CITY OF WYNDHAM TOURISM RESEARCH

SURVEY SUMMARY REPORT

NOVEMBER 2018 **CITY OF WYNDHAM**

Urban Enterprise Urban Planning / Land Economics / Tourism Planning / Industry Software

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This report was commissioned by Wyndham City Council's Economic Growth and Tourism Department.

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ACRONYMS

LGA– Local Government Area

TRA – Tourism Research Australia

IVS– International Visitor Survey

NVS – National Visitor Survey

VFR – Visiting Friends and Relatives

GLOSSARY OF TERMS

Domestic day trip visitors – Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic overnight visitors – People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

International visitor – A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

EXECUTIVE SUMMARY

INTRODUCTION

Urban Enterprise was commissioned by the Wyndham City Council's Economic Growth and Tourism Department to compile various survey data results from three key sources. Surveys include Tourism Research Australia (TRA) National Visitor Survey (NVS) and International Visitor Survey (IVS), Destination Melbourne Survey (includes Community Survey and Visitor Survey) and City of Wyndham Industry Survey. All surveys were designed and administered by external parties.

VISITATION KEY FINDINGS

Visitation to Wyndham has grown substantially, doubling between 2008 and 2017. All markets (domestic daytrip, overnight and international overnight) have grown in real terms, however, growth in domestic daytrips has largely driven the significant increase in visitation.

International visitation has increased as a proportion of total visitation, growing from 2.7% of total visitation in 2008 to 5.3% in 2017.

Both domestic overnight and international overnight visitation increased between 2008 and 2017. Whilst attracting all markets to the City of Wyndham is important for economic development, overnight visitors tend to spend more in the local economy compared to daytrip visitors.

Wyndham attracts a high proportion of repeat visitors, which is likely a result of the high proportion of people visiting friends and relatives, proximity to major population centres (Melbourne) and attractions and tourism product.

VISITORS REASON FOR VISIT

Visiting Friends and Relatives (VFR) is a clear driver of visitation to Wyndham. As the resident population continues to increase through urban development, so too will growth in this market. Growth in residents born overseas will also increase the number of international visitors to the City of Wyndham visiting friends and family.

There was growth in the proportion of holiday visitors to Wyndham for both the domestic daytrip and international visitor markets between 2014-15 to 2016-17. The business market was a key area of growth for domestic overnight visitors, with the proportion of holiday overnight visitors remaining the same.

INTERNATIONAL COUNTRY OF ORIGIN

Wyndham's International visitors are unique in that a significantly higher proportion of international visitors to Wyndham were from India (25%), compared to visitors to Western Melbourne (11%) and Melbourne (5%). This is likely driven by the high number of people visiting family and friends of Indian born residents living in the City of Wyndham. The proportion of visitors from China decreased relative to other international markets between 2014-15 and 2016-17 (from 11% to 7%), which although in line with the Western Melbourne proportion, was lower than the 22% of Chinese visitors to Melbourne as a whole. The growth in Indian visitors is a key opportunity for Wyndham in terms of potential take up and patronage of tourism product and activities in the region. The Chinese visitor market can also be further leveraged off the back of growth in visitation to Melbourne. This may include increased marketing to the Chinese market and Chinese language friendly tourism attractions and product.

DOMESTIC VISITOR MARKET ORIGIN

For domestic overnight visitors, there was a noticeable increase in the proportion of visitors from Queensland increasing from 7% in 2014-15 to 16% in 2016-17. This could potentially be as a result of the introduction of direct flights from the Gold Coast to Avalon Airport in late 2015. The growth in domestic arrivals through Avalon Airport as well as future international arrivals through AirAsia X will provide a significant opportunity for tourism growth in the City of Wyndham.

VISITOR ACTIVITIES

The activity profile of visitors shows that a lower proportion of domestic daytrip and overnight visitors ate or dined out as part of their visit compared to visitors to Melbourne and Western Melbourne. This may indicate opportunity to increase visitor patronage to existing cafes and restaurants or opportunity for new food and wine product in the region.

Nature based assets and attractions (parks/zoos/aquariums) are highlighted as a key strength in the Visitor Survey results. Existing nature-based tourism assets could potentially be further leveraged through product development and promotion to increase patronage.

COMMUNITY RESPONDENTS FINDINGS

Community survey results indicated that hosting visitors is relatively frequent amongst residents, with 79% of respondents having had visitors stay with them previously, and over half of these having hosted visitors within the last three months.

Favourite activities of Community Survey respondents showed a clear link to nature-based activities, including outdoor recreation.

For visitors that stayed with local hosts in the City of Wyndham, Community Survey results show that VFR visitors stay for longer than other types of visitors and key activities include eating out at local restaurants, shopping and sightseeing.

INDUSTRY SURVEY FINDINGS

Industry Survey respondents indicated positive industry outlook, with over half (67%) of businesses surveyed indicating that they expected their revenue to grow over the next year, and 12% of business identifying that they saw economic growth and industry growth respectively as current major business opportunities.

Businesses reported that there had generally been an increase in the number of visitors from all markets (i.e. locals, metro Melbourne, interstate and overseas), indicating ongoing growth in patronage from visitor markets, supporting growth and investment in the tourism business sector.

A high proportion of businesses utilised social media to promote their business (83% of respondents). Almost 50% of businesses also indicated having paid for advertising on social media. The high level of business engagement with social media indicates the growing market preference for accessing information online as well as the ability for businesses to engage directly with their markets.

There may be opportunity for tourism businesses in Wyndham to improve online booking capacity, with 61% of respondents indicating they do not have instant online booking capability. There may also be opportunity for greater packaging of attractions and tourism product, with only 25% of businesses packaging their product offer with other businesses.

1. INTRODUCTION AND BACKGROUND

1.1. OVERVIEW

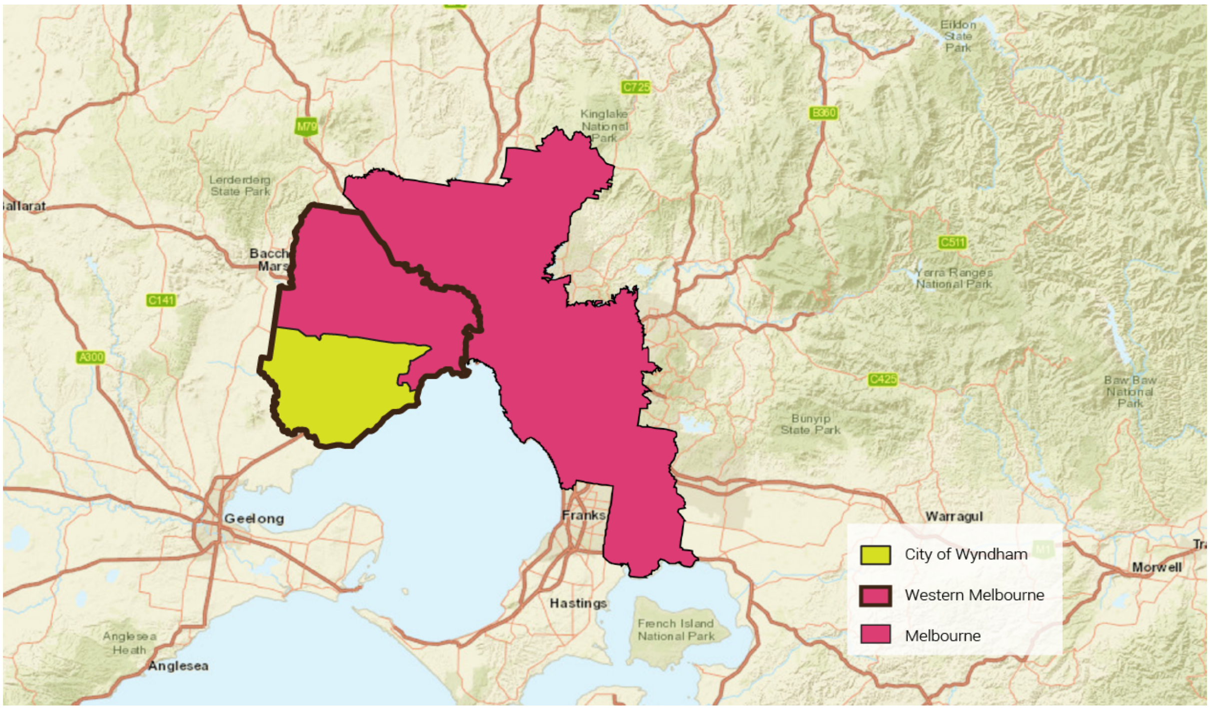
The following report has been prepared by Urban Enterprise for the City of Wyndham.

The report provides an overview of visitation, visitor markets and tourism business based on the results of three surveys. These surveys were prepared and administered by external parties, with Urban Enterprise providing collation of the data.

Surveys include:

- Tourism Research Australia's (TRA): National Visitor Survey (NVS) and International Visitor Survey (IVS) data for the City of Wyndham (**Wyndham**), benchmarked with the Western Melbourne region (**Western Melbourne**) and metropolitan Melbourne (**Melbourne**) (as shown in Figure 1);
- Destination Melbourne: Community and Visitor Perceptions Survey including community (**Community Survey**) and visitor (**Visitor Survey**) subsets; and
- City of Wyndham: Visitor Economy Industry Survey (**Industry Survey**).

FIGURE 1 DATA REGIONS



Source: Tourism Research Australia, 2017 – edited by Urban Enterprise

1.2. SURVEY DATA SOURCES

The report includes collation of survey data from three sources, Tourism Research Australia, Destination Melbourne and the City of Wyndham. This is outlined further below.

1.2.1. TOURISM RESEARCH AUSTRALIA DATA

NATIONAL VISITOR SURVEY DATA

Overview

The National Visitor Survey (NVS) commenced in January 1998. The aim of the survey is to gather data relating to the demographics, travel behaviour and attitudes of Australian residents towards tourism and to monitor changes and trends in these characteristics. In 2014 TRA introduced mobile phone interviewing where half of the sample are interviewed on mobile phones. This has changed some of the travel characteristics in the time series and data from 2014 onwards should be used with caution when comparing with earlier results.

Collection

The NVS is collected via a Computer Assisted Telephone Interview (CATI) and has an annual quota of 120,000 interviews (60,000 landline and 60,000 mobile).

Limitations

The NVS has the following limitations:

- Respondents are 15 years of age or over
- Overnight – a trip where they stayed a night at least 40km from home.
- Daytrips - a round trip of at least 50km from home where they did not stay overnight at the destination.

INTERNATIONAL VISITOR SURVEY

Overview

The International Visitor Survey (IVS) represents the most comprehensive source of information on international visitors to Australia. It has been operating since the early 1970s and is jointly funded by the Commonwealth, State and Territory Governments under the guidance of the Australian Standing Committee on Tourism (ASCOT).

Collection

Every year, the International Visitor Survey samples 40,000 departing, short-term international travellers aged 15 years and over who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports; Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast. Prior to 2005 the sample size was 20,000 per year. There are currently 8,000 interviews conducted in Mandarin, Japanese and Korean each year.

Limitations

The IVS has the following limitations:

- Respondents are 15 years of age or over;
- Overseas visitors coming to Australia for a period of less than twelve months
- International visitors departing by sea are not interviewed; however they comprise less than 1% of the total visitors to Australia.
- TRA is unable to interview visitors in airline business lounges. Further research conducted by TRA suggests that this has little to no effect on the estimates.

Sample sizes

Due to the IVS being a sample survey TRA recommends the use of data with a sample of 40 persons or greater.

AUSTRALIAN STATISTICAL GEOGRAPHY STANDARD (ASGS) CHANGES

Data prior to 2016 presented in this report may differ to that presented in the previous years 'City of Wyndham Tourism Research' report as 2016 Australian Statistical Geography Standard (ASGS) changes to SA2 regions have now been implemented by TRA. As a result, some SA2 data collection boundaries have shifted, which may have resulted in some visitation not being accurately attributed to new smaller SA2 regions.

1.2.2. DESTINATION MELBOURNE DATA

Destination Melbourne's Community and Visitor Perceptions Survey was conducted as part of Wyndham City's partnership with Destination Melbourne. Results were filtered for the City of Wyndham to those who had visited Werribee, Point Cook, Tarneit or Hoppers Crossing for the **Visitor Survey**; and to those who lived within the Wyndham LGA for the **Community Survey**. Survey responses for both the visitor and community surveys were collected between April and June 2018. The **Visitor Survey** elicited 1184 total responses, and the **Community Survey** collected 2423 responses.

Limitations

It should be noted that respondents to the **Visitor Survey** were heavily weighted towards females (95%) to males (5%), which may influence some survey results.

75% of respondents to the **Community Survey** were born in Australia. This is at odds with the resident population of Wyndham, with the ABS (2016) showing that 47% of residents are born overseas. The results therefore may be skewed toward Australian born residents in the City of Wyndham.

1.2.3. CITY OF WYNDHAM DATA

The City of Wyndham's Visitor Economy Industry Survey (**Industry Survey**) was an online survey of local businesses conducted by Council between April and May of 2018 and elicited 36 total responses.

2. VISITOR PROFILE

The following section provides a visitor profile for the City of Wyndham, including a summary of visitation and key visitor demographics across domestic daytrip, domestic overnight and international markets, utilising **TRA data** and data from the **Visitor Survey** and **Community Survey**.

TRA Data is presented as both year on year visitation, and 2-year average visitation, which provides a more statistically reliable sample size. Year on year visitation numbers should be used as a guide only due to low sample sizes for both domestic daytrip and overnight visitation, which may have resulted in the large variations present in visitation numbers.

2.1. VISITATION TRENDS

Tables 1 and 2 provide an overview of visitation to Wyndham over the last decade, with Figures 2, 3, 4 and 5 overleaf illustrating the key visitation trends. Overall, in 2017 Wyndham attracted just over 1 million total visitors, of which just over 760,000 were daytrip visitors (75%). Domestic overnight visitors comprised just under 200,000 visitors (20%), and international just over 50,000 (5%).

Overall, both year on year visitation and 2-year average visitation shows an increase in total visitation, suggesting growth in the visitor economy.

It should be noted that TRA data is likely to underestimate overnight visitation to the City of Wyndham given the limitations of the data as noted in Section 1.2.1.

TABLE 1 VISITATION TO THE CITY OF WYNDHAM (YEAR ON YEAR)

	DOMESTIC OVERNIGHT VISITORS	DOMESTIC DAYTRIP VISITORS	INTERNATIONAL TRIPS	TOTAL
2008	142,948	337,620	13,324	493,892
2009	104,222	851,602	14,343	970,166
2010	111,946	520,259	16,514	648,719
2011	163,174	593,275	26,285	782,734
2012	244,243	938,836	28,930	1,212,010
2013	216,421	857,600	35,992	1,110,013
2014	207,197	609,212	31,521	847,930
2015	195,811	760,632	6,678	1,003,121
2016	208,401	884,731	44,578	1,137,711
2017	199,972	763,534	53,992	1,017,499

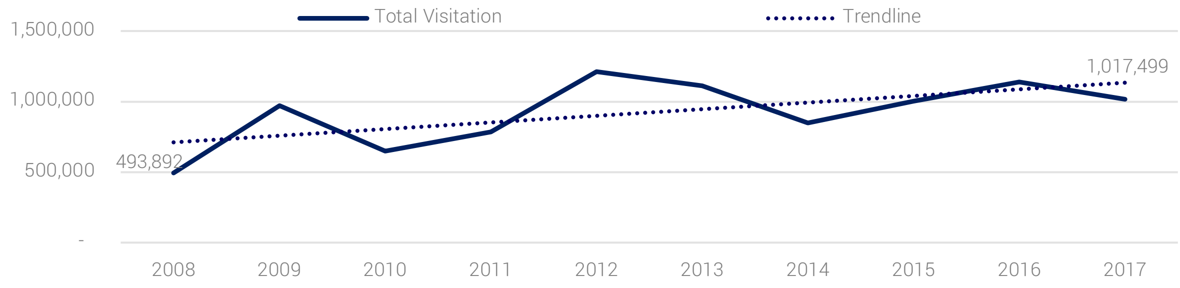
Source: Tourism Research Australia – NVS and IVS – 2008-2017 – compiled by Urban Enterprise, 2018

TABLE 2 VISITATION TO THE CITY OF WYNDHAM (2 YEAR AVERAGE)

	DOMESTIC OVERNIGHT VISITORS	DOMESTIC DAYTRIP VISITORS	INTERNATIONAL TRIPS	TOTAL
2008-2009 (average)	123,585	594,611	13,833	732,029
2010-2011 (average)	137,560	556,767	21,399	715,726
2012-2013 (average)	230,332	898,218	32,461	1,161,011
2014-2015 (average)	201,504	684,922	39,099	925,525
2016-2017 (average)	204,187	824,133	49,285	1,077,605

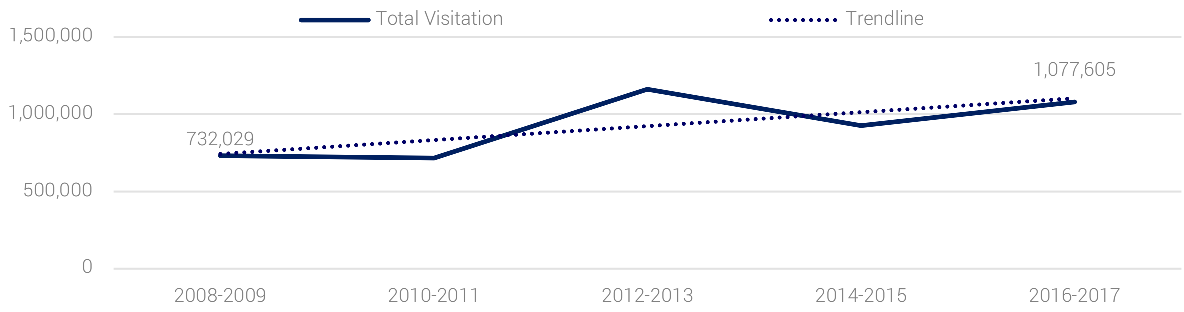
Source: Tourism Research Australia – NVS and IVS – 2008-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

FIGURE 2 TOTAL VISITATION TO THE CITY OF WYNDHAM (YEAR ON YEAR)



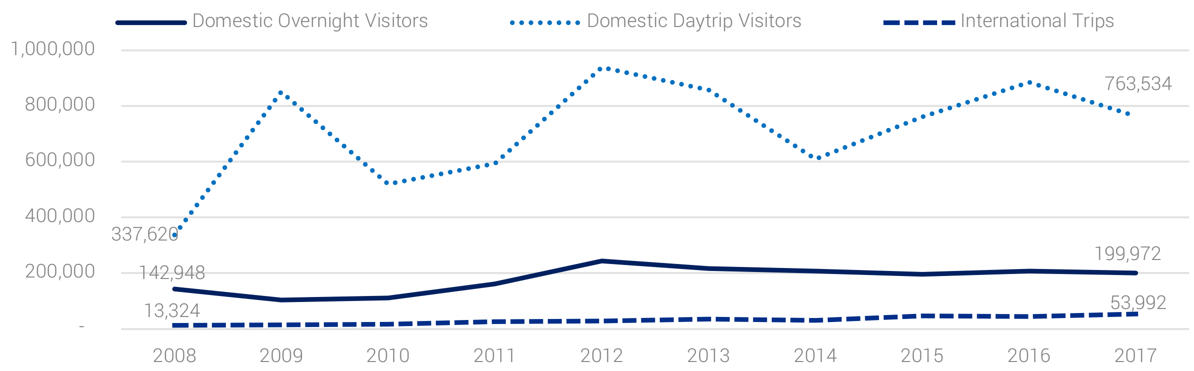
Source: Tourism Research Australia – NVS and IVS – 2008-2017 – compiled by Urban Enterprise, 2018

FIGURE 3 TOTAL VISITATION TO THE CITY OF WYNDHAM (2 YEAR AVERAGE)



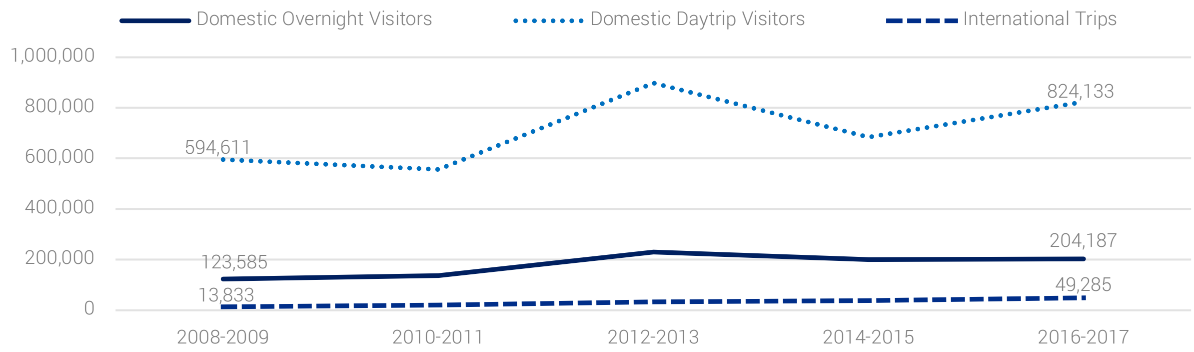
Source: Tourism Research Australia – NVS and IVS – 2008-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

FIGURE 4 VISITATION TO THE CITY OF WYNDHAM – SUB MARKETS (YEAR ON YEAR)



Source: Tourism Research Australia – NVS and IVS – 2008-2017 – compiled by Urban Enterprise, 2018

FIGURE 5 VISITATION TO THE CITY OF WYNDHAM – SUB MARKETS (2 YEAR AVERAGE)



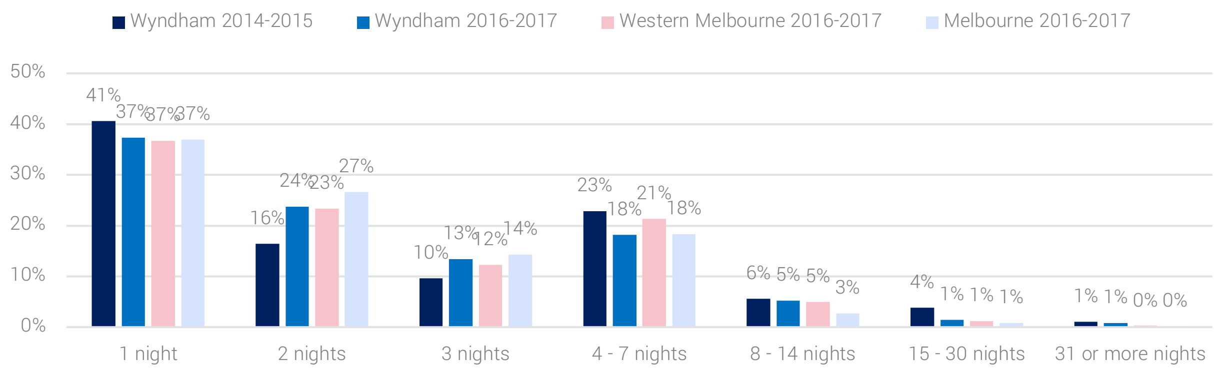
Source: Tourism Research Australia – NVS and IVS – 2008-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

2.1.1. LENGTH OF STAY

DOMESTIC OVERNIGHT VISITORS

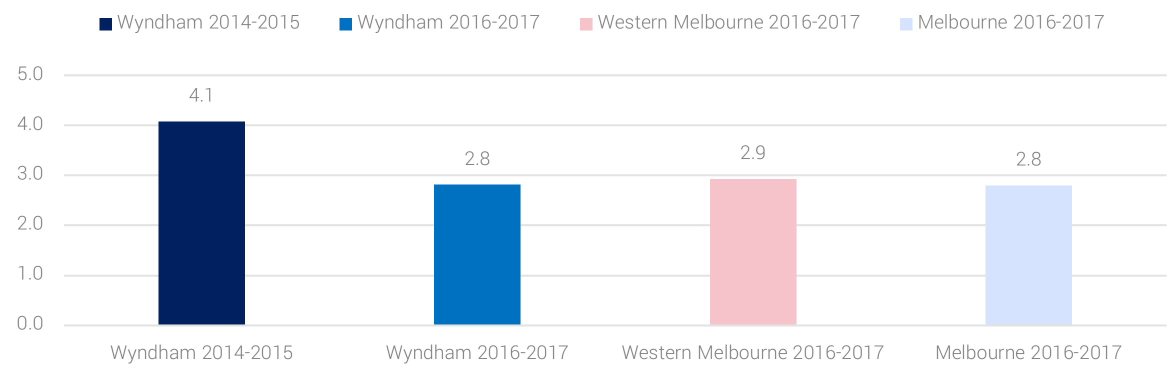
The largest share of domestic overnight visitors to Wyndham in 2016-17 stayed only 1 night in the region (37%) (Figure 6), with the average length of stay across all visitors being 2.8 nights (Figure 7), which aligned to the average length of stay for visitors to Western Melbourne and Melbourne in the same period.

FIGURE 6 DOMESTIC OVERNIGHT VISITORS – LENGTH OF STAY IN REGION



Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

FIGURE 7 DOMESTIC OVERNIGHT VISITORS–AVERAGE LENGTH OF STAY (NIGHTS)

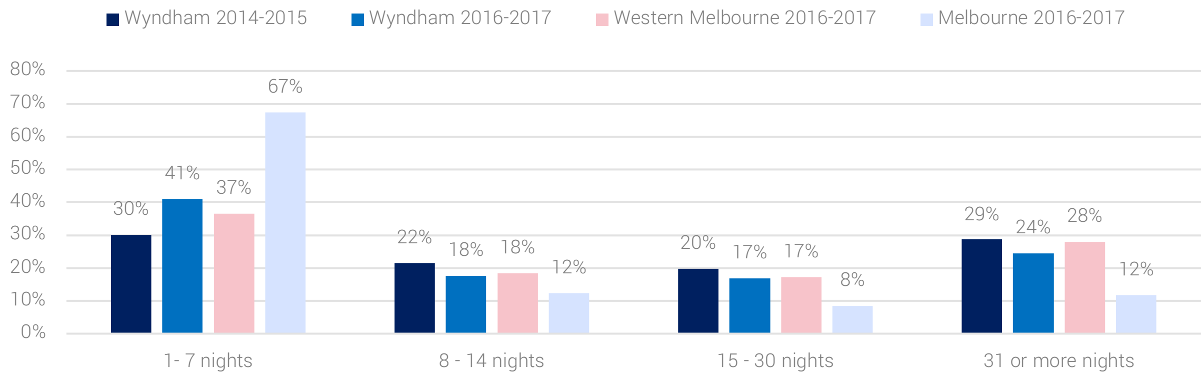


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

INTERNATIONAL VISITORS

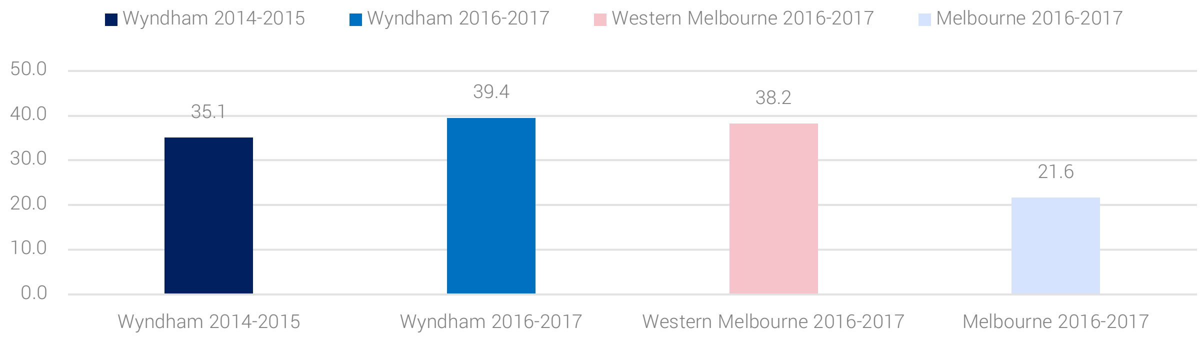
In 2016-17, the highest proportion of international visitors to Wyndham stayed between 1 and 7 nights (41%) (Figure 8), with an average length of stay across all visitors of 39.4 nights (Figure 9). The high average length of stay for international visitors likely reflects working and studying visitors as well as those staying with friends and relatives for extended periods of time. This average is also consistent with that across Western Melbourne and Melbourne.

FIGURE 8 INTERNATIONAL VISITORS – NUMBER OF NIGHTS STAY



Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

FIGURE 9 INTERNATIONAL VISITORS–AVERAGE LENGTH OF STAY (NIGHTS)



Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

2.1.2. RETURN VISITATION

The Visitor Survey found that 83% of respondents had previously visited Werribee, Point Cook, Tarneit or Hoppers Crossing. The City of Wyndham is likely to attract a high proportion of repeat visitation given its proximity to major source markets including Melbourne, and regional cities including Geelong and Ballarat. The City of Wyndham would also have a high propensity to attract repeat visitation due to people visiting friends and relatives and conducting business in the region.

FIGURE 10 PREVIOUS VISITATION

Source: Wyndham Visitor Survey – Q: Have you visited Werribee, Point Cook, Tarneit or Hoppers Crossing? Compiled by Urban Enterprise, 2018. N= 2421

2.1.3. VISITATION KEY FINDINGS

Overall, visitation to Wyndham has grown substantially, with total visitation for 2017 more than doubling that of 2008. However, this growth has not been steady, experiencing distinct peaks and troughs. Domestic daytrip visitation and international visitation have experienced the highest growth, with each more than doubling in visitor numbers since 2008, whereas domestic overnight visitation has experienced a lower total growth by proportion. It is also likely that the TRA underestimates visitation due to the limitations of the survey data as discussed in Section 1.2.1. This includes only counting daytrip visitors if it is a round trip of at least 50km and only counting overnight trips if visitors stay at least 40km from home.

The average Length of stay for domestic visitors to Wyndham decreased from 2015-15 to 2016-17 from 4.1 nights to 2.8 nights, influenced by a lower proportion of visitors staying 4 nights or more. Wyndham's average length of stay for 2016-17 was in line with the Melbourne average.

The Visitor Survey results showed a high proportion of return visitors to Wyndham, likely driven by the proximity of Wyndham to large source markets and VFR visitation.

2.2. VISITOR DEMOGRAPHICS

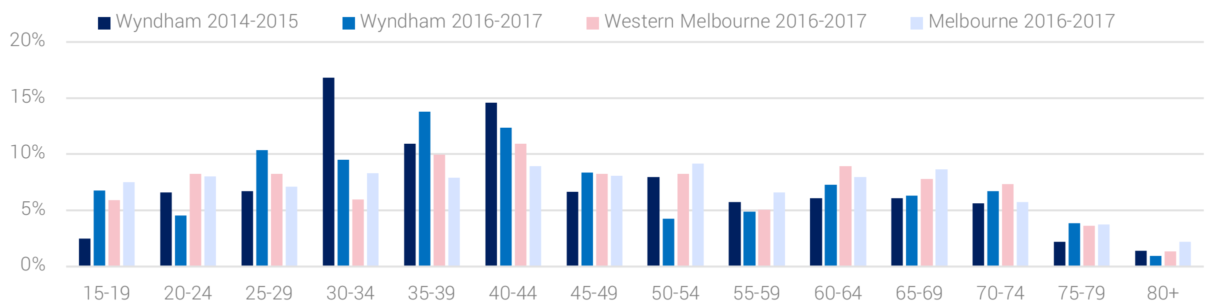
The following provides an overview of the key demographics of domestic daytrip, domestic overnight and international visitors to Wyndham, as compared to Western Melbourne and Melbourne where available.

2.2.1. AGE PROFILE

DOMESTIC DAYTRIP VISITORS

The City of Wyndham attracted a high proportion of visitors aged between 25-44 years, with a noticeable difference in the proportion of visitors in the 35-39 year age brackets in 2016-2017, when compared to Western Melbourne and Melbourne.

FIGURE 11 DOMESTIC DAYTRIP VISITORS – AGE PROFILE

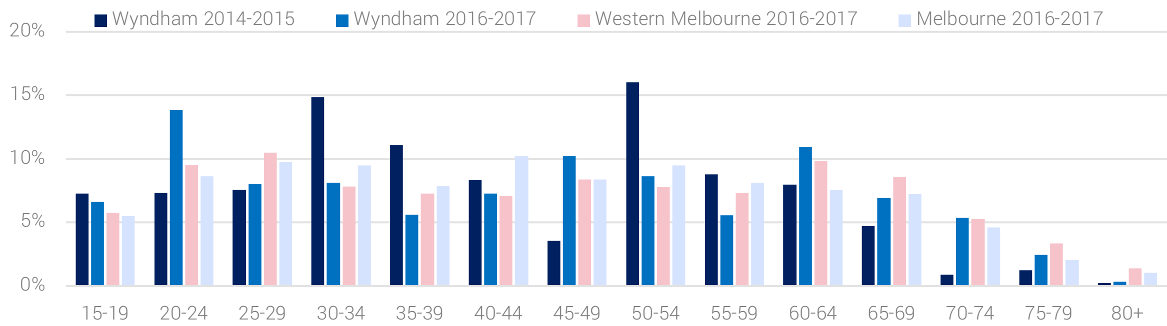


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

DOMESTIC OVERNIGHT VISITORS

The 2016-17 profile of overnight visitors to Wyndham was more varied than the daytrip profile, with the largest single age group being those aged 20-24 years (14%), followed by those aged 60-64 (11%) (Figure 12). There was a noticeable increase in the proportion of visitors aged between 20 and 24 years. A potential reason for this could include an increase in the proportion of students.

FIGURE 12 DOMESTIC OVERNIGHT VISITORS – AGE PROFILE

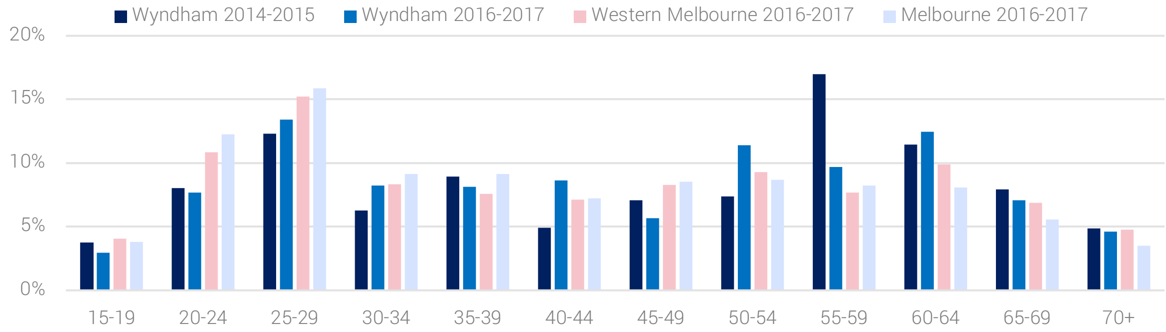


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

INTERNATIONAL VISITORS

For international visitors to Wyndham in 2016-17, the largest share of visitor by single age group was those aged 25-29 years (13%), there was also a high proportion of visitors from the 50-54 years (11%) and 60-64 years (12%) age brackets.

FIGURE 13 INTERNATIONAL VISITORS – AGE PROFILE

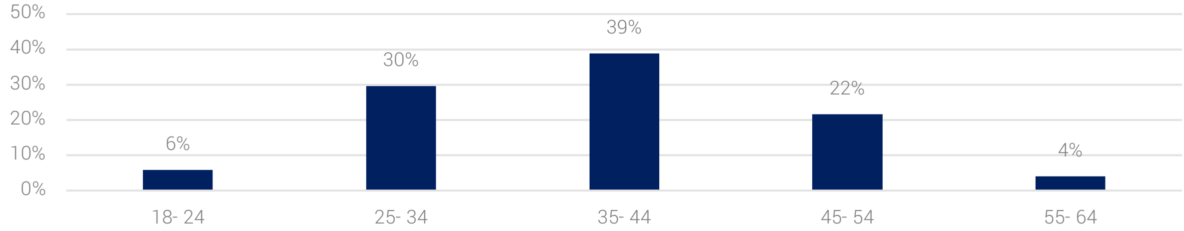


Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

VISITOR SURVEY

The majority of **Visitor Survey** respondents were aged 35-44 years (39%), followed by 24-34 years (30%) and 45-54 years (22%) (Figure 14).

FIGURE 14 AGE PROFILE



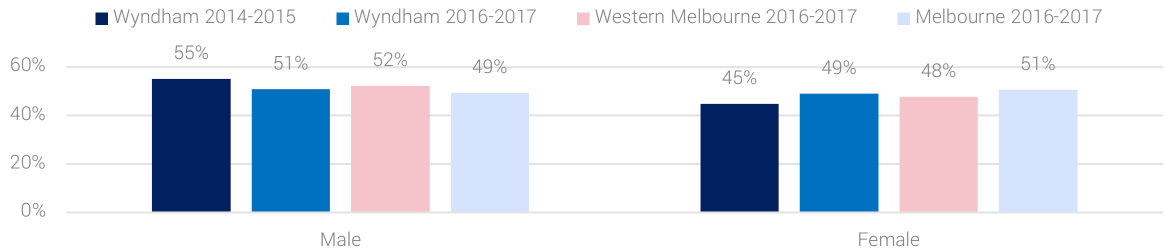
Source: Wyndham Visitor Survey – Q: What is your age? Compiled by Urban Enterprise, 2018.

N= 2405

2.2.2. GENDER

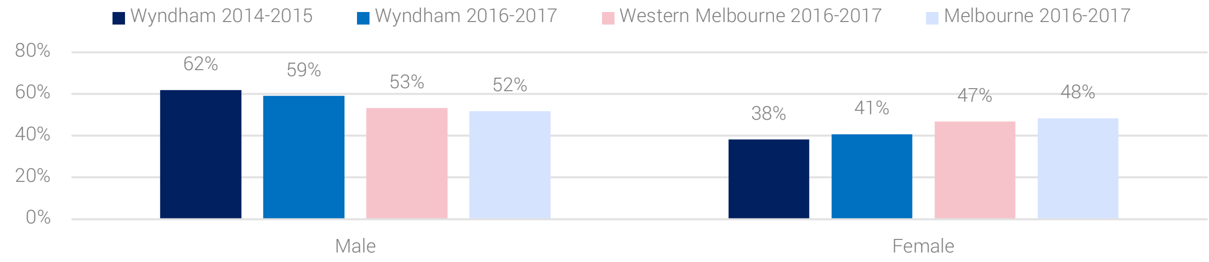
For both domestic daytrip and overnight visitors to Wyndham, the proportion of male visitors was slightly higher than females (Figures 15 and 16), while for international visitors the proportion of female visitors was higher (Figure 17). Of **Visitor Survey** respondents, the vast majority were female respondents (95%), with males only accounting for 5% of respondents.

FIGURE 15 DOMESTIC DAYTRIP VISITORS – GENDER



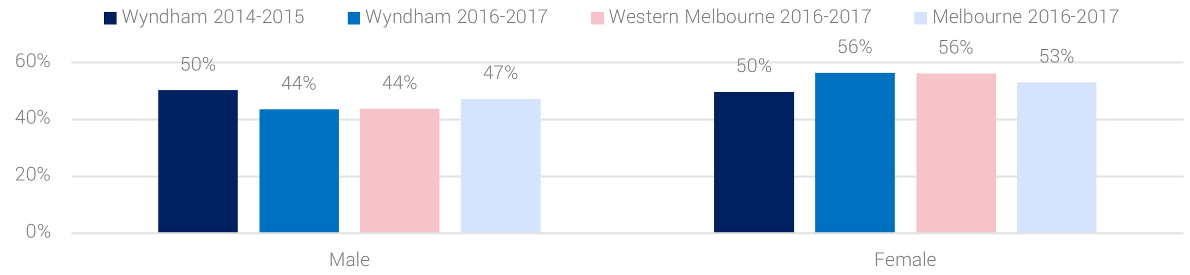
Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

FIGURE 16 DOMESTIC OVERNIGHT VISITORS – GENDER OF VISITORS



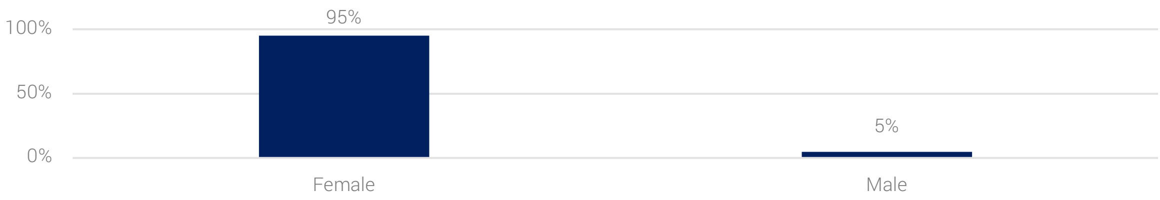
Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

FIGURE 17 INTERNATIONAL VISITORS – GENDER



Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

FIGURE 18 VISITOR GENDER



N= 2415

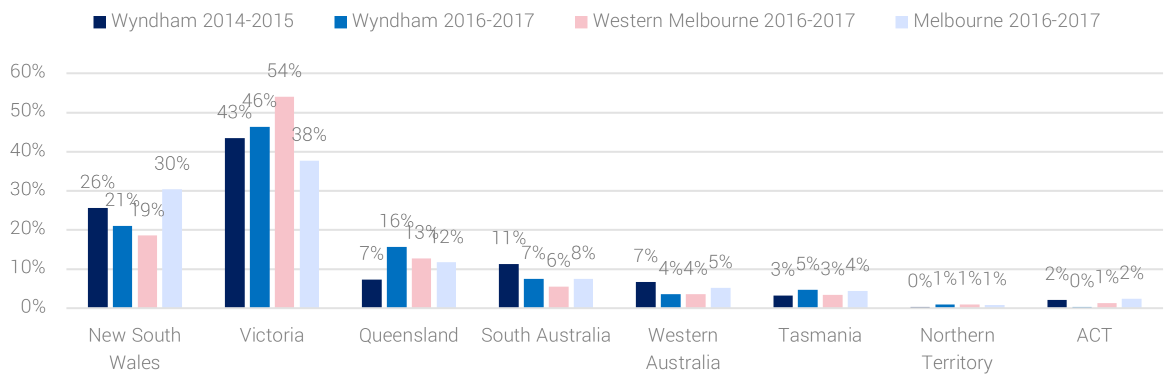
Source: Wyndham Visitor Survey – Q: What is your gender? Compiled by Urban Enterprise, 2018.

2.2.3. ORIGIN

DOMESTIC OVERNIGHT VISITORS

In 2016-17, domestic overnight visitors to Wyndham were primarily from Victoria (46%), followed by New South Wales (21%), Queensland (16%) and South Australia (7%) (Figure 19).

FIGURE 19 DOMESTIC OVERNIGHT VISITORS – HOME STATE



Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

INTERNATIONAL VISITORS

In 2016-2017, a quarter of all international visitors were from India (25%), followed by New Zealand (22%), as shown in Table 3.

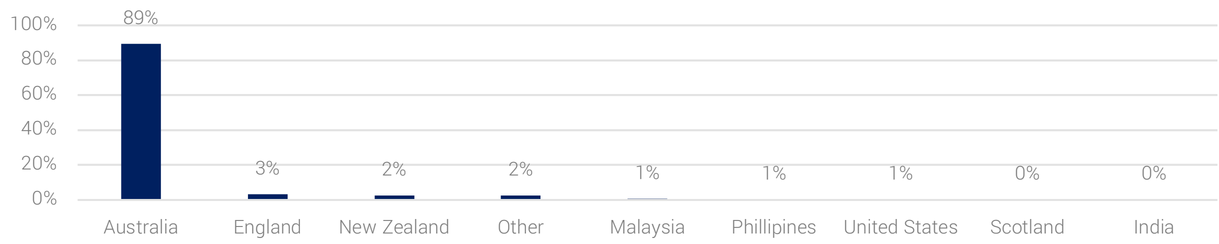
TABLE 3 INTERNATIONAL VISITORS – COUNTRY OF RESIDENCE

	WYNDHAM 2014-2015	WYNDHAM 2016-2017	WESTERN MELBOURNE 2016-2017	MELBOURNE 2016-2017
India	13%	25%	11%	5%
New Zealand	24%	22%	19%	12%
Other Countries	7%	8%	8%	5%
Other Asia	7%	7%	12%	4%
United Kingdom	8%	7%	6%	8%
China	11%	7%	8%	22%
Malaysia	7%	4%	5%	5%
Singapore	4%	4%	3%	5%
United States of America	2%	3%	7%	8%
Hong Kong	2%	2%	2%	4%
Other Europe	2%	2%	5%	3%
Indonesia	6%	2%	1%	2%
Japan	0%	1%	1%	2%
Canada	1%	1%	2%	2%
Taiwan	1%	1%	2%	2%
France	1%	1%	1%	2%
Germany	0%	1%	2%	3%
Thailand	2%	1%	1%	1%
Italy	1%	1%	2%	1%
Korea	0%	1%	1%	2%
Netherlands	0%	1%	0%	1%
Scandinavia	0%	0%	0%	1%
Switzerland	0%	0%	0%	1%

Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

Of **Visitor Survey** respondents, 89% were born in Australia. Only a small portion of the survey respondents were international visitors (11%) of these, England (3%) and New Zealand (2%) were the most common countries of origin (Figure 20).

FIGURE 20 VISITOR ORIGIN BY %



Source: Wyndham Visitor Survey – Q: Which country were you born in? Compiled by Urban Enterprise, 2018.

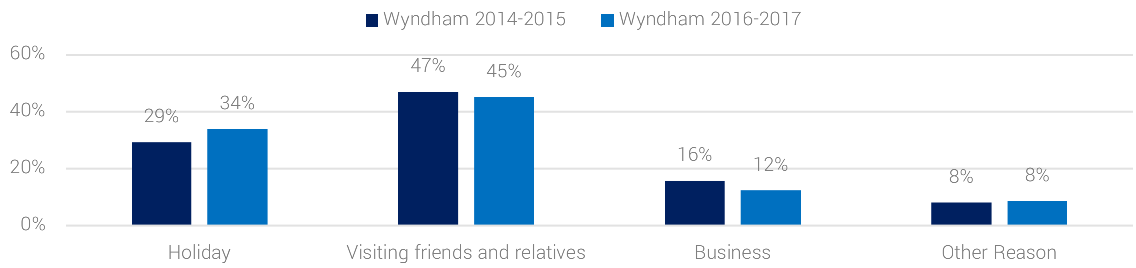
N= 2377

2.2.4. PURPOSE OF VISIT

ALL VISITORS

Of all visitors to Wyndham in 2016-2017, the largest share were visiting friends and relatives (45%), followed by those on a holiday (34%) (Figure 21).

FIGURE 21 ALL VISITORS TO THE CITY OF WYNDHAM - REASON FOR STOPOVER

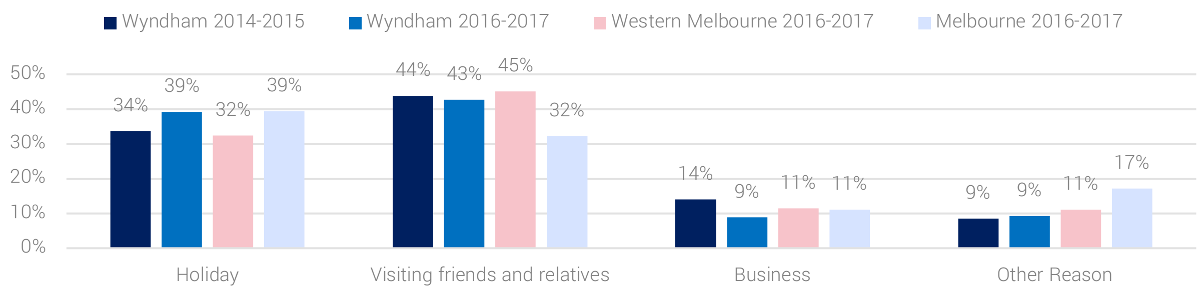


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018. Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attending a funeral, transit.

DOMESTIC DAYTRIP VISITORS

Visiting friends and relatives comprised the highest proportion of domestic daytrip visitors to Wyndham in 2016-17 (43%), followed by holiday visitors (34%) (Figure 22).

FIGURE 22 DOMESTIC DAYTRIP VISITORS – REASON FOR STOPOVER

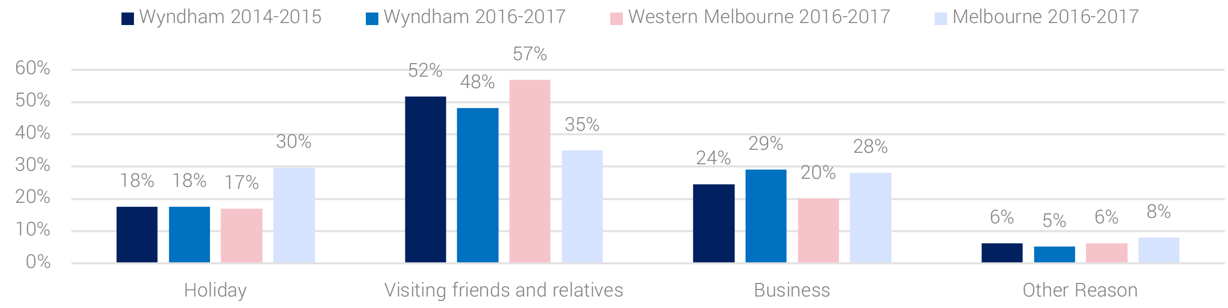


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018. Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attend a funeral.

DOMESTIC OVERNIGHT VISITORS

For domestic overnight visitors, visiting friends and relatives also comprised the highest share of visitors (48%), followed by business visitors (29%) (Figure 23).

FIGURE 23 DOMESTIC OVERNIGHT VISITORS – REASON FOR STOPOVER

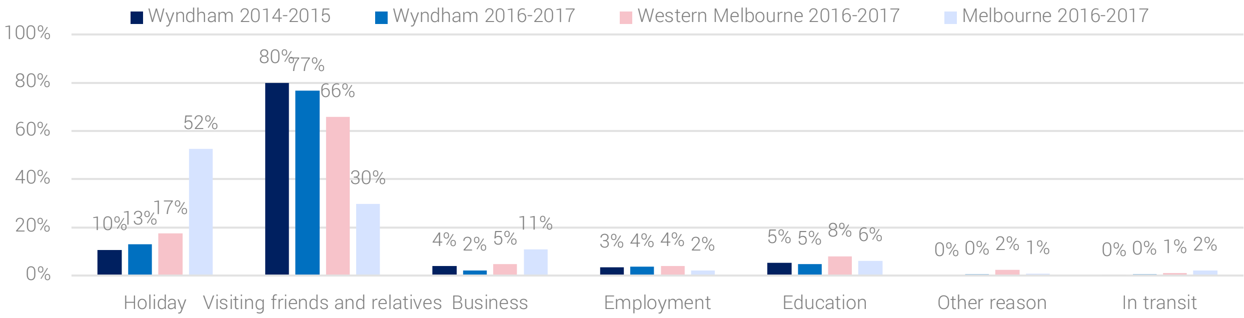


Source: Tourism Research Australia – NVS – 2008-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018. Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attending a funeral.

INTERNATIONAL VISITORS

The vast majority of international visitors to Wyndham were visiting friends and relatives (77%) (Figure 24).

FIGURE 24 INTERNATIONAL VISITORS – REASON FOR STOPOVER



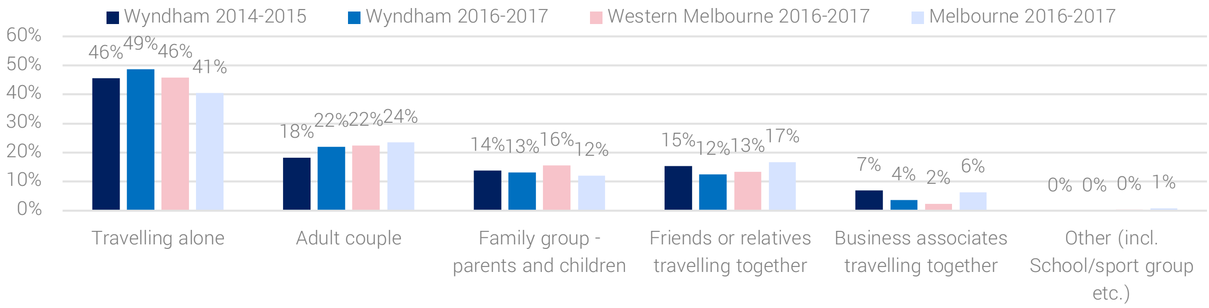
Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

2.2.5. TRAVEL PARTY

DOMESTIC OVERNIGHT VISITORS

Of domestic visitors to Wyndham in 2016-17, 49% were travelling alone (Figure 25), aligning to the results for western Melbourne and Melbourne. Adult Couples were the second most prominent travel party type, followed by family groups and friends and relatives.

FIGURE 25 DOMESTIC OVERNIGHT VISITORS – TRAVEL PARTY TYPE

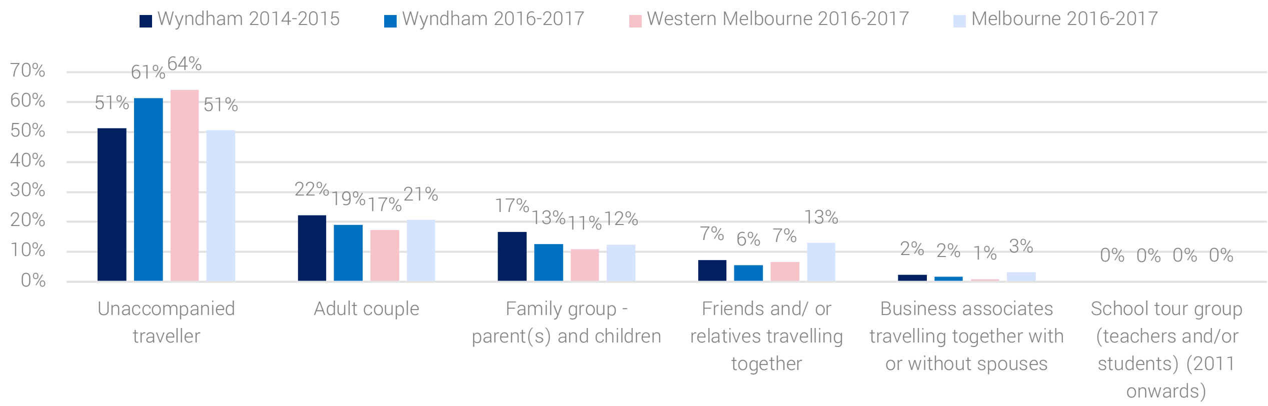


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

INTERNATIONAL VISITORS

Lone person travellers were also the most common type of international visitor to the City of Wyndham at 61% (2016-17).

FIGURE 26 INTERNATIONAL VISITORS – TRAVEL PARTY TYPE

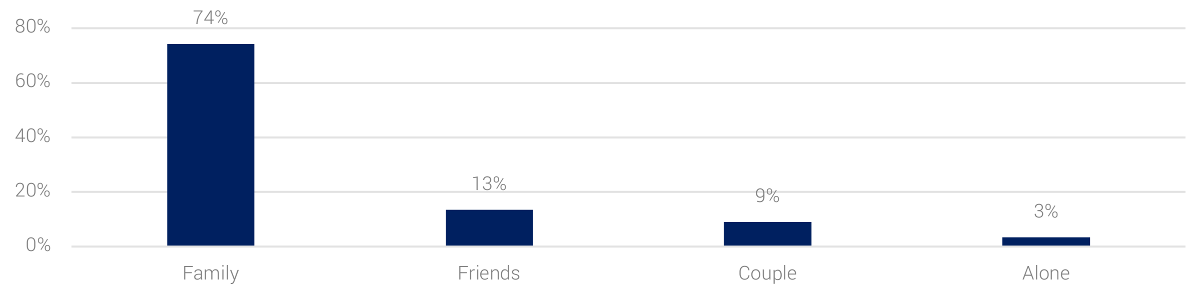


Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

VISITOR SURVEY

The Visitor Survey found that 74% of respondents travelled to the City of Wyndham as a family, 13% with friends, 9% as part of a couple and 3% visited alone. These results conflict with the TRA results, which suggest lone travellers are the most common type of visitor. This may be due to the fact that the TRA data does not account for local visitation, with overnight visitors limited to those that stayed a night at least 40km from home.

FIGURE 27 TYPE OF TRAVEL PARTY



N= 1994

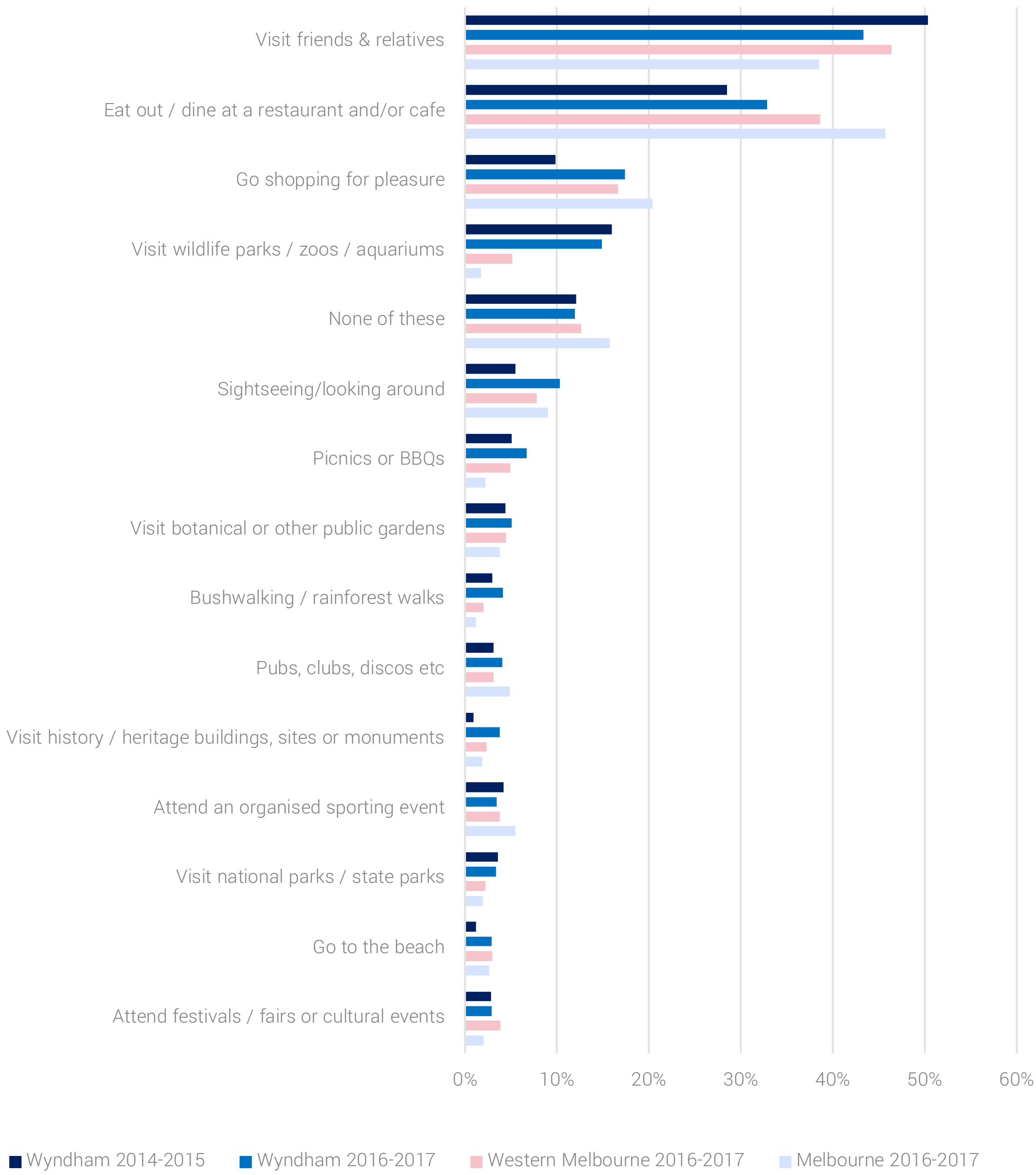
Source: Wyndham Visitor Survey – Q: Who did you travel with to Werribee, Point Cook, Tarneit or Hoppers Crossing? Compiled by Urban Enterprise, 2018.

2.2.6. ACTIVITIES

DOMESTIC DAYTRIP VISITORS

The most popular activity undertaken by domestic daytrip visitors to Wyndham in 2016-17 was visiting friends and relatives (43%), followed by eating out (33%), and shopping (17%) (Figure 28). A higher proportion of visitors to Melbourne dined out/ ate out when compared to the results for Wyndham.

FIGURE 28 DOMESTIC DAYTRIP VISITORS – TOP 15 ACTIVITIES



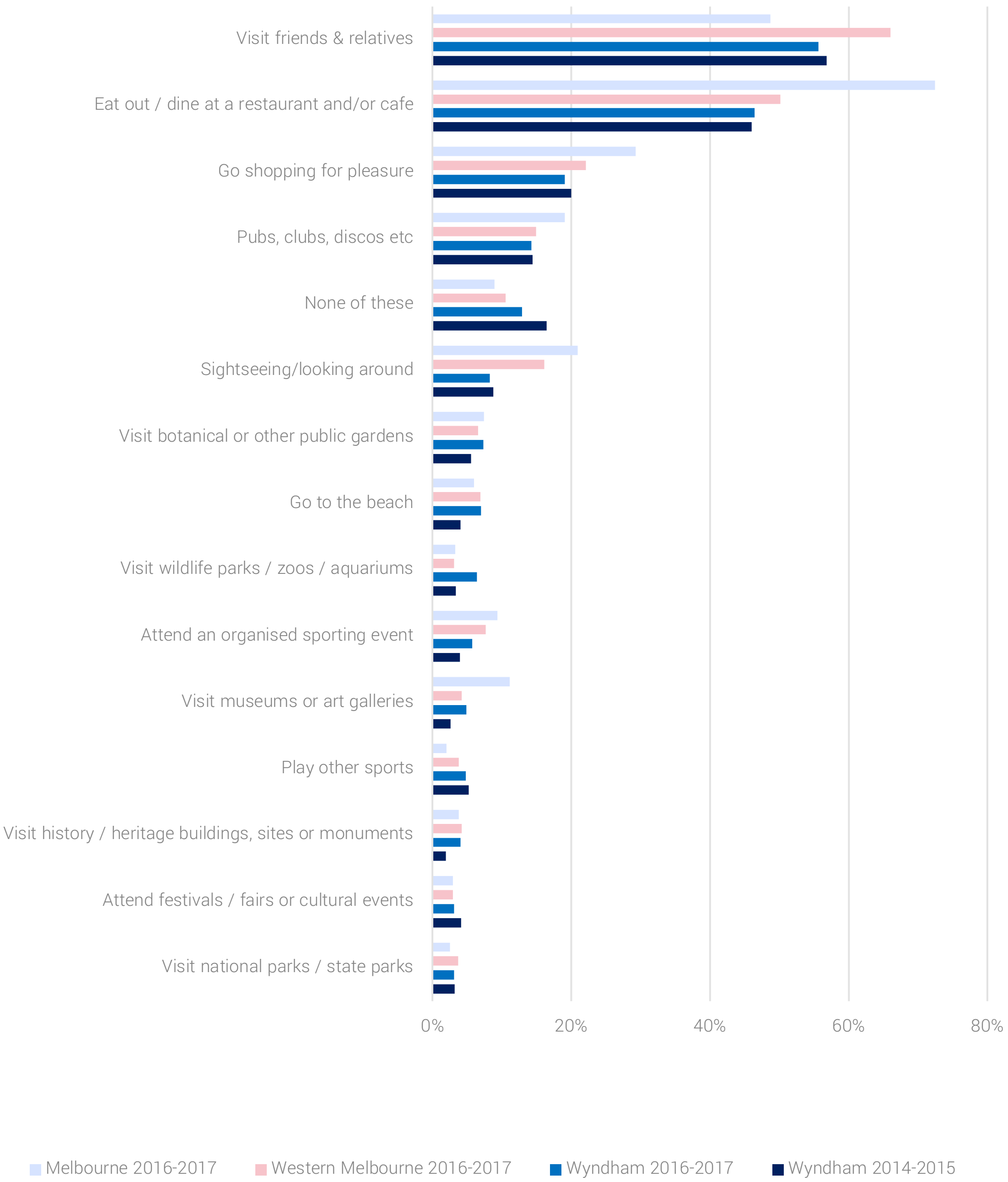
Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

DOMESTIC OVERNIGHT VISITORS

As with domestic daytrip visitors to Wyndham, the most popular activity for domestic overnight visitors in 2016-17 was visiting friends and relatives (66%), followed by eating / dining out (50%) (Figure 29).

The VFR market is a clear driver of visitation to the City of Wyndham. As residential development continues and the population increases the size of the VFR market will also increase, providing increased opportunities for investment in tourism, accommodation and food services in the City of Wyndham.

FIGURE 29 DOMESTIC OVERNIGHT VISITORS – TOP 15 STOPOVER ACTIVITIES

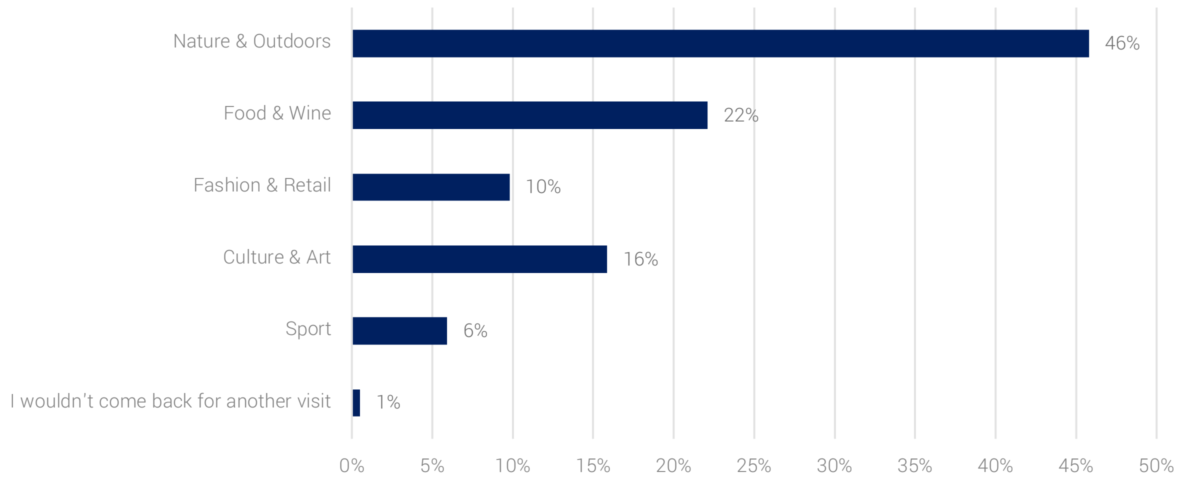


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

VISIT MOTIVATORS

The **Visitor Survey** found that 46% of respondents would visit Wyndham again for nature-based and outdoor activities, 22% for food and wine, 16% for culture and art,10% for fashion and retail and 6% for sport.

FIGURE 30 RETURN VISIT MOTIVATOR



Source: Wyndham Visitor Survey – Q: What would bring you back for another visit? Compiled by Urban Enterprise, 2018.

N= 4116

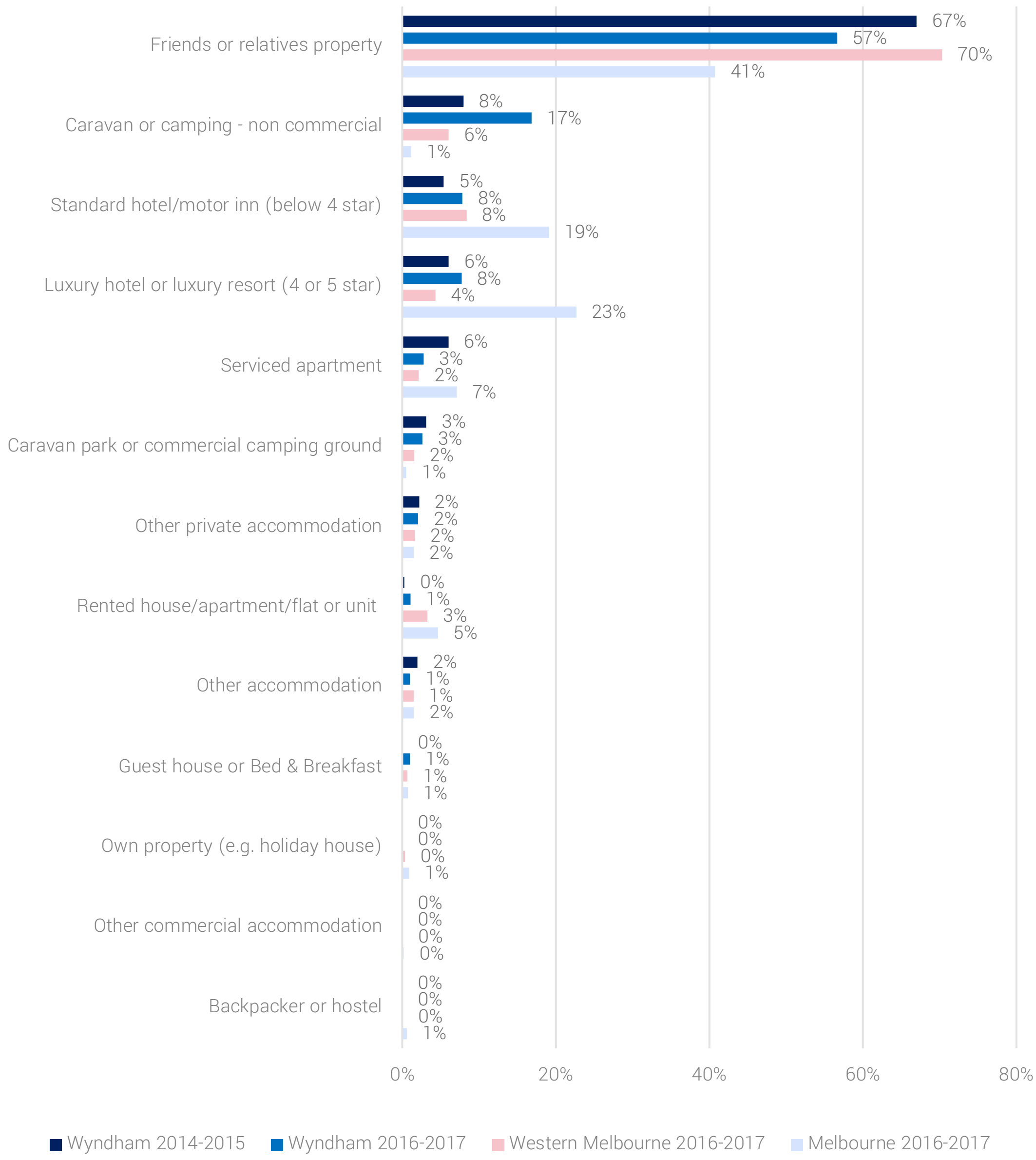
2.2.7. ACCOMMODATION

DOMESTIC OVERNIGHT VISITORS

Domestic overnight visitors to Wyndham in 2016-17 predominantly stayed with friends and relatives (57%) (Figure 31), followed by non-commercial caravan or camping grounds (17%). Hotels and motor inns (8%) and luxury hotels (8%) were the most common commercial accommodation type stayed in by visitors.

A much higher proportion of visitors to Melbourne stayed in standard and luxury hotels when compared to the City of Wyndham.

FIGURE 31 DOMESTIC OVERNIGHT VISITORS – ACCOMMODATION

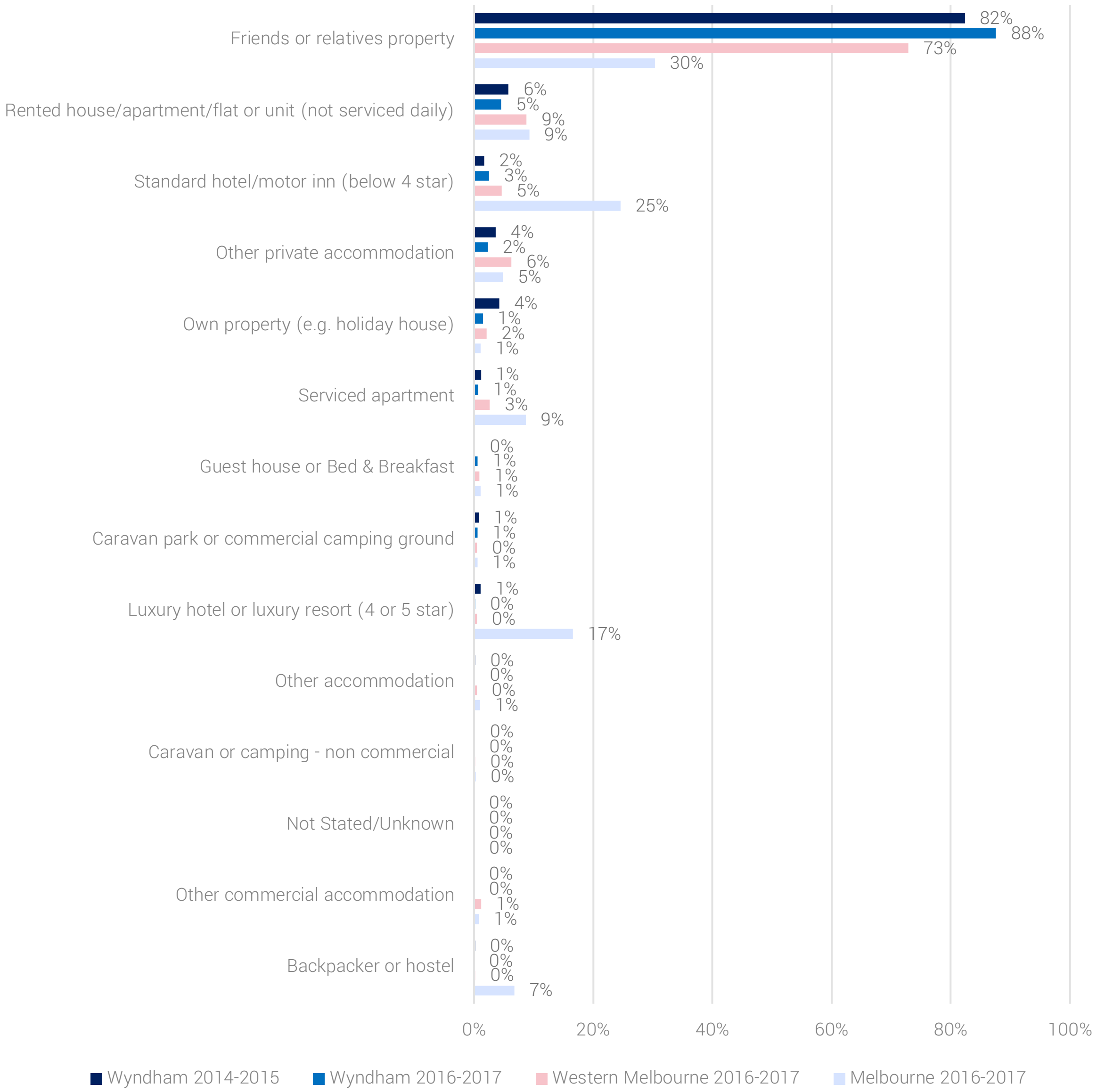


Source: Tourism Research Australia – NVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018.

INTERNATIONAL VISITORS

Staying at a friends' or relatives' property was also the most common form of accommodation for international visitors (88%). A higher proportion of visitors to Melbourne stayed in hotels and serviced apartments.

FIGURE 32 INTERNATIONAL VISITORS - ACCOMMODATION



Source: Tourism Research Australia – IVS – 2014-2015 and 2016-2017 – presented as 2 year averages – compiled by Urban Enterprise, 2018

2.2.8. VISITOR DEMOGRAPHICS KEY FINDINGS

ACTIVITIES

Visiting friends and relatives was the most popular activity for domestic visitors, with around 50% of overnight and daytrip visitors participating in this activity, which is a higher proportion than visitors to Melbourne. **VFR visitation is a clear driver of visitation to Wyndham and as the resident population increases so too will growth in this market.**

A significantly lower proportion of domestic daytrip and overnight visitors to the region ate or dined out as part of their visit compared to visitors to Melbourne and Western Melbourne. This may indicate **opportunity to increase visitor patronage to existing cafes and restaurants or opportunity for new food and wine product in the region.**

The Visitor Survey found that almost half of all visitors would visit Wyndham again for nature-based and outdoor activities. TRA data showed that 15% of domestic daytrip visitors visited wildlife parks/zoos/aquariums, and 10% went sightseeing / looking around. **Nature based assets and attractions are highlighted as a key strength in the Visitor Survey results. Existing nature based tourism assets could potentially be further leveraged through product development and promotion to increase visitation.**

For both domestic daytrip and domestic overnight visitors, a high proportion participated in shopping as part of their trip, with participation in this activity for domestic daytrip visitors growing from 10% to 17% of visitors from 2014-15 to 2016-17.

INTERNATIONAL COUNTRY OF ORIGIN

A significantly higher proportion of international visitors to Wyndham in 2016-2017 were from India (25%), compared to visitors to Western Melbourne (11%) and Melbourne (5%). There was also a significant increase in Indian visitors from 2014-15 (13%) to 2016-17 (25%). The proportion of visitors from China decreased relative to other international markets between 2014-15 and 2016-17 (from 11% to 7%), which although in line with the Western Melbourne proportion, was lower than the 22% of Chinese visitors to Melbourne as a whole. **The growth in Indian visitors is a key opportunity for Wyndham in terms of potential take up and patronage of tourism product and activities in the region. The Chinese visitor market can also be further leveraged off the back of growth in visitation to Melbourne. This may include increased marketing to the Chinese market and Chinese language friendly tourism attractions and product.**

AGE PROFILE

Both domestic daytrip and overnight visitor results varied between 2014-15 and 2016-17. This was particularly noticeable for domestic overnight visitors, where the proportion of those aged 20-24 years, 30-34 years, and 50-54 years reduced from 2014-15 to 2016-17. There was also a higher proportion of domestic daytrip visitors aged between 30-44 years, compared to domestic overnight visitors

There was a higher proportion of international visitors aged under 29 and over 60. The proportion of International visitors aged between 55-59 years also experienced a decline from 17% to 10%.

Visitor Survey results closely align with the domestic daytrip visitor profile, showing a high proportion of visitors aged between 35 and 44 years.

GENDER

There was generally a higher proportion of male visitors from the domestic overnight market compared to female visitors (59% males to 41% females), whilst there was a higher proportion of female visitors to male visitors from the international market (56% female to 44% male). These results generally align to the results for Western Melbourne.

DOMESTIC VISITOR MARKET

For domestic overnight visitors, there was a noticeable increase in the proportion of visitors from Queensland between 2014-2015 and 2016-17, increasing from 7% of total visitors to 16%, which was marginally higher than for Western Melbourne (13%) and Melbourne (12%). This could potentially be as a result of the introduction of direct flights from the Gold Coast to Avalon Airport in late 2015. **Avalon Airport presents a key strategic asset and driver of increased visitation to the City of Wyndham. The growth in domestic arrivals through Avalon Airport as well as future international arrivals through AirAsia X will provide a significant opportunity for tourism growth in the City of Wyndham.**

REASON FOR VISIT

Growth in the proportion of holiday visitors to Wyndham was evident for both the domestic daytrip and international visitor markets between 2014-15 to 2016-17. However, the business market was a key area of growth for domestic overnight visitors, with the proportion of holiday overnight visitors remaining the same.

TRAVEL PARTY

TRA data showed that a high proportion of domestic overnight visitors and international visitors to the region travelled alone (49% and 61% respectively), however, Visitor Survey results showed that those travelling as a family comprised 74% of respondents. These differing results are likely a result of the collection methods of the surveys.

ACCOMMODATION

A low proportion of domestic overnight and international visitors utilised commercial accommodation, with the majority of domestic overnight visitors staying with friends and relatives (57%) or in non-commercial caravan or camping (17%), and 89% of international visitors staying with friends or relatives. This aligns with the high proportion of visitors who were visiting friends and relatives both as the purpose of their visit, and/or as an activity during their visit**. Growth in commercial accommodation use is likely to be driven by growth in the business and corporate market, holiday and events visitors.**

3. COMMUNITY SURVEY RESPONDENTS AND VFR

The following provides an overview of VFR visitors to Wyndham and a profile of respondents to the Community Survey.

Data has been sourced from the Community Survey. As noted in Section 1.2.2, 75% of respondents to the Community Survey were born in Australia. This is at odds with the resident population of Wyndham, with the ABS (2016) showing that 47% of residents are born overseas. The results therefore may be skewed toward Australian born residents in the City of Wyndham.

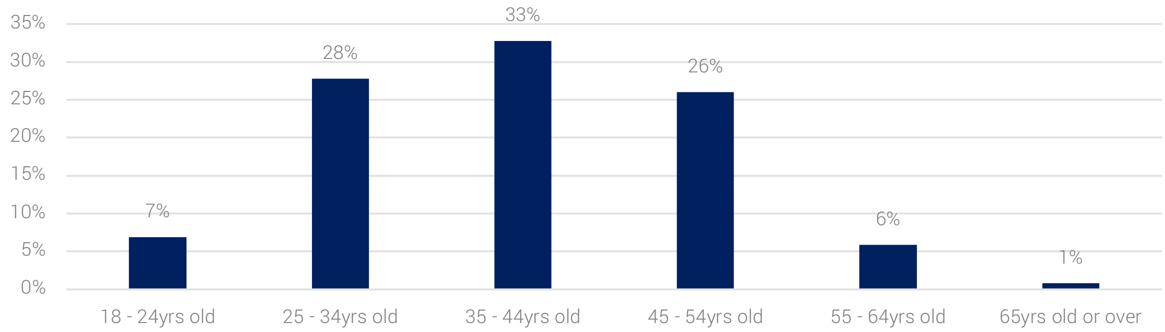
3.1. COMMUNITY SURVEY RESPONDENTS

The following results relate to the demographics of Community Survey respondents, as reported in the Community Survey Results.

3.1.1. AGE

Community Survey respondents were primarily aged 35- 44 years (33%), followed by 25- 34 (28%) and 45- 54 years (26%) (Figure 33).

FIGURE 33 AGE PROFILE OF RESPONDENTS



Source: Wyndham Locals Survey – Q: What is your age range? Compiled by Urban Enterprise, 2018.

N= 1146

3.1.2. GENDER

As with respondents to the Visitor Survey, Community Survey respondents were primarily female (90%) (Figure 34).

FIGURE 34 GENDER (LOCALS)

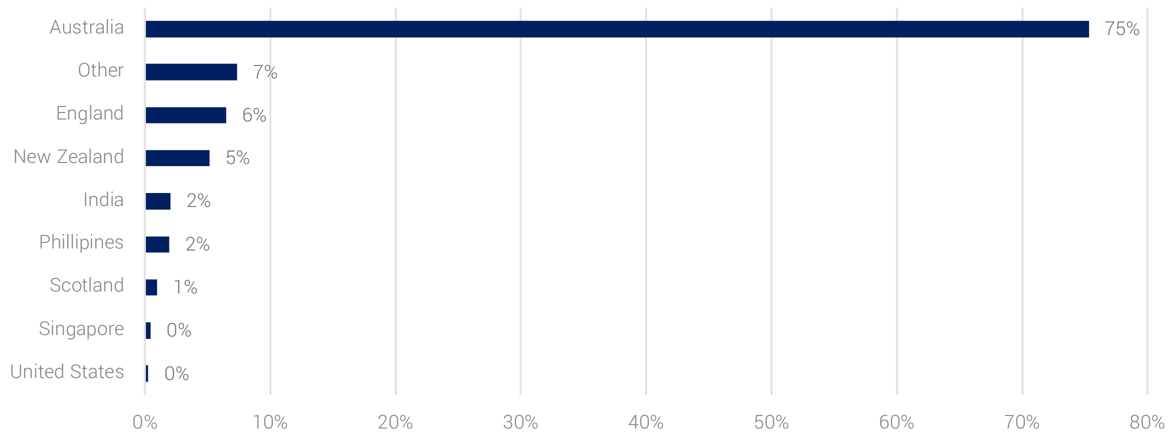
Source: Wyndham Locals Survey – Q: What is your gender? Compiled by Urban Enterprise, 2018.

N= 1137

3.1.3. ORIGIN

The majority of **Community Survey** respondents were born in Australia (75%) followed by a small proportion who were born in England (6%) and New Zealand (5%) (Figure 35).

FIGURE 35 COUNTRY OF BIRTH (LOCALS)



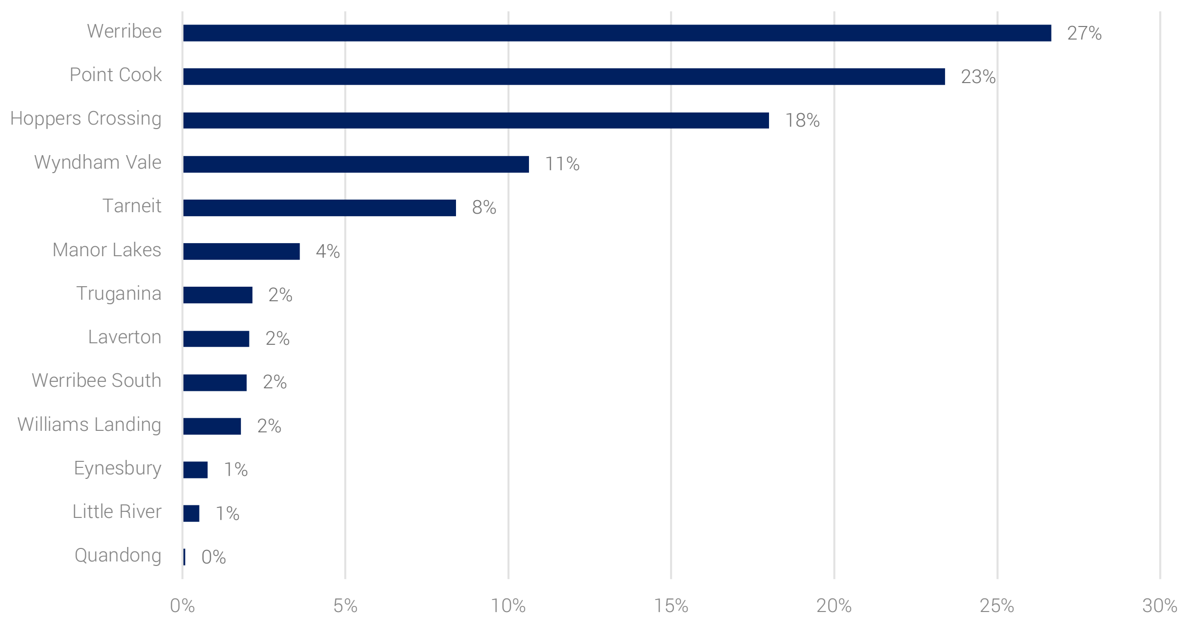
Source: Wyndham Locals Survey – Q: Which country were you born in? Compiled by Urban Enterprise, 2018.

N= 1126

3.1.4. LOCATION

The majority of **Community Survey** respondents were living in the larger suburbs of Werribee (27%), Point Cook (23%), Hoppers Crossing (18%) and Wyndham Vale (11%) (Figure 36).

FIGURE 36 USUAL RESIDENCE



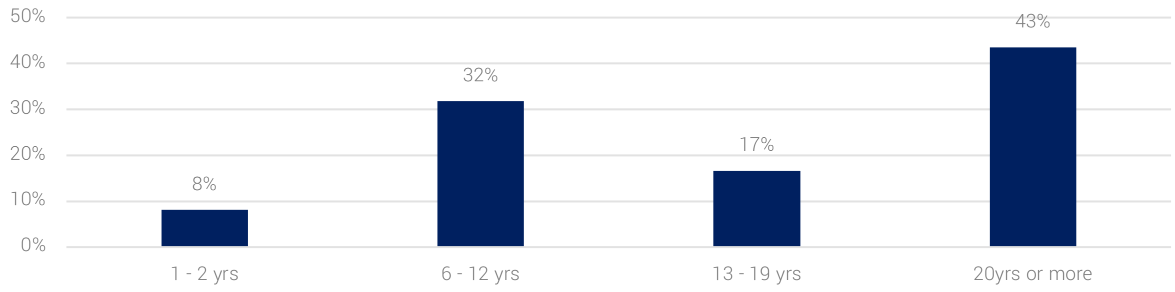
Source: Wyndham Locals Survey – Q: Which suburb do you live in? Compiled by Urban Enterprise, 2018.

N= 1167

3.1.5. LENGTH OF RESIDENCY

The **Community Survey** indicates that a significant proportion of respondents are long term Wyndham residents, having lived in the LGA for 20 years or more (43%), followed by 6- 12 years (32%), and 13- 19 years (17%). Only 8% had lived in Wyndham for between 1- 2 years (Figure 37).

FIGURE 37 TIME SPENT LIVING IN WYNDHAM



Source: Wyndham Locals Survey – Q: How long have you lived in the City of Wyndham? Compiled by Urban Enterprise, 2018.

N= 902

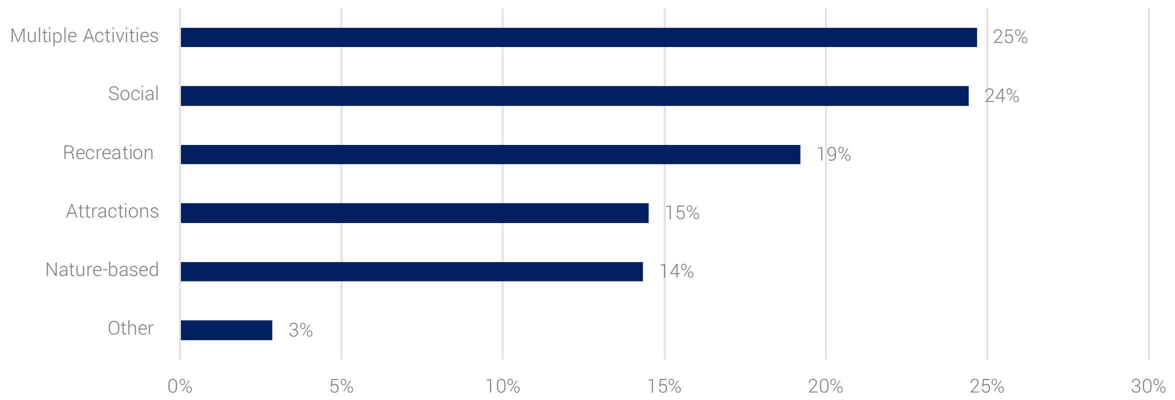
3.1.6. ACTIVITIES

PARTICIPATION

In identifying their favourite things to do in the local area, the majority of **Community Survey** respondents identified multiple activities which generally included one or more of the following: Werribee Zoo, shopping, nature-based and/ or dining out. Other major attractions identified included Werribee Mansion Precinct, Pacific Werribee, Werribee Park, Shadowfax Winery and the RAAF Museum (Figure 38).

Recreation and social activities were also popular among local residents. The most common social activities were shopping, going to the movies, attending community events, visiting libraries and eating out at local cafes and restaurants. The most common recreational activities consisted of dog walking, cycling, visiting playgrounds, and hiking the You Yangs. Nature-based activities were also popular amongst local respondents, namely Werribee South beach, sight-seeing along Werribee River, President Park and Skeleton Creek.

FIGURE 38 FAVOURITE ACTIVITIES FOR LOCAL RESIDENTS



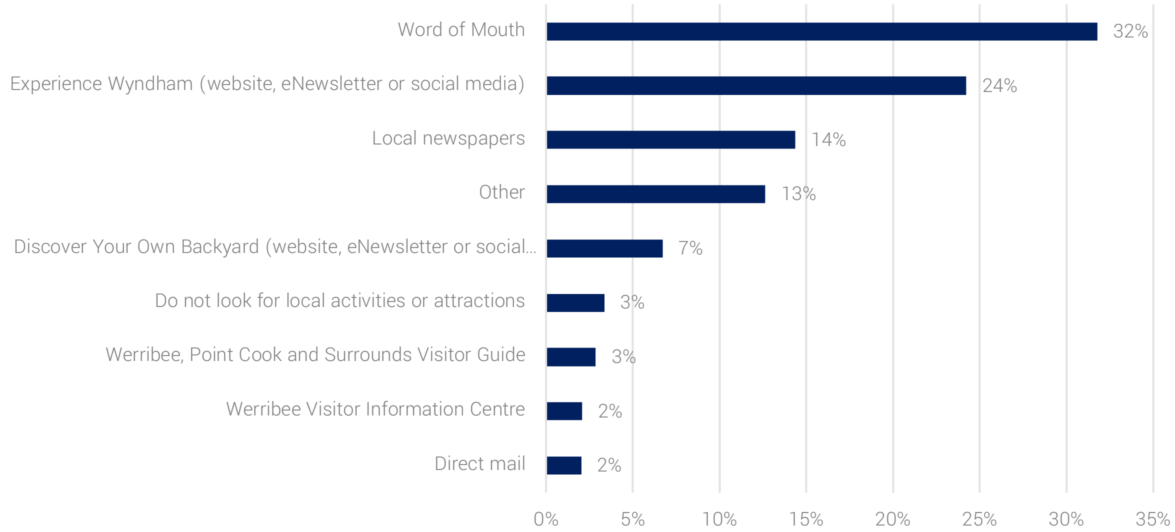
Source: Wyndham Locals Survey – Q: What is your favourite thing to do in the local area? Open ended question coded into six broad categories. Compiled by Urban Enterprise, 2018.

N= 1151

INFORMATION SOURCES

Word of mouth was the most popular method of sourcing information about activities and attractions accounting for 32% of **Community Survey** respondents, followed by the Experience Wyndham website (24%) and local newspapers (14%). 'Other' sources of information were primarily digital based, including 5.9% of respondents who sourced information through Facebook, with other responses including the Mamma Knows West website, and 'Social Media'.

FIGURE 39 ACTIVITIES AND ATTRACTIONS INFORMATION SOURCES



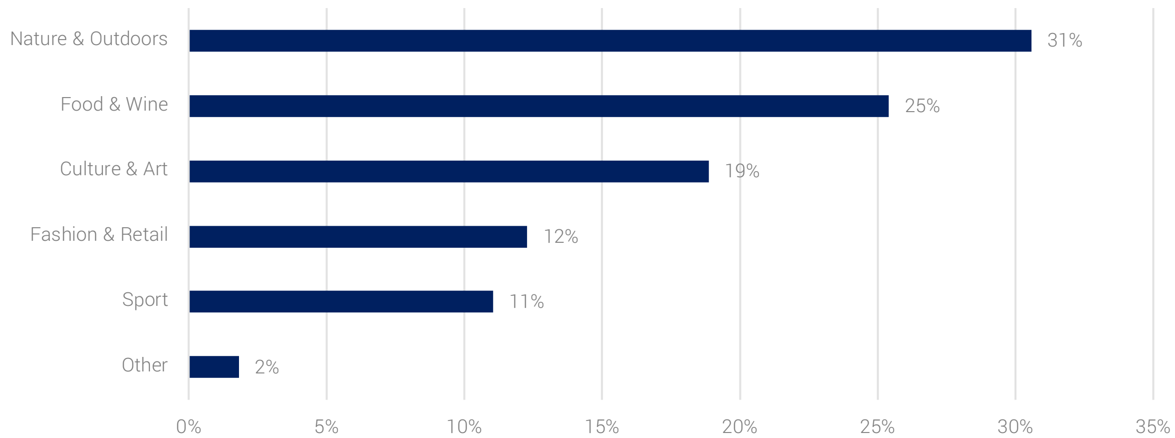
Source: Wyndham Locals Survey – Q: Where do you get information about activities and attractions that are available? Compiled by Urban Enterprise, 2018.

N= 2027

PROMOTION OF LOCAL ACTIVITIES

Community Survey respondents highlighted nature and outdoor activities (31%), food and wine (25%) and culture and art (19%) as the top three activities they would like to see further promoted to residents (Figure 40).

FIGURE 40 FUTURE PROMOTION OF LOCAL ACTIVITIES BY % OF BUSINESSES



Source: Wyndham Locals Survey – Q: Which activities in the local area would you like to see promoted to residents? Compiled by Urban Enterprise, 2018.

N= 3133

3.1.7. HOSTING VISITORS

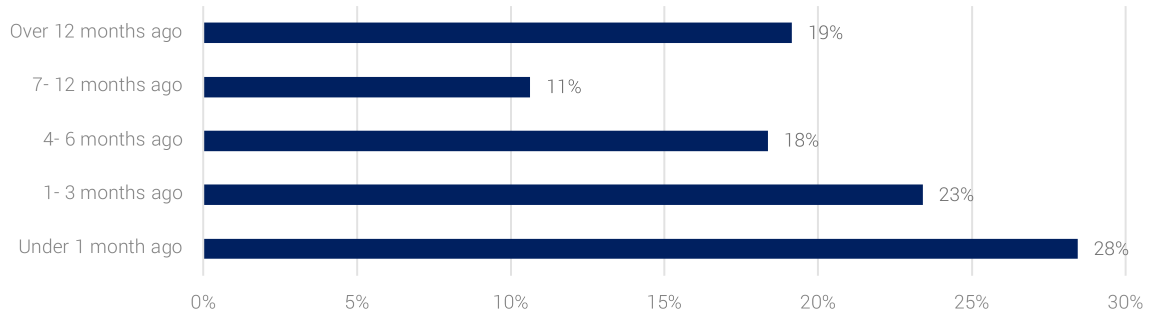
The **Community Survey** identified that 79% of resident respondents have had visitors stay with them previously (Figure 41), and of those over half have had visitors stay with them in the last 3 months, with 28% of respondents reporting visitors having stayed with them under 1 month ago (Figure 42).

FIGURE 41 PREVIOUS VISIT

Source: Wyndham Locals Survey – Q: Have you ever had visitors stay with you at your home? Compiled by Urban Enterprise, 2018.

N= 1151

FIGURE 42 LAST VISITOR STAY



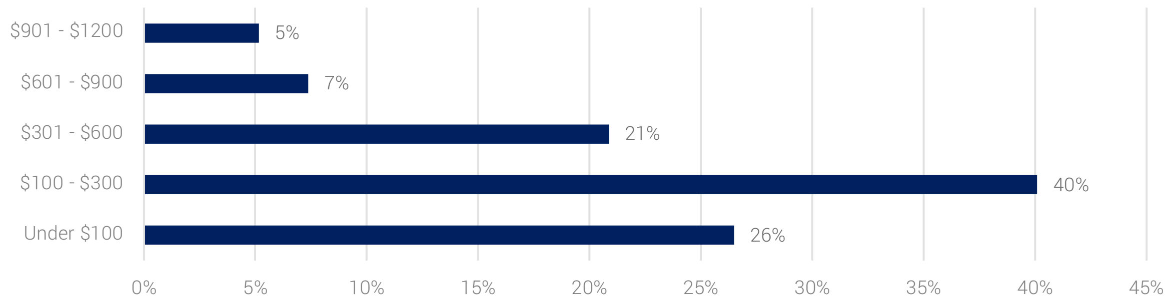
Source: Wyndham Locals Survey – Q: When was the last time you had visitors stay with you? Compiled by Urban Enterprise, 2018.

N= 893

3.1.8. EXPENDITURE

The **Community Survey** identified that 40% of respondents spent between $100- $300 preparing for and during their visitors stay, followed by those who spent under $100 (26%) and $301- $600 (21%) (Figure 43). This data suggests that VFR visitors contribute a significant amount to the local economy both through hosting and in region visitor expenditure.

FIGURE 43 RESIDENT SPEND PRE AND DURING VISITOR STAY



Source: Wyndham Locals Survey – Q: How much did you spend in total preparing and during your most recent visitors stay? Compiled by Urban Enterprise, 2018.

N= 853

3.1.9. COMMUNITY SURVEY RESPONDENTS KEY FINDINGS

Respondents to the Community Survey were primarily female, long-term residents of Wyndham, who were born in Australia and aged between 25 and 54 years. The majority of respondents lived in Werribee, Point Cook and Hoppers Crossing.

The results show that hosting visitors is relatively frequent amongst residents, with 79% of respondents having had visitors stay with them previously, and over half of these having hosted visitors within the last three months.

The favourite activities of Community Survey respondents showed a clear link to nature-based activities, including outdoor recreation, which was also evident across the TRA Data and Visitor Survey findings, with nature-based activities also highlighted as an activity/attraction they would like to see further promoted.

Community Survey respondents also utilised a wide range of information sources to find out about local activities and attractions, with key sources including word of mouth, the experience Wyndham newsletter and local newspapers.

VFR visitors also contribute significantly to the visitor economy through local expenditure preparing for their visitors arrival and during their stay. The majority of VFR hosts

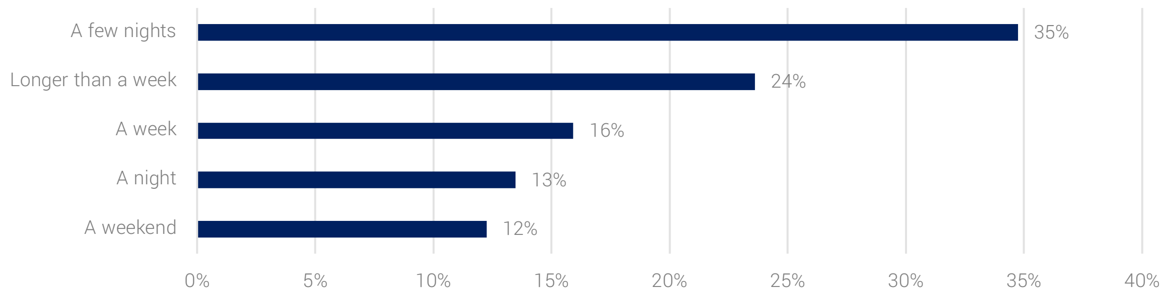
3.2. VFR VISITORS

The following includes analysis of VFR visitors as reported by hosts in the Community Survey Results.

3.2.1. LENGTH OF VISITOR STAY

Community Survey respondents identified that their VFR visitors primarily stayed with them for a few nights (35%) or longer than a week (24%). The survey results suggest that the majority of visitors stay for between a night and a week.

FIGURE 44 VFR LENGTH OF STAY



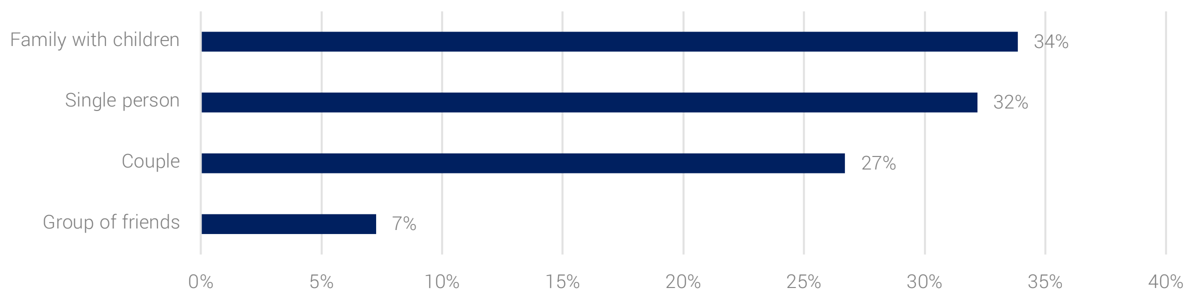
Source: Wyndham Locals Survey – Q: How long did your most recent visitors stay? Compiled by Urban Enterprise, 2018.

N= 898

3.2.2. TRAVEL GROUP

Community Survey respondents reported their visitors were primarily travelling as part of a family group (34%), alone (32%) or as part of a couple (27%).

FIGURE 45 VFR TRAVEL PARTY



Source: Wyndham Locals Survey – Q: Which best describes your most recent visitors? Compiled by Urban Enterprise, 2018.

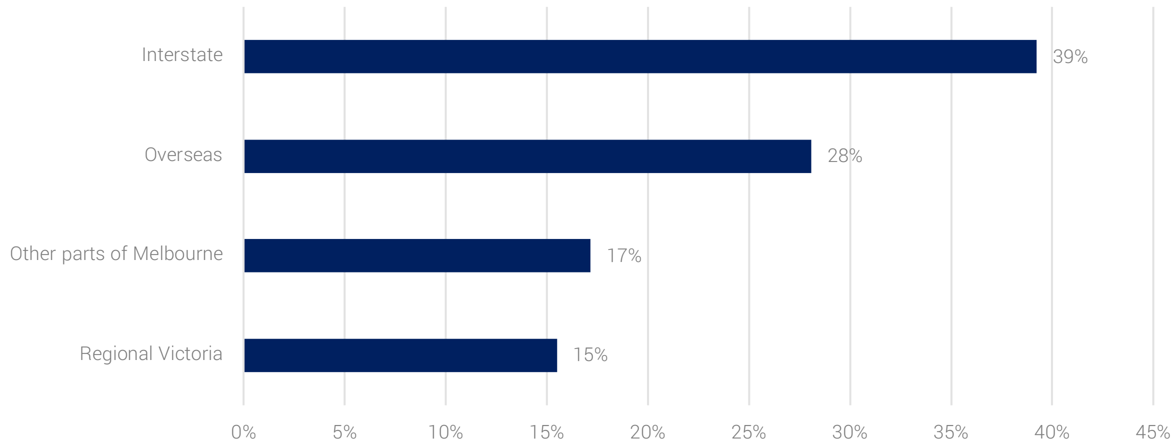
N= 895

3.2.3. ORIGIN

VISITOR ORIGIN

Community Survey respondents identified that their visitors were primarily from Interstate (39%), followed by intrastate (32%), and overseas (28%) (Figure 46). The results also show that 17% of visitors come from other parts of Melbourne, which further suggests that TRA estimates of domestic visitation could be underestimated.

FIGURE 46 VFR ORIGIN



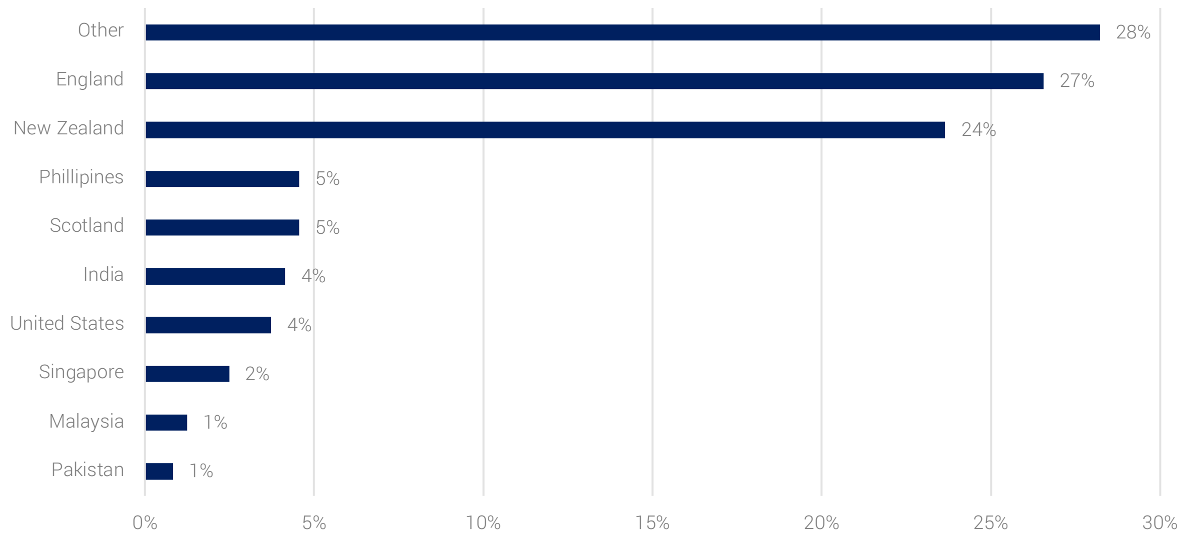
Source: Wyndham Locals Survey – Q: Where were your most recent visitors from? Compiled by Urban Enterprise, 2018.

N= 897

INTERNATIONAL VISITORS COUNTRY OF ORIGIN

Of those respondents who reported their visitors as originally from overseas, the main countries of origin included England (27%), New Zealand (24%), the Philippines (5%) and Scotland (5%).

FIGURE 47 INTERNATIONAL VFR COUNTRY OF ORIGIN



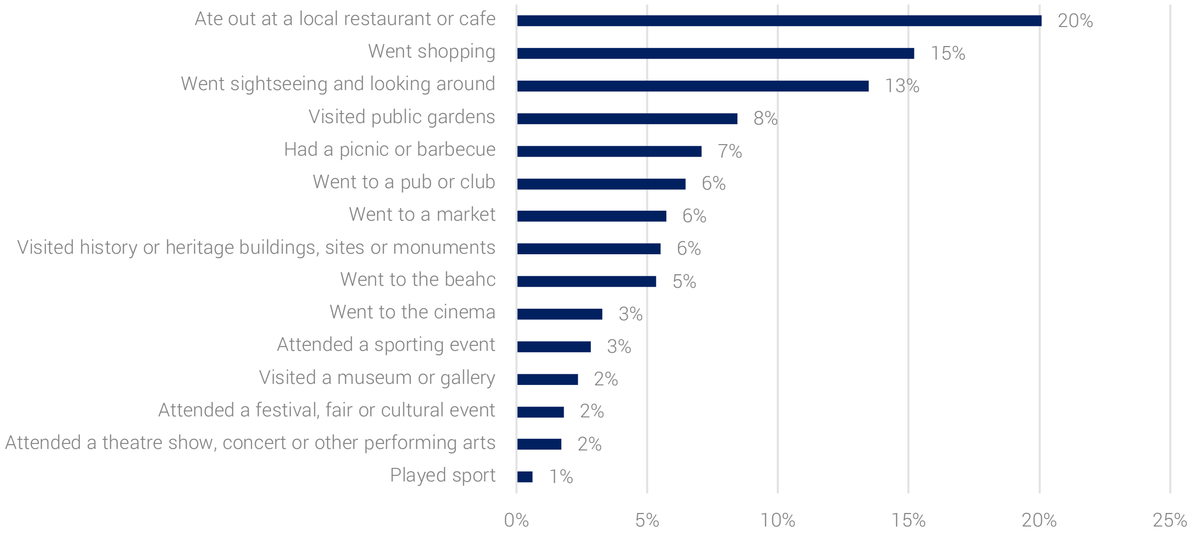
Source: Wyndham Locals Survey – Q: Which country were your most recent visitors from? Compiled by Urban Enterprise, 2018.

N= 241

3.2.4. ACTIVITIES

The most popular activities undertaken by Community Survey respondents with their VFR guests included eating at a local restaurant or café (20%) shopping (15%) and sightseeing (13%).

FIGURE 48 ACTIVITIES



Source: Wyndham Locals Survey – Q: What did you do with your visitors locally when they were visiting? Compiled by Urban Enterprise, 2018. N=- 3371

3.2.5. VFR VISITORS KEY FINDINGS

The Community Survey identified the following key findings for VFR visitors as reported by hosts:

- VFR visitors stayed longer than the average length of stay recorded for all visitors to the region within the TRA data. This higher length of stay for VFR visitors provides opportunity for greater take up of a variety of activities whilst in the City of Wyndham.
- 28% of VFR visitors were from overseas, indicative of the culturally diverse population of Wyndham.
- The results of the community survey show that key VFR travel groups include families with children (34%), lone travellers (32%) and couples (27%).
- The top activities undertaken by Community Survey respondents with their VFR visitors mirrored the top activities undertaken by domestic daytrip and domestic overnight visitors within the TRA Data. Key activities include eating out at a local restaurant, shopping and sightseeing.

4. INDUSTRY PROFILE

This section of the report provides a profile of the local industry in Wyndham and its engagement with the visitor economy and the wider tourism industry, with results drawn from the **Industry Survey.**

4.1. INDUSTRY OVERVIEW

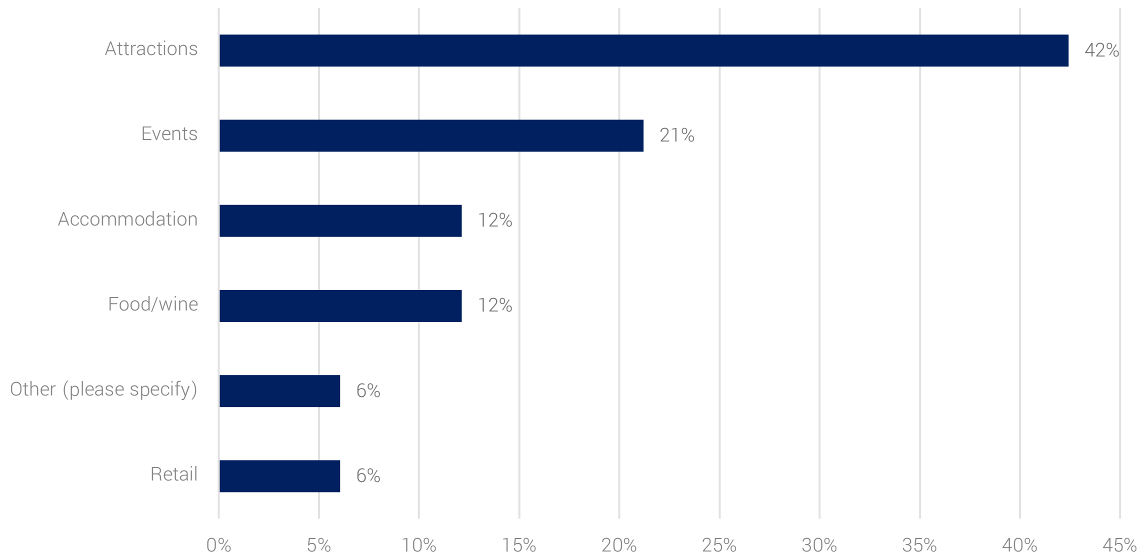
4.1.1. BUSINESS DETAILS

BUSINESS TYPE

Attraction businesses comprised the largest share of businesses who responded to the Industry Survey (42%), followed by events businesses (21%), accommodation (12%) and food/wine (12%). Other businesses included two tourism organisations.

There were also three respondent businesses that were not considered tourism businesses.

FIGURE 49 TYPE OF BUSINESS BY % OF BUSINESSES



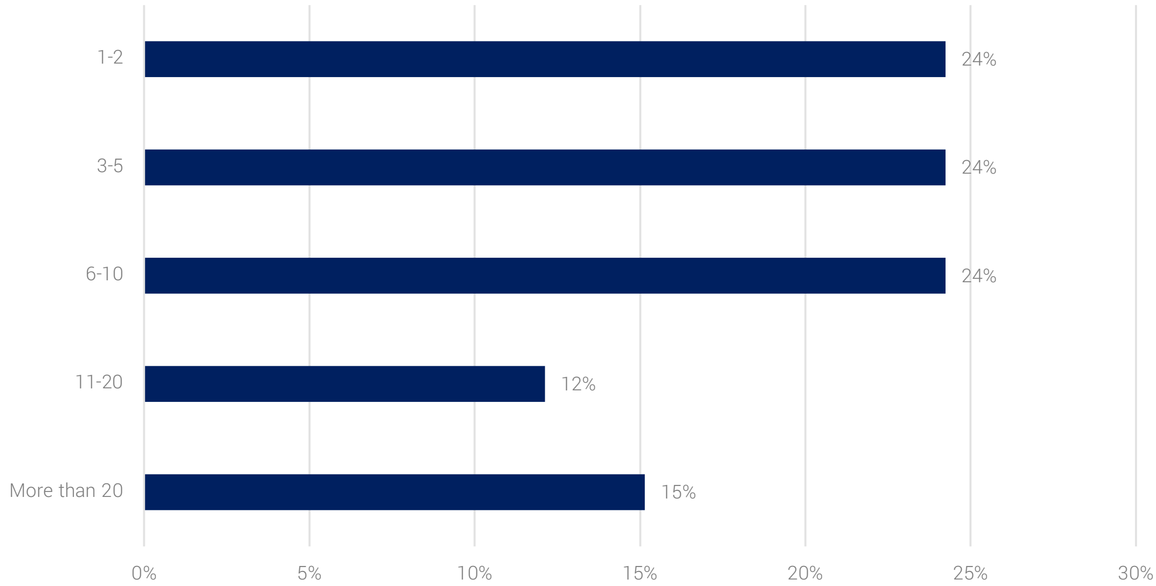
Source: Visitor Economy Industry Survey – Q: What type of business are you?

N= 33

BUSINESS SIZE

The majority of businesses surveyed reported employing less than 10 full time employees, with those employing 1-2, 3-5 and 6-10 employees each comprising 24% of respondents (Figure 50).

FIGURE 50 NUMBER OF FULL TIME EMPLOYEES BY % OF BUSINESSES



Source: Visitor Economy Industry Survey – Q: How many full-time equivalent employees do you have working in your business?

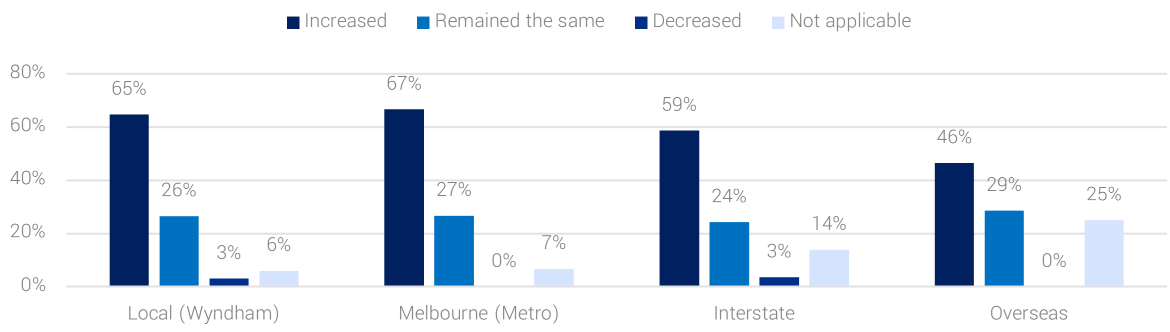
N= 33

4.1.2. BUSINESS VISITOR MARKETS

CHANGES IN VISITOR MARKETS

Businesses reported whether visitation from specific visitor markets had increase, remained the same or decreased over the past 5 years. The majority of businesses reported increased visitation from all markets. Only a very minor proportion of respondents reported a decrease from specific visitor markets.

FIGURE 51 BUSINESS VISITOR MARKETS



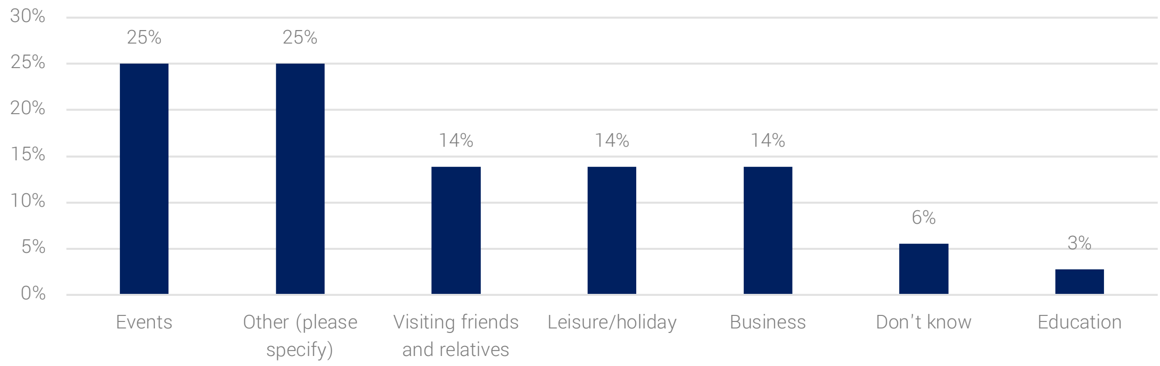
Source: Visitor Economy Industry Survey – Q: Has the number of visitors from the following markets increased, remained the same or decreased for your business in the past 5 years?

N= 35

MOTIVATIONS FOR VISIT

Businesses reported that their patrons key motivations for visiting included for events (25%), VFR (14%), leisure/holiday (14%) and Business (14%). 25% of businesses identified other reasons, which included for specific activities or a mix of below (e.g. events, VFR).

FIGURE 52 MOTIVATIONS FOR VISIT



Source: Visitor Economy Industry Survey – Q: what is your customers' main motivation for visiting the area?

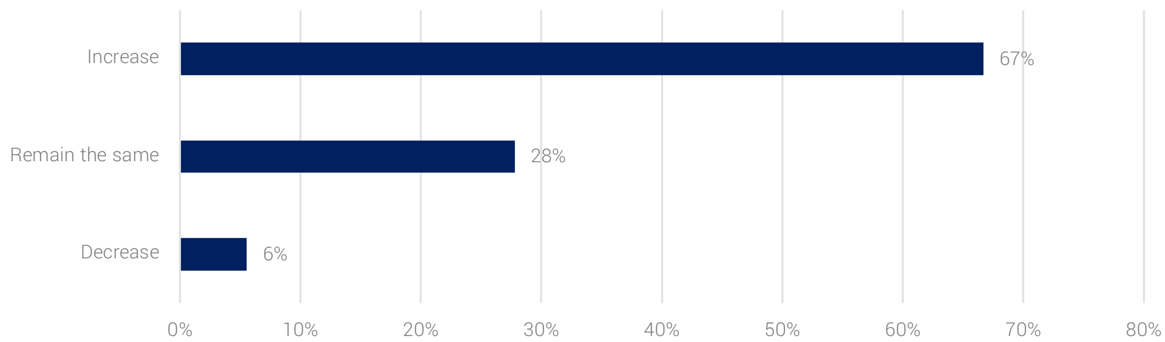
N= 36

4.1.3. INDUSTRY OUTLOOK

EXPECTED TURNOVER

The majority of businesses surveyed expected their turnover to increase in the coming year (67%) compared to 28% who expected turnover to stay the same and 6% who were expecting a decrease (Figure 53).

FIGURE 53 EXPECTED TURNOVER BY % OF BUSINESSES



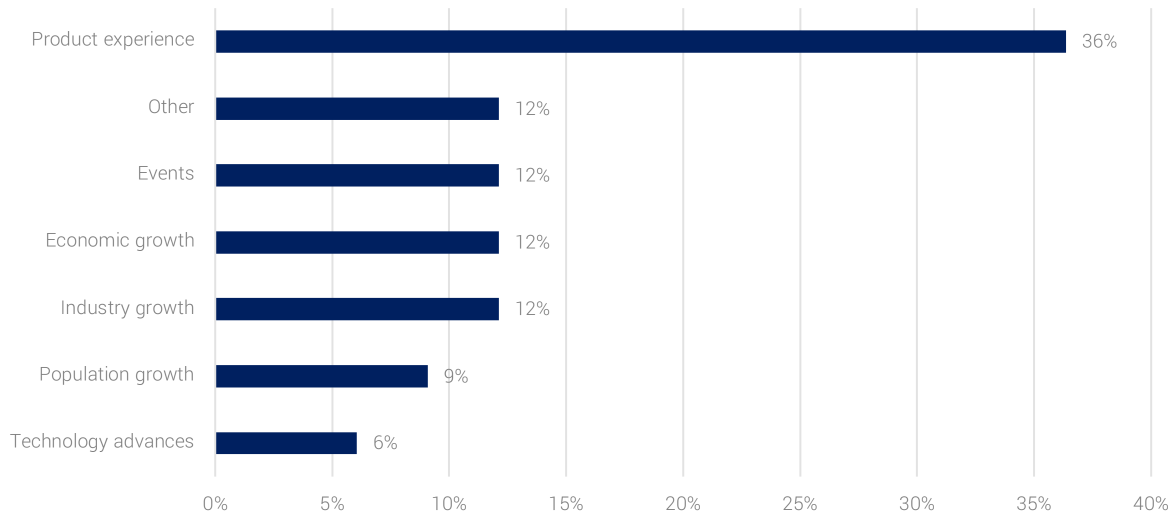
Source: Visitor Economy Industry Survey – Q: Do you expect turnover to increase, decrease or remain the same for the coming year?

N= 36

OPPORTUNITIES

Enhanced product experience (36%), more events (12%), economic growth (12%) and industry growth (12%) were the top current major business opportunities identified by **Industry Survey** respondents, in addition to 'other' opportunities unique to individual businesses (12%) (Figure 54).

FIGURE 54 IDENTIFIED MAJOR BUSINESS OPPORTUNITIES BY % OF BUSINESSES



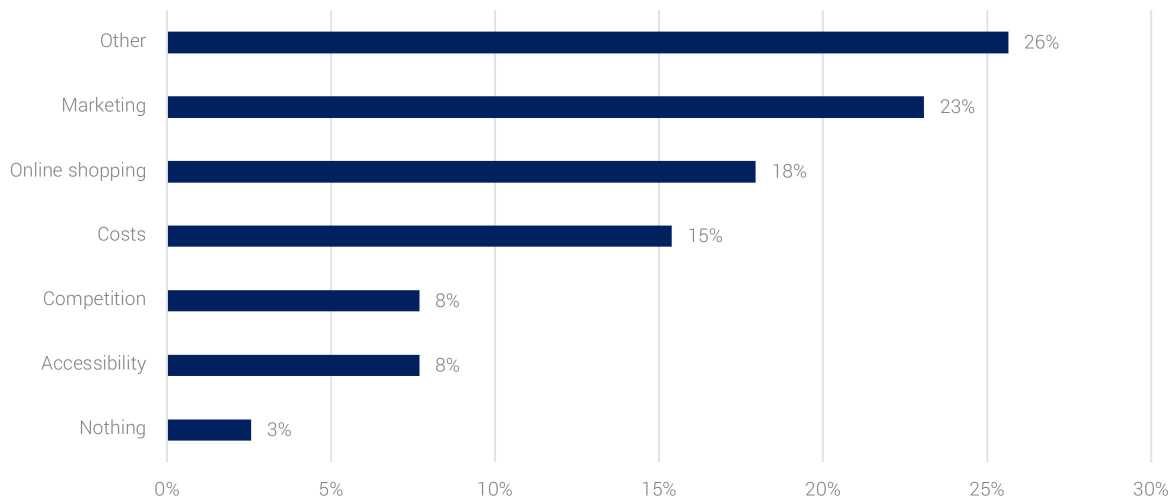
Source: Visitor Economy Industry Survey – Q: What are the current major opportunities for your business?

N= 33

CHALLENGES

The largest share of **Industry Survey** respondents (26%) identified 'other' challenges (unique to their industry) as the current major challenges their business was facing, followed by marketing (23%) and online shopping (18%) (Figure 55).

FIGURE 55 IDENTIFIED MAJOR BUSINESS OPPORTUNITIES BY % OF BUSINESSES



Source: Visitor Economy Industry Survey – Q: What are the current major challenges your business is facing?

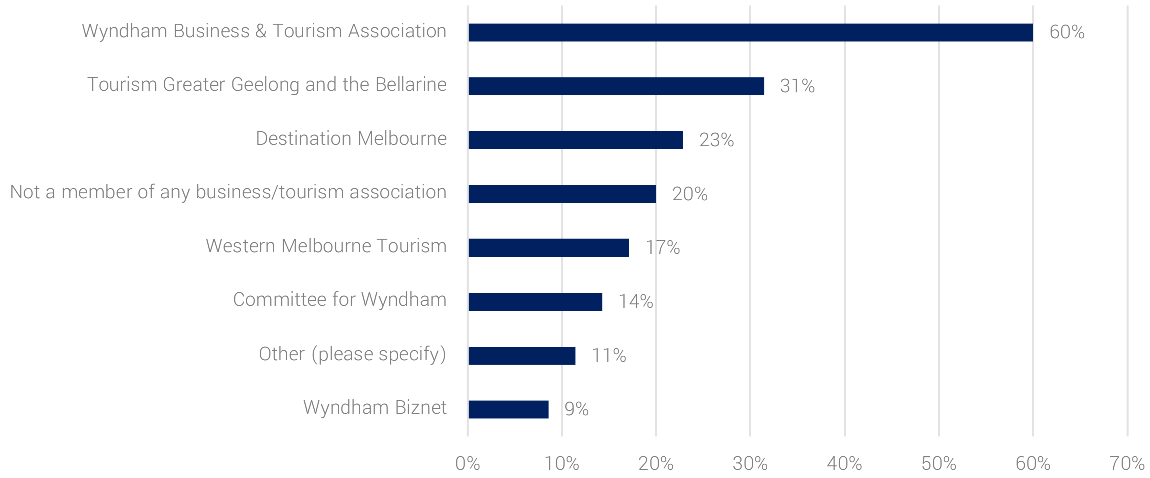
N= 34

4.2. TOURISM INDUSTRY ENGAGEMENT

4.2.1. INDUSTRY MEMBERSHIP

The majority of businesses surveyed were associated with 'Wyndham Business & Tourism Association' (60%), 'Tourism Greater Geelong and the Bellarine (31%) and/or 'Destination Melbourne' (23%) (Figure 56).

FIGURE 56 BUSINESS/TOURISM ASSOCIATION MEMBERSHIP BY % OF BUSINESSES



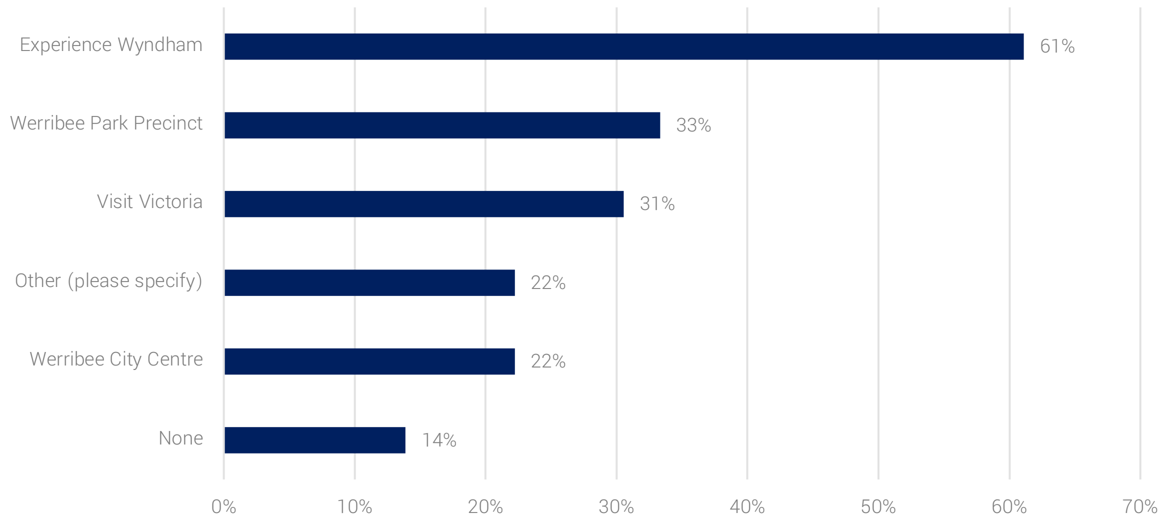
Source: Visitor Economy Industry Survey – Q: Are you a member of any business/ tourism associations?

N= 35

4.2.2. MARKETING AND PROMOTION

The most popular destination brands that businesses associated with were 'Experience Wyndham' (61%), 'Werribee Park Precinct' (33%) and/or 'Visit Victoria' (31%) (Figure 57).

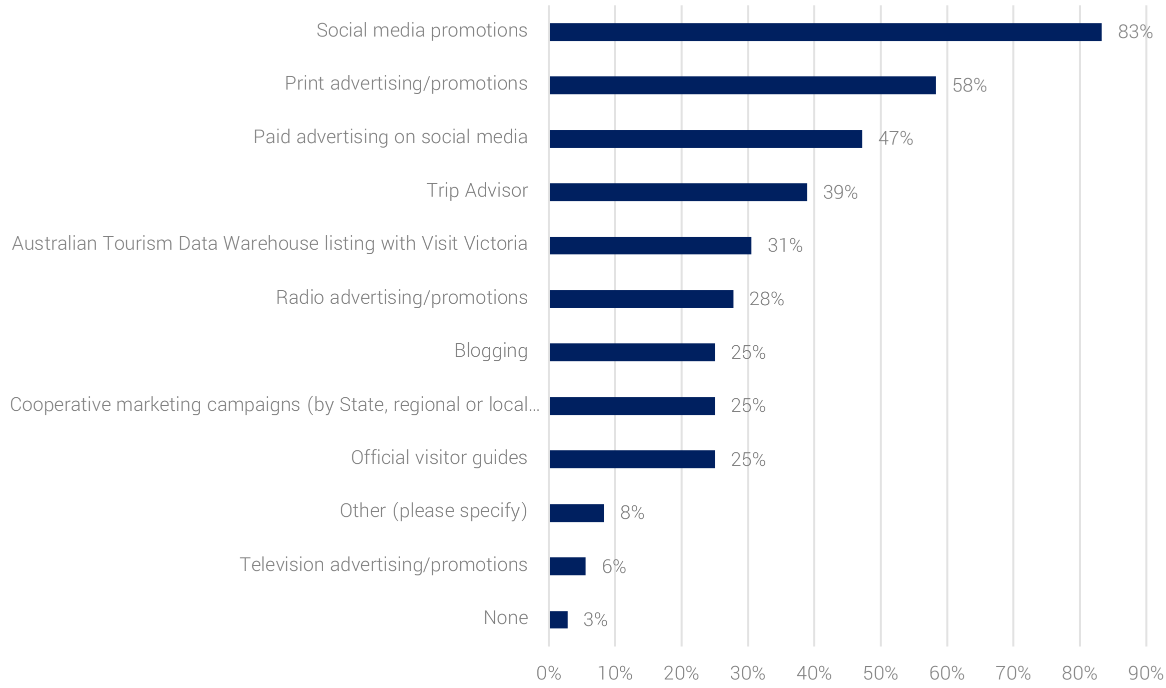
FIGURE 57 DESTINATION BRAND ASSOCIATION BY % OF BUSINESSES



Source: Visitor Economy Industry Survey – Q: Which destination brands do you associate with or partner with when promoting your business?

The survey found that 83% of businesses use social media promotions, followed by print advertising/ promotions (58%) and/or paid advertising on social media (47%) (Figure 58).

FIGURE 58 MARKETING AND PROMOTION USED BY % OF BUSINESSES



Source: Visitor Economy Industry Survey – Q: Which forms of marketing and promotion did your business undertake in the past year?

N= 36

DIGITAL PLATFORMS

The **Industry Survey** found that the majority of businesses (75%) did not have an Australian Tourism Data Warehouse listing on VisitVictoria.com (Figure 59).

FIGURE 59 AUSTRALIAN TOURISM DATA WAREHOUSE LISTING BY % OF BUSINESSES

N= 36

Source: Visitor Economy Industry Survey - Does your business have an Australian Tourism Data Warehouse listing on VisitVictoria.com?

The majority of businesses (61%) also did not have online instant confirmation booking capability (Figure 60). There may be opportunity for businesses to improve their online booking capacity, however, the need for instant online bookings may not be relevant to all business respondents.

FIGURE 60 INSTANT ONLINE BOOKING CAPABILITY BY % OF BUSINESSES

Source: Visitor Economy Industry Survey – Q: Does your website have online instant confirmation booking capability?

N= 36

4.2.3. PACKAGING

VISITOR EXPERIENCES WITH OTHER WYNDHAM BUSINESSES

The majority of businesses who responded to the **Industry Survey** (75%) did not participate in any packaging of visitor experiences with other Wyndham businesses (Figure 61).

FIGURE 61 VISITOR EXPERIENCE PACKAGING BY % OF BUSINESSES

Source: Visitor Economy Industry Survey – Q: Does your business participate in any packaging of visitor experiences with other Wyndham businesses?

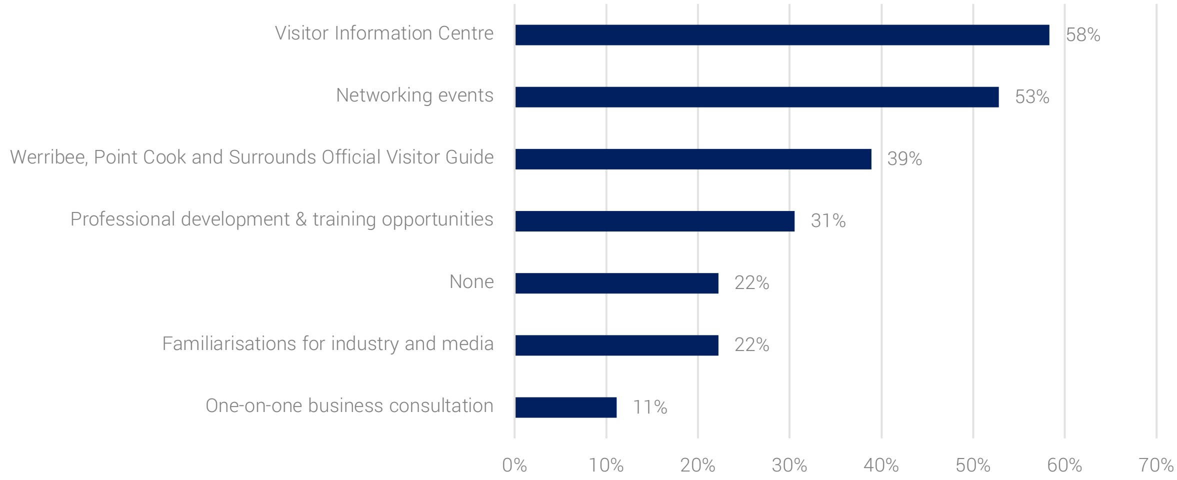
N= 36

4.2.4. COUNCIL SERVICES

CURRENT USE

The most popular services and activities provided by Council which were utilised by surveyed businesses included visitor information services (58%), networking events (53%) and/or Werribee, Point Cook and Surrounds Official Visitor Guide (39%).

FIGURE 62 WYNDHAM COUNCIL SERVICES AND ACTIVITIES PARTICIPATION BY % OF BUSINESSES



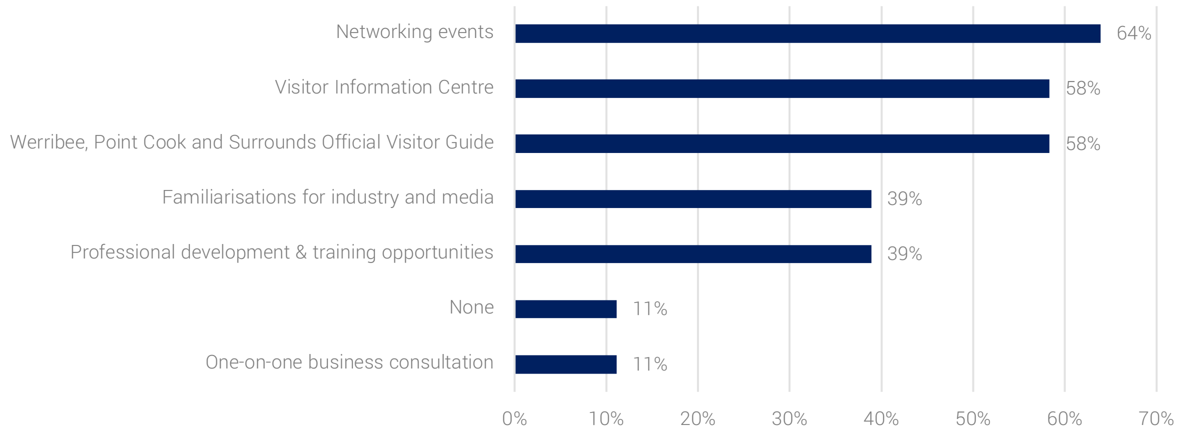
Source: Visitor Economy Industry Survey - Which of the following services/activities offered by Wyndham City do you currently participate in?

N= 36

FUTURE USE

Industry Survey respondents indicated the services and activities provided by Council that they would be likely to take up in the future include networking events (64%), Visitor Information Centre (58%) and/or Werribee, Point Cook and Surrounds Official Visitor Guide (58%).

FIGURE 63 FUTURE WYNDHAM COUNCIL SERVICES AND ACTIVITIES PARTICIPATION BY % OF BUSINESSES



Source: Visitor Economy Industry Survey - Which of the following services/activities offered by Wyndham City is your business likely to take up in the future?

N= 36

4.2.5. INDUSTRY SURVEY KEY FINDINGS

The following key findings relate to **Industry Survey** respondents:

- Business respondents were predominantly small businesses employing less than 10 employees, from a range of industries across the visitor economy. Key business categories included attractions, events and accommodation.
- Respondents indicated positive industry outlook, with over half (67%) of businesses surveyed indicating that they expected their revenue to grow over the next year, and 12% of business identifying that they saw economic growth and industry growth respectively as current major business opportunities.
- Key challenges identified by businesses, relating to tourism, included marketing, online shopping and cost of doing businesses.
- Businesses reported that there had generally been an increase in the number of visitors from all markets (i.e. locals, metro Melbourne, interstate and overseas), indicating ongoing growth in patronage from the visitor market supporting growth and investment in the tourism business sector.
- Businesses identified events, VFR, holiday/leisure and business as key motivators for visitation.
- The majority of business respondents were a member of a tourism association. The most popular tourism organisation was the Wyndham Business and Tourism Organisation.
- 'Experience Wyndham' as a destination brand was well utilised by respondents, with the majority (61%) utilising the brand to promote their business.
- A high proportion of businesses utilised social media to promote their business (83% of respondents). Almost 50% of businesses also indicated having paid for advertising on social media. The high level of business engagement with social media indicates the growing market preference for accessing information online as well as the ability for businesses to engage directly with their markets.
- There may be opportunity for businesses to improve their online booking capacity, however, the need for instant online bookings may not be relevant to all business respondents.
- A high proportion of businesses were not listed with VisitVictoria.com through the Australian Data Warehouse.
- Experience packaging with other businesses was also not well utilised amongst respondents, with only a quarter (25%) indicating they had participated in 'experience packaging' with other Wyndham businesses. There may be opportunity for greater packaging of experiences and products in future.
- Council services most utilised by business respondents include the visitor information centre, networking events, visitor guides and training and development opportunities. Networking events, the visitor information centre and official visitor guides were identified as key areas of future use by businesses.

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