

Green Season Research

Alpine Resorts Co-Ordinating Council

Full qualitative research report

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Project no. 26266

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6 April 2017

Alpine Resorts Co-Ordinating Council
Attention: Ian Swan and Lorena Gibson
Level 2, 8 Nicholson Street, East Melbourne VIC 3002

GREEN SEASON RESEARCH

Dear Ian and Lorena,

Enclosed is the draft full qualitative report for both phases of the Green Season research project.

This report has been prepared in accordance with terms and conditions found in the contract dated 5 September 2016.

Please contact Belinda Rogerson if you have any questions regarding this report.

We look forward to discussing this report with you in due course.

Yours sincerely

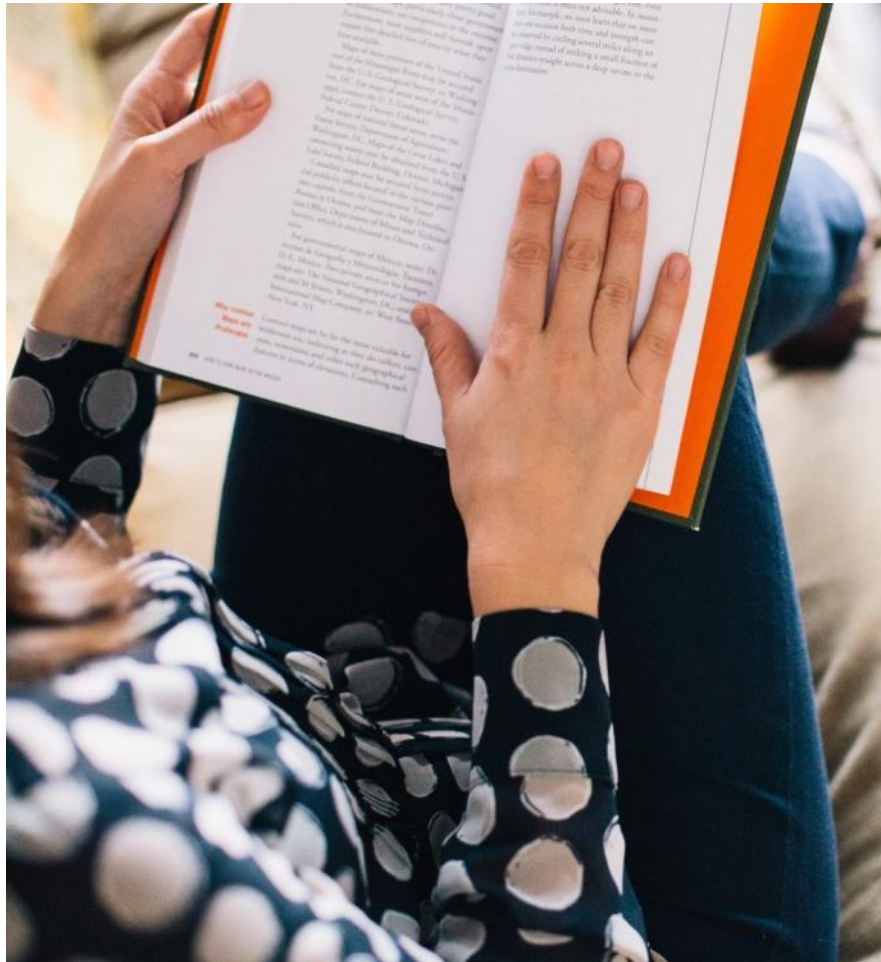


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EY Sweeney is accredited under the International Standard, ISO 20252.

All aspects of this study were completed in accordance with the requirements of that scheme.

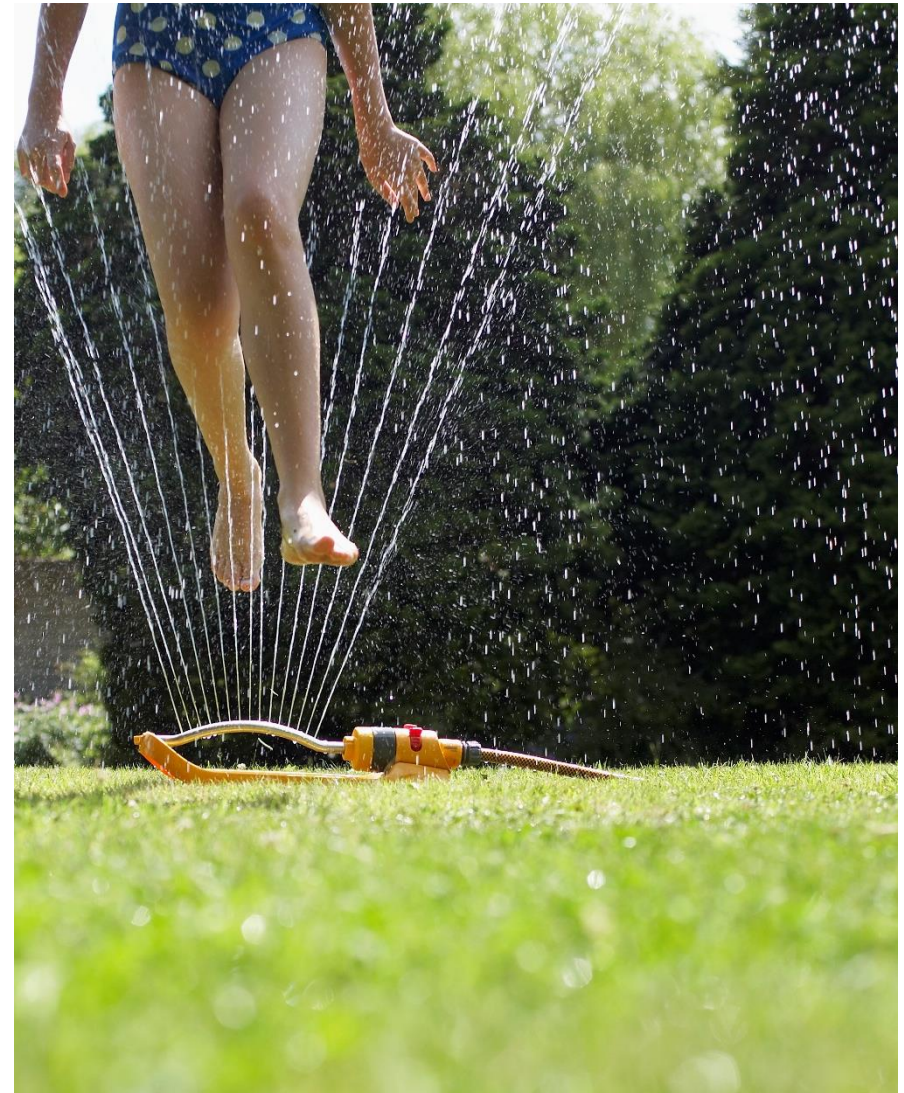
Also please note that EY Sweeney's liability is limited by a scheme approved under professional standards legislation. A copy of the scheme can be obtained from us upon request.



Background

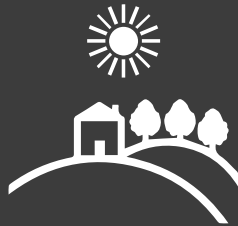
Background

- ▶ Alpine Resorts Coordinating Council (ARCC) is a statutory body of the Victorian Government. Among many mandates, ARCC is tasked with implementing strategic plans across Victoria's alpine resorts, promoting Victoria's Alpine Region, attract investment into the region, and conducting research into alpine resort issues.
- ▶ ARCC undertakes a significant amount of research into winter season, the traditional time of year when visitation and expenditure to the region are at their peak. Through research conducted by EY Sweeney, the potential opportunity for a "Green Season" offering during spring and summer has arisen. A "Green Season" offering would address the need to adapt to a changing climate and changing tourism visitation and consumer behaviours more generally, as well as provide a diversified income stream for the alpine resorts.
- ▶ In order to further develop the potential "Green Season" offering, ARCC commissioned this study to provide a solid evidence base regarding the composition and behaviours of current and potential Green Season visitors.
- ▶ ARCC and the alpine resorts require this research to provide sufficient evidence for strategic operation and infrastructure decisions, particularly in regards to expanding into a broader 12 month offering. Currently the limited "Green Season" offering is ad hoc and disjointed across resorts and relates to trail and mountain biking, running, 4WDing, and other sporting and recreational events.



Research objectives

Overall aim



To understand and articulate the motivations and barriers for “Green Season” engagement and help develop a value proposition that may increase Victorian alpine visitation during spring, summer, and autumn months.

Understand the context



- ▶ What **activities** are sought during spring, summer, and autumn that might align to alpine resort capabilities?
- ▶ What are the **pain points** and **ignition points** around spring/summer holiday experiences?
- ▶ What is the level of **awareness** and **appeal** of existing “Green Season” offerings and products in the Victorian Alpine Region?

Explore the potential



- ▶ How **appealing** is a “Green Season” experience?
- ▶ What **factors** contribute to this appeal (including tangible and intangible factors)?
- ▶ What are the **barriers** to consideration and engagement?

Develop a proposition



- ▶ What **expectations** would potential visitors have around a “Green Season” experience?
- ▶ What **features, facilities, and experiences** would they expect and/or prefer?
- ▶ What **types** of customers would be most interested in a “Green Season” experience?
- ▶ What is the best **way to engage** potential audiences with a “Green Season” proposition?

The research approach

1. Orientation



- ▶ Orientation session to refine and finalise the methodology
- ▶ **Two hour orientation session**
- ▶ Discussion of objectives, methodology, logistics, timing, and deliverables
- ▶ Attendance by range of stakeholders including government, ARMBs

2. Group discussions



- ▶ Five groups conducted in Melbourne in late 2016
- ▶ Focus groups to explore the appeal, expectations, drivers, and barriers of visitation to the region in spring/summer/autumn
- ▶ Three key audiences (non-visitors, visitors during White Season, visitors during Green Season)

3. Interim analysis and reporting



- ▶ Interim report focussing on emerging insights, potential opportunities and "quick wins" for the upcoming Green Season

4. In-depth interviews



- ▶ In-depth interviews to explore drivers and barriers of visitation, needs, behaviours, preferences, ways to increase appeal and visitation to the region in spring/summer/autumn
- ▶ Ten interviews held in Melbourne with recent visitors to the region in Green Season 2016-17

5. Analysis and reporting



- ▶ Detailed report bringing together all stages of the study
- ▶ Presentation of results to ARCC team and stakeholders

Methodology: Qualitative focus groups

- ▶ A series of five focus groups were conducted in Melbourne, over the period 28 November to 1 December.
- ▶ Quotas were employed to ensure adequate coverage of specific subgroups (across a range of visitor types) to be reflective of the market scope and ensure that specific subgroups were included. The final achieved focus group structure is shown opposite.
- ▶ Each session lasted approximately 90 minutes in duration and involved 5-8 research participants. Each respondent was provided with a cash incentive of \$80 for taking part.
- ▶ Exploratory in nature, the objective of this specific stage of the research was to take a holistic exploration of the topic, including...
 - Discussions of current spring/summer holiday experiences and drivers thereof
 - Projective techniques to better understand ideal holiday experiences from an emotional and functional perspective
 - Brand transference activities to flesh out potential proof points for a 'Green Season' experience
 - Understanding of appropriate messaging and channels for communicating compelling calls to action.



Group discussions	
Group	Specifications
1	Never been to Victorian Alpine Region but would consider visiting
2	Never been to Victorian Alpine Region but would consider visiting
3	Visited Victorian Alpine Region during White Season 2016
4	Visited Victorian Alpine Region during White Season 2016
5	Visited Victorian Alpine Region during Green Season previously
Other specifications	
▶ Exclude current or former employees of ARCC or alpine resorts	
▶ Mix of genders and life stages	

Methodology: post-Green Season depth interviews

- ▶ A series of 10 one-on-one in-depth interviews were conducted in Melbourne or over the phone over the period 10th-20th March 2017.
- ▶ Participants in the depth interviews had all visited the Victorian Alpine Region during Green Season 2016-17. All had completed a survey while visiting the region as part of another project to determine the economic significance of the region. As part of that survey, respondents were asked whether they were interested in participating in further follow-up research. Those who said yes were contacted and invited to participate in this study.
- ▶ Each interview lasted approximately 60 minutes in duration. Each respondent was provided with a cash incentive of \$80 for taking part.
- ▶ The purpose of these interviews was to explore drivers and barriers of visitation, needs, behaviours, preferences, ways to increase appeal and visitation to the region in spring/summer/autumn, including...
 - Awareness of products, facilities, and experiences available in Green Season
 - Logistics of recent visit
 - Drivers of visitation
 - Likes/dislikes of recent visit
 - Suggested improvements
 - Needs of holidays in spring/summer in general and needs of holidays in the Alpine Region, including extent to which current offering meets those needs
 - Ways to increase appeal and visitation during Green Season.



Depth interviews

Specifications

- ▶ Have visited Victoria's Alpine Region during the 2016-17 Green Season (defined as the period between Melbourne Cup weekend 2016 and ANZAC weekend 2017)
- ▶ Decision-maker in regards to how they/their family spend their leisure time
- ▶ Come from a mix of genders and life stages, and a mix of visitors to key resorts (e.g. Mt Buller, Mt Hotham, Falls Creek, Lake Mountain, Mt Baw Baw)



The detailed findings

Constraint

Focus group discussions/depth interviews evolve creative ideas and generate hypotheses. They are not intended to be a precise and definitive index of what happens in the marketplace. This report should be interpreted with that constraint in mind.

Understanding the context



Underlying needs of a getaway or holiday

► Common underlying needs of a getaway or holiday in general include...

Antidote to stress	► Rest, relaxation, and rejuvenation - to return home ready for the demands of day to day life again	Worth the money	► Travelling can be expensive, so the benefits of the trip must outweigh the cost
Keeping all travellers happy	► Can be difficult to achieve, but it is critical that all parties enjoy themselves	Safety	► Feeling safe is key to being able to relax and enjoy the time away
Breaking the routine	► Enjoyment of choosing how to spend time, sleeping in, staying up late etc.	Freedom / lack of responsibility	► Freedom to spend time as you please, without demands of work or other commitments
Worth the time	► Annual leave and time off work are precious, so time away must be spent carefully	Tech detox	► Not feeling pressured to be switched on and responsive all the time

"I want to be relaxed. I want to be stress free. I just throw the phone away...I just want to go to a café or bar or go for a drive down wherever and see a sight that's also relaxing..." -Never visited Alpine Region

"I feel like I don't have any responsibility...it's like I don't care what time I sleep, what time I'm eating, it's just empty head...I suppose I'm not in my usual routine. Whatever the day will bring, I'll follow it." -Visited Alpine Region in winter 2016

The Victorian Alpine Region can easily meet all of these underlying needs, however so can most getaway/holiday destinations. Consider how the region can uniquely meet these needs when developing key messages.

Key constraints for getaways or holidays

- Five factors play a major role in influencing getaways or holidays...

Time	<ul style="list-style-type: none">► Determines how far away people can travel► Shorter holiday means they won't travel very far – too much of the holiday time is eaten up in travel
Budget	<ul style="list-style-type: none">► A major constraint, influences all aspects of the holiday including destination, duration, activities, accommodation, travel companions, etc.
Weather	<ul style="list-style-type: none">► Often a specific season / temperature is desired, e.g. a warm holiday in the middle of winter, avoiding extreme heat or humidity in summer
Companions	<ul style="list-style-type: none">► Ensuring that all travellers are happy is a critical need. Children require fun activities, older travellers might have accessibility requirements
Purpose	<ul style="list-style-type: none">► For example, a Buck's party would constrain the holiday in different ways than a family reunion► Influences all decisions related to the holiday

"All of my brothers and I could spend a whole month overseas. With my schoolmates, it would only be a couple days. It depends on the cost and where they want to go. Everyone has different situations, availability, and everyone can afford certain things and stuff like that." -Never visited Alpine Region

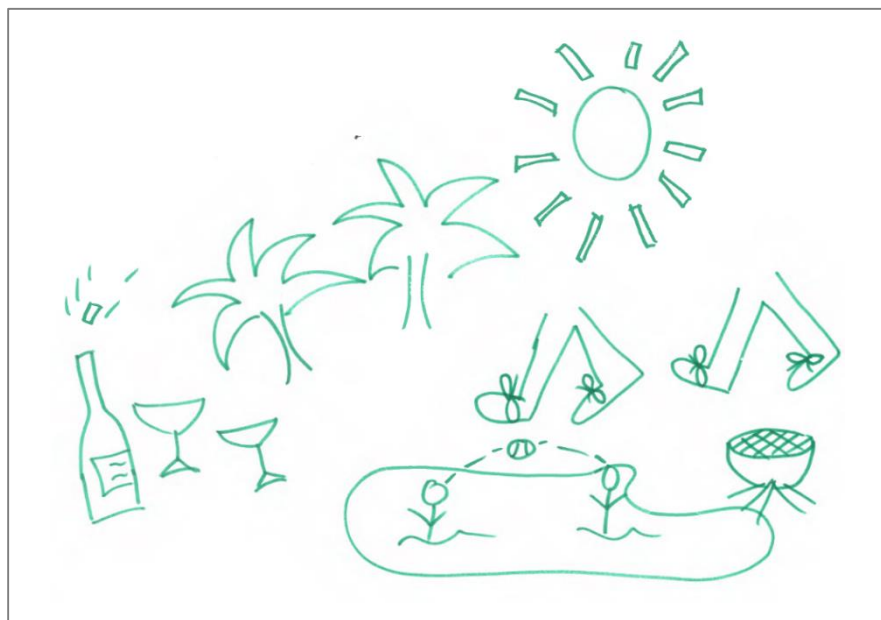


"I think for me, it's more the agenda. If you're going with your family, it's a certain different agenda as opposed to going with friends. The purpose of the holiday might be a bit different as well." -Visited Alpine Region in winter 2016

Holidays to the Victorian Alpine Region in Green Season can definitely fit within these constraints, and some aspects of the region (such as moderately warm weather in summer, close proximity to Melbourne, lower cost than in White Season) can be key selling factors.

Ideal holidays in spring, summer, autumn

- Common top of mind associations with ideal holidays at this time of year are sunshine, warm weather, water (beach or pool), and drinks (cocktails, wine, beer). Ideal holidays are focussed less on highly active activities. A premium is placed on relaxation rather than expending large amounts of energy or effort



Pictures by focus group participants when asked to draw what first comes to mind when thinking about their ideal getaway/holiday during spring, summer, autumn

"Beach, cocktails and reading. Just laying on the beach. I'm pretty much a warm person mostly as well, nearly always go to the beach as well." -Visited Alpine Region in Green Season previously

"A pool, and a beach and luxury accommodation. Good food, sun, sand, surf." -Never visited Alpine Region

A key challenge for the Victorian Alpine Region is the assumption that an ideal holiday at this time of year must include beach. Consider promoting other ways visitors can enjoy water (e.g. pools, rivers). In addition, more moderate temperatures at higher altitudes minimise the requirement for water-based activities, which is a key message to help challenge this assumption.

Popular activities in spring, summer, autumn

► During the warmer months, popular activities are generally similar to those sought in winter, with a bit more emphasis on outdoor activities...

Outdoor

- Beach, pool, bicycling, hiking, river rafting, motorcycle rides

Relaxation

- Reading, spa treatments, board games, card games

Cultural

- Experience local culture, cooking classes, historical or educational activities

Nature

- Camping, watching sunsets, taking in scenery, nature walks

Food and wine

- Wineries, drinking cocktails, long lunches, BBQ's

Exploration

- Day trips, exploring the countryside, taking photos

Family-friendly

- Activities for kids, theme parks

Other

- Shopping, markets, nightlife, visiting friends or relatives

"I love exploring but I also need a bit of relaxation so we might do some trekking but then I want to have a couple of days...on the beach or a spa. Even if we go away for the weekend, we might spend a lot of time walking and running but I'd also want to have a retreat in the spa." -Visited Alpine Region in winter 2016

"I think it's more comfortable during these three seasons. When you're going out, you don't stress so much about the cold or bringing extra luggage." -Visited Alpine Region in winter 2016

Major attributes of a spring/summer/autumn getaway or holiday revolve around beaches, nature and good weather. It is vital to be outside and 'with nature' during this time of year because during winter and when at work there is a greater tendency to spend time indoors.

Drivers and barriers of destinations for spring/summer/autumn getaways

► Destinations for getaways or holidays during spring/summer/autumn are more appealing or less appealing based on the following factors...

Drivers of choosing destination

- ✓ **Affordable** (transport, accommodation, food, activities)
- ✓ **Warm** weather (but not too warm or humid)
- ✓ Opportunities to relax and recharge, but sufficient low energy activities to keep travellers entertained
- ✓ **All inclusive** packages (such as cruises or tour groups)
- ✓ Opportunities to explore **wildlife, nature**, local flora/fauna
- ✓ **Open spaces**, with fewer people (no crowds)
- ✓ For families: **kid-friendly** activities

Barriers to choosing destination

- ✗ **Not enough** activities or things to do - too much quiet time can quickly lead to boredom, especially for children
- ✗ Weather is **too hot** or humid - can easily become uncomfortable and make spending time outdoors undesirable
- ✗ **Lack of nightlife** - a particular barrier for younger people

Holidays at this time of year need to be easy, invigorating, driven by connection to family or friends, connected to nature, and relaxing without being dull.

"Cruises are pretty good. Food, accommodation, everything in one. They're amazing. With kids too, like 1,500 bucks for 12 nights and then everything's paid. And if you're lucky they'll throw in a drinks package and then you're just off with the fairies." -Visited Alpine Region in Green Season previously

"It's too hot sometimes. Even if it might not be a bush area, it's still too hot sometimes if you go in January and you get 40 degree days. It makes it less fun. It's too hot to go out." -Never visited Alpine Region

The Victorian Alpine Region has an offering which aligns to all of the major drivers of choosing a destination and can avoid the barriers. These are key areas to focus on in communications about the region's offering.

Perceptions of Green Season (for non-visitors)



Initial reactions to Green Season - those who have not visited the region

Initial reactions include...

- ▶ **Low awareness and understanding...** A Green Season getaway was not top of mind for this cohort, with the vast majority expressing uncertainty to what this would type of getaway it would be. They can't immediately conceptualise themselves enjoying this type of getaway
- ▶ **Preliminary interest...** Despite low awareness, there was interest in learning what was available in the region and resorts during 'off-season'
- ▶ **Made for the outdoorsman...** Preliminary perceptions of natural landscapes and limited technology connectivity led this cohort to imagine that it was a fitting getaway for those who love the outdoors and relaxing
- ▶ **Uncertainty...** While showing some initial interest, many were hesitant to fully consider a Green Season getaway before knowing much more about what was on offer

With holidays being a large expense and time away being a precious use of time, it is critical to help this audience understand and visualise how they could enjoy the region.

Defining a Green Season getaway

Many believed a trip to the Victorian Alpine Region or resorts during Green Season would be a short unplanned getaway rather than what is considered a 'holiday'. The Green Season offering is more closely aligned with long weekends and impromptu trips rather than traditional summer holidays that are planned for in advance and looked forward to throughout the year.



Although awareness of a 'Green Season' getaway was low, interest was expressed with many non-visitors showing motivation to learn more. Additionally, the Green Season offering was considered to be suited for a short term getaway rather than a 'summer holiday'.

Initial reactions to Green Season - those who have not visited the region

Some key concerns raised include...

- ▶ **What is there to do?** There was uncertainty around what offerings and activities would be available during non-snow season
- ▶ **Who would you go with?** There were mixed views on who this cohort would take to the region during this time - family, friends or colleagues. This speaks to a perceived lack of personal relevancy
- ▶ **Which locations can you visit?** While all were aware of the Victorian Alpine Region as a whole, those who had not been before were unaware of which specific mountains/locations would be suitable to go to during this time
- ▶ **Is the weather nice?** Many believed it would be risky traveling 'for that long in a car' to experience bad weather
- ▶ **Is anything open?** Those who had been to the region before during White Season were more critical of the offering, as they believed the resorts were tailored to snow season, with most amenities closing down outside of winter
- ▶ **Why would you go when there is no snow?** As this region is primarily associated with the snow, many questioned why anyone would go to the region when they could not take part in snow-related activities
- ▶ **Isn't it boring?** There was a belief that a Green Season getaway would be boring, with minimal activities and entertainment available
- ▶ **Is it expensive?** Holidays to the snow are seen as one of the most expensive domestic holidays available, therefore, some believed visiting in the 'off-season' would accrue similar costs despite a reduced offering (primarily among those who had visited during snow season)



Focus group exercise: If a friend of yours told you they had just returned from a getaway in the Victorian Alpine Region during green season, what would you think?

In short, Green Season does not immediately communicate a strong value proposition to this audience primarily due to low understanding and engagement rather than dislike of the offer. Due to low awareness, concerns regarding basic getaway/holiday logistics such as available activities, weather conditions, and costs are raised.

People most interested in a Green Season experience

Only after prompting and further discussion do thoughts about who would enjoy this getaway advance beyond simply people who enjoy camping. As awareness of activities and amenities on offer in the region increases, the perception of who would enjoy this getaway also broadens to include more types of people.



Expectations of Green Season - those who have not visited the region

Natural and beautiful

- ▶ Natural landscapes and beautiful scenery were the most prominent features of a Green Season getaway
- ▶ Elements of land, water, and air were the foundation of a Green Season getaway

"It would be beautiful, with waterfalls, wild flowers and fresh air."

Cheap alternative

- ▶ Considered to be a cheaper alternative to the 'traditional holidays' due to close proximity to Melbourne and lack of extravagant amenities
- ▶ By driving, visitors not only avoid the stress of airports but also save on travel

"I think this would be a good cheaper holiday."

Quiet and relaxing

- ▶ The location, type of activities, and spirit of a Green Season getaway are considered to be tailored towards relaxation and quiet time

"The journey, the quiet and the relaxation would be lovely."

Camping and exploring

- ▶ Activities such as walking, hiking and exploring were associated to a Green Season getaway
- ▶ This cohort believed the area would be relatively untouched, with camping being the main form of accommodation

"I would definitely go to this place to explore."

Boring

- ▶ Some were so unaware of the region that they struggled to think of what it could offer to visitors
- ▶ Those who were not interested in natural attractions did not find the Green Season offering appealing

"I think it could be boring, what is there to do?"

Weather

- ▶ A Green Season getaway is seen to be very reliant on good weather
- ▶ Concern that if the weather was not suitable (too hot or too cold) you would be stuck there with nothing to do


"If the weather wasn't good I would have no idea what to do there?"

Those who have not visited the region in the past perceive a Green Season getaway as a cheaper alternative to a 'traditional summer holiday', for relaxation and getting in touch with nature though this is not enough to engage them. Their expectations do not connect with what they are looking for in a getaway at this time of year, highlighting that the story needs to change.

Barriers to visiting the region during Green Season

Barriers to visiting

- ✗ Strong lack of awareness of what it's like at this time of year
 - **No accommodation:** camping is the only option (and this is not for everyone)
 - **No food/beverage:** visitors would have to bring their own supplies
 - **No activities:** people would be easily bored. A particular issue for families who need to ensure the kids are adequately entertained
 - Is the weather cooler than Melbourne - or too cool?
- ✗ Lack of knowledge leads to fear that a trip to the region would not be 'successful'
- ✗ Overall perception that the region does not offer a luxurious holiday experience (or even basic comforts)



"What do you do when there's no snow? Where do you stay? Is it busy? Expensive? Is it good for kids that time of year? Is it really hot? Are there rivers or lakes to swim in?"

-Visited Alpine Region in winter 2016

When prompted with the idea, a getaway/holiday to the region has strong appeal. Appeal is greater if promoted as 'trying something different to the usual holiday' with detailed information about activities, weather, and accommodation. Engagement won't happen without greater ability to visualise themselves there.

Perceptions of Green Season (for Green Season visitors)

Expectations of Green Season - those who have visited the region

Natural and beautiful

- ▶ The beautiful landscapes and natural attractions remain the key drivers to visitation
- ▶ The region is believed to offer fresh air, sunsets, and mountain views that cannot be offered by other Victorian locations

"You sit there and look at the most beautiful views and breath the freshest air."

Escape

- ▶ The location's proximity to Melbourne allows visitors to distance themselves from the 'concrete jungle'
- ▶ Parents look to take their children to locations that unplug their connection to and reliance on technology

"I want to get them away from all the iPads and video games...show them what else is there."

Silence

- ▶ Melbournians look to remove both the actual and metaphorical noise of living in the city and surrounding suburbs
- ▶ Visitors envisage a trip that allows them to sit peacefully and listen to the natural sounds of the land

"It is so nice and quiet."

Simplicity

- ▶ Visitors do not expect all the bells and whistles that come with a popular holiday destination, only expect the fundamental amenities for a holiday such as accommodation and food

"I go up to the mountain to ride and spend time with like minded people, that's it."

Weather

- ▶ There is an anticipation that the region will offer pleasant weather when visited (not too hot or cold)
- ▶ Many believe the weather is a key driver to visitation that the region cannot offer during other times of the year

"That's actually why I like to go in summer rather than snow season."

Roads, Tracks & Courses

- ▶ With the quantity of bike and hiking related events held in the region, visitors expect that there is high quality infrastructure to support the demand

"There are some of the best roads to climb (on a bike). That's why we keep coming back."

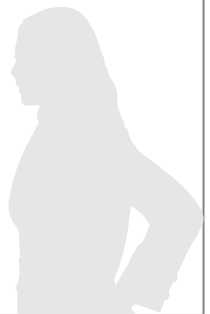
Those who have visited in the past during Green Season are aware of the region's simple offering at this time of year and therefore have expectations that are aligned with reality. Despite this, this reality is not aligned with the visitor's preferences, with many happy to spend more to receive a better offer (or stay longer).

Drivers to visiting the Victorian Alpine Region during Green Season

Drivers

- ✓ **Warmer...** Can enjoy the gorgeous scenery and fresh air without being so cold (as in winter)
- ✓ **Visually appealing...** Beautiful, nature-based getaway destination
- ✓ **Location...** Close proximity to Melbourne makes it particularly suited for a long weekend getaway (the holiday starts as you get in the car)
- ✓ **Escape...** Far enough away from Melbourne that visitors can experience a sense of disconnection or escape from their busy lives
- ✓ **Quiet...** Peaceful and quiet destination with distinct lack of crowds
- ✓ **Better weather...** More moderate temperatures provide opportunity to escape oppressive heat in other parts of the state
- ✓ **Inexpensive...** Cheaper to visit during off-season than in winter
- ✓ **Local hub...** Can anchor trip in Bright (hub of facilities and amenities) and spend days travelling into the mountains for self-sufficient activities such as hiking, nature walks, motorcycle riding
- ✓ **Novelty...** Idea of 'doing something different' is appealing
- ✓ **Physical terrain...** Has the required foundation to host large scale bike based events, including sealed roads, large climbs, and down hill mountain biking tracks
- ✓ **Active lifestyle...** Is the 'perfect' place to visit for health and fitness enthusiasts due to its abundance of exercise-related infrastructure
- ✓ **Variety...** Every mountain has a slightly different offering. You can return to the region multiple times and visit a new location each time, continuously experiencing something new
- ✓ **Likeminded peers...** When riders (and visitors alike) visit the region they enjoy the fact they are surrounded by likeminded people who they can meet and bond with

"I just thought, you know what, that's something different, let's do that. It was really really pretty. It was crisp. It's completely different to what I normally do because I'm always usually at the beach. But I did really like it, it's really lovely."



The region attracts visitors through its natural beauty and ability to disconnect from the city life. Those who have previously visited understand that the simplistic offering of the region is part of its appeal, however greater information about activities, weather, and accommodation would encourage more frequent and longer getaways.

Barriers to extending the Green Season offering

In general, people who visit the region for fitness-focussed activities are highly engaged and happy to stay as long as they can, as often as they can. The region caters well to this audience, who are happy with self-sufficient accommodation (i.e. camping) and food (i.e. bringing their own). The barriers to extending the visit largely apply to non-event goers.

Barriers to extending

- ✗ The limited accommodation and food/beverage offering restricts visitation from non fitness-focused travel parties to daytrips only
- ✗ Accommodation is perceived as either too expensive (hotel) or not comfortable enough (camping)
 - Event patrons and fitness-focussed travel parties are more content with camping on the mountain due to its proximity to the roads and tracks (and they will bring their own food)
- ✗ There are not enough food and beverage offerings to encourage people to stay longer
 - This leads to many travel parties choosing to stay in the creature comforts of surrounding towns (i.e. Bright)
- ✗ Overall perception that the region does not offer a luxurious or even a comfortable holiday experience, and there aren't enough activities to keep visitors entertained beyond a simple daytrip to one of the resorts

"I loved the holiday. My family and I had an amazing time but I don't think I could camp much longer than that long weekend."

-Visited Alpine Region in summer 2017

"We got to this beautiful lookout and then we were looking for somewhere to eat. There was nowhere. There were about 40 bike riders nearby looking for somewhere to eat as well."

-Visited Alpine Region in summer 2017

Growing visitation in Green Season



Appeal of a Green Season getaway/holiday

- ▶ Appeal is higher among those who have been to the region during Green Season before, or never been to the region at all...

Low appeal

High appeal

Visited the region in White Season

- ▶ Existing knowledge of the region in White Season contributes to scepticism about the off-season offering and reluctance to visit. They perceive there wouldn't be much to offer in the 'off season'
- ▶ Believe that if facilities were open, they would be expensive (similar to winter). This is a considerable turn off, as most perceive nature-based getaways as cheaper alternatives to 'typical holidays'
- ▶ This is unsurprising given the (necessary) focus on snow sports in winter

"I don't think I would go during summer. I just think it's the heat. In summer where there's the coast, at least you've got the breeze. It can be very expensive if you're not willing to sleep in a sleeping bag."

-Visited Alpine Region in winter 2016

Never visited the region

- ▶ While not knowing much (if at all) about the Alpine Region, they remain interested in 'a different type of getaway' to the typical beach holiday (such as a getaway to the Victorian Alpine Region)
- ▶ Raising awareness and providing more information prevail as the key needs for this group

"I should do that too. It might be a great getaway, cool, relaxing. I wonder if that would be fun, wildflowers, clean air, no crowds. What would you do? Hike?"

-Never visited Alpine Region

Visited the region in Green Season

- ▶ Strong perceptions of the region as a great place to escape the hustle and bustle of the city, check out amazing scenery, breathe fresh country crisp air, and enjoy a slower pace
- ▶ Trips to the region would generally last 3-4 days with some willingness to extend to a full week, but not any longer as there 'isn't enough to do' to keep visitors entertained and 'nothing is open' so visitors have to camp and bring their own food, etc if staying on mountain

"It was a bit novel, because it was like, this is so strange that we're here and there's no snow. Because I've been there before when it had been snowing. We just did walking and all that kind of thing, and stayed in a chalet."

-Visited Alpine Region in Green Season previously

Despite greater knowledge of the region and resorts, those who have visited in White Season demonstrated a greater reluctance to visit during Green Season and expected the region's offering would be disappointing compared to the winter experience. This audience does not have strong positive expectations on how to engage with the region ('what's in it for me?') in Green Season.

Increasing appeal of a Green Season getaway/holiday for current visitors

- There are three main components that need to be considered to increase the appeal of the Victorian Alpine Region during Green Season...

Where to stay

Current state...

- Minimal accommodation offering on most mountains
- Belief that you either pay high rates for a hotel/chalet or you camp at the bottom of the mountain and surrounding towns
- Visitor planning relates only to accommodation and is relatively easy to navigate via google

Visitor preference...

- Event patrons generally elect to stay on the mountain due to its proximity to the event and the comfort of a hotel room
- Families and non-event visitors prefer to stay at the base of the mountain or in surrounding towns as there is more on offer regarding accommodation choices and activities

First move...

Tailor an accommodation offering to event patrons, including multi-venue deals for those taking part in a number of events

What to eat and drink

Current state...

- Very limited offering available
- Perception that most outlets offer cheap products; most bring their own food with this perception in mind
- Many will visit surrounding towns if they want to go out for a meal, only purchasing snacks or coffee on mountain

Visitor preference...

- While some like to cook food at their campsite, they still want the option to be able to go out for dinner without having to drive to a surrounding town
- There is a strong need for healthier food options among event goers and families
- Most are willing to pay more for higher quality and healthy food options

First move...

Cater to needs of event goers as a priority with healthy options that support their event needs (carb loading and energy building)

What to do

Current state...

- Some event patrons are aware of the primary bike and hiking infrastructure available, although many are only exposed to what the event area has to offer rather than the wider region
- Very limited knowledge among non-visitors of what is available for families and non-exercise focused visitors

Visitor preference...

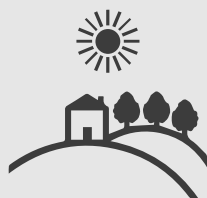
- Visitor centres and huts located on the mountains should have up to date information on what is available in the region
- Exercise-focused visitors enjoy the activities and support services tailored to their needs and they want more (i.e. bike shuttle busses)

First move...

Encourage return visitation of event patrons for non-event trips with friends through promotions targeted at riding clubs and groups alike

How to differentiate from “traditional” summer holiday locations

Less is more



- ▶ **Minimal traffic...** it is easy to drive around the region with little to no traffic, often not seeing another car
- ▶ **Minimal crowds...** while some of the nearby towns are overcrowded, the mountains have vast spaces with few tourists
 - Small visitor to area ratio allows visitors to feel as though they have the place to themselves
- ▶ **Minimal expense...** Although some accommodation options are perceived as expensive, a holiday to the region is generally regarded as an inexpensive option

Natural beauty



- ▶ **Nature like no other...** although Victorians are aware of alternative holiday destinations offering natural attractions, the region offers beautiful landscapes that cannot be experienced in any other part of the state
- ▶ **Temperature...** the cooler climate of the region is a differentiating factor, often a primary drawcard for many of the visitors to the region
- ▶ **Fresh water...** while many seek beaches during summer holidays, the region offers an alternative in the form of fresh water lakes and rivers

Degree of separation



- ▶ **Lack of technology...** the ability to ‘unplug’ on a holiday to the region is a key driver for many parents taking their children away
- ▶ **Simple pleasures...** many appreciate the chance to remove themselves from the daily hustle and bustle, enjoying the simplicities and silence of the region
- ▶ **Distance...** the region’s proximity to Melbourne differentiates it from popular holiday destinations in that it is close enough to drive to but far enough away to really feel disconnected from the city

Health and adventure



- ▶ **Existing infrastructure...** the region offers visitors a range of high quality roads, tracks, and courses for bike riding and hiking
- ▶ **Likeminded travel parties...** adventure- and exercise-driven visitors to the region enjoy meeting and sharing experiences with other visitors with similar interests
- ▶ **More of the same...** those who visit the region to hike and ride bikes often return, visiting different mountains, roads, tracks and courses each time

Two main types of visitors during Green Season

There are two distinct groups of visitors to the Victorian Alpine Region during Green Season: those attending scheduled events such as organised races or competitions, and those who visit with their family or close friends for non-event based outdoor activities such as hiking or camping.

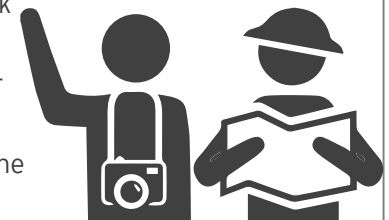
Event visitors

- ▶ Often visit the region regularly / repeat visitors (sometimes every month or so)
- ▶ Will come to the region because of events (such as Mile High Regatta for dragon boat racing, Audax Alpine Classic) but are open to returning for leisure getaways
 - Commonly return with friends - might camp instead of booking a hotel
- ▶ Will generally stay on the mountain to be close to the event venue
- ▶ Look for comfortable accommodation so they are 'well rested' for the event, especially those who are engaging in an active, physical activity (i.e. mountain bike racing)
- ▶ Most bring their own food because they want to eat healthy - this is a major need and there aren't as many healthy options in cafes/pubs on mountain
- ▶ Attracted by services that support their activities - i.e. shuttle busses driving mountain bikers to the top of the tracks - this influences their choice of mountain to visit



Day trip visitors

- ▶ Tend to visit with groups of families and/or close friends
- ▶ Tend to stay in accommodation off the mountain - such as Bright, Beechworth etc.
 - Towns are closer to all the amenities they need - food, affordable accommodation, activities
- ▶ Unlikely they will stay on mountain overnight because of the lack of accommodation and lack of proximity to everything else such as activities and food options
- ▶ Main attraction is 'famous' towns such as Beechworth, and the mountains offer activities for one or two days of the trip
- ▶ Will go to the mountains for day trips - as such they require more cafes or food options on the mountain



Prioritising areas of focus to grow visitation during Green Season

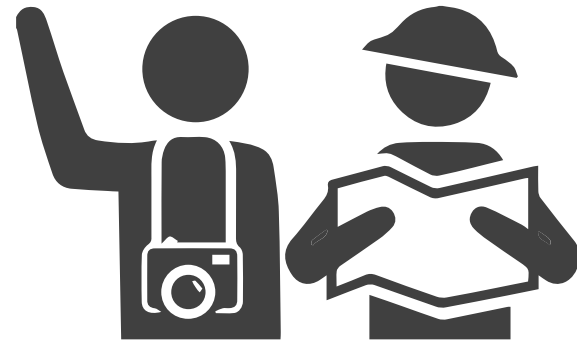
Easier to achieve

Harder to achieve



Event goers

Increasing visitation by event goers, and maximising the opportunities offered by events, should be key areas of focus in the short term given that most of the work requires **simply educating and promoting to an existing visitor base.**



Non-event goers

Growing visitation and expenditure by daytrip visitors (and turning them into overnight visitors) will require **greater investment in infrastructure, promotion, and coordination across towns and resorts.**

Short term focus

Longer term focus

Maximising the opportunity that events offer (stage 1)

Event packages



- ▶ Could consist of a ticket to the event, paired with accommodation for the night before / night of, and meal vouchers for local restaurants or pubs
- ▶ Incentivise event visitors to really engage with local businesses by offering discounted tickets or pre-paid meal vouchers which are included in event packages

Increase rider/hiker services



- ▶ Riders are already going to the region during Green Season and will continue to do so, although the offering can be extended
- ▶ There is a need for more accommodation on some mountains
- ▶ All mountains require greater food and beverage offerings (including those that are open outside of event hours)
- ▶ Strong need for healthier food on all mountains, to cater for the active, healthy lifestyle of adventure enthusiasts
- ▶ Services such as shuttle busses for riders are strong drivers of visitation

Capitalise on word of mouth



- ▶ Word of mouth is a key driver of visitation (for both event goers and others)
- ▶ Promote activities and services designed specifically to capture riders - liaise with riding clubs and give them discounts to visit the mountains
- ▶ Riders are active sharers within their riding groups - they will talk to other riders and the word will spread
- ▶ Many riders didn't know how good it was for riders in the Alpine Region until they came up for an event - the region needs to proactively capitalise on the appeal of the offer and promote it to grow visitation

Increasing expenditure during Green Season for event goers (stage 1)

Key findings



- ▶ Event goers often do not know what amenities will be open during the event
- ▶ Many will ensure they are self-sufficient while on the mountains - bringing enough food to cover all meals, bringing a caravan or camping gear
- ▶ Event goers are often disappointed by the lack of facilities catering for the influx of event goers. Coffee shops and small supermarkets are open during the weekend, however open too late (after the event starts) and close too early (before attendees return)

Educate event goers



- ▶ Before they arrive, event goers should be able to access an information bulletin, list of facilities and amenities that will be open during the event. This includes opening hours, websites, menus
- ▶ They can then pre-plan their activities and meals, such as making restaurant bookings. They need to be reassured that going on a self-contained trip to the region is not a requirement - can rely on local facilities and amenities
- ▶ This is a win-win solution - visitors know they will be able to buy a meal while on the mountain, and restaurants can cater for the influx of people who visit for events
- ▶ Consider partnering hotels with local restaurants or pubs to cross promote their offerings

Cater for event schedules



- ▶ To really capitalise on event visitors, facilities and amenities need to cater to the schedule of the event that has brought people there in the first place
 - This requires opening before attendees leave, and staying open after they return
- ▶ Consider group packages for events - multiple mountain accommodation venues working together to offer package deals to event patrons attending a number of events over the season

Tailoring the offer to non-event goers (stage 2)

Increase promotion and education



- ▶ Educate the public on what is on offer in the region, including the beautiful sights and scenery that they can't get anywhere else
- ▶ Promote the areas that can be visited only in summer (not during snow season) due to lack of accessibility during winter
- ▶ Non event-goers need more confidence in the success of the trip and that it will be worth their while, including available attractions, before making the decision to go up the mountain

Leverage 'famous' towns



- ▶ Bright, and to a lesser extent Mount Beauty and Omeo, are the closest regional areas which offer amenities and suppliers to cater to visitors to the region
- ▶ Need to move people away from these towns, to encourage them to spend their money on the mountain instead - lack of awareness, and a small range of facilities and amenities, are the key barriers to this
- ▶ Resorts should consider working with the towns to cross-promote their offerings. In this way the resorts can piggyback off the foot traffic through the towns

Maximise day trip expenditure



- ▶ Some people will not stay overnight on the mountain, so the resorts need to promote day trips for people to visit from nearby towns
- ▶ Educate visitors to nearby towns that there is food, beautiful locations, and activities on offer in the mountains, that you can't see or do in the towns
- ▶ The flying fox and laser skirmish at Lake Mountain are good examples - these are positively received as parents stated that their children love short, fun, adrenaline-pumping activities like these. Consider promoting these attractions in nearby towns as a good daytrip option for visitors

Developing a proposition



Key territories to consider for communications

- ▶ Visitors to the region during Green Season were asked to describe, in a short sentence, one thing that they would tell others to encourage them to visit the region during Green Season.
- ▶ The comments are provided below simply to illustrate the key sentiments which visitors to the region believe would motivate others to visit as well (they are not intended to be slogans or key messages as they currently stand).



***Lose yourself and
get lost at the same
time***



***Lose yourself in a
safe way - not too
far from civilisation
and support***



***Every adventure is
different***



***Never had a bad
experience***



Get a real escape



***Get an extra degree
of separation***



***You'll never breathe
fresher air***



***See beauty that you
couldn't imagine***



***It's made for people
who are into fitness
or riding***

Key findings and recommendations

1 Low awareness is key barrier to visitation

Finding

There is a lack of awareness of what the region would be like or have to offer during the spring/summer/autumn period. This leads to hesitation to visit, for fear that it won't be worth the time or effort required, or visitors won't enjoy the getaway

Recommendation

Help target audiences visualise themselves there. Tap into the emotional benefits of participation rather than simply highlighting activities. Invest in a social media campaign to build familiarity and communicate the region's offering (i.e. beautiful landscapes, activities) and point-of-difference (i.e. low cost options, proximity to Melbourne, moderate temperatures)

Outcome

While social media marketing investment may not lead to immediate region preference, it will likely provide a platform for long-term familiarity, correct misconceptions, and reinforce the region's offering for future Green Seasons

2 Rugged nature perceptions are limiting

Finding

Immediate perceptions of a Green Season getaway or holiday relate to rugged camping trips in which visitors are self-sufficient and sleeping in nature. This limits appeal to the 'outdoorsman' type and interest is much lower among those who prefer full service / amenities

Recommendation

The spectacular scenery, crisp clean air, and nature-related activities are all strengths of the region which are key drivers of visitation. However any promotion of the region through this lens must be complemented with information about the full range of services available in order to gain broad appeal

Outcome

People from all walks of life, including those who prefer their getaways to be fully catered, will be able to take the conceptual leap to see themselves enjoying a Green Season holiday in the region

Key findings and recommendations

3 Short getaways are best suited to the region

Finding

The perception that there are limited activities to enjoy in the region, along with its relatively close proximity to Melbourne, means that short getaways (a few days) are more realistic than long stays (of a week or more)

Recommendation

Leverage the region's proximity to Melbourne to cultivate the perception that the region is suitable for short stays, with minimal planning and commitment required

Outcome

Region familiarity will grow as the market learns more about the region's close (easily driveable) proximity to Melbourne, setting the platform for long-term consideration as a spontaneous getaway destination

4 White Season skews perceptions of Green Season

Finding

The comprehensive snow-related offering during White Season leads many to believe that during other seasons, there will be nothing of note to see or do in the region. Resorts, chalets, restaurants etc. are all perceived to be tailored to the busy snow season, so it is assumed these would be closed during Green Season

Recommendation

During White Season, promote the facilities and amenities which are open to visitors year round, and re-contact visitors with direct marketing (information and discounts) for the upcoming Green Season. The key is to promote how the Green Season getaway is different from, yet equally appealing as, the White Season getaway

Outcome

Visitors to the resorts during White Season will be educated on how the offering is different during warmer weather, but equally as fun and inviting. This perception, along with loyalty discounts, will encourage repeat visitation at other times of year as White Season visitors will be incentivised to return

Key findings and recommendations

5 Bright, the closest hub of facilities and amenities, is very appealing to visitors

Finding

Due to Bright's appeal, size, and options available, visits to the region during warmer weather are often anchored there. It is the closest hub of facilities (accommodation, food/beverage, activities, wineries, bakeries etc). It is appealing to stay overnight in Bright and do day trips to the resorts/mountains (such as for a hike or motorcycle ride)

Recommendation

Partner with accommodation providers in Bright to offer day trip (or one night trip) packages. Offer all inclusive packages (accommodation, food and drinks, activities, and transport) with a knowledgeable tour guide accompanying visitors around the region

Outcome

Visitors can explore the region with the ease of a fully organised and catered trip planned for them. This takes the pressure off them to find activities and amenities to ensure everyone enjoys the trip. It also provides an incentive for local businesses to open when they know there is going to be a sizable group of people in the area

6 The main, unique attraction is the natural beauty

Finding

The main attraction to the Victorian Alpine Region during the spring/summer/autumn period is its beauty, scenery, and nature qualities, while available activities only act as an additional offering (as they are not unique to the region)

Recommendation

Both traditional and modern communication channels should be adopted to communicate the natural beauty of a Green Season getaway. Websites (Trip Advisor, local council sites), social media, and a dedicated site for Green Season offerings should be utilised

Outcome

The market will have a clear understanding of the unique features of the region during Green Season, allowing for a strong and credible association to beautiful natural landscapes which motivates visitation

Key findings and recommendations

7 For event goers, capitalise on existing visitation to increase expenditure

Finding	Recommendation	Outcome
Event goers are already visiting the region often, but they tend to self cater (camp, bring own food) in the absence of knowledge about paid accommodation or food/beverage offerings that will be available at times that align with the event schedule	There is a significant opportunity to better cater for event patrons (including event schedules). Consider utilising event organisers as promotional channels to educate event goers about where they can stay, eat, and explore while attending the event	Event goers will spend more on local amenities (accommodation, food and beverage, activities) rather than self catering. They will also have more of a 'holiday' experience through staying in serviced accommodation and not having to cook meals (and clean up afterwards)

8 For non event goers, increase expenditure on daytrips, and encourage overnight stays

Finding	Recommendation	Outcome
Non-event based travel parties visiting the region lack confidence in its ability to adequately accommodate their overnight needs. The region's lack of affordable accommodation and available food and beverage options limit this type of visitor's stay to day trips	As referenced in finding 5, it is recommended that the resorts partner with surrounding towns (i.e. Bright) to cross promote one another's offerings including day trip (or one night trip) packages	Familiarity of the region's offering will grow among non-event visitors, therefore increasing their confidence to stay longer and spend more. This confidence should also translate to revisitation among visitors, who now have the required assurance their holiday will be 'successful'

Reactions to new concepts

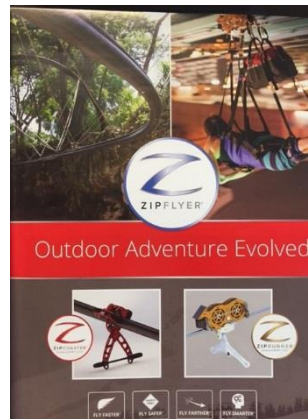
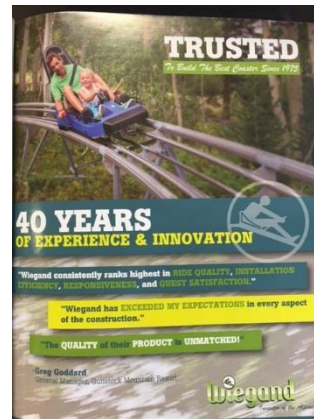
- The main reactions to concepts from other parts of the world are...

Some fit with the region – the concepts align with the 'outdoor adventure' theme associated with the region

Faster paced activities generate the most appeal (for adults), but slower paced concepts (like cable cars) could be a great way to take in the spectacular scenery

Some concerns that these types of activities would be expensive

Activities would not drive visitation to the resorts in and of themselves – they would be an add-on to an existing trip



"The only thing for me, thinking about all of these things, is I hope that it doesn't wreck the environment too much. Because you don't want it to be too concrete. At the moment it's just got a natural beauty, and I wouldn't like these things to be too out there. If they were hidden, maybe okay, but I wouldn't want to just walk in there and go, "oh my god," and to feel like you're in Disneyland. I think it doesn't suit this kind of place." -Visited Alpine Region in Green Season previously

There is some interest in these concepts and good fit with the region, but a strong desire to ensure that any new amenities constructed do not take away from the landscape and scenery. This is unique and a compelling reason to visit and if the views were marred with man-made ziplines or slides, that would detract from the experience. No single activity will drive visitation to the resorts however offering three or four meaningful activities will increase appeal and consideration.



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