2017 TOCAL FIELD DAYS

Event Research Report

DESTINATION RESEARCH
know your potential

Authored by: Jo Mackellar
23 May 2017

Introduction

The 2017 Tocal Fields Days were held on May 5-7 on the grounds of Tocal Agricultural Centre attracting an audience of approximately 22,000 over the three days. This report summarises the results of the visitor survey undertaken by independent researchers at Destination Research & Development. Data was primarily collected using paper-based surveys throughout the event venue, from a sample of 415 patrons, providing a random error of 5% at 95% confidence level. The results provide analysis of the profile of the audience as well as their spending patterns and opinions of the event.

The following key results were found:

- 80% of visitors are aged 18 years and over.
- 29% of visitors brought children with them.
- 50% of visitors came from Maitland and Newcastle.
- 31% of visitors travel more than 50kms to the event.
- 9% of visitors are primary producers.
- 92% of visitors returned home after the event.
- 8% of the visitors used local accommodation.
- 54% of visitors spent up to $100 during their time at the event.
- 18% spent between $200 and $500 during their time at the event.
- 28% heard about the event through word of mouth, 12% through the Internet.
- 71% felt the atmosphere was excellent.
- 67% felt the **organisation** was excellent.
- 45% of visitors suggested the event needed no improvements.

Responses from visitors suggest they are very satisfied with their experiences at Tocal and especially impressed with the atmosphere, venue and organisation of the event. Visitors are interested in finding and buying products, looking at livestock and food and wine. The event continues to prosper as a result of the continued satisfaction of visitors each year and the high proportion of visitors who recommend the event through word of mouth. Social media apps such as Facebook and Instagram will be useful tools to harness the positive word of mouth.

Table of Contents

Visitor Profile

The demographic profile has remained fairly consistent over the 7 years of the event research indicating that visitors to the Tocal Field Days are from a variety of age groups, and from both urban and rural areas - with 9% being primary producers.

Table 1: Age Groups

	2010	2011	2012	2013	2014	2016	2017
Under 12 Years	9%	17%	4%	12%	17%	15%	16%
12-17 Years	6%	18%	5%	17%	7%	4%	4%
18-39 Years	39%	19%	27%	27%	26%	33%	28%
40-54 Years	18%	18%	29%	17%	22%	19%	20%
55+ Years	28%	29%	35%	27%	28%	28%	32%

Age and Children

The event is attractive to people of all ages, with a wide range of age groups attending. There are less teenagers than other groups, and people aged 18 years and over represents 80% of the audience. Around one third of visitors are over 55 yrs, and 29% of visitors brought children with them (0-18 yrs).

Group Size

The average group size of event attendees was the similar to previous years at 2.4, representing small groups of adults and some families. School groups also attend the event in groups of 25-30 people.

Reason to Attend

Most people attend the event as a spectator, with less than 5% of those surveyed participating in the event.

Table 2: Reason to attend

Reason	2010	2012*	2013	2014	2016	2017
Participant	5.9%	12.3%	5.7%	8.4%	8.3%	4.9%
Spectator	78.8%	62.3%	83.7%	84.4%	87.5%	90.4%
Exhibitor	12.4%	19.2%	6.0%	6.4%	1.3%	2.0%
Other	3.0%	6.2%	4.6%	0.8%	2.9%	2.7%
* data not collected in 2011						

Place of Residence

Tocal Field Days attracts visitors from many of the neighbouring regions and districts within 50kms of Tocal. Comparing data from previous years shows that the strongest geographic market segments are the Newcastle and Maitland areas, with stronger results from these markets this year. Nelson Bay also provided a stronger market segment this year.

Table 3: Place of Residence

Region**	2010	2011	2012	2013	2014	2016	2017
Newcastle*	19.2%	16.3%	20.7%	27.0%	19.7%	24.9%	27.3%
Maitland *	20.4%	26.6%	16.2%	10.6%	21.7%	27.1%	23.4%
Cessnock*	6.1%	2.1%	7.8%	7.5%	6.7%	6.0%	3.7%
Nelson Bay*	9.2%	4.7%	1.0%	8.6%	4.1%	4.1%	7.1%
Central Coast	6.7%	6.4%	7.1%	5.2%	7.0%	7.9%	5.1%
Hexham*	6.4%	6.9%	6.4%	4.6%	7.0%	6.3%	9.0%
Sydney	5.5%	9.0%	8.2%	6.9%	4.9%	2.5%	1.7%
Central & Western NSW	0.7%	3.0%	4.1%	3.7%	1.2%	1.3%	0.4%
Gloucester*	2.1%	3.0%	3.4%	2.6%	3.6%	1.9%	1.4%
Interstate (ACT, VIC QLD) & overseas	2.7%	1.3%	3.4%	2.0%	0.3%	0.0%	0.5%
Singleton/Branxton*	2.4%	4.7%	3.4%	3.2%	8.1%	6.3%	4.9%
Dungog*	1.8%	3.9%	2.8%	2.6%	3.8%	1.5%	4.4%
South Coast Various	2.7%	0.0%	2.7%	2.0%	0.0%	0.9%	0.1%
Stroud/ Bulahdelah/Wingham	3.3%	3.9%	4.5%	1.7%	1.7%	2.2%	1.9%
Tocal*	2.4%	1.7%	2.1%	4.0%	3.5%	1.5%	5.4%
North Coast NSW	3.9%	1.7%	3.0%	1.4%	0.9%	0.6%	0.5%
Scone & Muswellbrook	1.5%	3.9%	1.4%	3.5%	2.7%	3.5%	2.0%
Taree*	1.5%	0.9%	1.4%	1.7%	1.4%	0.9%	0.7%
Kurri Kurri*	1.5%	0.0%	0.7%	1.2%	1.7%	0.6%	0.5%

* includes surrounding towns to the postcode
** excludes blank responses

Annular Region Analysis

Further analysis of the postcodes using an *annular region analysis* provides an alternate method of analysing the distances audiences have travelled to the event, by plotting their postcodes on an annular map. The results (illustrated in Table 4) suggest:

- a continued increase in those coming from local areas (<50kms),
- 32.3% of visitors travel more than 50kms to attend the event.

Table 4: Place of Residence – Annular analysis

Annular	2010	2011	2012	2013	2014	2016	2017
<50kms	38.7%	41.2%	49.3%	49.1%	59.8%	63.5%	68.7%
51-100kms	33.2%	27.9%	15.1%	25.9%	25.8%	17.9%	17.3%
101-200kms	18.3%	24.5%	21.2%	17.7%	12.0%	15.4%	10.6%
201-400kms	4.3%	3.0%	4.1%	4.7%	1.2%	1.3%	0.2%
400+kms	5.4%	2.7%	6.9%	2.6%	1.2%	1.9%	1.2%

Figure 1: Annular Region

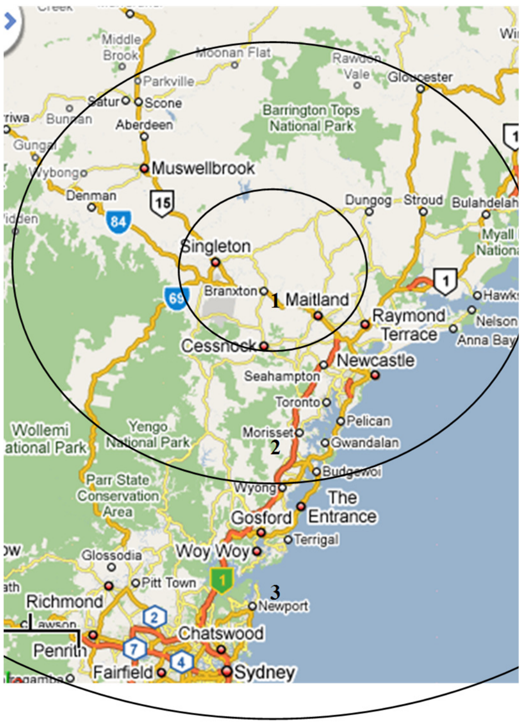


Figure is for illustration purpose and is not to scale

Accommodation Use and Length of Stay

Respondents were asked the type of accommodation they used and the number of nights/ days stayed. The results indicate a high proportion of day-trippers using their own home for accommodation. However 8% of visitors used local accommodation, such as hotels/motels and the homes of friends and family. Those who stayed longer, stayed for an average of 2.1 nights.

Table 5: Accommodation Choice

	2010	2011	2012	2013	2014	2016	2017
Own Home	85%	90%	70%	80%	94%	91%	92%
Hotel/motel	7%	2%	7%	8%	2%	1.7%	3%
Campsite	1%	1%	1%	1%	1%	1%	1%
Rented House/Apt	4%		3%	4%	1%	1%	1%
With Friends	1%	7%	0%	1%	1%	1%	1%
Other	2%	0%	6%	6%	1%	2.3%	3%
Average nights stayed	*2.5*	*2.8*	*2.5*	*2.2*	*2.3*	*2.1*	*2.1*

Visitor Expenditure

The pattern of expenditure of visitors to Tocal Field Days suggests that most people (63.4%) spent between $50 and $100 during their time at the event. There was an increase in those spending between $200 and $500 this year, and further analysis indicates these people to be mainly from Maitland and Newcastle as well as Sydney and Nelson Bay - with a higher than average interest in the 'products for sale'.

Table 6: Expenditure group

Event Expenditure	2010	2011	2012	2013	2014	2016	2017
$0 - $50	32.4%	19.2%	**30.1%**	23.7%	28.4%	31.6%	16.7%
$51 - $100	**35.9%**	27.8%	23.3%	**37.1%**	**30.1%**	**31.8%**	**38.1%**
$101 - $200	18.6%	**31.6%**	21.2%	22.8%	20.1%	19.6%	17.4%
$201 - $500	7.2%	11.5%	10.3%	7.5%	9.7%	9.6%	18.2%
Over $500	6.0%	9.9%	12.3%	9.0%	8.4%	7.4%	9.7%

Promotion Analysis

Visitors were asked about the sources they had used to gain information about Tocal Field Days. Respondents were able to choose more than one option, with around 21% suggesting they used 2 or more options.

As in previous years, informal promotions such as 'word of mouth' accounted for the majority of information choices (28%). The internet/website usage is still increasing now rising to 12%, and many of the "other" responses (18%) relate to social media such as Facebook and previous visits. While flyers remain relevant, newspaper and radio were not quite as effective this year.

Figure 2: Advertising effectiveness

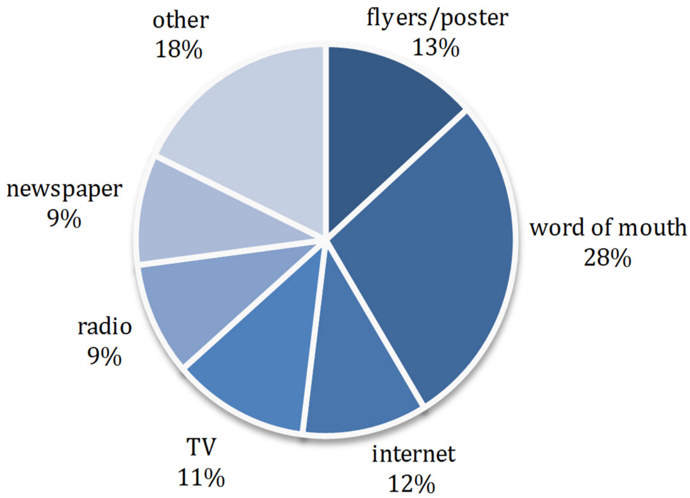


Table 7: Advertising Effectiveness

Advertising	2010	2011	2012	2013	2014	2016	2017
Flyers	8.0%	4.3%	7.1%	5.7%	6.7%	11.0%	13%
Word of mouth	37.8%	21.5%	25.1%	31.9%	38.1%	28.1%	**28%**
TV	19.5%	10.7%	15.2%	15.9%	20.2%	18.1%	11%
Internet	1.6%	2.1%	2.3%	4.8%	5.0%	11.7%	12%
Radio	5.0%	1.7%	6.4%	9.8%	11.1%	11.4%	9%
Newspaper	6.8%	8.2%	15.8%	13.9%	16.7%	13.9%	9%
Other (& previous visit)	21.4%	51.5%	28.1%	18%	2.1%	5.7%	18%

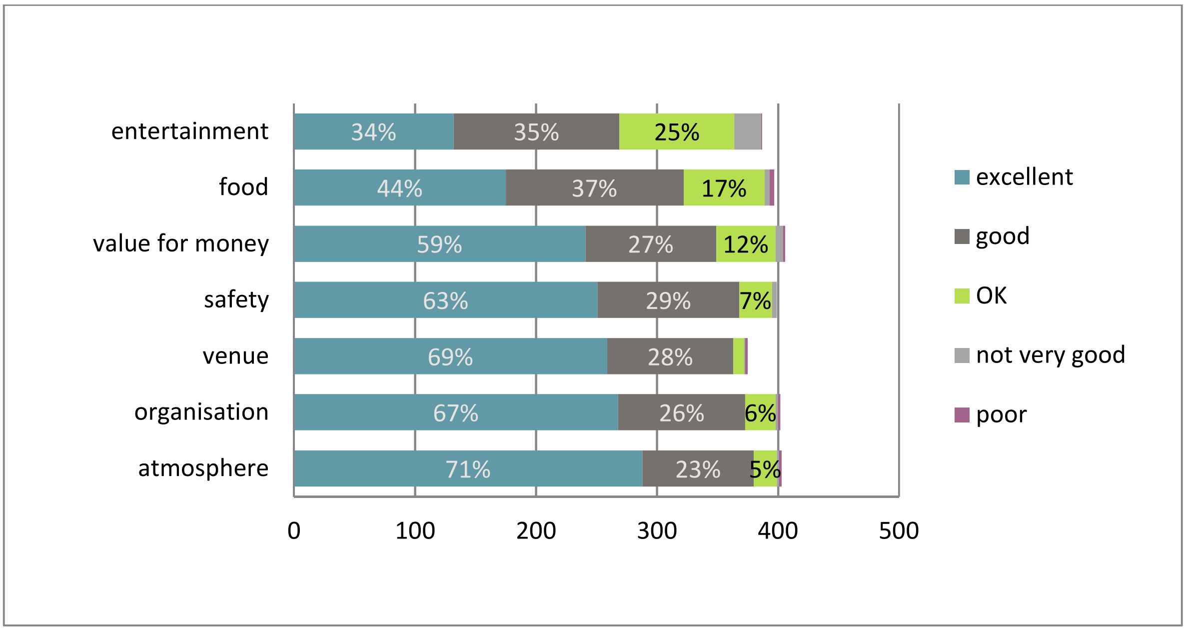
Opinions of the Event Experience

Respondents to the survey were asked to describe and rate their event experience, both on a rating scale and in open-ended responses. The results are described below.

Event Experience Ratings

Respondents were asked to rate their satisfaction with aspects of the event on an Event Experience Rating Scale from 1 to 5, with 1 being 'poor' and 5 being 'excellent'. As can be seen in Figure 4 most aspects of the event rated well receiving positive results of good and excellent.

Figure 4: Event Experience Ratings



The highest rating aspects of the event across all 7 years of research has been for **atmosphere** with average response rates of 4.6 out of 5. This year 71% felt the atmosphere was excellent, and a similar number felt the **organisation** and **venue** were also excellent. Weaker ratings are given for food and entertainment. This is an industry wide trend as seen in the analysis below.

Industry benchmarking of event experience ratings

In order to compare the satisfaction of visitors against industry standards, the ratings across the aspects of the event, were benchmarked to other events, of a similar size (# of visitors) and scope (agricultural or community event) in regional areas of NSW[1]. This can be useful to understand general industry trends, and the relative performance of Tocal Field Days [2]. From the database of 53 events, 8 events were chosen as being similar in size and scope for comparison across the same *aspects of satisfaction* as measured in this study[3]. For each aspect of satisfaction, the results from each of the 8 events are shown, and a "regional event average" was calculated. This is shown in the table below, along with Tocal's 7 year average. As illustrated Tocal performs ***slightly above the industry average*** in all aspects.

Table 8: Industry Benchmarking

	industry average 2010-2014	Tocal average 2010-2017	*+/- industry average*	Tocal 2017
food	3.96	4.13	*0.17*	4.09
entertainment	3.99	3.99	*0.00*	4.06
safety	4.20	4.43	*0.23*	4.51
organisation	4.27	4.48	*0.21*	4.63
atmosphere	4.41	4.55	*0.14*	4.77

---

[1] This analysis uses the data collected by Destination Research & Development, as no other information of this type is publicly available.

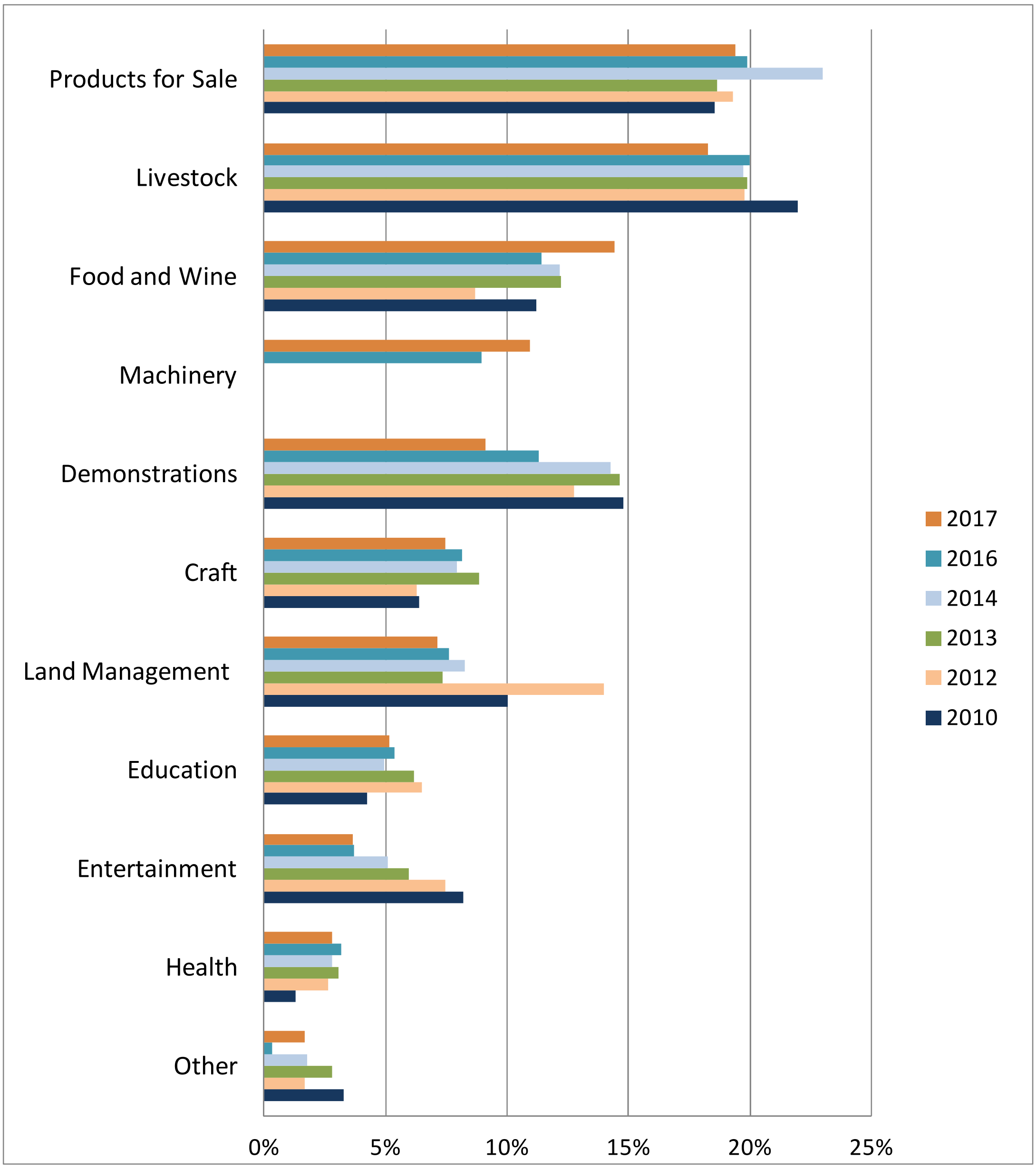
[2] It should be noted that different events utilise different types of venues (both built and natural) and have access to differing levels of food and entertainment providers. Events in some regional areas, for example, struggle to attract decent food vendors. Visitor expectations, and therefore their satisfaction ratings, are also dependent upon whether visitors have paid admission fees. The higher the admission fee, the higher the expectation of entertainment and/or facilities such as clean toilets and seating.

[3] Events included: Primex, Bridge to Bridge, Cooly rocks on, Grafton Jacaranda Festival, Sheepvention, Kurri Kurri Nostalgia Festival, Jerilderie Letter event, Casino Show.

Areas of Interest

Respondents were asked to choose their three favourite attractions at the event from a list of activities and attractions. The results suggest that ***Products for Sale*** and ***Livestock and Animal Displays*** continue to be the most popular attraction for the event. A higher proportion of visitors were also interested in ***Food and Wine and Machinery.*** Those that selected "Other" as their choice, specifically stated plants, chickens, pig races as their main area of interest.

Figure 3: Areas of interest



* note: machinery was not measured in previous years.

Suggestions for Improvement

Overall satisfaction remains very high with 45% of visitors suggesting the event needed no improvements. Suggestions for improvements were made in similar areas to previous years, with slight increases in comments around entertainment. Improvements to 'facilities including toilets and seating' have been well noted, with less issues noted in the surveys this year. A full list of comments have been given to the event manager.

Table 9: Improvement themes

Area for improvement	2010	2011	2012	2013	2014	2016	2017
Nothing	23%	17%	32%	38%	26%	40%	45%
Entertainment/Attractions	26%	12%	10%	20%	14%	16%	22%
Facilities incl toilets & seating	18%	5%	10%	12%	14%	15%	8%
Parking/access	<1%	3%	0%	<1%	7%	7%	7%
Information	1%	3%	3%	5%	12%	0%	5%
Other	11%	4%	8%	5%	12%	4%	4%
Entry Fee	12%	8%	25%	9%	12%	10%	3%
Food and Beverage	5%	5%	3%	3%	4%	3%	3%
Advertising/Signage	3%	3%	8%	5%	0%	4%	1%
Weather	0%	35%	0%	0%	0%	2%	0%