

2 August 2017

**MAYOR
COUNCILLORS
CITY OF MOUNT GAMBIER**

NOTICE is given that the Strategic Standing Committee will meet in the following Meeting Room on the day, date and time as follows:

Strategic Standing Committee
(Committee Room - Level 4):

Monday, 7 August 2017 at 5:30 p.m.

An agenda for the meeting is enclosed.



Mark McSHANE
CHIEF EXECUTIVE OFFICER

AGENDA INDEX

1.	APOLOGY(IES)	1
2.	CONFIRMATION OF STRATEGIC STANDING COMMITTEE MINUTES	1
3.	QUESTIONS	1
	3.1. With Notice	1
	3.2. Without Notice	1
4.	DEPUTATIONS	1
5.	STRATEGIC STANDING COMMITTEE REPORTS	2
	5.1. Tourism Data Collection - Report No. AR17/29485.....	3
	5.2. Signage Strategy - Report No. AR17/29113	6
	5.3. City Hall Commercial Kitchen Future Operation - Report No. AR17/28073.....	9
	5.4. City Growth Strategy - Report No. AR17/29794.....	12
6.	MOTION(S)	17
	6.1. With Notice	17
	6.2. Without Notice	17
7.	REPORT ATTACHMENTS	18



AGENDA OF STRATEGIC STANDING COMMITTEE MEETING

Meeting to be held in the Committee Room, Civic Centre, 10 Watson Terrace, Mount Gambier
on Monday, 7 August 2017 at 5:30 p.m.

PRESENT	Mayor Andrew Lee	
	Cr Josh Lynagh	
	Cr Sonya Mezinec	
	Cr Frank Morello	
	Cr Hanna Persello	
	Cr Penny Richardson	
COUNCIL OFFICERS	Chief Executive Officer	- Mr M McShane
	General Manager Community Wellbeing	- Ms B Cernovskis
	General Manager Council Business Services	- Mrs P Lee
	General Manager City Growth	- Dr J Nagy
	General Manager City Infrastructure	- Mr N Serle
	Manager Governance and Property	- Mr M McCarthy
	Administration Officer	- Mrs F McGregor

WE ACKNOWLEDGE THE BOANDIK PEOPLES AS THE TRADITIONAL CUSTODIANS OF THE LAND WHERE WE MEET TODAY. WE RESPECT THEIR SPIRITUAL RELATIONSHIP WITH THE LAND AND RECOGNISE THE DEEP FEELINGS OF ATTACHMENT OUR INDIGENOUS PEOPLES HAVE WITH THIS LAND.

1. APOLOGY(IES)

Apology(ies) received from .

That the apology from be received.

Moved: Seconded:

2. CONFIRMATION OF STRATEGIC STANDING COMMITTEE MINUTES

Meeting held on 10 July, 2017.

That the minutes of the Strategic Standing Committee meeting held on 10 July 2017 be confirmed as an accurate record of the proceedings of that meeting.

Moved: Seconded:

3. QUESTIONS

3.1. With Notice

Nil submitted.

3.2. Without Notice

4. DEPUTATIONS

Nil



5. STRATEGIC STANDING COMMITTEE REPORTS

Strategic Standing Committee Reports commence on the following page.



5.1. Tourism Data Collection - Report No. AR17/29485

COMMITTEE	Strategic Standing Committee
MEETING DATE:	7 August 2017
REPORT NO.	AR17/29485
RM8 REFERENCE	AF17/7
AUTHOR	Judy Nagy
SUMMARY	The Greenhill Research and Planning Report for the 2017 Mount Gambier Tourism Data Collection has been received and been the presented to Elected Members in a workshop. The final report is now presented for endorsement.
COMMUNITY PLAN REFERENCE	Goal 2: Our Location
	Goal 3: Our Diverse Economy
	Goal 4: Our Climate, Natural Resources, Arts, Culture and Heritage

REPORT RECOMMENDATION

- (a) That Strategic Standing Committee Report No. AR17/29485 titled '*Tourism Data Collection Report*' as presented to the Strategic Standing Committee on 7 August 2017 be noted.

Moved:

Seconded:



Background

As part of the partnership agreement with Tourism Mount Gambier it was recognised that the ability to improve the visitor economy required a more detailed knowledge about particular tourism behaviours specifically in Mount Gambier. Research data is often available at the National, State and Local level but it is not always appropriate or applicable to specific locations in regional areas. Understanding consumer needs and preferences and targeting the right customer all helps when marketing an area and maximising the City's visitor economy.

Consultants Greenhill Research Planning were the successful tenderers for the data collection project commissioned to provide evidence to inform collective action to attract visitors, improve visitor experiences and encourage visitors to stay for extended periods.

Two surveys were to be undertaken with data collection taking place in person and also available electronically. The two survey's included

- Consumer survey to better understand needs and preferences of visitors; and
- External survey targeted at a selective audience, such as tourism wholesalers

Greenhill were asked to prepare a visitor profile that included demographic details and behavioural characteristics such as age, sex, accommodation preferences, travel party size, season of travel and spending behaviour.

Discussion

The report involved collecting data via a survey from tourists visiting Mount Gambier tourist attractions during March /April 2017. The tourism visitor data represents a snapshot of visitors at a point in time and data will reflect the time of year when data was collected as well as the types of visitors that typically come during that time period. For example, overseas visitors are more likely to travel during the northern summer period of July/August and over the Christmas break and are not well represented in the data collection process.

The data report identifies that tourism products need to identify which market demographic is being targeted rather than treating all visitors as one generic group. Identifying what attractions may appeal to a younger or international visitors compared with travellers from interstate by appealing to the discoverers, indulgers or activity seekers would allow for more strategic marketing of tourism products.

Recommendations in the report concur with findings in the Tourism and Visitor Information Services Review and the Signage Strategy Report that highlight a need for better targeted branding of our major attractions as a collective experience with a need to focus on visitor attraction using new media. The need to focus on digital content as the primary marketing tool for the region was particularly noted as being important for the future.

Conclusion

The data report has in many ways provided affirmation of the need to develop more digital collateral for tourism products, that there is a need to improve visitor signage (also confirmed in the Signage Report) and that Tourism experiences need to be better packaged, and promoted to specific rather than generic market segments.



The work being conducted in partnership with Tourism Mount Gambier is already making progress on the issues of digital content and in identifying experiences rather than locations to attract visitors to the region. This work also ties in with strategies identified in the *Building a Connected Regional City - Digital Strategy and Action Plan* endorsed in November 2016.

Attachments

[Attachment 1 \(AR17/29769\): Mount Gambier Tourism Data Collection - Report - Final 27/07/2017](#)



Judy NAGY
GENERAL MANAGER CITY GROWTH



Mark McSHANE
CHIEF EXECUTIVE OFFICER

1 July 2017
AL/MJT



5.2. Signage Strategy - Report No. AR17/29113

COMMITTEE	Strategic Standing Committee
MEETING DATE:	7 August 2017
REPORT NO.	AR17/29113
RM8 REFERENCE	AF17/228
AUTHOR	General Manager City Growth
SUMMARY	The Draft Signage Strategy Report that was the subject of an Elected Members workshop on 17 th July 2017 has been finalised and is presented for endorsement.
COMMUNITY PLAN REFERENCE	Goal 2: Our Location
	Goal 3: Our Diverse Economy
	Goal 4: Our Climate, Natural Resources, Arts, Culture and Heritage

REPORT RECOMMENDATION

- (a) That Strategic Standing Committee Report No. AR17/29113 titled '*Signage Strategy Report*' as presented to the Strategic Standing Committee on 7 August 2017 be noted.
- (b) That a Draft Implementation Plan including timeframes, resourcing needs with preliminary estimates is developed by October 2017, for consideration by Councillors, staff and identified stakeholders to inform a Final Implementation Plan.



Background

Signage is a powerful tool for communities to develop a strong brand and identity whilst also providing effective linkages and information for the visitor economy. Current signage across the city reflects many years of incremental additions, lacks directional clarity and a coherent and contemporary approach to messaging. Improving signage in Mount Gambier will significantly enhance a visitor's welcoming experience within the City and improve wayfinding between various locations and attractions. Signage also needs to cater for non English speaking visitors, be engaging, informative, creative and accessible. Improving signage will benefit the local community and economy as visitors will be directed clearly to businesses and visitor locations.

Consultants Minale Tattersfield were the successful tenderers who were engaged to focus on a number of signage issues including the following key objectives;

- Improve wayfinding to destinations within the City of Mount Gambier.
- Ensure that signage is compatible with the desired visual character of the City of Mount Gambier.
- Ensure signage is installed in suitable/ strategic locations.
- Ensure signage is of high quality, design and finish.
- Ensure signage specifically includes links to the digital world e.g. websites, social media, different languages, touch screens and digital rolling messages.
- Existing signage to be specifically reviewed to include gateway entry signs, tourist directional signs, visitor information and interpretive signs and commercial signs.

Key deliverables for the review included;

- A detailed report specifically showing new and existing signage locations and how the digital world can be linked to the sign.
- Indicative costing of new and retrofitting existing signs with the digital linkages.
- A report that has specific actions Council and/or Tourism Mount Gambier can implement.
- Use information Council has on signage hierarchy and any other industry information.
- Implementation hierarchy roadmap and cost.

As part of briefing discussions, the consultants were directed to the following key documents to inform the proposed work plan.

- Community Plan – The Futures Paper 2016-2020
- Building A Connected Regional City – A Digital Strategy and Action Plan for the City of Mount Gambier
- Tourism Mount Gambier Strategic Plan; Changing the Tourism Culture

Discussion

Hans Gerber of Minale Tattersfield engaged in a numbers of consultation meetings that included Elected Members, Council staff, and key stakeholders from Tourism Mount Gambier and the Chamber of Commerce. The report provides a thorough and comprehensive study of signage across the City of Mount Gambier and across our tourist attractions.



Images of current signage range from contemporary as part of the Rail Lands Development to old and needing substantial change to improve functionality and visibility. Comparison with signage used in other regional locations across Australia, confirms that signage across the City are often not well located or provide visitors with engaging content that inspires further exploration of the region.

The report highlights a need for a consistent hierarchy in signage that focusses on Mount Gambier and the Mount Gambier brand within a wider region context. It is suggested that any new signage proposals select from a nested or 'family' group of sign styles to ensure better information clarity and accessibility for visitors using standardised pictograms that are commonly used across the world.

To assist with future decision making the report provides some guidance on the typical costs of various sign types and makes suggestions about action priorities that consultants believe could be prioritised across the city and in key tourism locations.

Conclusion

The signage report will require implementation over a numbers of years with budget allocations in stages to achieve desired improvements in wayfinding and to improve visitor information.

Attachments

[Attachment 1 \(AR17/27392\): City of Mount Gambier SIGNAGE STRATEGY & ACTION \(Note: due to the large file size a link has been provided to an external site\).](#)



Judy NAGY
GENERAL MANAGER CITY GROWTH



Mark McSHANE
CHIEF EXECUTIVE OFFICER

27 July 2017
AL/MJT



5.3. City Hall Commercial Kitchen Future Operation - Report No. AR17/28073

COMMITTEE	Strategic Standing Committee	
MEETING DATE:	7 August 2017	
REPORT NO.	AR17/28073	
RM8 REFERENCE	AF11/2260	
AUTHOR	General Manager Community Wellbeing	
SUMMARY	This report provides directions for the future use of the Commercial and Community kitchens in City Hall.	
COMMUNITY REFERENCE	PLAN	Goal 1: Our People
		Goal 2: Our Location

REPORT RECOMMENDATION
<p>(a) That Strategic Standing Committee Report No. AR17/28073 titled '<i>City Hall Commercial Kitchen Future Operation</i>' as presented to the Strategic Standing Committee on 7 August 2017 be noted.</p> <p>(b) The Commercial Kitchen and Community Kitchen be reconfigured and consolidated into the Commercial Kitchen space.</p> <p>(c) The Community Kitchen equipment where possible is used in the Commercial Kitchen and the Community Kitchen be utilised as storage and/or general purpose area.</p> <p>(d) The City Hall Kitchen be made accessible to:</p> <ul style="list-style-type: none"> • Pre-qualified commercial caterers at a fee and bond recognising the commercial nature of the hire. • General users (non commercial caterers) at a fee and bond recognising the nature of the use. • Council's 2017/2018 building maintenance budget is reviewed and re-prioritised with an amount of up to \$20,000 reallocated to the required City Hall kitchen upgrades.



Background

The Commercial Kitchen (City Hall also has a less well equipped Community Kitchen) has been leased to a commercial operator for approximately five years. The commercial operators (operating as "The Main") have terminated their lease and Council is now in a position to consider the future operation of the commercial kitchen.

City Hall was redeveloped in 2003/04 however the commercial kitchen was installed as a component of the Main Corner/Riddoch Art Gallery building project in 2010/2011 following requests by City Hall users to improve the kitchen facilities. Research indicates a cost of approximately \$200,000 although details of the exact amount spent have been difficult to identify amongst the total costs of the Main Corner development.

In mid 2011 Council called for tenders from commercial caterers to operate the commercial kitchen with the successful company having sole use of the kitchen. Users of City Hall could choose to use the commercial kitchen operator or to select another caterer who could use the community kitchen and at times supplemented by their own catering facilities (mobile vans).

Following the above process a company was awarded the lease for 2 years with two rights of renewal, 3 years and 5 years with initial rental at \$5,000 for the first 12 months, \$7,000 for the second year and then amounts as indicated by independent valuation assessment and CPI.

Over the past five years there have been a number of changes with reassigning of the lease that was permissible under the lease conditions. The most recent lease was held by the owners of Presto, who maintained the name "The Main" for catering within the City Hall. The lessees have vacated the permission and terminated the lease with an effective end date of 30 June 2017.

Discussion

A briefing paper on this issue was provided to Councillors on 30th June, 2017 prior to a Councillor Workshop on 4th July, 2017. There are a number of options to address this issue with a hybrid option seemingly providing the most favoured outcome being:

- The incorporation of some domestic appliances (dishwashers, ovens, pie warmers etc – some from the current community kitchen) into the commercial kitchen.
- Making the commercial kitchen available for general use by hirers at a fee but without access to some specialist catering equipment.
- Pre-qualified commercial caterers may book the kitchen for a set fee, acknowledging the 'full use' including large gas appliances for full cooking and catering in City Hall.
- The current community kitchen would serve as a storage facility, always in need in such a community space.
- Incorporating the bar into hiring but removing some of the equipment due to its limited use, for example beer keg lines and soft drink post mix.

One off costs involved in altering appliances, incorporating appliances from the community kitchen and adjustments in the community kitchen, are estimated to be between \$15,000 and \$20,000. General maintenance of the kitchen will be a small annual cost.

Should the implementation of the above option be endorsed by Council a number of other matters require consideration and implementation by staff including:

- Criteria for pre-qualified catering companies, hire fee and bond.



- Hire fee and bond for general users.
- Establishment of standard operating procedures to be used by staff for the hiring of the facility, for example pre and post check, information to users and security.
- Staff resourcing and ongoing maintenance
- Maintaining compliance with Food Act 2001

Conclusion

The option outlined above achieves a number of outcomes including:

- Broadening commercial caterers access to the Commercial Kitchen (“City Hall Kitchen”) and the bar area and provides choice for City Hall users.
- Consolidates two kitchens into one and improves the facility to the general user (i.e. non-commercial caterer).
- Provides needed storage in the reconfigured community kitchen space.
- Has minimal impact on Council’s operating income from the Commercial Kitchen Lease.
- Potentially broadens the use and appeal of the City Hall.
- Commercial caterers access is restricted to the time of the specific function being catered for, avoiding conflict with other City Hall hirers/users and noise.
- The model does not depend nor is financially reliant on commercial caterers using the kitchen.



Barbara CERNOVSKIS
GENERAL MANAGER COMMUNITY WELLBEING



Mark McSHANE
CHIEF EXECUTIVE OFFICER

19 July 2017
LD



5.4. City Growth Strategy - Report No. AR17/29794

COMMITTEE	Strategic Standing Committee
MEETING DATE:	7 August 2017
REPORT NO.	AR17/29794
RM8 REFERENCE	AF17/42-5
AUTHOR	General Manager City Growth
SUMMARY	The main conclusions of the City Growth Strategy Report are highlighted with Elected Members requested to endorse the final report.
COMMUNITY PLAN REFERENCE	Goal 1: Our People
	Goal 2: Our Location
	Goal 3: Our Diverse Economy
	Goal 4: Our Climate, Natural Resources, Arts, Culture and Heritage

REPORT RECOMMENDATION

- (a) That Strategic Standing Committee Report No. AR17/29794 titled '*Mount Gambier City Growth Strategy 2017-2027*' as presented to the Strategic Standing Committee on 7 August 2017 be noted.
- (b) That a draft implementation framework including timeframes, resourcing needs with preliminary estimates are developed by October 2017, for consideration by Councillors, staff and identified stakeholders to guide discussion and input to a finalised implementation plan.



Background

A successful local economy is a key driver of the wellbeing of a community and Council has an important role to play in leading, promoting and facilitating economic development and supporting the City's residents through the provision of employment, incomes and services.

Previous reports have identified broad aspirational objectives for the community and Council with the need for an overarching key strategic vision for the City of Mount Gambier to assist with achieving the objectives being identified. The strategic vision would identify and provide a series of practical strategies, actions and an implementation plan to drive success and competitiveness of the City now and into the future. The recommendations would inform the development of a City Growth Strategy 2017-2027 for the next ten years.

The strategy utilised data and information from existing source documentation (as outlined below) and gave consideration to:

- Comparative national regional development information, learnings and successes.
- Strategic partnerships.
- Economic indicators including:
 - employment and population growth;
 - ageing population impacts.
- City hubs/clusters: cultural, education, business and community.
- Retail and business/industry expansion and attraction.
- Commercial and residential property development to meet market needs.
- Digital technology adoption and implementation.
- Capital and investment attraction.
- "One stop shop" facilities (Government and community service providers).
- Attraction of Government Agencies and private service providers to provide a diverse employment base.
- Attraction and retention of talent.
- Attraction of new residents.
- Increased City visitation.
- Linkages and collaboration between education, research institutions, business and the region.

Consultants were also referred to the following documents to inform their work:

- *Building a Connected Regional City – A digital strategy and action plan for the City of Mount Gambier.*
- *Economic Scorecard for City of Mount Gambier and Comparative Regions.*
- *A Futures Paper for City Development – City of Mount Gambier*
- *City of Mount Gambier Community Plan 2016-2020.*

Discussion

The successful consultants were ACIL Allen with Ray Gerrand being the principal consultant. Work undertaken included consultation with key stakeholders including Tourism Mount Gambier, Chamber of Commerce, Limestone Coast Regional Development Australia, District Council of Grant and Council.

The report notes that an analysis of the comparative strengths of the City as well as global and national trends highlights three industry sectors which are likely to offer the greatest potential for future growth, these are:

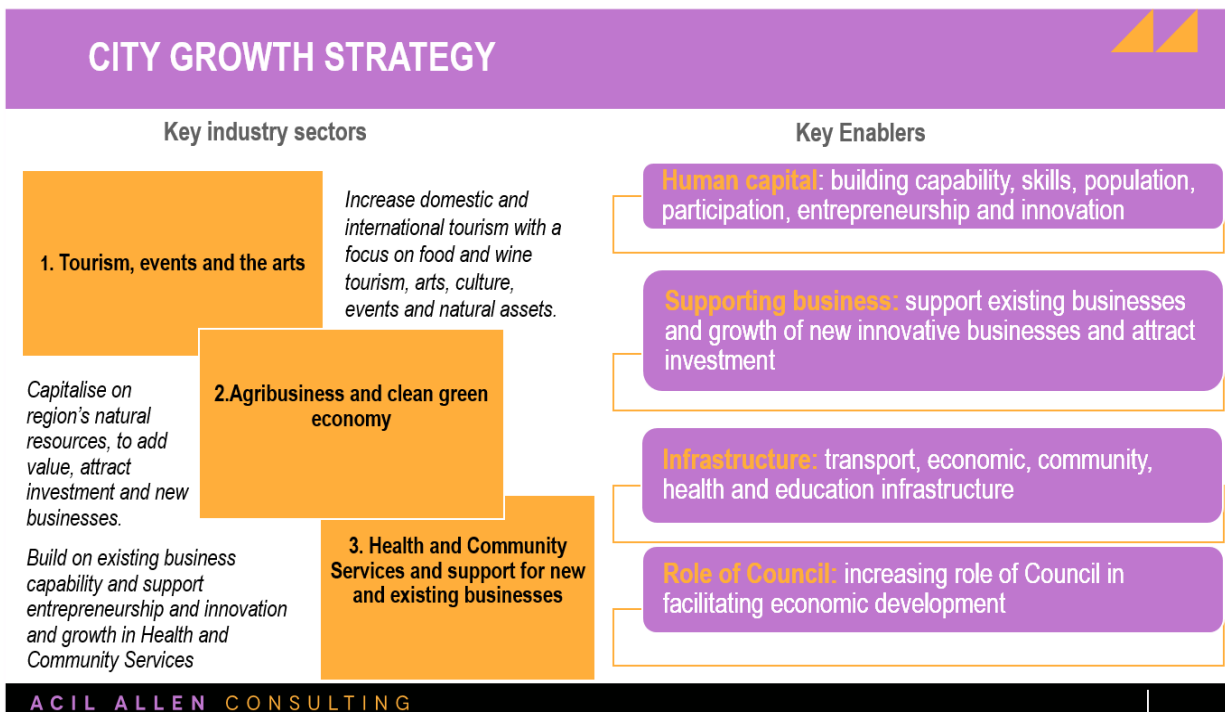


- **Tourism, events and the arts:** increase in domestic and international tourism with a focus on food and wine tourism, arts, culture, events and natural assets.
- **Agribusiness and clean green economy:** capitalise on region’s natural resources, renewable energy, forestry, agriculture, cattle and seafood to add value, attract investment and build new businesses.
- **Health and community services:** growth in health, aged care and community services and leverage opportunities from population ageing.

Fundamentally, the City’s economy will be underpinned by the growth of existing and new small to medium sized businesses, including in retail and professional services. To facilitate growth in these sectors the City will need to focus on a number of key enablers including:

- **Building human capital:** building capability, skills, population, participation, entrepreneurship and innovation
- **Supporting business:** providing the right environment to support existing businesses, facilitate the growth of new innovative businesses and attract investment
- **Investment in economic infrastructure** is one of the key enablers for unlocking the economic development potential of Mount Gambier; this includes transport infrastructure, utilities as well as tourism and community infrastructure.
- **Role of Council:** to implement the *City Growth Strategy* the Council will need to play an increasingly important role in economic development in the future, however, the City of Mount Gambier by itself will not be able to fully implement the *City Growth Strategy*. Full implementation will require strong cooperation between key stakeholders to deliver on a shared economic development vision.

The blend of enablers with key industry sectors is highlighted in this image below.



The report lists 24 recommendations with 10 identified as items that could be considered as priorities. These are noted as follows:

BUILDING HUMAN CAPITAL

Implement a comprehensive migration strategy with a focus on increasing inter-State, intra-State and overseas migration

Investigate with the South Australian Government the opportunity to increase public sector employment in the City of Mount Gambier by 500 people over the next ten years.

ROLE OF COUNCIL AND INFRASTRUCTURE

Develop a comprehensive and targeted China, India and ASEAN engagement strategy with the community, business, tourism and education sectors aimed at increasing trade, migration, investment and bilateral relations in culture and the arts

Develop a Mount Gambier Economic Development Fund to invest in key economic development projects and infrastructure over the next 10 years.

SUPPORTING BUSINESS

Work with the RDA Limestone Coast in undertaking a skills profile of existing businesses and map the future skill needs for key growth sectors and develop a comprehensive workforce development plan to address the training, upskilling and future workforce development needs to support future growth in key sectors, this plan will also help underpin the skilled migration strategy.

Undertake a detailed feasibility study on the costs, funding and business model for the establishment of a Mount Gambier Business Hub and where possible leverage of State and Commonwealth support and services provided by Universities.

Develop a comprehensive marketing campaign including prospectuses and materials that promotes the many competitive strengths of the City and opportunities for business, migration, tourism and future investment.

Provide leadership and support to the implementation of the Tourism Mount Gambier Strategy.

Implement the Digital Strategy and Action Plan for the City of Mount Gambier to better promote tourism opportunities in Mount Gambier, develop content and connectivity with key domestic and international markets.

Continue to actively participate and monitor developments in the State's energy policy, advocating for Mount Gambier's as a potential incubator and pilot site for new ventures in renewables, including battery storage.

Conclusion

The proposed strategies provide short, medium and longer term recommendations to consider and it's pleasing to see that there are strong synergies with other recently completed reports.



Attachments

Nil.



Judy NAGY
GENERAL MANAGER CITY GROWTH



Mark McSHANE
CHIEF EXECUTIVE OFFICER

1 August 2017
MJT



6. MOTION(S)

6.1. With Notice

Nil Submitted

6.2. Without Notice

Meeting closed at p.m.

AR17/28760



7. REPORT ATTACHMENTS



2017 Mount Gambier Tourism Data Collection

Final Report

Submitted to:

The City of Mount Gambier

By:

Greenhill Research and Planning

27th July 2017



Contents

1. Introduction.....	1
2. Summary.....	3
2.1 Visitor Profile.....	3
2.2 Travel Behaviour.....	5
2.3 Visitor Attractions and Activities.....	8
2.4 Likelihood of Recommendation and Visitor Experience.....	9
2.5 Information Sources and Booking Behaviour.....	10
2.6 Visitor Motivation.....	11
2.7 Destination Image and Place Branding.....	13
2.8 Survey of Distributors.....	15
2.9 Survey of Industry Stakeholders.....	17
2.10 Conclusions and Recommendations.....	19
3. Visitor Survey.....	24
3.1 Introduction.....	24
3.2 Visitor Profile.....	26
3.3 Travel Behaviour.....	32
3.4 Attractions Visited and Activities.....	40
3.5 Information Sources and Booking.....	43
3.6 Visitor Expenditure.....	47
3.7 Net Promoter Score and Comments Regarding Their Experience in Mount Gambier.....	49
3.8 Other Comments.....	53
3.9 Destination Image.....	55
3.10 Intention to Visit and Driver Analysis.....	57
3.11 Benefit Segments.....	58
4. Survey of Distributors.....	62
4.1 Introduction.....	62
4.2 Awareness of Mount Gambier.....	63
4.3 Likelihood of Recommendation.....	66
4.4 Method of Communication.....	69
4.5 Distribution Partners.....	71

4.6	Opportunities for Product Development.....	72
4.7	Marketing Focus.....	74
5.	Industry Stakeholders.....	76
5.1	Introduction.....	76
5.2	Destination Branding.....	76
5.2.1	Core Attribute.....	76
5.2.2	Other Strengths.....	77
5.2.3	Attitude to the 'Limestone Coast'.....	78
5.3	Rating of Product and Experiences.....	79
5.4	Product Gaps.....	82
5.5	Product Strengths / Opportunities.....	84
5.6.	Public Infrastructure.....	85
5.7	Distribution Channels.....	87
5.8	Linkage with Glenelg Shire.....	87
5.9	Other Issues.....	88
Appendix A	Questionnaires.....	89

Disclaimer:

This report has been prepared by Greenhill Research and Planning on the basis of instructions and event data provided by the City of Mount Gambier and data collection undertaken by Greenhill Research and Planning. While every care has been taken in collecting, analysing and preparing the information presented in this report Greenhill Research and Planning does not provide, warrant or represent that the data is accurate or comprehensive. For further information contact:

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1. Introduction

This report presents the results of a program of market research conducted on behalf of the City of Mount Gambier and Tourism Mount Gambier in March and April 2017.

The objective of the research was to provide a detailed understanding of visitor markets, the needs of visitors and their information usage and booking behaviours to provide a basis for the development and marketing of tourism product for the region.

The main component of the research involved a survey of visitors to the Mount Gambier region which was defined as the City of Mount Gambier and the District Council of Grant.

The visitor survey was designed to provide quantitative data regarding the profile and behaviour of visitors and qualitative data relating to their experience of the Mount Gambier region.

The visitor survey was conducted through accommodation and attractions in Mount Gambier and Port MacDonnell. The survey questionnaire could be completed online and flyers were distributed through accommodation and attractions which included a link to the questionnaire. An incentive consisting of a prize draw for one of four \$500 gift cards was offered to stimulate response. The survey was also conducted on a face to face basis at visitor attractions in the region including the Blue Lake, Lady Nelson Visitor Centre, the Main Corner, Engelbrecht Cave, Umpherston Sinkhole and the Port MacDonnell Visitor centre.

A total of 518 visitor survey responses were achieved over the survey period of March and April 2017 – 404 through face to face interviewing at central locations and 114 online.

The visitor survey represents a snapshot of the market taken at a particular point in time and is not an average over a one year period. A further survey snapshot will be conducted in the peak summer holiday period in December 2017 / January 2018.

Survey results will be subject to both sample error, which is related to the size of the sample, and sample bias, which is related to the structure of the sample or the way in which the data is collected. In conducting surveys in the future which are designed to determine changes when compared to the results presented in this report care should be taken to ensure that the sample structure is consistent over time and that observed changes represent changes in the market rather than changes in the methodology. The issue of sample size is discussed further in Section 3.1.

In addition to the results presented in this report detailed tabulations of the visitor survey data have been provided as separate electronic appendices.

In addition to the visitor survey a survey of distribution agents and inbound tour operators was conducted primarily by telephone with a total 23 interviews achieved from a database provided by the Limestone Coast LGA. Distributors were also able to participate in the survey prize draw.

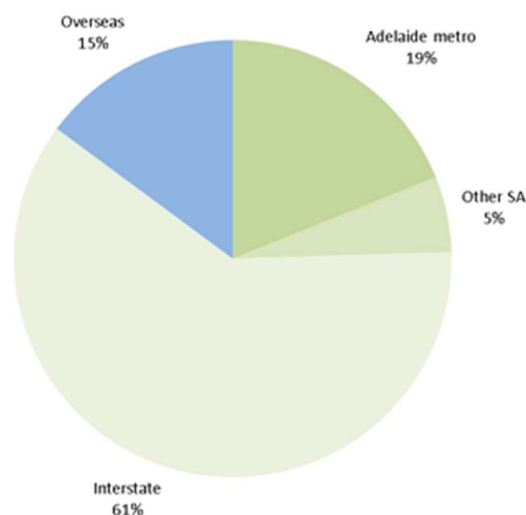
The data collection methodology also included a survey of regional stakeholders with a questionnaire hosted online and industry stakeholders listed on the Tourism Mount Gambier database invited to provide feedback regarding branding, marketing and product development issues. Responses were received from a total of 17 industry stakeholders.

2. Summary

2.1 Visitor Profile

The survey of visitors provided information regarding the profile of visitors to the Mount Gambier region over the period of March and April 2017.

Figure 2.1 Visitor Origin



The survey found that the majority of the respondents were from interstate (61%) followed by Adelaide metropolitan area (19%), overseas (15%) and other South Australia (5%).

The main origin States were Victoria (46% of interstate visitors), NSW (incl. ACT) (29%) and Queensland (16%).

The main origin countries were UK (28% of overseas visitors), Germany (21%), other Europe (20%) and New Zealand (14%).

The regional profile for the Limestone Coast published by Tourism Research Australia (TRA) indicates that the distribution of origin for overnight visitors in 2015 was intrastate – 50%, interstate - 43%, and overseas 7%.¹ While the TRA profile for Mount Gambier does not provide a breakdown of intrastate and interstate, the proportion of international visitors is 11% suggesting that the Mount Gambier region receives a greater proportion of the touring market when compared to the Limestone Coast overall which would also account for the high proportion of interstate visitors.

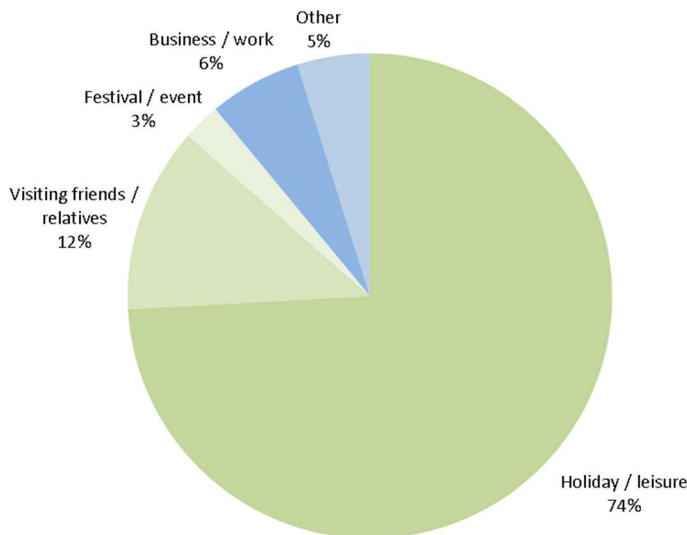
When compared on the basis of survey method the sample collected online primarily through accommodation is a closer match to the TRA benchmark for the region – intrastate 46%, interstate 44% and international 11%.

¹ Tourism Research Australia. Limestone Coast Tourism Profile, 2015. http://www.tra.gov.au/tra/2016/Tourism_Region_Profiles/reports/regional_profiles_2015/Limestone_Coast_Demand_2015.xlsx

The characteristics of the sample reflect the time of year (79% of the interviews were conducted during the March shoulder period) and the survey method (78% conducted face to face at visitor attractions).

The reason for visiting Mount Gambier is described below (Figure 2.2).

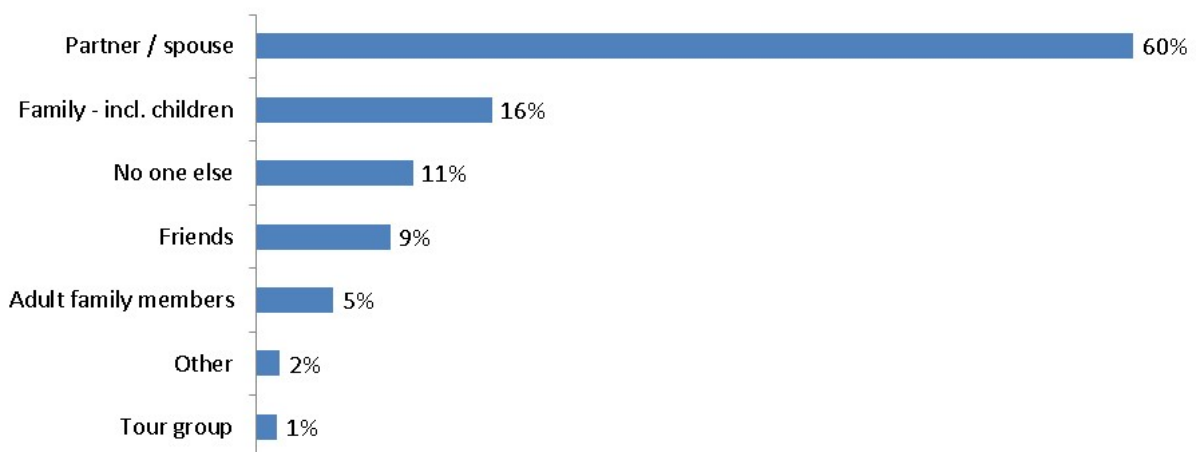
Figure 2.2 Reason for Visit



In the great majority of cases the respondents were visiting the region for holiday / leisure purposes (74%). 60% of Adelaide metro, 41% of other SA, 83% of interstate and 68% of international visitors were travelling for holiday / leisure purposes.

The respondent’s travel party was as follows (Figure 2.3).

Figure 2.3 Travel Party

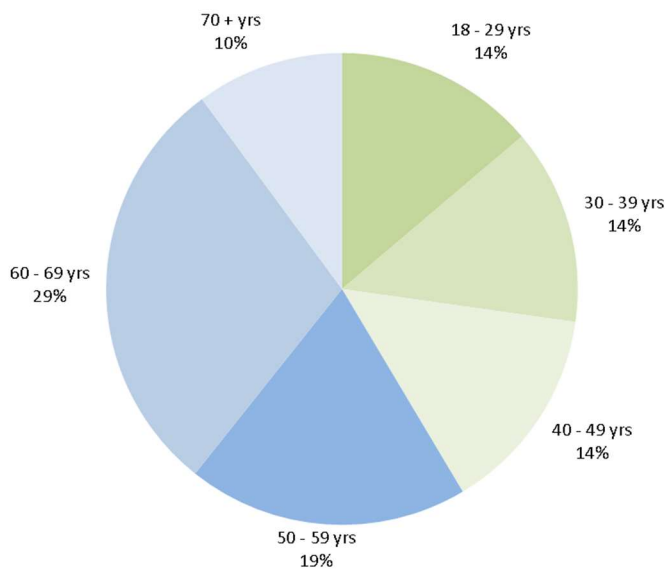


Multiple response – respondents may have provided more than one response.

The great majority of the visitors (60%) were travelling with a spouse or partner. Only a small proportion of those surveyed were travelling with a tour group (1%).

The distribution of age was as follows (Figure 2.4).

Figure 2.4 Age Group

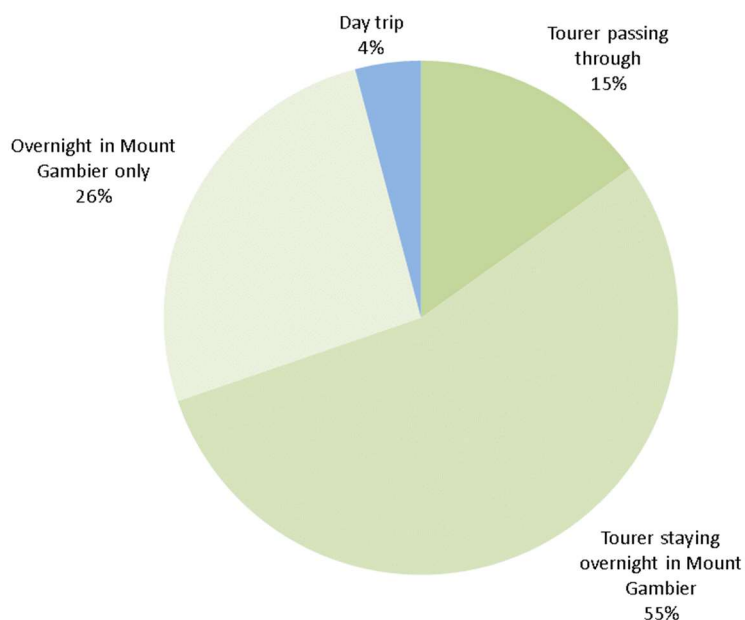


The largest age segment was those aged 60 to 69 with these individuals representing more than one quarter (29%) of the sample.

2.2 Travel Behaviour

The type of trip taken by the visitors is described below (Figure 2.5).

Figure 2.5 Type of Trip



The visitor survey found that 55% of the visitors were staying overnight in Mount Gambier as a component of a longer trip with an overnight stay in at least one other destination; one quarter (26%) were staying overnight in Mount Gambier only and 4% were visiting Mount Gambier as a day trip from home.

There was a further 15% who were passing through Mount Gambier and staying overnight elsewhere as part of their trip – this group consisted of mostly interstate visitors (63%) and international visitors (30%).

This group represents additional visitors to the Mount Gambier region not currently captured by the TRA surveys.

Assuming a base of around 100,000 leisure purpose overnight visitors² the survey suggests a figure of approximately 20,000 additional visitors who pass through Mount Gambier without staying overnight.

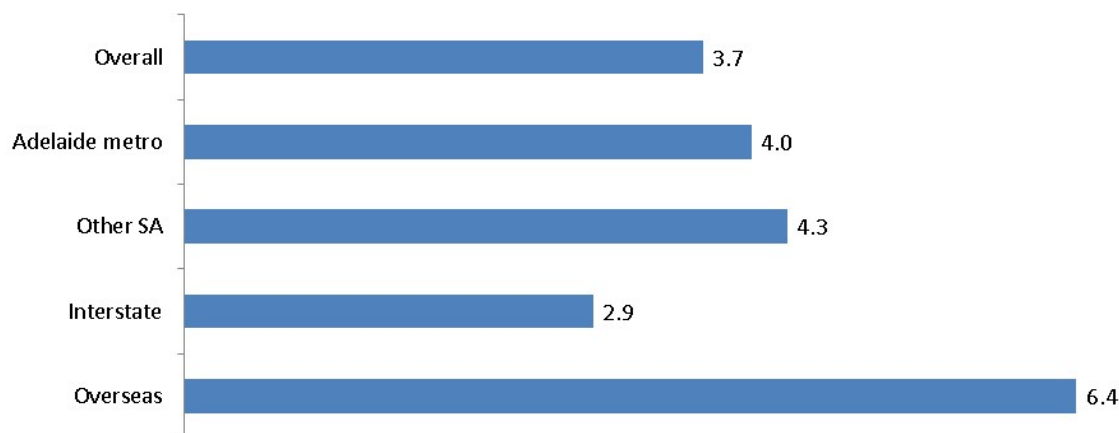
There is an opportunity to capture a greater proportion of the touring market to stay overnight in Mount Gambier.

For this group the overnight stop overs most commonly cited either before or after their stay in Mount Gambier were:

- Robe
- Port Fairy
- Portland
- Millicent
- Kingston
- Beachport
- Adelaide.

The average length of stay in Mount Gambier is described below (Figure 2.6).

Figure 2.6 Average Length of Stay in Mount Gambier



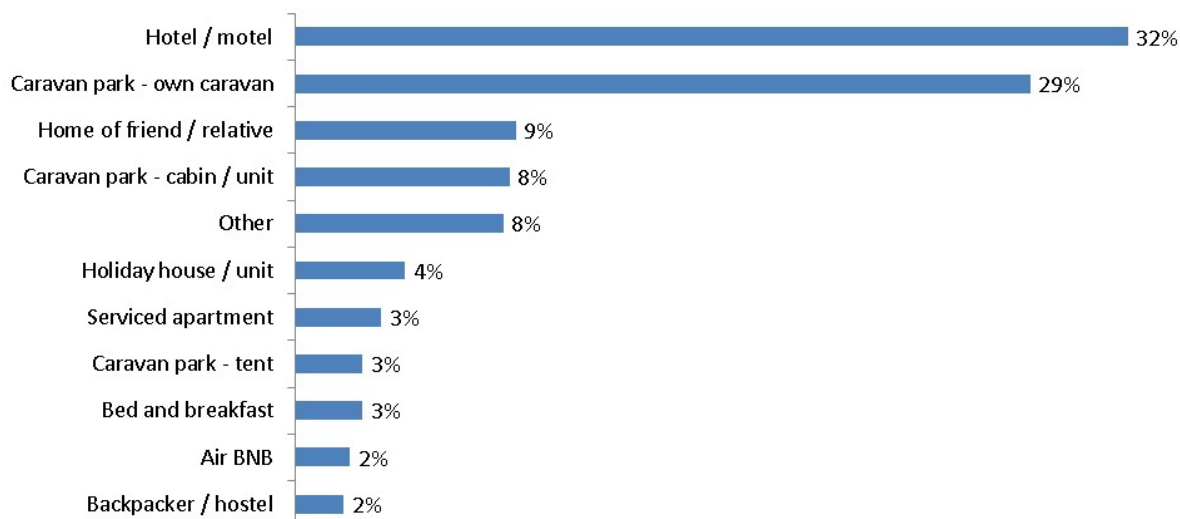
Sample base – Stayed overnight in Mount Gambier.

² Tourism Research Australia. Local Government Area Profiles, 2015. Mount Gambier (C). Note the Mount Gambier profile does not include DC Grant which was in-scope for the research. The TRA figures do not include persons staying overnight in Port MacDonnell or elsewhere in the DC Grant region. Proportion of holiday purpose visitors derived from the Limestone Coast Visitor Profile, 2015 published by the SA Tourism Commission.

The average length of stay in Mount Gambier was 3.7 nights. The length of stay ranged from 2.9 nights for interstate visitors to 6.4 nights for those from overseas. International visitors include persons on working holiday visas who may stay for extended periods in the region.

The type of accommodation used by those staying overnight in Mount Gambier is described below (Figure 2.7).

Figure 2.7 Accommodation Used



Sample base – Stayed overnight in Mount Gambier.

Multiple response – Respondents may have stayed in more than one type of accommodation.

Overnight visitors were most likely to stay in hotel / motel accommodation (32%), followed by their own caravan in a caravan park (29%). Other accommodation in most cases consisted of a motorhome or self-contained vehicle which could be parked on the side of the road and other places designed to service these vehicles. The Mount Gambier showgrounds was mentioned in a number of instances.

The visitors’ method of travel to Mount Gambier is described below (Figure 2.8).

Figure 2.8 Mode of Travel

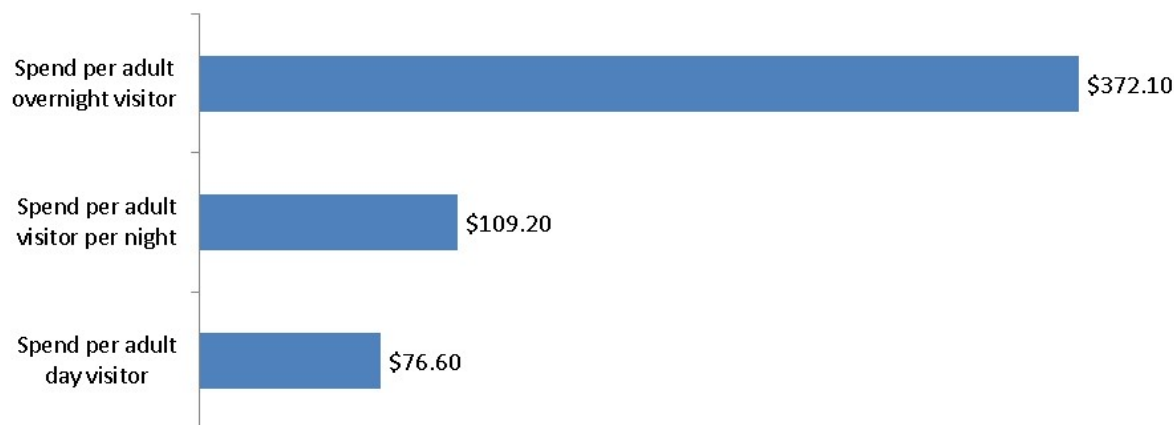


Multiple response

The visitors were most commonly travelling by private vehicle (82%) or a rented vehicle (12%). Almost one half (48%) of the respondents had travelled, or intended to travel, on the Great Ocean Road.

The average expenditure by visitors in Mount Gambier was as follows (Figure 2.9).

Figure 2.9 Average Expenditure in Mount Gambier

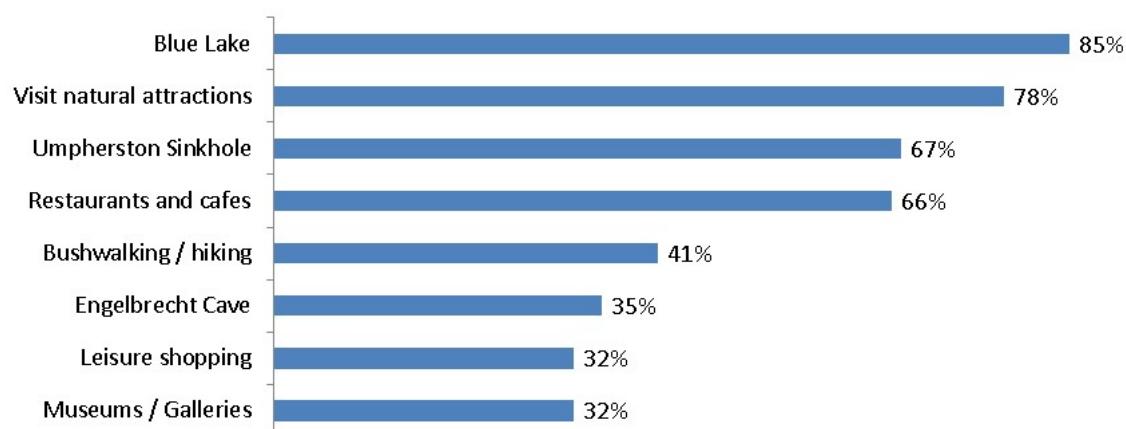


The average expenditure in Mount Gambier per adult overnight visitor was \$372.10 over the duration of their stay in Mount Gambier. For those staying overnight the average spend per adult visitor per night was \$109.20 while the spend per adult day visitor was \$76.60³.

2.3 Visitor Attractions and Activities

The attractions and activities of greatest interest to the visitors were as follows⁴ (Figure 2.10).

Figure 2.10 Visitor Attractions and Activities



Multiple response

³ The 2015 Mount Gambier tourism profile published by Tourism Research Australia provides expenditure estimates of \$352 per domestic overnight visitor (\$146 per night) and \$295 for international overnight visitors (\$70 per night). Tourism Research Australia. Local Government Area Profiles, 2015. Mount Gambier (C), South Australia.

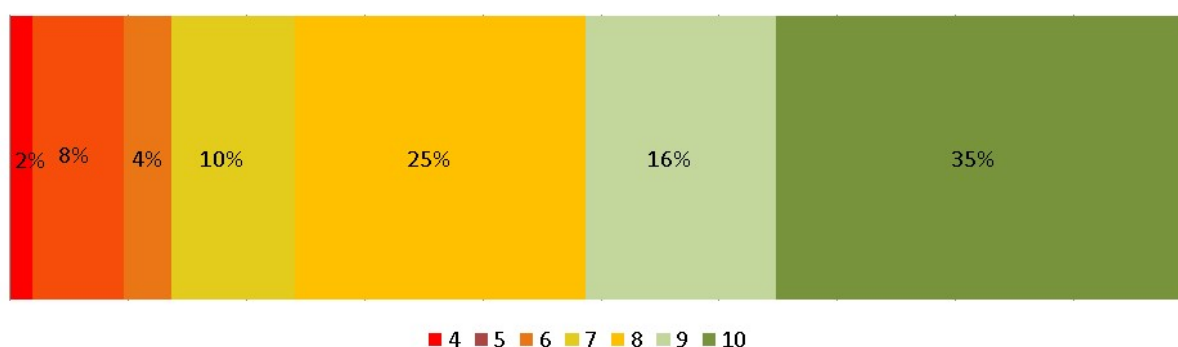
⁴ See Section 3.4 for further detail.

The most popular attractions for visitors were the Blue Lake (85%) and the Umpherston Sinkhole (67%) while the most common activities in the region were visiting natural attractions (78%), restaurants and cafes (66%) followed by bushwalking / hiking (41%), leisure shopping (32%) and museums / galleries (32%).

2.4 Likelihood of Recommendation and Visitor Experience

The respondents surveyed at the visitor attractions were asked to rate the likelihood that they would recommend Mount Gambier as a travel destination to friends, relatives or colleagues (Figure 2.11).

Figure 2.11 Likelihood of Recommendation



The majority of the visitors provided a likelihood of recommendation rating of nine (16%) or ten (35%). The Net Promoter Score⁵ was 138 overall. A score of between 100 and 150 is considered to be good while a score of more than 150 is excellent.

Comments provided in regard to their ratings suggested that visitors felt that the natural attractions and the unique geology the main attributes that visitors enjoyed about Mount Gambier.

A number of visitors commented that they had not been aware of how much there was to see and do in Mount Gambier.

Highlights of their experience were:

- Accommodation – The Barn, Blue Lake Caravan Park
- Cave diving / Ewens Ponds / Piccaninnie Ponds
- Clean, green environment and gardens of Mount Gambier
- Crater Lakes and caves
- Free bike hire
- Geology / volcanic history
- History / heritage of the area / Aboriginal culture
- Natural attractions
- Value for money.

⁵ The Net Promoter Score is calculated as the proportion of Promoters (score of 9 or 10) minus the proportion of Detractors (score of 0 to 6) added to a base of 100.

2.5 Information Sources and Booking Behaviour

The main sources of information were as follows (Figure 2.12).

Figure 2.12 Information Sources⁶



While visitor information centres were frequently cited due to the large numbers of tourers in the sample the type of information most commonly accessed was digital in nature. This included 'other web sites' (27%), 'testimonial websites' e.g. TripAdvisor (11%), 'government websites' e.g. southaustralia.com (8%), 'online travel agents' e.g. Expedia, Wotif (8%), 'social media' e.g. Facebook, Twitter, Instagram (7%) and 'apps for smartphones and tablets' (5%).

The net proportion accessing information from a digital source – the proportion accessing one or more digital sources – was 41% while the aggregate figure across all platforms was 66% demonstrating the breadth of digital sources used by visitors.

While not large, a number of respondents mentioned WikiParks Australia as a source for both information and booking.

Almost half (46%) of the visitors surveyed stated that they had booked some component of their visit to Mount Gambier with accommodation the type of product most frequently booked (94%).

The booking mechanism was most commonly an online travel agent / portal (52%) or direct with the product (32%). A retail travel agent was cited by 8% of respondents where they had booked product.

⁶ The net figure refers to the proportion of respondents specifying one or more of these types of information sources.

2.6 Visitor Motivation

The online survey respondents were presented with a range of benefits that visitors may be interested in when considering a holiday and were asked to rate their level of interest in each on a scale of 1 to 4 with 4 – ‘very important’.

The respondents were then classified on the basis of their response patterns using a data reduction technique. This process identified 3 roughly equal segments labelled as Discoverers, Indulgers and Activity Seekers.

Discoverers (34%)

The Discoverer market consists of those with an interest in exploration, nature & the natural environment, history & heritage, local culture & people, museums and galleries.

This group is motivated by intellectual stimulation and learning. The profile is characteristic of the touring market. They are older, more likely to travel with their own caravan.

They will be attracted by natural attractions particularly where there is something unique and special. The history and heritage is a feature and interpretation is important.

They are more likely to access information from printed sources including a visitor guide and also from a visitor information centre.

The travel agents and other distributors surveyed for the study identified the independent, self-drive touring market as the major opportunity for the region.

Indulgers (30%)

The Indulger market is interested in relaxation, reflection, time out with partner and food and wine. This segment includes higher yielding travellers interested in luxury accommodation.

To appeal to the Indulger market it may be appropriate to incorporate nearby cellar door experiences perhaps linking with the Coonawarra to some extent. Mount Gambier should provide the accommodation base and the product offering should include fine dining options – in particular The Barn which was highly regarded by survey respondents – and specialist accommodation.

Content should be developed for this market which can be distributed through digital platforms and hard copy publications where relevant.

Activity Seekers (37%)

The activity seeker group includes those with an interest in adventure, excitement and challenge. It also includes those with an interest in a specific activity such as cave diving and also families where things to do are important to keep children entertained.

It is therefore somewhat mixed and will include backpackers with a focus on exciting activities to do as well as families.

It was interesting to note that while based on very small samples those respondents participating in specific water based activities were the most likely to indicate that they would revisit Mount Gambier again in the future.

Promotional material prepared for this market should include interesting and spectacular activities such as cave diving, walking and hiking trails, 4WD touring, surfing and water based activities. While cave diving is a specialist activity, visitors can snorkel at Ewens Ponds without specialist training and experience the limestone caves opening up beneath them. Where visitors are interested in travelling for specific activities such as cave diving or surfing there are specialist publications that can be used to reach them.

Facebook advertising also offers a cost effective method of target consumers on the basis of specific interests.

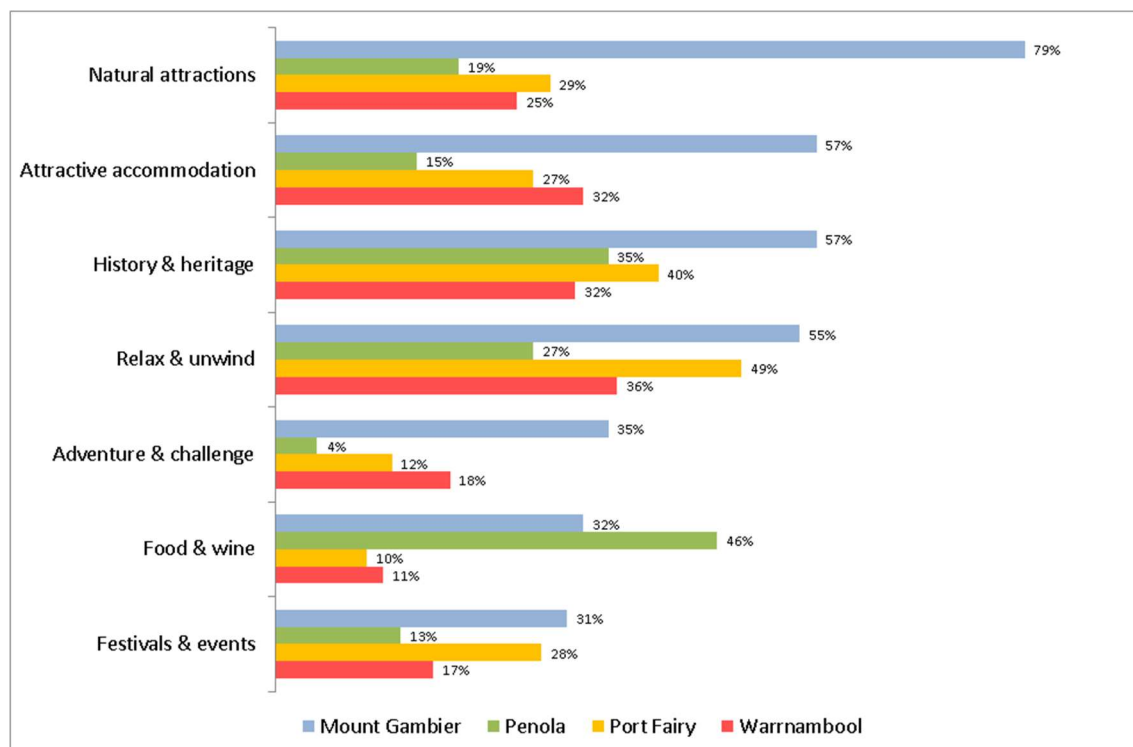
While there were very few visitors who mentioned golf as an activity the Mount Gambier Golf Club and the Blue Lake Golf Club could link with courses in western Victoria such as Dunkeld and Horsham to package golfing holidays.

Mass participatory cycling events are also becoming more popular. Bicycle SA promotes various events through regional South Australia.

2.7 Destination Image and Place Branding

The visitors that completed the online survey were asked to rate their image of Mount Gambier on the basis of a set of destination attributes. They were also asked to specify their associations with three other places in the region: Port Fairy, Penola and Warrnambool (Figure 2.13).

Figure 2.13 Destination Image



On the basis of the responses from the visitors the strongest association is the natural attractions.

While many visitors know of the Blue Lake comments suggested that they were not necessarily aware of the geological history of the region including the volcanoes and the caves. For many the Umpherston Sinkhole was a particular highlight.

The key point of difference for the region, particularly for the touring market or Discoverer segment is the unique geology of the region and the ‘Blue Lake’ positioning should be broadened to communicate this.

In the future the destination brand could be strengthened through the development of the Blue Lake and Valley Lake area. This might include further interpretation, a café and interpretive centre that looks out over the Blue Lake, improved walking trails and linkage through the area and maps at viewing sites.

Some visitors were not aware of walking options such as the Blue Lake circuit.

In the comments provided by the survey respondents it was also clear that destination choice is determined by both aspirational and hygiene factors. The experiences offered by

the destination will provide the 'pull' factors however for many visitors the place where they stay overnight should offer a range of hygiene factors such as: range of quality accommodation; range of shopping; level of safety / security. Survey respondents spoke about being impressed by the size, cleanliness, greenness, and the pride that residents displayed in their city which was an attractive factor in encouraging them to base themselves in Mount Gambier while visiting other attractions in the region.

2.8 Survey of Distributors

A survey of distributors was conducted by phone from a list provided by the Limestone Coast Local Government Association. A total of 23 interviews were achieved with distributors in Australia and overseas; 13 Australian based, 1 Australian based but representing a Chinese company, 4 UK based, 3 based in China and 2 based elsewhere.

The distributors displayed low levels of awareness of Mount Gambier with 43% stating that their awareness was limited or none. Only one fifth (22%) described their awareness as good or excellent.

They generally perceived the natural attributes to be the main attraction with the main market being the independent self-drive traveller.

Chinese distributors suggested food, wine and nature are attractive attributes. The Blue Lake is a distinctive asset.

Weaknesses for the region identified by distributors were:

- Accessibility – distance from major gateways.
- Bookable product.
- Lack of accommodation brand names.
- There are now more accommodation options on Great Ocean Road and Fleurieu Peninsula.
- For Chinese the destination needs to be regarded as special / more iconic.
- May not be able to cater for larger tour groups.

The distributors were generally less likely to recommend Mount Gambier as a travel destination. None of the respondents indicated a likelihood rating of 9 or 10 out of 10. The Net Promoter Score was – 78%.

The circumstances in which they might recommend Mount Gambier were:

- Where driving Melbourne Adelaide / Great Ocean Road.
- If client is interested in wine.
- For frequent travellers looking for something new.

Methods for improving the respondent's knowledge of the region were as follows:

- Attend ATE / trade shows.
- Develop internationally ready product.
- Develop a unique positioning.
- Packaging for high end.
- Develop product suitable for short quick tours (Chinese).
- Trade famils.
- Trade newsletter.

Opportunities for product development were:

- Farm stays
- Mount Gambier as accommodation base for trips around the region – Glenelg River, Coonawarra, Beachport. Dummy itineraries for day trip choices.
- Linking with Great Ocean Road.
- Self-drive food and wine packages.

Marketing opportunities suggested by the respondents were:

- Group tours by bus for Asian markets.
- Getaway package with major airline (with connector flights)
- Self-drivers – Grey nomads, UK and Europe, wine and food.
- Scoopon.

2.9 Survey of Industry Stakeholders

A survey of industry stakeholders was conducted. A questionnaire was setup online and an invitation issued to those listed on the Tourism Mount Gambier database to complete the questionnaire. A total of 17 responses were received – 10 from accommodation operators, 2 from attractions, 2 from restaurants / cafes and 3 others which were car rental /accommodation; hotel with restaurant & B&B accommodation; accommodation with functions and events.

Due to the relatively small number of respondents the feedback represents qualitative information regarding the views of stakeholders and may not be representative of the broader industry. The lack of response may be due to some degree to the lack of an industry body in recent years leading to a loss of momentum and a lack of cohesion within the industry.

The key attribute that distinguishes the region was generally felt to be the crater lakes, caves, unique geology and volcanic history.

For the domestic market wine and food were also important distinguishing attributes.

For Chinese – access to seafood. Catching tuna at Port MacDonnell.

Other strengths were:

- Canunda national park (for 4WD)
- Cave tours
- Diving
- Fishing
- Mount Schank
- Wine.

The stakeholders were asked whether they favoured the retention of the Limestone Coast branding in any form. The results were mixed with almost two thirds favouring retention of the name in some form.

Comments in favour of retaining the brand related to the equity that currently exists with the brand, the cost of changing, aligning with State marketing.

Where not in favour comments suggested that Limestone Coast is not appropriate for Mount Gambier as it's not on the coast and the name is too broad for a regional destination.

When asked to rate the tourism product in the region the attractions were most positively rated with 56% rating them as 'Very good' and 39% as 'good'.

Half of the respondents (50%) rated accommodation as 'average' while 50% rated accommodation as 'good' or 'very good'.

Only one fifth (22%) rated hire services as 'good' or 'very good' while most respondents rated tour or transport operators as 'poor' (39%) or 'average' (44%).

There were comments suggesting that Mount Gambier requires central conference / convention facility.

It was also suggested that tour services are non-existent or of poor quality.

The stakeholders were also asked to comment on the experiences on offer in the Mount Gambier area. Nature based experiences were most positively rated (89% 'good' or 'very good') followed by food and wine (78% 'good' or 'very good'), adventure activity and sport (66% 'good' or 'very good') and heritage and culture (56% 'good' or 'very good').

For food and wine experiences it was suggested that there was potential to expand on farm based produce. Opening hours of local restaurants was identified however as an issue.

Issues affecting the development and promotion of tourism included the following:

Product gaps

- 4 and 5 star accommodation
- Adventure / activity based tourism
- Commissionable product
- Conference facilities
- Tourism retail
- Tour operators.

Opportunities

- Aboriginal history
- Development of a Crater Lake precinct – new café, walking trails, boating.
- Little Blue Lake, Mount Schank
- Valley Lake.

Public infrastructure

Comments regarding public infrastructure included the following:

- Airport capacity – improve capacity to accept 100 plus seats.
- Blue Lake café – redevelop so it looks over the lake.
- Develop facilities for swimming, boating on the Valley lake and Little Blue Lakes.
- Tourism signage is poor.
- A new visitor centre in the centre of the city.

Distribution

Linkage with the Great Ocean Road and the Grampians will help to link Mount Gambier with compatible stop overs for the touring market.

A destination web site will be an important mechanism for distribution of tourism product in Mount Gambier.

2.10 Conclusions and Recommendations

Branding and Positioning

While the Blue Lake is the iconic natural feature that will provide the focus for destination branding it is recommended that the positioning of Mount Gambier is broadened to reflect the volcanic history of the region and to also include the hygiene factors that will encourage the touring market to stop over.

The industry stakeholders were asked their opinion of the Limestone Coast positioning. While there was a degree of support for this brand based on the equity that has been built up over time there are number of issues relating to the use of this brand for Mount Gambier relating to the size and diversity of the Limestone Coast region and the coastal association.

It is recommended that a destination brand is developed for the Mount Gambier area that relates specifically to the geographic region of the City of Mount Gambier and the surrounding area and the unique attributes of the region – in particular the Blue Lake, caves and volcanic formations.

Chinese Visitors

While a mandarin language questionnaire was provided to accommodation operators the research did not identify any Chinese visitors.

The Chinese inbound market generally has little time and does not disperse greatly from the major cities.

It was also the case however that the research was conducted in a period that did not coincide with the main holiday periods in China (Chinese New Year January - February and the Golden Week in October).

Chinese visitors are interested in iconic and aspirational experiences. The continuing development of the Crater Lakes as a special and unique natural attraction should increase the appeal of the region for this market. A destination can quickly become fashionable through sharing by social media and the internet – the case of Sea Lake being a good example.

It is also known that Chinese are interested in fishing and Port MacDonnell is attractive for some. Wineries and aspirational 'good living' may also be attractive.

Tourism Research Australia has conducted a study of free and independent travellers to South Australia from China⁷. The research found that South Australia was appealing for its:

- Clean air
- Nature / wildlife
- Opportunities to explore and be adventurous.

⁷ Tourism Research Australia, 2017. Chinese Free and Independent Travellers to South Australia.

The most commonly used websites for research and booking by independent Chinese travellers are Ctrip.com; Qunar.com; Google.com; Booking.com.

It is likely that government to government trade links between regional areas and Chinese provinces will also assist by raising awareness and developing tourism opportunities. See the Onkaparinga case study in the LGA of SA's publication Events Guide for Local Government and Tourism Background Paper.

Communication

While digital channels have become more important as a source of information for travellers the survey demonstrated that printed resources continue to play an important role, particularly for the touring market and older travellers.

Digital platforms however represent the most commonly cited sources of information and it is recommended that a digital communication strategy should be adopted as the primary marketing tool for the region.

Distribution

An important component of the distribution strategy for tourism regions is the establishment of a web portal that represents the region independently and provides a focus for promotion and distribution of tourism product – e.g. www.barossa.com.

The lack of a consolidated portal results in the fragmentation of online distribution to the detriment of the industry and the region as a whole. The regional portal may also represent a revenue stream for the industry association where product is commissionable.

The website should provide information which is segmented on the basis of the needs of the three motivational profiles – Discovery, Indulgence and Activity (possible split into Adventure & Family).

It is recommended that an independent web portal is established for the region. Operators should be encouraged to enable the portal as a booking channel through which Mount Gambier Tourism can receive commission.

The survey of distributors indicated that distributors had low levels of awareness of Mount Gambier as a tourism region and were unlikely to recommend the area to clients.

It is recommended that Tourism Mount Gambier allocates additional resources to raise awareness of the region by the Australian Tourism Exchange (ATE) and other relevant trade shows, communicating a unique positioning, hosting famils and disseminating further information for the region through an e-newsletter and other mechanisms.

It is further recommended that Tourism Mount Gambier works with product in the area to improve capacity to service international markets and to supply commissionable product that can be included within wholesale programs.

Festivals and events

It is recommended that events with the potential to attract visitors to the region are prioritised, supported where possible and communicated to potential visitors through marketing collateral and digital resources. In particular, an up to date 'what's on' listing should be a prominent feature of the internet portal for the region.

The James Morrison Academy and the Generations in Jazz competition represent a significant opportunity to establish a music / cultural positioning for the region.

Product Development

It is recommended that consideration is given to the further development of crater lakes area to create a 'must see' experience for the touring markets. At minimum this will include improved signage and interpretation and development of walking trails.

If funding is available a new café could be considered overlooking the lake and including interpretation of the volcanic history of the region. Further development of water based activities could also be considered on the Valley Lake and Little Blue Lake.

The lack of tour operators was identified by industry stakeholders as a weakness and it is recommended that the development of multiday tour itineraries is encouraged.

Some visitors also suggested an interest in day tours around Mount Gambier. This could initially involve volunteers who are able to take visitors with an interest in discovery on a walking tour around the city to points of historical interest. This could be coordinated through the visitor centre.

Wine tours may also be attractive to the Indulger market while tours that service the passengers arriving on cruise boats in Portland are also an opportunity.

Segmentation and Targeting

The survey identified three segments on the basis of benefits sought. It is recommended that marketing strategy and product development activities are planned to address the needs of these key visitor segments.

The **Discoverer** segment is characteristic of the touring market and benefits sought relate to discovery and learning.

With the aging of the population and the retirement of the baby boomer generation this market will continue to grow.

Branded drive routes provide a mechanism that assist tourers to make decisions about their itinerary and may provide gateways for product distribution. The Sealink Travel Group has in the past developed an Adelaide to Melbourne drive program although it is not known if this is still promoted by the company.

The Great Ocean Road is an aspirational experience for many tourers and linkage with this route where possible should be a priority. The proposed Green Triangle Tourism Action Plan may provide a mechanism for improved linkage.

It is recommended that branding for the region presents the crater lakes and volcanic formations as the key benefit for this market. This should be supported by interpretation and linkage of significant attractions through drive and walking trails. Heritage is also of interest.

The **Indulger** market consists of persons with an interest in 'good living' - relaxation, spending time with partner and food and wine.

It is recommended that a strategy is developed to service this market which includes luxury accommodation, fine dining and premium cellar door experiences including the Coonawarra. There may be opportunities for day tour operators to service this market.

The **Activity Seeker** market is interested in participating in particular activities. It includes backpackers with a focus on adventure and also families looking for things to do with children.

It is recommended that the Activity Seeker market is targeted through focusing on the particular activities of interest – in particular cave diving and water based activities - and for families the recreational activities offered by the crater lakes precinct and caves.

Travel behaviour

The survey identified a significant number of visitors from interstate and overseas who were not staying overnight in Mount Gambier.

It is recommended that communication developed for the touring market emphasises the benefits of staying overnight in Mount Gambier including hygiene factors such as range of accommodation, shopping, services etc.

Visitors in some instances were travelling through to places that offer free camping. Policies that support visitors travelling in campervans and self-contained vehicles to stop overnight may encourage overnight stays. The Campervan and Motorhome Club of Australia runs an 'RV Friendly Town' program and promotes registered towns to its members. An RV friendly town is defined by the following criteria:

Essential Criteria

- Provision of appropriate parking within the town centre, with access to a general shopping area for groceries and fresh produce.
- Provision of short term, low cost overnight parking (24/48 hours) for self-contained recreational vehicles, as close as possible to the CBD.
- Access to potable water.
- Access to a free dump point at an appropriate location.

Desirable Criteria

- Provision of long term parking for self-contained recreational vehicles.
- Access to medical facilities or an appropriate emergency service.
- Access to a pharmacy or a procedure to obtain pharmaceutical products.
- Visitor Information Centre (VIC) with appropriate parking facilities.
- VIC to provide a town map showing essential facilities, such as short and long term parking areas, dump point and potable water.
- RV Friendly Town™ signs to be erected within the town precinct.

3. Visitor Survey

3.1 Introduction

The visitor survey was conducted online with visitors completing a web hosted questionnaire and on a face to face basis at visitor attractions by survey interviewers with a total sample of 518 responses achieved.

The online sample was recruited through the distribution of flyers for the survey through accommodation, attractions, visitor information centres and transport hubs. The face to face interviews were conducted at attractions and visitor information centres.

The distribution of the sample on the basis of the basis of survey method and time period is described below (Table 3.1).

Table 3.1 Sample by Data Collection Method and Month

	March	April	Total
Central location	295	109	404
Online	114		114
Total sample	409	109	518

The sample represents both non-school holiday (March) and school holiday periods (April)⁸. Initially the plan was to conduct all of the data collection in March and the close off date for the online component was the 3rd of April. As the online component was associated with an advertised prize draw the survey could not be extended.

The survey represents a 'snapshot' of the market taken at a particular time of the year and is not therefore an average over the full year. It is likely that surveys taken at other time of the year such as the winter low period and the summer high period will show differing sample characteristics to the current survey.

The sample for a point in time 'snapshot' survey should be large enough to capture different segments of the market such as interstate and overseas visitors and should be structured so that there are no significant gaps. It should therefore represent both school holiday and non-school holiday periods and should also allow those who are not staying in commercial accommodation or travelling through the region to be represented.

The sampling process adopted for the survey allows for a broad coverage of visitor markets on the basis of time of year and type of visitor.

⁸ The dates for school holidays vary between States and Territories. Victorian school holidays occurred in the first half of the month while school holidays in South Australia were in the second half of April.

As previously stated the size of the sample should provide confidence that the visitor markets are adequately represented. The size of the sample will however also determine the precision of the survey estimates. A sample of the population is always subject to a degree of random error as a measure of an underlying population parameter.

The reliability of a simple random sample of 500 responses is compared below with the reliability for samples of 100 and 300 (Table 3.2).

Table 3.2 Sample Reliability – 95% confidence interval

Population proportion	Sample size		
	100	300	500
90%	84.1% to 95.9%	86.6% to 93.4%	87.4% to 92.6%
70%	61.0% to 79.0%	64.8% to 75.2%	66.0% to 74.0%
50%	40.2% to 59.8%	44.3% to 55.7%	45.6% to 54.4%
30%	21.0% to 39.0%	24.8% to 35.2%	26.0% to 34.0%
10%	4.1% to 15.9%	6.6% to 13.4%	7.4% to 12.6%

For example, if using a sample to estimate the proportion of males within the population where the true figure is 50% it would be expected that in 95% of cases a sample of 100 will provide an estimate of somewhere between 40% and 60% i.e. within a range of 20 percentage points.

However, if a sample of 500 is taken the estimate in 95% of cases is expected to be between 46% and 54% - a much narrower range – making the estimate more precise.

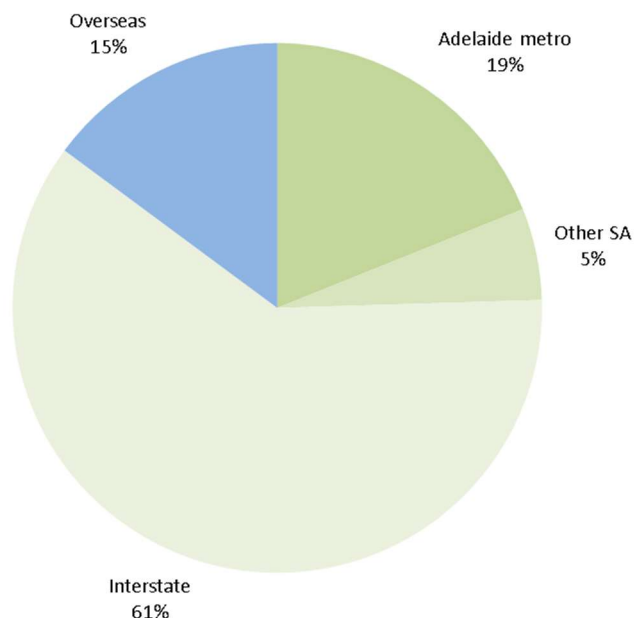
It is also the case that as the population proportion approaches zero or 100% the precision will also increase. If say, 10% of the population use a travel agent to make travel bookings then the sample estimate for a sample of 500 will be between 7% and 13%.

Tables presented in the body of this report are in most cases broken down by the origin of the respondent. The survey results presented in the first column of the table will represent the total sample and the results in the subsequent columns represent the samples for each of the main origin groups – Adelaide metropolitan, other South Australia, other Australian State and overseas. The percentages within each column are calculated on the sample base specified at the base of each column.

3.2 Visitor Profile

The origin of the visitors is described below (Figure 3.1).

Figure 3.1 Visitor Origin



The majority of the visitors were interstate residents (61%). South Australian residents provided one quarter of the sample (24%) while overseas visitors made up 15%.

When compared on the basis of profile the visitors from Adelaide were more likely to be:

- Travelling for work (15% - index 248)⁹
- Staying overnight in Mount Gambier (93% - index 115)
- Visiting Mount Gambier only (74% - index 244)
- Staying in a hotel / motel (35% - index 132)
- Staying in a cabin / unit in a caravan park (14% - index 211)
- Staying in a holiday house / unit (8% - index 235)
- Travelling as a family with children (23% - index 146)
- More likely to cite friends / relatives in Mount Gambier as an information source (20% - index 192)
- Aged less than 50 years (60% - index 144).

Visitors from other parts of South Australia were more likely to be:

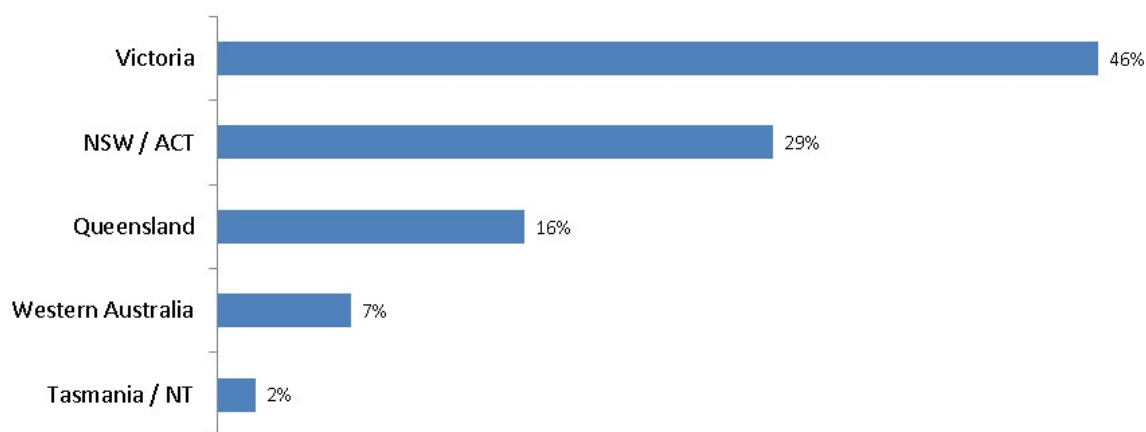
- Visiting for a festival or event (14% - index 550)
- Visiting friends or relatives (28% - index 223)
- Visiting on a day trip (i.e. not staying away from home overnight) (14% - index 397)

⁹ The index is a method of comparing the result for the specified segment with the sample as a whole. It is calculated by dividing the segment percentage by the total percentage. For example, if the travelling for work index for males was 150 this indicates that males are 50% more likely to be travelling for work when compared to the sample overall.

- Staying in a cabin / unit in a caravan park (17% - index 209).
- Visiting Mount Gambier only (55% - index 182)
- Taking a short tour of 1 to 7 nights (24% - index 173)
- Leisure shopping (55% - index 171)
- Cite relatives / friends in Mount Gambier as an information source (28% - index 260)
- Aged 40 to 49 years (21% - index 146).

The distribution of origin state / territory is described below (Figure 3.2).

Figure 3.2 Origin State



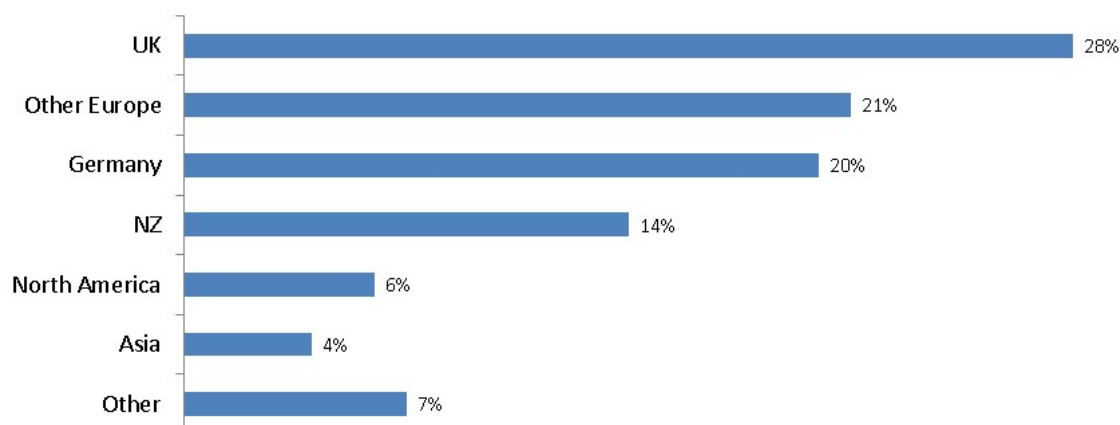
Sample base – Interstate visitors.

When compared on the basis of profile interstate visitors were more likely to:

- Be aged 60 or more years (46% - index 116) and less likely to be aged 18 – 29 years (9% - index 65).
- Be staying in a caravan park in their own caravan (38% of overnight visitors – index 131).
- Be travelling between 1 and 14 nights (33% - index 120).
- Be interested in natural attractions (84% - index 107) and museums / galleries (37% - index 116) and wineries / cellar doors (17% - index 114).
- To obtain information from a visitor information centre (50% - index 114) and a travel book, guide, brochure (27% - index 115).

Origin countries were (Figure 3.3).

Figure 3.3 Country of Origin



Sample base – International visitors.

International visitors were primarily from the United Kingdom (28%), Germany (20%) or other parts of Europe (21%). There were very few visitors from Asia (4%) and these were from India, Sri Lanka and Malaysia rather than north Asia¹⁰.

When compared on the basis of profile the international visitors were more likely to be:

- Be passing through Mount Gambier and not staying overnight (31% - index 202).
- Be using other type of accommodation (13% - index 163) which in most cases was a campervan or self-contained vehicle.
- Travelled on the Great Ocean Road (75% - index 172).
- Be travelling for more than 30 nights (60% - index 220).
- Enjoy bushwalking / hiking (60% - index 135) and beach activities (34% - index 176).
- Be aged 18 – 29 years (26% - index 191).

¹⁰ As previously noted the main holiday periods in China are the Spring Festival (January / February) and the Golden Week (October) and the survey was not conducted during these periods.

The reason for visiting Mount Gambier is described below (Table 3.3).

Table 3.3 Reason for Visit

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Holiday / leisure	74%	60%	41%	83%	68%
Visiting friends / relatives	12%	18%	28%	8%	16%
Festival / event	3%	1%	14%	3%	0%
Business / work	6%	15%	7%	4%	5%
Other	5%	5%	10%	3%	12%
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

In the great majority of cases the respondents were visiting the region for holiday / leisure purposes (74%). Sixty (60%) of Adelaide metro, 41% of other SA, 83% of interstate and 68% of international visitors were travelling for holiday / leisure purposes.

Those from metropolitan Adelaide were more likely to be travelling for business (15%) while those from other parts of South Australia were more likely to be travelling to visit friends and relatives (28%).

Those visiting Mount Gambier only were less likely to be travelling for holiday / leisure purposes (50%) and more likely to be travelling to visit friends / relatives (22%), for business / work (16%) and for a festival or event (6%).

Those aged 60 or more years were more likely to be leisure visitors (80%).

The respondent's travel party was as follows (Table 3.4).

Table 3.4 Travel Party

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Partner / spouse	60%	45%	62%	64%	61%
Family - incl. children	16%	23%	7%	16%	9%
No one else	11%	17%	14%	8%	12%
Friends	9%	7%	7%	9%	13%
Adult family members	5%	5%	7%	4%	8%
Tour group	1%	2%	3%	1%	0%
Other	2%	4%	7%	1%	0%
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

The great majority of the visitors (60%) were travelling with a spouse or partner. Those interviewed during the April school holiday period were more likely to be travelling with children (39%) as were those who were visiting Mount Gambier only (24%), and those from the Adelaide metropolitan area (23%).

Some visitors were travelling with large groups which included two Probus groups and a group of 48 travelling for business purposes.

The distribution of age was as follows (Table 3.5).

Table 3.5 Age Group

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
18 - 29 years	14%	21%	10%	9%	26%
30 - 39 years	13%	20%	10%	12%	13%
40 - 49 years	14%	20%	21%	14%	5%
50 - 59 years	19%	18%	17%	20%	21%
60 - 69 years	29%	14%	34%	34%	25%
70 + years	10%	8%	7%	11%	9%
Sample	514	97	29	312	76
	100%	100%	100%	100%	100%

The largest age segment was those aged 60 to 69 with these individuals representing more than one quarter (29%) of the sample.

When compared on the basis of origin one third (34%) of those from interstate were aged between 60 and 69 while one quarter (26%) of the international visitors were aged between 18 and 29 years.

Those interviewed during the April school holiday period were more likely to be aged between 18 and 39 years (45% cf. 23% of those interviewed in March).

Those visiting Mount Gambier only were more likely to be aged between 30 and 49 years (44% cf. 27% overall).

Trip duration was also related to age with those on a longer trip with multiple stopovers tending to be older.

The majority of those interviewed were female (61%)¹¹. The distribution of gender for those who stayed overnight in Mount Gambier was closer to the general population with 57% female and 43% male.

¹¹ While there is a higher proportion of females this reflects a general bias that females are more likely to respond to surveys rather than a skew to female travellers within the visitor population.

3.3 Travel Behaviour

The survey respondents were asked questions about their itinerary including whether they were staying overnight in Mount Gambier and whether they had stayed, or were intending to stay, in other places as part of their trip (Table 3.6).

Table 3.6 Type of Trip

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Stayed overnight in Mount Gambier	81%	93%	79%	81%	69%
Traveller passing through	15%	4%	3%	15%	31%
Day trip	4%	3%	17%	4%	0%
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

It was found that the majority (81%) of the visitors were staying overnight in Mount Gambier, while 15% were staying overnight away from home but were not staying in Mount Gambier, and 4% were visiting for the day – that is while visitors to the region they were not staying overnight away from their usual residence.

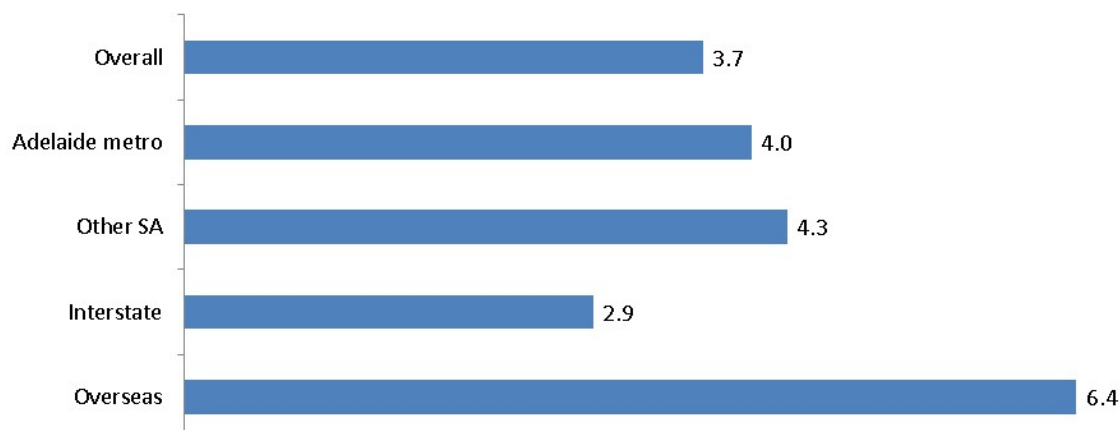
Of those staying overnight in Mount Gambier one third (32%) were staying only in Mount Gambier while the other two thirds (68%) were staying overnight in other places in addition to Mount Gambier.

For those interviewed at an attraction the proportion travelling through the region without staying overnight in Mount Gambier was 19%.

Overseas residents (31%) were more likely to be travelling through Mount Gambier without staying overnight while visitors from Adelaide and elsewhere in South Australia were less likely (4%).

The average length of stay in Mount Gambier is described below (Figure 3.4).

Figure 3.4 Average Length of Stay in Mount Gambier



Sample base – Stayed overnight in Mount Gambier.

The average length of stay in Mount Gambier was 3.7 nights. The length of stay ranged from 2.9 nights for interstate visitors to 6.4 nights for those from overseas.

The type of accommodation used by those staying overnight in Mount Gambier is described below (Table 3.7).

Table 3.7 Accommodation Used

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Hotel / motel	32%	37%	30%	31%	30%
Caravan park - own caravan	29%	12%	13%	38%	21%
Home of friend / relative	9%	12%	9%	6%	15%
Caravan park - cabin / unit	8%	15%	17%	5%	8%
Holiday house / unit	4%	9%	9%	3%	2%
Serviced apartment	3%	4%	9%	3%	2%
Bed and breakfast	3%	3%	4%	3%	
Caravan park - tent	3%	3%	4%	2%	4%
Air BNB	2%	2%		2%	6%
Backpacker / hostel	2%	2%	4%	2%	
Other	8%	2%		10%	13%
Sample	420	91	23	253	53
	100%	100%	100%	100%	100%

Sample base – Stayed overnight in Mount Gambier.

Overnight visitors were most likely to stay in hotel / motel accommodation (32%), followed by their own caravan in a caravan park (29%). Other accommodation in most cases consisted of a motorhome or self-contained vehicle which could be parked on the side of the road and other places designed to service these vehicles. The Mount Gambier showgrounds was mentioned in a number of instances.

When compared on the basis of origin interstate visitors were more likely to stay in their own caravan (38%). Also the proportion staying in their own caravan was 32% in March and 15% in April for the school holiday period.

Also the online survey provided an estimate of 15% staying in their own caravan cf. 33% for those interviewed at attractions.

Staying in their own caravan was also related to the overall length of their trip (59% where length of trip was greater than 30 nights, age was greater than 60 years (44%) or they had travelled the Great Ocean Road (GOR) (41%).

Almost half 46% of the visitors had travelled, or were intending to travel, on the GOR as a component of their trip.

This was related to length of trip with three quarters (77%) of those travelling for more than 30 nights travelling on the GOR. It was also related to age with 54% of those over 60 years travelling on the GOR.

The great majority of the international visitors (79%) and more than two thirds (69%) of those who were passing through Mount Gambier without staying overnight had travelled, or were intending to travel, the GOR.

The information provided the respondents regarding their itinerary was used to segment the sample on the basis of their travel behaviour. Tourers are those respondents who were staying in at least one other place overnight in addition to Mount Gambier as part of their trip. The length of trip relates to the total length of trip rather than their stay in Mount Gambier. The distribution of itinerary segment is described below (Table 3.8).

Table 3.8 Itinerary Segment

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Mount Gambier Only	30%	74%	55%	21%	4%
Short tour 1 - 7 nights	14%	14%	24%	16%	4%
Medium tour 8 - 14 nights	14%	6%	10%	18%	8%
Big tour 14 - 30 nights	16%	3%	3%	18%	29%
Grand tour - 30 + nights	26%	3%	7%	28%	56%
Sample	509	95	29	308	77
	100%	100%	100%	100%	100%

Sample base includes day trip visitors.

Around one third (30%) of the visitors were visiting Mount Gambier only. One quarter (26%) were undertaking a long holiday of more than 30 nights. Roughly equivalent sized groups (around 15%) were undertaking multi destination trips of one week, two weeks, and up to one month.

When compared on the basis origin visitors from Adelaide and other South Australia were more likely to be destination specific visitors to Mount Gambier (74% and 55% respectively).

The visitor's method of travel to Mount Gambier is described below (Table 3.9).

Table 3.9 Mode of Travel

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Private car	82%	85%	93%	89%	51%
Rented car	12%	8%		6%	43%
Coach	3%	3%		4%	5%
Airplane	3%	5%	3%	3%	5%
Other	4%	2%		4%	5%
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

Multiple response – Respondents may have selected more than one mode of transport.

The visitors were most commonly travelling by private vehicle (82%) or a rented vehicle (12%).

When compared on the basis of origin 8% of the Adelaide metro residents, none of the other SA residents, 6% of the interstate residents and 43% of the international visitors were using a rented vehicle.

Other modes of transport mentioned were:

- Motorcycle
- Campervan.

Those respondents were asked where they had stayed on their last stop over and where they intended to stay on their next stopover.

The distribution of stopover prior to arriving in Mount Gambier who did not leave from their home is described below (Table 3.10).

Table 3.10 Overnight Destination Prior to Arrival in Mount Gambier

	Total	Origin		
		South Australia	Interstate	Overseas
Adelaide	7%		7%	9%
Beachport	4%	6%	5%	
Grampians	2%	3%	2%	3%
Hamilton	2%		3%	
Kingston	5%	12%	5%	3%
Melbourne	4%	12%	2%	9%
Millicent	2%	3%	2%	1%
Naracoorte	3%	9%	2%	5%
Nelson	3%	3%	3%	4%
Penola	2%	3%	2%	4%
Port Campbell	3%	6%	3%	3%
Port Fairy	7%	3%	8%	5%
Portland	11%	3%	13%	8%
Robe	9%	18%	7%	12%
Tantanoola	2%	3%	1%	4%
Warrnambool	6%	3%	6%	7%
Sample	344	34	235	75
	100%	100%	100%	100%

Sample base – Prior stop over was not place of usual residence

For those visitors who did not leave from home to travel to Mount Gambier they were most likely to have stopped in Portland (11%), Robe (9%), Adelaide (7%) or Port Fairy (7%).

A higher proportion of visitors from South Australia had stayed in Robe (18%), Kingston (12%) or Melbourne (12%).

The distribution of stopover after leaving Mount Gambier for those who did not return to their home is described below (Table 3.11).

Table 3.11 Overnight Destination Following Departure from Mount Gambier

	Total	Origin		
		South Australia	Interstate	Overseas
Adelaide	12%		10%	21%
Beachport	2%	7%	1%	3%
Grampians	5%	7%	5%	4%
Great Ocean Road	4%	10%	4%	3%
Hamilton	2%		3%	1%
Melbourne	3%	3%	2%	8%
Nelson	2%	3%	1%	3%
Penola	2%	0%	3%	3%
Port Fairy	6%	3%	6%	7%
Portland	6%	7%	6%	4%
Robe	13%	14%	13%	15%
Warrnambool	6%	14%	7%	1%
Sample	329	29	227	73
	100%	100%	100%	100%

Sample base – Next stop over was not place of usual residence

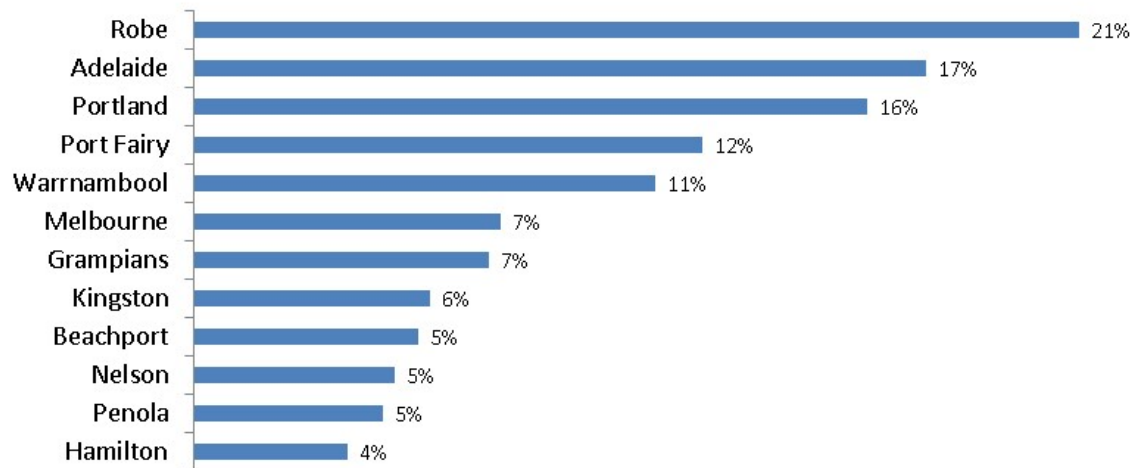
For those who were not returning home after leaving Mount Gambier their next stop over was most likely to be Robe (13%) or Adelaide (12%).

In a small number of cases the respondents mentioned travelling on to Dartmoor as there was free camping. Free camping was mentioned as a factor in travelling to other places and was a factor in decision making.

Those respondents who were passing through Mount Gambier without staying overnight and not returning home were most likely to be travelling to Robe (21%), Port Fairy (11%), Adelaide (7%), Portland (6%), Warrnambool (6%), Grampians (3%), Hamilton (3%). 10% of those passing through hadn't made up their mind where they would be staying.

In summary, the places in which the visitors who were staying overnight in at least one other stop over destination immediately prior to or following their visit to Mount Gambier was as follows (Figure 3.5).

Figure 3.5 Stop Overs Before or After Arrival in Mount Gambier



Immediately before or after visiting Mount Gambier the respondents were most likely to visit Robe (21%), Adelaide (17%), Portland (16%), Port Fairy (12%) or Warrnambool (11%).

3.4 Attractions Visited and Activities

The visitors were prompted with a list of the main attractions in Mount Gambier and were asked whether they had visited or intended to visit these.

The distribution of response is described below (Table 3.12).

Table 3.12 Attractions Visited in Mount Gambier

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Blue Lake	85%	80%	66%	87%	88%
Umpherston Sinkhole	67%	67%	59%	70%	60%
Valley Lake	37%	37%	38%	39%	30%
Engelbrecht Cave	35%	32%	24%	40%	22%
Riddoch Gallery / Main Corner	22%	17%	17%	24%	21%
Princess Margaret Rose Cave	12%	15%	7%	13%	9%
None of these	11%	14%	24%	10%	10%
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

Multiple response

The most popular attractions were the Blue Lake (85%) followed by the Umpherston Sinkhole (67%).

Those passing through Mount Gambier or on a day trip were less likely to visit the attractions. Interstate visitors were more likely to visit the Engelbrecht Cave (40%) while overseas visitors were less likely (22%).

The proportion attending the Riddoch Gallery / Main Corner and the Umpherston Sinkhole was higher during the April school holiday period (36% and 77% respectively).

Those for whom Mount Gambier was the only overnight stay were more likely to indicate that they visited none of the attractions (21%).

The respondents were prompted with a range of activities that they might participate in while in Mount Gambier. The distribution of activities was as follows (Table 3.13).

Table 3.13 Activities

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Natural attractions	78%	69%	59%	84%	75%
Restaurants / cafes	66%	66%	76%	68%	58%
Bushwalking / hiking	41%	33%	45%	41%	48%
Leisure shopping	32%	29%	55%	33%	26%
Museums / galleries	32%	20%	17%	37%	31%
Beach / swimming	17%	15%	17%	15%	26%
National parks / protected areas	17%	10%	14%	18%	18%
Wineries / cellar doors	15%	14%	10%	17%	9%
Farmers markets	13%	14%	14%	12%	14%
Fishing	6%	4%	7%	7%	4%
Festivals / events	6%	5%	7%	5%	6%
Cycling	4%	1%		5%	5%
4WD touring	4%	1%	3%	4%	6%
Diving	3%	3%	3%	2%	4%
Golf	2%			3%	1%
Surfing	2%	1%		2%	4%
Theatre / performing arts	2%	2%		2%	1%
Boating / sailing	1%			2%	
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

Multiple response

The most popular activities were visiting natural attractions such as the Blue Lake and the caves (78%), followed by restaurants / cafes (66%), bushwalking / hiking (41%), leisure shopping (32%) and visiting museums and galleries (32%).

Again those staying overnight in the Mount Gambier region were more likely to participate in a range of activities when compared to those who were passing through and those on a day trip.

Those from other parts of South Australia were more likely to participate in leisure shopping (55%). Visitors from interstate were more likely to visit museums / galleries (37%) and natural attractions (84%).

Those aged 60 or more years were more likely to visit museums / galleries (44%).

Those surveyed in the April school holiday period were more likely to participate in visiting natural attractions (91%), bushwalking (54%) while those surveyed in March were more likely to participate in leisure shopping (35%).

The participation in various activities is also related to the sampling procedure to a degree with those surveyed face to face at the attractions more likely to mention natural attractions (85% cf. 55% for the online sample) and bushwalking (45% cf. 26% for the online sample).

3.5 Information Sources and Booking

The sources of information used by visitors are described below (Table 3.14).

Table 3.14 Information Sources

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
VIC / tourist office	43%	24%	24%	50%	49%
Other websites	27%	26%	7%	29%	29%
Other travel book, guide, brochure	23%	14%	17%	27%	22%
Relatives / friends elsewhere	17%	15%	10%	17%	18%
Limestone Coast Visitor Guide	14%	9%	17%	15%	13%
Testimonial web sites	11%	11%	7%	11%	12%
Relatives / friends in Mount Gambier	11%	20%	28%	7%	8%
Government web sites	8%	10%		9%	8%
Online travel agents	8%	6%	10%	7%	9%
Social media	7%	7%	7%	6%	8%
Apps for smartphones / tablets	5%	3%	3%	5%	6%
TV, newspapers, mass media	3%	5%		3%	3%
Retail travel agent	1%			1%	4%
Sample	518	98	29	314	77
	100%	100%	100%	100%	100%

Multiple response

Visitors were most likely to receive information about Mount Gambier from a visitor information centre (VIC) or tourist office (43%). This includes VICs prior to arrival in Mount Gambier for those on a touring holiday. Other web sites (27%) were important as were travel guides / brochures (23%) and word of mouth (17% for friends / relatives elsewhere and 11% for friends / relatives in Mount Gambier).

41% cited one or more digital source while 33% cited a printed / hard copy source.

A printed source was more likely to be cited by a visitor from interstate or overseas (36%) and a visitor aged 60 or more years (44%) and less likely to be cited by someone aged 18 – 39 years (20%).

Use of a digital source was greater for those staying overnight in Mount Gambier (45%)

When compared on the basis of residence word of mouth from friends / relatives in Mount Gambier was more important for South Australian residents (20% for Adelaide residents and 28% for those from other parts of regional South Australia).

A VIC was less important for those surveyed in the April school holiday period (30%) as was a guide book / brochure (8%) or the Limestone Coast Visitor Guide (5%).

When compared on the basis of age a VIC was more important for those aged 60 or more years (60%) and was other travel guide / brochure (33%). The Limestone Coast Visitor Guide was less important for those aged 18 to 39 years (6%).

Those visiting Mount Gambier only were more likely to identify friend and relatives in Mount Gambier (18%) while tourers travelling for 15 nights or more were more likely to identify VIC (60%) and other travel guide / brochure (33%).

When asked about other sources of information respondents specified in numerous instances that they had been to Mount Gambier in the past. This may have been as a child and had lived there in the past.

Other sources were:

- Caravan park
- Cave diving association
- Employer - for vehicle repairs
- Got info at the Tantanoola Cave
- Hotel reception
- Federation Square VIC – Melbourne
- Looked at map to Adelaide
- Looking for something between Adelaide and Melbourne
- Main Corner
- Map to Adelaide via great ocean road showed Mount Gambier on the way
- Nelson road house
- On the side of a truck, passing through Dubbo, made me curious
- One of places on our map to see. Not talked about in NSW
- Other caravanners
- Probus organised
- Radio
- Life style show in Brisbane showed Umpherston Sinkhole
- Road side sign at Nangwarry
- Shop assistants
- Showgrounds gave us lots of info. Went to dog show and show jumping. Went to Carpenters rocks
- Signage

- Stay another day brochure
- Tantanoola Caves recommended Lady Nelson
- WikiCamps Australia.

Almost half (46%) of the surveyed visitors stated that they booked some component of their visit to Mount Gambier. Those staying overnight in the region were more likely to book (55%) when compared to those passing through (4%) and day trip visitors (14%).

Visitors from Adelaide (63%) and regional SA (66%) were more likely to book while those from overseas (25%) were less likely to book.

Those interviewed during the April school holiday period were also more likely to book (56%).

Those visiting Mount Gambier only (58%) or undertaking a short tour of between 1 and 14 nights (59%) were more likely to book.

The product booked by visitors is described below (Table 3.15).

Table 3.15 Product Booked

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Accommodation	94%	97%	89%	93%	95%
Transport	7%	7%		7%	16%
Restaurant	6%	13%	11%	3%	
Attraction	3%	2%	5%	4%	
Tour group	2%		5%	3%	
Sample	236	61	19	137	19
	100%	100%	100%	100%	100%

Sample base – Booked product.

In the majority of cases the respondents had booked accommodation (94%). Only a small proportion (2%) had booked a tour group.

The booking channel/s used by respondents was as follows (Table 3.16).

Table 3.16 Booking Channel

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Online travel agent	52%	59%	53%	48%	53%
Booked direct	32%	28%	32%	35%	21%
Retail travel agent	8%	5%	5%	9%	5%
VIC / tourist office	5%	3%	11%	3%	16%
Tour / coach operator	3%	3%		4%	5%
Airline / other holiday program	3%	2%	5%	3%	5%
Sample	236	61	19	137	19
	100%	100%	100%	100%	100%

Sample base – Booked product.

For the sample overall the most commonly specified booking channels were an online travel agent (52%) or booking directly with the product (32%).

Those visitors who had booked product were most likely to book through an online travel agent / portal or direct with the product. In the great majority of cases direct bookings were made by phone and also online where the product offered booking on its website.

Those respondents on a short tour – that is a multi-destination trip lasting between 1 and 14 nights – were more likely to book through an online travel agent / portal (65%) while those on a grand tour of more than 30 nights were less likely (20%). Those on a grand tour were more likely to book direct (61%).

Digital booking was age related 71% of those aged between 18 and 39 years booking online cf. 51% of those aged 40 to 59 years and 34% of those aged 60 or more years.

Those aged 18 to 39 years were less likely to book direct (17%).

Other methods of booking identified by the respondents were:

- WikiCamps Australia
- Travel auction
- Van park membership / Big 4

3.6 Visitor Expenditure

The average expenditure in the Mount Gambier region of visitors is described below on the basis of visitor origin (Table 3.17).

Table 3.17 Visitor Expenditure per Adult

	Total	Origin			
		Adelaide metro	Other SA	Interstate	Overseas
Overnight visitors to Mount Gambier					
Accommodation	\$147.1	\$139.3	\$230.0	\$161.2	\$48.4
Food & beverage	\$114.4	\$118.6	\$192.1	\$111.7	\$44.3
Transport	\$56.4	\$53.0	\$118.9	\$57.1	\$9.5
Entertainment	\$21.5	\$16.2	\$11.1	\$33.3	\$4.5
Shopping, gifts, accessories	\$28.0	\$20.1	\$83.2	\$26.9	\$7.1
Other	\$4.8			\$9.2	\$6.8
Total spend per adult	\$372.1	\$347.10	\$635.3	\$399.5	\$120.1
Average spend per adult per night (1)	\$109.2	\$168.3	\$127.1	\$101.7	\$30.2
Day visitors to Mount Gambier					
Total (2)	\$76.6	\$104.4	\$173.4	\$72.7	\$30.2

1. Based on length of stay for those providing expenditure information.

2. Day visitors includes tourers passing through Mount Gambier.

The average expenditure per adult person aged 18 or more years in the Mount Gambier region over the duration of their stay was \$372.10 - \$347.10 for Adelaide residents, \$640 for residents elsewhere in South Australia, \$399.50 for interstate residents and \$120.1 for visitors from overseas.

For day trip visitors and those passing through without staying overnight the average expenditure was \$76.6 - \$104.4 for Adelaide residents, \$173.4 for other SA residents, \$72.70 for interstate visitors and \$30.30 for international visitors. The other SA visitors included a higher proportion of day trip visitors who were shopping in Mount Gambier.

The visitor expenditure is generally consistent with the profile data published by Tourism Research Australia¹² (TRA) for domestic travellers however the spending by international visitors of \$120 is well below the published TRA figure \$295 and \$70 per night. The international visitors sampled therefore were more representative of the budget traveller segment.

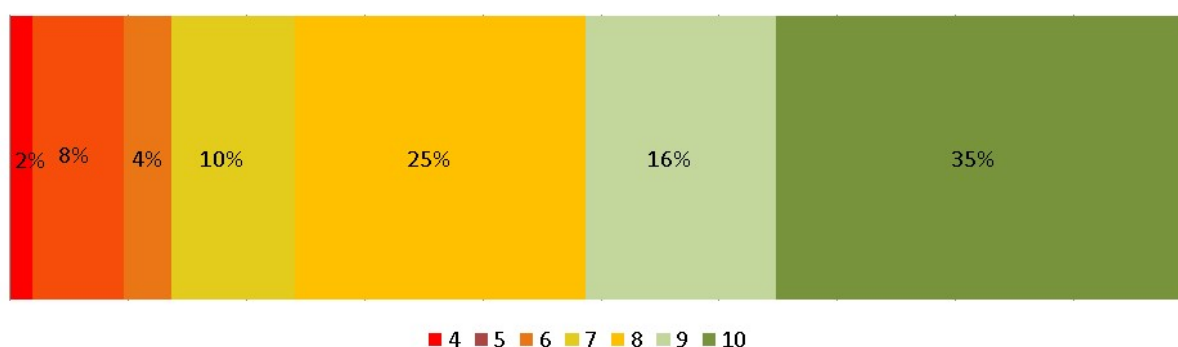
¹² Tourism Research Australia. Local Government Area Profiles, 2015. Mount Gambier (C), South Australia. TRA expenditure estimates are \$352 per domestic overnight visitor (\$146 per night) and \$295 for international overnight visitors (\$70 per night).

3.7 Net Promoter Score and Comments Regarding Their Experience in Mount Gambier

The survey respondents interviewed on a face to face basis at visitor attractions were asked to rate the likelihood that they would recommend Mount Gambier as a travel destination to friends, relatives or colleagues.

The rating was on an 11 point scale from 0 – Very unlikely to 10 – Very likely. The distribution of response is described below (Figure 3.6).

Figure 3.6 Likelihood of Recommendation



The majority of the visitors provided a likelihood of recommendation rating of nine (16%) or ten (35%). The Net Promoter Score was 138 overall. A score of between 100 and 150 is considered to be good while a score of more than 150 is excellent.

The likelihood of recommendation was higher for those interviewed in April compared to those surveyed in March (NPS 160 cf. 130).

Those visiting Mount Gambier only (159) and those aged 40 to 59 years (146) also provided higher scores.

Aspects of their experience of the region in relation to their ratings were as follows:

- Aboriginal culture.

'Would love to do a tour of indigenous history'.

- Accommodation.

'I loved The Barn - best place I've ever stayed'.

'Blue Lake Caravan Park is excellent'.

- Caves are very interesting, natural attractions.
- Cave diving – only place in Australia. Piccaninnie Ponds and Ewens Ponds.

'Snorkling through Ewen's Ponds was a highlight'.

- Beautiful, clean and green. This seemed to sum up Mount Gambier for many visitors.

'Very clean and green. It looks very beautiful when you first arrive compared to other small towns'.

'Very surprised at all the things you can do here. Much cheaper than staying at Port Fairy for the weekend. That was one of the main reasons we all decided to come to Mount Gambier this weekend'.

- Day trips to Port MacDonnell and Penola. Tantanoola Caves.
- Drives – experience drive pamphlets are useful and interesting. Port MacDonnell coastal drives are great.
- Easy to get around – free bike hire appreciated.
- Farmers market.
- Feeding the possums.
- Food, wine & music.

'Wild Ginger restaurant was exceptional'.

- Gardens and roses.
- Gateway to SA.
- Geology of the area is very interesting / unique / volcanos.
- Good base for day trips in the area.

'Lovely town and close proximity to everything. We are staying in Millicent because it seemed like a good central spot to do day trips from but now realise Mount Gambier would've been better'.

- History / heritage buildings & attractions.

'We loved Dingley Dell and the guide, Alan was fantastic, really passionate. Adam Lindsay Gordon / Dingley Dell'.

- Large enough to have services and things to do.
- Link to the GOR.

'I always recommend that friends go to Mount Gambier at the end of a Great Ocean Road trip as it is very interesting both geologically and historically. Also the interactions with aboriginal culture and the impact of farming on the landscape'.

- Lots to see and do – numerous comments suggesting people were not aware of how much there was to see and do in Mount Gambier.
- Lots of natural attractions.
- Nature walk at the Valley Lake.
- People are friendly and helpful.
- Range of accommodation options.
- Regional produce.
- Shopping.

'Beautiful shops, proper shops not just a shopping centre'.

- Things for children to do.

- Umpherston Sinkhole.
- Valley Lake – great for kids. This area needs to be promoted more.
- Value for money - lots to do without spending too much money.
- VIC / Lady Nelson / Discovery centre is excellent.

'The VIC here is great. We have been to a lot of VICs and the Mount Gambier VIC is one of the best. Excellent service'.

- Volcano movie.

Less positively:

- Blue Lake Tour

'The Blue Lake tour was one of the worst I have done'.

'Volcano show excellent, aquifer tour very technical'.

- Booking information / accommodation.

'Found it quite difficult to choose and book accommodation online as a lot of the B&Bs had very poor or no photos to advertise their rooms. The smaller operators seem to have very dated sites. Is there a way of providing incentive for smaller operators to update?'

'We didn't stay overnight because I couldn't find accommodation on line that appealed to me'.

'We would love to see more cottages and B&Bs in town. We find there is high end accommodation and low end but not so many mid- range accommodation options'.

- Cave gardens.

'The sound and lightshow at the cave garden didn't come on at the given times. Waited for an hour, nothing happened'.

- Other information.

'When we googled attractions the Riddoch Gallery didn't come up and the address of the Lady Nelson on Google Maps is incorrect'.

- Cave Gardens – it would be good to have audio to go with the light show.
- Engelbrecht Cave closed on Wednesday.
- Farmer's market – hoped this would be bigger.
- Better promotion of local events.

'Better promotion of events such as the antique motorbike racing event at mac park. Also better promotion of facilities. We have only become aware of mac park in the last year and we live in Naracoorte'.

- Lack of signage.

'Need more direction to main attractions on the town map'.

'Better signage and more info about walks. The information currently is old and dated'.

'Couldn't find info easily on valley lake rim walk'.

'We had trouble finding Engelbrecht caves. Better / more signage'.

- Not a lot of adventurous activities for young people.
- Food & beverage

'Restaurant on Sunday got order wrong twice and then admitted to cooking vegetarian food in the same pan as meat food'.

'Water quality at Port MacDonnell'.

- Tours – It would be good to have tours of the town led by interesting locals. Horse riding tours were suggested.
- Transport.

'Transport is an issue for people who don't have a car. Taxis were expensive. It would be good to have a bus route along the great ocean road. Would recommend it for seniors. More activities for kids would be good'.

'Community bus that will pick up and take home from pubs or caravan park'.

3.8 Other Comments

The online survey respondents were asked what they had enjoyed the most about their visit to Mount Gambier.

The responses included the following:

- Blue Lake
- Cape Northumberland
- Cave gardens
- Farmers markets
- Guided tour of the Blue Lake
- Lady Nelson Visitor & Discovery Centre

'The information provided. It was so well organised and presented and the people at the Lady Nelson information centre were so helpful that it made getting out and about to see so much in four days very easy. Best assistance from any information centre I have visited. Well done and thank you!'

- Lime quarry
- Main Corner
- Morrison's Jazz Club
- Mount Schank.

'In my many previous visits we had never done the Mount Schank rim walk before and that was really awesome'.

- Piccaninnie Ponds
- Port McDonnell area
- Tantanoola Caves
- The Barn Restaurant (number of comments)
- Umpherston Sinkhole / possums.
- Valley Lake / Centenary Tower Lookout
- Volcanic region – Kanawinka Geotrail.
- Water skiing on the lake.

In a number of instances visitors commented on the cleanliness, tidiness and safety of the area and the friendliness of the local people which were important factors in choosing a place to stop over during their journey or as a base for families from which they can explore the area.

When asked whether there were any particularly memorable or quirky experiences the comments were as follows:

- *'Best coffee in Australia from Metro Bakery and Café. Food was also excellent'.*
- *'Coffee and croissant at Metro Bakery. Best coffee and customer service in SA and I had to go back for a second coffee later in the day'.*

- *'Blueness of the lake'.*
- *'Excellent meal at the Barn: good steaks, Idaho potatoes, chopped salads. A bit retro, and very well put together, combined with excellent service and a very strong wine list'.*
- *'Finding out about James Morrison's music centre and local attractions'.*
- *'James Morrison played the third set at the Jazz Club. Seeing performance/meeting Louise Adams'.*
- *'I have been to Mount Gambier a number of times but had never walked around the Blue Lake circle and not realising that there is a power station situated by the lake'.*
- *'I think the Piccaninnie Ponds are amazing and to look down into Mount Schank. Wow you just have soooo much to offer. We are coming back in 5 weeks bringing our daughter. Our son in Victoria will also be coming with his girlfriend sometime soon. I thought only of the Blue Lake as the main attraction but found we will need stay a week to finish what my bucket list had grow into. We had a couple of helpful people working in your shopping area that are indeed an asset to your tourism industry'.*
- *'Love Gala's delicious food at the markets!'*
- *'Possum on the stairs at the sinkhole!'*
- *'Saw a possum in broad daylight & got very near'.*
- *'Seeing a giant wedge tail eagle eating roadkill. Seeing a turtle at Nelson beach'.*
- *'Seeing the 'steam/mist/fog' drifting up off the tidal flat at the fossilised tree area in Pt Macdonnell in the mid-afternoon on a warm day. Very unusual sight'.*
- *'The character running the tour down the tunnel to the edge of the Blue Lake'.*
- *'The dusty cellar at Brand's Laira'.*
- *'The guides at all the attractions were so well informed, they made he attractions more appealing'.*
- *'The man I support had a fire department tour that made his visit very special. Firefighter Joel was amazing and very caring'.*
- *'The movie of the volcanic history of the lakes & surrounding region'.*
- *'The nice serene feeling while in the sunken garden. It's awesome!!!!'*
- *'The only place that can make a wedding in a sinkhole look beautiful'.*
- *'The Umpherston Sinkhole is such a magical place - everyone should see this - it's breathtaking'.*
- *'Volcano movie'.*
- *'Watched a dolphin 'tease ' small boat in the breakwater at Port MacDonnell'.*
- *'While jogging my wife and I had a wombat run beside us briefly'.*

3.9 Destination Image

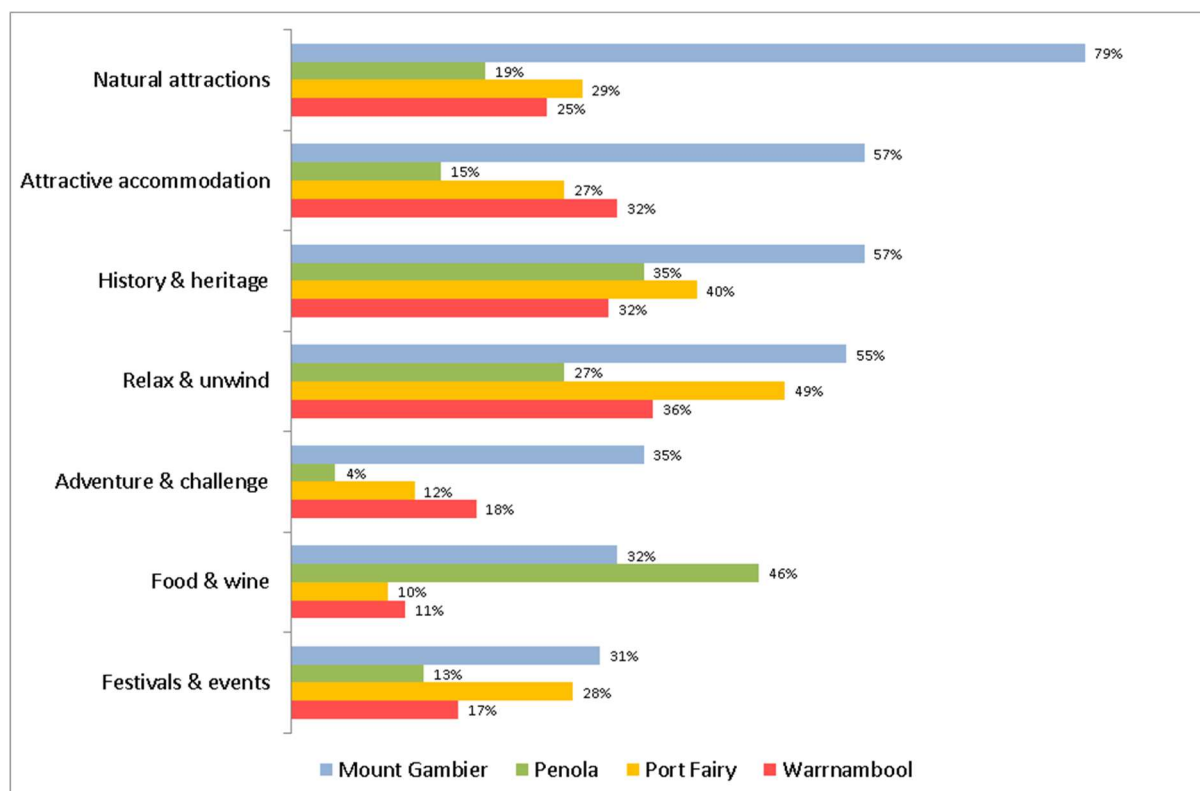
Those visitors who completed the survey online were presented with a set of four destinations in western Victoria and south eastern South Australia: Mount Gambier, Penola, Port Fairy and Warrnambool.

The analysis of the itinerary data suggests that other places more likely to be overnight stops for those visiting Mount Gambier were Port Campbell, Portland, Nelson, Millicent and Naracoorte.

They were also presented with a list of destination attributes and were asked to specify the attributes they associated with each destination.

The destination attributes and the association with each place are described below in Figure 3.7.

Figure 3.7 Image of Mount Gambier



As the data is derived from a survey of visitors to Mount Gambier it is not surprising that in most instances most commonly associated Mount Gambier with the specified attributes.

In comparison to the other places Mount Gambier was most strongly associated with ‘natural attractions’. It is also strongly positioned on the basis of ‘accommodation’, ‘history and heritage’ and ‘relax and unwind’.

In a relative sense Port Fairy is second for ‘relax and unwind’, ‘history and heritage’, ‘natural attractions’ and ‘festivals and events’. Port Fairy is strongly associated with music events

which could be an opportunity for Mount Gambier in association with the James Morrison Academy, regional Fringe in addition to AFL and other events.

Penola has the strongest positioning on the basis of 'food and wine' and is also associated with 'history and heritage' while 'Warrnambool' is positioned most strongly on the basis of 'attractive accommodation' and 'adventure and challenge' (compared to the other places).

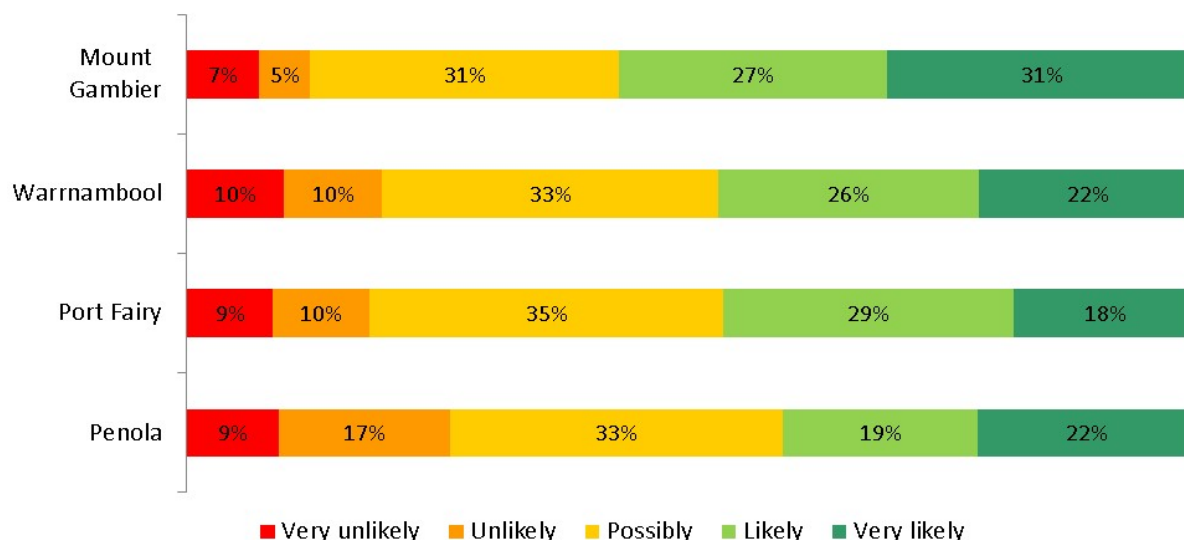
Anecdotally from the comments provided by respondents Port Fairy, while attractive, is perceived as more expensive – Mount Gambier for some offers good value for money and this should be considered as a component of the place brand.

In the comments provided by the survey respondents it was also clear that destination choice is determined by both aspirational and hygiene factors. The experiences offered by the destination will provide the 'pull' factors however for many visitors the place where they stay overnight should offer a range of hygiene factors such as: range of quality accommodation; range of shopping; level of safety / security. Survey respondents spoke about being impressed by the size, cleanliness, greenness, and the pride that residents displayed in their city which was an attractive factor in encouraging them to base themselves in Mount Gambier while visiting other attractions in the region.

3.10 Intention to Visit and Driver Analysis

The online survey respondents were also asked to specify the likelihood that they would visit each of the four places for a holiday or short break in the future. The distribution of response was as follows (Figure 3.8).

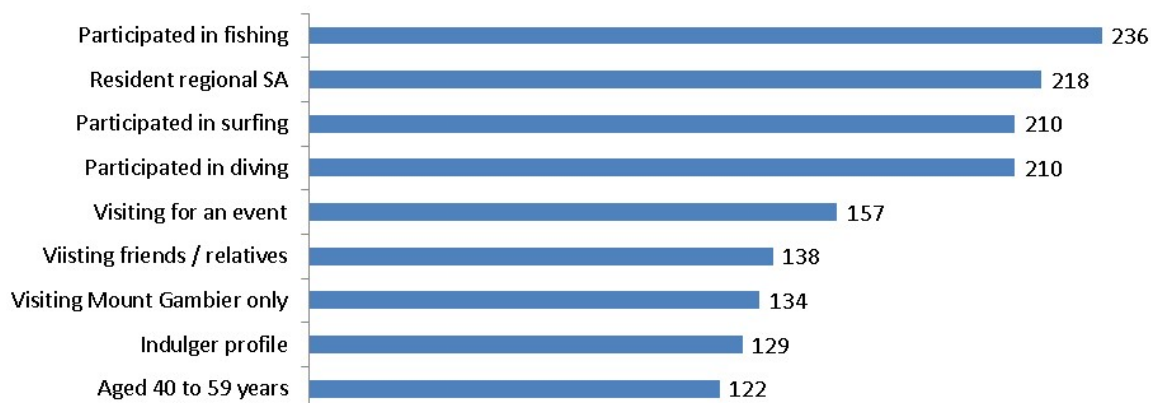
Figure 3.8 Likelihood of Visiting



The majority of the visitors indicated that they would be likely (27%) or very likely (31%) to visit Mount Gambier for a holiday or short break in the future.

A driver analysis was conducted to examine those characteristics that were most closely associated to a likelihood of visiting Mount Gambier again in the future (Figure 3.9)

Figure 3.9 Driver Analysis – Proportion of Respondents ‘Very Likely’ to Revisit Mount Gambier – Likelihood Index¹³



¹³ The index is calculated by dividing the segment percentage by the total percentage. For example if the travelling for work index for males was 150 this indicates that males are 50% more likely to be travelling for work when compared to the sample overall. Percentage base in some instances is very small (<10) and responses therefore should be treated as indicative. The data implies a degree of association between respondent characteristics and likelihood of visiting Mount Gambier in the future. This does not imply however a direct causal relationship.

3.11 Benefit Segments

The online survey respondents were asked to rate a series of experiences or benefits on the basis of how important they would be if considering a holiday destination in Australia.

A process of multi-variate analysis was applied to the ratings to categorise the respondents into distinct groups or segments.

A total of 3 benefit segments were identified which were labelled as 'Discoverers', 'Indulgers' and 'Activity Seekers'. The benefits sought and the proportion of the respondents identifying each as 'very important' are described below (Table 3.18).

Table 3.18 Benefits Sought by Segment – Proportion 'Very Important'

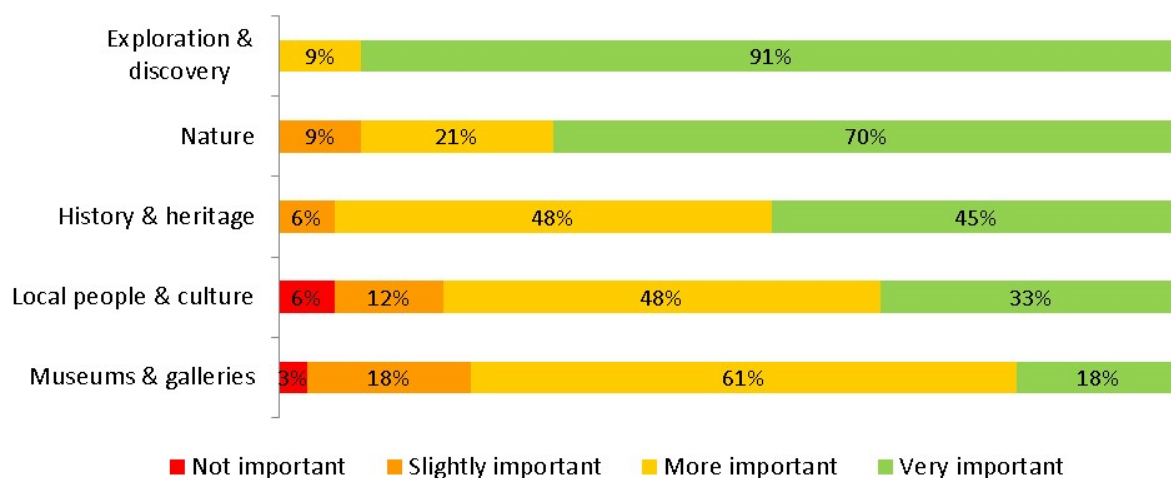
	Total	Benefit Segment		
		Discoverers	Indulgers	Activity Seekers
Exploration & discovery	55%	91%	14%	56%
Nature	48%	70%	14%	56%
Time with partner	48%	45%	66%	36%
Food & wine	47%	30%	62%	50%
Relaxation, reflection	47%	33%	76%	36%
Socialising with friends	33%	18%	38%	42%
Family activities	26%	18%	14%	42%
History & heritage	26%	45%	14%	17%
Local people & culture	21%	33%	10%	19%
Adventure & excitement	19%	15%		39%
Luxury & indulgence	15%	6%	28%	14%
Markets & shopping	15%		14%	31%
Museums & galleries	13%	18%	3%	17%
Physical challenge	8%			22%
Sample	98	33	29	36
	100%	100%	100%	100%

Source: Online survey

Overall the benefits that were 'very important' for the largest proportion of visitors were 'exploration and discovery' (55%), nature (48%), time with partner (48%), food and wine (47%) and relaxation / reflection (47%).

The experiences that characterised each segment and the profile of each are described below (Figure 3.10 to 3.12).

Figure 3.10 Discoverers (34%)



As might be expected the Discoverer group represented 34% of the sample and were characterised by an interest in ‘exploration & discovery’ (91% very important) and ‘nature & the natural environment’ (70% very important). History and heritage, local culture & people, and museums & galleries are also more important.

This group is motivated by intellectual stimulation and the excitement of experiencing new places and things. The profile is characteristic of the touring market.

This group want to find out about the region and interpretation and visitor information provides a mechanism for this. They also want to know what are the special or different things about the region that will add value to their journey.

Interestingly the comments provided by the respondents suggested that many had a past connection with the region having lived in the area or visited at some time in the past. For these visitors there is an element of re-discovery in their trip to Mount Gambier.

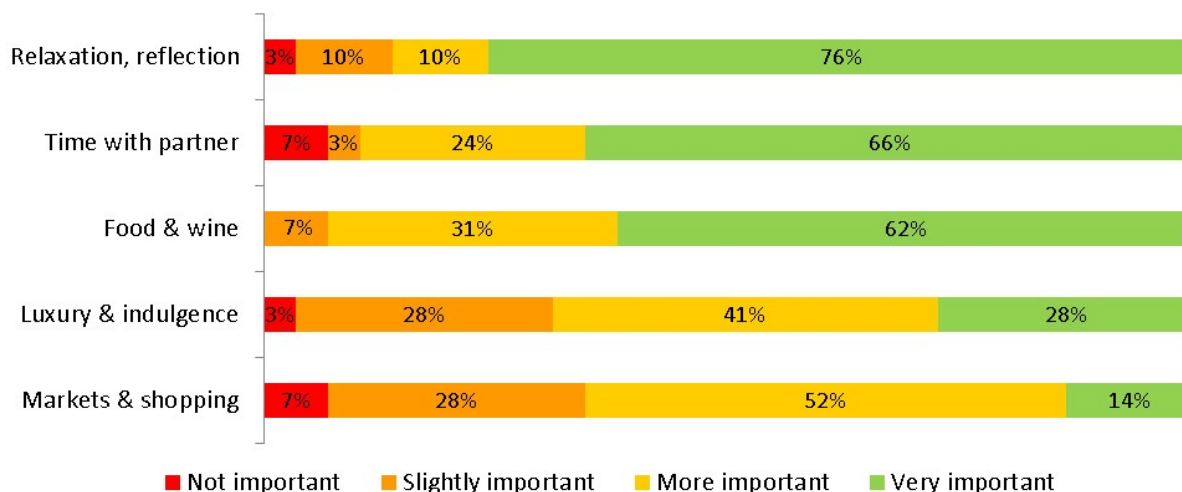
The average stay in Mount Gambier for this group was 2.8 nights.

When compared to the sample overall this group is more likely to be:

- From interstate (73% - index 140);
- Travelling for holiday / leisure purposes (76% - index 146)
- Staying their own caravan in a caravan park (21% - index 139)
- On a touring holiday involving a stay in at least one other place in addition to Mount Gambier (70% - index 139).
- This group was more likely to visit Umpherston Sinkhole (76% - index 128), Valley Lake (64% - index 164) and Engelbrecht Cave (48% - index 170).
- Visit natural attractions (79% - index 143), museums / galleries (42% - index 160).

- The Limestone Coast Visitor Guide (52% - index 174), a tourist office / VIC (48% - index 164) and other travel book, guide, brochure (36% - index 198) were more important sources of information.

Figure 3.11 Indulgers (30%)



The Indulger segment made up 30% of the sample. The experiences sought by this group relate to relaxation, time with partner and food and wine. Luxury and indulgence and markets and shopping were also important when compared to the market as a whole.

This group is motivated by escape from the usual routine, stress reduction and sensory stimulation.

While the length of their trip is shorter than the other segments they are likely to be pay more for the experiences they are interested in on a per night basis.

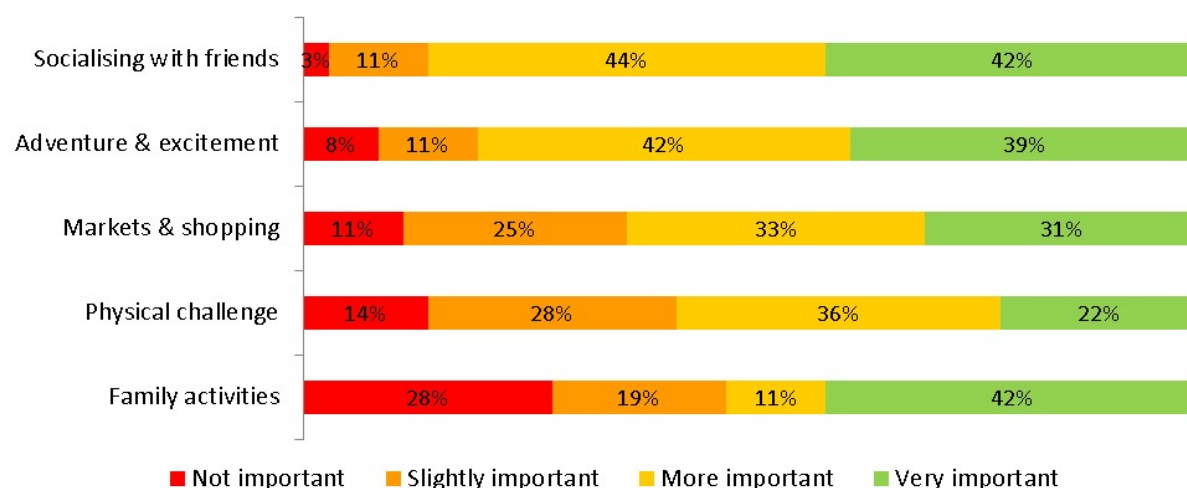
Product for this group includes bed and breakfast accommodation, cellar doors and premium dining experiences such as The Barn.

The average stay in Mount Gambier for this group was 3.0 nights.

When compared to the sample overall this group is more likely to be:

- From South Australia (62% - index 129).
- Staying in a serviced apartment / bed & breakfast (10% - index 338)
- Staying in a holiday house / unit (17% - index 188).
- More likely to have visited none of the listed attractions (34% - index 188).
- More likely to attend festivals and events (17% - index 188).
- Visit wineries / cellar doors (28% - index 180). Less likely to visit natural attractions (31% - index 56) or go hiking / bushwalking (7% - index 24).
- Friends and relatives in Mount Gambier were more important as a source of information for this group (31% - index 160).

Figure 3.12 Activity Seekers (37%)



This group represents 37% of the market and is somewhat diverse in that includes an interest in activities which are adventurous and physically challenging it also includes those with a higher level of interest in family activities and shopping.

Physical stimulation is a motivating factor as are social needs.

This group includes backpackers with an interest in adventure and families where activities are a necessary focus to keep children entertained.

This group had the longest stay in Mount Gambier – 6.3 nights on average cf. 4.2 on average for the online sample.

When compared to the sample overall this group is more likely to be:

- Staying with a friend or relative (19% - index 159).
- More likely to be travelling as a family with children (25% - index 136) or with friends (11% - index 218).
- Go hiking / bushwalking (42% - index 146), fishing (11% - index 272), 4WD touring (8% - index 272), surfing (8% - index 272) and diving (8% - index 272).

4. Survey of Distributors

4.1 Introduction

A survey of distributors was conducted to provide information regarding their awareness of Mount Gambier and the potential to recommend the region and include in travel itineraries.

Data collection was conducted online and by phone with the great majority of the responses captured through phone interview.

The distribution of the sample by type of business and location was as follows:

Table 4.1 Type of Business by Market

	Australia	China	UK	Other	Total
Retail travel agent	1		1	1	3
Inbound tour operator	5		3		8
Wholesaler	2	3			5
Other	6			1	7
Total	14	3	4	2	23

Cell count is number of responses.

The other categories of respondent were:

- Government agency
- OTA
- OTO
- Group discount entertainment book

4.2 Awareness of Mount Gambier

The respondents were asked to rate their knowledge of the Mount Gambier region.

Table 4.2 Knowledge of Mount Gambier

	Australia	China	UK	Other	Total
None				1	1
Limited	7		2		9
Reasonable	4	2	1	1	8
Good	2	1	1		4
Excellent	1				1
Total	14	3	4	2	23

Cell count is number of responses.

When asked what they regarded the strength of Mount Gambier to be as a travel destination the responses were as follows:

Australian based:

- Natural beauty and outdoor activities.
- Unique, unusual.
- Crater lakes popular from a nature perspective.
- Natural scenery, good restaurants and food and of course coastal.
- Only in terms self-drive holidays from Adelaide to Melbourne : Melbourne Adelaide.
- Nature touring aspect – Blue Lake, sinkholes, Piccaninnie Ponds .
- Blue lake, wineries, more a location for the great ocean road on the way.
- Proximity between Melbourne and Adelaide if spending more than 2 nights there is a greater likelihood of staying there.
- Ruggedness, remoteness. Interest for self-drivers on great ocean road.
- Caravan and self-drive destination.
- SA - our motivations around hotels and houseboats - limited knowledge except for major attractions. Barossa, McLaren Vale, KI, Clare which include packages but only know Coonawarra.

Chinese

- SA, food, wine, nature and sporting destination a good place.
- Adelaide city tour, KI and Barossa are very attractive to clients.
- Wineries and countryside.
- Blue Lake, caves.

UK / other

- Location - Blue Lake, scenic beauty, wildlife. Brits enjoy the Aussie lifestyle.
- Based on our lead in brochures food, wine, wildlife and outback and great ocean road.
- Vineyards, wildlife, rural aspects.
- More KI, Flinders
- Landscape, wildlife, wineries and long beaches.

When asked what they regarded as the weaknesses of the Mount Gambier region as a travel destination the responses were as follows:

Australia

- Accessibility, bookable product.
- Bit too far from two major cities and hard to reach for international visitors.
- Don't know very well and my knowledge is top line.
- No major airport limited attractions and accommodation brand names.
- Don't know much about this area – don't have much exposure and don't hear much about it.
- Accessibility – self-drive clients – it's off the track Adelaide – Melbourne, very large region - more a longer drive.
- Great drawback - accommodation range in area and hotels working with trade.
- Used to be the place to stop but development of accommodation options in great ocean road and Fleurieu Peninsula.
- Through drive, not always a stay - only a one night stay.
- Nothing really stands out about Mount Gambier - drive to go elsewhere.
- Mount Gambier is not a known destination even though have heard of it.
- Lack of product, accessibility, challenge for air.
- Remote, distant from ports and airports, large area make it a destination for longer stays unlike Adelaide which has most of this within reach.

China

- Distance is a bit of struggle - Chinese tend to stay in one place like KI, Barossa or Adelaide.
- Is relatively unknown and a quite a distance.
- Distance but like KI
- Not many attractions for Chinese - prefer iconic attractions. Airfares high.

UK / Other

- Lack of awareness internationally in UK.
- Not necessarily have iconic attractions so not necessarily as a recognised destination.
- Location and accessibility.

- Distance and not a fully established packaged destination – i.e. we have 40 people on tour and we would need a fully set up accommodation and attractions - do not know if this area could cater.

4.3 Likelihood of Recommendation

The respondents were asked to rate the likelihood that they would recommend the Mount Gambier region to clients as a travel destination. The respondents were asked to rate their likelihood on a scale of 0 to 10 with a score of 0 being 'Very unlikely' and a score of 10 as very likely. The distribution of the ratings was as follows (Table 4.3):

Table 4.3 Likelihood of Recommendation

Rating	Australia	China	UK	Other	Total
1 - Unlikely				50%	4%
2	23%				13%
3	15%		50%		17%
4	15%	25%	25%		17%
5	23%	25%			17%
6	8%	25%			9%
7	15%				9%
8		25%	25%	50%	13%
Sample	13	4	4	2	23
	100%	100%	100%	100%	100%
Detractors	85%	75%	75%	50%	78%
Passives	15%	25%	25%	50%	22%
Promoters					
NPS	-85	-75	-75	-50	-78

The Net Promoter Score (NPS) is the proportion of Promoters (rating of 9 or 10) minus the proportion of Detractors (rating of 0 to 6) multiplied by 100. The NPS for Mount Gambier amongst the distributors was -78 which is a low score.

When compared on the basis of the type of business the NPS was as follows:

- Travel agent: - 100
- Inbound tour operator: - 88
- Wholesaler: - 60
- Other - 71

Comments provided by respondents in regard to their scores were as follows:

Australia

- Less likely to recommend due to lack of knowledge on the area.
- Hard to reach.
- Don't have an in depth knowledge like Adelaide Hills, KI, Barossa.
- Even as a snapshot - way down on list of SA attractions.
- If it was part of a self-drive as a good stop between two regions for accommodation and amenities.
- Remoteness - preference to go via inland route.
- Definitely offer and recommend.
- Dependent on client's time.
- More a break on drive through to Adelaide / Melbourne.
- Not on the radar.
- Mount Gambier unknown for destination packages.
- Chicken / egg hard to get product out there.
- On personal level, the area is great but from a company level there is not enough infrastructure to meet needs of clientele.

China

- Beautiful place, good for self- drive.
- Limited to Adelaide - there is not much to appeal.
- New and remote - for adventurous.

UK / Other

- Unfamiliar with Mount Gambier myself.
- Dependent on client's previous experience in other tours not just in Australia but around the world.
- Personal basis travelling in SA.
- Not currently within our tour plans.

The respondents were also asked in what circumstances they might recommend Mount Gambier to a client.

Australia

- Those self-driving, looking to get out into regional areas, those driving from Adelaide - Melbourne, those interested in the outdoors.
- Somewhere remote.
- Self-drive.
- It does have potential for self-drivers following the coast road.
- At this stage still a self-drive route for clients.
- If there is the opportunity for longer self-drive trips.

- Stopover on long self-drive.
- The Naracoorte caves.
- Self-drive thru destination. Active outdoors off the beaten path.
- For those with time and money on their hands that want to indulge wine and food options and who may be travelling thru to another destination.

China

- Because it is a border region and if client wants self-drive and stay there as we have this Mount Gambier has some great attractions like horse riding and Blue Lake.
- Wineries would be a drawcard.
- For regular travellers who have seen the rest.

UK / Other

- We have a program that includes this area but need respond to client interests.
- When self-driving between MEL and ADL.
- If client appears interested in wine or wildlife.

4.4 Method of Communication

The distributors were asked how Tourism Mount Gambier could help to improve their knowledge of the Mount Gambier region.

The responses were as follows:

Australia

- They need to work out who will take responsibility for the promotion of the area and who would align with ATE and represent itself better.
- Don't have good answer – SA Tourism have material on Limestone Coast - not sure.
- Don't have a lot of suppliers in Mount Gambier. Great to have more accommodation options and if we were contacted.
- Really top end of Limestone i.e. Naracoorte and Coonawarra is well known because accessible from inland route.
- Need to do a trade newsletter what to do in Limestone Coast and what operators are trade friendly and do a bit of mentoring.
- Resources, stable of internationally ready products - accommodation and attractions - why is it different or better than other options - unique attributes need to be reinforced i.e. Blue Lake, Blue Lake Lantern Festival - how does it differ from other destinations.
- Tourism SA famil next week and this works well for the industry.
- Food and wine trails for the self-drive - local restaurants paddock to plate on an individual basis.
- All about education dissemination of info. Attending an info session on SA and it would good to see some packaging i.e. wine and produce to plate.
- Develop product that would appeal and get the product out to travel and online (trip advisor).
- Consistent high end packaging would be a great idea and more highlighting of the area on an international basis i.e. festivals etc.

China

- More information about accommodation, activities and events - as we promote sport and cultural events programs - local unique activities and better accommodation packages.
- A whole itinerary would be possible.
- More direct contact with tour operators in China - targeted to short quick tours.
- We receive a lot of info and product - we receive very few request from customers.

UK / Other

- Work with tour operators that have potential - training and working with product managers - ATE trade shows - and bringing out specific travel specialists to see product.
- Newsletter in Italian
- Product roadshow - bring over delegations of tour operators to try to change peoples' perceptions of the areas - recently did Margaret River and am now amazed at the change and development premium experience.
- Attend ATE, update by e-Newsletter & promo clip.
- Exposure is a time factor - online and with tour operators.
- We have a defined market if we could get some interest from Tourism Australia, Tourism SA wherever to enable our tours we would be very happy.

4.5 Distribution Partners

The respondents were asked which wholesale programs they worked with. The responses were as follows:

Australia

- Tourism SA.
- We do tailor made.
- Distribute packaged programs to every market – eastern, western, UK, continental Europe - the world.
- Southern world is an IBTO which distributes to wholesalers around world.
- We have our own programs for our in-house self-drive to international market – UK, Euro.
- We contract direct and don't use wholesalers currently focus on Clare, Port Elliot, Adelaide, KI, McLaren Vale - accessible from city main areas.

UK / Other

- Escorted coach tours of exclusive tours - two brands and operate 4 programs with 5-6 days – 8 to 900 passengers per year into Australia alone - tend to focus on Adelaide and Barossa Valley.
- ETA, PTA.
- Book all our programs in Australia thru AAP have largest range.
- Represent pacific destination, so many.

When asked to what extent product in the Mount Gambier region is represented in the wholesale programs you work with the proportion indicating that the region was represented was as follows:

- Australian based – 67%
- UK / other based – 33%

4.6 Opportunities for Product Development

The respondents were asked to comment on whether there were any particular products that Tourism Mount Gambier should focus on in its product development activities.

The response was as follows:

Australia

- Need a reason to go - events, eco, farm stays, unique accommodation and experiences.
- Nature overall is an appealing vertical - like a food and wine connection with Coonawarra or trout fishing or food/accommodation packs or hook into the current holiday makers as a pass thru to Robe, Beachport, summer spots.
- What makes Mount Gambier an attractive destination why would you go there - needs to be reinforced that it is the centre of the Limestone Coast.
- Natural features main drawcard and proximity to wine growing regions - Glenelg River - caves then push accommodation factor using Mount Gambier as centre (i.e. 3-4 night package).
- Some wholesale may feature one hotel and our self-drive features Mount Gambier and it is in the brochures for the great ocean road.
- Blue Lake, sinkholes unique aspects that can be seen = only Silver Birch, Barn and another is featured.
- Mainly hotels - local attractions and because of self-drive need a dummy itinerary to enable day choices.
- Self-drive food and wine packages - stop over destination on the way thru SA. Kid friendly activities.
- Self-drive - fly in and hire outs accommodation, foodie and wine packages new distribution channels can be grown - like to see more information and education from TSA with more stakeholders being involved with our own newsletters and advertising.
- Timeline Program which allows the operators an ability to put together packages which would feature these attractions and including good accommodation.

China

- At moment Chinese people are not really having the time to travel long distance - have an ITO in Adelaide so there is need for a complete package to be available in accommodation/attractions.
- A tight itinerary and direct flights.
- Wines, wildlife are key but awareness in China is limited.

UK / other

- Accommodation.
- Awareness and education and looking at destination itinerary that we could use for our clients.
- Marketing tends to lean on Adelaide attractions. Should focus on outback and rural to expand the potential of region.
- Self-drive concentrate on what's there to see for travellers from Murray River direct traffic through the Coonawarra district as well as down the coast really showcase the region.
- We would like to expand our tours into SA so we would be looking at large group catering perhaps from Adelaide and its attractions KI via the Limestone Coast to Melbourne - we would need big accommodation in a place like Mount Gambier.

4.7 Marketing Focus

The distributors were asked to comment on whether there are any particular markets that Tourism Mount Gambier should focus on for its marketing activities. The responses were as follows:

Australia

- Online is a great place to start as we can distribute through all markets very quickly.
- Nature, coastland, landscape, unique country experience, farm produce and stays - middle demographic as well as young independent travellers.
- Independent traveller - print and digital and social media - pull airlines into helping allowing a connector with larger airlines for a quick getaway package as well as group tours via train and bus short breaks.
- There is a lot of competition from more accessible parts of SA - it would need to be very special to make a difference - perhaps group o/s booked tours would be the answer.
- Independent travellers and self-drivers - aligned with great ocean road southern tour.
- UK and US/Canadian markets and Germans would be OK because that is where self-drive mostly comes from - limited Asian market but confidence growing there - mostly thru bus tours at moment.
- Self-drive at moment is main market for Mount Gambier for inbound clients - perhaps could offer farm stay/visit for eastern group market (coach) and winery buffs would appeal.
- Self-drivers euro and UK would be the major segments, Canada and Latin and US in terms of demographic it would be 40-65 and some 35 up would be doing self-drive - overland groups would need to have a reason to stay in Mount Gambier - Blue Lake.
- Self-drive market is the best option here - UK Euro - US tends not to self-drive so would recommend targeting the continental markets first.
- Self-drive - grey nomads - young couples with kids - national as well as international - people with time who are keen on wine and food.
- It would be great to include this area in our specials - Scoopon specifically has 40% of database 40+/70% woman/ 50-60 age mark so relies on foodies and winies with money.
- Definitely fits the self-drive luxury or escorted long tour maybe look at this for a tour that starts Adelaide stops Mount Gambier and then Great Ocean Road to Melbourne to get the groups in but should focus on 40+ first.

China

- Because there is only 10 day annual holiday in China and they like to hop in and out of the cities.
- Well-heeled Chinese like the best in accommodation and comfort and like it to be organised very well.
- Should focus on previous visitors from China and would like to see more of it in a remote - companies and individuals who are interested in wine.

UK / Other

- Self-drive, honeymoon.
- Large programs to Canada, America, NZ so have a large data base of customers that already interested tapping in this sort of destination - demographic mature market.
- Definitely highlight the more personalised experience and perhaps focus on the individual packaged experience with a unique luxury twist.
- Focus on older, better-off self-drivers with time and interest in wine, food, scenery.
- Because it's remote it is ideal for coach and escorted tours - we have a niche market of British Indians who like comfort but also the good things.

5. Industry Stakeholders

5.1 Introduction

A survey of tourism operators and other stakeholders was conducted to provide feedback regarding the industry's view of issues relating to destination branding and product development.

The survey was conducted online and a total of 17 responses was received.

In addition to survey responses submissions were received from Guy Matthews in regard to the heritage of Mount Gambier and the establishment of a replica of the plane flown by Arctic and Antarctic explorer John Riddoch Rymill and a discussion paper submitted by June Kain relating to the marketing of the Limestone Coast. These documents are attached as appendices.

5.2 Destination Branding

5.2.1 Core Attribute

The respondents were asked whether there was one key experience or attribute that differentiated the Mount Gambier region from other tourism regions in South Australia or Western Victoria.

The respondents most commonly identified the Blue Lake and the unique volcanic formations and associated geology.

Other attributes included:

- Caves and craters.
- Food and restaurants.
- Little Blue Lake.
- Location – midway between Melbourne and Adelaide.
- Natural beauty of the area.
- Umpherston Sinkhole.
- Valley Lake.

When asked how the key attribute would vary on the basis of origin market comments related to the uniqueness of the geological formations and history which would be attractive to all visitors.

- No other area in Australia has the volcanic history of Mount Gambier & the surround and the lush green of the fields and forests. Mount Gambier is eco unique.

Comments relating to specific markets were as follows:

Domestic market

- Lakes, geology, wine and food.

International visitors

- Volcanoes & associated geology.
- Ease of access to volcanoes.
- The Umpherston Sinkhole experience is appreciated by Australian visitors but absolutely embraced by internationals who appreciate the up close & personal experience with the possum interaction.
- Internationals appreciate open spaces, coast, geology.
- For Chinese visitors fishing, seafood – incl. access to tuna at Port McDonald.

5.2.2 Other Strengths

When asked what other strengths the region offered comments were as follows:

- Beaches.
- Canunda national park (4wding on the beach not allowed in Victoria).
- Clean green township and the fact that Blue Lake is located in an extinct volcano which provides the town water. The Crater Lakes provide excellent family experiences, Cave Gardens, Engelbrecht Cave and Umpherston Sinkhole (especially at night) are all popular attractions for all visitors.
- Clean and green with produce and various natural wonders.
- Crater Lake.
- Diving.
- History base around the volcanic activity of the past. The stories that go with this and the fore fathers that drained the wetlands and established the district.
- Nature.
- Regional produce.
- Valley lakes, Umpherston Sinkhole, the gardens are always kept well, sinkholes - which need to be rebranded, i.e. Instead of Umpherston Sinkhole use 'the Sunken Garden'. Closeness of wineries, seafood. The road trip.
- Wine.
- No \$ cost on many activities .
- Free natural experiences, e.g. caves, sinkholes, lakes, Mount. Schank.
- Unique cave tours...we have some of the best.
- Lobster season attracts lots of International tourists.
- Great local produce and food experiences.
- Wineries, forestry, fishing, cave diving, trail walking.
- Coastal and its products, Coonawarra and it products.
- Umpherston Sinkhole, Main Corner Complex, Lady Nelson tour, Centenary Tower, Engelbrecht Cave, Port MacDonnell, Mount Schank, Dingley Dell, Tantanoola Caves, Glenelg River Cruise.

5.2.3 Attitude to the 'Limestone Coast'

The respondents were asked whether the name 'Limestone Coast' should be retained as a component of the branding for Mount Gambier as a tourism region.

Almost two thirds (61%) of the respondents were in favour of retaining the 'Limestone Coast' branding in some form.

Comments included:

Where in favour:

- If the Limestone Coast Region was prepared to split up into various sectors I would be happy with 'Mount Gambier & District of the Limestone Coast' see my email sent separately.
- I think we need to stick with a brand and stick with it too much time and money are spent reinventing our region that could be utilised promoting.
- The limestone coast totally depicts our region... it is exactly what we are.
- We should align to the state tourism branding for the region.
- I don't see the point in wasting money changing.
- Whilst it can be noted that we are the regional city of the Limestone Coast, I feel that a number of centres within the Limestone Coast are doing well enough all on their own that we need to be seen as a destination all on its own.

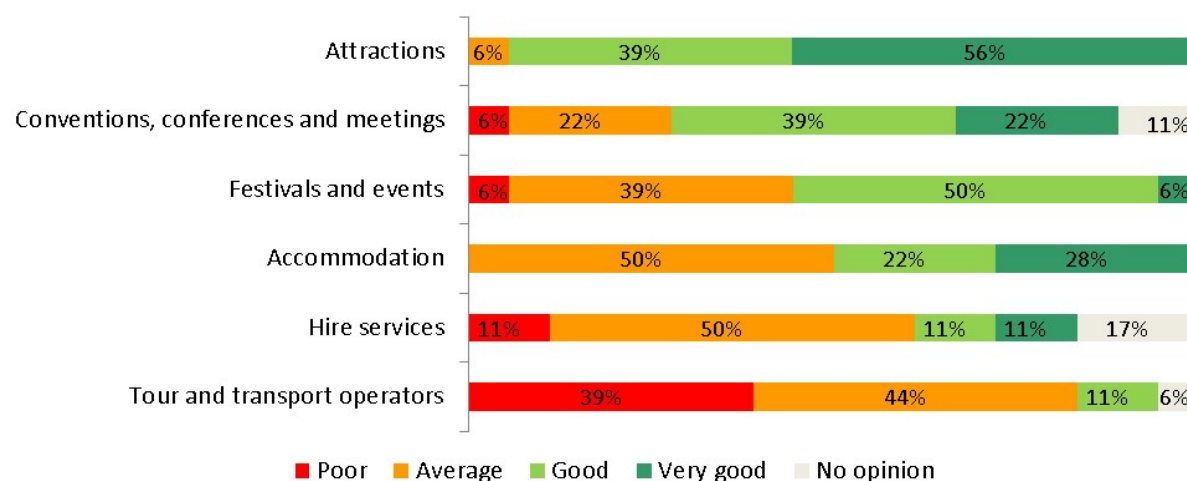
Where not in favour

- Not really I was an integrator of using the name Kanawinka that we proposed after the Coastal Fault Line that runs from Padthaway to Portland - Kanawinka 'The Land of Tomorrow'.
- Nobody knows what it means and the Limestone Coast Region is too large to be serviced effectively by a regional body.
- The Limestone Coast is too broad. Mount Gambier is not on the coast, therefore, it is confusing messaging.
- No one knows where the Limestone Coast is, it's a too broader area.
- Literally it refers to a 'coast' and covers inland towns/attractions as well as Mount Gambier, such as Penola, Coonawarra, Naracoorte etc.
- Does not reflect our brand - coast is limiting and does not explore the inland - limestone does not reflect the experiences our area can offer.

5.3 Rating of Product and Experiences

The respondents were asked to rate the quality of tourism product and services in the Mount Gambier region. The distribution of response is described below.

Figure 3.1 Rating of Tourism Product and Services in Mount Gambier



Attractions were the most positively rated with 56% rating them as ‘Very good’ and 39% as ‘good’.

Half of the respondents (50%) rated accommodation as ‘average’ while 50% rated accommodation as ‘good’ or ‘very good’.

Only one fifth (22%) rated hire services as ‘good’ or ‘very good’ while most respondents rated tour or transport operators as ‘poor’ (39%) or ‘average’ (44%).

Comments provided in regard to the ratings were as follows:

Accommodation

- Motel accommodation range from Good to Average. Some B & B's are world standard, a couple of hotels have classic accommodation.
- There has been an influx of house letting accommodation of late.

Conference facilities

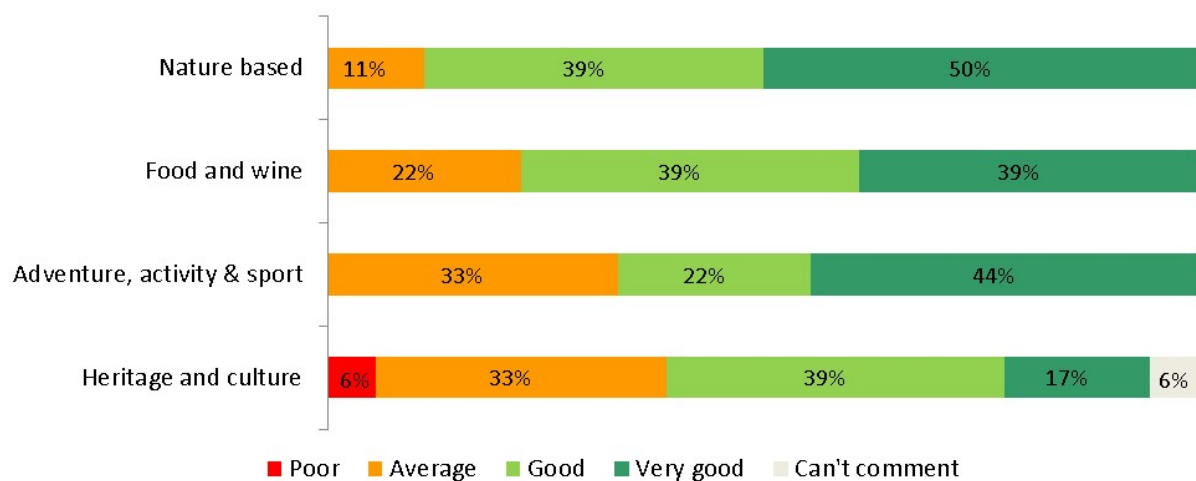
- Mount Gambier needs a 'proper' conference and accommodation centre which can encompass all conference needs.
- We need a central conference/convention centre that can cater to a large participation. We need a conference/convention centre that is economically & geographically more accessible for large number groups. The new Main Corner precinct should have provided this but has missed its mark.

Tour operators and transport

- Tour operators can't survive on the low numbers.
- Busses will come when we have an airport landing 100 seat planes.
- I think that people who arrive are given limited opportunities to do tours. Also the taxis do not present a very professional approach as the first point of contact with the region.
- Bad experiences with tourist operator at the Blue Lake.
- Bus stop at Lady Nelson, no local transport to get into town. Bus could have a drop off in town.
- Tours are practically non-existent or run by people who aren't very personable. The City bus service has no peak hour service and very limited runs.

The respondents were also asked to rate the tourism experiences on offer in the Mount Gambier region. The distribution of response is described below.

Figure 3.2 Rating of Tourism Experiences



The experiences offered by the Mount Gambier region were generally rated positively with the majority providing ratings of 'good' or 'very good' across all criteria.

Nature based experiences were most positively rated (89% 'good' or 'very good') followed by food and wine (78% 'good' or 'very good'), adventure activity and sport (66% 'good' or 'very good') and heritage and culture (56% 'good' or 'very good').

Comments provided by the respondents in regard to their ratings were as follows:

Nature based

- I believe we are missing a number of opportunities - the potential of well orchestrated mountain bike trails, walking trails, pine forest walks and visits to the limestone quarries are very unique experiences that locals are too familiar with however this has opportunity for inclusion into the experience of the tourist seems to be sadly lacking.

Food & wine

- Cellar doors are as good as anywhere however the farm based produce could be expanded on.
- Opening hours of local restaurants and businesses are an issue. It is often difficult to recommend when they are often closed.
- Food - restaurants cafes etc. there are only a handful which opens 7 days a week.

Other

- Again Shopping 7 days a week is limited to the 'few'.
- Not nearly enough organised or promoted experiences.
- I feel many of the organisations that cater to above lists do not advertise their services effectively enough. An excellent example is any and all walks / experiences within the forests are detailed on brochures by Forestry SA but trying to get a steady supply of this information is not easy.

5.4 Product Gaps

The stakeholders were asked whether there are any product gaps or weaknesses that the tourism industry should focus on as a priority.

The areas of weakness identified were as follows:

Access

- Cost of getting to Mount Gambier is a large obstacle. Can the existing airline maybe we could try an incentive based trial to grow the market?

Accommodation

- More 4 to 5 star accommodation.

Advertising / Promotion

- Although offering tours to the public for 30yrs now Engelbrecht Cave still remains Mount Gambier's best kept secret. With many people stumbling across it or hearing about it from others who've been there and not through advertising or tourist info centres and sites.

Conference facilities

- Large capacity function / conference centre centrally located.
- Conference Centre.

Distribution

- Develop more commissionable products (2).
- Most tourism activity is free. This means there is no extra revenue generated, in particular for the community's assets that are managed by the council. Local business advertising for tourism is extremely poor. There is no local business advertising within the main corner complex, there is also no advertising on the outskirts of town as you drive in. Our 'civic guides' boards are a joke located in ridiculous places where tourists will not see them.

Festivals and events / entertainment

- Music festivals would be awesome and also, a gold class cinema would be great.

Nature based

- Value adding Blue Lake experience.

Shopping

- You just need to look at Port Fairy to get the answer. Perhaps shops in Mount Gambier selling similar products can open on a roster so not all are open at weekends but visitors can at least 'shop'.

Tour operations

- Subsidise a tour operator to run every day by co-opting volunteers to drive a bus.
- The ability for tourists to be shown the stunning out of the City attractions (Tour Guides).

- There are no tourist operators who take people on tour, e.g, mini buses to the sites, walk and wine trail, forest exploration etc.
- Farm tours, crayfish experience, aboriginal experience (art).
- Family adventure activities or tours for locals and tourists.
- Increase in investment into Eco-tourism.
- Increase in investment into adventure tourism (mountain bike trails, pond diving, sinkholes etc).

5.5 Product Strengths / Opportunities

When asked whether there were any product strengths that the region possesses that could be better exploited the responses were as follows:

Aboriginal

- The Aboriginal dreamtime stories for these could be promoted.

Activity based

- Great opportunities for cycling tours utilising the railway lands. We have cycled around many cities across the world.
- Improve cycling / walking trails.

Drive Touring

- From Sydney Mount Gambier could be the 'Gate Way' to the Great Ocean Road Drive to Melbourne or the drive adventure to Kangaroo Island along the mysterious 'Coorong'.

Nature based

- Interpretative centres at Little Blue Lake and Mount Shank.
- Shacks on the Glenelg River could be developed as a stunning tourist destination with three night stop overs.
- Canunda national park and the Valley Lakes.
- That it is a volcanic region, with dormant volcanoes, craters, sinkholes.
- The Valley Lakes. Ample parking and green spaces but some tourists don't see the entry. Signage is weak, and food vans etc. should be encouraged down there, not discouraged.

Adding value to the natural attractions through infrastructure, interpretation and activities was recognised as an opportunity.

- Have the current cafe at the blue lake demolished and build a world class cafe which overlooks the lake! It is an embarrassment.
- Development of crater lake precinct e.g. zip line, glass bottom boat, kayaking.
- More need to be done with our current attractions especially Blue Lake and Valley Lake areas. We need to offer more than just a lake, an experience needs to be created.
- We have so many caves, sinkholes and volcanic craters that hold a wealth of historic and geological fascination for so many people. I feel they are very much underutilised.

Port MacDonald

I think that the port mac region could be further enhanced but in reality it won't happen until the councils merge. I think the councils would be much stronger as a united front.

5.6. Public Infrastructure

The respondents were asked whether there were any other gaps or weaknesses regarding key public infrastructure that effects the competitiveness of the tourism industry in Mount Gambier.

The responses are summarised below.

Airport

- The airport must have direct flights to Sydney/Melbourne/Adelaide at least 100 seats landing three day a week in and out.

Attraction

- We need a major attraction to bring visitors to Mount Gambier - a chair lift across the crater to the tower, a mono rail between Cave Gardens the tower, Engelbrecht Cave, Umpherston Sinkhole etc.
- The council needs to focus on keeping the youngsters in Mount Gambier, by ensuring the swimming holes like Little Blue Lake etc are taken care of and promoted as a unique feature to Mount Gambier, also making Valley Lakes safe for swimming, getting water activities for hire so the council can make extra income.

Blue Lake

- The cafe at the Blue Lake faces the road. There is no where for visitors to sit with a glass of wine and something to eat to enjoy the serenity of the blue lake. This means visitors get taken to the blue lake but don't stay, they may head off to Port MacDonnell, Nelson or Robe. We need them to be able to spend more time at the Blue Lake and this needs viewing areas where food and beverages are held.
- Trees need cutting down around the Blue Lake especially when you first bear right on Bay road these weed trees have been slowly blocking the view for 10 years. Also the Cafe should be 2 stories with the top floor with the view overlooking the Blue Lake. this could be built quite easily and would be money well spent.

Convention Centre

- Large volume centrally located function/conference/convention centre.

Signage

- Local business signage.
- Signage is poor. We receive comments every week about poor signage.
- Signage. Old wooden signs with cut out letters from the 70s. Branding done by people with no design skills. Inconsistent and unattractive.

Visitor Information Centre

- The Visitor information centre is not in walking distance in town. It is good position for caravaners. Perhaps a VIC in Commercial Street or the Main Corner or pop-up VICs at main events.

- Incorporate a tourist info centre right in town. Keep Lady Nelson but add another centre with proper signage, including a topography of the lakes etc. (refer to the centre in Murwillimbah northern NSW which is amazing). Maybe the Rail Lands can be looked at to have a visitor centre and build adequate parking. The land is so big and surely a corner of it at the Bay Rd end could be used. Don't consider the main corner as there's simply no visitor parking.

5.7 Distribution Channels

When asked whether they had any comments regarding the distribution channels available to tourism operators in the Mount Gambier region the response was as follows:

- I am currently consulting with Councils in the Limestone Coast and hope to consult with those in the Grampians and Great Ocean Road Regions in regard to Two State Touring concept.
- An updated website should go a long way.
- We need a Mount Gambier app with location identifiers that can push notifications and can be updated by Council staff to promote regional events.
- If there could be a central online calendar for all events coming to the City such as sports, music, conferences, vintage car rallies and the like e.g. the BMX championships etc., then allowing providers to advertise with or notify the organisers of products, availability of rooms.

5.8 Linkage with Glenelg Shire

The Tourism and Media Coordinator for the Glenelg Shire Council provided some feedback regarding linkage with the Mount Gambier region.

The Shire, while traditionally Victorian focused, is taking a greater interest in the south east of South Australia.

The Green Triangle Tourism Action Plan was mentioned as a framework for cooperation between Mount Gambier and western Victoria and should provide opportunities for closer ties with respect to marketing and product development.

It was also stated that there is a proposal for a large visitor centre in Nelson which would be promoted as the gateway to the Great Ocean Road. This facility should draw more travellers into this area which would be a benefit for Mount Gambier.

Portland attracted 6 cruise ships in the first 4 months of 2017 – with more than 6,000 passengers exploring local sites.

Passengers in some cases travelled from Portland to Port Fairy and the 12 Apostles. Passengers also visit the Princess Margaret Rose Caves and the Glenelg River. Council is working to develop tours to the Blue Lake and the Coonawarra wine district. Attractive product in the context of a day trip was the Blue Lake, wineries, The Barn, Apple Farm.

Day tours are being developed by Abercrombie & Kent and Oceania.

Other opportunities identified were music related tourism. An initiative known as South East by South West has been launched to promote musical talent from Warrnambool to Keith.

The program is associated with Mount Gambier based musician and X Factor runner up – Louise Adams.

The James Morrison Academy and the Generations in Jazz competition also provide a stimulus for cultural tourism to the region.

5.9 Other Issues

Other comments provided by respondents were as follows:

- We must understand the facts that business is very difficult here in Mount Gambier and in the region with one business going bankrupt every week! We must try to support each other more in a real way buy spending our money locally and being a little more open to net-working and helping each other for our mutual benefit.
- Segmented tourism operators. People trying to work against each other rather than focussing on support and promotion of our strengths.
- Whilst everyone who comes here is aware of the Blue Lake, not that many are aware of the Aquifer Tours (prior to me mentioning them). What this translates into is a lack of allocated time to complete the tour.
- Also too many people are under the impression that Mount Gambier only has a lake and a sinkhole and can be covered in an hour or two. It's not until they are here they realise they need at least 3 or 4 days or more but sadly for too many they are on a tight time frame and cannot enjoy what the town and surrounding areas have to offer.
- It's important that any promotion is inclusive of all operators, not only the members of TMG as the worst thing is to give an impression that Mount Gambier is smaller than it actually is.
- The whole region has to work together to ensure tourism is a major industry in our region. We need to have commissionable products and have enough activity for tourists to stay another day instead of being a stop-over.
- Yes we have the tourism but not the facility to bring the tourists.
- All operators find it very difficult to work together and seem to be wary of net working and collaborating. Seems to me they are frightened they may lose business by doing this. I have tried many times to work with other accommodation providers but many no replies. Restaurants don't want to offer specials when it is only helping them and not us.

Appendix A Questionnaires

Visitor Survey – Central Location Interviews

- 1. Where do you usually live?**
 - South Australia – specify postcode
 - Other Australian State – specify postcode
 - Other country – specify country

- 2. What is the main reason for your visit to Mt Gambier?**
 - Holiday / leisure
 - Visiting friends and relatives / including weddings, birthdays etc
 - A festival or special event
 - Conference / convention
 - Business / work
 - Other – please specify

- 3.1 How many nights are you staying in the Mt Gambier region? SHOW MAP OF IN-SCOPE REGION.**
 - Day trip only – go to Q4
 - Specify number of nights

- 3.2 What type of accommodation are you using in Mt Gambier?**
 - Hotel / motel
 - Serviced apartment
 - Bed and breakfast
 - Holiday house / unit
 - Caravan park – own caravan
 - Caravan park – cabin / on site van
 - Backpacker / hostel
 - Home of friend / relative
 - Other – please specify

- 4. Where did you stay prior to arriving in Mt Gambier?**
 - My home
 - Specify location

- 5. Where do you anticipate you will be staying after you leave Mt Gambier?**
 - My home
 - Specify location

- 6. For how many nights in total will you be away from home on this trip?**
 - Specify number of nights

- 7. On this trip did you travel, or do you anticipate travelling, on the Great Ocean Road. SHOW MAP.**
 - Yes
 - No

8. How did you travel to Mt Gambier?

Private car
Rented car
Coach
Airplane
Other - specify

9.1 Who are you travelling with? SELECT MULTIPLES IF TRAVELLING WITH A TOUR GROUP.

No one else
Partner / spouse
Family – incl. children
Family – not incl. children
Friends
Tour group
Other – please specify

9.2 Including yourself, how many people are in your immediate travel group?

Number of persons 18 +
Number of adolescents – 15 to 17 years
Number of children 14 years or less

10. Which of the following attractions have you visited (or do you intend visiting) in the Mt Gambier region?

Blue Lake / Valley Lake
Cave Gardens
Coonawarra Cellar Doors
Princess Margaret Rose Cave
Riddoch Gallery
Tantanoola Caves
Umpherston Sinkhole

11.1 From what sources did you obtain information about the Mt Gambier region before your visit? RECORD MULTIPLES.

Government web sites – southaustralia.com limestonecoast.com
Social media / forums - Facebook, Twitter, Instagram, Youtube
Testimonial web sites - e.g. Tripadvisor.com
Google search
Online travel agents - e.g. Expedia, Wotif
Other websites
Apps for smartphones and tablet devices
Relatives / friends in Mt Gambier
Relatives / friends living elsewhere
Television programs, newspapers and other mass media
Regional travel guide
Other travel book, guide or brochure

Travel agents (shop front - not online)
Tourist office / Visitor Information Centre
Other – please specify

11.2 From what sources did you obtain information about the Mt Gambier region following your arrival? RECORD ABOVE.

12.1 Did you book any aspect of your visit to Mt Gambier – either before or after your arrival?

Yes
No

12.2 If yes, What elements of your trip did you book? RECORD MULTIPLES.

Accommodation
Attraction
Restaurant
Tour group
Transport
Other – please specify

12.3 Through what channels did you book? RECORD MULTIPLES.

Retail travel agent – (shopfront or by phone)
Online travel agent / portal
Airline / airline holiday program
Tour / coach operator
Visitor information centre
Other – please specify

13.1 How much did you spend, or do you anticipate spending, in the Mt Gambier region? Please estimate your spending for each of the categories below. Please include spending by yourself and other members of your ‘family’ group i.e. family and or friends travelling together.

Accommodation – incl. food and beverage included in the accommodation price
Food and beverage - restaurant/ cafes, groceries/ snacks, drinks, alcohol
Transport – fuel, taxis, car hire costs, airline, train, bus
Entertainment - tours/side trips, attraction entrance fees, movies, gambling
Shopping, gifts, souvenirs
Other – personal services, medical
TOTAL

13.2 How many people did this expenditure cover?

Number adults aged 18 or more years
Number adolescents aged 15 to 17 years
Number of children aged 14 years or less

14.1 What is the likelihood you would recommend Mt Gambier to friends, colleagues and relatives as a place to visit? 10 point rating scale.

14.2 Why is that? Record verbatim comments.

15. What is your age?

18 – 29 years

30 – 39 years

40 – 49 years

50 – 59 years

60 – 69 years

70 or more years

16. What is your gender?

Female

Male

Visitor Survey – Online Survey Questionnaire

1. Where do you usually live?
 2. South Australia
 3. Other Australian State
 4. Other country

2. What was the main reason for your visit to the Mt Gambier region?
 1. Holiday / leisure
 2. Visiting friends and relatives / including weddings, birthdays etc
 3. A festival or special event
 4. Conference / convention
 5. Business / work
 6. Other - please specify _____

5. How many nights did you stay in the Mt Gambier region?
 1. Day trip only
 2. One
 3. Two
 4. Three
 5. Four
 6. Five
 7. More than 5 - please specify _____

4. What type of accommodation did you use in the Mt Gambier region? Select all that apply.
 1. Hotel / motel
 2. Serviced apartment
 3. Bed and breakfast
 4. Holiday house / unit
 5. Caravan park - own caravan
 6. Caravan park - cabin / onsite van
 7. Caravan park - tent
 8. Backpacker / hostel
 9. Home of friend / relative
 10. Other - please specify _____

5. Where did you stay prior to arriving in the Mt Gambier region?
 1. My home
 2. Other - please specify town / location _____

6. Where did you stay / intend staying after you left the Mt Gambier region?
 1. My home
 2. Other - please specify town / location _____

7. For how many nights in total were you / will you be away from home on this trip?
 1. Same as my stay in Mt Gambier
 2. Other - please specify total trip duration _____

8. On this trip did you travel, or do you anticipate travelling, on the Great Ocean Road. Click the following link to see a map:http://www.questionpro.com/qp_userimages/sub-1/579026/Great-Ocean-Road-Map.pdf.
 1. Yes
 2. No

8. How did you travel to / around Mt Gambier? Select all that apply.
 1. Private car
 2. Rented car
 3. Bus / coach
 4. Airplane
 5. Other - please specify _____

10.1 Who did you travel with on this trip? Select all that apply if travelling with a tour group.

1. No one else
2. Partner / spouse
3. Family - incl. children
4. Adult family members
5. Friends
6. Tour group
7. Other - please specify _____

10.2 Including yourself, how many people were in your immediate travel group? Insert 0 if none.

	Number of persons
No. of persons 18 + years	<input type="checkbox"/>
No. of adolescents 15 to 17 years	<input type="checkbox"/>
No. of persons 14 years or less	<input type="checkbox"/>

11. Which of the following attractions did you visit in the Mt Gambier region? Select all that apply.

1. Blue Lake
2. Engelbrecht Cave
3. Princess Margaret Rose Cave
4. Riddoch Gallery
5. Umpherston Cave / Cave Garden
6. Valley Lake
7. None of the above

12. What activities did you participate in while in the Mt Gambier region? Select all that apply.

1. Boating / sailing
2. Bushwalking / hiking
3. Cycling
4. Diving
5. Farmers markets
6. Festivals / events
7. Fishing
8. Four wheel drive touring
9. Go to the beach / swimming
10. Golf
11. Museums / galleries
12. National / state parks / protected areas
13. Natural attractions (e.g. Blue Lake, caves)
14. Restaurants / cafes
15. Shopping for pleasure
16. Surfing
17. Theatre / performing arts
18. Wineries / cellar doors
19. None of the above
20. Other - please specify _____

13. From what sources did you obtain information about the Mt Gambier region, either before or after your arrival? Select all that apply.

1. Limestone Coast Visitor Guide
2. Government web sites e.g. southaustralia.com
3. Social media / forums e.g. Facebook, Twitter, Instagram, Youtube
4. Testimonial web sites - e.g. Tripadvisor.com
5. Online travel agents - e.g. Expedia, Wotif
6. Other websites
7. Apps for smartphones and tablet devices

8. Relatives / friends in Mt Gambier
9. Relatives / friends living elsewhere
10. Television programs, newspapers and other mass media
11. Other travel book, guide or brochure
12. Travel agents (shop front - not online)
13. Tourist office / Visitor Information Centre
14. None of the above
15. Other - please specify _____

14.1 Did you book any aspect of your visit to the Mt Gambier region & either before or after your arrival?

1. Yes
2. No

14.2 What elements of your trip did you book? Select all that apply.

1. Accommodation
2. Attraction
3. Restaurant
4. Tour group
5. Transport
6. Other - please specify _____

14.3 Through what channels did you book? Select all that apply.

1. Retail travel agent – (shopfront or by phone)
2. Online travel agent / portal
3. Airline / airline holiday program
4. Tour / coach operator
5. Visitor information centre
6. Other - please specify _____

15.1 How much did you spend, or do you anticipate spending, in the Mt Gambier region? Please estimate your spending for each of the categories below. Please include spending by yourself and other members of your 'family' group i.e. family and or friends travelling together. If you cant estimate your spending leave blank.

	\$A
Accommodation – incl. food and beverage included in the accommodation price	<input type="checkbox"/>
Food and beverage - restaurant/ cafes, groceries/ snacks, drinks, alcohol	<input type="checkbox"/>
Transport – fuel, taxis, car hire costs, airline, train, bus	<input type="checkbox"/>
Entertainment - tours/side trips, attraction entrance fees, movies, gambling	<input type="checkbox"/>
Shopping, gifts, souvenirs	<input type="checkbox"/>
Other – personal services, medical	<input type="checkbox"/>
TOTAL	<input type="checkbox"/>

15.2 How many people did this expenditure cover?

	No. of persons
Adults - 18 plus years	<input type="checkbox"/>
Adolescents - 15 to 17 years	<input type="checkbox"/>
Children 14 years or less	<input type="checkbox"/>

16. What did you enjoy most about your visit to Mount Gambier?

17. Did you have any unique, quirky or special experiences while in the Mt Gambier region that we could share (unattributed) via our blog and social media pages?

18. Was there anything you didn't enjoy about your visit to Mt Gambier?

19. What is your age?

1. 18 – 29 years
2. 30 – 39 years
3. 40 – 49 years
4. 50 – 59 years
5. 60 – 69 years
6. 70 or more years

20. What is your gender?

1. Female
2. Male

The following questions are designed to help us to understand how the Mt Gambier region is perceived by visitors and the types of experiences that are generally of interest to you. Your assistance in completing these final questions will be greatly appreciated.

21. In general, how important are the following experiences for you when considering a holiday destination in regional Australia?

	Not important	Slightly important	More important	Very important	No opinion
Adventure and excitement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoyment of food and wine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exploring and discovering new places and things	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
History and heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Luxury and indulgence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Markets and shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Museums and galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting local people / experiencing local culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nature and the natural environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to relax, reflect and rejuvenate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical challenge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality time with partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Socialising with friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. Which of the regional centres of Mt Gambier, Penola, Port Fairy and Warrnambool would you associate with the following descriptive phrases. You can pick all of them or none if there is no place you would associate with a particular characteristic.

	Mt Gambier	Penola	Port Fairy	Warrnambool	None of these
With rich history and heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With festivals and events I would like to attend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With a range of attractive accommodation options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With cellar doors & great food and wine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offering adventure and challenging activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With distinctive and usual natural attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Where I could relax and unwind	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would like to explore further	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. What is the likelihood that you will visit each of these places for a holiday or short break in the future?

	Very unlikely	Unlikely	Possibly	Likely	Very likely	No opinion
Mt Gambier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Penola	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Port Fairy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warrnambool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. Would you like to enter the prize draw for one of four \$500 gift vouchers?

1. Yes
2. No

Conditions: Four prizes are offered each consisting of a gift card valued at \$500. Only one entry will be accepted per person. The prize will be drawn at 5.30 pm 3rd April 2017 Australian Central Standard Time. The winners will be contacted directly by 5.00 pm the following day 4th April 2017.

QUESTIONS FOR AGENTS / DISTRIBUTORS

1. How would you describe your knowledge of the Mt Gambier region of South Australia as a travel destination?

Limited
Good
Excellent
2. What do you regard as the strengths of the Mt Gambier region as a travel destination?
3. What are the weaknesses?
- 4.1 What is the likelihood that you would recommend the Mt Gambier region to clients?

10 point rating scale.
- 4.2 Please comment on your ratings.
- 4.3 In what circumstances are you likely to recommend Mt Gambier to clients?
5. To what extent is Mt Gambier product represented in the inbound wholesale programs you work with?
6. To what extent is Mt Gambier product represented in the domestic wholesale programs you work with?
7. Are there opportunities to improve the representation of product from the Mt Gambier region within the distribution network?

Yes
No

If Yes – please comment.
8. Are there particular products that Tourism Mt Gambier should focus on for its product development activities?

Please comment.
9. Are there particular markets that Tourism Mt Gambier should focus on for its marketing activities?

Please comment.

QUESTIONS FOR INDUSTRY STAKEHOLDERS

1. In your opinion what is the one key experience that attracts visitors and differentiates the Mt Gambier region from other parts of South Australia / Western Victoria?

Open ended response – comment box.

2. Would the key experience the region offers differ for intrastate, interstate and / or international visitors?

Yes - Please comment.

No

3. More broadly, what do you regard as the other key strengths of the region as a tourism destination?

4. How would you rate the tourism experiences on offer in the Mt Gambier region?

	Poor	Average	Good	Very good	Can't comment
Adventure, activity & sport e.g. fishing, surfing, diving, golf, adventure hiking.	1	2	3	4	5
Food and wine e.g. cellar doors, restaurants, cafes, markets, farm based product.	1	2	3	4	5
Heritage and culture e.g. museums, galleries, Aboriginal, historical sites etc.	1	2	3	4	5
Nature based e.g. National parks, natural attractions, native animals, bushwalking, bird watching, flora and fauna.	1	2	3	4	5

Where applicable, please comment on your ratings – particularly if you have a rating of 'poor' for any category. Please identify the category your comments relate to.

5. How would you rate the tourism product and services in the Mt Gambier region within each of the following categories.

	Poor	Average	Good	Very good	Can't comment
Accommodation	1	2	3	4	5
Attractions	1	2	3	4	5
Conventions, conferences and meetings	1	2	3	4	5
Tour and transport operators	1	2	3	4	5
Festivals and events	1	2	3	4	5
Hire services	1	2	3	4	5

Where applicable, please comment on your ratings – particularly if you have a rating of 'poor' for any category. Please identify the category your comments relate to.

6. Do you believe there are any product gaps or weaknesses that the tourism industry in the Mt Gambier region that Tourism Mt Gambier should focus on as a priority?

Yes - Please comment.

No

7. Are there any product strengths that the region possesses that could be better exploited/promoted?

Yes - Please comment.

No

8. Are there any gaps or weaknesses regarding key public infrastructure that affect the competitiveness of the tourism industry in the Mt Gambier region?

Yes - Please comment.

No

9. Do you have any comments on the distribution channels available to tourism operators in the Mt Gambier region – including online booking systems, online portals and visitor information centres.

Yes - Please comment.

No

10. Do you have any other comments regarding tourism product in the Mt Gambier region?

11. Which of the following categories best describes your business activity?

Tourism operator – accommodation

Tourism operator – attraction

Tourism operator – tour or transport

Travel agent

Visitor Information Centre

Festival or event

Government agency / Industry board

Other – please specify

Melissa Telford

From: Hans Gerber <hans@minale.com.au>
Sent: Thursday, 13 July 2017 2:59 PM
Subject: Mount Gambier document latest issue H and presentation

Hi Simon

Please find below the link to issue H. I will not change anything from here on.

<https://www.dropbox.com/sh/ef653rwrpvax9wx/AAC5wzJeJfOWIzXndFSUA4eBa?dl=0>

Click on the link and then click on document. Select download then direct download and open. This process may take a few minutes.

Regards,
Hans

Hans Gerber | Principal

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