2019 TOCAL FIELD DAYS

Event Research Report

DESTINATION RESEARCH
know your potential

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Introduction

The 2019 Tocal Fields Days were held on May 3-5 on the grounds of Tocal Agricultural Centre attracting an audience of approximately 21,700 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 140 patrons, providing a random error of 7% at 90% 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:

- 78% of visitors are aged 18 years and over.
- 35% of visitors brought children with them.
- 46% of visitors came from Maitland and Newcastle.
- 45% of visitors travel more than 50 kms to the event.
- 15% of visitors are primary producers.
- 96% of visitors returned home after the event.
- 4% of the visitors used local accommodation.
- 47% of visitors spent over $200 during their time at the event.
- 26% heard about the event through word of mouth,
- 34% indicated they knew about the event from a “previous visit”
- 64% felt the venue was excellent.
- 61% felt the organisation was excellent.

Analysis of the media used by visitors highlights the wide range of media types needed to promote the event, including traditional (TV, newspapers and radio) and new media (social media and internet). Once at the event visitors are keenly interested in finding and buying products as well as appreciating the food & wine and livestock.

The research demonstrates the continued high level of visitor satisfaction with the experiences at Tocal Field Days. Visitors were especially impressed with the venue and organisation of the event - with 95% of visitors feeling the event met their expectations.

Table of Contents

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Visitor Profile

The demographic profile remains consistent over the nine 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 **15% being primary producers**.

Table 1: Age Groups

	2010	2011	2012	2013	2014	2016	2017	2018	2019
Under 12 Years	9%	17%	4%	12%	17%	15%	16%	10%	19%
12-17 Years	6%	18%	5%	17%	7%	4%	4%	8%	3%
18-39 Years	39%	19%	27%	27%	26%	33%	28%	28%	33%
40-54 Years	18%	18%	29%	17%	22%	19%	20%	22%	14%
55+ Years	28%	29%	35%	27%	28%	28%	32%	32%	31%

Age and Children

The event is attractive to people of all ages, with a smaller ratio of teenagers than other groups. People aged 40 years and over represents 45% of the audience, and 35% of visitors had children (0-18 yrs) in their group.

Group Size

The average group size of event attendees was similar to previous years at 2.5, representing small groups of adults and some families. School groups attended in groups of 25-30 people, and larger groups of seniors also attend the event.

Reason to Attend

Most people attend the event as a spectator, with 16.5% of those surveyed participating in the event. Activities which offer opportunities for participation are important to engaging new and existing audiences.

Table 2: Reason to attend

Reason	2010	2012*	2013	2014	2016	2017	2018	2019
Participant	5.9%	12.3%	5.7%	8.4%	8.3%	4.9%	7.7%	16.5%
Spectator	78.8%	62.3%	83.7%	84.4%	87.5%	90.4%	86.2%	80.6%
Exhibitor	12.4%	19.2%	6.0%	6.4%	1.3%	2.0%	5.6%	2.9%
Other	3.0%	6.2%	4.6%	0.8%	2.9%	2.7%	0.5%	0.0%
* data not collected in 2011								

Place of Residence

Tocal Field Days attracts visitors from many of the neighbouring regions and districts within 50 kms of Tocal. The place of residence shown in Table 3 below includes surrounding towns/suburbs to the postcode (e.g. Newcastle includes Wallsend and Belmont). Comparing data from previous years shows that the strongest geographic market segments are the Newcastle and Maitland areas. Other areas such as Nelson Bay and Hexham continue to provide strong visitation, although this year there were more visitors from Singleton/Branxton. As shown, the smaller sample size has had an impact on capturing respondents in areas such as Gloucester.

Table 3: Place of Residence

Place of residence **	2010	2011	2012	2013	2014	2016	2017	2018	2019
Newcastle*	19.2%	16.3%	20.7%	27.0%	19.7%	24.9%	27.3%	25.7%	24.3%
Maitland *	20.4%	26.6%	16.2%	10.6%	21.7%	27.1%	23.4%	20.1%	20.6%
Hexham*	6.4%	6.9%	6.4%	4.6%	7.0%	6.3%	9.0%	8.5%	4.4%
Nelson Bay*	9.2%	4.7%	1.0%	8.6%	4.1%	4.1%	7.1%	7.7%	4.4%
Cessnock*	6.1%	2.1%	7.8%	7.5%	6.7%	6.0%	3.7%	5.6%	8.8%
Singleton/Branxton*	2.4%	4.7%	3.4%	3.2%	8.1%	6.3%	4.9%	5.0%	**10.3%**
Sydney	5.5%	9.0%	8.2%	6.9%	4.9%	2.5%	1.7%	4.5%	5.9%
Dungog*	1.8%	3.9%	2.8%	2.6%	3.8%	1.5%	4.4%	3.7%	4.4%
Central Coast	6.7%	6.4%	7.1%	5.2%	7.0%	7.9%	5.1%	3.4%	2.9%
Kurri Kurri*	1.5%	0.0%	0.7%	1.2%	1.7%	0.6%	0.5%	3.2%	1.5%
Tocal*	2.4%	1.7%	2.1%	4.0%	3.5%	1.5%	5.4%	3.2%	7.4%
Stroud/ Bulahdelah/Wingham	3.3%	3.9%	4.5%	1.7%	1.7%	2.2%	1.9%	2.6%	0.7%
Gloucester*	2.1%	3.0%	3.4%	2.6%	3.6%	1.9%	1.4%	2.4%	0.7%
Central & Western NSW	0.7%	3.0%	4.1%	3.7%	1.2%	1.3%	0.4%	1.1%	0.7%
Taree*	1.5%	0.9%	1.4%	1.7%	1.4%	0.9%	0.7%	1.1%	0.7%
North Coast NSW	3.9%	1.7%	3.0%	1.4%	0.9%	0.6%	0.5%	0.8%	0.7%
Scone & Muswellbrook	1.5%	3.9%	1.4%	3.5%	2.7%	3.5%	2.0%	0.8%	1.4%
Interstate (WA, QLD)	2.7%	1.3%	3.4%	2.0%	0.3%	0.0%	0.5%	0.5%	0.0%
South Coast Various	2.7%	0.0%	2.7%	2.0%	0.0%	0.9%	0.1%	0.3%	0.0%

* 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 the strongest attraction to those coming from local areas (<50 kms) – but also visitors willing to travel up to 200 kms to attend the event.

Table 4: Place of Residence – Annular analysis

Annular	2010	2011	2012	2013	2014	2016	2017	2018	2019
<50 kms	38.7%	41.2%	49.3%	49.1%	59.8%	63.5%	68.7%	62.7%	54.7%
51-100 kms	33.2%	27.9%	15.1%	25.9%	25.8%	17.9%	17.3%	18.9%	19.4%
101-200 kms	18.3%	24.5%	21.2%	17.7%	12.0%	15.4%	10.6%	11.3%	20.1%
201-400 kms	4.3%	3.0%	4.1%	4.7%	1.2%	1.3%	0.2%	0.5%	5.0%
400+kms	5.4%	2.7%	6.9%	2.6%	1.2%	1.9%	1.2%	2.0%	0.7%

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 (96%). However, 4% of visitors used local accommodation, such as hotels/motels and the homes of friends and family. Most of those staying overnight or longer are exhibitors, staying for an average of 2.0 nights.

Table 5: Accommodation Choice

	2010	2011	2012	2013	2014	2016	2017	2018	2019
Own Home	85%	90%	70%	80%	94%	91%	92%	95%	96%
Hotel/motel	7%	2%	7%	8%	2%	2%	3%	2%	0%
Campsite	1%	1%	1%	1%	1%	1%	1%	1%	0%
Rented House/Apt	4%	0%	3%	4%	1%	1%	1%	>1%	1%
With Friends	1%	7%	0%	1%	1%	1%	1%	2%	3%
Other (B&B)	2%	0%	6%	6%	1%	2%	3%	>1%	0%
Average nights stayed	*2.5*	*2.8*	*2.5*	*2.2*	*2.3*	*2.1*	*2.1*	*2.6*	*2.0*

Visitor Expenditure

The pattern of expenditure of visitors to Tocal Field Days over more recent years shows most people spend between $101 and $200 (30.4%) during their time at the event. Further analysis of those who spend over $200 indicates these people to be:

- mainly from Sydney, Maitland and Newcastle,
- with a higher than average interest in the 'products for sale',
- Non -primary producers.

Table 6: Expenditure group

Event Expenditure	2010	2011	2012	2013	2014	2016	2017	2018	2019
$0 - $50	32.4%	19.2%	**30.1%**	23.7%	28.4%	31.6%	16.7%	23.8%	20.0%
$51 - $100	**35.9%**	27.8%	23.3%	**37.1%**	**30.1%**	**31.8%**	**38.1%**	**36.1%**	24.4%
$101 - $200	18.6%	**31.6%**	21.2%	22.8%	20.1%	19.6%	17.4%	20.4%	**30.4%**
$201 - $500	7.2%	11.5%	10.3%	7.5%	9.7%	9.6%	18.2%	11.0%	17.0%
Over $500	6.0%	9.9%	12.3%	9.0%	8.4%	7.4%	9.7%	8.6%	8.1%

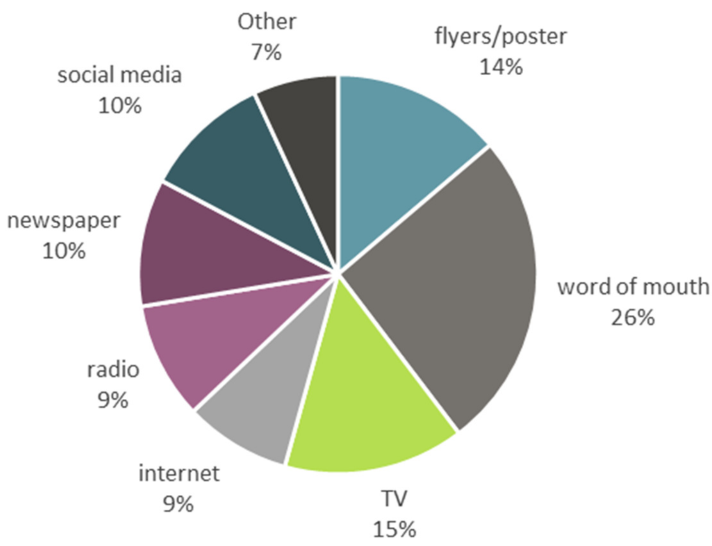
Promotion Analysis

Visitors were asked about the sources they had used to gain information about the event. Respondents were able to choose more than one option, with most suggesting they used one source – and 20% suggesting they used two or more options.

Table 7: Sources used

Media type	2012	2013	2014	2016	2017	2018	2019
One source	89%	83%	85%	78%	81%	80%	81%
Two sources	6%	10%	10%	13%	10%	12%	11%
Three sources	2%	2%	4%	7%	5%	5%	5%
Four or more	3%	5%	1%	2%	5%	3%	3%

Figure 2: Advertising effectiveness



While **word of mouth** remains the most effective promotional tool, a wide range of media are used almost equally by patrons - including social media used by 10% of visitors. Flyers/posters are still effective, as are traditional sources such as TV, radio and newspaper.

Most of the "other" responses (7%) relate to "cow cut outs" and signs on the freeway.

A further 34% indicated they knew about the event from a "previous visit".

Table 8: Advertising Effectiveness

Media type	2010	2011	2012	2013	2014	2016	2017	2018	2019
Flyers	8%	4%	7%	6%	7%	11%	13%	11%	14%
Word of mouth	38%	22%	25%	32%	38%	28%	28%	29%	26%
TV	20%	11%	15%	16%	20%	18%	11%	18%	15%
Internet	2%	2%	2%	5%	5%	12%	12%	7%	9%
Radio	5%	2%	6%	10%	11%	11%	9%	12%	9%
Newspaper	7%	8%	16%	14%	17%	14%	9%	8%	10%
Other (& previous visit)	21%	52%	28%	18%	2%	6%	18%	5%	7%
Social media	^	^	^	^	^	^	^	10%	10%

^ not asked in that year

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.

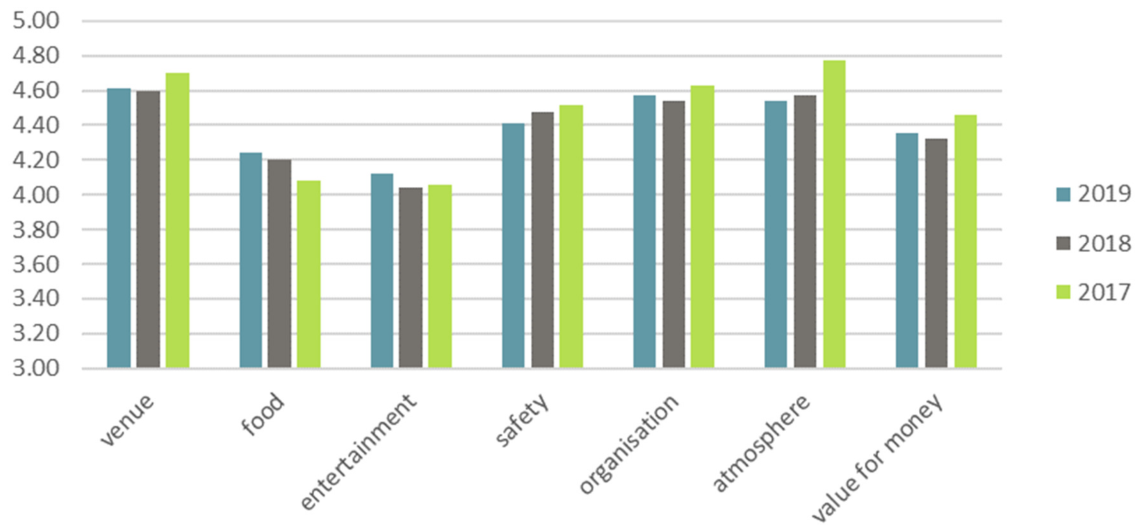
Visitor expectations

An impressive 95% of visitors felt the event met their expectations, with 4% unsure.

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 all aspects of the event rated very well receiving average positive results of either **good** and **excellent**.

Figure 4: Event Experience Ratings (average)



Comparison over the past 3 years shows the highest rating aspects of the event has been for **atmosphere** with average response rates of 4.6 out of 5. This year there were improvements in ratings for food and entertainment while the highest result was for **venue (4.61 out of 5.0)**

Lower ratings for entertainment are 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 Field Day events, of a similar size (# of visitors) and scope 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, 5 events were chosen 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 5 events are averaged to provide a "Industry Field Days average". This is shown in the table below, along with Tocal's 9 year average. As illustrated 2019 Tocal Field Days performed ***slightly above the industry average*** in all aspects.

Table 9: Industry Benchmarking

	Industry field days average 2010-18	Tocal average 2010-2019	Tocal 2019	*Tocal 2019 +/- industry average*
food	*3.92*	4.14	4.24	*0.32*
entertainment	*3.74*	4.00	4.12	*0.38*
safety	*4.23*	4.44	4.41	*0.18*
organisation	*4.31*	4.49	4.57	*0.26*
atmosphere	*4.32*	4.56	4.54	*0.22*
value for money	*4.06*	4.19	4.32	*0.26*

The perception of entertainment is often lower at Field Days as they compete with more extensive music festivals and other entertainment-based events which are solely designed to entertain. Other agricultural events often have different objectives and desired outcomes such as education and industry growth.

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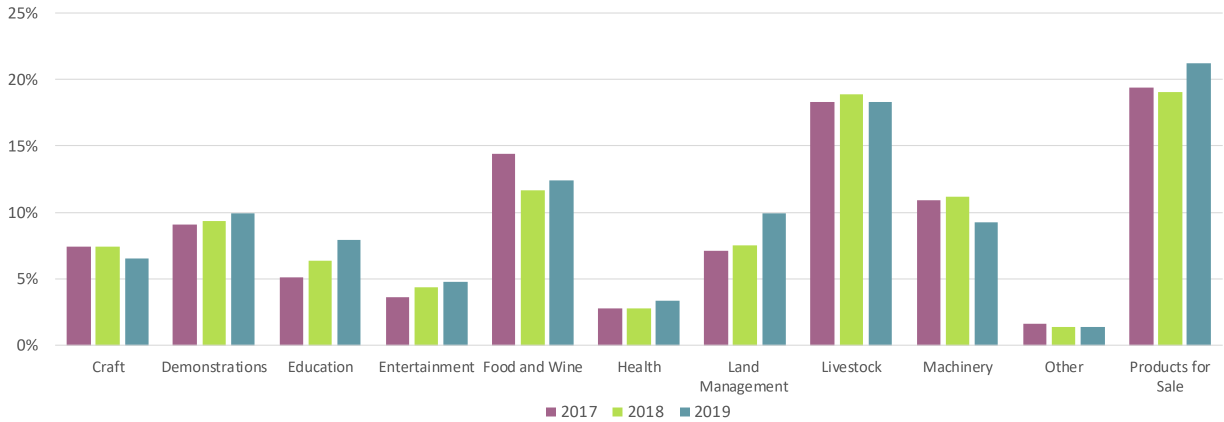
[1] This analysis uses the data collected by Destination Research & Development, as no other information of this type is publicly available.

[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, Sheepvention, Murrumbateman Field Day, Australian National Field Day.

Areas of Interest

Respondents were asked to choose their three favourite attractions at the event from a list. When compared to the past 3 years, the results show that ***Products for Sale*** and ***Livestock and Animal Displays*** continue to stimulate the most interest at the event. This year a higher proportion of visitors were also interested in ***Land Management (10%)*** and ***Education (8%)*** than in previous years. Those that selected "Other" as their choice, suggested the **plants** were their favourite area of interest.



Suggestions for improvement

Overall satisfaction remains very high with 25% of visitors suggesting the event needed no improvements. Overall there were less comments to analyse (due to smaller sample size and less comments being made). The limited suggestions were similar to previous years, with most comments around providing more entertainment in the form of more exhibitors, and kids activities.

The results suggest that previous issues with parking have been addressed with only 3% of comments relating to parking this year. A full list of comments and suggestions have been given to the event manager.

Table 10: Improvement themes

Area for improvement	2010	2011	2012	2013	2014	2016	2017	2018	2019
Nothing	23%	17%	32%	38%	26%	40%	45%	26%	25%
Entertainment/Attractions	26%	12%	10%	20%	14%	16%	22%	29%	19%
Facilities (toilets & seating)	18%	5%	10%	12%	14%	15%	8%	13%	16%
Parking/access	<1%	3%	0%	<1%	7%	7%	7%	13%	3%
Information	1%	3%	3%	5%	12%	0%	5%	6%	0%
Other	11%	4%	8%	5%	12%	4%	4%	1%	9%
Entry Fee	12%	8%	25%	9%	12%	10%	3%	2%	7%
Food and Beverage	5%	5%	3%	3%	4%	3%	3%	10%	5%
Advertising/Signage	3%	3%	8%	5%	0%	4%	1%	1%	7%
Weather	0%	35%	0%	0%	0%	2%	0%	0%	9%