VICTORIA UNIVERSITY OF TECHNOLOGY

(FOOTSCRAY INSTITUTE OF TECHNOLOGY)

FACULTY OF BUSINESS

THE PERCEPTIONS,HOLIDAY EXPECTATIONS AND HOLIDAY EXPERIENCES OF GERMAN SPEAKING VISITORS TO SOUTHERN AUSTRALIA

A MINOR THESIS PRESENTED IN CANDIDACY FOR THE DEGREE OF MASTER OF BUSINESS IN TOURISM DEVELOPMENT

PRESENTED BY

THOMAS G.BAUER

MELBOURNE,AUSTRALIA

1990

EXECUTIVE SUMMARY

The paper set out to identify some of the reasons why Australia's Southern States (Victoria,Tasmania and South Australia) do not attract as many German speaking visitors as Queensland and New South Wales.

It was hypothesised that Southern Australia was less attractive to German speaking visitors because of a perceived lack of well recognised major tourist attractions and the perceived lack of sunshine and warm climate.

Surveys of German speaking tour operators and of arriving German speaking visitors were carried out to gain a better understanding of their perceptions and holiday expectations of Southern Australia.

In addition a survey of departing German speaking visitors was carried out to establish their travel patterns and travel behaviour during their stay in Australia in general and Southern Australia in particular.

One of the main findings of the paper was that German speaking visitors are most interested in the natural attractions of Southern Australia and that European culture, fine dining and participating in sporting activities hold very little attraction for this particular market.

DECLARATION:

I Thomas Bauer herby declare that the presented work has not previously been submitted by me for the award of any other academic award.

Melbourne, December 1990

[redacted]

Thomas G. Bauer

HAPPINESS IS FOUND
ALONG THE WAY
NOT AT THE END
OF THE ROAD

Anon.

TABLE OF CONTENTS

ACKNOWLEDGMENTS

The author wishes to thank the following persons and organisations for their assistance in the preparation of this thesis:

Mr.Brian King,Principal Lecturer in Tourism,Victoria University of Technology,Melbourne.

QANTAS Airways in particular Mr. Laurie Cutts at Melbourne airport.

LAUDA AIR offices in Vienna and Sydney.

Dr. Joern Mundt,Studienkreis fuer Tourismus,Starnberg.

Tour operators in Germany,Austria and Switzerland who returned the survey questionnaires.

The computer department at V.U.T. in particular Ms. Josie De Marco.

List of Tables

Page

Page

SECTION 1

1.0 INTRODUCTION

The inbound Tourism industry is a relatively new phenomenon in Australia.It was not until Australia's Bicentennial Year in 1988 that visitor numbers to the country exceeded the two million mark.Of that total the most significant numbers were generated by visitors from New Zealand,Japan and the USA.

These markets will continue to grow and to be of significance for Australia.Nevertheless it would be prudent to expand existing small scale markets and to continue to search for new markets. By drawing visitors from a wider variety of countries Australia can avoid heavy dependence on visitors from a limited range of nations.In this way the potentially negative impact on the destination of an economic downturn in the major source country/ies can be reduced.

One market which has shown steady growth in arrival numbers over the past decade, but is still relatively small, is the German speaking market originating in the countries of Germany,Switzerland and Austria.

In its Strategic Marketing Plan [1] the Australian Tourist Commission (ATC) has recognised Germany and to a lesser extend Switzerland as high priority markets building upon the establishment of a Frankfurt office as early as the 1970's. These two countries are markets in which consumer advertising will continue in the future.

1 ATC Corporate Plan 1989/90-1993/94,ATC,Sydney (1989,p.6)

Germany,Switzerland and Austria combined form one of the major tourist generating regions of the world.Germans alone spend more dollars abroad than any other country in the world while the Swiss have the distinction of having the highest propensity to travel.Despite all their overseas travel only about 1% of German long-haul travel is to Australia.

Published research which would assist the various States of Australia to increase visitor arrival numbers from the German speaking market is scarce.The last ATC Market Brief dedicated exclusively to the German market was produced as far back as 1982.The next study on that market was not undertaken until February 1990.In that study the country was included in a European Market Brief. To the author's knowledge little or no specific research on the German speaking market has been carried out in Australia that goes beyond an analysis of data available through the International Visitor Survey.This lack of research is in contrast to the abundance of research carried out into the Asian and in particular the Japanese market.
This study therefore hopes to contribute to our knowledge of the German speaking market .Rather than attempting to study travel to Australia by German speakers in general,the study concentrates on the region of the country where German speaking visitor arrivals and visitor nights are the lowest -namely the states of Victoria, Tasmania and South Australia.This concentration has a commercial

applicability in view of the pooling of overseas marketing expenditures by Victoria and Tasmania. The study hopes to contribute to a better understanding of what German visitors expect out of a holiday in Southern Australia and through the results to contribute to an increase in visitor arrivals to these states.

The study also attempts to shed some light on the reasons behind the lack of popularity of the three states amongst German speaking visitors.In this context,images and perceptions of a destination,whether they are correct or incorrect,have a significant influence on the actual travel patterns of travellers.These images can be formed in a variety of ways. News stories,media reports,TV and radio programmes,advertising, travel stories in magazines and through the depiction of a destination in the brochures of tour operators,are all examples of such image building.

By virtue of including a destination in their programmes,tour operators assist the consumer in preselecting regions of a country that are worth visiting.As a result these regions often experience an increase in visitor arrivals from the relevant generating country or region .In contrast where certain regions of a country are given minimal coverage in the programmes of tour operators the consumer are less aware of the region and hence in the pre-planning stage of his/her holiday does not include the particular region into his/her itinerary.

Realising the significance of tour operators in creating positive images of a region the author decided to structure the study in such a way that German speaking tour operators views on Southern Australia would be sought and these could be contrasted with the perceptions ,expectations and experiences of German speaking visitors themselves to Southern Australia.By doing this it was hoped that a clearer picture would emerge as to why Southern Australia was not able to attract a larger share of the German speaking market.

2.0 HYPOTHESES

The hypotheses underlying this paper are that far fewer German speaking visitors visit Southern Australia compared to Queensland and New South Wales because Southern Australia is perceived as

a) being unable to offer well recognised major tourist attractions and
b) lacking sunshine and a warm climate.

It is hypothesised that in the minds of potential German speaking visitors, Southern Australia at this stage of its development, lacks some of the key features of an attractive long-haul destination.

The paper also examines the extent to which the perception is accurate, and whether it constitutes a fundamental impediment to the development of the German speaking market.

3.0 METHODOLOGY

Having defined the objective of the research the next step was to select the most appropriate research techniques in order to achieve the set objective.

Secondary data collection

Firstly the author gained an overview of the secondary data available on the German speaking market.This included a review of the statistical data available in the International Visitor Survey in Australia and data published by the Studienkreis fuer Tourismus [Studygroup for Tourism] in Germany.Furthermore a computer literature search was carried out in order to identify similar studies that might have been carried out elsewhere.Reviews of tourism journals such as, the Annals of Tourism Research,Journal of Travel Research and Tourism Management were also carried out and a number of relevant studies were identified (e.g. Kale & Weir 1986; Teye 1989; Phelps 1986 and Mc Lellan & Foushee 1983).

Primary data collection

For a study into perceptions and expectations of visitors from a particular part of the world (Germany,Switzerland and Austria) to a specific region of the world (Southern Australia) it was clearly not sufficient to rely solely on secondary data. It was therefore necessary to select the most appropriate and effective technique to gather primary data.
Several techniques could potentially have been used.The first two of the following techniques were investigated,but were rejected as unsuitable for the task at hand.

Observational Method

To use the observational method in order to answer for example the question of where German visitors were going in the Southern States would have required the author to observe a number of attractions in the three states and to hope that German speaking visitors would be present.Clearly this was not a feasible method of data collection in view of the small numbers of this limited target market that would be present at any one attraction at one time.In addition this method would not have answered the question whether visitor had known about the particular attraction before.

Experimental Method

As in physics or chemistry the experimental method requires the setting up of tests,models or experiments to simulate a situation that is comparable to the real world.Given the nature of the study,the geographic distance from the actual target group and the difficulty in setting up such an experiment the use of the experimental method was not considered appropriate for this study.

Survey Method

The survey method also known as the questionnaire technique is one of the techniques most often applied in tourism research .Given the nature of the proposed study which involved seeking the opinions of various geographically dispersed groups of people,the author decided to proceed with this technique in order to obtain the necessary primary data.
Three surveys were considered necessary in order to gain a comprehensive view of perceptions,expectations and experiences of the German speaking market.

The following surveys were carried out:

1. Survey of German speaking tour operators

In order to establish what knowledge tour operators had of Southern Australia as a tourist destination and also to identify what tour operators thought their clients wanted out of a holiday in Southern Australia,a mail survey of West German,Austrian and Swiss tour operators was conducted during August/September 1989.

2.Inbound survey of German speaking visitors

The author planned to measure the perceptions and expectations which German speaking visitors had of Southern Australia prior to their arrival in Australia.

Initially it was hoped that this survey would be carried out with assistance from LUFTHANSA German Airlines and QANTAS Airways . Each was approached with a request to distribute questionnaires in flight from Frankfurt to Melbourne. Due to logistical and administrative difficulties neither airline was able to assist.

In response to this obstacle, a new approach for the collection of the inbound data concerning the perceptions and holiday expectations had to be taken.

With the assistance of QANTAS, the author gained access to the arrival gates at Melbourne Airport during November/ December 1989 where envelopes containing the inbound survey questionnaire, the outbound survey questionnaire and a prepaid reply envelope, was handed out to German speaking visitors arriving on flights from Frankfurt.Passengers were approached and were asked in their native German to complete the inbound questionnaire within 48 hours of their arrival, and to return it to the author in the prepaid envelope.

Due to the inconvenience it would have caused the arriving passengers after a 22 hour flight, no personal interviews took place.

To increase the sample size the author approached LAUDA AIR, who after prolonged correspondence,agreed to distribute questionnaires in flight.In February 1990, LAUDA AIR distributed 50 inbound questionnaires on a flight from Vienna to Sydney. Due to various problems including the unwillingness of passengers to fill in the questionnaire no responses were received .

Still trying to increase the sample size the author approached QANTAS who kindly agreed to airlift 60 inbound questionnaires to Frankfurt and have them handed out to passengers boarding their flight to Melbourne. The exercise was carried out in December 1989, but unfortunately, no responses were received.The procedure was repeated in July 1990, with the same negative result.

2. Outbound survey of German speaking visitors

The outbound survey was designed to capture the actual holiday experiences and travel patterns of the German speaking visitors.Similar data collection problems as with the inbound survey arose from the inability of QANTAS and LUFTHANSA to distribute questionnaires on their outbound flights from Melbourne/Sydney to Frankfurt.It therefore became necessary to collect data in a different manner. This was achieved with the assistance of QANTAS, who during November/ December 1989 enabled the author to approach

passengers leaving Melbourne Airport at the departure gates.A number of personal interviews were carried out to identify the holiday experiences and travel patterns of these visitors. The major difficulty during the data collection process was the problem of differentiating German speaking passengers in a crowd of over a hundred passengers departing on the same flight.The number of German speaking passengers on most of the flights surveyed was quite small which made identification even more difficult.

In addition to personal interviews with departing passengers, passengers arriving at Melbourne Airport were handed an envelope, which contained an outbound questionnaire which was to be sent back to the author in the prepaid envelope prior to the visitor leaving Australia.This would have enabled the author to directly compare the perceptions and expectations of visitors with their actual holiday experiences during their stay in Southern Australia. Due to the length of stay of the German speaking visitors [average length of stay is 41 days (IVS 1988)] and the obvious inconvenience of having to carry around an envelope with a questionnaire , only very few replies were received from this data collection process .It was noted that the majority of outbound questionnaires that were received through this method of collection had obviously come from people who were on a Visiting Friends and Relatives visit.

In December 1989,having realised that the number of responses was relatively small,the author approached LAUDA AIR for assistance who in February 1990 agreed to distribute 50 questionnaires on an outbound flight from Sydney to Vienna.The distribution took place on 24 February 1990 . 16 responses were received but unfortunately, the inbound and outbound questionnaires had been mixed so that visitors responded to some inbound and some outbound questions thus greatly reducing the usefulness of the responses. The author decided therefore not to include the results of this survey into the sample.

In July 1990, Lauda Air kindly agreed to repeat the questionnaire distribution on an outbound flight.
However despite their best efforts, they could not get any passenger to fill in the questionnaire.This may be partially explained by the fact that many Eastern European travellers use LAUDA AIR and hence, may not have understood the questionnaire which was written in German.

4.0 LIMITATIONS OF THE INBOUND - AND OUTBOUND SURVEYS

As a result of the various difficulties outlined above,the conclusions of the inbound and outbound surveys are based on a somewhat limited sample.The author acknowledges this fact and urges that the results be treated with caution. A larger sample would be required to validate the findings.

A second limitation is the bias towards German nationals. Whilst the author set out to profile the German,Austrian and Swiss inbound market, into Southern Australia,the vast majority of responses recorded were those of German visitors thus creating a bias towards that particular market.This is in line however, with the dominance of German visitor arrivals to the region.

SECTION 2

5.0 THE GERMAN SPEAKING MARKET

The rationale for a study where consumers are classified by their native language is as follows:unlike many other language groups where the population is dispersed, the German speaking countries are geographically and historically close.It can be seen as likely therefore that consumers from these countries share similar values and hence holiday preferences. Spanish to give one example, is spoken in Europe,Central-and South America - in countries that are economically,geographically and culturally diverse.In contrast the German speaking countries of Germany,Austria and Switzerland are relatively homogeneous.The economic conditions in the three countries are similar and the standard of living is comparable.The number of annual paid holidays is by world standards extremely high with the average German for example having an entitlement of approximately 6 weeks of paid annual leave.The fact that all three countries share borders and incorporate an Alpine area further strengthens the concept of one relatively homogeneous market .At the same time, the author concedes that most German nationals live at a distance from the Alpine region and may therefore, have different holiday preferences to those who actually live in or near that region.It is interesting to note that for domestic tourism in Germany the Alpine region of Bavaria is the country's most popular region (Reiseanalyse 1988).

6.0 PROFILES OF GERMANY,AUSTRIA AND SWITZERLAND

A general understanding of the three countrie's economic background,the population and their propensity to travel of is useful in order to appreciate better their importance as tourist generating countries for Australia, and for Southern Australia in particular.Table 1 shows the size of the German as opposed to the Austrian and Swiss markets.During 1988, 31.6 million Germans travelled against 3.2 million Austrians and 4.9 million Swiss. In view of this huge number of holidaymakers the number of German visitors to Australia as a percentage of overall German travel activity is minimal (0.17%).The proportion is almost threefold for the Swiss (0.53% of all Swiss travel was to Australia) and travel to Australia represented 0.28% of all Austrian travel.

TABLE 1

BACKGROUND DATA FOR THE GERMAN SPEAKING MARKET

	Germany	Austria	Switzerland
GDP(1986)in US $	14,600	12,400	14,075 [a]
Population(m)	48.7 [b].	7.5	5.7 [c].
Net Travel -(%)	65%	42%	75% [d].
Propensity (m)	31.6	3.2	4.9
Main months of travel	July/ August June	July/ August	May to October
% of holidays taken in that period	65	51	64
Independent vs Group-travel	61:39	75:25	66:33

a.1985 figure

b.Population of West Germany including West Berlin above 14 years of age living in private households and possessing German citizenship

c.Population of Swiss citizens and "assimilated" foreigners between the ages of 0 and 79 living in private households

d.1986 percentage

Source:Tourism in Europe,<u>Studienkreis fuer Tourismus,Starnberg</u>,(1989)

6.1 West Germany

The most respected and authoritative source of the travel behaviour of the German holidaymaker is the annual Reiseanalyse conducted by the Studienkreis fuer Tourismus in Starnberg. The following is a summary of those parts of the Reiseanlayse that may be of importance to Australia as a tourist destination and that may assist in a better understanding of the German holiday market. [2]
[all figures relate to 1988].

Number of Germans undertaking a holiday trip in 1988:

31.6 million which equals 64.9% of the population of above 14 years of age.

Sex of holiday makers:

16.2 million women against 15.4 million men undertook one or more holiday trips of five days or more.Expressed as travel intensity (percentage of population that undertook a holiday) men accounted for 67.9% and women for 62.4% which means that 5.5% more man undertook one or more holiday trips.

Mode of transport:

22% used the plane but out of these only 5.6% used scheduled airlines with the rest using charter flights.

[2] Mundt,J.W.,Urlaubsreisen 1988.Einige Ergebnisse der Reiseanalyse 1988.Kurzfassung.StfT (1989,p.16)

TABLE 2

Age of German holiday makers

Age in years	%	Million	Base in m
14-19	76.0	3.0	5.1
20-29	66.3	5.8	8.7
30-39	72.2	5.0	6.9
40-49	75.7	6.3	8.3
50-59	54.3	4.7	7.3
60-69	54.3	3.1	5.6
70-79	45.2	2.4	5.2
80 plus	38.8	0.6	1.5

Source: Reiseanalyse 1988, Studienkreis fuer Tourismus

Travel motivations and holiday expectations:

For successful destination marketing to take place, it is vital that the travel motivations and holiday expectations of the target market are understood .

Mundt (1989) states that:

> In general the [German] holidaymaker has a whole bundle of needs and expectations with regard to his holiday trip. On average 10.2 different aspects were mentioned [in the 1988 Reiseanalyse].Motives and expectations may have their origins either in a variety of needs such as the need for nature,for social interaction or mental regeneration or they can belong to just one aspect such as physical recreation through plenty of rest,light exercise,good food or the enjoyment of the sun.[3]

The most important holiday expectations of German travellers [number of holidaymakers 31,600,000 in 1988] were:

* to relax (71.7%)
* escape the everyday life (66.9%)
* gather "new strength" (57.2%)
* experience nature (52.5%)
* to have time for each other (49.5%)
* to eat well (43.2%)
* to escape to the sun (42.7%)
* to be together with other people (41.3%)
* to have fun (40.6%)

[3] Mundt,J.W.,Urlaubsreisen 1988,Einige Ergebnisse der Reiseanalyse 1988,Kurzfassung ,StfT,(1989,p.31)

6.1.1.The West German Long Haul Market

The West German outbound market is the most significant of the three markets under consideration.A more detailed look at this particular market is therefore warranted.

PATA Travel News,page 24, June 1988 quoting a STERN report Brand Profiles 2, published by GRUNER & JAHR stated that:

> the German Tourist,it would appear ,does not have a very adventurous soul.No matter how yearningly Teutons may dream of those romantic faraway places with the strange-sounding names,in reality,very few of them have ventured that far off the beaten track.

The majority of German travel is to destinations within Europe. The total market size in 1987 was 39.27 million out of which only 3% visited Asia and one percent Australasia.The STERN survey found however, that the Asia/Pacific area is of great potential interest to Germans. It found that 440,000 Germans stated that Malaysia, Indonesia, Thailand ,the Philippines and Singapore were potential holiday destinations for them during the years 1988-1991. Australia and New Zealand were the next most popular potential destinations with 360,000 Germans indicating that they would like to visit the region.

Regarding the background of the potential German long-haul travellers the GRUNER&JAHR report states that these travellers are experienced and that they are most commonly found in households with a net monthly income of DM 3,000 (AUD 2,400) and above.

In 1986, Germans undertook 1,500,000 trips to long-haul destinations(Studienkreis fuer Tourismus,1986).
A look at some demographic data of German travellers (N=39.2 million) may be useful:

Income of DM 4,000 or more:
15% of all travellers, 33% of long-haul travellers, 48% of those who have travelled in PATA areas.

University Education:
12% of all travellers,40% of long-haul travellers and 36% of those who have travelled to PATA areas had a University education.

Source:
Hahn,H.& Schramm E.,Studienkreis fuer Tourismus e.V.,Starnberg in Fremdenverkehrs Wirtschaft International Nr.3 (February 1988,p.8)

6.1.2. What image does the ASIA/Pacific region have with the German traveller?

"Expectations and fears determine the images which German travellers have of long-haul destinations. Actual long-haul travellers are usually very experienced and very mobile travellers." [4]Hahn and Schramm(1988)[5] citing a PATA study state the expectations that German long-haul travellers have of an Asian holiday as follows:

* to get to know foreign people and countries,and to learn to understand their mentality
* to see things that are new,strange and different
* prestige [of having visited a destination]
* thirst for adventure
* to escape from the climate and weather

Climate at the destination was an important factor in the decision making process of respondents.For 40% of respondents, climate was the reason why they selected a time of year for their long-haul holiday that is not the normal peak travel season in Germany(the month of June to August).

[4] Hahn,H.& Schramm E.,<u>in Fremdenverkehrs Wirtschaft International,Nr.3.</u>(1988, p. 8)

[5] ibid

Reasons for not selecting a long-haul destination included:

* too expensive;don't want to spend the money necessary for such a trip
* fear of exotic diseases
* fear of the new and unknown
* creature comfort-flights are too long
* fear for personal safety

38% of respondents booked only their flights to and from the destination.

50% don't just want to see one country on their long-haul holiday.

Australia and New Zealand as a destination are relatively well known among most respondents.They do however have a quite different image from the destinations in Asia.
For the holidaymaker these two destinations are particularly interesting because of their scenery,the ocean and the climate.Also of interest are the flora and fauna ,whereas no great expectations exist regarding the cultural aspect.

6.1.3. WHAT ATTRACTS GERMAN LONG HAUL TRAVELLERS? THE CASE OF CANADA.

A Canadian study based on 1,482 interviews in West Germany, (Dybka 1988) found that :

> Canada's attraction to West German visitors is accounted for in large part by the higher than average proportion of travellers who experience Canada's scenery and outdoor activities ,such as parks,forests,wilderness areas,mountains,wildlife, and birdwatching.
> The positive outdoors image is however somewhat limited,as it fails to extend to beaches or reliable weather.

The most desired features of an overseas destination,from the West German perspective are:

* friendly people
* good climate
* comfort
* reasonable cost

A typical long-haul pleasure trip leaves Germany mainly in the Summer,but Spring is also popular,and lasts about 27 nights.The traveller chooses the destination about 27 weeks before departure,largely in consultation with a travel agent,but also using: friends, family,brochures and pamphlets; as sources of information.
Travel parties are small: 33% travel alone,33% with one other person.Children are rarely included on overseas trips.

6.2 Switzerland

The second most important German speaking tourist-generating country for Australia is Switzerland.Although the country has only a total population of a little over 6.5 million, its citizens have developed a great desire to travel.In 1986, (last data available) the net travel intensity was 75% or 4.9 million.This travel intensity was the highest in the world.[6]Given the land-locked nature of Switzerland, it is obvious that the vast majority of holiday trips (63% in 1984) are taken to neighbouring countries.

During 1988 Australia welcomed 26,000 Swiss visitors.Considering the small population base of Switzerland this number reflects a fairly high percentage.

[6] Cockerell,N. in Travel and Tourism Analyst,Feb.1987 pg.23

6.3 Austria

Austria as a tourist generating country, is at this stage of somewhat limited significance to Australia with only 9,100 arrivals being recorded in 1988. The number of arrivals has however increased significantly over the past decade.In 1980 Australia welcomed only 3,321 Austriars .This figure had increased to 6,400 by 1987 and had jumped to 9,119 by 1988. The dramatic increase of arrivals between 1987 and 1988 can most likely be explained by the introduction of LAUDA AIR's direct flights from Vienna to Sydney. The frequency of these flights will be increased in the future and plans exist for the inclusion of Melbourne as a destination.

7.0 LONG HAUL TRAVEL BY GERMAN SPEAKING TRAVELLERS

TABLE 3

GERMAN,AUSTRIAN AND SWISS VISITOR ARRIVALS AT MAJOR LONG-HAUL DESTINATIONS (1988)

Destination	GERMANY	AUSTRIA	SWITZERLAND
Australia	65,500	9,100	26,000
Canada	267,800	23,300	76,000
China	68,939	N.A.	16,990a
Hong Kong	123,737	18,572	44,481
India	76,371	10,449	31,147
Japan	56,941	6,673	16,433
Korea	30,561	3,421	6,857
Malaysia	29,552	N.A.	10,653
Maldives	40,855	6,563	9,853
New Zealand	19,909	2,044	8,494
Philippines	27,399	3,360	9,983
Singapore	118,300	19,200	56,400
South Africa	65,355	7,588	14,226
Sri Lanka	41,006	3,976	3,736
Thailand	188,040	33,531	62,179
USA	1,153,356	102,649	282,588

a. 1987 figure

Source:WTO,Current Travel and Tourism Indicators,
May 1989

Table 3 reveals an interesting consistency regarding the popularity of destinations among the travellers of the three countries.The USA is the most popular long-haul destination for all three countries followed by Canada, which is ranked number two with Germans and Swiss and number three, with Austrians.

It can be hypothesised that the relative close proximity of the USA and Canada to Europe ,the ease and relative inexpensiveness of access to them, as well as a strong VFR market, account for the popularity of these destinations.

Dybka(1988) citing a joint Canadian - USA research project,attributes Canada's attraction to the German market to "its scenery and outdoor activities such as parks, forests, wilderness areas, mountains, wildlife, and birdwatching."This assessment of the German preferences may well be useful for the positioning of Southern Australia where all the above features can be found.

For many German speaking travellers, the USA and Canada would represent an easily reached and easily travelled destination.The awareness level of these two destinations is high and their cultures while different from the ones in Germany,Austria and Switzerland,are nevertheless "familiar".

The same cannot be said for the following Asian countries which ranked highly in popularity as holiday destinations.

TABLE 4

RANKING OF ASIAN COUNTRIES AS HOLIDAY DESTINATIONS FOR GERMAN SPEAKING VISITORS

	Germans	Austrians	Swiss
Thailand:	3	2	3
Hong Kong:	4	5	5
Singapore:	5	4	4
India:	6	6	6
China:	7	N.A.	8

The above destinations all show higher numbers of arrivals from the German speaking countries than Australia which ranked only 8th with Germans and 7th with Austrians and Swiss. When combined, the five most highly ranked Asian destinations attracted 575,387 German, 81,752 (excluding China) Austrian,and 211,206 Swiss visitors during 1988. In addition,Asian destinations such as Malaysia,Japan, Korea,the Maldives and Sri Lanka showed

considerable numbers of visitor arrivals from the German speaking countries.Compared to the arrival figures in Asian destinations, the number of German (65,500), Austrian(9,100) and Swiss (26,000) arrivals in Australia during 1988 must be considered very modest.
The popularity of Asia as a tourist destination for German speaking tourists may however, ultimately benefit Australia,and in particular the Southern States.If made aware of Australia's relative close proximity to South East Asia,a percentage of German speaking travellers may be enticed to combine a visit to South East Asia with a visit to Australia. This consideration is in contrast to the popular Australian perspective which sees Australia as the main destination and the countries of South East Asia as constituting stop - over destinations en route to an Australian holiday.

The advantage for the Southern States can be seen in the fact that the countries of South East Asia mainly provide holiday opportunities based on sun,sea and sand .After spending a number of weeks on Thailand's beaches a visit to the more temperate climate of Southern Australia may be seen as a welcome contrast. Rather than spending another three weeks on a beach in Queensland, a percentage of visitors may be attracted to attractions such as the Victorian Alps,Wilsons Promontory,the wine growing regions of Victoria and South Australia or the National Parks of Tasmania.

SECTION 3

8.0 PROFILES OF THE SOUTHERN STATES

8.1 VICTORIA

Victoria is the smallest Australian mainland state. It is located in the South of the island continent and is bordered by Bass Strait and the Southern Ocean in the South and the Murray River in the North.It covers 227,600 square kilometres and has a population of 4.2 million (Victorian Tourism Commission 1990). With a population of 2.9 million, its capital Melbourne, is Australia's second largest city.

The climate can be considered temperate with mild winters and warm to hot summers.

The major attraction of Victoria for the overseas visitor would have to be its compactness in which a wide variety of uniquely Australian attractions can be experienced in a small area.Most attractions in Victoria are easily reached from Melbourne within a few hours drive. The major tourist attractions of Victoria would include the city of Melbourne with its culture,gardens and special events like: the Ford Australian Open ,the Melbourne Cup and the AFL Grand Final ,and its fine food and excellent accommodation.

In country Victoria, the major attractions are based on nature. They include: the 33 National Parks, the Penguin Parade on Phillip Island ,the Great Ocean Road with its fantastic surf beaches ,the High Country in the Victorian Alps, the river Murray, and the numerous wineries of Victoria's North East to name a few.Snow skiing in the Victorian Alps is another added attraction of the state and probably one that not many German speaking visitors are aware of.

37% of all international visitors visited Victoria in 1988 for at least one night (IVS 1988), with German (42%) and Swiss (53%) visitors showing above average figures. The Swiss percentage of visitors who spent at least one night in Victoria was actually the highest of any country recorded in the 1988 International Visitor Survey which on the surface would indicate the popularity of the state .While only 5% of German visitors to the state ventured outside Melbourne this figure was a relatively high 9% for Swiss visitors (IVS 1988), making the Swiss the most likely visitors to country Victoria of all the international visitors.

International access to Victoria is relatively easy with regular flights from Frankfurt (presumably serving also the Swiss and Austrian markets to a certain degree) on LUFTHANSA and QANTAS as well as several Asian carriers.

8.2 SOUTH AUSTRALIA

South Australia covers 984,375 square kilometres and has a population of approximately 1.5 million (Tourism South Australia 1990).Its capital and main commercial centre is Adelaide which is located in the South of the state and which has a population of just over 1 million.

The state's major attractions for international visitors in general and German speaking visitors in particular would include: the wine growing regions of the Barossa Valley with its strong German heritage;Hahndorf which likewise displays its German heritage (if historically somewhat inaccurate since it portrays itself in a Bavarian fashion when in fact it was established by settlers from Silesia);the natural beauty of the Flinders Ranges, the wildlife of Kangaroo Island ;the long ocean beaches; the vastness of the outback with towns like Coober Pedy adding a special attraction.

Unfortunately, not many German speaking visitor spend nights outside Adelaide with the IVS figure for 1988 being only 5% for Germans and 1% for Swiss (no figures available for Austrians).

8.3 TASMANIA

Tasmania,an island in the Southern Ocean is the smallest state in Australia. Its capital Hobart, with a population of approximately 180,000 is also the smallest capital city of all the states.

In 1988, only three percent of all international visitors visited Tasmania.4% of all German visitors and a relatively high 7% of Swiss visitors were attracted to the island in 1988.

Tourism Tasmania was approached in March 1989 regarding information pertaining to accurate visitor numbers for the German market. No such break-up by ethnic origin existed.The total number of European visitors to Tasmania in 1986 was less than 7,500, and the vast majority of these were from England (letter from Mr. J. Koldowski, Research Manager,Tourism Tasmania].

Tasmania's major attractions are its history (e.g. Port Arthur), its casinos in Hobart and Launceston and in particular its nature. Places like Cradle Mt.-Lake St.Clair National Park and South West National Park offer a unique remoteness in a bustling world.Visitors may also be attracted to these areas because of their listings on the World Heritage list.

Given the natural beauty of Tasmania the small number of visitors to the island state is even more surprising, but it can possibly be attributed to the fact that Tasmania as a tourist destination is relatively unknown to German speaking travellers.The fact that 7% of Swiss spend at least one night there is probably a result of the perceived similarities between Switzerland and Tasmania in the minds of the Swiss travellers.Travellers may often be attracted by landscapes which are similar to those in the country of their origin,especially if these landscapes can be found far away from home and on the other side of the world.

SECTION 4

9.0 BACKGROUND DATA FOR GERMAN SPEAKING VISITORS TO AUSTRALIA

TABLE 5

VISITOR ARRIVALS TO AUSTRALIA FROM GERMAN SPEAKING COUNTRIES

Country	1980	1985	1986	1987	1988	1989
Germany	35,379	37,329	41,869	53,259	65,913	68,100
Austria	3,321	4,227	5,104	6,400	9,119	9,200
Switzer-land	7,730	14,262	16,880	21,341	25,958	27,400
TOTAL	46,430	55,818	63,853	81,000	100,990	104,700

Source: ABS Catalogue No.3401.0 and BTR

German arrivals in 1989 amounted to 2.9% of all arrivals. While this percentage might seem relatively small, it is important to note that since Germans spent an average of 42 days in Australia (compared to 9 nights for Japanese and 25 nights for American visitors), their economic impact can be significant.

Unfortunately for the Australian accommodation industry, 50% of German visitors stayed with friends and /or relatives thus greatly reducing their potential economic impact. This figure is surprising given that only 18.2% stated that they came to Australia to visit friends and relatives (IVS 1988).Out of those visitors that did use commercial accommodation,11% used hotels with facilities, 8 % used a motel,9% used rented houses or flats and 8% used youth hostels.

German visitors spent an average of $54.00 per night of stay(IVS 1988) for an average expenditure over their total average length of stay of $ 2,214.00. Thus, the total spending by German visitors during 1988 would be approximately $ 145.9 million.

Swiss visitors numbered 26,000 in 1988 . Like the Germans, the length of stay of Swiss visitors to Australia is considerable. On average they stayed for 42 days spending approximately $ 64.00 per night for a total of $ 2704.00 per visitor.This amounted to a total expenditure by all Swiss visitors of $ 70.3 million .

Arrivals from German speaking countries in 1989 slightly exceeded arrivals in 1988. German arrivals rose by 2,187,Austrian arrivals increased by 81 and Swiss arrivals increased by 1,442.For a detailed breakdown of the travel behaviour of German speaking visitors, refer to Appendix A.

TABLE 6

GERMAN SPEAKING VISITOR ARRIVALS TO AUSTRALIA
1988 (BY MONTH)

Month	Germany	Austria	Switzerland
Jan.	6,600	1,200	2,600
Feb.	8,600	1,100	2,900
March	6,400	600	2,200
April	3,500	400	1,800
May	2,700	500	1,200
June	2,300	400	1,000
July	5,700	800	1,900
August	4,100	500	1,200
September	4,300	600	1,600
October	6,700	800	2,800
November	6,700	1,000	3,000
December	8,300	1,100	3,700
TOTAL	65,900	9,000	25,900

Source: Current Travel and Tourism Indicators,WTO Madrid, August 1989.(Figures rounded to the nearest hundred)

Table 6 shows that the months between October and March attracted the majority of German visitors.The only other somewhat outstanding month was July (one of the main Summer vacation month in Germany).
The months from October to March are characterised by generally cold climatic conditions and the "escape "to the sunshine of Australia may account for the relatively high numbers of arrivals during these six month.
This observation may be of importance when positioning Southern Australia which is generally perceived as not to have the same amount of sunshine as for example, Queensland.

An opportunity exists here to raise the awareness in the German speaking market that in fact, parts of the three Southern states have more days of sunshine during this period than other more popular parts of the country.

Tables 7 and 8 give an overview over the passenger arrivals and departures from and to Frankfurt.

TABLE 7

AIR PASSENGER ARRIVALS FROM FRANKFURT TO AUSTRALIA

	1987/88	%	1988/89	%
FRANKFURT - MELBOURNE	19,132	37.1	21,479	36.6
FRANKFURT - SYDNEY	26,714	52.8	29,596	50.5
TOTAL FRANKFURT - AUSTRALIA	51,539	100.0	58,660	100.0

TABLE 8

AIR PASSENGER DEPARTURES FROM AUSTRALIA TO FRANKFURT

	1987/88	%	1988/89	%
MELBOURNE -FRANKFURT	16,894	35.3	20,058	35.7
SYDNEY - FRANKFURT	24,302	54.1	27,103	48.2
TOTAL AUSTRALIA-FRANKFURT	47,886	100.0	56,240	100.0

SOURCE: Department of Transport and Communications, April 1990

TABLE 9

PURPOSE OF VISIT TO AUSTRALIA BY GERMAN SPEAKING VISITORS IN 1988

	Germans	%	Austrians		Swiss	%
Holiday	39.800	60.4	N.A.		18,000	69.2
VFR	12,000	18.2	N.A.		3,400	13.1
Business	6,800	10.3	N.A.		1,900	7.3
Other	7,300	11.1	N.A.		2,700	10.4
Total	65,900	100.0	9,000	100.0	26,000	100.0

Source: IVS 1988,BTR,Canberra

TABLE 10

AVERAGE EXPENDITURE AND LENGTH OF STAY OF GERMAN SPEAKING VISITORS IN 1988

	A$	DAYS
Germans	2,175	41
Austrians	N.A.	N.A.
Swiss	2,704	42

Source: IVS 1988, BTR

TABLE 11

SELECTED REGIONS OF STAY BY GERMAN SPEAKING VISITORS IN 1988 (BY VISITORS)

Region of stay (visitors)	Country of residence		
	Germany	Austria	Switzerland
New South Wales	76%	N.A.	83%
Queensland	59%	N.A.	64%
Victoria	42%	N.A.	53%
South Australia	33%	N.A.	37%
Tasmania	4%	N.A.	7%

Source: Compiled from IVS 1988, Bureau of Tourism Research

Table 11 shows that for example 43% of all German visitors spent at least one night in Victoria, when at the same time 76% spent at least one night in New South Wales.

Using the percentages in Table 11, the actual numbers of visitors to the various states were:

TABLE 12

VISITOR NUMBERS IN SELECTED STATES

	Germany	Austria	Switzerland
New South Wales	49,425	N.A.	22,100
Queensland	37,563	N.A.	16,640
Victoria	28,337	N.A.	13,520
South Australia	20,429	N.A.	9,360
Tasmania	2,636	N.A.	1,820

Table 12 illustrates in absolute numbers the scale on which the Southern states are missing out on German speaking visitors.

TABLE 13

REGION OF STAY OF GERMAN SPEAKING VISITORS TO AUSTRALIA IN 1988 (BY VISITOR NIGHTS)

Region of stay	Country of residence		
	Germany	Austria	Switzerland
Queensland	31%	N.A.	29%
N.S.W.	27%	N.A.	30%
Victoria	15%	N.A.	14%
South Australia	11%	N.A.	7%
Tasmania	2%	N.A.	3%

Source: Compiled from Data in the BTR 1988 Visitors Survey.

In combination tables 11,12 and 13 give a clearer picture of the lack of popularity of the Southern States with the German speaking visitors.While 42% or 27,678 German visitors spent at least one night in Victoria in 1988, the state only accounted for 15% of the total visitor nights spent in Australia. Since it is length of stay at a destination that determines the size of the economic impact, this low percentage further indicates how Victoria is missing out on German visitors.

Read in conjunction with the fact that 12% of those visitor nights were spent in Melbourne leaving only 3% for country Victoria the fact becomes clear that Victoria as a whole is only seen as a very short stop-over not as a destination in its own right.

The picture is similar for South Australia (11% of German visitor nights and 7% of Swiss visitor nights) and Tasmania with a low of 2% of German and 3% of Swiss visitor nights respectively.

How far behind in popularity these states are, becomes clear when the figures are compared with the most popular Australian destinations for German speaking visitors, Queensland and New South Wales.31% of all German visitor nights and 29% of all Swiss visitor nights were spent in Queensland, and 27% of all German visitor nights and 30% of all Swiss visitor nights were spent in New South Wales.Given the extended length of stay of these two markets (mean nights in Australia by Germans were 41 and by Swiss 42 in 1988), these figures underline the economic importance of the German speaking market.

SECTION 5

10.0 SURVEY OF GERMAN,AUSTRIAN AND SWISS TOUR OPERATORS

10.1 Background to the survey

Tour operators play an important role in influencing the holiday decisions of tourists.Through their knowledge and their perceptions of a destination they can significantly contribute to the success or failure of a destination.
Tour operators by virtue of the inclusion of a certain destination into their programmes and brochures create interest into the particular destination in the minds of the potential visitors.Since potential travellers often use tour brochures as sources of information to inform themselves about the 'highlights' of a certain destination,it is vital that a destination is featured in as many tour programmes as possible.After analysing the content of a number of brochures of German speaking tour operators ,the author found that destinations in Southern Australia were unfortunately not included in many itineraries.

Mc Lellan and Foushee[1983] in their study on the negative images of the United States as expressed by overseas tour operators further highlighted importance of the opinions of tour operators for the successful marketing of a tourist destination.

In 1988 a survey among German tour operators was carried out to determine their views on potential growth in the Asian/Pacific region and whether new destinations could still be discovered.[7] One large tour operator commented that a further increase in the German long haul market was likely to the following countries: Thailand, Maldives, Indonesia,Korea ,Australia,New Zealand and China. He went on to say that generally speaking his company's strategy does not allow them to experiment with their client potential,hence they rely on the proven beach destinations with the possibility of attractive tours (Rundreisen)".In the same survey Marco Polo Tours in Germany considered Australia's potential as a destination to be "completely underdeveloped".

[7] Fremdenverkehrswirtschaft International,Destination Report Asien & Pazifik Nr. 3, February 1988.pp 4 - 5

Other comments that tour operators made in this particular survey included:

* Cleanliness and price structure of destination is important
* a future for destinations which are easily accessible and which have "relaxation potential" (Erholungswert)

10.2 Results and analysis of the survey

A mail survey of 72 German,Austrian,and Swiss tour operators was carried out during August/September 1989. Only operators listed in the ATC's promotional brochure for the German speaking market were included in the survey.
The purpose of the survey was:

- to establish the level of knowledge that German speaking tour operators have of Southern Australia
- to ascertain whether they include the Southern States in their tour programmes
- to determine what they think their clients want to see on a visit to Southern Australia.

The questionnaire was written in German and a cover letter was attached outlining the author's background as well as the purpose of the survey. It was anticipated that by using the native language of the tour operators, a higher response rate could be achieved. This assumption proved correct.

TABLE 14

QUESTIONNAIRE DISTRIBUTION AND RESPONSE RATE

Country	Questionnaires Distributed	Questionnaires Returned	Usable Questionnaires No.	%
Germany	45	22	20	44%
Austria	9	3	3	30%
Switzerland	18	9	8	44%
Total	72	33	31	43%

Given the generally low response rate attributed to mail surveys(Kress 1988;Frechtling 1987) the overall response rate of 43% was more than satisfactory.Further adding to the significance of the response rate is the fact that the majority of medium size to large tour operators responded, attributing the majority of non-responses to smaller,more specialised operators.

In addition to the completed questionnaire, a number of tour operators also attached letters outlining their thoughts on Southern Australia. Their translated remarks will be outlined following the description of the survey results and the full English text is reproduced in Appendix B.

The following questions were asked in the survey:

TABLE 15

Q.1: <u>FOR HOW MANY YEARS HAVE YOU BEEN ORGANISING TOURS TO AUSTRALIA</u> ?

VALUE LABEL	FREQUENCY	PERCENT
Under 1 year	0	0.0
1 to 2 years	4	12.9
3 to 5 years	3	9.7
over 5 years	24	77.4
TOTAL	31	100.0

The analysis of answers to Q.1 indicates the maturity of the Australian market as seen from the German speaking tour wholesalers standpoint of view. 77.4 percent of respondents stated that they had been operating tours to Australia for more than 5 years. This fact lends credibility to the answers provided by these operators .
Given the fact that in 1985 Australia only attracted a combined total of 55,818 Germans,Austrians and Swiss, the maturity and commitment of the German speaking wholesalers are remarkable. The other surprising fact is
that despite Australia's relatively high profile during 1987/1988 (EXPO,the Bicentennial celebrations and Crocodile Dundee for example), only 12.9% of respondents had started to include Australia into their programmes.

TABLE 16

Q.2 a: DO YOUR PROGRAMMES INCLUDE ATTRACTIONS IN SOUTHERN AUSTRALIA?

	YES		NO	
VALUE LABEL	FREQUENCY	PERCENT	FREQUENCY	PERCENT
Victoria	30	96.8	1	3.2
South Australia	26	83.8	5	16.1
Tasmania	16	51.6	15	48.4

Among the Southern States that were incorporated into the programmes of German speaking wholesalers,Victoria was the most included(96.8%),followed by South Australia (83.8%) and Tasmania(51.6%).

TABLE 17

Q.2 b: IF NO IN Q.2 A,DO YOU INTEND TO INCLUDE SOUTHERN AUSTRALIA INTO YOUR PROGRAMS IN THE NEXT FEW YEARS?

VALUE LABEL	FREQUENCY
Yes	1
No	1

TABLE 18

Q.3: WHICH AUSTRALIAN STATE IS MOST REPRESENTED IN YOUR TOUR PROGRAMMES?

VALUE LABEL	FREQUENCY	PERCENT
Queensland	18	36.7
New South Wales	5	10.2
Victoria	4	8.2
Tasmania	2	4.1
South Australia	2	4.1
Western Australia	1	2.0
Northern Territory	16	32.7
A.C.T. (Canberra)	1	2.0
Total	49	100.0

Some respondents gave multiple answers;hence the total is greater than the sample size.

When analysing the results, it becomes very clear of how little importance Southern Australia is to the German speaking tour wholesalers. While the majority had stated in Question 2 that Victoria, Tasmania and South Australia were included in their respective programmes,these states are certainly not seen as the most represented destinations within Australia.

Victoria is only seen by 8.2% of wholesalers as the state that is most represented in their programmes;Tasmania and South Australia fare even worse with each of them only accounting for 4.1%. The "sun destinations" of Queensland and the Northern Territory with a combined total of 69.4% were clearly the most represented destinations in the tour programmes of German speaking wholesalers.

To overcome this preference for destinations outside Southern Australia,a considerable marketing effort by the Southern states will be required.

TABLE 19

Q.4: <u>WHICH AUSTRALIAN AIRPORT DO YOU USE AS THE PRINCIPAL GATEWAY TO THE COUNTRY?</u>

VALUE LABEL	FREQUENCY	PERCENT
Sydney	27	61.4
Melbourne	10	22.7
Adelaide	0	0.0
Brisbane	0	0.0
Perth	5	11.4
Cairns	1	2.3
Darwin	1	2.3
Total	44	100.0

Some respondents gave more than one answer hence the total is greater than the sample size.

The preference for Sydney as a gateway to Australia is a well known fact. According to the IVS 1988 (BTR,1988), 55% of Germans and 54% of Swiss arrived in Sydney (no figures for Austrians were available).
This pattern was reconfirmed by the German speaking tour operators. 61.4% of responses named Sydney as the gateway city to the country.Melbourne recorded 22.7% of responses which again is in line with the 1988 IVS figure of 18% of

German and 19% of Swiss visitors arriving in this city. Adelaide,undoubtedly disadvantaged by the relatively few international air services,missed out as a gateway city altogether.The IVS 1988 recorded 4% of German and 2% of Swiss visitors arriving through Adelaide.Percentages for Austrian arrivals in Melbourne and Adelaide were not available.

TABLE 20

Q.5: WHICH AUSTRALIAN AIRPORT DO YOU MAINLY USE FOR THE RETURN FLIGHT TO EUROPE?

VALUE LABEL	FREQUENCY	PERCENT
Sydney	25	59.5
Melbourne	8	19.0
Adelaide	0	0.0
Brisbane	2	4.8
Perth	0	0.0
Cairns	4	9.5
Darwin	2	4.8
Townsville	1	2.4
Total	42	100.0

Some respondents gave multiple responses hence the total adds up to more than the sample size.

The ranking of airports used for departure from Australia is the same as for airports used as gateways to the country.Sydney (59.5%) is far ahead of Melbourne (19.0%) while Adelaide recorded no mention.Again, these responses are broadly in line with IVS figures which state that in 1988 54% of Germans and 61% of Swiss visitors departed Australia through Sydney (BTR 1988).No figures for Austrian visitors were available but it can be hypothesised that since LAUDA AIR has started operations between Vienna and Sydney, the city would rate very highly for Austrian departures and arrivals.

TABLE 21

Q.6: WHAT DO YOU THINK YOUR CLIENTS EXPECT FROM AN AUSTRALIAN HOLIDAY?

VALUE LABEL	FREQUENCY	PERCENT	RANK
Adventure	19	16.8	3
"Freedom"	20	17.7	2
Deserted beaches	3	2.7	8
Sunshine/Warmth	15	13.3	4
Unusual animals	14	12.4	5
"Outback"/Nature	28	24.8	1
Friendly people	4	3.5	7
Impressive cities	6	5.3	6
Culture/History	3	2.7	9
Business/Investment	1	.8	10
Total	113	100	

"Outback"/Nature,"Freedom",Adventure ,Sunshine/Warmth and unusual animals are clearly seen as the most important expectations for visitors to Australia, and as the answers to Question 7 also show, to Southern Australia.In the minds and opinions of German,Austrian and Swiss tour operators there is obviously no difference between what they think their clients expect from an Australian holiday and what they expect from a holiday in Southern Australia.

The lesson for Southern Australia therefore is that in order to be successful in the German speaking market they will have to provide and market the products demanded by the German speaking customers and will therefore have to put more emphasis on the natural beauty of the three states.The fact that there is plenty of "outback" in various shapes and forms available and also the fact that the climate, despite what clients may perceive ,is at times better than in the more popular states.

Other perceived client expectations mentioned included:

* Australia the " unknown continent".
* Nature,animals(Kangaroo Island), agriculture (Grampians),
* Farmstays.
* Visitors shy away from the large cities since there are plenty of those where they come from.
* Wine growing regions of interest
* Tasmania very unknown in Germany.

TABLE 22

Q.7: WHAT DO YOU THINK YOUR CLIENTS EXPECT FROM A HOLIDAY IN SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
The same as from an Australian holiday	26	83.9
Culture(Music/Art galleries)	1	3.2
No answer	4	12.9
Total	31	100.0

It becomes clear that tour operators do not believe that their clients would expect anything different from the Southern states than from a holiday in Australia in general. 83.9% stated that they thought their clients would expect the same from a holiday in Southern Australia as they did from an Australian holiday. "Culture" was obviously not perceived to be of any great interest to the clients of German speaking tour operators and it follows that it should not feature prominently in the marketing of the Southern states to the German speaking market.

TABLE 23

Q.8: DO YOU BELIEVE THAT YOUR CLIENTS ARE WELL INFORMED ABOUT SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
Yes	10	32.3
No	17	54.8
Don't know	2	6.5
No answer	1	3.2
Partially	1	3.2
Total	31	100.0

54.8% of respondents stated that they felt that their clients were not well informed about the Southern States. 32.3% thought that their clients were well informed. If the opinions of the tour operators are any indication a greater effort will have to be made to educate and inform the potential visitors to Australia about the attractions of the Southern states.

TABLE 24

Q.9.: DO YOU THINK YOU ARE WELL INFORMED ABOUT THE AVAILABLE TOURIST ATTRACTIONS IN SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
Yes	22	70.1
No	7	22.6
Don't know	1	3.2
No answer	1	3.2
Total	31	100.0

In contrast to the perceived lack of information that their clients had about the Southern states, the tour operators themselves stated that they were well informed about the available attractions (70.1%) in Southern Australia.

Q.10: IF NO IN QUESTION 9 WHAT KIND OF INFORMATION ON SOUTHERN AUSTRALIA WOULD YOU REQUIRE?

The following comments were received.

One Austrian tour operator indicated that:

* more information regarding special events and performances of all kind would be useful.

A Swiss operator stated that:

* it is generally very difficult to obtain information on Southern Australia and that he was particularly interested in information regarding the national parks. Information in German would also be appreciated.

Other comments regarding the information needs ranged from:

* basically all information to more detailed information on the tourism infrastructure and tourist attractions.

TABLE 25

Q.11: IN YOUR OPINION WHAT ARE THE MOST ASKED FOR ACTIVITIES YOUR CLIENTS WOULD LIKE TO DO DURING THEIR AUSTRALIAN HOLIDAY?

VALUE LABEL	FREQUENCY	PERCENT	RANK
Do nothing	2	2.6	5
Hiking	5	6.4	4
Sightseeing	23	29.5	2
Explore the country	28	35.9	1
Swim in the ocean	16	20.5	3
Shopping	2	2.6	5
Visit cultural events	1	1.3	7
Practise sport	1	1.3	7
Total	78	100.0	

Multiple responses were possible,hence the total is higher than the sample size.

The answers to Question 11 further clarify the needs of the German speaking market. The activity mentioned most is "to explore the country"(35.9%) followed by "sight-seeing"(29.5%) and "swim in the ocean" (20.5%).

Given the popularity of hiking in the three German speaking countries the low priority (6.4%) that the tour operators allocated to hiking came as somewhat of a surprise.One possible explanation could be that the excellent bushwalking and hiking opportunities which exist in Australia are not well enough known to both the tour operators and the consumers.

Shopping,while it may have a high priority with other overseas visitors such as the Japanese, is in the opinions of the surveyed German speaking tour operators, of very little significance to their clients. Only 2.6% of responses named it as an activity their clients would want to engage in while on an Australian holiday.It follows that shopping as an attraction should not be promoted to the German speaking market.

The insignificance of shopping was only equalled by "doing nothing" (2.6%) and was surpassed only by "visiting cultural events" (1.3%) and "practising sport" (also 1.3%).

Other activities mentioned in Question 11 included:

* Motorcycling
* Business Contacts
* Tours in the camper van or Four Wheel Drive
* Experiencing the"Outback"
* Study tours [Studienreisen]
* Nature observation
* Fly-drive & sleep tours
* Camping
* Snorkelling/diving
* Sailing
* Aboriginal culture

Most of these activities could be classified under the heading of "special interest tourism" and almost all of them are readily available in Southern Australia.

TABLE 26

Q.12: DO YOU THINK THAT THE CULTURE AND LIFESTYLE OF THE AUSTRALIAN ABORIGINALS HAS A SPECIAL ATTRACTIVENESS FOR GERMAN SPEAKING VISITORS?

VALUE LABEL	FREQUENCY	PERCENT
Yes	20	64.5
No	10	32.3
No answer	1	3.2
Total	31	100.0

64.5% of tour operators thought that the culture and life style of the Aboriginals were of special interest to the German speaking visitors.This is in contrast to the insignificance of the European culture as an attraction for the German speaking visitors.This positive response to Aboriginal culture should further encourage the Victorian Tourist Commission to continue on its path of the development of Aboriginal culture as a possible additional attraction for visitors to Victoria.

The establishment of the Koorie unit within the Victorian Tourism Commission was a first step towards achieving this goal.

TABLE 27

Q.13: MANY GERMAN SPEAKING VISITORS ARRIVE IN MELBOURNE BUT FLY STRAIGHT ON TO SYDNEY WITHOUT HAVING VISITED SOUTHERN AUSTRALIA. DO YOU THINK THAT THE POSSIBLE INTRODUCTION OF A VERY FAST TRAIN (VFT) WHICH COULD TRANSPORT VISITORS IN THREE HOURS BETWEEN MELBOURNE AND SYDNEY WILL HAVE AN IMPACT ON THE TRAVEL PATTERN OF GERMAN SPEAKING VISITORS?

VALUE LABEL	FREQUENCY	PERCENT
Yes	8	25.8
No	19	61.4
Don't know	1	3.2
Don't think so	1	3.2
Maybe	1	3.2
No response	1	3.2
Total	31	100.0

Further comments received included:

* No, since transport is no problem in the Southern States and transport [within the region] does not have any great implications on the number of visitors.

* No,because trains are booked as attractions (Ghan,Indian Pacific) rather than as modes of transport.The plane is number one as far as fast transport is concerned.
* Yes,a three hour trip between Melbourne and Sydney seems advantageous.

61.4 % of respondents stated that the introduction of the VFT will not alter the travel patterns of their clients. 25.8% believed that the VFT would alter the travel patterns of there clients.The high negative response rate to the VFT proposal might come as somewhat of a surprise to the developers of the project given the fact that German speaking visitors are in general very well accustomed to fast and efficient train services in their respective countries. In summary, it becomes clear that at least in the mind of German speaking tour operators, Victoria will not see an increase in German visitors after the introduction of the Very Fast Train.

TABLE 28

Q.14: HOW MANY TRIPS TO AUSTRALIA DO YOU SELL IN A YEAR?

VALUE LABEL	FREQUENCY	PERCENT
1 - 50	6	20.0
51 -100	2	6.7
101-150	2	6.7
151-200	1	3.3
201-250	0	0.0
251-300	2	6.7
301-350	2	6.7
351-400	1	3.3
over 400	13	43.3
No response	1	3.3
Total	30	100.0

In addition one tour operator stated that he sold between 1-50 group tours to Australia per year. Since the exact number of group participants could not be determined, this response was not included into the above table. 43.3% of respondents sold more than 400 trips to Australia per year, indicating that a large number of respondents can be classified as significant players in the German speaking Australia market.

Additional comments by tour operators:

In addition to the above responses to the questionnaire, a number of tour operators provided further information in the form of letters attached.Following is a summary of some of their comments which were translated from German. For the translated full text of the letters see Appendix B.

CLIMATE

* The climate in the Southern States is worse than in the other States
* Climatic conditions in Southern Australia should be positively highlighted to consumers and travel agents/tour operators alike
* Visitors seek sun,sea and adventure which is more likely to be found in Northern Australia

ATTRACTIONS AND SCENERY

* Southern Australia is perceived as unattractive for "nature lovers"
* Compared to the Northern Territory and Queensland the scenery in the Southern states is less attractive
* Limited time available allows visitors only to concentrate on the well known attractions - Southern Australia lacks these well known attractions

* Prestige - visits to attractions which are not known to family and friends back home carry little prestige and hence don't have a high priority for the visitors
* The Southern States are too European
* Melbourne is too puritan and Victorian
* Melbourne does not have the attractiveness of Sydney

PRODUCT

* Lack of good quality two to four day package for places like for example Kangaroo Island
* The development of modules for areas such as Dandenongs,Phillip Island and Kangaroo Island would make it easier to sell the South.

OTHER

* Poor promotion of the region
* More information on the Southern states is required
* German tourists have little idea about the different states in Australia
* Australian Tourism Exchange should be held in Melbourne [will happen in 1991 and 1992] and Adelaide to give exposure to the region

* Familiarisation trips for wholesalers to the Southern States would be appreciated
* Most clients don't just visit one state,hence the opportunity exists to attract them to the Southern states
* Domestic airfares are too high

The above comments highlight some of the obstacles to an increased number of German speaking visitors to Southern Australia. Comments should be considered one by one by the relevant authorities and by industry in order to improve the marketing efforts in the German speaking countries.

10.3 Opinion of a Sydney-based German inbound tour operator

A telephone interview with the manager of a large inbound operator in Sydney was conducted to investigate what perceived problems existed regarding the attractiveness of Southern Australia for German visitors.Comments received basically confirmed what a number of German speaking tour operators had stated in the survey.

* Southern Australia has to market its natural attractions rather than its so called culture if it wants to attract more German visitors.

* Attractions like Sovereign Hill and the Penguins are not highly regarded by this particular inbound operator and he does not include them in his programmes.

* Hotels are fine but the experience of sitting under the stars and having a bush barbecue together with a camp fire and some guitar playing strike a much better cord. with the German market.

* Time is a factor with most tours lasting 16-25 days and so many things to see. Some attractions are just a must like one city namely Sydney,the Reef, the Outback etc.
* Kangaroo Island is also highly regarded.This is interesting since this has been mentioned a number of times by the German speaking tour operators.

* The Ghan to Alice Springs is popular.

* Airfares are still a concern and he thinks that if packages of around DM 5, 000 can be offered, Australia would be very marketable. Anything higher is getting too expensive. Considering that the airfare component would easily account for between DM 2,200 and Dm 3,000 the ground content will have to be packaged with care in order not to exceed the suggested ceiling of DM 5,000.

* Representation of the Southern States in Germany is not good . The various Australian tourism offices [represented in London] seem to have difficulties in being able to distinguish between the needs of the various European countries.The inbound operator voiced the concern that it appeared that all European markets are dealt with in much the same way which does not reflect their great diversity.

A recommendation from this particular inbound operator was as follows:

> segment the market and give the German speaking markets what they want most out of Australia namely: a nature related experience that cannot be repeated anywhere else in the world. If this simple philosophy is followed,people will want to visit.

Note: After 7 years in Australia this particular inbound tour operator has never heard of Wilsons Promontory hence, had never considered its inclusion into any tour programmes.

It follows from this observation that the education of inbound operators as to the attractions of the Southern States should carry a high priority with private and government organisations alike .Without a detailed knowledge of a destination,its packaging and promotion cannot be carried out successfully.

SECTION 6

11.0 THE PERCEPTIONS AND HOLIDAY EXPECTATIONS OF GERMAN SPEAKING VISITORS TO SOUTHERN AUSTRALIA

11.1 Background to the survey

The survey was conducted in order to establish what knowledge German speaking visitors have of Southern Australia and to determine what expectations they have of a holiday in the Southern States.In addition the survey was also intended to enable the author to compare some of the answers given by tour operators with those of the actual visitors.

As stated under the heading of 'Methodology', the collection of data was extremely difficult.Permission to have inbound questionnaires distributed on flights to Australia could not be obtained and despite the efforts of QANTAS who twice distributed questionnaires to departing passengers in Frankfurt airport no responses were received. Responses that were received are the result of the questionnaire distributions to inbound passengers at Melbourne airport during December 1989. The sample size is 21 .

11.2 Results and analysis of the survey

The following 25 questions were asked:

TABLE 29

Q.1 <u>IS THIS YOUR FIRST VISIT TO AUSTRALIA?</u>

VALUE LABEL	FREQUENCY	PERCENT
Yes	13	61.9
No	7	33.3
No answer	1	4.8
Total	21	100.0

TABLE 30

Q.2. <u>IF NO IN Q.1,HOW MANY TIMES HAVE YOU BEEN TO AUSTRALIA BEFORE?</u>

VALUE LABEL	FREQUENCY	PERCENT
Once	5	23.8
Twice	2	9.5
Fist visit	13	61.9
No answer	1	4.8
Total	21	100.0

61.9% of respondents stated that this was their first trip to Australia whereas a somewhat surprisingly high 33.3% of respondents had been to Australia before.As the answers to Q.2 show 23.8% of respondents who had been to Australia before had been here once and 9.5% had been to the country twice before.

TABLE 31

Q.3 HOW LONG (IN DAYS) ARE YOU PLANNING TO STAY IN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
5	1	4.8
16	1	4.8
20	2	9.5
22	1	4.8
30	5	23.8
35	2	9.5
45	2	9.5
48	1	4.8
50	1	4.8
60	1	4.8
150	1	4.8
180	1	4.8
365	1	4.8
No answer	1	4.8
Total	21	100.0

The planned mean length of stay was 62 days.Given that there were three responses with planned lengths of stay of more than 150 days, the mean may not be an appropriate measure. The median length of stay of 32.5 days is therefore a better indicator.This figure is in line with the average length of an Australian visit as suggested by some German speaking tour operators.The Bureau of Tourism Research figure for the German market is 42 days.

TABLE 32

Q.4 HOW MANY DAYS DO YOU INTEND TO SPEND IN SOUTHERN AUSTRALIA (VICTORIA,TASMANIA,SOUTH AUSTRALIA)?

(IF NONE CONTINUE AT Q.8)

VALUE LABEL DAYS	FREQUENCY	PERCENT
2	2	9.5
4	2	9.5
5	1	4.8
6	1	4.8
10	1	4.8
11	1	4.8
14	2	9.5
17	1	4.8
21	2	9.5
25	1	4.8
30	2	9.5
35	1	4.8
40	1	4.8
150	1	4.8
365	1	4.8
No answer	1	4.8
TOTAL	21	100.0

Out of the 20 respondents who indicated any length of stay in the Southern States 10 or 50% intended to stay 14 days or less, and an equal number indicated that they were planning to stay more than 14 days.

TABLE 33

Q.5 <u>IN WHICH OF THE SOUTHERN STATES DO YOU PLAN ON SPENDING THE MOST TIME</u>

VALUE LABEL	FREQUENCY	PERCENT
Victoria	12	57.1
Tasmania	1	4.8
South Australia	1	4.8
Undecided	2	9.5
No answer	5	23.8
Total	1	100.0

With 57.1%, Victoria was by far the most popular state with Tasmania and South Australia only rating one response each.A certain bias towards Victoria may have resulted from the fact that the questionnaires were actually handed out in Melbourne airport.

Question six (in conjunction with question 7) can be considered to be the most significant of the inbound survey since it establishes what the German speaking visitors expect out of a holiday in the Southern States.

TABLE 34

Q.6 <u>WHAT DO YOU EXPECT FROM THE SOUTHERN STATES?</u>

MULTIPLE RESPONSES POSSIBLE.

VALUE LABEL	FREQUENCY	% OF RESPONSES	% OF CASES	RANK
Sun/Warmth	17	25.8	94.4	1
Deserted beaches	3	4.5	16.7	5
Interesting landscapes	16	24.2	88.9	2
Unique wildlife	15	22.7	83.3	3
Cosmopolitan cities	3	4.5	16.7	5
Cultural events	4	6.1	22.2	4
Uninhabited areas	3	4.5	16.7	5
Sporting facilities	1	1.5	5.6	10
Important sports events	2	3.0	11.1	8
"Outback"	2	3.0	11.1	8
Total	66	100.0	366.7	

Note: 3 missing cases

Other activities mentioned:

Hiking tracks and hospitable people were the only two responses in the 'other' category.

Sun/Warmth ,interesting landscape and unique wildlife were by far the most frequently named expectations of German speaking visitors.These three expectations accounted for 72.7% of all responses.There is little doubt that the Southern States can live up to visitors expectations regarding landscape and wildlife but some concern regarding sun/warmth must be expressed. During the summer months visitor expectations regarding warmth would certainly be fulfilled, but during the rest of the year some potential disappointments may be unavoidable. In order to counteract the possibility of a negative holiday experience caused by the lack of warmth and sunshine,it is important to assure that potential visitors to Southern Australia are clearly informed on the range of temperatures and the hours of sunshine they can expect during each month of the year.

The lower winter temperatures do not necessarily have to be a disadvantage for the promotion of the region since opportunities such as skiing and visits to the outback region of South Australia, arise during the cooler months of the year.

TABLE 35

Q.7 WHAT ARE YOUR MAIN INTERESTS DURING YOUR STAY IN SOUTHERN AUSTRALIA?(MULTIPLE RESPONSES POSSIBLE)

VALUE LABEL	FREQUENCY	PCT OF RESPONSES	PCT OF CASES	RANK
Do nothing	4	6.2	25.0	6
Visit nature-parks	14	21.5	87.5	1
Sightseeing	9	13.8	56.3	4
Explore the country	11	16.9	68.8	2
Swim in the ocean	7	10.8	43.8	5
Shopping	1	1.5	6.3	10
Fine dining	2	3.1	12.5	8
Photography	11	16.9	68.8	2
Attend cultural events	2	3.1	12.5	8
Museums/Art Exhibitions	3	4.6	18.8	7
Practice sport	1	1.5	6.3	10
Total responses	65	100.0	406.3	

Note: 5 missing cases

Visiting nature/national parks (21.5%),exploring the country (16.9%), photography (16.9%) and sight-seeing were the four main interests mentioned.Together they accounted for 72.2% of all responses.Shopping,practicing sport,fine dining ,attending cultural events and visiting museums/art exhibitions combined accounted for only 13.8% of responses.This clearly shows the low priority that German speaking visitors place on those activities yet,somewhat ironically,places like Melbourne seem to highlight these very features in their marketing campaigns.

A comparison with the responses from the survey of German speaking tour operators (Table 36) revealed a surprising similarity between their assessment of what clients want and what actual visitors stated.

TABLE 36

RANKING OF EXPECTED HOLIDAY ACTIVITIES BY TOUR OPERATORS AND VISITORS

ACTIVITY	TOUR OPERATORS %	RANK	VISITORS %	RANK
Explore the country	35.9	1	16.9	1
Sightseeing	29.5	2	13.8	2
Swim in the ocean	20.5	3	10.8	3
Shopping	2.6	5	1.5	5
Practise sport	1.3	7	1.5	7
Cultural events	1.3	7	3.1	7

Note that visiting nature parks/national parks,fine dining,photography and museums/art exhibitions were not included in the tour operators questionnaire.The identical ranking of the above activities by operators and visitors does show the excellent understanding that German speaking tour operators have of the market.It follows that in order to promote Southern Australia, the opinions of those operators should be taken into consideration before marketing plans are developed and that recommendations made by German speaking tour operators should be acted upon .

Q.8 <u>PLEASE ANSWER THIS QUESTION ONLY IF YOU HAVE ANSWERED Q.4 WITH 'NONE'.</u>

TABLE 37

Q.8 A. <u>WHAT IS THE MAIN REASON WHY YOU WILL NOT VISIT SOUTHERN AUSTRALIA (VICTORIA,TASMANIA,SOUTH AUSTRALIA)</u>?

VALUE LABEL	FREQUENCY
Not enough information	2
Too European	1
Total	3

The vast majority of respondents did intend to visit Southern Australia.This question was originally included when it was assumed that the questionnaire would be distributed in flight.Since this did not eventuate and all responses received were the result of visitors being handed the questionnaire at Melbourne airport upon arrival,the small number of visitors who did not intend to visit Southern Australia does not come as a surprise.

TABLE 38

Q.8 B. <u>WOULD YOU CONSIDER A VISIT TO SOUTHERN AUSTRALIA IF A TRAIN WOULD EXIST THAT COULD TAKE YOU FROM SYDNEY TO MELBOURNE IN THREE HOURS?</u>

VALUE LABEL	FREQUENCY	PERCENT
Yes	2	9.5
No	0	0.0
No answer	19	90.5
Total	21	100.0

Two respondents stated that they would consider a visit to Southern Australia if a Very Fast Train existed.

19 visitors did not give an answer since they were visiting Southern Australia and hence the question did not apply to them.

TABLE 39

Q.9 WHICH OF THE FOLLOWING ATTRACTIONS IN SOUTHERN AUSTRALIA HAVE YOU HEARD OF (ARE YOU FAMILIAR WITH)?

VALUE LABEL	FRE-QUENCY	PCT OF RESP.	PCT OF CASES	RANK
Barossa Valley	6	15.0	42.9	3
Phillip Island	6	15.0	42.9	3
Flinders Ranges	3	7.5	21.4	6
Franklin/Gordon River	1	2.5	7.1	9
Gt.Ocean Rd./12 Apostles	8	20.0	57.1	1
Cradle Mountain	2	5.0	14.3	7
Sovereign Hill	2	5.0	14.3	7
Cape Schanck Coastal Park	1	2.5	7.1	9
Hahndorf	4	10.0	28.6	5
Wilsons Promontory	7	17.5	50.0	2
Total Responses	40	100.0	285.7	

Note: 7 missing cases

The fact that 7 respondents did not answer the question can be interpreted as to indicate the unfamiliarity of the visitors with any attractions in the Southern States.

Among those visitors who did provide an answer to the question,the most recognised tourist attraction with a response rate of 20% was, The Great Ocean Rd./12 Apostles, followed somewhat surprisingly by Wilson's Promontory with 17.5%. Phillip Island and the Barossa Valley ranked equal third with 15% of responses respectively.The least recognised attractions were the Franklin/Gordon river and Cape Schanck Coastal Park which were recognised as tourist attractions by only 2.5% of respondents.

Other attractions that were known to some visitors included: The Grampians,Coober Pedy and Melbourne.
The following attractions were mentioned by visitors who had been to Australia once or twice before: Victoria Market,Dandenongs Lakes Entrance,Werribee,Healesville and the Buchan Caves .

The answers to this question reveal the much greater awareness of repeat visitors of existing tourist attractions in Southern Australia. The challenge for the marketing bodies in Southern Australia is to raise the information level of first time visitors to such a level that they too become aware of the many and varied attraction that Southern Australia has to offer.This increased awareness would assist in increasing the length of stay of these visitors in the Southern States.

TABLE 40

Q.10 <u>WHAT DO YOU THINK ARE THE MAIN ATTRACTIONS OF MELBOURNE FOR GERMAN SPEAKING VISITORS?</u>

VALUE LABEL	FREQUENCY	PCT OF RESP.	PCT OF CASES
Botanical Garden/ City Parks	11	28.9	55.0
Beaches and the ocean	12	31.6	66.7
Fine restaurants	2	5.3	11.1
Multicultural population	2	5.3	11.1
Melbourne's sporting events	3	7.9	16.6
Art and culture events	3	7.9	16.6
Victorian architecture	4	10.5	22.2
Don't know	1	2.6	5.6
Total	38	100.0	204.9

Three missing cases.Valid cases 18.

Melbourne's beaches and the ocean as well as the botanical garden/city parks were seen as the main attractions of the city.This further supports the author's opinion that it is the natural attractions that German speaking visitors are predominantly interested in and therefore,the promotion of Melbourne and Victoria along the lines of culture,fine dining and sport is not appropriate for the German speaking market .

TABLE 41

Q.11 DID YOU RECEIVE ENOUGH INFORMATION ON SOUTHERN AUSTRALIA PRIOR TO YOUR DEPARTURE?

VALUE LABEL	FREQUENCY	PERCENT
Yes	12	57.1
No	7	33.3
No answer	2	9.5
Total	21	100.0

TABLE 42

Q.12 IF YES IN Q.11,WHERE DID YOU GET THIS INFORMATION FROM?(MULTIPLE RESPONSES POSSIBLE)

VALUE LABEL	FREQUENCY	PCT OF RESPONSES	PCT OF CASES
Travel Agent	10	71.4	90.9
ATC	4	28.6	36.4
Total	14	100.0	127.3

Missing cases:7

Note:The Victorian,Tasmanian and South Australian State Tourism offices were also given as possible responses.None of them were however used as sources of information.

In answers to Question 11, 57.1% of visitors stated that they had received sufficient information on Southern Australia prior to their departure.While this figure can be interpreted as satisfactory, it should not be over - looked that 1/3 of respondents stated that they had not received sufficient information on the region.

The predominant use of travel agents evident from answers to Q.12 , as a source of information on Southern Australia, is in line with the findings of the Reiseanalyse 1988 which states that 35.4% of German travellers used a travel agent as an information source. The heavy use of travel agents as a source of information has implications on the marketing of the Southern States.Recognising the importance of the travel agents in the German speaking countries, it follows that for successful promotion of Southern Australia to take place, sufficient information material on these states will have to be made available to the German speaking travel agents.Agents cannot sell what they don't have sufficient information about.

Other sources of information mentioned included : travel guide books,other travel literature and relatives.
German long-haul travellers usually attempt to inform themselves thoroughly about the destination prior to departure.Travel guide books are often seen as neutral in their description of a destination and are therefore trusted more than the glossy brochure of a tour operator or the promotional material of the destination's Tourism Office. It follows that in order to be more successful in attracting German speaking visitors to the region the contents of existing German guide books on Australia should be examined to determine their Southern Australian content
.

TABLE 43

Q.13 WHICH MODE OF TRANSPORT DO YOU INTEND TO USE FOR THE LONGEST DISTANCES DURING YOUR STAY IN SOUTHERN AUSTRALIA? (Multiple responses possible)

VALUE LABEL	FREQUENCY	PERCENT OF RESPONSES	PERCENT OF CASES
Hire car	7	30.4	43.8
Campervan	2	8.7	12.5
Coach	7	30.4	43.8
Train	1	4.3	6.3
Plane	6	26.1	37.5
Total	23	100.0	143.8

5 missing cases

Hire cars and coaches were the two modes of transport which respondents planned to use most during their stay in Southern Australia.Both modes of transport were however only slightly ahead of the plane .The average number of modes of intended transport was 1.43 suggesting that probably a combination of plane and hire car or plane and coach as the most preferred combination of transport.

Q.14 WHICH OTHER FORMS OF TRANSPORT DO YOU PLAN ON USING DURING YOUR STAY IN SOUTHERN AUSTRALIA?

This question was included to identify forms of transport that visitors might use for shorter trips within Southern Australia. Responses included [Number of responses in ():Ship/ferry (1),Bus (1), Train (4),and the cars of friends and relatives(3)

TABLE 44

Q.15 WHICH FORM OF ACCOMMODATION DO YOU INTEND TO PRINCIPALLY USE DURING YOUR STAY IN SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PCT OF RESPONSES	PCT OF CASES
Accommodation of friends and relatives	10	24.4	50.0
Up-market hotels (4-5 star)	1	2.4	5.0
Mid range hotels (2-3 star)	1	2.4	5.0
Budget hotels	0	0.0	0.0
Backpackers hostels	5	12.2	25.0
Youth hostels	6	14.6	30.0
Motels	7	17.1	35.0
Apartments	2	4.9	10.0
Caravanparks/campgrounds	7	17.1	35.0
Sleep outside	2	4.9	10.0
Total	41	100.0	205.0

1 Missing case

The most popular form of accommodation with 24.4% of responses was the accommodation of friends and relatives followed by motel accommodation and caravan park/campgrounds both 17.1% ,Youth Hostels (14.6%) and backpacker hostels with 12.2%. This indicates the "down-market" accommodation preference of the surveyed German speaking visitors.It is also of interest to note that the same number of responses were received in the category of 'sleeping outside'as in the two categories of 2-3 star and 4-5 star hotels.

TABLE 45

Q.16 WHICH PART OF YOUR VISIT TO AUSTRALIA DID YOU BOOK AND PREPAY PRIOR TO DEPARTURE?

VALUE LABEL	FREQUENCY	PERCENT
The total stay in Australia	5	23.8
Only the flight	15	71.4
The flight and campervan	1	4.8
Total	21	100.0

The fact that 71.4% of respondents had only booked and prepaid for their flight to Australia indicates the independent nature of German speaking travellers to the country.It also opens up the opportunity for the Southern States to influence the travel pattern of German speaking visitors even after they have arrived in Australia.

TABLE 46

Q.17 WITH HOW MANY PEOPLE ARE YOU TRAVELLING?

VALUE LABEL	FREQUENCY	PERCENT
Alone	3	14.3
With partner	17	81.0
With partner and children	0	0.0
In a group	1	4.8
Total	21	100.0

The vast majority (81%) of respondents, stated that they were travelling with a partner whilst 14.3% travelled alone. Only one respondent stated that he/she was travelling as part of a group.

TABLE 47

Q.18 FROM WHICH AUSTRALIAN AIRPORT WILL YOU START YOUR RETURN FLIGHT TO EUROPE?

VALUE LABEL	FREQUENCY	PERCENT
Melbourne	9	42.9
Sydney	9	42.9
Cairns	1	4.8
Darwin	2	9.5
Total	21	100.0

The equal percentage of Melbourne and Sydney as the departure airport did come as a surprise since it is generally accepted that Sydney is by far the more popular airport both for arrivals and departures.Although the sample is small, it is also of interest to note that 9.5 % of respondents intended to leave Australia from Darwin.Darwin as a gateway and/or departure airport had also been mentioned a number of times by Swiss tour operators.From a visitor's standpoint, it makes perfect sense to fly into the Southern States and depart from the Northern Territory or visa versa instead of overflying the whole continent and spending extra time and money just to travel back and forth between Southern Australia and say Kakadu National Park .

TABLE 48

Q.19 WHAT IS YOUR GENDER?

VALUE LABEL	FREQUENCY	PERCENT
Male	15	71.4
Female	6	28.6
Total	21	100.0

Male respondents accounted for 71.4% and female respondents for 28.6% of the sample.

TABLE 49

Q.20 WHICH OTHER COUNTRIES IN THE SOUTH PACIFIC REGION ARE YOU PLANNING ON VISITING AS PART OF THIS TRIP?

VALUE LABEL	FREQUENCY	PCT OF RESPONSES	PCT OF CASES
None	8	47.1	53.3
New Zealand	7	41.2	46.7
Tahiti	2	11.8	13.3
Total	17	100.0	113.3

6 missing cases

47.1% of respondents stated that they did not intend to visit any other countries in the South Pacific.(Note that this question did not include planned visits to Asian countries).Among the other countries in the South Pacific which German speaking visitors planned to visit, New Zealand was clearly the favourite. 41.2% of respondents stated that they were also planning on visiting New Zealand as part of their holidays in the South Pacific.While the sample is small it could nevertheless be seen as an indicator that joint marketing programmes between Australia and New Zealand in the German speaking market may be of value.

TABLE 50

Q.21 ON WHICH CONTINENTS HAVE YOU SPENT A HOLIDAY PRIOR TO THIS VISIT TO AUSTRALIA?

VALUE LABEL	FREQUENCY	PCT OF RESPONSES	PCT OF CASES
Australia	2	22.2	33.3
Antarctica	0	0.0	0.0
Africa	3	33.3	50.0
Asia	2	22.2	33.3
North America	1	11.1	16.7
South America	1	11.1	16.7
Total	9	100.0	150.0

There were 15 missing cases.This fact allows two interpretations.The first is that respondents were simply unwilling to provide information on this question.Given the prestige attached to long-haul travel (no reason not to admit that one has visited another continent) and the impersonal nature of this question this interpretation may be most unlikely.The second,and somewhat more likely interpretation is that the majority of respondents had not spent a holiday on any other continent.This would indeed be surprising because it is often thought that Australia is not the first long-haul destination for German speaking travellers, since most other continents are by far closer to the German speaking countries.

TABLE 51

Q.22 HOW MANY AUSTRALIAN DOLLARS DO YOU THINK YOU WILL SPEND PER DAY DURING YOUR VISIT TO SOUTHERN AUSTRALIA(INCLUDING ACCOMMODATION,FOOD,TRANSPORT AND SMALLER EXTRAS)?

VALUE LABEL	FREQUENCY	PERCENT
$ 30 - $ 50	3	14.3
$ 51 - $100	7	33.3
$101 - $150	5	23.8
$151 - $200	2	9.5
$201 - $250	1	4.8
$251 - $300	0	0.0
$301 - $350	0	0.0
over $350	0	0.0
No response	3	14.3
Total	21	100.0

A combined 71.4% of respondents indicated that they planned to spend less than $ 150.00 per day during their stay in Southern Australia.

Read in conjunction with the fact that 85.4% of respondents indicated that they would use mainly "budget" accommodation.This indicates the "down market" nature of this sample of German speaking visitors.It is however necessary to qualify this observation, by also taking the fairly long duration of stay in Australia into account.

TABLE 52

Q.23 HOW MANY INHABITANTS DOES YOUR PLACE OF RESIDENCE HAVE?

VALUE LABEL	FREQUENCY	PERCENT
Under 10,000	5	23.8
10,000 - 50,000	5	23.8
51,000 - 100,000	1	4.8
101,000 - 200,000	1	4.8
201,000 - 500,000	1	4.8
501,000 - 1,000,000	3	14.3
Over one million	4	19.0
No response	1	4.8
Total	21	100.0

Somewhat surprising was the high proportion of visitors from small communities since these are often associated with more rural ideals (less adventurous) and also with a somewhat lower level of income and sophistication.
23.8% of respondents stated that their place of residence had under 10,000 residents and an equal 23.8% stated that they came from a town with less than 50,000 inhabitants.
Given the many large cities in Germany,Austria and Switzerland the 33.3% of respondents who originated in cities with a population of above 500,000 did not come as a surprise.

TABLE 53

Q.24 IN WHICH STATE IS YOUR PLACE OF RESIDENCE? (BUNDESLAND FOR GERMANY AND AUSTRIA)

STATE	FREQUENCY	PERCENT
Germany:		
Bayern	1	4.8
Baden Wuerttemberg	4	19.0
Hessen	4	19.0
Nordrhein-Westfalen	3	14.3
Schleswig- Holstein	1	4.8
Hamburg	2	9.5
Berlin	2	9.5
Rheinland Pfalz	1	4.8
Saarland	0	0.0
Austria:		
Salzburg	1	4.8
No response	2	9.5
Total	21	100.0

No Swiss visitors were among the surveyed.

No clear pattern regarding the state of origin of the visitors emerged.In broad terms an almost equal number of visitors originated in the Southern and Northern States of Germany.

TABLE 54

Q.25 TO WHICH AGE GROUP DO YOU BELONG?

VALUE LABEL	FREQUENCY	PERCENT
18 - 25	2	9.5
26 - 35	5	23.8
36 - 45	1	4.8
46 - 55	3	15.8
56 - 65	6	28.6
Over 65	2	9.5
No response	2	9.5
Total	21	100.0

While the age group of under 45 made up 38.1% of the sample ,the over 45's constituted 53.9% of respondents.Within the over 45 age group the 28.6% of visitors who fell into the 56-65 age group made up the largest percentage of the sample.

SECTION 7

12.0 THE HOLIDAY EXPERIENCES OF GERMAN SPEAKING VISITORS TO SOUTHERN AUSTRALIA

12.1 Background to the survey

This survey was conducted to establish the travel patterns of some German speaking visitors during their visit to Australia and to identify the extent to which visitors had actually visited attractions in Southern Australia.Most responses were received by interviewing passengers prior to their departure at Melbourne Airport. The sample size is 33.

12.2 Results and analysis of the survey

The following 16 questions were asked.

TABLE 55

Q.1 WAS THIS YOUR FIRST VISIT TO AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
Yes	23	69.7
No	9	27.3
No answer	1	3.0
Total	33	100.0

For the vast majority (69.7%) of visitors surveyed this had been their first visit to Australia.

Q.1B: IF NO IN QUESTION 1a,HOW MANY TIMES HAVE YOU BEEN TO AUSTRALIA BEFORE?

Four visitors who answered "No" in question 1 had been to Australia once before,three visitors had been here twice before ,one visitor had been here three times and one visitor despite having answered "No" in Q.1 did not specify how many times he/she had previously visited Australia.

TABLE 56

Q.2 HOW MANY DAYS DID YOU SPEND IN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
4	1	3.1
5	1	3.1
11	1	3.1
13	1	3.1
14	1	3.1
15	1	3.1
16	2	6.2
20	1	3.1
22	1	3.1
24	1	3.1
27	1	3.1
28	1	3.1
30	3	9.4
32	1	3.1
35	5	15.6
36	1	3.1
37	1	3.1
40	1	3.1
42	1	3.1
45	3	9.4
49	1	3.1
58	1	3.1
156	1	3.1
No answer	1	3.1
Total	33	100.0

Q.3 APPROXIMATELY HOW MANY DAYS DID YOU SPEND IN THE VARIOUS STATES?

TABLE 57

DAYS IN VICTORIA

VALUE LABEL DAYS	FREQUENCY	PERCENT
1	3	9.1
2	4	12.1
3	4	12.1
4	3	9.1
5	1	3.0
7	1	3.0
8	3	9.1
10	3	9.1
14	1	3.0
15	1	3.0
17	1	3.0
20	1	3.0
35	2	6.1
36	1	3.0
37	1	3.0
135	1	3.0
Did not visit	2	6.1
Total	33	100.0

TABLE 58

DAYS IN SOUTH AUSTRALIA:

VALUE LABEL DAYS	FREQUENCY	PERCENT
1	2	6.1
2	2	6.1
4	1	3.0
5	1	3.0
7	2	6.1
8	3	9.1
10	1	3.0
Did not visit	21	63.6
Total	33	100.0

TABLE 59

DAYS IN TASMANIA

VALUE LABEL DAYS	FREQUENCY	PERCENT
6	1	3.0
14	2	6.1
30	1	3.0
Did not visit	29	87.9
Total	33	100.0

TABLE 60

DAYS IN NEW SOUTH WALES

VALUE LABEL DAYS	FREQUENCY	PERCENT
1	2	6.1
2	1	3.0
3	3	9.1
4	1	3.0
5	2	6.1
6	1	3.0
7	2	6.1
8	4	12.1
10	4	12.1
11	2	6.1
12	1	3.0
14	1	3.0
23	1	3.0
Did not visit	8	24.2
Total	33	100.0

TABLE 61

DAYS IN QUEENSLAND

VALUE LABEL DAYS	FREQUENCY	PERCENT
2	1	3.0
3	1	3.0
4	2	6.1
5	2	6.1
7	1	3.0
8	2	6.1
10	2	3.0
12	1	3.0
14	4	12.1
15	1	3.0
22	1	3.0
27	2	6.1
41	1	3.0
Did not visit	12	36.6
Total	33	100.0

WESTERN AUSTRALIA:

None of the respondents had visited Western Australia.

TABLE 62

DAYS IN THE NORTHERN TERRITORY

VALUE LABEL DAYS	FREQUENCY	PERCENT
2	3	9.1
3	5	15.2
4	1	3.0
5	2	3.0
7	1	3.0
20	1	3.0
Did not visit	20	66.7
Total	33	100.0

TABLE 63

DAYS IN THE AUSTRALIAN CAPITAL TERRITORY (CANBERRA)

VALUE LABEL DAYS	FREQUENCY	PERCENT
1	2	6.1
3	1	3.0
Did not visit	30	90.9
Total	33	100.0

The analysis of the answers to Question 3 revealed the following ranking with regards to states visited:

TABLE 64

RANKING OF VISITED STATES

RANK	STATE/TERRITORY	FREQUENCY	PERCENT
1.	Victoria	31	93.9
2	NSW	25	75.8
3.	Queensland	21	63.6
4.	N.Territory	13	39.4
5.	South Australia	12	36.4
6.	Tasmania	4	12.1
7.	ACT/Canberra	3	9.1
8.	Western Australia	0	0

Victoria was clearly the most visited state with 93.9% of respondents stating that they had visited this state.While this would appear to be an extremely positive result for Victoria,it must be stated that most of the surveying took place in the departure lounge of Melbourne Airport and hence a bias towards Victoria was unavoidable.

TABLE 65

NUMBER OF SURVEYED GERMAN SPEAKING VISITORS BY STATE AND DURATION OF STAY IN DAYS.

	DAYS				
	1-5	6-10	11-15	over 15	Total
NSW	9	11	4	1	25
QLD	6	5	6	4	21
VIC	15	7	2	7	31
SA	6	6	0	0	12
TAS	0	1	2	1	4
NT	11	1	0	1	13
ACT	3	0	0	0	3
WA	0	0	0	0	0

TABLE 66

DURATION OF STAY OF SURVEYED GERMAN SPEAKING VISITORS BY STATE (IN PERCENT).

	DAYS				
	1-5	6-10	11-15	over 15	Total
NSW	36.0	44.0	16.0	4.0	100.0
QLD	28.6	23.8	28.6	19.0	100.0
VIC	48.4	22.6	6.4	22.6	100.0
SA	50.0	50.0	0.0	0.0	100.0
TAS	0.0	25.0	50.0	25.0	100.0
NT	84.6	7.7	0.0	7.7	100.0
ACT	100.0	0.0	0.0	0.0	100.0
WA	0.0	0.0	0.0	0.0	100.0

TABLE 67

Q.4 WHICH OF THE FOLLOWING ATTRACTIONS IN SOUTHERN AUSTRALIA (VICTORIA,TASMANIA,SOUTH AUSTRALIA) DID YOU VISIT?

VALUE LABEL	FREQUENCY	PCT OF RESP.	PCT OF CASES	RANK
Barossa Valley	13	14.1	41.9	3
Phillip Island	14	15.2	45.2	2
Flinders Ranges	4	4.4	12.9	9
Franklin/Gordon	5	5.4	16.1	7
Great Ocean Rd./ 12 Apostles	18	19.6	58.1	1
Cradle Mountain	5	5.4	16.1	7
Sovereign Hill	7	7.6	22.6	5
Cape Schanck- Coastal Park	4	4.4	12.9	9
Hahndorf	3	3.3	9.7	11
Wilsons Promontory	6	6.5	19.4	6
Melbourne Botanical Gardens	13	14.1	41.9	3
Total	89	100.0	287.1	

2 missing cases

The Southern Australian tourist attractions most visited by the respondents were the Great Ocean Road /Twelve Apostles (19.6%),Phillip Island (15.2%) and Melbourne Botanical Gardens and the Barossa Valley both with 14.1%. The least visited attraction was Hahndorf, followed by the Flinders Ranges and Cape Schanck.

TABLE 68

Q.5 <u>WHICH OTHER ATTRACTION (INCLUDING CITIES) HAVE YOU VISITED IN SOUTHERN AUSTRALIA? (Multiple responses were possible).</u>

ATTRACTION	FREQUENCY
Melbourne Zoo	1
Walhalla	1
Hanging Rock	1
90 Mile Beach	1
Grampians	1
Dandenongs	1

The above 6 responses were the only other attractions that visitors mentioned in an open question.

TABLE 69

Q.6 DID YOU HAVE SUFFICIENT INFORMATION ABOUT THE ATTRACTIONS OF SOUTHERN AUSTRALIA PRIOR TO YOUR ARRIVAL?

VALUE LABEL	FREQUENCY	PERCENT
Yes	18	54.5
No	7	21.2
Don't Know	2	6.1
No answer	6	18.2
Total	33	100.0

The percentage of respondents who stated that they had sufficient information about Southern Australia (54.5%) is in line with the results of the inbound survey in which 57.1% of respondents stated that they had received sufficient information.While these percentages are relatively high, attempts will nevertheless have to be made to increase the level of information of potential visitors to Southern Australia.

TABLE 70

Q.7 WHAT WERE YOUR MAIN INTERESTS DURING YOUR HOLIDAY IN SOUTHERN AUSTRALIA?

VALUE LABEL	FRE-QUENCY	PCT OF RESPONSES	PCT OF CASES	RANK
Do nothing	7	5.8	24.1	7
Visit Nature parks	19	15.8	65.5	2
Sightseeing	16	13.3	55.2	3
Explore the country	16	13.3	55.2	3
Swim in the ocean	11	9.2	37.9	5
Shopping	10	8.3	34.5	6
Dining out	5	4.2	17.2	9
Photography	23	19.2	79.3	1
Attend cultural events	3	2.5	10.3	10
Visit museums/ art exhibitions	7	5.8	24.1	7
Practice sport	3	2.5	10.3	10
Total	120	100.0	413.6	

4 missing cases

Photography (19.2%) was the most important interest of actual visitors to Southern Australia. This was followed by visiting Nature Parks (15.8%) and sightseeing and exploring the country (both 13.3%). Combined these activities accounted for 61.6% of activities mentioned.
Practising sport and attending cultural events (both 2.5%) were the least popular activities of the visitors surveyed.

As an addition to Question 7 respondents were asked to indicate any other interests they may have pursued during their stay in Southern Australia. The following responses were received:

Hiking (3 responses)
Visiting Friends and Relatives (2 responses)
Scenery (2 responses)
Walking on the beach,architecture,city sightseeing and scuba diving one response each.

TABLE 71

Q.8 DID SOUTHERN AUSTRALIA FULFIL YOUR EXPECTATIONS?

VALUE LABEL	FREQUENCY	PERCENT
Yes	24	72.7
No	2	6.1
Did not have any expectations	1	3.0
No answer	6	18.2
Total	33	100.0

It is positive to note that the vast majority of respondents (72.7%) stated that Southern Australia had fulfilled their expectations.This can be interpreted as to mean that once visitors have been attracted to the region, the region can live up to their expectations.

TABLE 72

Q.9 IF NO IN Q.8.WHAT DISAPPOINTED YOU IN SOUTHERN AUSTRALIA? (Multiple responses possible)

VALUE LABEL	FREQUENCY	PERCENT
Weather	2	50.0
Population/residents	2	50.0
Total	4	100.0

Only four responses to this question were recorded and responses were evenly divided between a disappointment with the weather and with the local population/residents.

-

TABLE 73

Q.10 IF YES IN Q.8 WHAT ASPECT OF SOUTHERN AUSTRALIA IMPRESSED YOU ESPECIALLY?

VALUE LABEL	FREQUENCY	PCT OF RESPONSES	PCT OF CASES
Nature parks	23	21.5	88.5
Friendly population	21	19.6	80.8
Culture in the cities	7	6.5	26.9
Beach and the ocean	17	15.9	65.4
Wine growing regions	8	7.5	30.8
"Outback"	13	12.1	50.0
Unique fauna	18	16.8	69.2
Total	107	100.0	411.5

7 missing cases

Nature parks (21.5%) ,the friendly population (19.6%) and the unique fauna (16.8%) were the top three ranking things that most impressed the German speaking visitors in Southern Australia.Beaches and Ocean (15.9%) and "Outback"(12.1%) ranked 4th and 5th.Culture in the cities ranked last only accounting for 6.5%.The results of Question 10 further highlight that German visitors have a strong preference for natural attractions.

TABLE 74

Q.11 IN SUMMARY WOULD YOU SAY THAT YOUR STAY IN SOUTHERN AUSTRALIA WAS :

VALUE LABEL	FREQUENCY	PERCENT
Much worse than expected	0	0.0
Worse than expected	1	3.0
As expected	15	45.5
Better than expected	10	30.3
Much better than expected	3	9.1
No answer	4	12.1
Total	33	100.0

The overall satisfaction level with their holidays in Southern Australia was high.45.5% thought that Southern Australia had lived up to their expectations and a pleasing 30.3% stated that in fact their stay was better than expected. 9.1% even thought that their stay was much better than they had anticipated. These figures are further indication that once visitors have been attracted to the region the existing tourist product and infra- structure can provide them with a more than satisfactory holiday.
To a large degree,this result disproves the hypothesis that Southern Australia does not have the tourism infrastructure and attractiveness to attract the German speaking market.

TABLE 75

Q.12 WHICH MODE OF TRANSPORT DID YOU MAINLY USE DURING YOUR STAY IN SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
Hire car	7	21.2
Campervan	4	12.1
Coach	15	45.5
Train	1	3.0
Plane	1	3.0
No answer	5	15.2
Total	33	100.0

Coach (45.5%) ,hire car (21.2%) and campervan (12.1%) were the most used forms of transport in Southern Australia.

TABLE 76

Q.13 APPROXIMATELY HOW MANY AUSTRALIAN DOLLARS DID YOU SPEND PER PERSON PER DAY IN SOUTHERN AUSTRALIA? (INCLUDING ACCOMMODATION, FOOD, TRANSPORT AND SMALL EXTRAS)

VALUE LABEL	FREQUENCY	PERCENT
\$ 30 - \$ 50	7	21.2
\$ 51 - \$100	4	12.1
\$101 - \$150	9	27.3
\$151 - \$200	2	6.1
\$201 - \$250	2	6.1
\$251 - \$300	1	3.0
No answer	8	24.2
Total	33	100.0

On a daily basis, German speaking visitors proved to be relatively low spending visitors.This can most likely be attributed to the relatively long duration of their stay in Australia and indeed their even longer stay away from home.The fact that 8 respondents elected not to answer this question may indicate the sensitive nature of questions regarding money to some people.

TABLE 77

Q.14 WHICH FORM OF ACCOMMODATION DID YOU MAKE MOST USE OF DURING YOUR STAY IN SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
Accommodation of friends and relatives	14	42.4
Up market hotels (4-5 Star)	4	12.1
Mid range hotels (2-3 star)	1	3.0
Budget hotels	1	3.0
Backpackers hostels		
Youth hostels	2	6.1
Motels	3	9.1
Apartments		
Caravanparks/campgrounds	4	12.1
Sleep outside	1	3.0
No answer	3	9.1
Total	33	100.0

By far the most popular form of accommodation was a stay with family and friends (42.4%).This was followed by caravanparks/campgrounds and 4-5 Star Hotels with both categories recording 12.1% of responses.

Q.15 <u>OPEN QUESTION: WHAT RECOMMENDATIONS COULD YOU GIVE THE TOURISM PLANNERS IN SOUTHERN AUSTRALIA THAT WOULD ENABLE THEM TO MAKE YOUR NEXT VISIT EVEN MORE PLEASANT?</u>

Comments received included:

improved directional signage to indicate smaller communities in South Australia

hiking trails and huts for accommodation in the mountains

the "cheap" hotels in the cities are too expensive

improve the conditions of the roads

German versions of pamphlets for national parks

more German brochures and signage in places like airports,railway stations,ferries etc.

information regarding the "Australian way of life" in German

better public transport to National Parks marketing orientated training for tourism employees

control of low cost car rental companies

education of German visitors that may be able to use the services of the RACV provided they are members of the German Automobile Club

graffiti in trains is a disgrace

brochures for Tasmania in German

more German speaking service personnel

more Australian - made souvenirs

sufficient information on Southern Australia is available

Southern Australia is not promoted enough in Germany

Out of the comments received,by far the most significant one is the expressed desire of German speaking visitors to have some information provided to them in their native language.While Germans,Austrians and Swiss are often fairly fluent in English,difficulties in understanding tourism specific jargon may arise.Therefore as a courtesy to German speaking visitors, some visitor information on the Southern states should be produced in German.

TABLE 78

Q.16 PLEASE ANSWER THIS QUESTION ONLY IF YOU HAVE NOT VISITED SOUTHERN AUSTRALIA.
WHAT ARE THE MAJOR REASONS WHY YOU HAVE NOT VISITED SOUTHERN AUSTRALIA?

VALUE LABEL	FREQUENCY	PERCENT
Too European	1	25.0
Scenery wise not what I want to see	2	50.0
Weather conditions Not enough time	1	25.0
Total	4	100.0

Three respondents stated that they had not visited Southern Australia with scenery being the major factor.

13.0 CONCLUSION

The paper set out to establish some of the reasons why Southern Australia appears to be a less attractive tourist destination than Queensland and New South Wales for the German speaking market.It was hypothesised that the apparent lack of clearly identified major tourist attractions and the perceived lack of sunshine/warmth in the region were the major factors that prevented the region from receiving a higher percentage of German speaking visitors .In the course of the research,surveys of arriving German speaking visitors and departing German visitors were carried out to identify their perceptions , expectations and experiences regarding a vacation in Southern Australia. In addition a mail survey of tour operators in Germany,Austria and Switzerland was carried out in order to establish what they thought their clients expected out of a holiday in Australia and in Southern Australia in particular.

The survey of the tour operators revealed that respondents thought that their clients would expect basically the same out of a holiday in Southern Australia as out of a holiday in Australia generally.It also revealed that Queensland was by far the most represented destination in the tour programmes of tour operators and that only a very limited number included attractions in the Southern States into their itineraries.

Regarding the holiday expectations, it was interesting to note that the views of tour operators and visitors were almost identical .Exploring the country,sightseeing and swimming in the ocean were the three most highly ranking activities that both tour operators and visitors listed. It was also found that overall,the vast majority of visitors and tour operators alike placed great emphasis on natural attractions such as National/Nature Parks.It follows that nature should be promoted as the major draw-card of Southern Australia.

The survey of departing visitors showed that for 45.5%, their stay in Southern Australia had been as expected,for 30.3%, it had been better than expected and for 9.1%, it had been much better than expected.Only an extremely small percentage of respondents were disappointed with the weather in the region.

Aspects that impressed visitors most during their stay in Southern Australia included: nature parks , the friendly population, unique fauna as well as beaches and the ocean.

Given the limited sample size of both the inbound and outbound surveys the paper should be treated as a pilot study into a market which has not received much coverage in the Australian context.

A more detailed survey with a larger sample size should therefore be encouraged.This could take the form of distributing questionnaires to hotels and motels,to major tourist attractions and to Australian tour operators who are known to cater for German speaking visitors.By using this approach a greater diversity of German speaking visitors could be surveyed giving a more balanced picture of the German travel patterns.

Circumstances in the airline industry may also change and therefore an approach to them to have questionnaires distributed in flight might stand a better chance to be successful.

Airlines themselves conduct frequent surveys on board their aircraft and with some luck a future researcher into the German market may get access to some of this data.

In conclusion, it can be said that once Southern Australia has attracted visitors to experience the attractions of the region on a vacation;the states do live up to the expectations of visitors.It would appear than that the existing product including the climate are not deficient but that a far greater marketing effort is needed in order to raise the awareness level of potential German speaking visitors of the many and varied attractions in Southern Australia .This increased awareness should translate into an increase in actual visitor numbers from Germany,Austria and Switzerland to Southern Australia.

14.0 RECOMMENDATIONS

In analysing the findings of this paper the author makes the following recommendations:

1. Southern Australia should promote itself around those features which make the region different from the German speaking countries rather than the similarities between them.In practice,this means that Southern Australia should promote its natural uniqueness rather than its European cultural background (see Tables 21,22,and 25 of tour operator survey;Tables 34,35 and 36 of inbound survey ; Table 70 of outbound survey). German speaking visitors will not be enticed to travel half-way around the globe with the promise that they will experience a ride on a tram or that they can attend a performance by a symphony orchestra. Experiences like these are readily available in the German speaking countries and do not therefore, constitute a great attraction to intending visitors.Despite this obvious fact Victoria for example, has in the past used images of trams and the Victorian Arts Centre to promote itself in the German speaking market.

2. The comments made by German speaking wholesalers (see appendix B) should be noted and acted upon by the relevant authorities.These include government bodies and the tourism industry alike .

3. By including or omitting a destination into their brochures and programmes tour wholesalers can have a significant influence on the decision making process of potential travellers.It follows that in order to be successful in attracting a higher number of German speaking visitor, every attempt has to be made to have Southern Australia included into their programmes (Tables 16,17 and 18 show that at present not enough German speaking tour operators include the region into their programmes).
This may involve familiarisation visits for tour operators or support for printing of brochures that contain Southern Australian tourism product.
In this context the Australian Tourism Exchange (ATE) which will be held in Melbourne for the first time during 1991 will provide the Southern states with a great opportunity to introduce German speaking tour operators to what the attractions of the region.Pre - and post ATE touring programmes offered to tour wholesalers will be useful in this respect.

4. Encourage the increasing number of Germans holidaying in South East Asia (refer to Table 24 for the volume of German speaking travel to Asia) to come and visit the more temperate South of Australia as a part of a more varied holiday.One possible way of achieving this aim is to work closely with airlines such as Lauda Air who already offer stop-overs in Asia.With Lauda Air's new service proposed to terminate in Melbourne (via Phuket) this particular carrier could greatly assist in the task of attracting more German speaking visitors away from Asia's beaches and into the Southern region of Australia.

5. Promote more of the Southern Australian countryside in order to get visitors to spend time outside capital cities and in order to distribute the economic benefits of tourism more widely across the various states.In the case of Victoria it has traditionally been Melbourne that received the most exposure in many international marketing efforts.By promoting Victoria for example through images of The Lakes or the Great Ocean Road the state would portrait the image the German speaking visitors want to see (nature).At the same time Melbourne would not miss out on visitors since,by virtue of its international airport it will still remain the gateway to the state and indeed the region.

6. Raise the awareness of the true climatic conditions in the Southern States among tour operators,travel agents and consumers.Highlight that for example,the Murray region has as many or more sunny days as the Gold Coast. At the same time, it is important that potential visitors are made aware that the sun does not always shine and that temperatures can be relatively low during the Winter months.Truthfulness in reporting the climatic conditions can counteract possible disappointment by visitors who visit the region in Winter with the expectation of Summer temperatures.

7. Educate Australia based inbound operators about the tourism products available in Southern Australia (in light of the comments made by the Sydney based operator quoted in section 10.3 this is of utmost importance).The Australian Tourism Exchange in Melbourne in 1991, will be a great opportunity to achieve this goal (pre-and post ATE tour programmes).

8. Examine guide books on Australia in the German speaking market as to their Southern Australian content. If they are found to be deficient with regard to Southern Australia,changes should be suggested to the authors.Support should be given to visiting journalists who are preparing new guidebooks or who are revising existing ones.

9. Promotional material in German would be appreciated by German speaking visitors and should therefore be produced (refer to answers to question 15 in the outbound survey).

10. The German speaking market should be seen as a separate market and should not be dealt with in much the same way as other European markets.

It is the author's hope that the findings and recommendations made in this paper will contribute to increase the number of German speaking visitors to this unique part of Australia.

APPENDIX A.: BACKGROUND TO GERMAN AND SWISS VISITORS

The following data was compiled from the Major Market Report:Continental Europe 'International Visitor Survey, 1988 Bureau of Tourism Research,Canberra' April 1990.

1.EXCHANGE RATES:

As at	$A/DM	$A/Swiss Franc
March 1988	1.2255	1.0129
June 1988	1.4407	1.1934
September 1988	1.4722	1.2468
December 1988	1.5275	1.2939
August 1990	1.2565	1.0670

2.GERMAN VISITOR ARRIVALS BY PURPOSE OF VISIT, 1978 -1989

Year	Holiday	VFR	Business	Convent.	Other	Total
1978	7,050	5,180	2,220	280	3,030	18,420
1979	12,680	8,210	3,410	280	4,220	28,800
1980	16,920	9,030	4,260	450	4,720	35,380
1981	20,090	9,420	4,760	280	4,510	39,060
1982	20,780	9,190	4,790	230	3,910	38,900
1983	18,280	7,910	4,670	400	3,350	34,610
1984	17,440	8,090	5,020	300	3,370	34,220
1985	18,410	8,130	5,940	490	4,360	37,330
1986	22,590	8,520	5,670	320	4,770	41,870
1987	30,980	10,370	6,130	570	5,210	53,260
1988	39,850	11,970	6,810	1,040	6,240	65,910
1989	43,800	11,800	6,800	N.A.	5,800	68,100

3.SWISS VISITORS BY PURPOSE OF VISIT 1978 - 1989

Year	Holiday	VFR	Business	Convention	Other	Total
1978	2,100	1,090	690	60	820	4,760
1979	3,120	1,570	950	60	910	6,610
1980	3,850	1,900	930	160	890	7,730
1981	4,790	2,010	1,060	60	1,200	9,120
1982	6,310	2,240	1,070	110	1,030	10,760
1983	6,690	2,520	1,090	200	1,100	11,600
1984	7,450	2,240	1,310	100	1,430	12,530
1985	8,820	2,280	1,510	170	1,480	14,260
1986	11,270	2,460	1,530	200	1,420	16,880
1987	14,440	2,930	1,870	280	1,820	21,340
1988	17,980	3,380	1,890	500	2,210	25,960
1989	19,900	3,500	1,800	N.A	2,300	27,400

4.REGIONS VISITED BY GERMANS AND SWISS IN 1988 BY VISITORS

Region of stay	Germany		Switzerland	
	Total	Holiday	Total	Holiday
	(Percent)		(Percent)	
Sydney	73	79	81	87
Total NSW	76	82	83	89
Canberra/ACT	15	18	15	18
Melbourne	37	40	44	44
Total VIC	42	43	53	55
Brisbane	36	42	38	45
Gold Coast	15	17	18	22
Grt.Barrier Reef	41	52	51	63
Total QLD	59	68	64	72
Adelaide	28	31	36	44
Total SA	33	37	37	46
Perth	16	18	18	21
Total WA	17	19	19	22
Hobart	3	3	7	9
Total TAS	4	5	7	9
Darwin	14	20	21	25
Alice Springs	23	32	34	44
Total NT	28	37	39	49
Total	273	309	317	360

Source: BTR,IVS 1988

5. REGIONS OF STAY OF GERMAN AND SWISS VISITORS IN 1988 BY VISITOR NIGHTS

Region of stay	Germany		Switzerland	
	Total	Holiday	Total	Holiday
	(Percent)		(Percent)	
Sydney	18	19	22	20
Total NSW	27	27	30	28
Canberra/ACT	3	2	1	1
Melbourne	12	10	10	7
Total VIC	15	12	14	11
Brisbane	13	8	6	5
Gold Coast	3	3	3	3
Grt.Barrier Reef	12	17	17	19
Total QLD	31	33	29	31
Adelaide	9	6	5	5
Total SA	11	9	7	7
Perth	4	4	7	8
Total WA	5	6	9	10
Hobart	1	1	2	2
Total TAS	2	2	3	3
Darwin	2	3	3	3
Alice Springs	2	3	3	3
Total NT	7	9	8	10
Total Nights in '000	2,702	1,489	1,092	826

Source: BTR,IVS 1988

6. ACCOMMODATION USED BY GERMAN AND SWISS VISITORS

Accommodation	Germany Total (Percent)	Germany Holiday (Percent)	Switzerland Total (Percent)	Switzerland Holiday (Percent)
Home of friend/ relative	55	49	48	45
Hotel with facilities in unit	44	47	48	46
Motel with facilities in unit	33	36	37	38
Youth Hostel	17	23	27	37
Caravan,cabin or tent	26	34	29	37
Rented house or flat	5	4	4	3
Guest house/ private hotel	2	2	3	3
On boat houseboat/ cabin cruiser	3	4	3	4
Rented or hired camper-van	3	4	2	3
Hotel/motel with no facilities	3	4	3	5
Other	9	11	7	8
Total	200	218	211	228

7. ACCOMMODATION USED BY GERMAN AND SWISS VISITORS BY VISITOR NIGHTS

Accommodation	Germany		Switzerland	
	Total	Holiday	Total	Holiday
	(Percent)		(Percent)	
Home of friend/ relative	50	32	28	22
Hotel with facilities in unit	11	13	16	17
Motel with facilities in unit	8	9	11	10
Youth Hostel	11	17	18	23
Caravan,cabin or tent	12	19	16	19
Rented house or flat	2	2	4	3
Guest house/ private hotel	1	1	1	1
On boat houseboat/ cabin cruiser	1	1	1	1
Rented or hired camper-van	1	1	1	1
Hotel/motel with no facilities	1	1	3	3
Other	3	2	3	2
Total	100	100	100	100

8. FORMS OF TRANSPORT USED BY GERMAN AND SWISS VISITORS DURING THEIR STAY IN AUSTRALIA

Transport	Germany		Switzerland	
	Total	Holiday	Total	Holiday
	(Percent)		(Percent)	
Local public transport	60	66	72	77
Taxi/ chauffeur driven hire car	57	59	64	63
Ship/boat/ferry	54	61	62	68
Private or company car	51	39	46	38
Rental car	37	32	40	45
Long distance coach	35	39	38	47
Plane	39	41	50	48
Self driven van/ campervan	10	14	6	7
Hitchhiking	5	6	5	7
Other	11	15	16	18

Note: The above column percentages add to more than 100 percent as respondents used more than one form of transport

9. AVERAGE EXPENDITURE DETAILS BY GERMAN AND SWISS VISITORS *

Base:All visitors from the listed countries

Mode of Payment	Germany	Switzerland
	($ AUS)	
Intern.airfares purchased in Australia	26	43
Shopping	298	320
Domestic airfares	94	115
Food,drink,accommodation	1,003	1,323
Organised tours incl. accommodation	44	101
Self drive cars/rent a car/campervans	187	226
Convention registration	1	6
Train or coach fares for long distance travel	73	105
Organised tours not including accommodation	34	66
Horseracing and gambling	30	8
Petrol and oil	90	122
Entertainment	64	92
Taxis/limousines	28	29
Other	198	144
Average Expenditure	2,175	2,704

* On items either pre-paid or in Australia

10. AVERAGE EXPENDITURE BY GERMAN AND SWISS VISITORS*

This table excludes from the average those visitors who answered in the IVS 1988 'don't know' or zero to an item.

Mode of Payment	Germany	Switzerland
	($ AUS)	
Intern.airfares purchased in Australia	1,339	1,292
Shopping	324	340
Domestic airfares	453	440
Food,drink,accommodation	1,032	1,337
Organised tours incl. accommodation	614	763
Self drive cars/rent a car/campervans	571	572
Convention registration	274	1,147
Train or coach fares for long distance travel	243	306
Organised tours not including accommodation	132	209
Horseracing and gambling	350	90
Petrol and oil	204	229
Entertainment	104	131
Taxis/limousines	46	43
Other	244	166
Average Expenditure	2,185	2,704

* On items either pre-paid or in Australia

11. AGE AND SEX OF VISITORS FROM GERMANY AND SWITZERLAND

Age	Germany		Switzerland	
	Male	Female	Male	Female
	(Percent)			
Under 15 years	3	4	3	3
15 - 19 years	3	4	2	3
20 - 24 years	10	13	17	21
25 - 29 years	15	15	21	23
30 - 34 years	12	9	12	9
35 - 39 years	10	8	7	7
40 - 44 years	9	7	7	5
45 - 49 years	13	9	8	6
50 - 54 years	9	8	7	6
55 - 59 years	6	6	5	6
60 + years	12	18	10	11
Total	100	100	100	100

Note:55% of German and Swiss visitors were male

12.TOTAL LENGTH OF TRIP AND NIGHTS SPENT IN AUSTRALIA

	Average number of nights spent		Median number of nights spent	
	On whole trip	In Australia	On whole trip	In Australia
Germany	58	41	38	30
Switzerland	84	42	47	29

13. INFORMATION SOURCES

Advertising seen or heard about Australia by German and Swiss visitors

Form of advertising	Germany	Switzerland
	(Percent)	
On television	60	41
On radio	16	10
In magazines	74	63
In newspapers	63	54
Don't know/no answer	12	24
Feature articles/travel films seen on Australia/ read travel articles in newspapers/ magazines	79	70
Did not read any articles or features	19	29
Saw travel films or travel documentaries	73	67
Did not see any films or documentaries	35	32

14.TRAVEL ARRANGEMENTS

	Germany		Switzerland	
	Total	Holiday	Total	Holiday
TRAVEL PARTY	(Percent)		(Percent)	
Travelled unaccompanied	52	43	48	40
Adult male and female	23	29	21	23
Family group-parents and children	5	5	4	3
Friends/relatives travelling together	19	21	26	33
Other	1	2	2	1
Total	100	100	100	100

TRAVEL ARRANGEMENTS PRE-PURCHASED BY VISITORS

	Germany		Switzerland	
	Holiday	Total	Holiday	Total
	(Percent)		(Percent)	
International airfare	95	94	94	95
Airfares within Australia	16	18	24	23
Organised tours in Australia	6	9	6	7
Nett accommodation in Australia	15	20	15	18
Nett ground transport in Australia	12	18	13	16
Nett meals in Australia	6	9	7	8
Entertainment in Australia	3	3	4	5
Other items	1	1	3	4
BOOKING AGENTS USED:				
Travel agents	79	75	82	86
Airline	13	18	11	9
Other	4	4	3	2

15.CITY OF ARRIVAL AND DEPARTURE -GERMAN VISITORS

City	City of Arrival		City of Departure	
	Total	Holiday	Total	Holiday
		(Percent)		
Sydney	55	60	54	56
Melbourne	18	15	21	19
Perth	9	8	7	6
Brisbane	9	6	10	8
Adelaide	4	3	4	3
Darwin	3	4	3	4
Townsville	-	-	1	1
Cairns	2	3	2	3
Total	100	100	100	100

16.CITY OF ARRIVAL AND DEPARTURE -SWISS VISITORS

City	City of Arrival		City of Departure	
	Total	Holiday	Total	Holiday
		(Percent)		
Sydney	54	58	61	65
Melbourne	19	15	13	10
Perth	9	11	7	6
Brisbane	8	8	8	7
Adelaide	2	1	2	1
Darwin	5	5	3	4
Townsville	1	1	1	1
Cairns	2	2	6	7
Total	100	100	100	100

17. WHY GERMAN AND SWISS VISITORS CAME TO AUSTRALIA IN 1988

A. Which of these things made you first think about coming to Australia on this trip?

	Germany	Switzerland
Friends/relatives in Australia	31	18
Always wanted to visit Australia	29	30
Friends/relatives at home	9	20
Films or TV programs seen on Australia	1	1
Television advertisements	1	2
Heard that 1988 is Australia's Bicentenary	3	1
Articles or features about Australia in newspapers or magazines	2	3
Something else/don't know/ no answer	23	26

17.B. Why did you choose to come to Australia for this holiday rather than some other country?

	Germany	Switzerland
		(Percent)
Wanted to see the country/ never been/curious	19	21
To visit family/relatives etc.	7	7
To see friends/have friends living here/was invited	12	12
Weather/climate/warm/sunny	11	15
Like Australia/have been before and like it	9	5
People friendly/like Australians/to meet people	6	15
To see wildlife/fauna/native animals/kangaroos	6	13
Holiday/good place for a holiday	5	6
Scenery/variety of scenery	7	5
Summer here/to skip winter	7	9
Wanted to see other half of world	5	6
To see nature/natural wonders	5	6
To see Great Barrier Reef	4	4
Have read/heard so much about it	4	6
To attend special event/music/ festival/convention	4	5
To visit Sydney	3	4
Good reports from friends/relatives	2	3
Part of world tour/Pacific tour	1	4
English speaking	2	2

APPENDIX B: GERMAN SPEAKING TOUR OPERATORS COMMENTS

Comment one:

"Unfortunately it is a reality that most [German] visitors pay no or very little attention to the attractions in the Southern States of Australia.

Why? The main reason is that most visitors try to see as much as possible in a relatively short time. As a result they concentrate on the well known attractions. Many [visit ors] appear also to have an underlying fear to have missed something if they have not visited Ayers Rock,Sydney or the Great Barrier Reef.

Apart from that,visiting[for example] Kangaroo Island does not carry any particular prestige at home. An attendance of an opera performance in the Sydney Opera House is different, because friends and relatives at home may have heard of it.

Basically it is a problem of how well known attractions [or regions] are. Hand in hand with this goes the perception that what is well known is also safe and hence "good", what is unknown is a gamble.

Since most people strive for security in their daily lifes this is not any different while they are on holidays."

Source: W. Roggenkamp,Australian Tourconsult,Munich.

Comment two:

"....your letter and questionnaire seem to be based on (as is usually the case from Australia) some basically wrong expectations. Hence the following comments.

The German visitor has little idea about the different Australian states,maybe with the exception of the Northern Territory.

Known are mainly Sydney with the harbour and opera,maybe the Blue Mountains, in the "Red Heart" Alice Springs with Ayers Rock and in the Top End Darwin with the Kakadu National Park and the Great Barrier Reef with the islands. More recently maybe also Monkey Mia with the dolphins.

Melbourne does not have the attractiveness and popularity of Sydney (and will not get it either). Compared to the tropical rainforests of the North in the Top End (together with the respective plants and animals) and the red deserts and rocks of the Red Centre together with being sacred Aboriginal sites, the Southern states have nothing similarly attractive to offer.

Nevertheless it is of interest to note that at least 80% of our clients do not just visit one region or state.Some clients might fly into Sydney and than travel (either by themselves or in an organised group) through Victoria and South Australia to the Northern Territory and on to Queensland from where they may fly back home.

The same likelihood is that visitors fly into Darwin and than leave from Sydney,Melbourne or Adelaide.To attract [German] visitors exclusively or for longer periods of time to the Southern States is hardly possible - we do however occasionally incorporate a week in Tasmania or a few days on Kangaroo Island into our programs. Concerning specifically Kangaroo Island, there is a lack of good quality packages for 2,3, or 4 days.
Compared to destinations in other states the promotion is also fairly poor.Other states such as Queensland and the Northern territory support us (also financially for printing and mailing costs) and provide us with good information and brochure material -something that is almost completely lacking from the Southern states.
Southern Australia is not likely to succeed as a one destination holiday region but with better modules such as Kangaroo Island, Phillip Island, the Dandenong Ranges ect. it would be far easier to sell.In addition many years of improved information on these destinations are also required ."

Source: Klaus Lessenich,Australien Reisen Lessenich,Herten-Westerholt,West Germany.

Comment three:

" In 1980 we wrote an Australian travel guide and when we visited Australia during 1988 to update the guide we received the least support from the Southern States (with the exception of Tasmania).This may well be a reflection of the "official attitude" [towards tourism] and may explain the client behaviour [explain why not more German speaking visitors are visiting the Southern States].

Source: Adventure Holidays, Nuremberg,West Germany

Comment four:

"The answer to the question why German speaking visitors visit Victoria,Tasmania and South Australia less than other states is: TIME. In general the duration of the holiday is 3 to 5 weeks. As a result only the main attractions of Australia are visited". [In the opinion of this tour operator these do not include attractions in Southern Australia].

Source: Horizonte Reisen,Hischberg,West Germany

Comment five:

"The climatic conditions[in the Southern States] are worse-[than in the other states].

Melbourne is too puritan and too Victorian."

Source: Wikinger Reisen

Comment six:

"Obviously the tourists think of the Southern States as too cold and too European".

Source: West Tours,Bonn

Comment seven:

" Unfortunately the Southern States are less frequented by German speaking visitors. The major visitor destinations in Australia are Ayers Rock,Sydney,Cairns and Darwin.These places represent a MUST for many visitors,thus leaving little time for Western Australia and Southern Australia."

Source: IKARUS Tours,Koenigstein/Taunus

Comment eight:

"Domestic airfares are too high"

Source: Studiosus Reisen,Munich

Comment nine:

"The other parts of Australia offer more for "Nature Lovers" than the Southern States."

Source: Natur Studienreisen,Northeim

The following comments were received from Swiss tour operators:

Comment one:

"Visitors from Central Europe search mainly for sun,sea and adventure which is more likely to be found in Northern Australia.

During the Australian summer bookings for Southern Australia are however continuously increasing.

The South as the most densely populated region with many cities does not offer the same attractiveness as the North (Outback)".

Source: SSR Reisen,Zurich,Switzerland

Comment two:

"Apart from more informative material on Southern Australia it would be appreciated if the three states[Victoria,Tasmania,South Australia], could organise familiarisation visits for German speaking tour operators"

Source: Knecht Reisen,Baden,Switzerland

Comment three:

"The domestic flights in Australia make tours very expensive."

Source: Hotelplan Zurich,Switzerland

Comment four:

Based on my personal experiences I would like to add the following thoughts to your questionnaire:

" Due to a longer visit to Victoria and personal friendships in this state I am personally convinced of the states tourism potential.

I have also visited South Australia and Tasmania and feel that they too can offer excellent [tourism] products which could very well be successful in the German speaking market.

Even though tour operators are slowly starting to become aware of this,there are still a number of difficulties that we have to overcome.

1.Australia is mainly visited during the European winter. Agency staff and clients are still of the opinion that the whole country is suitable for travel during this period.

In personal conversations I have tried to switch clients to the South with the remark that during this period travel North of the Tropic of Capricorn is only possible to a limited extent.

I am of the opinion that the State tourist offices [of the Southern States] and the ATC should concentrate more on the education of [European] sales staff regarding this fact. A table of climatic conditions alone is not enough.In 1989 we have included Tasmania for the first time in our programme and in 1990 we also plan to expand our Victorian product offer.At present the demand for these new products is fairly low and hence it is not easy to convince the top management of the company of the value of these programs. Apart from the above mentioned,I would like to add that it would be beneficial to consider Melbourne and Adelaide as the location for ATE in order to raise the profile of these two cities.It would also be good to reduce the rivalry between the states and thus tackle the problem together. I am convinced that tourism to Australia would benefit from this move.

Source: H.P. Brasser, Product Manager Australia/South Pacific,

Jelmoli Reisen,Zurich,Switzerland

GERMAN AND ENGLISH VERSIONS OF THE SURVEY QUESTIONNAIRE FOR GERMAN SPEAKING TOUR OPERATORS

FRAGEBOGEN FUER REISEVERANSTALTER IN DEUTSCH SPRACHIGEN LAENDERN

1. SEIT WIEVIELEN JAHREN VERANSTALTEN SIE REISEN NACH AUSTRALIEN?
   UNTER 1 JAHR..1
   1-2...2
   3-5...3
   UEBER 5...4

2. BEINHALTEN IHRE PROGRAMME ATTRAKTIONEN IM SUEDLICHEN AUSTRALIEN ?

VICTORIA	JA.....1	NEIN.....2
SUED AUSTRALIEN	JA.....3	NEIN.....4
TASMANIEN	JA.....5	NEIN.....6

   WENN NEIN, BEABSICHTIGEN SIE DAS SUEDLICHE AUSTRALIEN IN DEN NAECHSTEN JAHREN IN IHRE PROGRAMME AUFZUNEHMEN?
   JA.....7   NEIN.....8

3. WELCHER AUSTRALISCHE BUNDESSTAAT IST AM MEISTEN IN IHREN PROGRAMMEN VERTRETEN?
   QUEENSLAND...........................1
   NEW SOUTH WALES......................2
   VICTORIA.............................3
   TASMANIA.............................4
   SOUTH AUSTRALIA......................5
   WESTERN AUSTRALIA....................6
   NORTHERN TERRITORY...................7
   A.C.T (CANBERRA).....................8

4. WELCHEN AUSTRALISCHEN ZIELFLUGHAFEN BENUTZEN SIE HAUPTSAECHLICH BEIM <u>HINFLUG</u>?

   SYDNEY......................1
   MELBOURNE...................2
   ADELAIDE....................3
   BRISBANE....................4
   PERTH.......................5
   CAIRNS......................6

5. WELCHEN AUSTRALISCHEN FLUGHAFEN BENUTZEN SIE HAUPTSAECHLICH BEIM <u>RUECKFLUG</u>?

   SYDNEY......................1
   MELBOURNE...................2
   ADELAIDE....................3
   BRISBANE....................4
   PERTH.......................5
   CAIRNS......................6

6. WAS GLAUBEN SIE ERWARTEN IHRE KUNDEN VON EINEM AUSTRALIEN URLAUB? BITTE KREUZEN SIE EINE ODER MEHRERE MOEGLICHKEITEN AN.

ABENTEUER....................1
"FREIHEIT"...................2
MENSCHENLEERE STRAENDE.......3
SONNE/WAERME.................4
AUSSERGEWOEHNLICHE TIERE.....5
"OUTBACK",NATUR..............6
FREUNDLICHE EINWOHNER........7
BEEINDRUCKENDE STAEDTE.......8
KULTUR/GESCHICHTE............9
ANDERE AKTIVITAETEN:..................................
....
....
....

7. WAS GLAUBEN SIE ERWARTEN IHRE KUNDEN VON EINEM URLAUB IM <u>SUEDLICHEN AUSTRALIEN</u> (VICTORIA,TASMANIEN,SUED AUSTRALIEN)?

DAS GLEICHE WIE IN FRAGE 6.... 1
KULTUR(MUSIK,KUNSTGALLERIEN,ETC.)....2
SONSTIGES...
....
....
....

8. GLAUBEN SIE IHRE KUNDEN SIND UEBER DAS SUEDLICHE AUSTRALIEN AUSREICHEND INFORMIERT?
JA.....1 NEIN.....2

9. SIND <u>SIE</u> UEBER DAS EXISTIERENDE ANGEBOT AN BESUCHER ATTRAKTIONEN IM SUEDLICHEN AUSTRALIEN AUSREICHEND INFORMIERT?
JA.....1 NEIN.....2

10. WENN NEIN IN FRAGE 9 FUER WELCHE ART VON ATTRAKTIONEN IM SUEDLICHEN AUSTRALIEN WUERDEN SIE INFORMATIONEN BENOETIGEN?

....
....
....

11. WAS SIND IHRER MEINUNG NACH DIE MEISTGEFRAGTEN AKTIVITAETEN DENEN IHRE KUNDEN IN IHREM AUSTRALIEN URLAUB NACHGEHEN WOLLEN? BITTE KREUZEN SIE EINE ODER MEHRERE ALTERNATIVEN AN.

FAULENZEN.....................................1
WANDERN.......................................2
SIGHTSEEING...................................3
DAS LAND ERFORSCHEN...........................4
BADEN IM OZEAN................................5
EINKAUFEN GEHEN...............................6
KULTUR VERANSTALTUNGEN BESUCHEN...............7
SPORT TREIBEN.................................8
SONSTIGE AKTIVITAETEN.........................
....
....
....
....

12. GLAUBEN SIE DAS DIE KULTUR UND LEBENSWEISE DER AUSTRALISCHEN UR-EINWOHNER EINE BESONDERE ANZIEHUNGSKRAFT AUF DEUTSCH SPRECHENDE BESUCHER HAT?
JA.....1 NEIN.....2

13. VIELE DEUTSCHSPRACHIGE BESUCHER LANDEN DERZEIT IN MELBOURNE,FLIEGEN ABER SOFORT WEITER NACH SYDNEY OHNE DAS SUEDLICHE AUSTRALIEN GESEHEN ZU HABEN.
GLAUBEN SIE DAS DIE GEPLANTE EINFUEHRUNG EINER SCHNELLZUG VERBINDUNG DIE BESUCHER IN DREI STUNDEN VON MELBOURNE NACH SYDNEY BRINGEN KANN, EINEN EINFLUSS AUF DAS REISEVERHALTEN DEUTSCH SPRECHENDER BESUCHER BEZUEGLICH DES SUEDLICHEN AUSTRALIENS HABEN WIRD ?
....
....
....
....

14. WIEVIELE AUSTRALIEN REISEN VERKAUFEN SIE UNGEFAEHR PRO JAHR?
1-50.....1 51-100.....2 101-150.....3 151-200.....4
201-250.....5 251-300.....6 301-350.....7 351-400.....8
UEBER 400.....9

WENN ES IHRE ZEIT ERLAUBT WAERE ICH IHNEN FUER WEITERE ANREGUNGEN UND BEMERKUNGEN BEZUEGLICH POTENTIELLER BESUCHER IM SUEDLICHEN AUSTRALIEN DANKBAR.
....
....
....
....
....

VIELEN DANK FUER IHRE UNTERSTUETZUNG

Translation of the survey questionnaire for German speaking tour operators

Question 1

For how many years have you been operating tours to Australia? Under one year; 1 - 2 years; 3 - 5 years; over 5 years.

Question 2

Do your programs contain attractions in Southern Australia?

Victoria yes ... no... South Australia yes... no...

Tasmania yes... no...

Question 3

Which Australian state is most represented in your programs? Queensland;New South Wales; Victoria; Tasmania; South Australia; Western Australia; Northern Territory; Canberra (ACT)

Question 4

Which Australian airport do you use as the principal gateway to the country?

Sydney;Melbourne;Adelaide;Brisbane;Perth;Cairns.

Question 5

Which Australian airport do yo mainly use for the return flight to Europe?

Sydney;Melbourne; Adelaide; Brisbane; Perth; Cairns.

Question 6

What do you think your clients expect from an Australian holiday?

Adventure;"Freedom";Deserted beaches;Sunshine/Warmth;Unusual animals;"Outback"/Nature;Friendly people;Impressive cities;Culture and history; Business/Investment. other attractions.

Question 7

What do you think your clients expect from a holiday in Southern Australia?

The same as from an Australian holiday; Culture (music/art galleries); Other.

Question 8

Do you believe that your clients are well informed about Southern Australia?

yes... no... don't know...

Question 9

Do you think you are well informed about the available tourist attractions in Southern Australia?

yes... no...

Question 10

If "No" in question 9 what kind of information on Southern Australia would you require? Open question.

Question 11

In your opinion what are the most asked for activities your clients would like to do during their Australian holiday?

Do nothing;Hiking;Sightseeing;Explore the country;Swim in the ocean;Shopping;Visit cultural events;Practise sport.Other activities.

Question 12

Do you think that the culture and lifestyle of the Australian Aboriginals has a special attractiveness for German speaking visitors?

yes... no...

Question 13

Many German speaking visitors arrive in Melbourne but fly straight on to Sydney without having visited Southern Australia.Do you think that the possible introduction of a very fast train (VFT) which could transport visitors in three hours between Melbourne and Sydney will have an impact on the travel pattern of German speaking visitors?

Initially an open question,but responses received were in " yes;no;don't know;don't think so and maybe " form.

Question 14

How many trips to Australia do you sell in a year?

1-50;51-100;101-150;151-200;201-250;251-300;301-350;351-400; over 400.

If your time allows I would be grateful to you,if you could provide further suggestions regarding potential visitor to Southern Australia.

Thank you.

GERMAN AND ENGLISH VERSIONS OF THE

INBOUND SURVEY QUESTIONNAIRE

SEHR GEEHRTER PASSAGIER,

UM ES DER TOURISMUS INDUSTRIE IM SUEDLICHEN AUSTRALIEN (VICTORIA,TASMANIEN,SOUTH AUSTRALIA) ZU ERMOEGLICHEN IHREN URLAUB SO ANGENEHM WIE MOEGLICH ZU MACHEN ,MOECHTEN WIR SIE BITTEN DEN FOLGENDEN FRAGEBOGEN MOEGLICHST KOMPLETT AUSZUFUELLEN.
BITTE MARKIEREN SIE DIE FUER SIE ZUTREFFENDEN ANTWORTEN.

1. IST DIES IHR ERSTER BESUCH IN AUSTRALIEN?
JA......1 NEIN.....2

2. WENN NEIN, WIE OFT WAREN SIE SCHON IN AUSTRALIEN? ....

3. WIE LANGE BEABSICHTIGEN SIE IN AUSTRALIEN ZU BLEIBEN? .... TAGE.

4. WIEVIELE TAGE BEABSICHTIGEN SIE IM SUEDLICHEN AUSTRALIEN(VICTORIA,TASMANIEN, SOUTH AUSTRALIA) ZU VERBRINGEN?

KEINE.....1 WENN KEINE, GEHEN SIE BITTE ZU FRAGE 8

WIEVIELE TAGE?............

5. IN WELCHEM DER SUEDLICHEN STAATEN BEABSICHTIGEN SIE DIE MEISTE ZEIT ZU VERBRINGEN?

VICTORIA..........1
TASMANIEN.........2
SOUTH AUSTRALIA...3 UNENTSCHLOSSEN...4

6. WAS ERWARTEN SIE VON DEN SUEDLICHEN STAATEN? BITTE KREUZEN SIE EINE ODER MEHRERE ANTWORTEN AN.

SONNE/WAERME............................1
EINSAME STRAENDE........................2
INTERESSANTE LANDSCHAFT.................3
EINZIGARTIGE TIERWELT...................4
WELTSTAEDTE.............................5
KULTURELLE VERANSTALTUNGEN..............6
MENSCHENLEERE GEGENDEN..................7
SPORT MOEGLICHKEITEN....................8
BEDEUTENDE SPORTVERANSTALTUNGEN.........9
"OUTBACK"...............................10
SONSTIGES...............................
....
....
....
....
....
....

7. WAS SIND IHRE HAUPTINTERESSEN WAEHREND IHRES SUED AUSTRALIEN AUFENTHALTS?

FAULENZEN...............................1
NATURPARKS BESUCHEN.....................2
SIGHTSEEING.............................3
DAS LAND ERFORSCHEN.....................4
SCHWIMMEN IM OZEAN......................5
EINKAUFEN GEHEN.........................6
GUT ESSEN GEHEN 7
PHOTOGRAPHIEREN.........................8
KULTURELLE VERANSTALTUNGEN..............9
MUSEEN/KUNSTAUSSTELLUNGEN...............10
SPORT TREIBEN...........................11
ANDERE INTERESSEN.......................
....
....
....
....
....

8. <u>BITTE BEANTWORTEN SIE DIESE FRAGE NUR WENN SIE FRAGE 4 MIT"KEINE" BEANTWORTET HABEN</u>.

8 A. WAS IST DER <u>HAUPTGRUND</u> WARUM SIE DAS SUEDLICHE AUSTRALIEN (VICTORIA,TASMANIEN UND SUED AUSTRALIEN) NICHT BESUCHEN WERDEN?

NICHT GENUEGEND
INFORMATIONEN..............................1
ZU EUROPAEISCH. 2
LANDSCHAFTLICH UNINTERESSANT............3
BIETET NICHT WAS ICH SEHEN WILL........4
ANDERE GRUENDE.........................

....
....
....

8 B. WUERDEN SIE EINEN AUFENTHALT IM SUEDLICHEN AUSTRALIEN IN ERWAEGUNG ZIEHEN,WENN EIN ZUG EXISTIEREN WUERDE DER SIE IN DREI STUNDEN VON MELBOURNE NACH SYDNEY BRINGEN KOENNTE?

JA......1 NEIN.......2

9. WELCHE DER FOLGENDEN TOURISTEN ATTRAKTIONEN IM SUEDLICHEN AUSTRALIEN (VICTORIA,TASMANIEN,SUED AUSTRALIEN) SIND IHNEN BEKANNT?

BAROSSA VALLEY.........................1
PHILLIP ISLAND.........................2
FLINDERS RANGES........................3
FRANKLIN/GORDON RIVER..................4
GREAT OCEAN ROAD/ 12 APOSTEL...........5
CRADLE MOUNTAIN........................6
SOVEREIGN HILL 7
CAPE SCHANCK COASTAL PARK..............8
HAHNDORF...............................9
WILSONS PROMONTORY.....................10
SONSTIGE ATTRAKTIONEN IM SUEDLICHEN AUSTRALIEN DIE IHNEN BEKANNT SIND:
....
....
....
....
....

10. WAS GLAUBEN SIE SIND DIE HAUPT-ATTRAKTIONEN MELBOURNES FUER DEUTSCH SPRECHENDE BESUCHER?

BOTANISCHER GARTEN UND STADT PARKS......1
STRAENDE UND DER OZEAN..................2
FEINE RESTAURANTS.......................3
DIE VIELRASSIGE BEVOELKERUNG............4
MELBOURNES SPORT EREIGNISSE.............5
KUNST UND KULTUR VERANSTALTUNGEN........6
VIKTORIANISCHER BAUSTIL.................7
WEISS NICHT.............................8
ANDERE ATTRAKTIONEN.....................
....
....

11. HABEN SIE VOR IHREM ABFLUG GENUEGEND INFORMATIONEN UEBER DAS SUEDLICHE AUSTRALIEN ERHALTEN? JA....1 NEIN....2

12. WENN JA, WOHER BEKAMEN SIE DIESE INFORMATIONEN?
REISEBUERO..............................1
AUSTRALISCHES FREMDENVERKEHRS BUERO.....2
FREMDENVERKEHRS BUERO EINES DER STAATEN
VICTORIA................................3
TASMANIEN...............................4
SOUTH AUSTRALIA.........................5

13. WELCHE TRANSPORTMITTEL BEABSICHTIGEN SIE WAEHREND IHRES AUFENTHALTS IM SUEDLICHEN AUSTRALIEN <u>FUER DIE LAENGSTEN STRECKEN</u> ZU BENUTZEN?
(MEHRFACH NENNUNGEN MOEGLICH)

MIETWAGEN...............................1
CAMPERVAN...............................2
BUS.....................................3
ZUG.....................................4
FLUGZEUG................................5
ANDERES VERKEHRSMITTEL..................
....
....

14. WELCHE VERKEHRSMITTEL BEABSICHTIGEN SIE WAEHREND IHRES AUFENTHALTS IM SUEDLICHEN AUSTRALIEN SONST NOCH ZU BENUTZEN?
....
....
....

15. WELCHE FORM VON UNTERKUNFT BEABSICHTIGEN SIE WAEHREND IHRES AUFENTHALTS IM SUEDLICHEN AUSTRALIEN(VICTORIA,TASMANIEN, SOUTH AUSTRALIA) HAUPTSAECHLICH ZU BENUTZEN?

WOHNUNG VON FREUNDEN UND VERWANDTEN......1
HOTELS DER GEHOBENEN KLASSE..............2
HOTELS DER MITTLEREN KLASSE..............3
BUDGET HOTELS............................4
HERBERGEN FUER RUCKSACKREISENDE..........5
JUGENDHERBERGEN..........................6
MOTELS...................................7
APPARTMENTS..............................8
CARAVANPARKS/ZELTPLAETZE.................9
DRAUSSEN SCHLAFEN........................10
ANDERE UNTERKUNFT........................
....
....

16. WELCHEN TEIL IHRES AUSTRALIEN AUFENTHALTS HABEN SIE VOR IHRER ABREISE GEBUCHT UND BEZAHLT?

DEN GESAMTEN AUFENTHALT IN AUSTRALIEN.....1
NUR DEN FLUG.............................2
DEN FLUG UND EINIGE NAECHTE UNTERKUNFT....3
DEN FLUG UND EINEN MIETWAGEN.............4
DEN FLUG UND EIN WOHNMOBILE..............5
KEINEN...................................6

17. MIT WIEVIELEN PERSONEN REISEN SIE?
ALLEIN 1
MIT PARTNER..............................2
MIT PARTNER UND KINDERN..................3
IN EINER GRUPPE MIT......PERSONEN.........4

18. VON WELCHEM AUSTRALISCHEN FLUGHAFEN WERDEN SIE DEN RUECKFLUG NACH EUROPA ANTRETEN?
MELBOURNE................................1
SYDNEY...................................2
BRISBANE.................................3
CAIRNS...................................4
PERTH....................................5
ADELAIDE.................................6
DARWIN...................................7
TOWNSVILLE...............................8

19. WELCHEN GESCHLECHTS SIND SIE?
MAENNLICH.....1   WEIBLICH.....2

20. WELCHE LAENDER IM SUEDPAZIFISCHEN RAUM BEABSICHTIGEN SIE AUF DIESER REISE SONST NOCH ZU BESUCHEN?
KEINE....1 FIJI.....2 NEU SEELAND........3
NEW CALEDONIA....4 TAHITI.............5
SONSTIGE...................................
....
....

21. AUF WELCHEN KONTINENTEN HABEN SIE VOR DIESER REISE NACH AUSTRALIEN SCHON EINEN URLAUB VERBRACHT?

AUSTRALIEN......1 ANTARKTIS.......2
AFRIKA..........3 ASIEN...........4
NORD AMERIKA....5 SUED AMERIKA....6

22.WIEVIELE AUSTRALISCHE DOLLARS GLAUBEN SIE PRO PERSON PRO TAG IN SUED AUSTRALIEN AUSZUGEBEN?
(EINSCHLIESSLICH UNTERKUNFT,VERPFLEGUNG, TRANSPORT UND KLEINEREN EXTRAS)

$ 30 - $ 50....1 $ 51 - 100.....2
$101 - $150....3 $151 - 200.....4
$201 - $250....4 $251 - 300.....5
$301 - $350....5 UEBER $350.....6

23.WIEVIELE EINWOHNER HAT IHR HEIMATORT?

UNTER 10,000..............................1
10,000-50,000.............................2
51,000 - 100,000..........................3
101,000 - 200,000.........................4
201,000 - 500,000.........................5
501,000 -1,000,000........................6
UEBER EINE MILLION. 7

24.IN WELCHEM BUNDESLAND ODER KANTON LIEGT IHR HEIMATORT?
....

25. IN WELCHE ALTERSGRUPPE FALLEN SIE?
18-25....1 26-35....2 36-45....3
46-55....4 56-65....5 UEBER 65....6

TRANSLATION OF INBOUND QUESTIONNAIRE FOR GERMAN SPEAKING VISITOR SURVEY.
THOMAS G. BAUER, FOOTSCRAY INSTITUTE OF TECHNOLOGY

Q.1. IS THIS YOUR FIRST VISIT TO AUSTRALIA?

Q.2. IF NO, HOW MANY TIMES HAVE YOU BEEN TO AUSTRALIA BEFORE?

Q.3. HOW MANY DAYS DO YOU INTEND TO STAY IN AUSTRALIA?

Q.4. HOW MANY DAYS DO YOU INTEND TO STAY IN SOUTHERN AUSTRALIA?
(VICTORIA, TASMANIA, SOUTH AUSTRALIA)
IF ZERO DAYS PLEASE GO TO QUESTION 8.

Q.5. IN WHICH OF THE SOUTHERN STATES DO YOU INTEND TO SPEND THE MOST TIME?

Q.6. WHAT DO YOU EXPECT FROM THE SOUTHERN STATES?
SUN/WARMTH
ISOLATED BEACHES
INTERESTING LANDSCAPES
UNIQUE WILDLIFE
COSMOPOLITAN CITIES
CULTURAL EVENTS
SPARSELY POPULATED AREAS
SPORTING OPPORTUNITIES
IMPORTANT SPORTING EVENTS
OUTBACK
OTHERS

Q.7. WHAT WILL BE YOUR MAIN INTERESTS DURING YOUR STAY IN SOUTHERN AUSTRALIA?

DOING NOTHING
VISIT NATIONAL PARKS
SIGHTSEEING
EXPLORE THE COUNTRY
SWIMMING IN THE OCEAN
SHOPPING
DINING OUT
TAKE PHOTOGRAPHS
VISIT CULTURAL EVENTS
VISIT MUSEUMS/ART GALLERIES
SPORT
OTHER INTERESTS

Q.8. PLEASE ANSWER THIS QUESTION ONLY IF YOU HAVE ANSWERED NO IN QUESTION 4.

WHAT IS THE MAIN REASON WHY YOU WILL NOT VISIT SOUTHERN AUSTRALIA?
NOT ENOUGH INFORMATION
TOO EUROPEAN
UNINTERESTING SCENERY
DOES NOT OFFER WHAT I WANT TO SEE
OTHER REASONS

Q.8B. WOULD YOU CONSIDER A VISIT IN SOUTHERN AUSTRALIA IF THE VFT WOULD EXIST.

Q.9. WHICH OF THE FOLLOWING TOURIST ATTRACTIONS IN SOUTHERN AUSTRALIA HAVE YOU HEARD OF?
BAROSSA VALLEY
PHILLIP ISLKAND
FLINDERS RANGES
FRANKLIN/GORDON RIVER
GREAT OCEAN ROAD/12 APOSTELS
CRADLE MOUNTAIN
SOVEREIGN HILL
CAPE SCHANCK COASTAL PARK
HAHNDORF
WILSONS PROMONTORY
OTHER ATTRACTIONS WHICH YOU HAVE HEARD OF.

Q.10. WHAT DO YOU BELIEVE ARE THE MAIN ATTRACTIONS OF MELBOURNE FOR GERMAN SPEAKING VISITORS?

BOTANICAL GARDEN AND CITY PARKS
BEACHES AND THE OCEAN
GOOD RESTAURANTS
THE COSMOPOLITAN POPULATION
ART/CULTURAL EVENTS
VICTORIAN ARCHITECTURE
DON'T KNOW
OTHERS

Q.11. DID YOU RECEIVE ENOUGH INFORMATION ON SOUTHERN AUSTRALIA PRIOR TO YOUR DEPARTURE?

Q.12. IF YES IN Q.11. WHERE DID YOU GET THIS INFORMATION?

TRAVEL AGENT
ATC
VTC
TASMANIAN TOURIST BUREAU
SOUTH AUSTRALIAN TOURIST BUREAU

Q.19. ARE YOU MALE OR FEMALE?

Q.20. WHICH OTHER COUNTRIES IN THE SOUTH PACIFIC WILL YOU VISIT ON THIS TRIP?

NONE
FIJI
NEW ZEALAND
NEW CALEDONIA
TAHITI
OTHERS

Q.21 WHICH CONTINENTS HAVE YOU VISITED PRIOR TO YOUR PRESENT TRIP TO AUSTRALIA?

AUSTRALIA	ANTARCTICA	AFRICA
NORTH AMERICA	SOUTH AMERICA	ASIA

Q.22 HOW MANY AUSTRALIAN DOLLARS ARE YOU PLANNING TO SPEND PER DAY AND PERSON WHILE VISITING SOUTHERN AUSTRALIA? (INCLUDING ACCOMMODATION, FOOD, TRANSPORT AND SOME SMALLER EXTRAS)?

Q.23 WHAT IS THE POPULATION OF YOUR PLACE OF RESIDENCE?

Q.24 IN WHICH STATE IS YOUR USUAL PLACE OF RESIDENCE?

Q.25 WHICH AGE GROUP DO YOU BELONG IN?

GERMAN AND ENGLISH VERSIONS

OF THE OUTBOUND SURVEY QUESTIONNAIRE

1. WAR DIES IHR ERSTER BESUCH IN AUSTRALIEN
   JA.....1   NEIN.....2
   WENN NEIN,WIE OFT WAREN SIE SCHON IN AUSTRALIEN?
   ....

2. WIE VIELE TAGE HABEN SIE INSGESAMT IN AUSTRALIEN VERBRACHT?
   ....TAGE

3. UNGEFAEHR WIEVIELE TAGE HABEN SIE IN DEN VERSCHIEDENEN BUNDESSTAATEN VERBRACHT?
   BITTE TRAGEN SIE "0" EIN,WENN SIE KEINE TAGE IN DEM BETREFFENDEN BUNDESSTAAT VERBRACHT HABEN.

   NEW SOUTH WALES.............TAGE
   QUEENSLAND..................TAGE
   VICTORIA....................TAGE
   SOUTH AUSTRALIA.............TAGE
   TASMANIA....................TAGE
   WESTERN AUSTRALIA...........TAGE
   NORTHERN TERRITORY..........TAGE
   A.C.T.(CANBERRA)............TAGE

   <u>WENN SIE KEINE TAGE IN VICTORIA,TASMANIEN ODER SUED AUSTRALIA VERBRACHT HABEN,GEHEN SIE BITTE ZU FRAGE 16.</u>

4. WELCHE DER FOLGENDEN SEHENSWUERDIGKEITEN <u>IM SUEDLICHEN AUSTRALIEN (VICTORIA,TASMANIEN,SUED AUSTRALIEN) HABEN SIE BESUCHT?</u>

   BAROSSA VALLEY..................1
   PHILLIP ISLAND..................2
   FLINDERS RANGES.................3
   FRANKLIN/GORDON RIVER...........4
   GREAT OCEAN RD./12 APOSTEL......5
   CRADLE MOUNTAIN.................6
   SOVEREIGN HILL..................7
   CAPE SCHANCK COASTAL PARK.......8
   HAHNDORF........................9
   WILSONS PROMONTORY.............10
   BOTANISCHER GARTEN MELBOURNE...11

5. WELCHE SEHENSWUERDIGKEITEN (EINSCHLIESSLICH DER STAEDTE) HABEN SIE IM SUEDLICHEN AUSTRALIEN SONST NOCH BESUCHT?

39

6. HATTEN SIE VOR IHRER ANKUNFT IN AUSTRALIEN GENUEGEND INFORMATIONEN BEZUEGLICH DER SEHENSWUERDIGKEITEN IM SUEDLICHEN AUSTRALIEN?

JA......1 NEIN.....2 WEISS NICHT.....3

7. WAS WAREN IHRE HAUPINTERESSEN WAEHREND IHRES URLAUBS IM SUEDLICHEN AUSTRALIEN ?

FAULENZEN..1
NATURPARKS BESUCHEN..2
"SIGHTSEEING"..3
DAS LAND ERFORSCHEN..4
SCHWIMMEN IM OZEAN...5
EINKAUFEN GEHEN..6
GUT ESSEN GEHEN..7
PHOTOGRAPHIEREN..8
KULTURELLE VERANSTALTUNGEN BESUCHEN..........................9
MUSEEN/KUNSTAUSSTELLUNGEN BESUCHEN...........................10
SPORT TREIBEN...11
SONSTIGE INTERESSEN:____________________________________

____

____

____

8. HAT DAS SUEDLICHE AUSTRALIEN IHREN VORSTELLUNGEN ENTSPROCHEN?
JA.....1 NEIN.....2

9. WENN NEIN IN FRAGE 8, WOVON WAREN SIE IM SUEDLICHEN AUSTRALIEN ENTAEUSCHT?

WETTER...1
BEVOELKERUNG...2
ZU EUROPAEISCH...3
LANDSCHAFTLICH UNINTERESSANT.................................4
ZU DICHT BESIEDELT...5
EINKAUFSMOEGLICHKEITEN.......................................6

SONSTIGES:____

____

____

____

10. WENN JA IN FRAGE 8, WAS HAT SIE IM SUEDLICHEN AUSTRALIEN BESONDERS BEEINDRUCKT?

NATURPARKS..1
FREUNDLICHE BEVOELKERUNG..........................2
KULTUR IN DEN STAEDTEN............................3
STRAENDE UND DER OZEAN............................4
WEINANBAU GEBIETE.................................5
"OUTBACK"...6
EINZIGARTIGE TIERWELT.............................7
SONSTIGES: ____

____

____

____

11. INSGESAMT WUERDEN SIE SAGEN IHR AUFENTHALT IM SUEDLICHEN AUSTRALIEN(VICTORIA,TASMANIEN,SOUTH AUSTRALIA) WAR:

VIEL SCHLECHTER ALS ERWARTET......................1
SCHLECHTER ALS ERWARTET...........................2
WIE ERWARTET......................................3
BESSER ALS ERWARTET...............................4
VIEL BESSER ALS ERWARTET..........................5

12. WELCHES VERKEHRSMITTEL HABEN SIE WAEHREND IHRES SUED AUSTRALIEN URLAUBS HAUPTSAECHLICH BENUTZT?

MIETWAGEN...................1
CAMPERVAN...................2
BUS.........................3
BAHN........................4
FLUGZEUG....................5
WELCHES VERKEHRSMITTEL HABEN SIE SONST NOCH BENUTZT?

....

13. UNGEFAEHR WIEVIELE AUSTRALISCHE DOLLARS HABEN SIE PRO PERSON PRO TAG IM SUEDLICHEN AUSTRALIEN AUSGEGEBEN? (EINSCHLIESSLICH UNTERKUNFT,VERPFLEGUNG,TRANSPORT UND KLEINERER EXTRAS)

$ 30 - $ 50....1
$101 - $150....3
$201 - $250....5
$301 - $350....7

$ 51 - 100....2
$151 - 200....4
$251 - 300....6
UEBER $350....8

14. WELCHE FORM VON UNTERKUNFT HABEN SIE WAEHREND IHRES AUFENTHALTS IM SUEDLICHEN AUSTRALIEN HAUPTSAECHLICH BENUTZT?

WOHNUNGEN VON FREUNDEN UND VERWANDTEN..............1
HOTELS DER GEHOBENEN KLASSE (4-5 STERNE)...........2
HOTELS DER MITTLEREN KLASSE (2-3 STERNE)...........3
BUDGET HOTELS......................................4
MOTELS...5
APPARTMENTS..6
HERBERGEN FUER RUCKSACKREISENDE.....................7
JUGENDHERBERGEN.....................................8
CARAVANPARKS/ZELTPLAETZE............................9
DRAUSSEN GESCHLAFEN/FREI ZELTEN....................10
ANDERE UNTERKUNFT: ____________________

____

____

15. WELCHE ANREGUNGEN KOENNTEN SIE DEN FREMDENVERKEHRSPLANERN IM SUEDLICHEN AUSTRALIEN GEBEN DIE ES DIESEN ERMOEGLICHEN WUERDEN IHREN NAECHSTEN AUFENTHALT IM SUEDLICHEN AUSTRALIEN NOCH ANGENEHMER ZU GESTALTEN?

____

____

____

____

16. BITTE BEANTWORTEN SIE DIESE FRAGE NUR WENN SIE DAS SUEDLICHE AUSTRALIEN NICHT BESUCHT HABEN.

WAS SIND DIE HAUPTGRUENDE WARUM SIE DAS SUEDLICHE AUSTRALIEN NICHT BESUCHT HABEN?

NICHT GENUEGEND INFORMATIONEN.......................1
ZU EUROPAEISCH......................................2
LANDSCHAFTLICH NICHT WAS ICH SEHEN WILL.............3
WETTER BEDINGUNGEN..................................4
NICHT GENUEGEND ZEIT................................5
SONSTIGE GRUENDE: ____________________

____

____

____

V I E L E N   D A N K !

TRANSLATION OF THE OUTBOUND QUESTIONNAIRE FOR THE GERMAN SPEAKING VISITORS SURVEY.
THOMAS G. BAUER, FOOTSCRAY INSTITUTE OF TECHNOLOGY

Q.1 WAS THIS YOUR FIRST VISIT TO AUSTRALIA?

Q.2 HOW MANY DAYS DID YOU STAY IN AUSTRALIA?

Q.3 APPROXIMATELY HOW MANY DAYS DID YOU STAY IN THE VARIOUS STATES?
IF YOU DID NOT STAY IN THE SOUTHERN STATES AT ALL, PLEASE GO TO QUESTION 16.

Q.4 WHICH OF THE FOLLOWING TOURIST ATTRACTIONS IN SOUTHERN AUSTRALIA DID YOU VISIT DURING YOUR STAY?

BAROSSA VALLEY PHILLIP ISLAND FLINDERS RANGES
FRANKLIN/GORDON GRAET OCEAN ROAD/12 APOSTLES
CRADLE MOUNTAIN SOVEREIGN HILL HAHNDORF
CAPE SCHANCK COASTAL PARK WILSONS PROMONTORY
BOTANICAL GARDENS IN MELBOUNRE

Q.5 WHICH OTHER ATTRACTIONS DID YOU VISIT DURING YOUR STAY IN SOUTHERN AUSTRALIA?

Q.6 DID YOU HAVE ENOUGH INFORMATION ON SOUTHERN AUSTRLAIA PRIOR TO YOUR DEPARTURE?

Q.7 WHAT WERE YOUR MAIN INTRERSTS DURING YOUR SOUTHERN AUSTRALIAN HOLIDAY?

DO NOTHING VISIT NATIONAL PARKS SIGHTSEEING
EXPLORE THE COUNTRY SWIM IN THE OCEAN SPORT
SHOPPING DINING OUT MUSEUMS/ART GALLERIES
ATTEND CULTURAL EVENTS
OTHER INTERESTS

Q.8 DID SOUTHERN AUSTRALIA FULFIL YOUR EXPECTATIONS?

Q.9 IF NO IN Q.8 WHAT DISAPPOINTED YOU?

CLIMATE
POPULATION
TOO EUROPEAN
UNINTERESTING SCENERY
TOO DENSLY POPULATED
LACK OF SHOPPING OPPORTUNITIES
OTHER

Q.10 IF YES IN Q. 8 WHAT IMPRESSED YOU MOST IN SOUTHERN AUSTRALIA?

NATIONAL PARKS FRIENDLY POPULATION
CULTURE IN THE CITIES BEACHES AND THE OCEAN
WINE GROWING REGIONS OUTBACK UNIQUE FAUNA
OTHER

Q.11 ALL OR WHOLE, YOU SAY YOUR STAY IN SOUTHERN AUSTRALIA WAS

MUCH WORSE THAN EXPECTED
WORSE THAN EXPECTED
AS EXPECTED
BETTER THAN EXPECTED
MUCH BETTER THAN EXPECTED

Q.12 WHICH MODE OF TRANSPORT DID YOU MAINLY USE DURING YOUR STAY IN SOUTHERN AUSTRALIA?

RENT A CAR   CAMPERVAN   COACH   TRAIN   PLANE

WHICH OTHER MODE OF TRANSPORT DID YOU USE?

Q.13 HOW MANY AUSTRALIAN DOLLARS DID YOU SPENT PER PERSON/DAY (INCLUDING ACCOMMODATION,MEALS,TRANSPORT AND SMALLER EXTRAS)?

Q.14 WHICH ACCOMMODATION DID YOU MAINLY USE DURING YOUR STAY IN SOUTHERN AUSTRALIA?

HOMES OF FRIENDS/RELATIVES   4 OR 5 STAR HOTELS
2 OR 3 STAR HOTELS   BUDGET HOTELS   MOTELS
BACKPACKERS HOSTELS   YOUTH HOSTELS   APARTMENTS
CARAVAN PARKS/CAMP GROUNDS   SLEPT OUTSIDE   OTHER

Q.15 WHICH SUGGESTIONS COULD YOU GIVE THE TOURISM PLANNERS OF SOUTHERN AUSTRALIA THAT WOULD ENABLE THEM TO MAKE YOUR NEXT VISIT EVEN MORE ENJOYABLE?

Q.16 PLEASE ANSWER ONLY IF YOU DID NOT VISIT SOUTHERN AUSTRALIA. WHAT ARE THE MAIN REASONS WHY YOU DID NOT VISIT SOUTHERN AUSTRALIA?

NOT ENOUGH INFORMATION   TOO EUROPEAN   UNINTERESTING SCENERY
CLIMATE   NOT ENOUGH TIME   DOES NOT OFFER WHAT I WANTED
OTHER REASONS

Q.13. WHICH MODE OF TRANSPORT WILL YOU USE FOR THE LONGEST TRIP DURING YOUR STAY IN SOUTHERN AUSTRALIA.

RENT A CAR
CAMPERVAN
COACH
TRAIN
PLANE
OTHER

Q.14. WHICH OTHER MODE OF TRANSPORT DO YOU INTEND TO USE DURING YOUR STAY IN SOUTHERN AUSTRALIA?
PLEASE SPECIFY.

Q.15. WHICH ACCOMMODATION WILL YOU MAINLY USE DURING YOUR STAY IN SOUTHERN AUSTRALIA?

FRIENDS/RELATIVES
FOUR TO FIVE STAR HOTELS
TWO TO THREE STAR HOTELS
BUDGET HOTELS
BACKPACKERS HOSTELS
YOUTH HOSTELS
MOTELS
APARTMENTS
CARAVAN PARKS/CAMPGROUNDS
SLEEP OUTSIDE
OTHER ACCOMMODATION

Q.16. WHICH PART OF YOUR STAY IN AUSTRALIA HAVE YOU PRE-BOOKED?

TOTAL STAY
ONLY THE FLIGHT
THE FLIGHT AND A FEW NIGHTS ACCOMMODATION
THE FLIGHT AND A RENTAL CAR
THE FLIGHT AND A CAMPERVAN
NONE

Q.17. HOW MANY PEOPLE ARE YOU TRAVELLING WITH?

ALONE
WITH MY PARTNER
WITH MY PARTNER PLUS CHILDREN
IN A GROUP WITH... PEOPLE

Q.18. FROM WHICH AUSTRALIAN AIRPORT WILL YOU DEPART ?

MELBOURNE
SYDNEY
BRISBANE
CAIRNS
PERTH
ADELAIDE
DARWIN
TOWNSVILLE

BIBLIOGRAPHY

Australian Government Publishing Service, Style Manual For Authors, Editors And Printers, Fourth Edition, Canberra 1988

Australian Tourist Commission, Europe Market Brief, London 1990.

________. Corporate Plan 1989/90 -1993/94. Sydney 1989.

________. Corporate Plan 1990/91 -1994/95. Sydney 1990.

________. Australia-A Traveller's Guide, 14th edition, Sydney 1990.

________. Holiday Market Report West Germany, Melbourne Sept. 1981.

Belson, W.A., Validity in Survey Research, Gower Publishing Company, Hants, England 1986.

Bleile, G., Zukunftstrends der touristischen Nachfrage in der Bundesrepublik Deutschland in Revue de Tourisme, Vol.43 (3), 1988.

Bureau of Tourism Research, International Visitor Survey. Canberra 1989

________. International Visitors Survey 1989 -Preliminary Results. Canberra 1990.

Calantone,R.J ,Di Benedetto,C.A.,Hakim,A.,Bojanic,D.C.Multiple Multinational Tourism Positioning Using Correspondence Analysis,Journal of Travel Research,Fall 1989.

Card,J.A.,Kestel,C.,Motivational Factors and Demographic Characteristics of Travelers to and from Germany, Loisir et Societe/Society and Leisure,Volume 11,numero 1,printemps 1988,Presses de l'Universitedu Quebec.

Cockerell,N.,West Germany outbound-A study of West Germans travelling abroad in Travel & Tourism Analyst,The Economist Publications Limited, 1986.

________. Hey big spenders! PATA Travel News,February 1989.

________. Been there,done that.PATA Travel News,February 1989.

Dybka,J.,Overseas Travel To Canada:New Research On The Perceptions And Preferences Of The Pleasure Travel Market, Journal of Travel Research, Spring 1988 p.12-15.

Hahn,H.,and Schramm E.,Welches Image haben Asien und der Pazifikraum bei deutschen Reisenden? Fremdenverkehrswirtschaft International,Nr.3.,1988 pg.8 .

Hakins,C. and Sorgi,M., Research,how to plan,speak and write about it.Springer Verlag Berlin Heidelberg 1985.

Howard,K.,and Sharp,JA.,The Management of a student research project.

Hoon,Y.S.,Stirrings,as West meets East,PATA Travel News,May 1990.

Hunt,J.D.,Image as a Factor in Tourism Development.Journal of Tourism Research 1975.

Kale,H.S.,Weir ,K.M.,Marketing Third World Countries to the Western Traveler:The Case of India.Journal of Travel Research Fall 1986.

King,B.,Hyde,G.,Tourism Marketing in Australia,Hospitality Press,Melbourne 1989

Kress,G.,Marketing Research,third edition,Prentice Hall,Englewood Cliffs,N.J. USA.

Lohman,M.,v.Lassberg,D. (ed.),Tourism in Europe,Studienkreis fuer Tourismus E.V., Starnberg 1989.

Mc Lellan,R. W.,Foushee,K.D.,Negative images of the United States as expressed by tour operators from other countries.-Journal of Travel Research, Summer 1983.

Mundt,J.,Urlaubsreisen 1988,Einige Ergebnisse der Reiseanalyse 1988, Studienkreis fuer Tourismus,Starnberg 1989.

PATA Travel News,Germans,they are a-changing, October 1989.

Pacific Asia Travel Association,Segmentation Study of Potential Holiday Travellers from Germany to the Pacific/Asia Area.San Francisco, undated.

Phelps,A.,Holiday destination image-the problem of assessment.Tourism Management,September 1986.

Ritchie,J.R. and Goeldner C.R.,Travel,Tourism,and Hospitality Research,John Wiley&Sons New York 1987.

Silverman,D.,Qualitative Methodology & Sociology,Gower Publishing Company, Hants,England 1985.

South Australian Department of Tourism,Tourism in South Australia.A summary of the South Australian Tourism Plan 1987-1989,Adelaide 1987.

Teye,V.B.,Marketing An Emerging International Tourist Destination:The Case of Arizona.Journal of Travel Research Spring 1989.

Turabin,K.L,A Manual for Writers,Fifth Edition,University of Chicago Press,
Chicago 1987.

Tourism Canada under authority of the Department of Regional Industrial Expansion, Pleasure Travel Markets to North America: Japan, United Kingdom, West Germany, France, June 1987.

Victorian Tourism Commission, Trends in international visitors to Victoria 1984 to 1988. Victorian Tourism Commission, Melbourne 1989.

Williams, A.M., Shaw, G., Tourism and Economic Development-Western European Experiences, Belhaven Press, London, 1989.

World Tourism Organisation, Current Tourism Indicators, Madrid 1990.