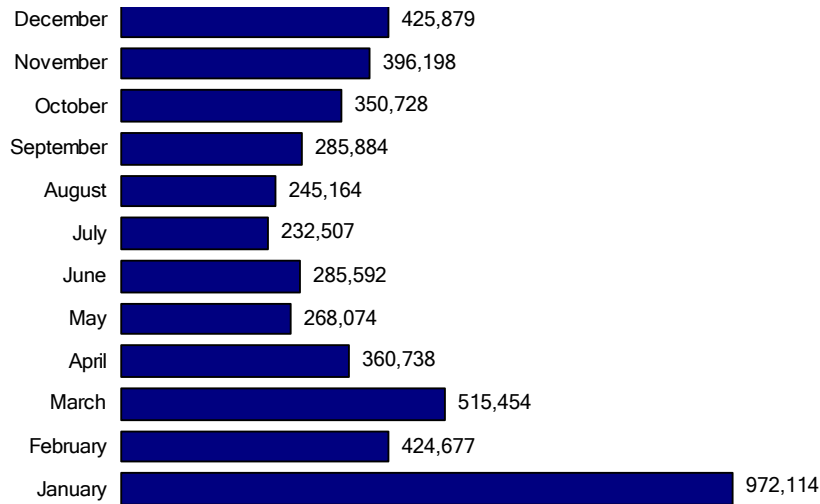
Source: PAVE, Urban Enterprise, 2010.

#### VISITATION BY MONTH

##### TOTAL VISITATION BY MONTH

Figure 2 shows the total visitation by month for Bass Coast Shire. The peak visitor population occurs in January. This highlights that Bass Coast Shire is traditional destination with peaks and troughs aligned to school holidays and the summer period.

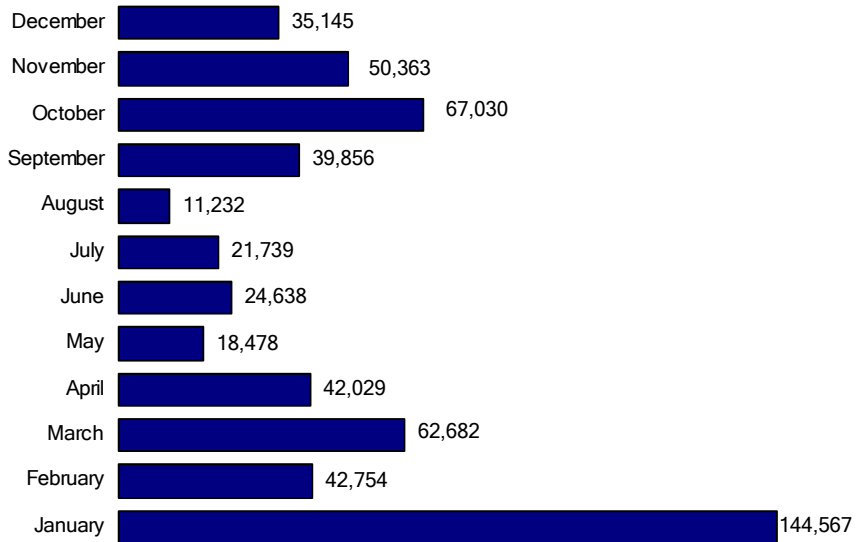
**FIGURE 2** TOTAL VISITORS BY MONTH



*VISITORS STAYING OVERNIGHT IN PAID ACCOMMODATION BY MONTH*

Figure 3 shows the number of visitors staying in paid accommodation by month for Bass Coast Shire. Paid accommodation in Bass Coast Shire includes Self-contained Cottages, Bed and Breakfasts (B&B's), Motels and Conference Centres. The peak visitor population staying in paid accommodation occurs in January with low overnight visitation in August and May.

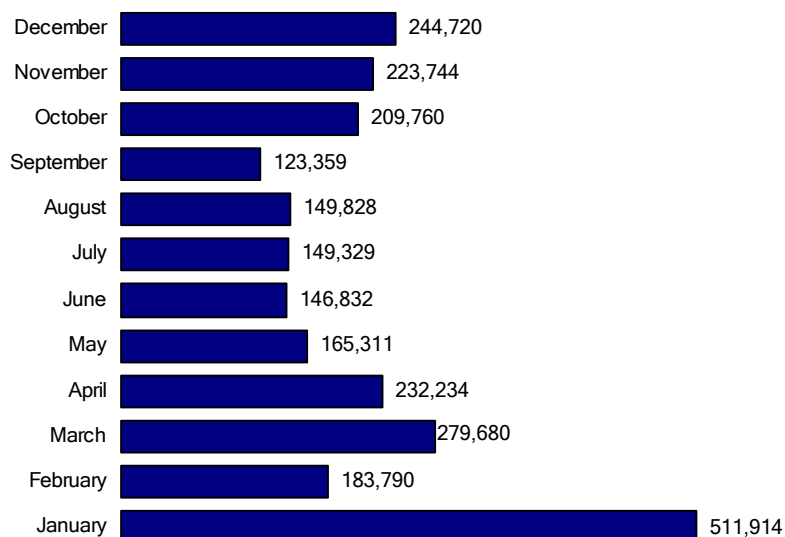
**FIGURE 3** PAID ACCOMMODATION VISITATION BY MONTH



*DAYTRIP VISITORS BY MONTH*

Figure 4 shows daytrip visitation to the Bass Coast Shire by month. Daytrip visitation peaks January with 511,914 daytrip visitors.

FIGURE 4 DAYTRIP VISITATION PER MONTH



### 3.3.3. PHILLIP ISLAND/SAN REMO

#### VISITATION OVERVIEW

Table 2 shows the estimated visitation to the Phillip Island/San Remo region. An estimated 3,190,188 people visit the Phillip Island/San Remo region each year, including 1,356,188 overnight and 1,834,000 daytrip visitors.

32% of overnight visitors stay in paid accommodation (such as motels and caravan parks). The remainder (68%) stayed in their second (holiday) home or with friends or relatives.

TABLE 2 ANNUAL VISITATION SUMMARY, PHILLIP ISLAND/SAN REMO, 2010 (PAVE)

ANNUAL VISITATION	Visitor Days	Total Visitors
Number of Visitors Staying in Commercial Accommodation	646,532	339,340
Number of Visitors Staying in Caravan Parks	480,645	96,129
<i>Number of Visitors Staying in Paid Accommodation</i>	<i>1,127,177</i>	<i>435,469</i>
Number of Visitors Staying in their Holiday Home	2,679,192	797,429
Number of Visitors Staying with Friends and Relatives	246,580	123,290
<b>Total Number of Overnight Visitors</b>	<b>4,052,949</b>	<b>1,356,188</b>
<b>Total Number of Daytrip Visitors</b>	<b>1,834,000</b>	<b>1,834,000</b>
<b>Total Number of Visitors</b>	<b>5,886,949</b>	<b>3,190,188</b>

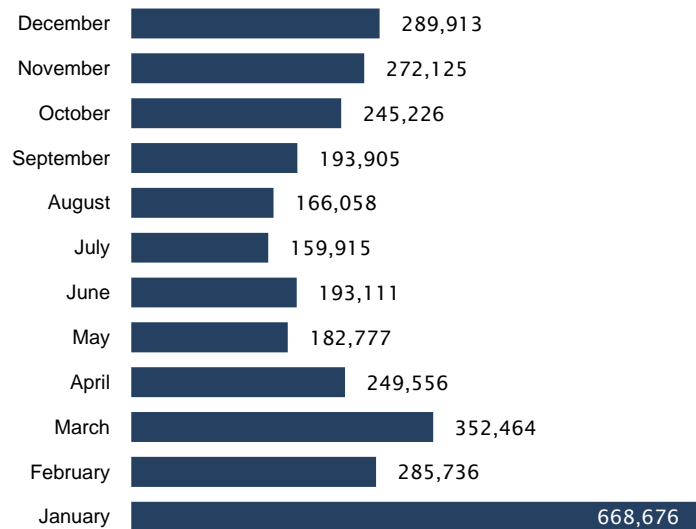
Source: PAVE, Urban Enterprise, 2010.

## VISITATION BY MONTH

### *TOTAL VISITATION BY MONTH*

Figure 5 shows the total visitation by month for Phillip Island/San Remo. The peak visitor population occurs in January. This highlights that Phillip Island/San Remo is a traditional destination with peaks aligned to the summer months.

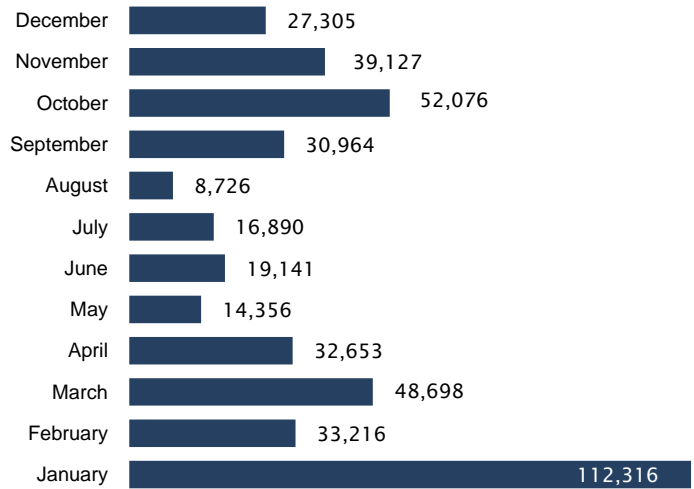
**FIGURE 5** TOTAL VISITORS BY MONTH



### *VISITORS STAYING OVERNIGHT IN PAID ACCOMMODATION BY MONTH*

Figure 6 shows the number of visitors staying in paid accommodation by month for Phillip Island/San Remo. Paid accommodation in Phillip Island/San Remo includes Self-contained Cottages, Bed and Breakfasts (B&B's), Motels and Caravan Parks. The peak visitor population staying in paid accommodation occurs in January with low overnight visitation between May and August.

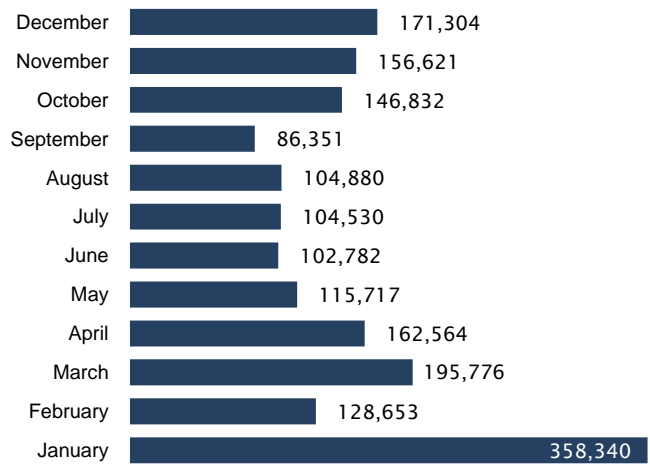
**FIGURE 6 PAID ACCOMMODATION VISITATION BY MONTH**



*DAYTRIP VISITORS BY MONTH*

Figure 7 shows daytrip visitation to Phillip Island/San Remo by month. Daytrip visitation peaks January with 358,340 daytrip visitors.

**FIGURE 7 DAYTRIP VISITATION PER MONTH**



**3.3.4. INVERLOCH**

**VISITATION OVERVIEW**

Table 3 shows the estimated visitation to Inverloch. An estimated 738,305 people visit Inverloch each year, including 319,105 overnight and 419,200 daytrip visitors.

18% of overnight visitors stay in paid accommodation (such as motels and caravan parks). The remainder (82%) stayed in their second (holiday) home or with friends or relatives.

TABLE 3 ANNUAL VISITATION SUMMARY, INVERLOCH, 2010 (PAVE)

ANNUAL VISITATION	Visitor Days	Total Visitors
Number of Visitors Staying in Commercial Accommodation	70,590	37,050
Number of Visitors Staying in Caravan Parks	107,415	21,483
<i>Number of Visitors Staying in Paid Accommodation</i>	<i>178,005</i>	<i>58,533</i>
Number of Visitors Staying in their Holiday Home	778,002	231,563
Number of Visitors Staying with Friends and Relatives	58,019	29,010
<b>Total Number of Overnight Visitors</b>	<b>1,014,026</b>	<b>319,105</b>
<b>Total Number of Daytrip Visitors</b>	<b>419,200</b>	<b>419,200</b>
<b>Total Number of Visitors</b>	<b>1,433,226</b>	<b>738,305</b>

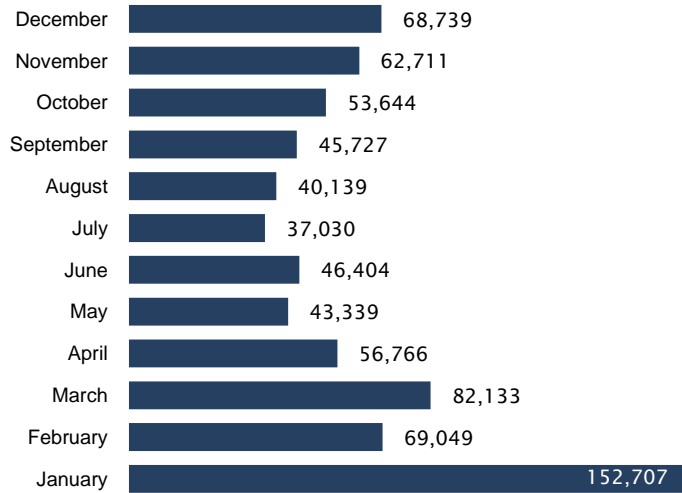
Source: PAVE, Urban Enterprise, 2010.

VISITATION BY MONTH

*TOTAL VISITATION BY MONTH*

Figure 8 shows the total visitation by month for Inverloch. Peak visitation occurs in January.

FIGURE 8 TOTAL VISITORS BY MONTH

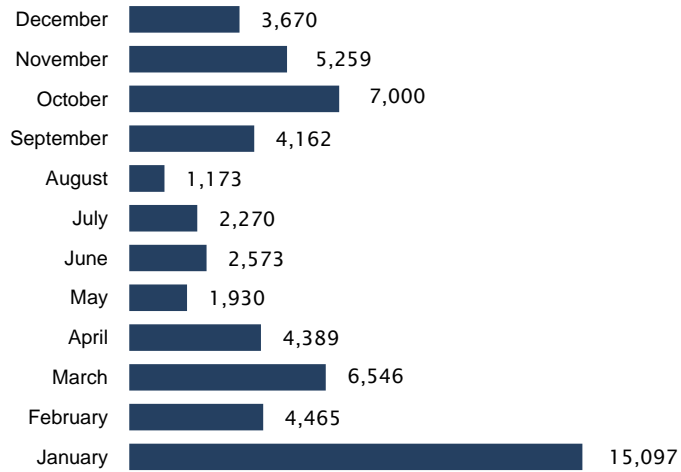


*VISITORS STAYING OVERNIGHT IN PAID ACCOMMODATION BY MONTH*

Figure 9 shows the number of visitors staying in paid accommodation by month for Inverloch. Paid accommodation in Inverloch includes Self-contained Cottages, Bed and Breakfasts (B&B's), Motels and Caravan Parks. The peak visitor population staying in paid accommodation occurs in January with very low overnight visitation in the winter months.



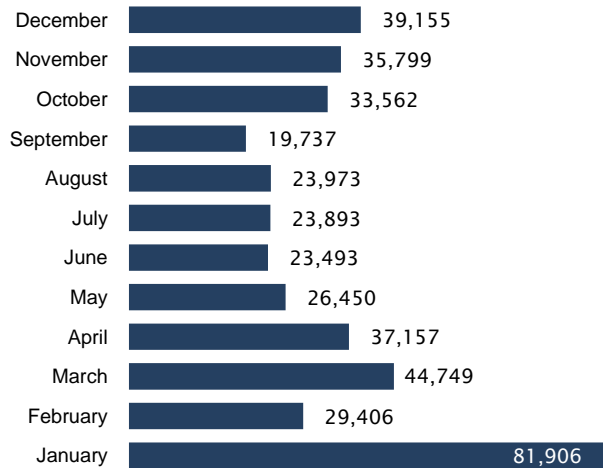
**FIGURE 9 PAID ACCOMMODATION VISITATION BY MONTH**



*DAYTRIP VISITORS BY MONTH*

Figure 10 shows daytrip visitation to Inverloch by month. Daytrip visitation peaks January with 81,906 daytrip visitors.

**FIGURE 10 DAYTRIP VISITATION PER MONTH**



## 4. DAYTRIP VISITORS

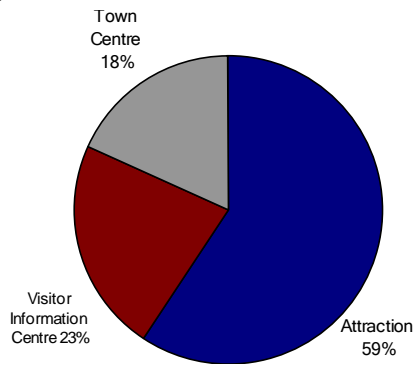
### 4.1. INTRODUCTION

The following section provides an overview of daytrip visitors to Bass Coast Shire. The profile includes information relating to demographics, information sources, motivations, activities undertaken and expenditure. The data is sourced through an intercept survey of visitors to Bass Coast Shire and has a sample of 120 respondents.

### 4.2. SAMPLE

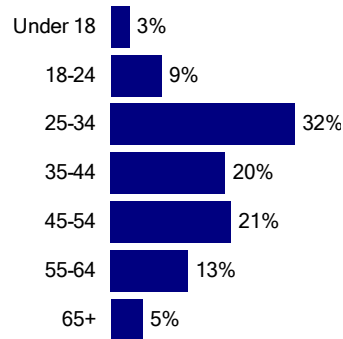
#### INTERCEPT SURVEY LOCATION

The majority of daytrip intercept surveys were collected from Attractions (59%) followed by Visitor Information Centres (23%). Responses from Town Centres only garnered 18% of responses.



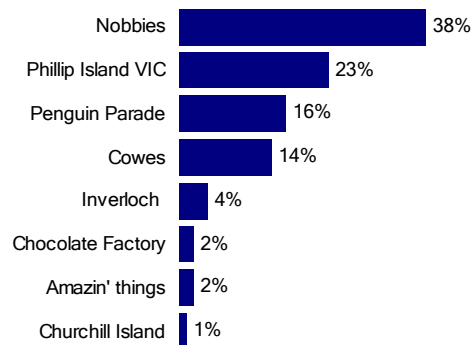
#### AGE OF RESPONDENTS

The majority of daytrip intercept survey respondents were aged between 25 and 34 years (32%) followed by those aged between 45 and 54 years (21%).



#### INTERCEPT SURVEY LOCATION

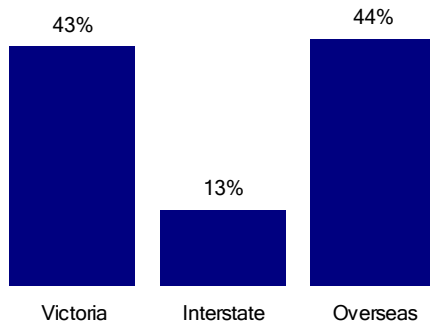
The majority of daytrip visitor intercept surveys were undertaken at the Nobbies Centre (38%) followed by the Phillip Island Visitor Information Centre (23%).



### 4.3. ORIGIN OF VISITORS

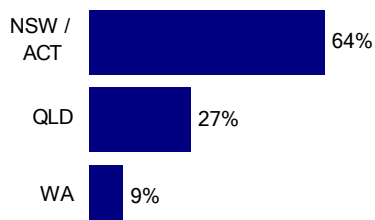
#### VISITOR ORIGIN OVERVIEW

Overseas visitors comprised the greatest proportion of daytrip visitors to the Bass Coast Shire (44%) closely followed by Victorian visitors (43%). Interstate visitors comprised the lowest proportion of daytrip visitors (13%). Interstate and overseas visitors were generally visiting from Melbourne.



#### INTERSTATE VISITORS

The majority of interstate visitors (64%) originated from NSW / ACT, followed by visitors from Queensland (27%) and Western Australia (9%). No daytrip visitors were surveyed from South Australia, Tasmania or the Northern Territory.



#### OVERSEAS VISITORS

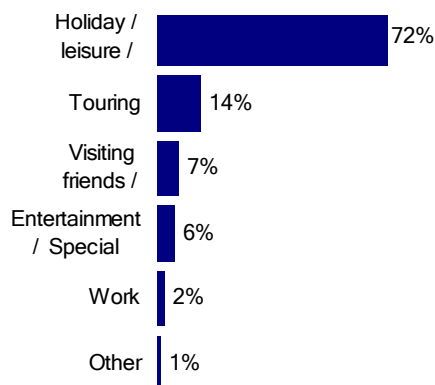
The greatest proportion of overseas daytrip visitors originated from the USA (24%), followed by visitors from the UK (20%). The low proportion of visitors from China and other Asian countries may be explained by low participation in the intercept survey due to language barriers.

Country	Percentage
USA	24%
UK	20%
Canada	5%
France	5%
Holland	5%
India	5%
Japan	5%
Singapore	5%
Thailand	5%
Cambodia	2%
Chile	2%
China	2%
Denmark	2%
Germany	2%
Hong Kong	2%
Ireland	2%
Mexico	2%
Taiwan	2%

#### 4.4. PURPOSE / MOTIVATION FOR VISIT

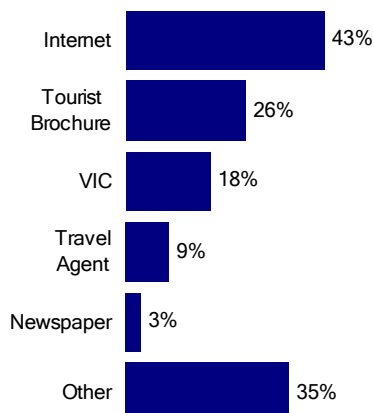
##### PURPOSE OF VISIT

The majority of daytrip visitors stated that their main purpose of visit was for “Holiday / leisure / getting away” (72%). Visitors who were touring accounted for 14% of daytrip Visitors while 7% listed their main purpose of visit as “visiting friends / relatives”.



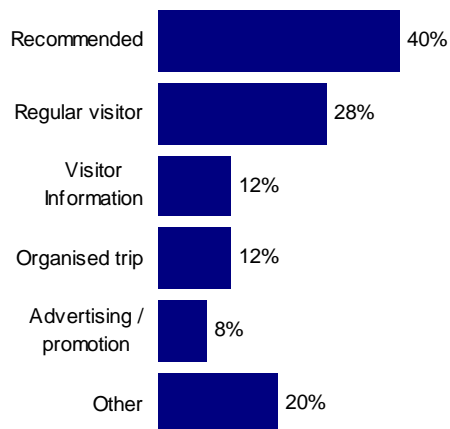
##### MOTIVATION

43% of daytrip visitors stated that they were motivated to visit the Bass Coast Shire by the “Internet” followed by “Tourist Brochures” (26%). Only 3% of respondents stated that they were motivated to visit by “newspapers/advertising”.



##### REASON FOR VISITING BASS COAST SHIRE

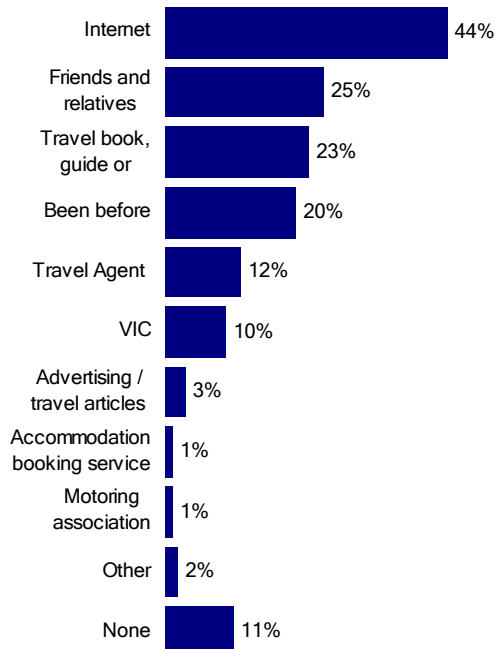
40% of daytrip visitors stated their reason for visiting Bass Coast Shire was a recommendation by family / friends / travel agent, followed by those who are regular visitors 28%.



#### 4.5. INFORMATION SOURCES

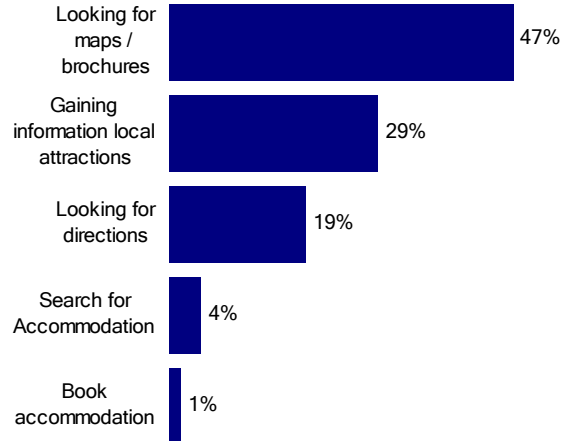
##### SOURCES UTILISED

29% of respondents stated that they used the Internet as their main source information source, this is followed by information from friends and relatives (16%). 11% of respondents did not use any information for their visit.



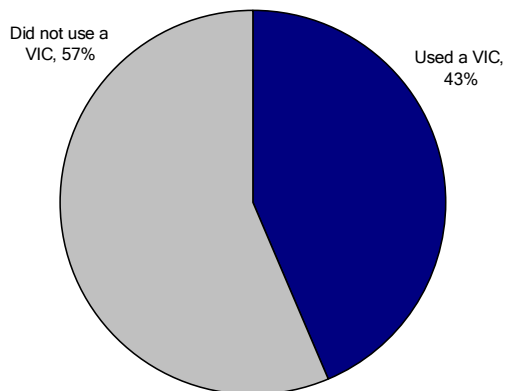
##### WHAT WAS THE VIC USED FOR

Of the visitors who used a Visitor Information Centre 47% did so to look for maps and brochures while 29% stated that they were obtaining information on local attractions.



##### WAS A VISITOR INFORMATION CENTRE USED?

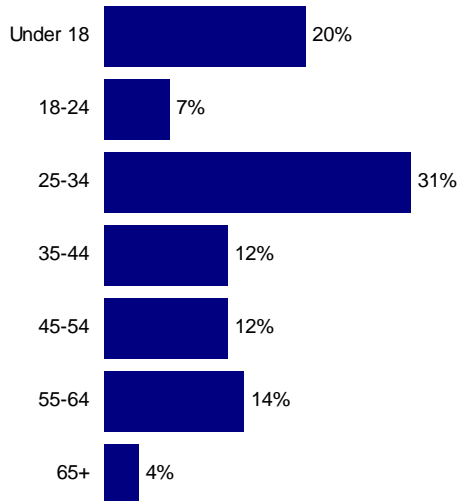
57% of daytrip visitors stated that they did not use a Visitor Information Centre whilst in Bass Coast Shire.



#### 4.6. TRAVEL PARTY

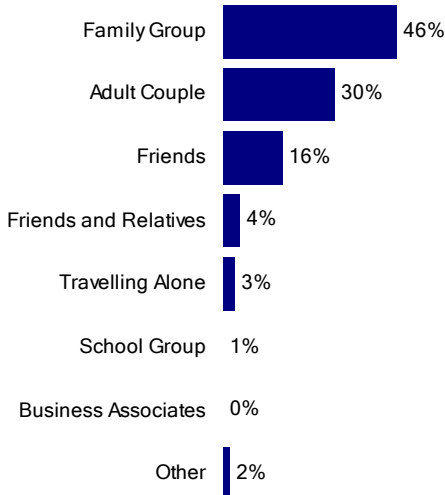
##### AGE OF ALL PEOPLE IN TRAVEL PARTY

The greatest proportion of daytrip visitors were aged between 25 and 34 (31%) this was followed by those aged under 18 (20%). This indicates that there is a large proportion of young families visiting the Bass Coast Shire for daytrips.



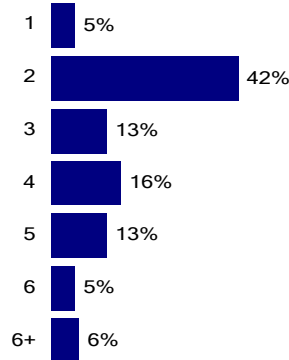
##### TRAVEL PARTY TYPE

The most common travel party type of daytrip visitors to Bass Coast Shire was a “family group” (46%) followed by “adult couples” (30%).



#### NUMBER IN TRAVEL GROUP

The average number of people per travel group was 3.8 persons. The greatest proportion of travel groups contained two people (42%) followed by groups of four (16%).



#### 4.7. EXPENDITURE

##### AVERAGE EXPENDITURE PER VISITOR

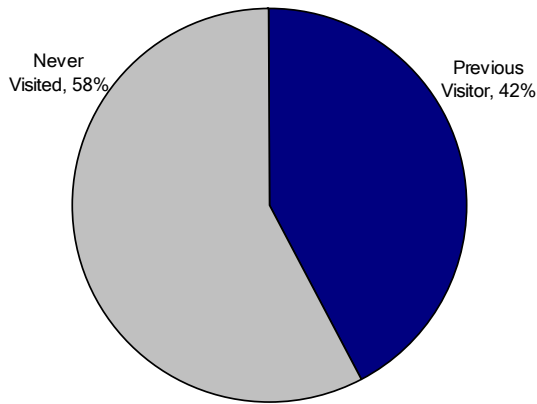
The average expenditure per day trip visitor to Bass Coast Shire was \$66. Almost half of this can be attributed to entertainment while travel costs equated to an average of \$16 per visitor.

	Average Expenditure per person
Entertainment	\$31.12
Travel	\$16.04
Dining out	\$10.48
Take away food and drink	\$3.85
Shopping	\$2.56
Food and Drink purchased at attractions	\$0.77
Groceries	\$0.73
Other	\$0.30
<b>Total</b>	<b>\$65.85</b>

## 4.8. PREVIOUS / FUTURE VISITATION

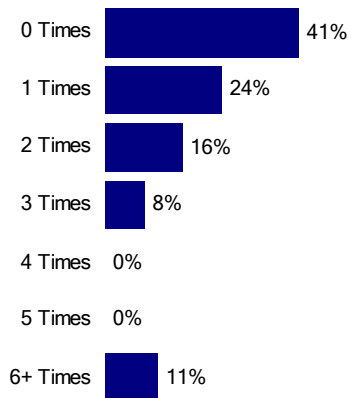
### PREVIOUS VISITATION

42% of daytrip visitors had visited the Shire previously.



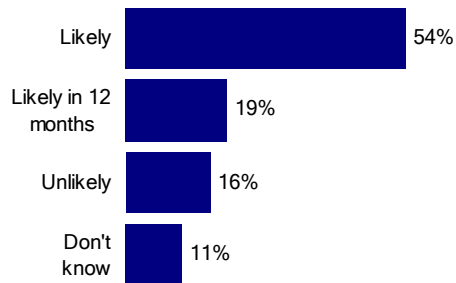
### NUMBER OF TIMES VISITED IN THE PAST 12 MONTHS

41% of respondents who had visited the Bass Coast Shire before had not visited in the previous 12 months. 24% had visited once while 16% have visited twice.



### LIKELIHOOD OF RETURN

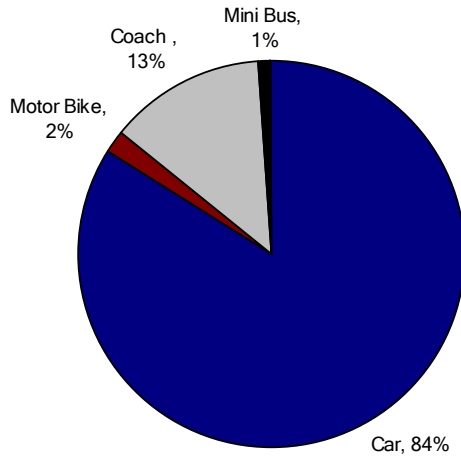
54% of daytrip visitors stated that they were likely to return to the Bass Coast Shire, but not within the next year, while 19% of respondents were likely to return within 12 months. 16% of respondents stated that they were unlikely to return to the Shire, the majority of which were overseas visitors who were unlikely to visit Australia again in the foreseeable future.



#### 4.9. TRANSPORTATION / NAVIGATION

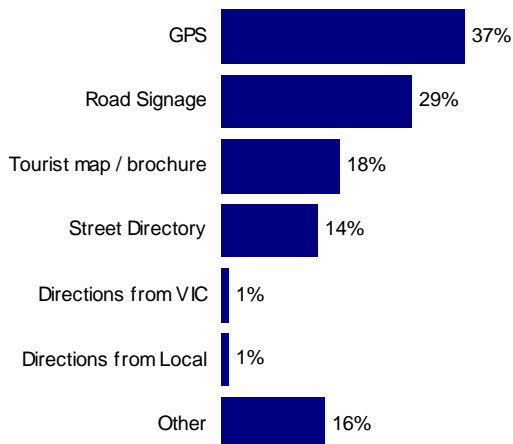
##### TYPE OF TRANSPORT

The majority of daytrip visitors accessed the Shire by car (84%). 13% of daytrip visitors arrived by coach, many of whom were taking part in an organised tour.



##### NAVIGATION

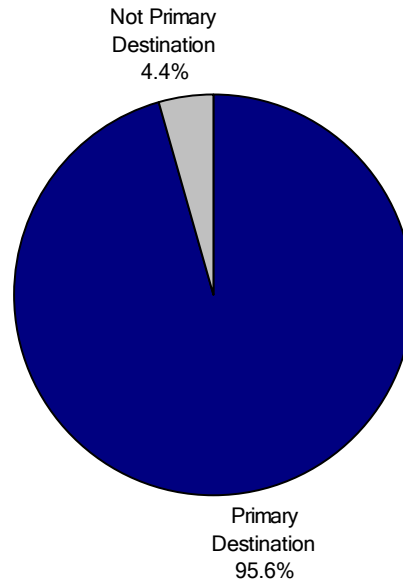
More than a third of visitors used a GPS system to navigate their way to Bass Coast Shire (37%) reflecting the growing importance of this form of navigation. This was followed by visitors who used road signage (29%) and tourist maps (14%).



#### 4.10. CHARACTERISTICS

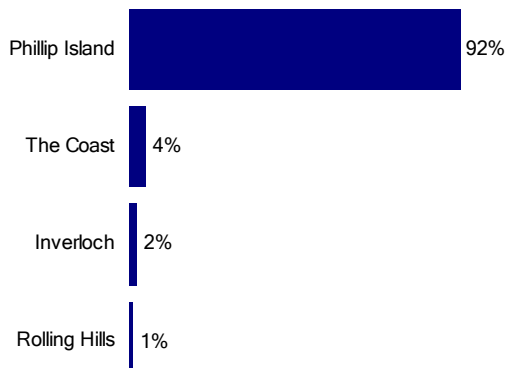
##### PHILLIP ISLAND PRIMARY DESTINATION

96% of daytrip visitors stated that Phillip Island was their primary destination in Bass Coast Shire. This is most likely due to the large number of tourist attractions on the Island.



##### ASSOCIATE WITH BASS COAST SHIRE

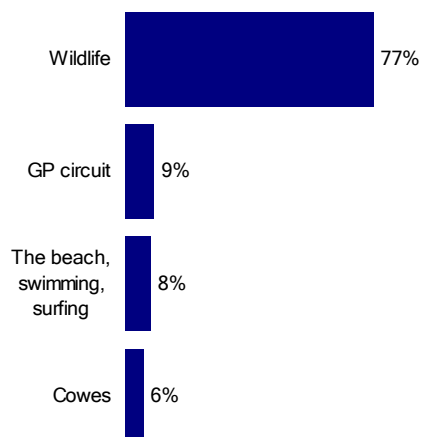
The overwhelming majority of daytrip visitors stated that they associate Bass Coast Shire with Phillip Island (92%).





#### ASSOCIATE WITH PHILLIP ISLAND

The vast majority of daytrip visitors associate Phillip Island with wildlife (77%). 9% associate Phillip Island with the GP circuit and 8% with the “beach, swimming and surfing with Phillip Island”.



#### 4.11. ACTIVITIES

The most popular activity undertaken by daytrip visitors was “sightseeing” which was undertaken by 75% of respondents. This was followed by “wildlife” (67%) and “eating out” at restaurants (43%).

Activity	%
Sightseeing	75%
Wildlife	67%
Eat out	43%
Beach	34%
Touring	18%
Man made attractions	13%
Shopping	9%
Outdoor activities	9%
Visit farms	8%
Picnics	6%
Historic sites	6%
Tours / wineries	6%
Bushwalking	5%
Visit friends and relatives	5%
Fishing	4%
Organised sports events	4%
Surfing	3%
Boating	1%

# 5. OVERNIGHT VISITORS

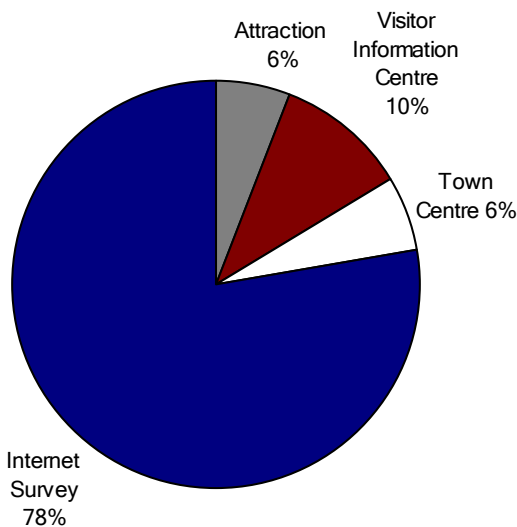
## 5.1. INTRODUCTION

This section provides an overview of overnight visitors to the Bass Coast Shire. The data is sourced from primary research undertaken through intercept surveys and internet surveys completed by visitors to Bass Coast Shire. The sample consists of 445 overnight visitors.

## 5.2. SAMPLE

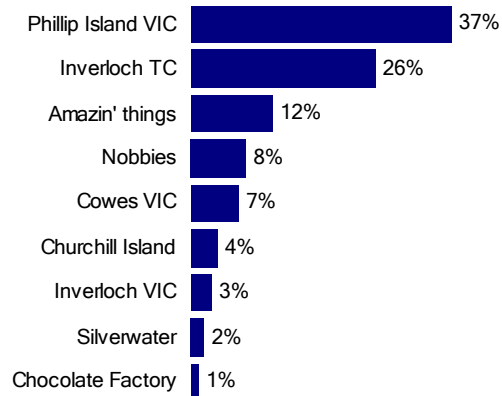
### TYPE OF LOCATION

The majority of surveys were collected from the internet (78%). The greatest number of intercept surveys were from Visitor Information Centres (10%).



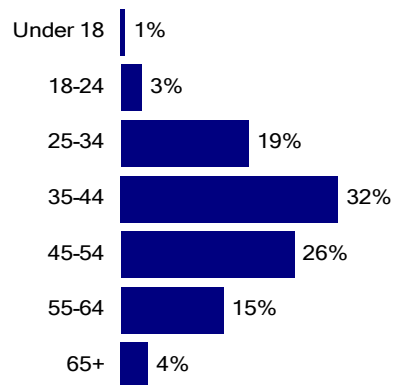
### INTERCEPT SURVEY LOCATION

The majority of overnight intercept surveys undertaken in Bass Coast Shire were undertaken at the Phillip Island VIC (37%).



### AGE OF RESPONDENT

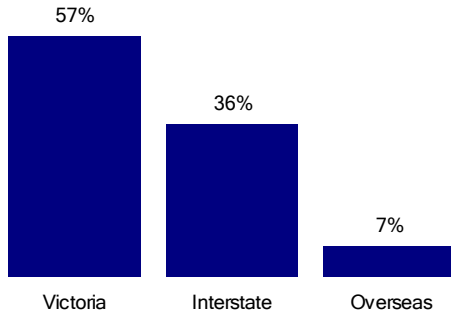
The majority of survey respondents were aged between 35 and 44 years of age (32%) followed by those aged between 45 and 54 years of age (26%).



### 5.3. ORIGIN

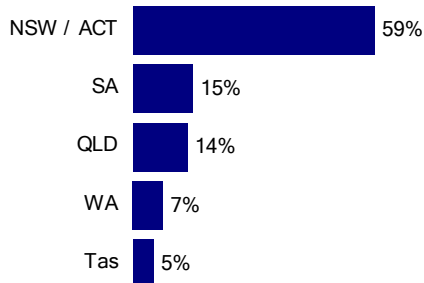
#### VISITOR ORIGIN

The majority of overnight visitors were from Victoria (57%) followed by visitors from Interstate (36%). Only 7% of overnight visitors surveyed were from overseas.



#### INTERSTATE VISITORS

The vast majority of interstate visitors were from NSW / ACT (59%). 15% of visitors were from South Australia while 14% were from Queensland.



#### INTERNATIONAL VISITORS

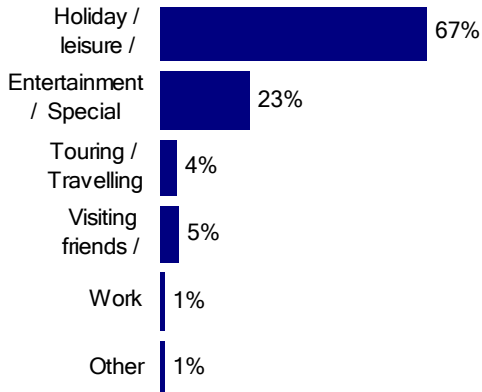
Visitors from the UK comprised the largest proportion of overnight visitors to Bass Coast Shire (23%). 18% of overnight visitors were from New Zealand. The number of visitors from some Asian countries may be under represented due to language barriers.

Country	% of Internationals
UK	23%
New Zealand	18%
Singapore	15%
USA	13%
Malaysia	10%
Canada	5%
Ireland	5%
Japan	3%
Netherlands	3%
Hong Kong	3%
Germany	3%

## 5.4. PURPOSE / MOTIVATION FOR VISIT

### PURPOSE OF VISIT

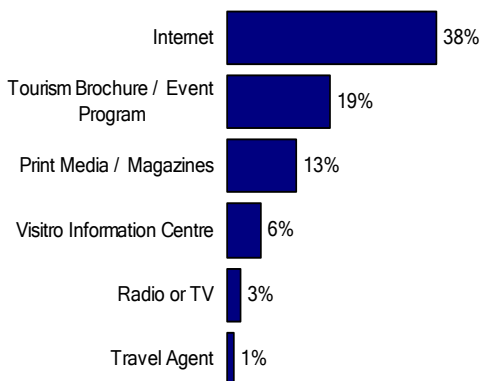
The most common purpose of visit for overnight visitors to the Bass Coast Shire was for “holiday / leisure / getting away” (67%). A further 23% visited for entertainment or a special event which includes events at the Motorbike Grand Prix Circuit.



### ADVERTISING / PROMOTIONAL MOTIVATION

The majority of visitors who were motivated to visit by advertising or promotional material listed “the internet” as the key motivational tool (38%) followed by a tourism brochure / event program (19%). Only 1% of respondents stated that they were motivated to Visit Bass Coast Shire by a travel agent.

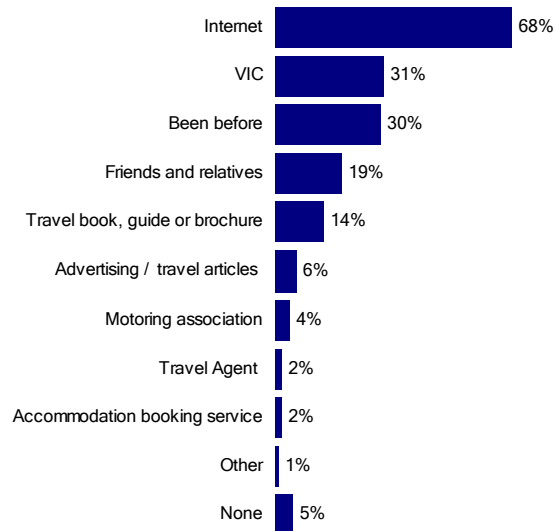
Note: The number of respondents who were motivated by the internet may be over represented as many results were gathered using an internet survey which may indicate an aptitude or preference for internet use.



## 5.5. INFORMATION SOURCES

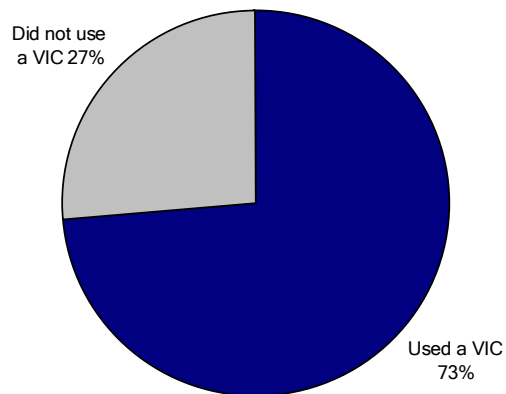
### INFORMATION SOURCES UTILISED

The majority of overnight visitors stated that they utilised the Internet to obtain information (68%). 31% of respondents used a Visitor Information Centre to gather information



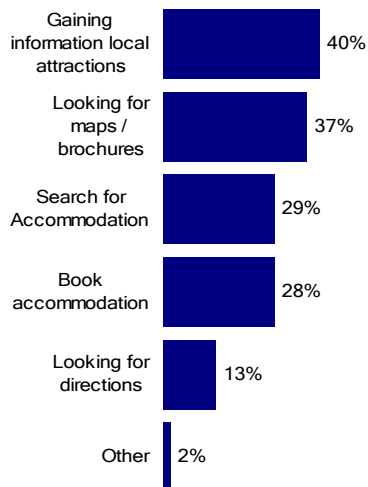
### WAS A VISITOR INFORMATION CENTRE USED?

73% of overnight visitors to the Bass Coast Shire stated that they used a Visitor Information Centre.



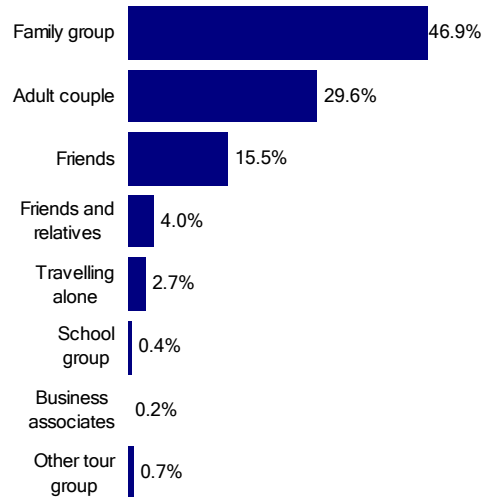
### WHAT WAS THE VISITOR INFORMATION CENTRE USED FOR?

40% of respondents who used a Visitor Information Centre stated that they used it to obtain information on local attractions followed by those “looking for maps / brochures” (37%). Only 13% of respondents used a Visitor Information Centre to look for directions.



### TYPE OF TRAVEL PARTY

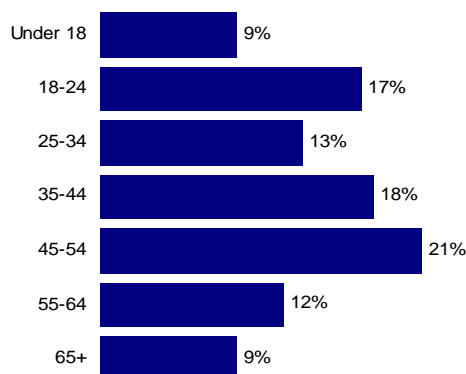
The majority of travel parties visiting overnight to Bass Coast Shire were “family groups” (47%) followed by “adult couples” (30%).



## 5.6. TRAVEL PARTY

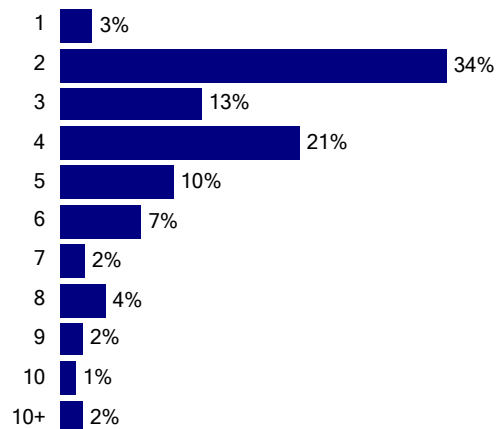
### AGE OF TRAVEL PARTY MEMBERS

The age of overnight visitors to Bass Coast Shire was evenly distributed across all age groups. The greatest proportion of overnight visitors were aged between 45 and 54 years (21%) followed by those aged 35-44 years (18%). The overnight visitor profile is older than the daytrip visitor profile.



### NUMBER IN TRAVEL PARTY

The majority of travel parties visiting Bass Coast Shire overnight travelled in groups of two (34%). The average size of a travel group of overnight visitors was 3.7 persons.

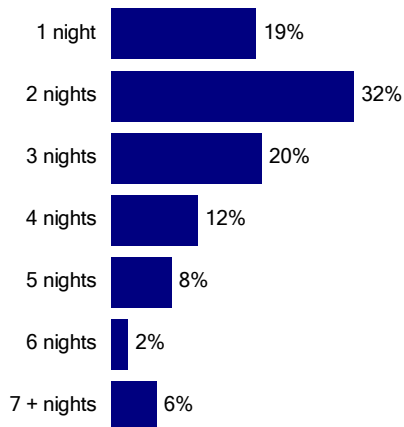


## 5.7. ACCOMMODATION

### LENGTH OF STAY

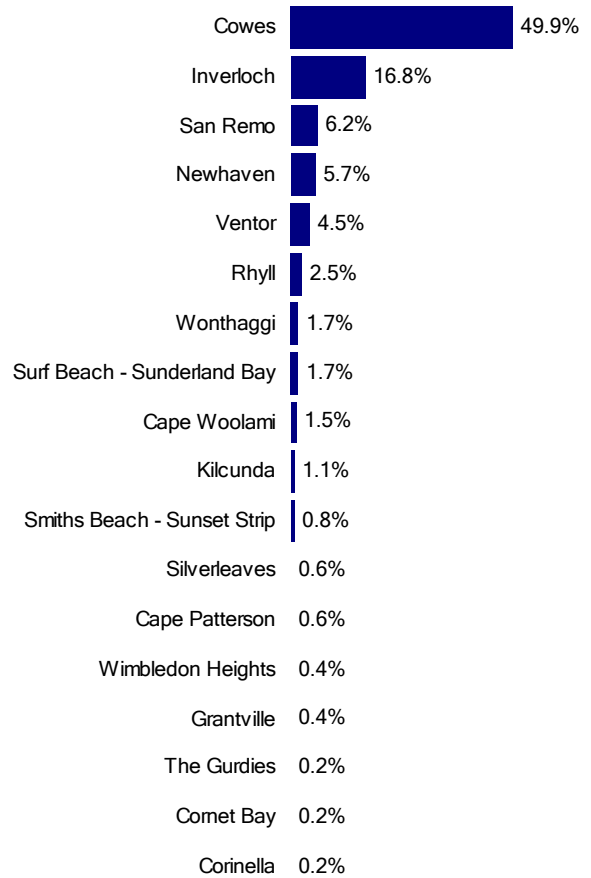
Around a third of overnight visitors to the Bass Coast Shire stayed for two nights (32%). 20% stayed for three nights and 19% stayed for a single night. 6% of respondents stayed for seven nights or more.

The average length of stay for overnight visitors to Bass Coast Shire was 3.1 nights.



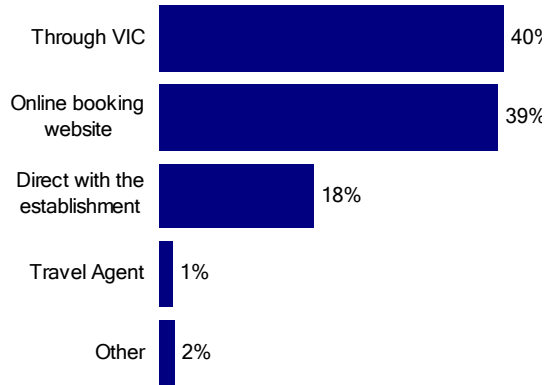
### LOCATION STAYED

The majority of overnight visitors to Bass Coast Shire stayed in Cowes (50%). This was followed by Inverloch (17%) and San Remo (6%).



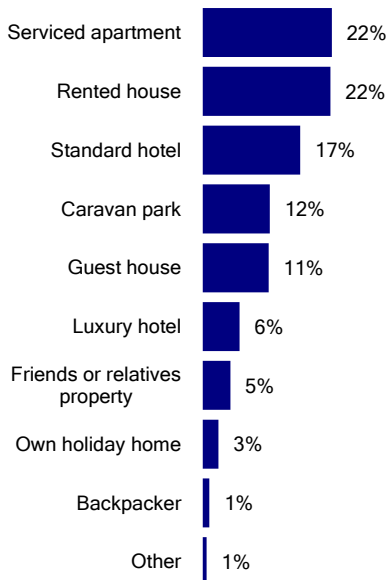
### ACCOMMODATION BOOKED

Most respondents booked their accommodation through a VIC (40%) while 39% used an online booking website. Only 1% of respondents booked accommodation through a travel agent.



### TYPE OF ACCOMMODATION

A large proportion of overnight visitors stayed in a serviced apartment (22%) or a rented house (22%). Only 1% of visitors used backpacker accommodation, which reflect a low supply of this accommodation type.



## 5.8. EXPENDITURE

### AVERAGE EXPENDITURE PER PERSON

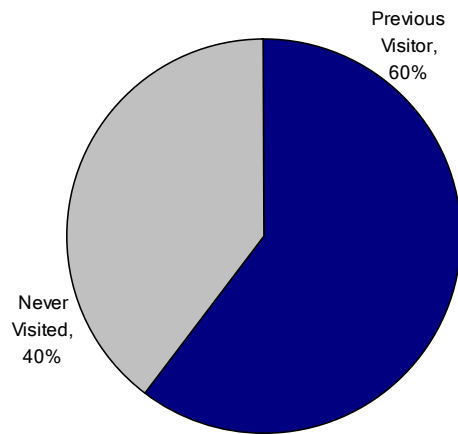
Overnight visitors spent an average of \$389 on their trip. Visitors spent an average of \$149 on accommodation and \$45 on Travel / Transport.

Type of Expenditure	Average Amount
Accommodation	\$148.55
Travel / Transport	\$45.53
Food and Drink - dining out	\$39.63
Entertainment / attractions	\$37.24
Shopping	\$34.50
Groceries	\$26.90
Food and Drink - take away	\$23.24
Package tours	\$16.71
Food and Drink purchased at attractions	\$11.63
Other	\$4.76
<b>Total</b>	<b>\$388.69</b>

## 5.9. PREVIOUS / FUTURE VISITATION

### VISITED BASS COAST SHIRE PREVIOUSLY

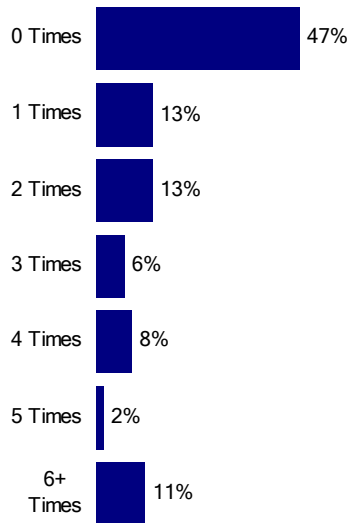
60% of overnight visitors to Bass Coast Shire had visited previously.



### NUMBER OF VISITS IN PAST 12 MONTHS

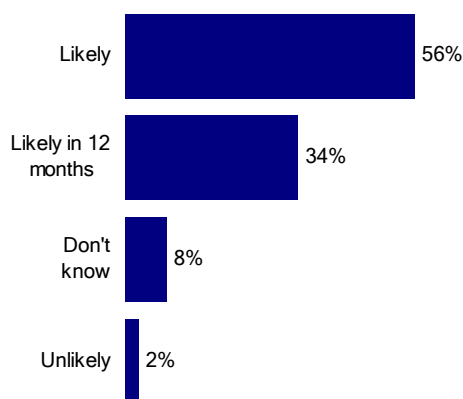
Of respondents that had visited previously, 47% had not visited in the past 12 months while 13% had visited once and 13% had visited twice.

11% of respondents had visited six times or more in the past 12 months.



### LIKELIHOOD OF RETURN

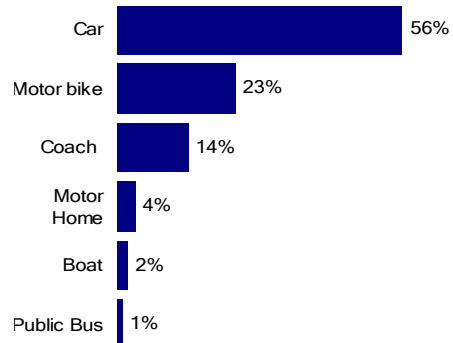
90% of respondents stated that they were likely to visit Bass Coast Shire again. 34% intended to visit the Shire again within 12 months. Only 2% of respondents stated that they were unlikely to visit again, the majority of which were international visitors who were unsure that they would return to Australia.



### 5.10. TRANSPORTATION / NAVIGATION

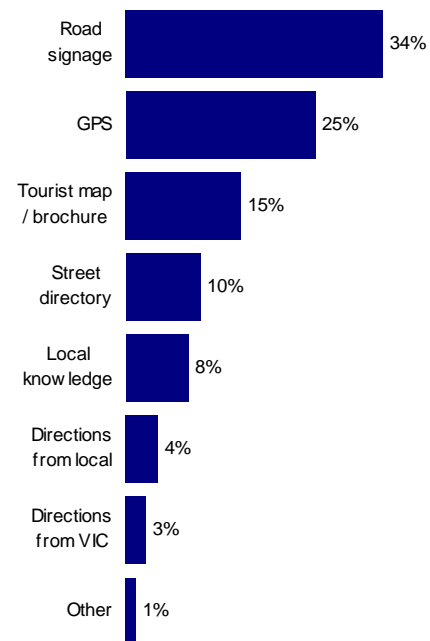
#### TRANSPORT USED

The majority of respondents accessed Bass Coast Shire by car (56%), while 23% accessed the Shire by motorbike. The number who visited by motor bike was influenced by those visiting the Phillip Island Grand Prix Circuit.



#### NAVIGATION

34% of overnight visitors to Bass Coast Shire use road signage to navigate their trip. 25% of visitors used a GPS, while 15% used a tourist map / brochure.

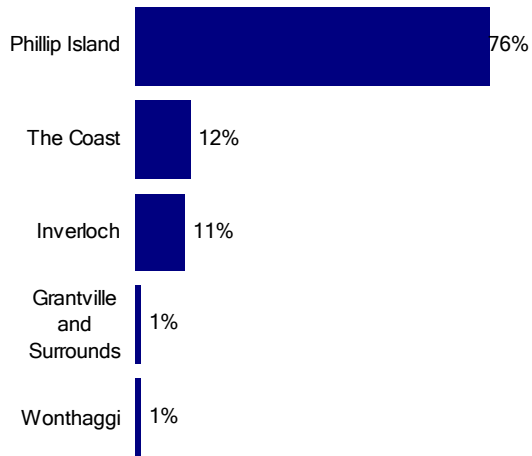




### 5.11. CHARACTERISTICS

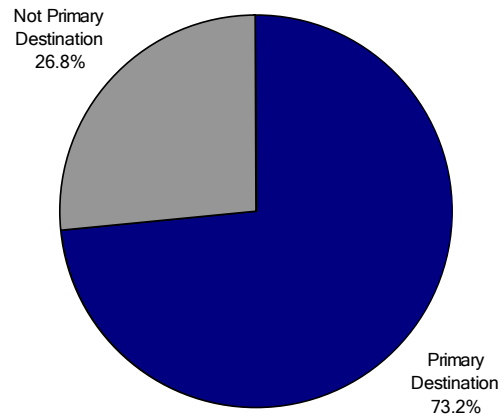
#### ASSOCIATE WITH BASS COAST SHIRE

The overwhelming majority of overnight visitors associate Bass Coast Shire with Phillip Island (76%). This is followed by The Coast (12%) and Inverloch (11%).



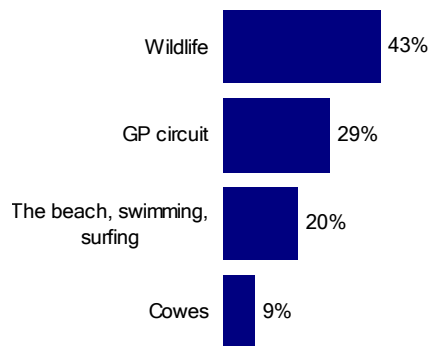
#### PHILLIP ISLAND PRIMARY DESTINATION

73% of overnight visitors stated that Phillip Island was their primary destination. This is significantly lower than for daytrip visitors.



#### ASSOCIATE WITH PHILLIP ISLAND

43% of overnight visitors associate “wildlife” with Phillip Island while 29% associate Phillip Island with the GP Circuit.



## 5.12. ACTIVITIES

The most popular activity undertaken by overnight visitors to the Bass Coast Shire was “sightseeing” (69%). This is followed by “going to the beach” (55%) and “eating out” at restaurants (51%).

“Other sports” and “going to the beach” had significantly higher participation from overnight visitors than daytrip visitors.

Activity	%
Sightseeing	69%
Beach	55%
Eat out	51%
Other sports	44%
Shopping	28%
Man made attractions	21%
Touring	20%
Historic sites	15%
Local produce	14%
Organised sports events	13%
Wildlife	13%
Picnics	12%
Boating / fishing	10%
Visit friends and relatives	10%
Bushwalking	10%
Festivals	10%
Outdoor Activities	9%
Tours / wineries	9%
Surfing	4%
Cycling	3%
Visit farms	2%
Other	2%

## 6. MAINLAND AND PHILLIP ISLAND VISITORS

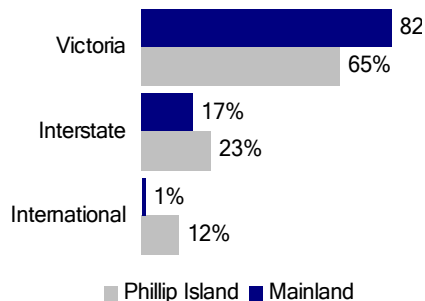
### 6.1. INTRODUCTION

The following section outlines the differences in responses from visitors to the Mainland compared with visitors to Phillip Island. This sample includes both overnight and daytrip visitors.

### 6.2. ORIGIN

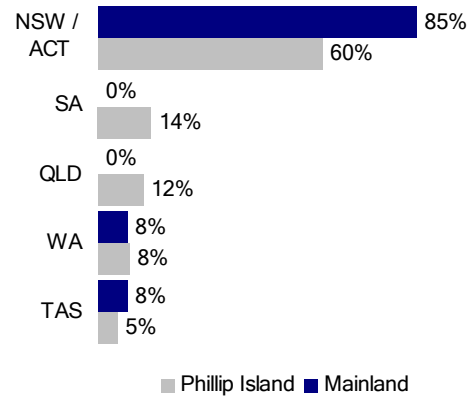
#### VISITOR ORIGIN

Phillip Island received a greater proportion of International and Interstate visitors (32%) than the Mainland (18%). Phillip Island had a considerably larger proportion of International visitors than the Mainland (12% compared to 1%). This may be due to the attractions at Phillip Island, such as the Penguin Parade, having a greater level of recognition amongst international visitors.



#### DOMESTIC VISITOR ORIGIN

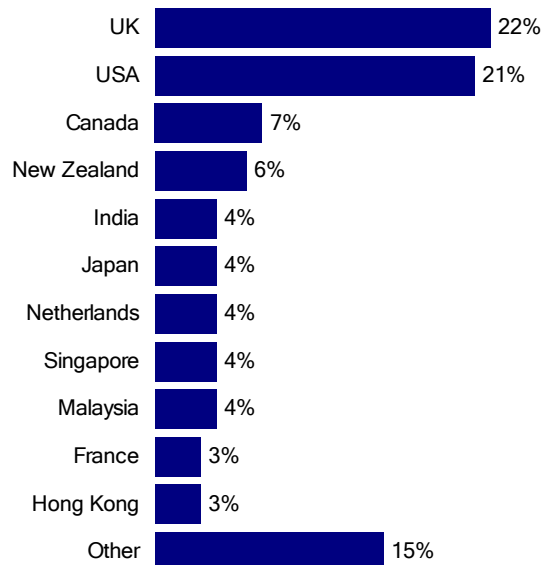
The overwhelming majority of domestic visitors to both Phillip Island and the Mainland are from NSW / ACT. Phillip Island attracts visitors from a greater variety of States when compared to the Mainland, which only attracted visitors from Western Australia, Tasmania and NSW / ACT. Neither the Mainland nor Phillip Island had any recorded survey respondents from the Northern Territory.



#### INTERNATIONAL VISITOR ORIGIN

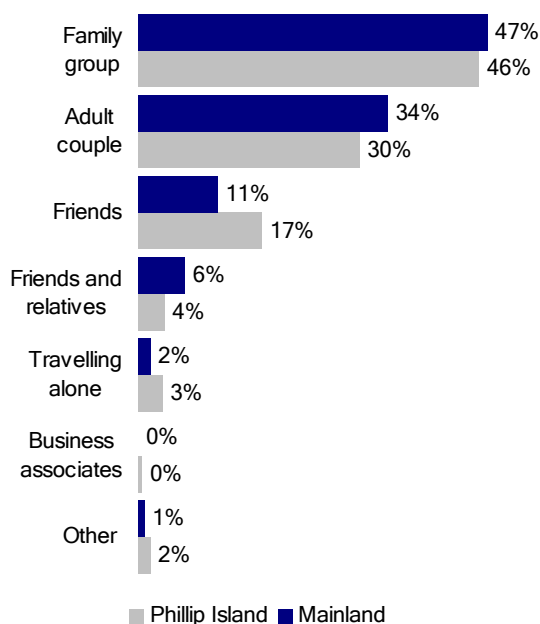
Phillip Island had considerably more international visitors than the Mainland. Only one international visitor was recorded as visiting the mainland through the intercept survey.

#### PHILLIP ISLAND



## TRAVEL PARTY

Travel groups to both the Mainland and Phillip Island are relatively similar. Phillip Island had a greater proportion of visitors who were travelling with friends (17%) compared to the Mainland (11%) and those travelling alone (3% compared to 2%). Conversely, when compared to visitors to Phillip Island, the Mainland had a greater proportion of visitors travelling with friends and relatives (6% compared to 4%) and as part of an adult couple (34% compared to 30%).



## 6.3. EXPENDITURE

### AVERAGE EXPENDITURE PER PERSON

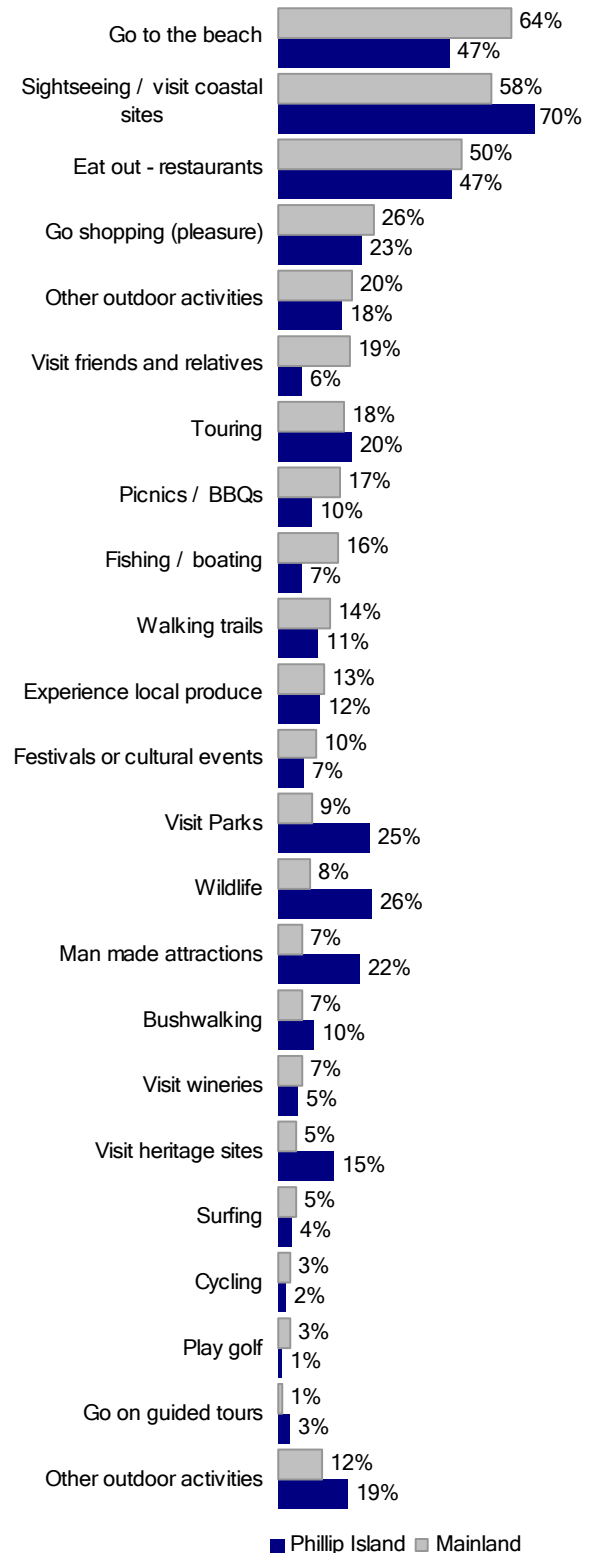
Visitors to Phillip Island had a slightly higher average expenditure than visitors to the Mainland (\$343 compared to \$333). Visitors to Phillip Island spent a larger amount on accommodation, attractions, travel and dining out. However, visitors to the Mainland spent a greater average amount on groceries and take-way food.

	Phillip Island	Mainland
Accommodation	\$127.91	\$119.57
Entertainment / attractions	\$38.85	\$27.34
Food and Drink - dining out	\$36.20	\$32.90
Food and Drink - take away	\$19.41	\$23.09
Food and Drink purchased at attractions	\$10.00	\$9.99
Groceries	\$21.96	\$26.11
Package tours	\$12.34	\$18.61
Shopping	\$30.16	\$27.21
Travel / Transport	\$41.73	\$38.01
Other	\$4.51	\$9.81
<b>Total</b>	<b>\$343.07</b>	<b>\$332.64</b>

#### 6.4. ACTIVITIES

The most popular activities for visitors to Phillip Island was “general sightseeing” and “visiting coastal sites” (70%) while the most popular activity on the mainland was to “go to the beach” (64%).

Visitors to Phillip Island had a significantly greater proportion of visitors who visited wildlife (26% compared to 8%), man made attractions (22% compared to 7%) and parks (25% compared to 9%). Conversely, a significantly greater proportion of visitors to the Mainland visited family and friends than visitors to Phillip Island (19% compared to 6%).



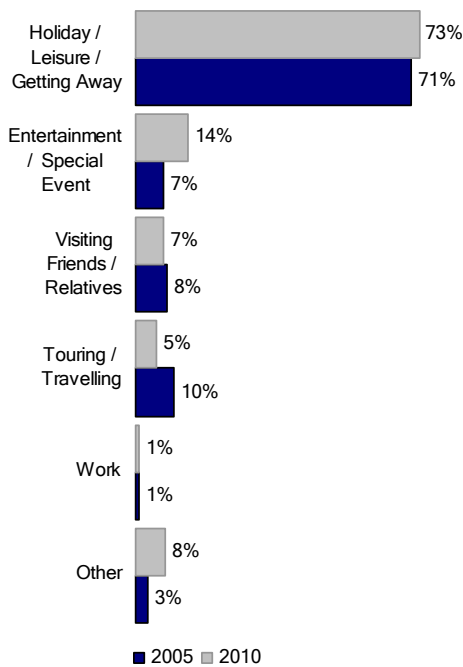
# 7. TRENDS IN VISITATION

## 7.1. INTRODUCTION

The following section provides an overview of visitor trends between 2005 and 2010. The data from 2005 is sourced from the Economic Impact of Tourism in Bass Coast Shire study that Urban Enterprise conducted on behalf of the Shire in 2005.

## 7.2. PURPOSE OF VISIT

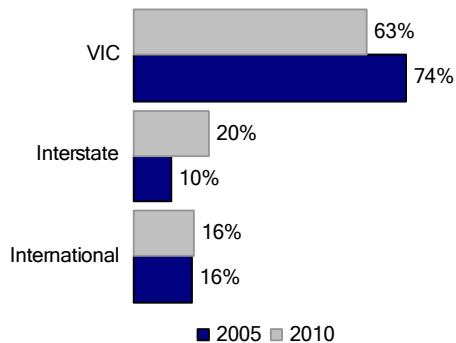
The purpose of visit for respondents has changed very little between 2005 and 2010. In 2010, there was an increase in the proportion of respondents visiting for “entertainment / special event” purposes (14% compared to 7%). Conversely, 2010 saw a decrease in the proportion of respondents who were visiting for “touring or travelling” (5% compared to 10%).



## 7.3. ORIGIN

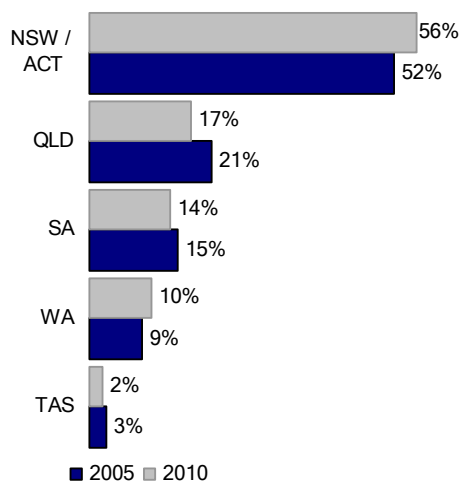
### VISITOR ORIGIN

When compared to 2005, the proportion of respondents in 2010 visiting Bass Coast Shire from Victoria was considerably lower (63% compared to 74% in 2005). This was countered by a significant increase in the proportion of interstate visitors in 2010 when compared to 2005 (20% compared to 10%). The proportion of international visitors remained unchanged between 2005 and 2010.



## INTERSTATE VISITORS

The proportion of visitors from Queensland to the Bass Coast Shire decreased from 21% in 2005 to 17% in 2010. The proportion of visitors from New South Wales / Australian Capital Territory increased from 52% in 2005 to 56% in 2010.



## INTERNATIONAL VISITORS

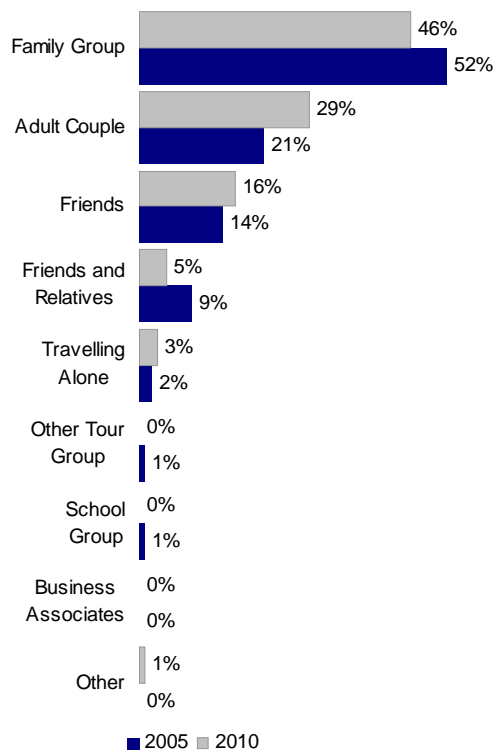
The proportion of visitors from the USA increased considerably between 2005 and 2010, rising from 10% in 2005 to 22% in 2010. Conversely, 2010 saw a decline in the proportion of visitors from New Zealand, the Netherlands, France, Germany and Canada.

Emerging markets include Singapore, India, Thailand, Hong Kong and Taiwan.

Country	2005	2010
USA	10%	22%
UK	20%	22%
Singapore	2%	6%
Canada	10%	6%
New Zealand	8%	4%
Netherlands	8%	4%
Japan	2%	4%
Ireland	4%	4%
Hong Kong	2%	4%
Thailand	2%	3%
India	0%	3%
Germany	6%	3%
France	6%	3%
Taiwan	0%	1%
Mexico	2%	1%
Malaysia	2%	1%
Denmark	0%	1%
China	0%	1%
Chile	0%	1%
Cambodia	0%	1%
Switzerland	2%	0%
Sweden	2%	0%
South Africa	2%	0%
Korea	2%	0%
Italy	4%	0%
Indonesia	6%	0%
<b>Total</b>	<b>100%</b>	<b>100%</b>

#### 7.4. TRAVEL PARTY

The proportion of respondents who visited in a family group decreased from 52% in 2005 to 46% in 2010. The proportion of respondents visiting friends and relatives also decreased from 9% in 2005 to 5% in 2010. The proportion of visitors travelling in an adult couple increased in 2010 (21% compared to 29%).





## 8. HOLIDAY HOME OWNERS

### 8.1. INTRODUCTION

This section provides the results from the Bass Coast Shire Holiday Home and Rental Accommodation Owner's Survey prepared by Urban Enterprise and distributed in June 2009 to holiday home owners in the Bass Coast Shire. The results have whenever possible been compared to results from a previous survey undertaken by Urban Enterprise relating to the calendar year 2004.

The purpose of this section is to provide information about holiday home owners in order to assist Council in understanding the economic impact of tourism on the local economy. Key information obtained through the survey includes:

- Location of holiday home;
- Reason for purchase and duration of holiday home ownership;
- Visitation information;
- Popular activities undertaken;
- Expenditure, and
- Intentions for future use.

Additional data provided by the Bass Coast Shire Council has also been analysed by Urban Enterprise and presented in this report. Additional data includes:

- The number of holiday homes in Bass Coast Shire and on Phillip Island;
- The suburbs in which holiday home owners have their usual place of residence.

### 8.2. HOLIDAY RENTALS

The survey indicates that 3,896 holiday homes in the Bass Coast Shire are available for short-term holiday rental. It should be noted that the holiday homes available for short-term rental are not necessarily exclusively available for this purpose. Survey results indicate that most homes are used by their owners at certain times as well as made available for rental at other times. Therefore the results from these surveys have been included in the database.

Surveys in which the owner indicated the property is not a holiday home and surveys in which all questions were left blank have been removed from the database for the purposes of extrapolation and analysis.

### 8.3. NUMBER OF HOLIDAY HOMES

11,393 holiday homes were identified from the Bass Coast Shire property database from a total of 21,024 residential properties in the Shire. This is 54% of all residential dwellings.

This is generally verified by an analysis of unoccupied dwellings as identified by the ABS 2006 census in Bass Coast Shire. The proportion of unoccupied dwellings on census night was 48%.

#### 8.4. LOCATION OF HOLIDAY HOMES

The following table shows the location of holiday homes in the Shire. Inverloch contains the most holiday homes on the Mainland while Cowes contains the most holiday homes in Phillip Island.

Town	Number of holiday homes	% of total holiday homes
Inverloch	1,995	18%
Cape Paterson	665	6%
San Remo	503	4%
Coronet Bay	505	4%
Kilcunda	102	1%
Corinella	161	1%
Wonthaggi	334	3%
North Wonthaggi	90	1%
South Dudley	31	0%
Dalyston	36	0%
Grantville	110	1%
Harmers Haven	46	0%
Pioneer Bay	55	0%
Tenby Point	43	0%
Jam Jerrup	24	0%
Other	30	0%
<b>Total Mainland</b>	<b>4,730</b>	<b>42%</b>
Cowes	2,828	25%
Cape Woolamai	1,058	9%
Ventnor	689	6%
Smiths Beach	431	4%
Surf Beach	378	3%
Silverleaves	388	3%
Rhyll	222	2%
Sunderland Bay	205	2%
Newhaven	101	1%
Sunset Strip	163	1%
Wimbledon Heights	149	1%
<b>Total Phillip Island</b>	<b>6,612</b>	<b>58%</b>
<b>Total Bass Coast</b>	<b>11,342</b>	<b>100%</b>

Source: Non-resident Ratepayers database, Bass Coast Shire Council, 2009.

## 8.5. ORIGIN OF HOLIDAY HOME OWNERS

### 8.5.1. ORIGIN OF HOLIDAY HOME OWNERS

84% of holiday homeowners in 2008 lived in Metropolitan Melbourne. A further 13% lived in country Victoria and 3% of holiday homeowners lived interstate. The number of interstate holiday homeowners increased from 1% of owners to 3% since 2004.

Origin of Owners	2004		2008	
	Number of Owners	Percentage of Owners	Number of Owners	Percentage of Owners
Metropolitan Melbourne	8,622	87%	9,527	84%
Country Victoria	1,188	12%	1,474	13%
Combined	9,810	99%	10,968	96%
Interstate	129	1%	374	4%
<b>Total</b>	<b>9,939</b>	<b>100%</b>	<b>11,342</b>	<b>100%</b>

Source: Urban Enterprise 2009, utilising data from the Bass Coast Shire Holiday Homeowners Survey

### 8.5.2. ORIGIN OF HOLIDAY HOME OWNERS– MELBOURNE METROPOLITAN AREA

The following table shows the suburbs of Melbourne that have the highest number of owners of holiday homes in the Bass Coast Shire. Mount Waverley, Glen Waverley, Berwick and Rowville were in the top 5 most common suburbs of origin in both 2004 and 2008.

The most common suburb of origin is now Melbourne, which was not identified as one of the most common suburbs of origin in 2004. This may be attributed to an increase in inner city residential dwellings.

2004			2008		
Suburb	Number of holiday home owners	% of Bass Coast holiday home owners	Suburb	Number of holiday home owners	% of Bass Coast holiday home owners
Mount Waverley	197	2%	Melbourne	428	4%
Glen Waverley	183	2%	Mount Waverley	200	2%
Berwick	138	1%	Berwick	198	2%
Rowville	103	1%	Glen Waverley	166	1%
Ferntree Gully	94	1%	Rowville	110	1%
Doncaster East	93	1%	Glen Iris	105	1%
Kew	90	1%	Kew	98	1%
Croydon	87	1%	Croydon	97	1%
Mooroolbark	87	1%	Ferntree Gully	94	1%
Reservoir	86	1%	Whealers Hill	94	1%
Narre Warren	84	1%	Camberwell	90	1%
Eltham	83	1%	Blackburn	88	1%
Frankston	82	1%	Eltham	88	1%
-	-	-	Frankston	88	1%

Source: Urban Enterprise 2009, utilising data from the Bass Coast Shire Holiday Homeowners Survey

### 8.5.3. ORIGIN OF HOLIDAY HOME OWNERS– INTERSTATE

The following table shows the origin of interstate holiday homeowners. Most interstate holiday homeowners live in New South Wales or Queensland. The number of holiday home owners with an interstate permanent address has increased substantially from 128 in 2004 to 374 in 2008.

State	2004		2008	
	Number of holiday home owners	% of interstate total Holiday home owners	Number of holiday home owners	% of interstate total Holiday home owners
NSW	55	43%	158	42%
QLD	32	25%	84	22%
ACT	7	5%	40	11%
NT	10	8%	20	5%
SA	4	3%	14	4%
TAS	7	5%	15	4%
WA	13	10%	43	12%
<b>Total:</b>	<b>128</b>	<b>100%</b>	<b>374</b>	<b>100%</b>

Source: Urban Enterprise 2009, utilising data from the Bass Coast Shire Holiday Homeowners Survey

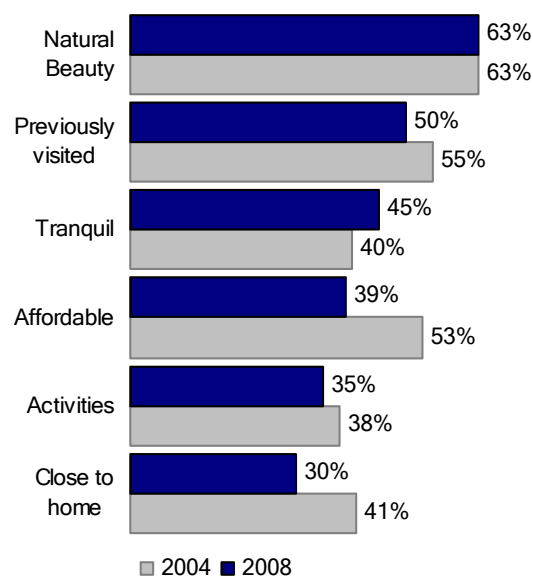
### 8.6. CHARACTERISTICS OF HOLIDAY HOME OWNERSHIP

#### REASON FOR PURCHASE OF HOLIDAY HOME

In both 2004 and 2008, 63% of holiday homeowners purchased in Bass Coast Shire due to the “natural beauty” of the area.

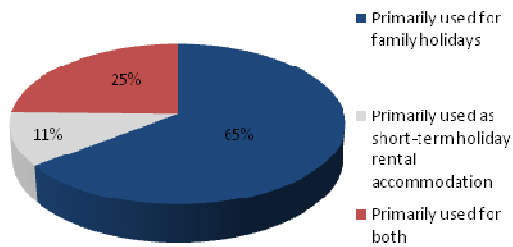
In 2004, 53% of holiday homeowners purchased in the Bass Coast Shire because it was “affordable” however this decreased to 39% in 2008, indicating a decrease in housing affordability in the Shire.

In 2004, 41% of respondents stated that their reason for purchase was that Bass Coast Shire was “close to home”. This “decreased” to 30% in 2008.



### CURRENT STATUS OF HOLIDAY HOME

65% of holiday homes were used primarily for family holidays in 2008. 25% of holiday homes were used for both family holidays and short-term holiday rental accommodation. The remaining 11% were used primarily as short term holiday rental accommodation.

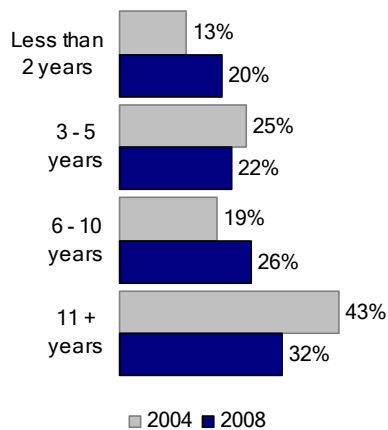


### DURATION OF HOLIDAY HOME OWNERSHIP

32% of holiday home owners have owned their home for more than 11 years. This decreased from 43% in 2004.

The number of holiday homeowners that have owned their holiday home for less than 2 years has increased from 13% in 2004 to 20% in 2008.

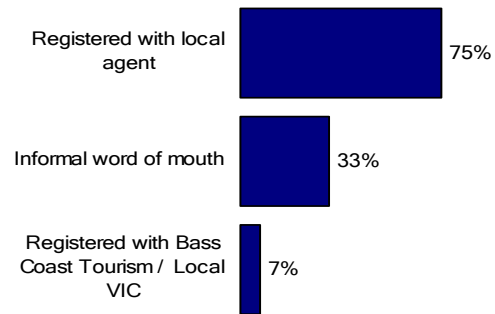
These findings indicate a high level of holiday home turnover in the past 5 years.



### METHOD OF ADVERTISING

Of the respondents that have used their holiday homes as short-term holiday rental properties, 75% are registered with local Real Estate Agents.

33% rely on "word of mouth", whilst only 7% are registered with Bass Coast Tourism/Local VIC (Visitor Information Centre).



### MOST POPULAR HOLIDAY RENTAL AGENCIES

Name of Agency	Proportion using Agency
Stockdale & Leggo Real Estate Inverloch	22%
ResCom Cowes	17%
Judith Wright Real Estate Phillip Island	13%
Southcoast First National Real Estate	10%
PBE Real Estate	9%

Of the survey respondents that are registered with a local real estate agent, 22% are registered with Stockdale & Leggo Real Estate Inverloch. All of the five most popular real estate agents are located within the Bass Coast Shire.

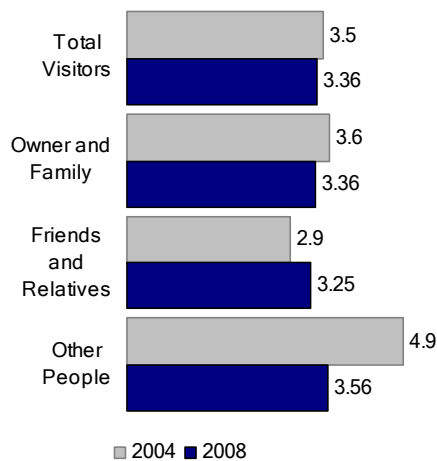
## 8.7. VISITATION GENERATED BY HOLIDAY HOMES

### 8.7.1. BASS COAST SHIRE

#### AVERAGE LENGTH OF STAY

The average length of stay for visitors to holiday homes fell slightly from 3.5 days per visit in 2004 to 3.36 days per visit in 2008.

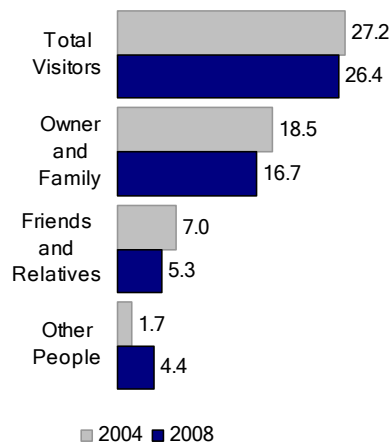
“Other people” (short-term holiday renters) have the longest average length of stay, although the average length of stay fell from 4.9 days to 3.56 days in 2008.



#### AVERAGE NUMBER OF VISITS

The average number of visits to holiday homes in the Bass Coast Shire remains at approximately 27 per year per home. Owners and family visit most frequently with 18.5 visits per annum in 2004 and 16.7 visits per annum in 2008.

“Other people” (short-term holiday renters) visited more frequently in 2008, compared with 2004.

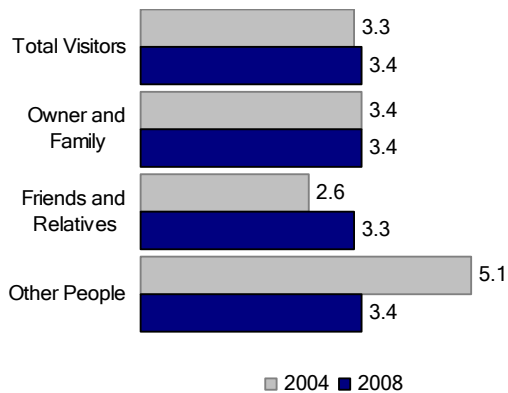


### 8.7.2. PHILLIP ISLAND

#### AVERAGE LENGTH OF STAY

The average length of stay for visitors to holiday homes in Phillip Island rose slightly from 3.3 days per visit in 2004 to 3.4 days per visit in 2008..

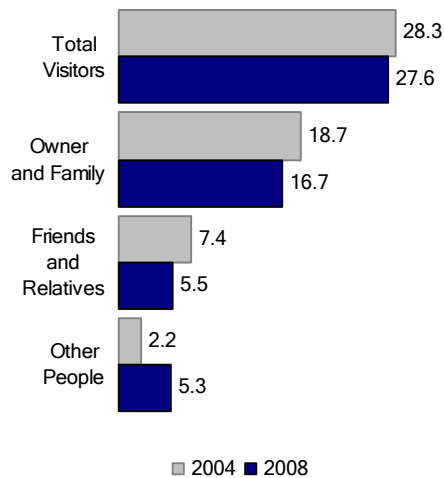
Average "length of stay" was around 3.4 nights for all visitor types in 2008.



#### AVERAGE NUMBER OF VISITS

The average number of visits to holiday homes in the Bass Coast Shire has remained constant at around 28 per year per home. Owners and family visit most frequently with 18.7 visits per annum in 2004 and 16.7 visits per annum in 2008.

"Other people" visited more frequently in 2008, compared with 2004.



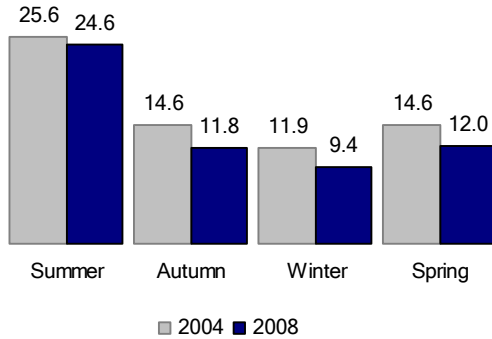


## 8.8. VISITATION TO HOLIDAY HOMES BY SEASON

### DAYS SPENT AT HOLIDAY HOME BY SEASON

#### OWNER AND FAMILY

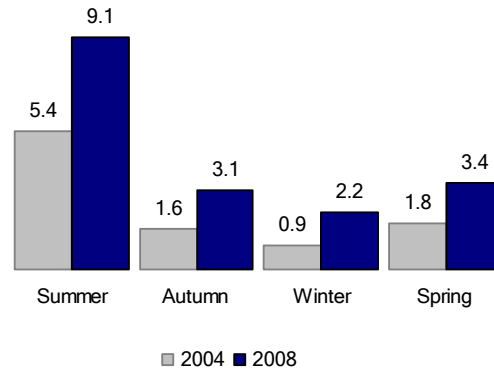
The number of days spent each season by the owner and their family was lower in 2008 compared to 2004.



#### OTHER VISITORS

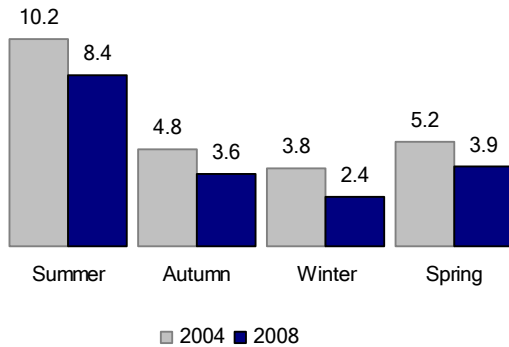
The number of days spent each season by other visitors is significantly higher in 2008 compared to 2004.

Other visitors spent an extra 3.7 days during the 2008 summer compared to the 2004 summer.



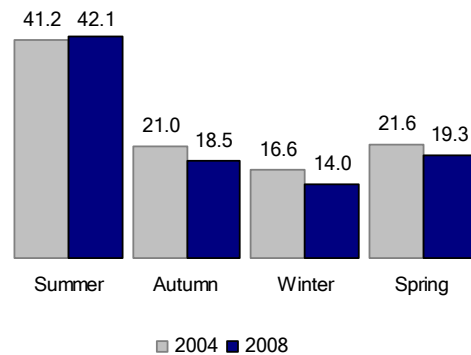
#### FRIENDS AND RELATIVES

The number of days spent each season by friends and relatives is lower in 2008 compared to 2004.



#### ALL VISITORS

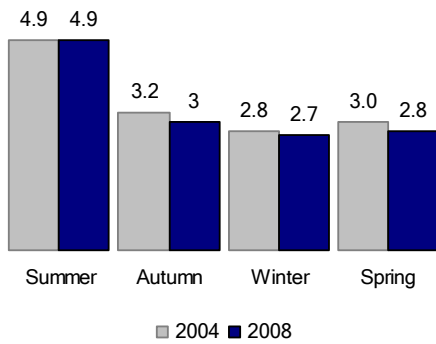
In 2008, 42.1% of visitor days spent in holiday homes were in the summer months, compared to 41.2% in 2004. This is more than double that of any other season.



## AVERAGE LENGTH OF STAY BY SEASON

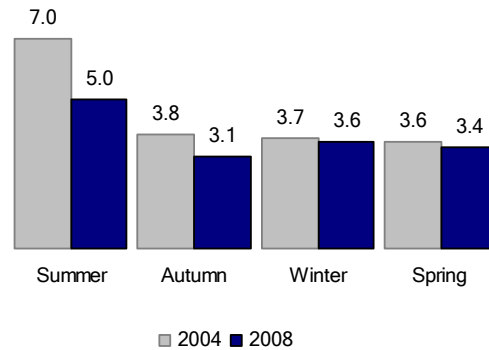
### OWNER AND FAMILY

The average length of stay by the owner and their family fell slightly in 2008 during the autumn, winter and spring seasons.



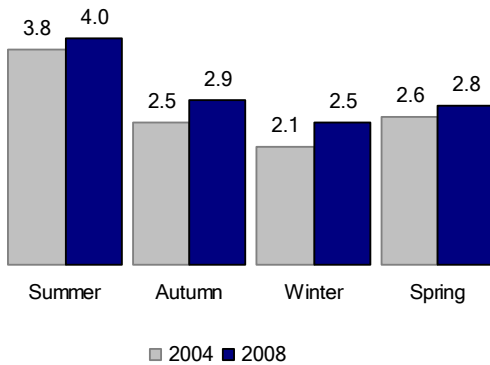
### OTHER VISITORS

The average length of stay in 2008 by "other visitors" fell in all seasons compared to 2004. Other visitors stayed on average the longest in each season of all visitor types.



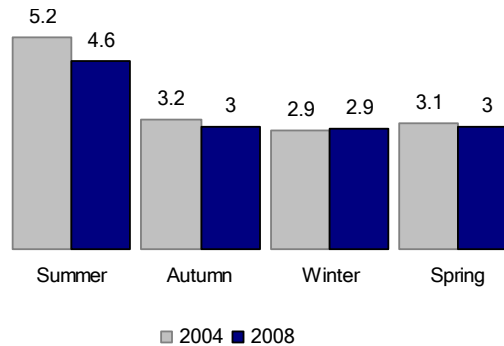
### FRIENDS AND RELATIVES

The average length of stay by friends and relatives rose slightly in all seasons in 2008.



### ALL VISITORS

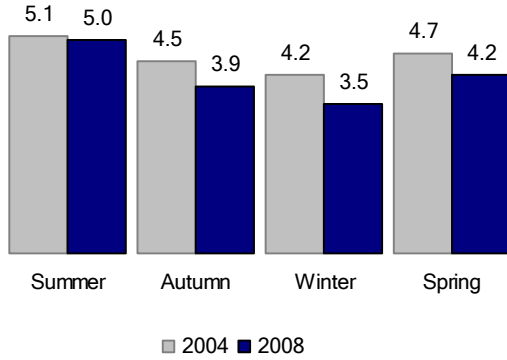
Visitors to holiday homes stayed longest in summer, an average of 4.6 nights.



## AVERAGE NUMBER OF VISITS BY SEASON

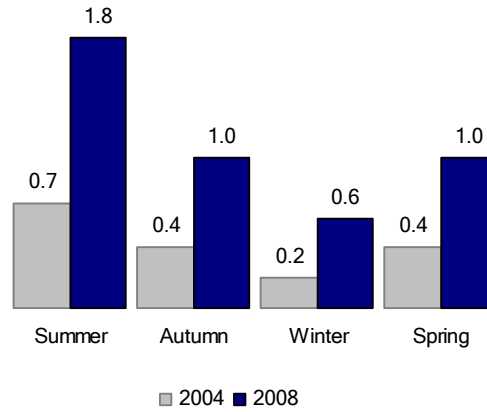
### OWNER AND FAMILY

The average number of visits made by the owner and their family fell in 2008 compared to 2004.



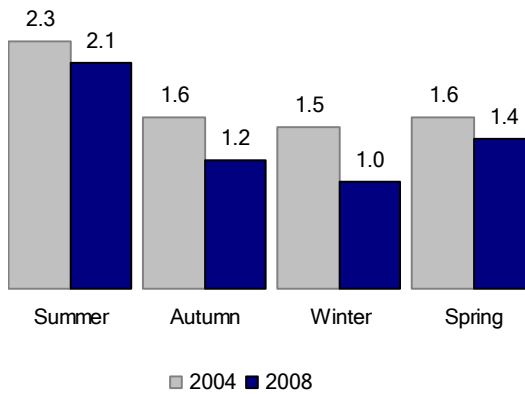
### OTHER VISITORS

The average number of visits made by other visitors increased in 2008 compared to 2004. "Other visitors" visited 1.1 times more in summer 2008 than in summer 2004.



### FRIENDS AND RELATIVES

The average number of visits made by friends and relatives fell in 2008 compared to 2004.

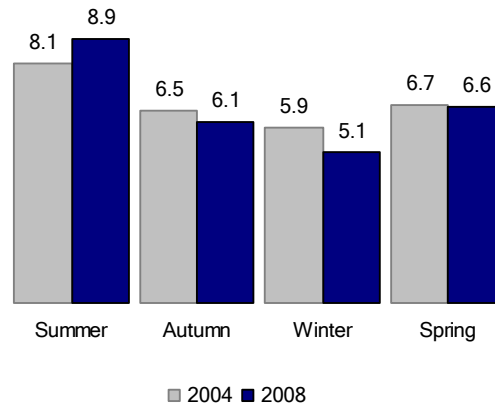


### ALL VISITORS

The average number of visits to holiday homes for all visitors in summer increased in 2008, this was largely due to a significant increase in the average number of visits made by other visitors.

Average visits in autumn, winter and spring fell in 2008 compared to 2004.

Holiday homes were visited on average 2.6 times less in autumn and spring than summer.



## 8.9. ACTIVITIES UNDERTAKEN BY VISITORS STAYING IN HOLIDAY HOMES POPULAR ACTIVITIES UNDERTAKEN

In 2008 the most popular activity undertaken by visitors staying in holiday homes was “going to the beach” (94%). Other popular activities undertaken include “eating out” (66%), “sightseeing” (55%) and “shopping” (50%).

There was an increase in the proportion of visitors going to the beach, eating out, visiting local produce/markets, and cycling.

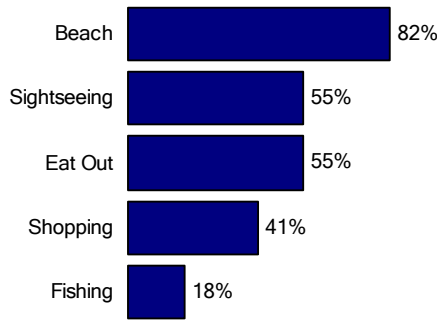
Activity	2004	2008
Beach	90%	94%
Eat Out	58%	66%
Sightseeing	54%	55%
Shopping	49%	50%
Fishing	43%	36%
Local Produce/Markets	42%	46%
Touring	41%	35%
Festivals	40%	40%
Visit Friends & Relatives	39%	37%
Surfing	38%	40%
Bushwalking	33%	27%
Boating	30%	24%
Cycling	29%	35%
Picnics	27%	24%
Wildlife	25%	15%
Historical Buildings/Sites/Landmarks	19%	17%
Wineries	19%	20%
Other Outdoor Activities	18%	18%
Man-made Attractions	17%	11%
Other Sports	14%	11%
Organised Sports Events	11%	8%
Visit Farms	9%	4%
Guided Tours	3%	2%

Source: Bass Coast Shire Economic Impact of Tourism Report 2005 Urban Enterprise 2009, utilising data from the Holiday Home and Rental Accommodation Owner's Survey.

**POPULAR ACTIVITIES BY LOCATION**

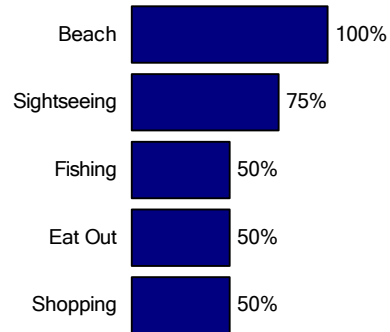
**CAPE PATERSON (2004)**

In 2004, 82% of persons staying in holiday homes in Cape Paterson “go to the beach”. 55% of people staying in holiday homes in Cape Paterson “go sightseeing and 55% “eat out”.



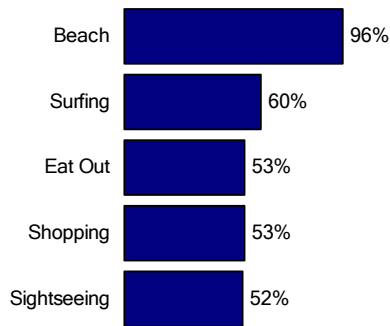
**CAPE WOOLAMAI (2004)**

In 2004, all survey respondents staying in holiday homes in Cape Woolamai “go to the beach”. A further 75% “go sightseeing”.



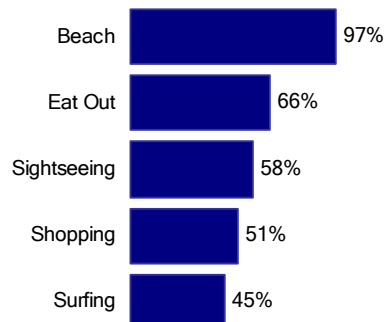
**CAPE PATERSON (2008)**

In 2008, 96% of persons staying in holiday homes in Cape Paterson “go to the beach”. 60% of people staying in holiday homes in Cape Paterson “go surfing/body boarding” and 53% “eat out”.



**CAPE WOOLAMAI (2008)**

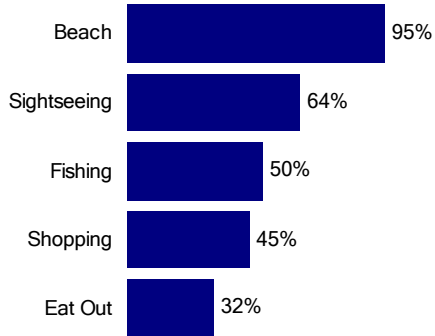
In 2008, 97% of survey respondents staying in holiday homes in Cape Woolamai “go to the beach”. A further 66% “eat out” and 58% “go sightseeing”.



#### CORONET BAY (2004)

In 2004, 95% of people staying in Coronet Bay “go to the beach”.

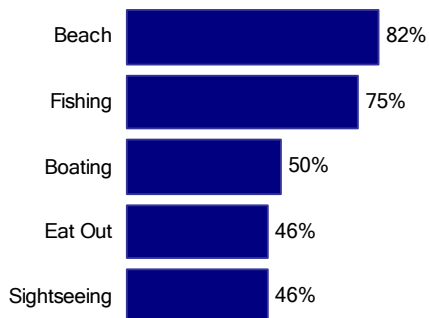
A further 64% of visitors “go sightseeing”.



#### CORONET BAY (2008)

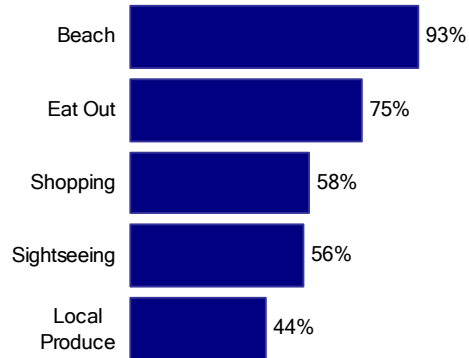
In 2008, 82% of people staying in Coronet Bay “go to the beach”.

A further 75% of visitors “go fishing”.



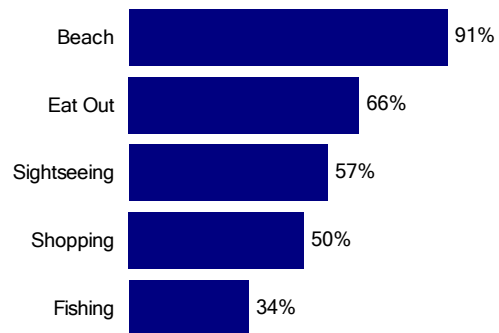
#### COWES (2004)

In 2004, the most popular activity for persons staying in holiday homes in Cowes is “going to the beach” (91%). Other popular activities are “eating out” (66%) and “sightseeing” (57%).



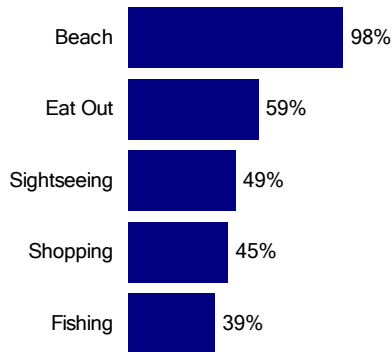
#### COWES (2008)

In 2008, the most popular activity for persons staying in holiday homes in Cowes is “going to the beach” (93%). Other popular activities are “eating out” (75%) and “shopping” (58%).



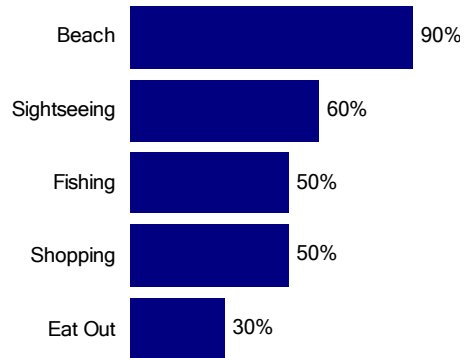
**INVERLOCH (2004)**

"Going to the beach" (98%) is the most popular activity for people staying in holiday homes in Inverloch in 2004. "Eating out" (59%) and "sightseeing" (49%) are also popular activities.



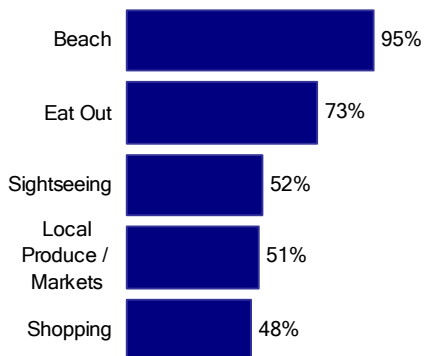
**VENTNOR (2004)**

In 2004 the most popular activities for people staying in Ventnor are "going to the beach" (90%) and "sightseeing" (60%).



**INVERLOCH (2008)**

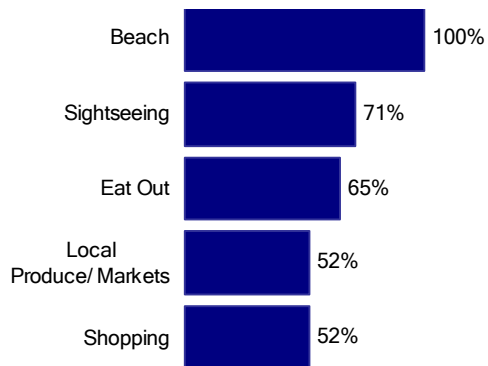
"Going to the beach" (95%) is the most popular activity for people staying in holiday homes in Inverloch in 2008. "Eating out" (73%) and "sightseeing" (52%) are also popular activities.



**VENTNOR (2008)**

In 2008 all survey respondents staying in holiday homes in Ventnor "go to the beach".

A further 71% "go sightseeing" and 65% "eat out".



## 8.10. EXPENDITURE BY VISITORS STAYING IN HOLIDAY HOMES

### BASS COAST SHIRE

#### AVERAGE SPEND PER VISITOR

Visitors staying in holiday homes in 2008 in the Bass Coast Shire spent an estimated \$161 per person per visit in 2008, compared to \$189 per person per visit in 2004.

However, expenditure on food and drink rose by 55% over the period 2004 to 2008.

Expenditure Category	2004	2008
Travel	\$20	\$14
Food & Drink	\$49	\$76
Shopping	\$35	\$40
Entertainment	\$26	\$15
Attractions	\$28	\$6
Other	\$31	\$10
<b>Total</b>	<b>\$189</b>	<b>\$161</b>

### PHILLIP ISLAND

#### AVERAGE SPEND PER VISITOR

Visitors staying in holiday homes in 2008 on Phillip Island spent an estimated \$154 per person per visit in 2008, compared to \$171 per visit in 2004.

Expenditure on food and drink rose by 42% over the period 2004 to 2008. This is in part explained by the cost of food increasing by approximately 17% over the period (CPI).

Expenditure Category	2004	2008
Travel	\$17	\$13
Food & Drink	\$48	\$68
Shopping	\$33	\$35
Entertainment	\$24	\$17
Attractions	\$16	\$10
Other	\$33	\$11
<b>Total</b>	<b>\$171</b>	<b>\$154</b>



## 8.11. EXPENDITURE ON HOLIDAY HOME MAINTENANCE

### BASS COAST SHIRE

#### TOTAL EXPENDITURE

Holiday home owners in the Bass Coast Shire spent an estimated \$55 million on their holiday homes/rentals in 2008.

The question has been changed from the 2004 study, which makes it difficult to make assumptions regarding the overall increase in household expenditure.

Item	Total Expenditure 2004	Total Expenditure 2008
Home maintenance	\$14,918,071	\$21,812,487
Garden maintenance	\$6,412,569	\$4,283,121
Furniture and fittings	N/A*	\$18,135,591
Bedding, towels and linen	N/A*	\$1,887,419
Cleaning services	N/A*	\$2,276,908
Other	N/A*	\$6,608,523
<b>Total</b>	<b>\$21,330,640</b>	<b>\$55,004,050</b>

\*Not Available. Information was not collected in 2004 Survey

#### EXPENDITURE PER HOLIDAY HOME

Holiday home owners in the Bass Coast Shire spent an average of \$4,800 on their holiday home/rental in 2008, including almost \$2000 on maintenance.

The question has been changed from the 2004 study, which makes it difficult to make assumptions regarding the overall increase in household expenditure.

Item	Total Expenditure 2004	Total Expenditure 2008
Home maintenance	\$1,501	\$1,915
Garden maintenance	\$645	\$376
Furniture and fittings	N/A*	\$1,592
Bedding, towels and linen	N/A*	\$166
Cleaning services	N/A*	\$200
Other	N/A*	\$580
<b>Total</b>	<b>\$2,146</b>	<b>\$4,828</b>

\*Not Available. Information was not collected in 2004 Survey

## PHILLIP ISLAND

### TOTAL EXPENDITURE

Holiday home owners on Phillip Island spent an estimated \$24 million on their holiday home/rental in 2008.

The question has been changed from the 2004 study, which makes it difficult to make assumptions regarding the overall increase in household expenditure.

Item	Total Expenditure 2004	Total Expenditure 2008
Home maintenance	\$7,491,900	\$10,723,546
Garden maintenance	\$3,116,920	\$1,756,495
Furniture and fittings	N/A*	\$5,431,539
Bedding, towels and linen	N/A*	\$621,578
Cleaning services	N/A*	\$1,322,234
Other	N/A*	\$3,660,957
<b>Total</b>	<b>\$10,608,820</b>	<b>\$23,516,349</b>

\*Not Available. Information was not collected in 2004 Survey

### EXPENDITURE PER HOLIDAY HOME

Holiday home owners on Phillip Island spent an average of \$4,000 per holiday home/rental in 2008.

The question has been changed from the 2004 study, which makes it difficult to make assumptions regarding the overall increase in household expenditure.

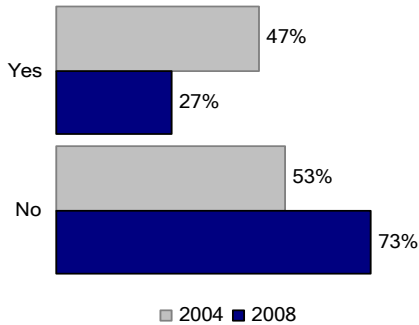
Item	Total Expenditure 2004	Total Expenditure 2008
Home maintenance	\$1,275	\$1,814
Garden maintenance	\$530	\$297
Furniture and fittings	N/A*	\$919
Bedding, towels and linen	N/A*	\$105
Cleaning services	N/A*	\$224
Other	N/A*	\$619
<b>Total</b>	<b>\$1,805</b>	<b>\$3,977</b>

\*Not Available. Information was not collected in 2004 Survey

## 8.12. INTENTIONS FOR FUTURE USE

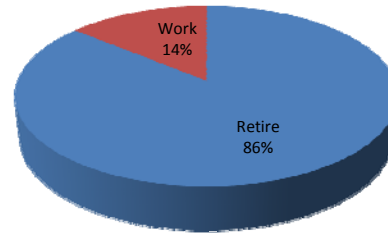
### PERMANENT USE OF HOLIDAY HOMES

The proportion of holiday homeowners intending to live permanently in their holiday home in the future has decreased significantly from 47% in 2004 to 27% in 2008. This may be linked to a large number of new holiday home owners in that period.



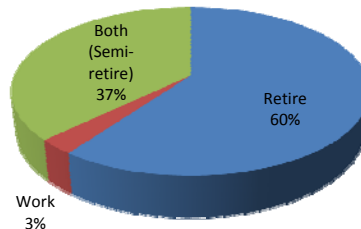
### INTENTION TO RETIRE OR WORK (2004)

Of those who intend to live permanently in their holiday home in the future, 86% plan to retire to Bass Coast, with only 14% intending to work.



### INTENTION TO RETIRE OR WORK (2008)

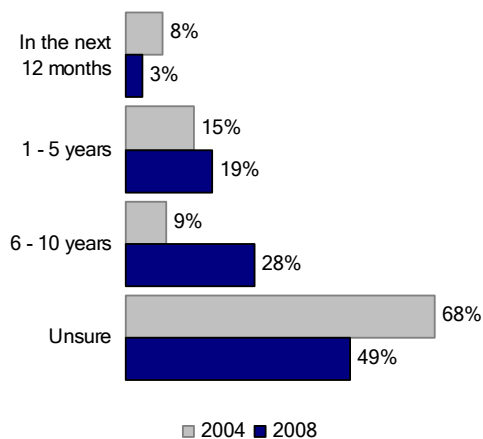
Of those who intend to live permanently in their holiday home in the future, 60% plan to retire to Bass Coast and 37% plan to semi-retire whilst undertaking some form of work. Only 3% plan to live permanently in the Bass Coast Shire and continue full-time work.



### TIMING OF PERMANENT USE

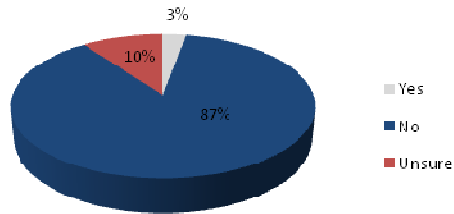
Of those who intend to live permanently in their holiday home in the future, only 19% intend to do so in the next 1-5 years.

49% of those who intend to live permanently in their holiday home are unsure of when this may occur.



### INTENTIONS TO SELL PROPERTY

Of the survey respondents that indicated that they do not intend to live permanently in their holiday home/rental in the future, 3% intend on selling their property within the next 12 months. This equates to 342 holiday homes/rentals that are likely to be put on the market in the next 12 months.



# APPENDICES

## APPENDIX A PAVE METHODOLOGY

## Explanatory Notes

### Data Sources

The following data sources are utilised to inform PAVE:

- National Visitor Survey, Tourism Research Australia, 2007
- Survey of Tourist Accommodation, Australian Bureau of Statistics, 2007
- Bass Coast Shire Tourism Economic Impact Study, Urban Enterprise, 2005
- Economic Impact of Tourism in Prom Country, Urban Enterprise, 2005
- Analysis of Holiday Home Visitors to the Mornington Peninsula, Tourism Research Australia, 2006

### Definitions

**Regional Centre:** Urban Enterprise defines a regional centre as a location with a population greater than 20,000, some examples include Shepparton, Bendigo, Ballarat.

**Township:** A township is usually defined as a “State Suburb”, however this may be modified depending on the particular local area.

**Municipal Balance:** This is an aggregate of any areas outside of the townships which are ordered as part of the PAVE LGA package.

**Municipality.** A Local Government Area defined by the Australian Bureau of Statistics.

**Sub-Regional Input Sheet.** This includes inputs to the program from data collected at the tourism sub regional level: e.g.: Phillip Island Tourism Sub Region.

**Local Input Sheet.** This includes inputs collected at the local area for which PAVE is being prepared for e.g.: Sorrento Township.

**Output Sheet.** This is the output data which has been calculated based on the regional and local inputs. These are the datasets provided to clients.

**Holiday Homes.** These are dwellings which are used on a part time basis by their owners as a second home or for holiday purposes.

**Holiday Home Visitors.** This includes all persons who stay in holiday homes, be it owners, friends and family or holiday home renters.

**Commercial Accommodation.** This is accommodation which is used by visitors to a region that is of a commercial nature. I.e: Hotels, motels, serviced apartments, B&Bs, Guesthouses etc.

Caravan and Camping Accommodation. This is for camping or caravan park sites used on a temporary basis by visitors. This does not include permanent residents in caravan parks. Campgrounds which are not advertised, nor appear in promotional material are not included in the analysis. This may include some foreshore camping areas.

Estimated Resident Population. This is the permanent population of a local area, where by temporary residents and visitors are not included in the population. Usually permanent residents who are not home at the time of census are included in estimated resident population.

Visitor Nights. The total number of nights in which a person is present in the particular local area.  $\text{Visitor Arrivals} \times \text{Length of Stay}$

Guest Arrivals. The total number of paying guests counted only on the first night they stayed at the accommodation establishment during the survey period. For holiday flats, units and houses this is the same as unit lettings.

Daytrip Visitor. A visitor who travels more than 50 kilometres to their destination;

Weekend Visitors. Visitors who visit the local area on a Saturday or Sunday.

Visitation per Day by Month. The average number of visitors to the local area each day by season.

Total Population per Day. The average number of persons in a local area on each day by season. This includes permanent residents and visitors.

## Limitations and Exclusions

The data does not include visitors who are staying with permanent residents.

The data does not include visitors who are staying in camp grounds, caravan parks and small accommodation establishments that are not advertised or promoted in tourist publications or who are not a member of the local or regional tourist association. For example some foreshore camping areas.

Daytrip visitors are visitors who have travelled more than 50 kms to the destination from their place of residence. Daytrip visitors who travel less than 50kms are not included in daytrip visitor estimates.

## Assumptions

The number of holiday homes is assumed to equal the number of unoccupied dwellings on census night for any given area.

The average number of bed spaces per room in commercial accommodation is assumed to be 2.4.



## Calculations/Methodology

### Number of Visitors Staying in Holiday Homes

$A \times B = C$ , where:

A = Average annual visitors per holiday home (regional input)

B = Number of holiday homes (local input)

C = Number of visitors staying in holiday homes

### Number of Visitors Staying in Commercial Accommodation

$D \times E = F$ , where:

D = Number of annual visitors per room (regional input)

E = Number of guest rooms in commercial accommodation (local input)

F = Number of visitors staying in commercial accommodation

### Number of Visitors Staying in Caravan Parks and Camping Grounds

$G \times H = I$ , where:

G = Number of annual visitors per site (regional input)

H = Number of sites in caravan parks and camping grounds (local input)

I = Number of visitors staying in caravan parks and camping grounds

### Total Overnight Visitors

$I + F + C = k$

K = Total Overnight Visitors

### Number of Daytrip Visitors

$J \times K = L$

J = Proportion of daytrip visitors to total visitors

L = Total number of daytrip visitors

### Seasonality

$K \times M = X$

M = Proportion of visitors by month

X = Number of visitors per month

### Weekend / Weekday Analysis

$K \times N = Y$

N = Proportion of weekday / weekday visitors

Y = Number of visitors by weekend/weekday

**APPENDIX B DIRECT EMPLOYMENT ATTRIBUTED TO TOURISM IN BASS COAST SHIRE 2007/08**

Type of Industry	Total Number of Employees	Number of Employees attributed to Tourism
Accommodation and Food Services	859	859
Retail Trade	1,279	371
Health Care and Social Assistance	968	48
Education and Training	529	37
Manufacturing	595	36
Transport, Postal and Warehousing	200	22
Arts and Recreational Services	261	10
Agriculture, Forestry and Fishing	640	6
Other Services	261	5
Wholesale Trade	226	5
Professional, Scientific and Technical Services	253	3
Administrative and Support Services	187	2
Rental, Hiring and Real Estate Services	165	2
Information Media and Telecommunications	64	1
<b>Total</b>	<b>7,522</b>	<b>1,407</b>

Source: ABS Census Data and Tourism Satellite Accounts, Urban Enterprise 2010