

Sapphire Coast Visitor Profile and Satisfaction Survey

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Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



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Agenda

- Background
- Visitor and trip characteristics
- Why they visited the region and were they happy
- Recommendations

Background



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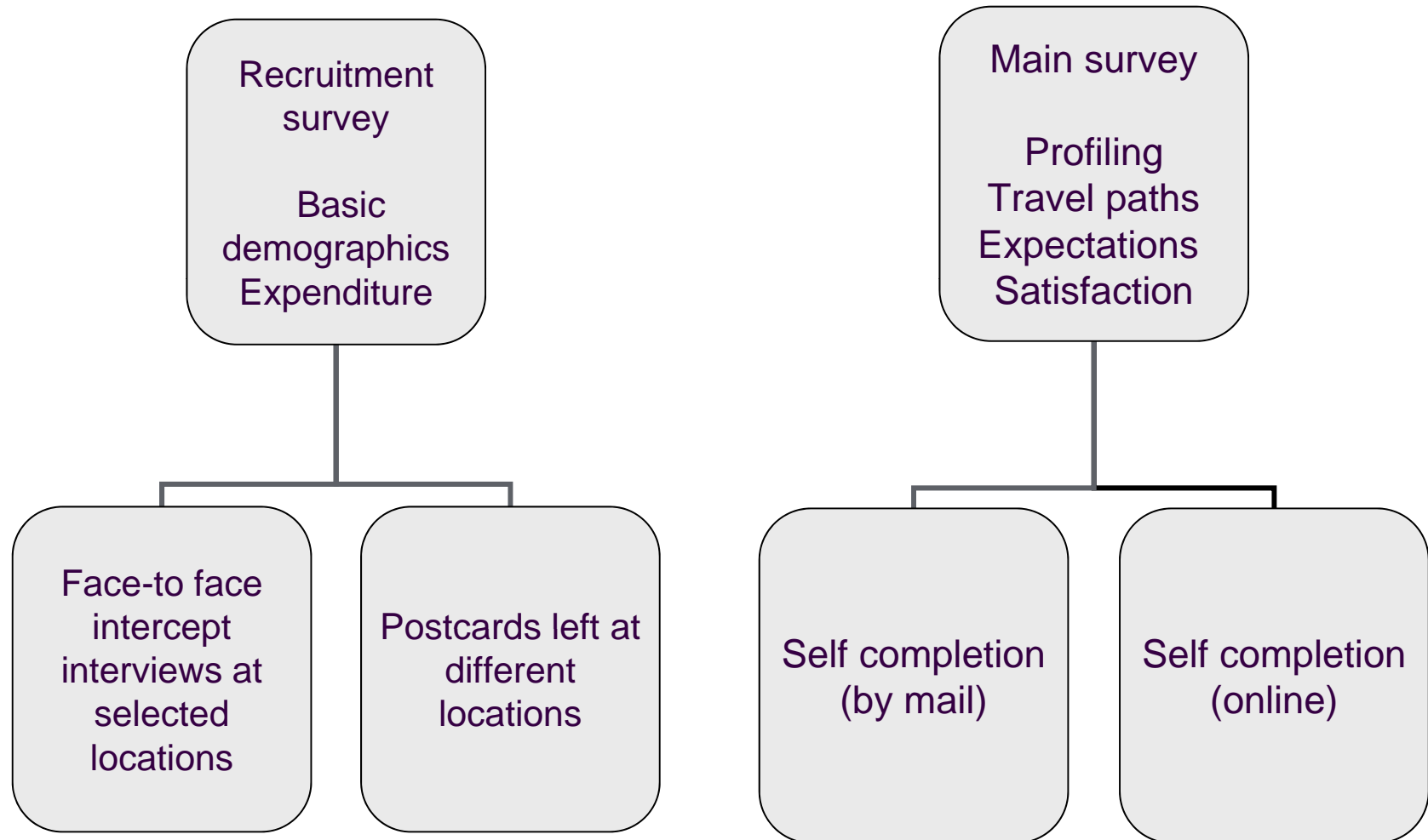
Sapphire Coast VPS project

- The Sapphire Coast Visitor Profile and Satisfaction (VPS) project is part of the TRA Destination Visitor Survey Program
- Objectives of the project were to provide information on:
 - Visitor profile.
 - Why visitors chose to visit the region.
 - Expectations of the region.
 - What visitors did here.
 - Were they happy with their visit?
- Recruitment during January to March 2011 – **during Christmas school holidays** .

VPS Benchmarks

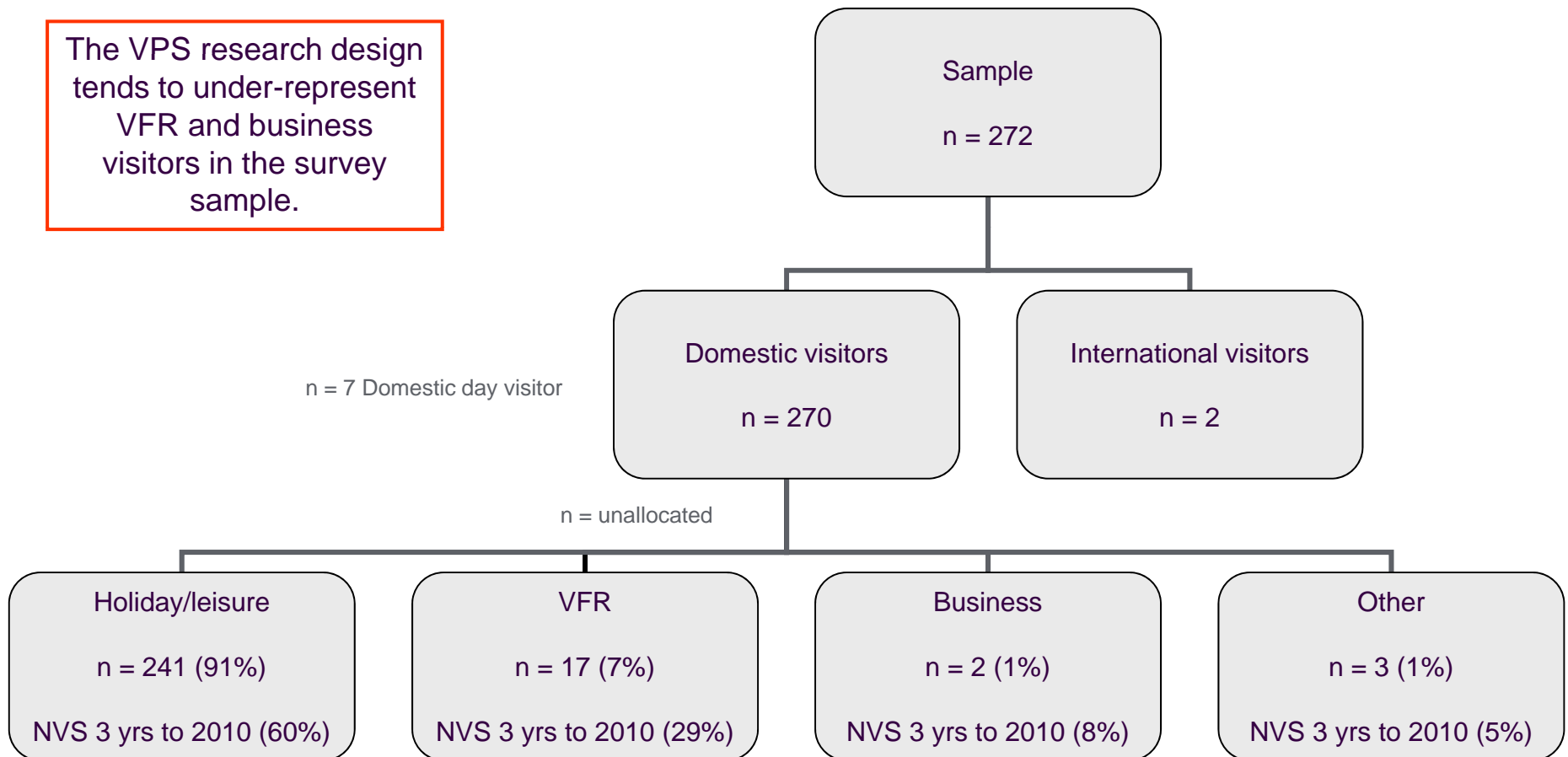
- 71 VPS projects have been completed in Australian regional tourist destinations - VPS Benchmark Database.
- Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents.
- Data are also compared with a 'subgroup' of destinations. The 'subgroup' includes:
 - Batemans Bay
 - Coffs Coast
 - Gippsland
 - Shoalhaven

Data collection



Survey sample

The VPS research design tends to under-represent VFR and business visitors in the survey sample.



NVS sample includes the Bega Valley Area and is the average for the March quarters.

Domestic overnight survey sample

		VPS Sample	NVS Sample
Age group	15 to 34 years	7%	16%
	35 to 54 years	62%	24%
	55+ years	32%	61%
Life stage	Young/midlife singles/couples	17%	13%
	Families	53%	18%
	Older singles/couples	30%	68%
Origin	NSW	36%	40%
	Vic	49%	37%
	ACT	9%	16%
	Other	6%	11%
Accommodation used	Commercial caravan or camping	54%	13%
	Friends/relatives property	6%	27%
	Hotel, resort, motel or motor inn	16%	37%
	Rented house, apartment, flat, unit	5%	18%

The VPS research design has overestimated visitors in the Family life stage and those staying in Commercial caravan or camping accommodation

NVS sample includes the Bega Valley Area and is the average for the March quarters 2008 to 2010

Visitor and trip characteristics



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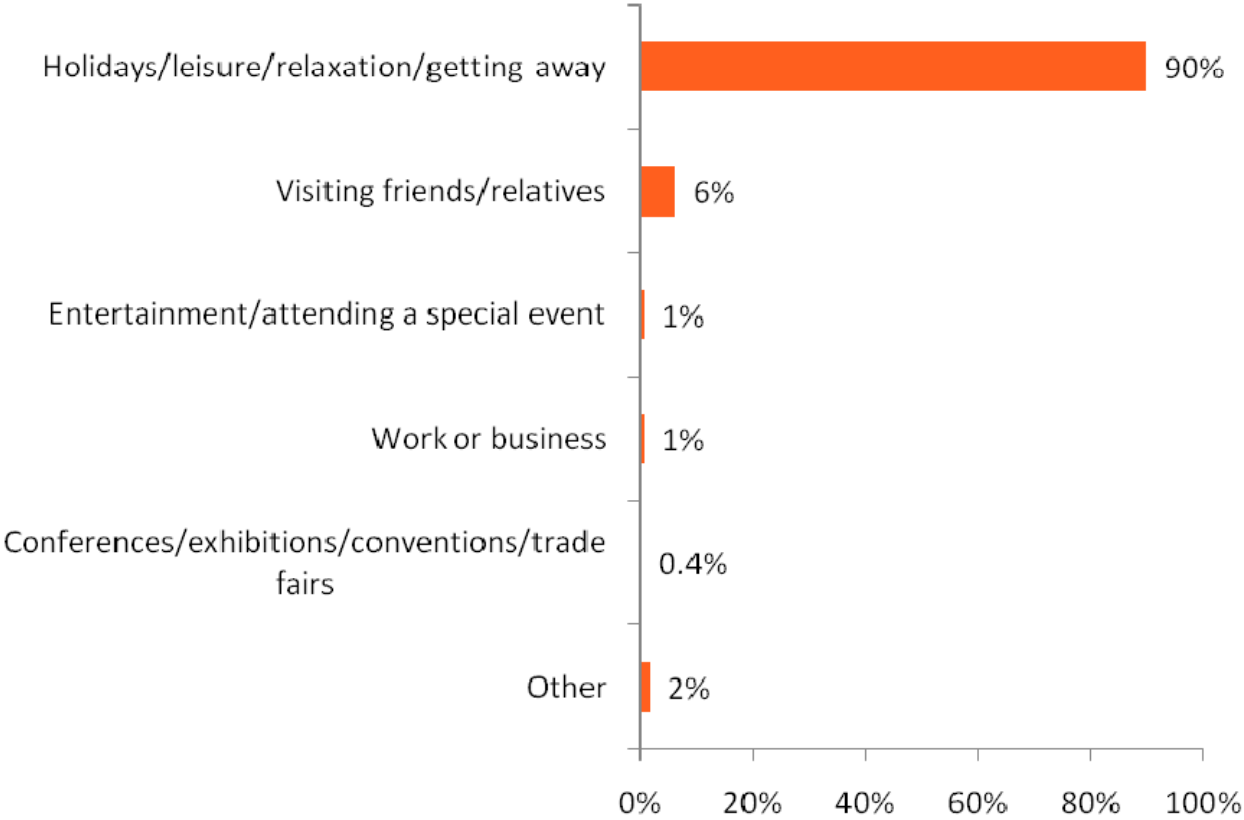


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Visitor profile (during the survey period)

- Trip purpose
- Age
- Travel party
- Origin

Over nine in ten visitors visited for holiday purposes, including entertainment

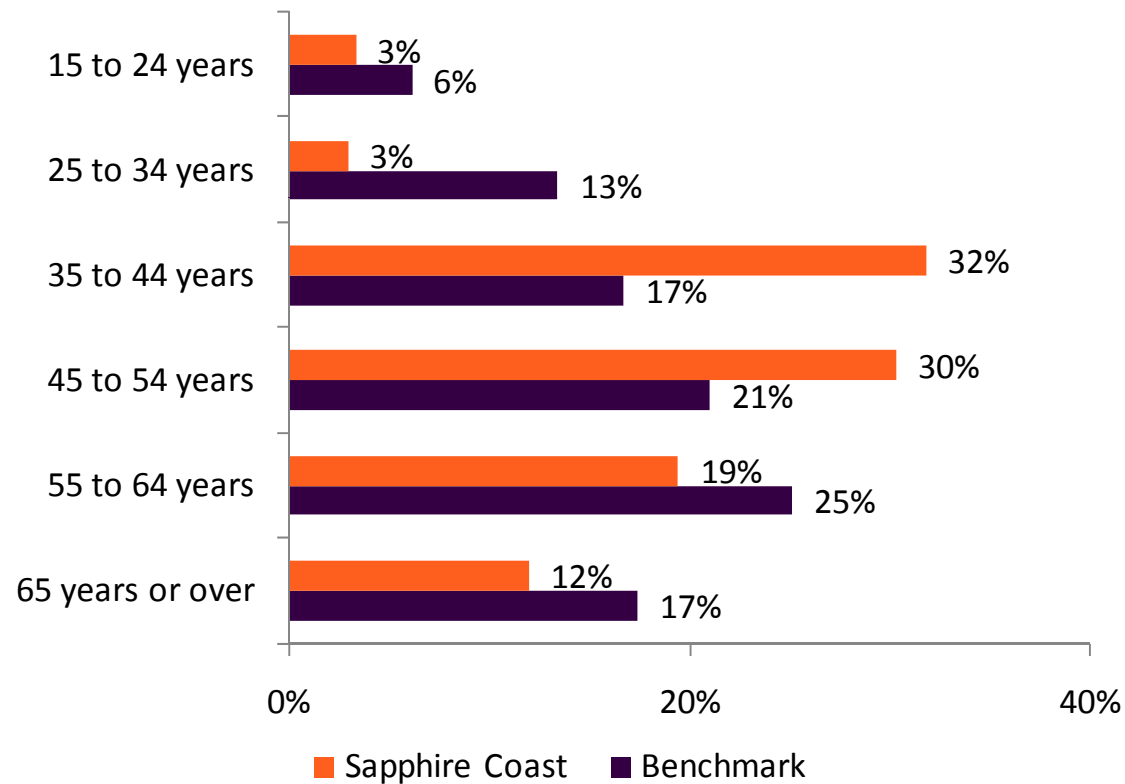


Purpose	Sapph	Subgroup	All
Holiday	91%	↑ 15%	↑ 14%
Visiting friends and relatives	6%	↓ -11%	↓ -7%
Business	1%	→ -2%	↓ -4%
Other	2%	→ -2%	↓ -4%

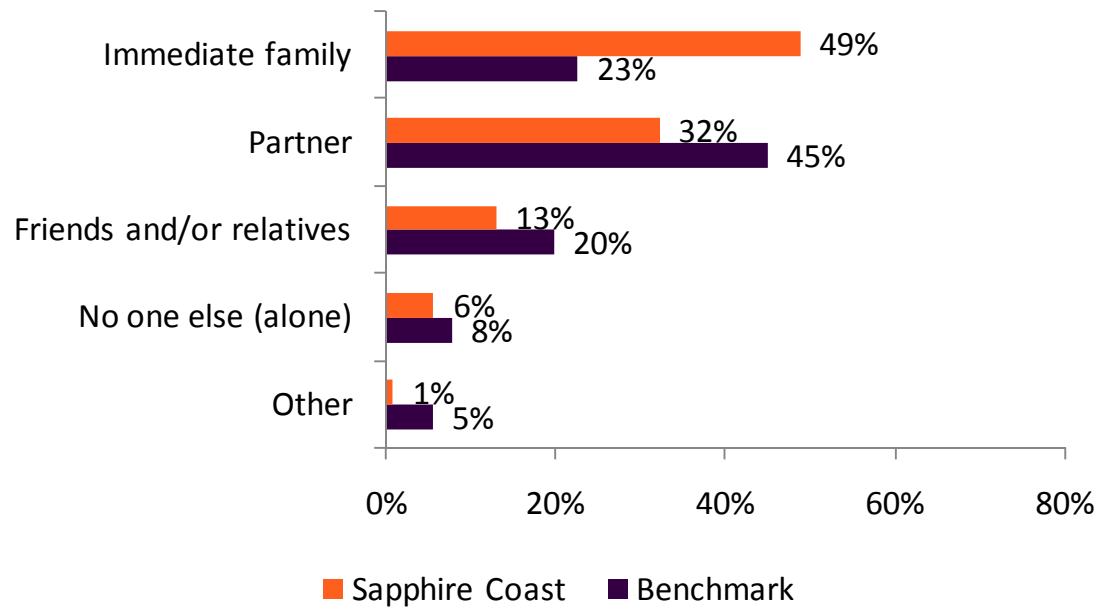
Base = 272

'What was the main purpose of the trip?'

A higher proportion of visitors were 35 to 54 years compared with the benchmark



Visitors were more likely to travel with their immediate family compared with the benchmarks

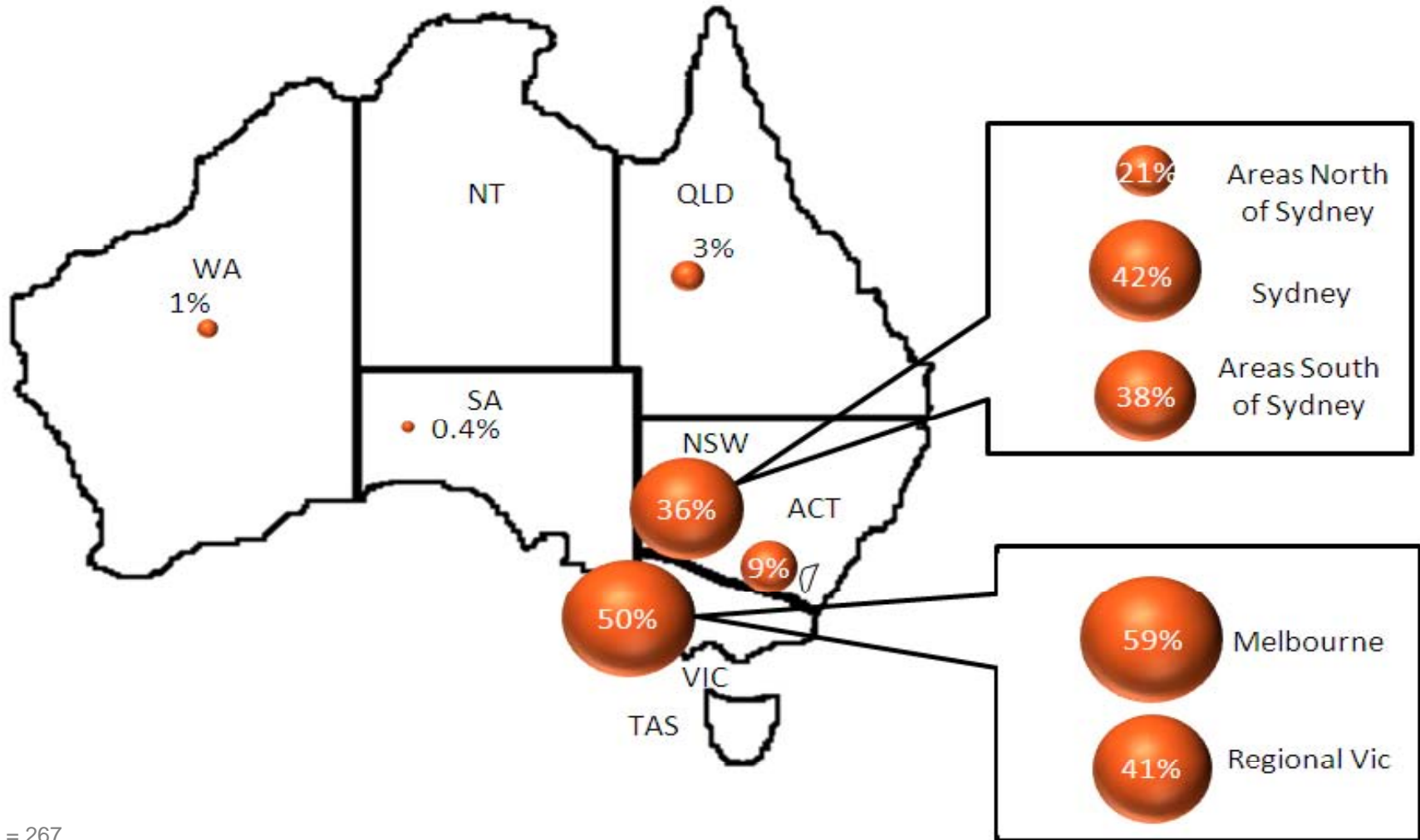


Travel Party	Sapph	Subgroup	All
Alone	6%	➡ 1%	➡ -2%
Couple	32%	⬇ -16%	⬇ -13%
Family	49%	⬆ 20%	⬆ 26%
Friends or relatives	13%	⬇ -4%	⬇ -7%
Other	1%	➡ -1%	⬇ -5%

Base = 271

“How would you describe your travel party, that is, all persons with whom you directly travelled and shared most expenses? Travelled with ...”

Over six in ten visitors were from areas outside of NSW, mainly Victoria



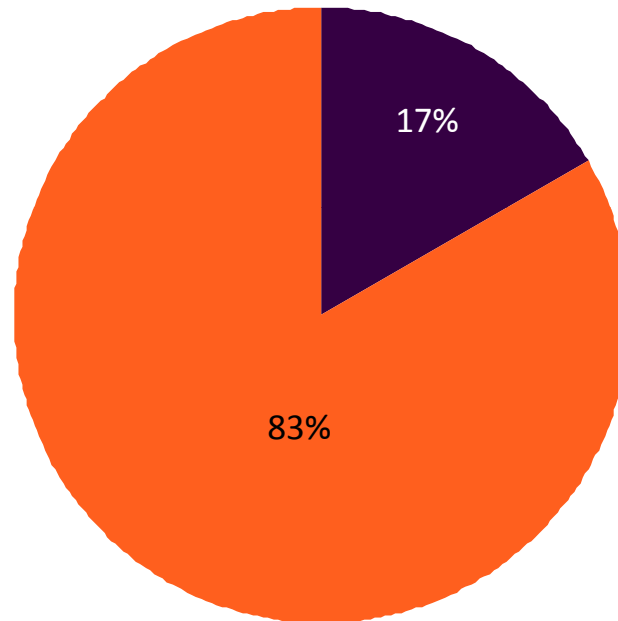
Base = 267

*"In which State or Territory do you reside?"
"What is your home postcode"*

Trip planning and booking

- Past visitation
- Planning period
- Information sources
- Booking information

Over four in five visitors were repeat visitors



- First (Benchmark = 32%)
- Return (Benchmark = 68%)

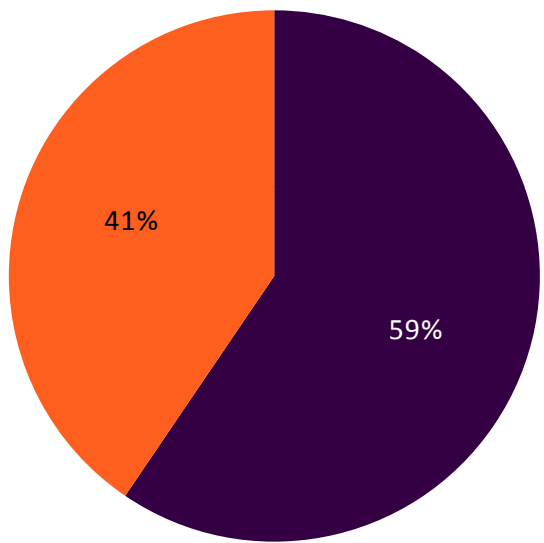
Base = 272

"Was this the first time you had visited the Sapphire Coast including both day trips and overnight trips?"

Profile of visitors by first/repeat visitor

	First time visitor (17%)	Repeat visitor (83%)
35 to 54 years	61% (n = 44)	62% (n = 223)
Family life stage	57% (n = 44)	64% (n = 223)
Travel with immediate family	49% (n = 45) 27% travelled with partner	49% (n = 226) 33% travelled with partner
Interstate	60% (n = 43)	64% (n = 224)
Length stay in region (Nights)	Mean = 6 Median = 5 (n = 45)	Mean = 12 Median = 8 (n = 226)

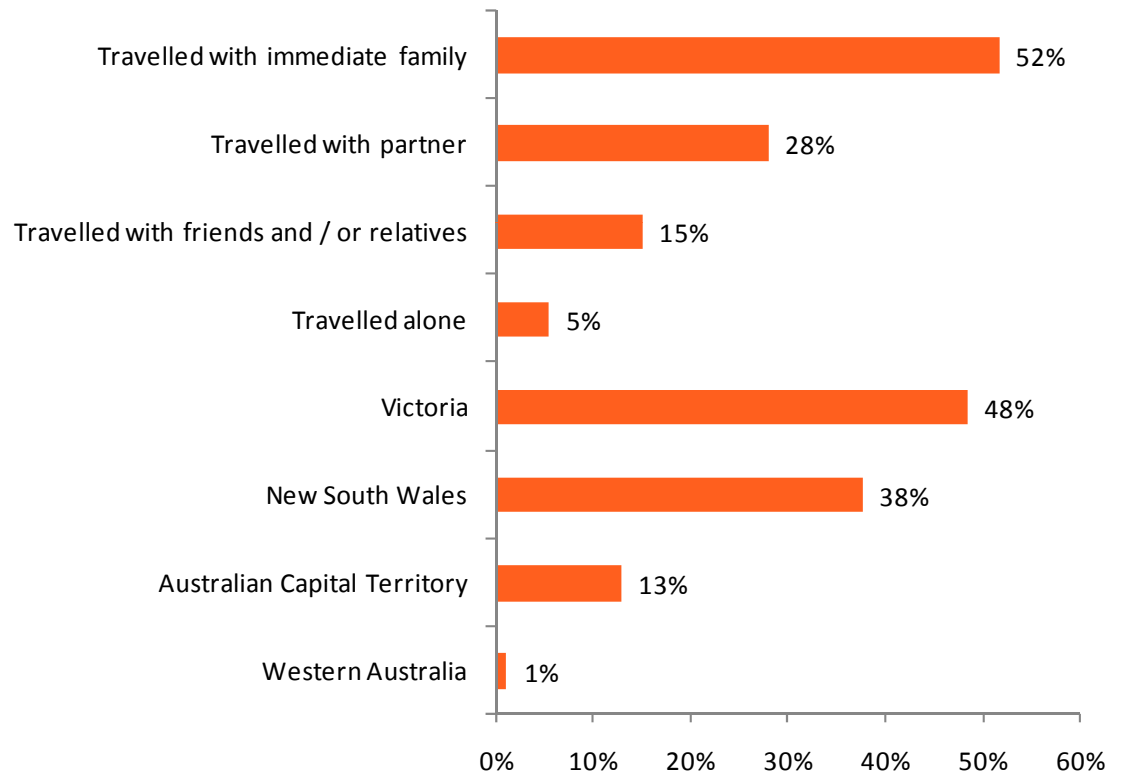
Three in five have visited the region outside of Summer – mainly families travelling together and visitors from Victoria



■ Visited outside summer period
■ Have not visited outside summer period

Base = 158

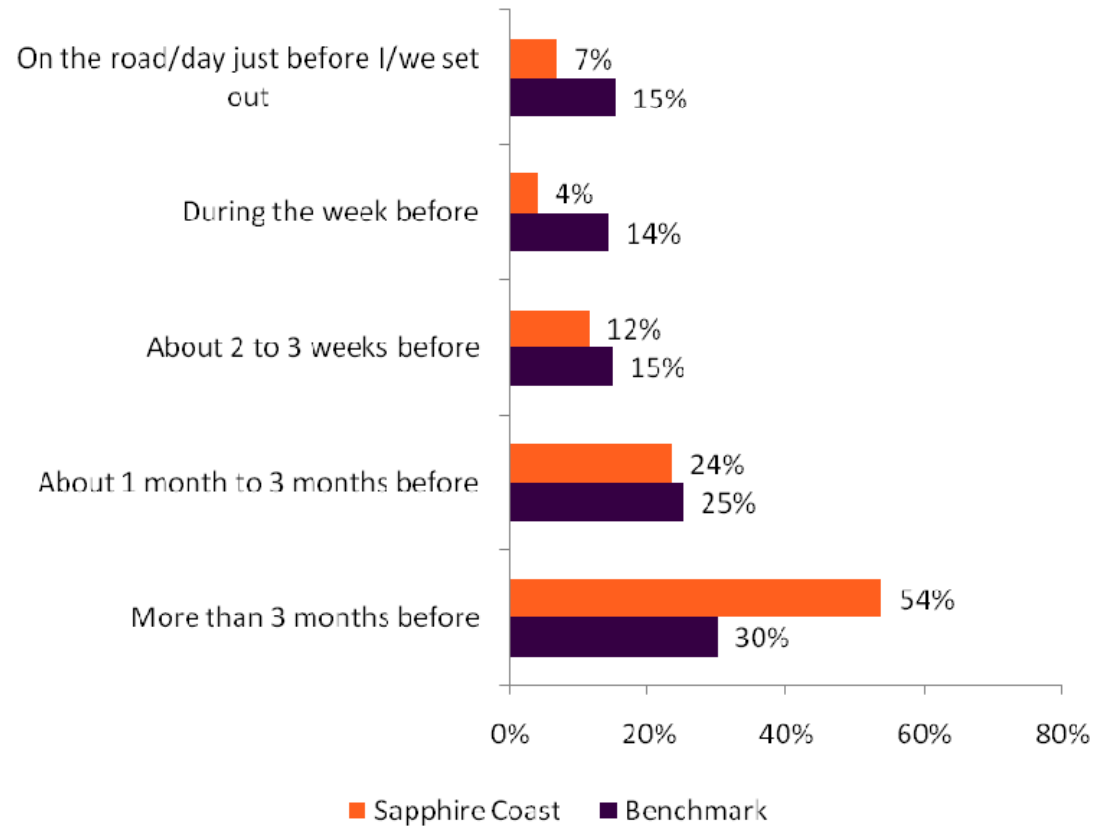
“Have you visited the Sapphire Coast for a holiday outside the summer period during Autumn, Winter or Spring?”



Base =93

*“In which State or Territory do you reside?”
 “How would you describe your travel party, that is, all persons with whom you directly travelled and shared most expenses? Travelled with ...”*

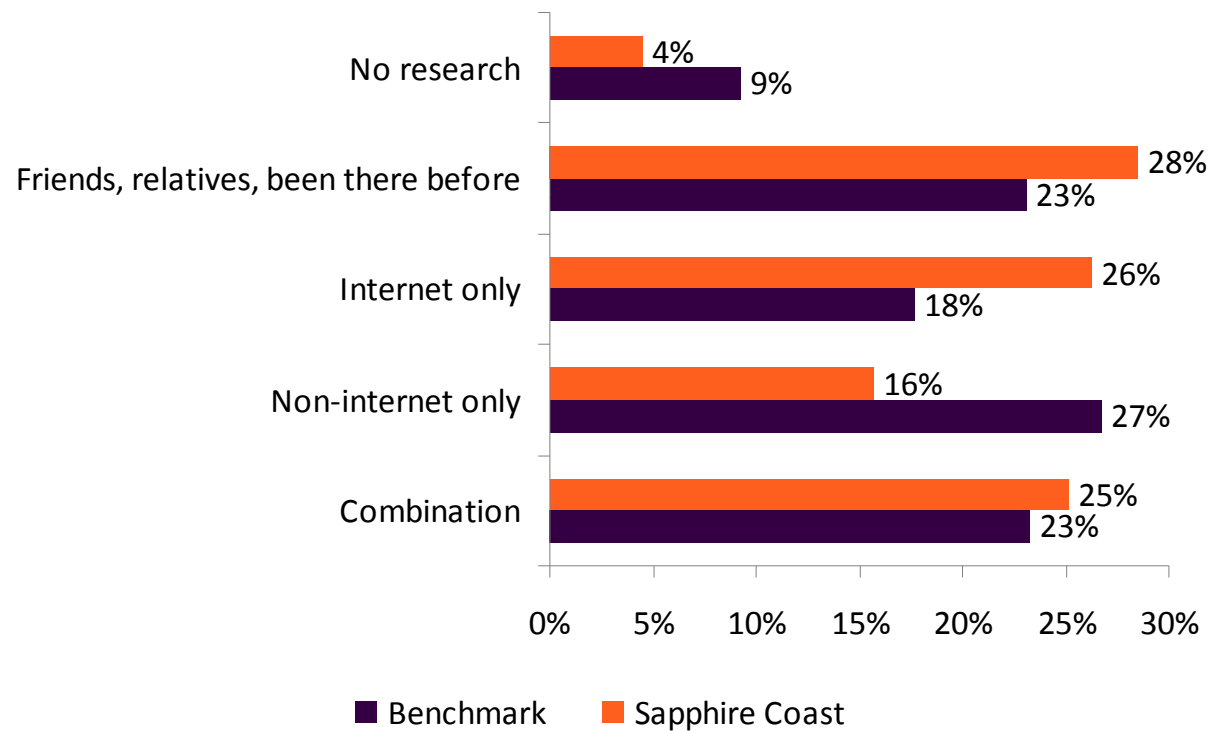
The majority of visitors planned more than 3 months in advance



Trip Planning	Sapph	Subgroup	All
On the road	4%	↓ -5%	↓ -5%
In the month before	19%	↓ -20%	↓ -17%
1 to 3 months	24%	→ -2%	→ -2%
More than 3 months	54%	↑ 27%	↑ 24%

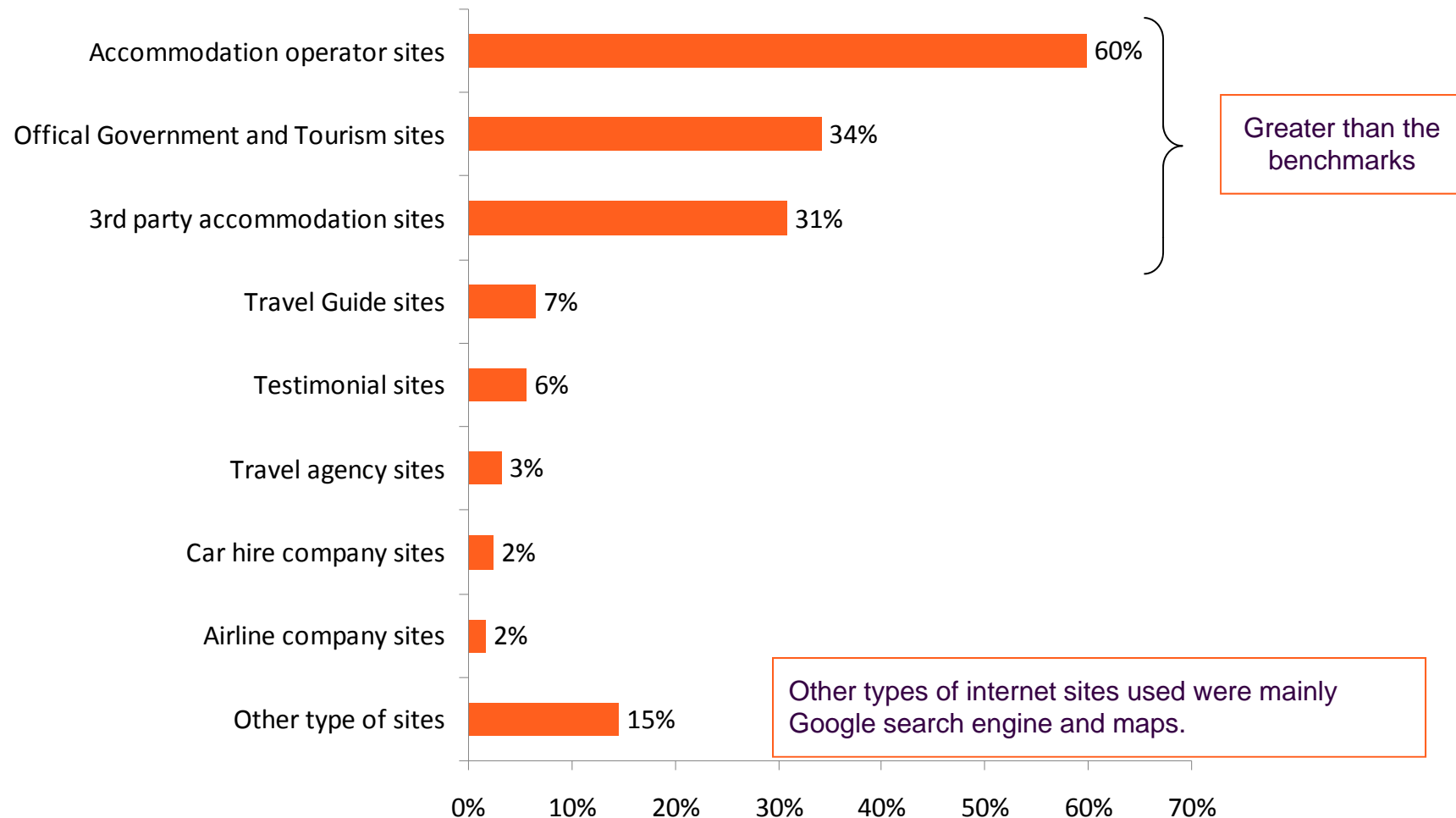
"When was the decision made to visit the Sapphire Coast?"

The majority of visitors only used their previous experience and/or the internet only



Note: 'Friends, relatives, been there before' may be used in combination with other categories (excludes 'No research')

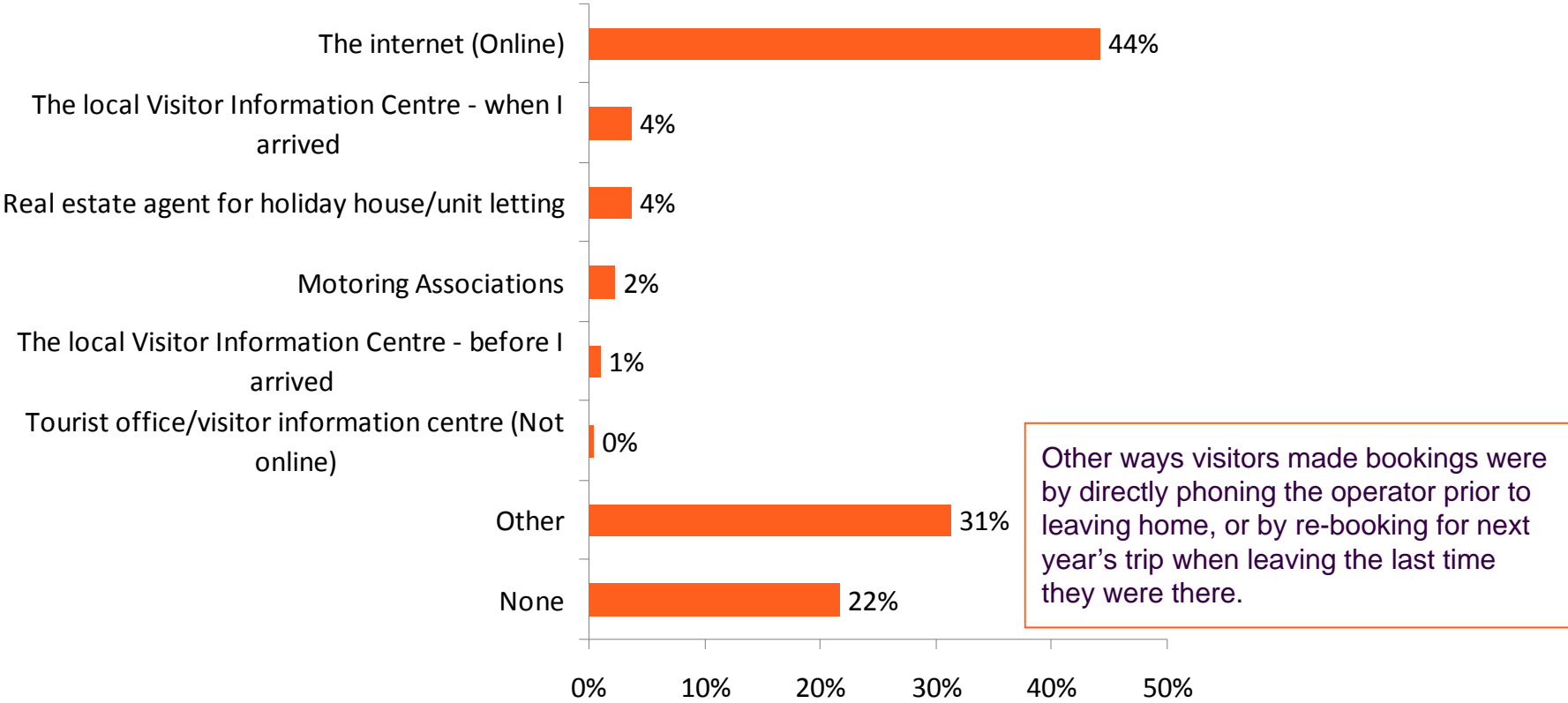
Accommodation operator sites were the most popular source for information



Base = 123

'You mentioned that you used the internet for research. What are the type of websites you went to?'

The internet was the most popular source for booking

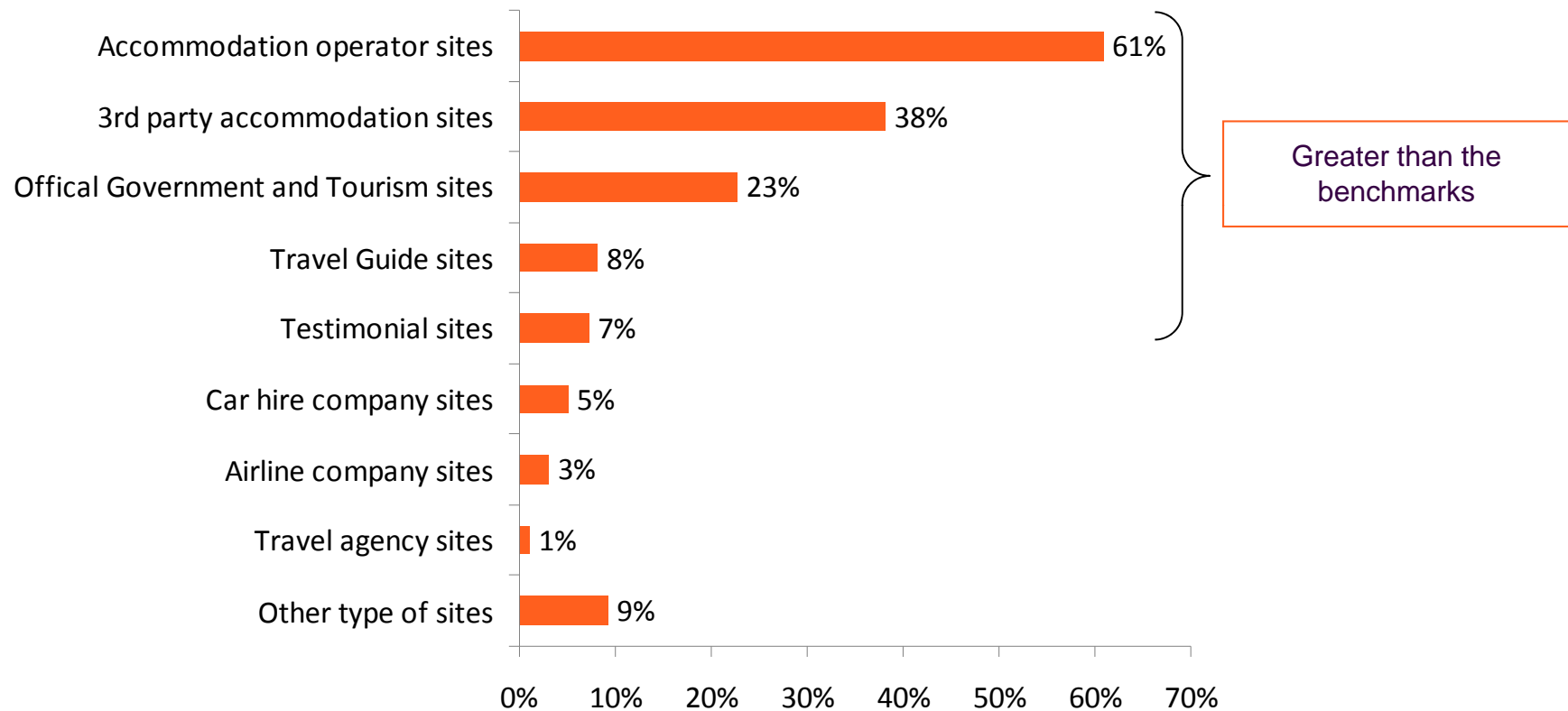


Prior bookings - Internet sites	Sapph	Subgroup	All
No prior bookings made on internet	56%	↓ -13%	↔ 0%
Prior Bookings - Non internet	Sapph	Subgroup	All
No prior bookings made	22%	↓ -16%	↓ -15%

Base = 217

'Which of the following did you use to make bookings for this trip to the Sapphire Coast?'

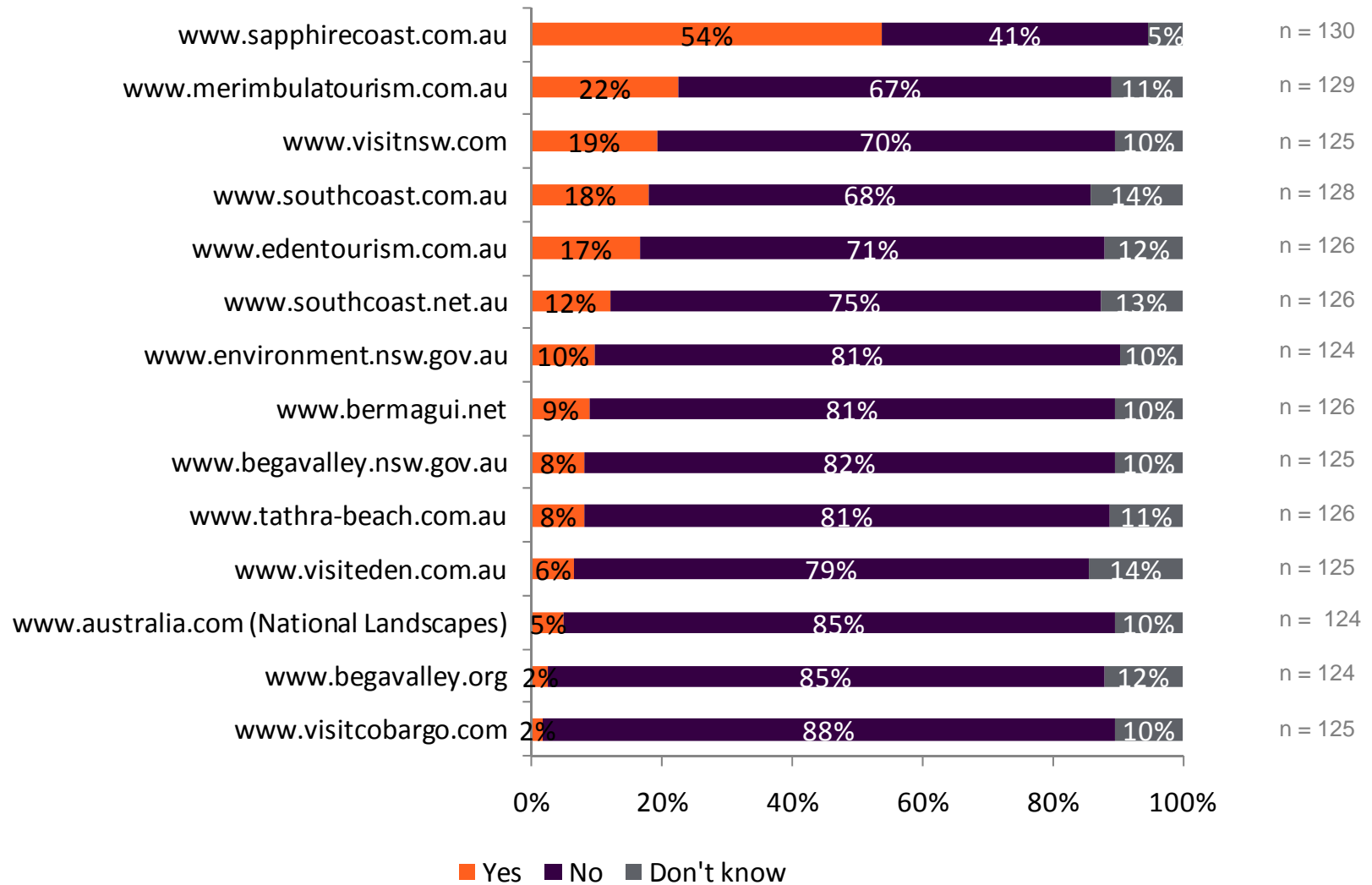
Accommodation operator sites were the most popular sites for booking



Base = 97

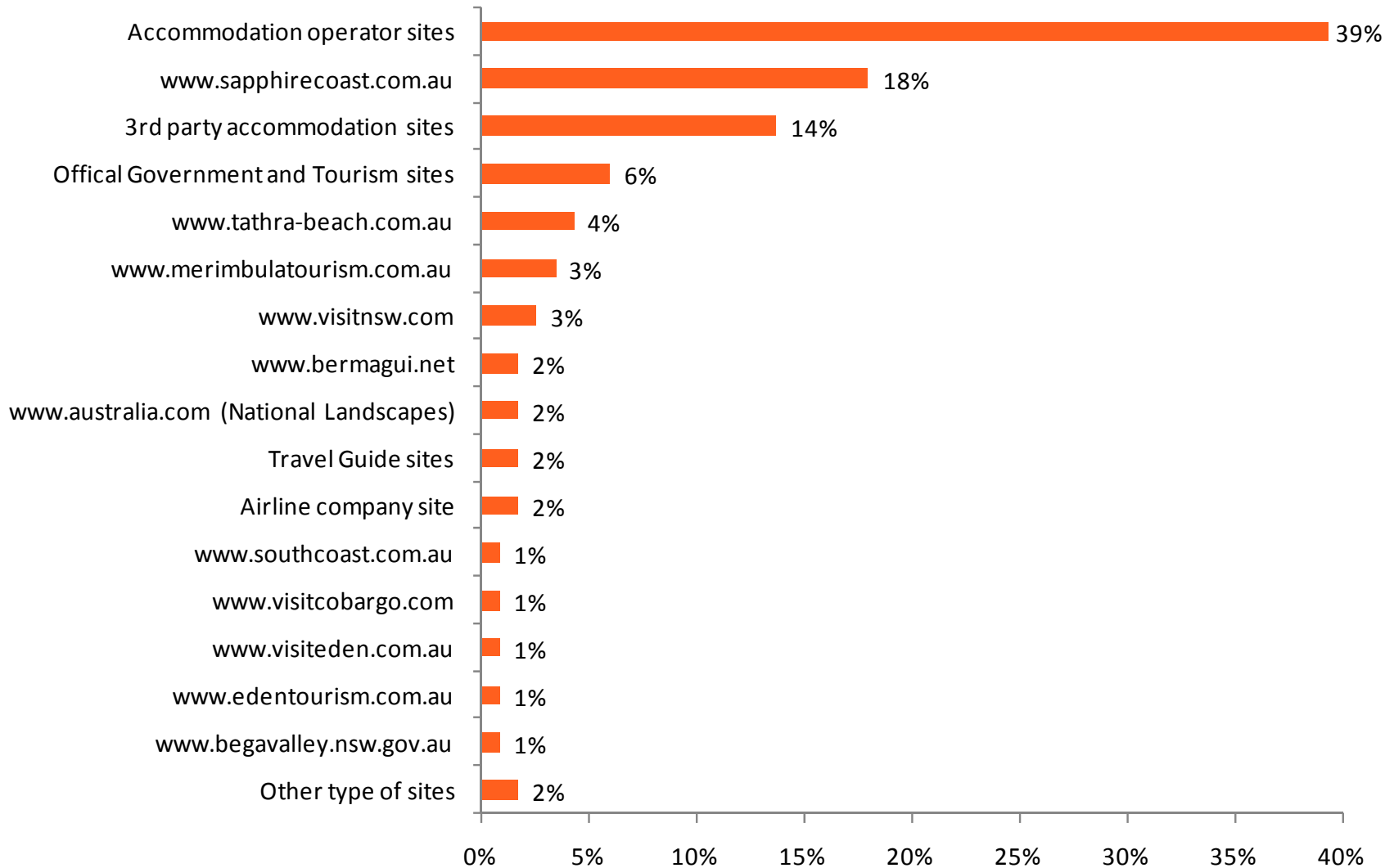
'You mentioned that you used the internet for booking. What are the type of websites you went to?'

Over half of visitors used sapphirecoast.com.au



"Did you use any of the following specific websites prior to your trip to the Sapphire Coast?"

Accommodation operator sites were the most useful sites



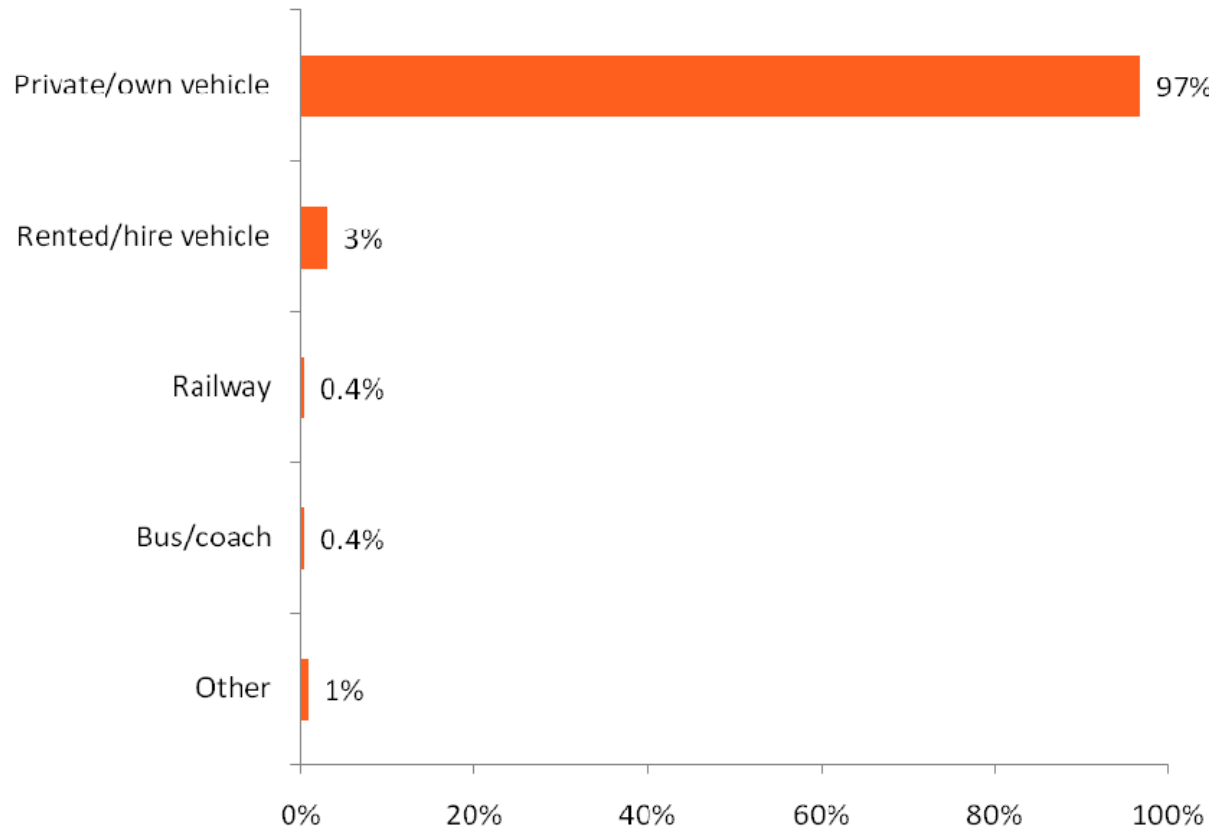
Base = 117

"Of the websites you used prior to your trip to the Sapphire Coast, which did you find most useful?"

Getting to and around the Sapphire Coast

- Transport used
- Locations visited

The majority of visitors to the region were self drive



Other Characteristics

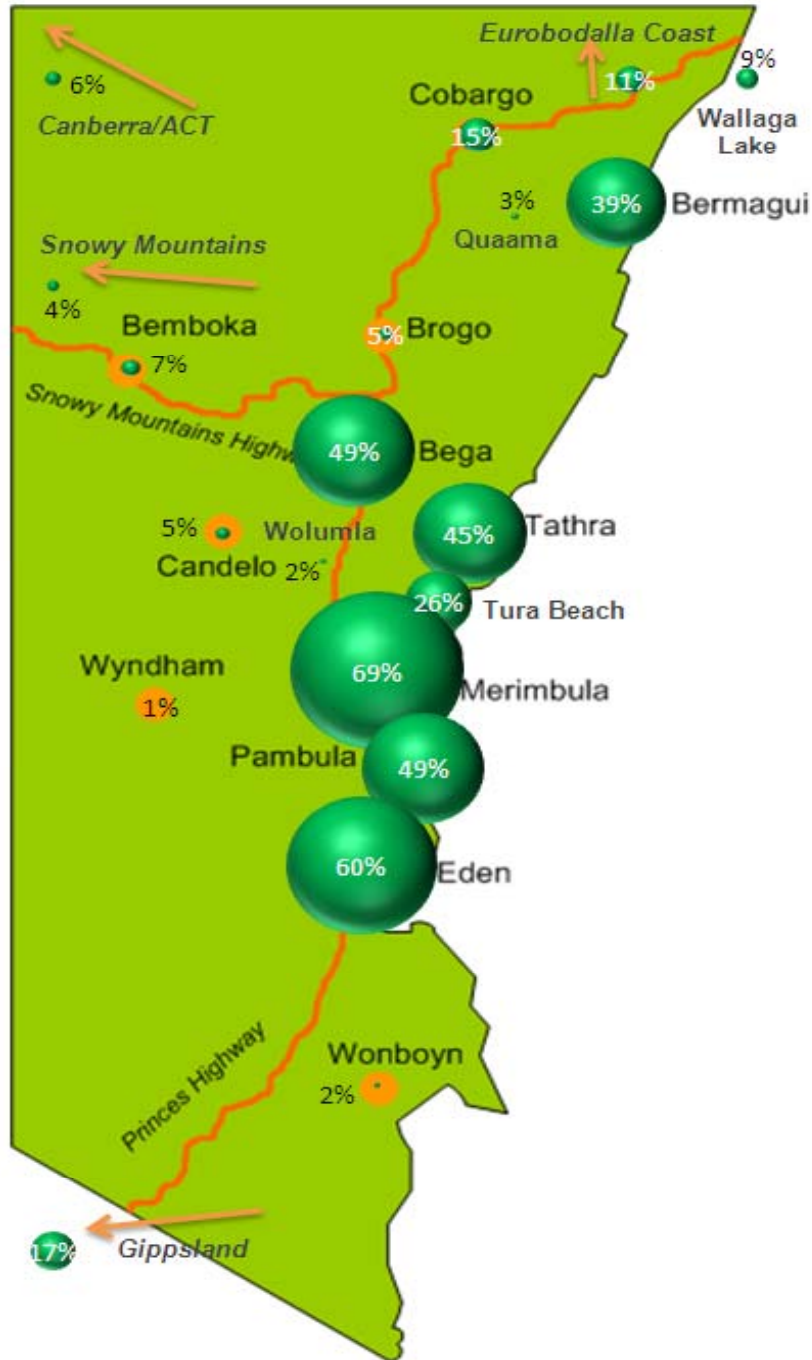
Self drive

99% ↑ 9% ↑ 19%

Base = 272

"What was the main form of transport that you used to get to the Sapphire Coast?"

Towns visited during trip – towns stopped at

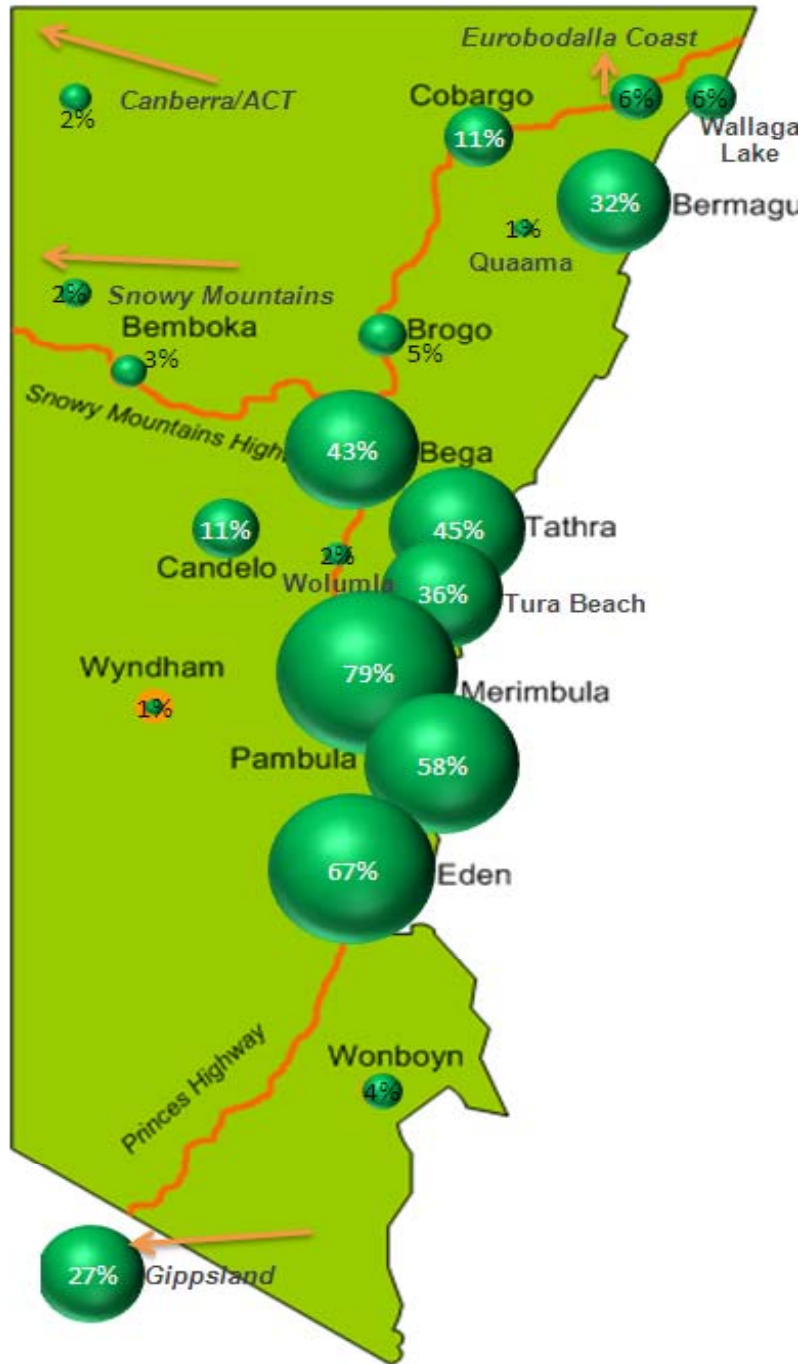


Median Number of Stops in the Sapphire Region = 4

Base = 272

“On this trip which, if any, of the following towns did you visit?”

Towns visited during trip – towns stopped at by visitors from Victoria

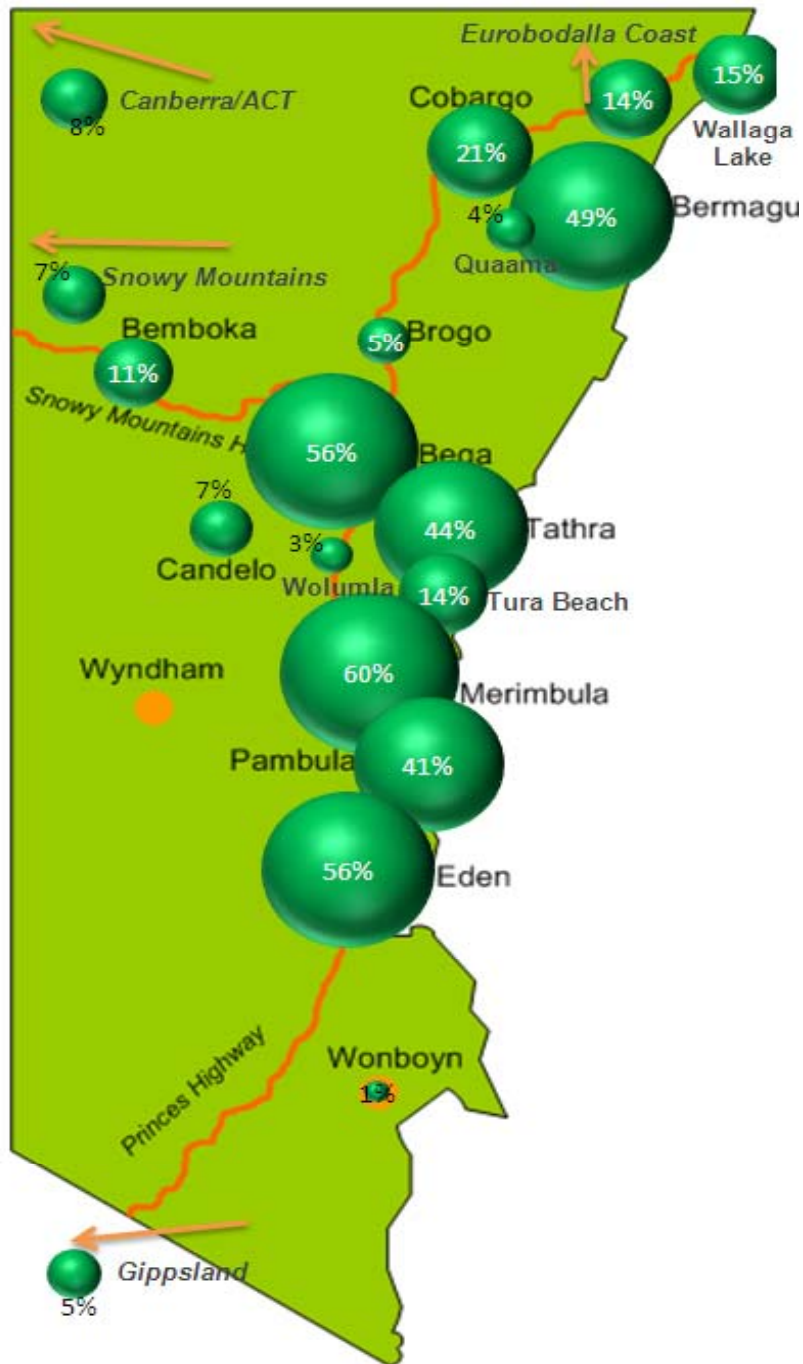


Median Number of Stops in the Sapphire Region = 4

Base = 133

“In which State or Territory do you reside?”
 “On this trip which, if any, of the following towns did you visit?”

Towns visited during trip – towns stopped at by visitors from New South Wales



Base = 97

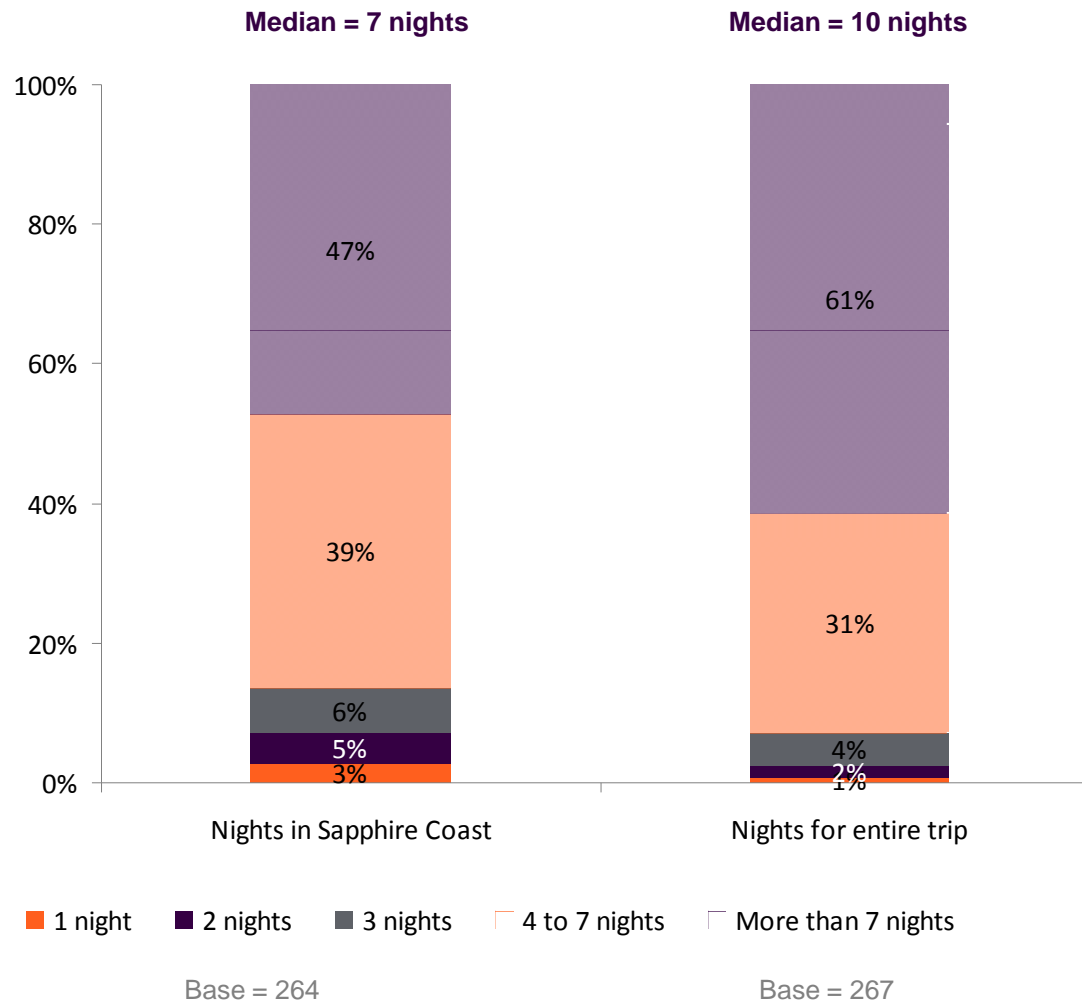
Median Number of Stops in the Sapphire Region = 4

“In which State or Territory do you reside?”
 “On this trip which, if any, of the following towns did you visit?”

Staying in the Sapphire Coast

- Length of stay
- Accommodation used

The majority of visitors stayed at least 4 nights in the region

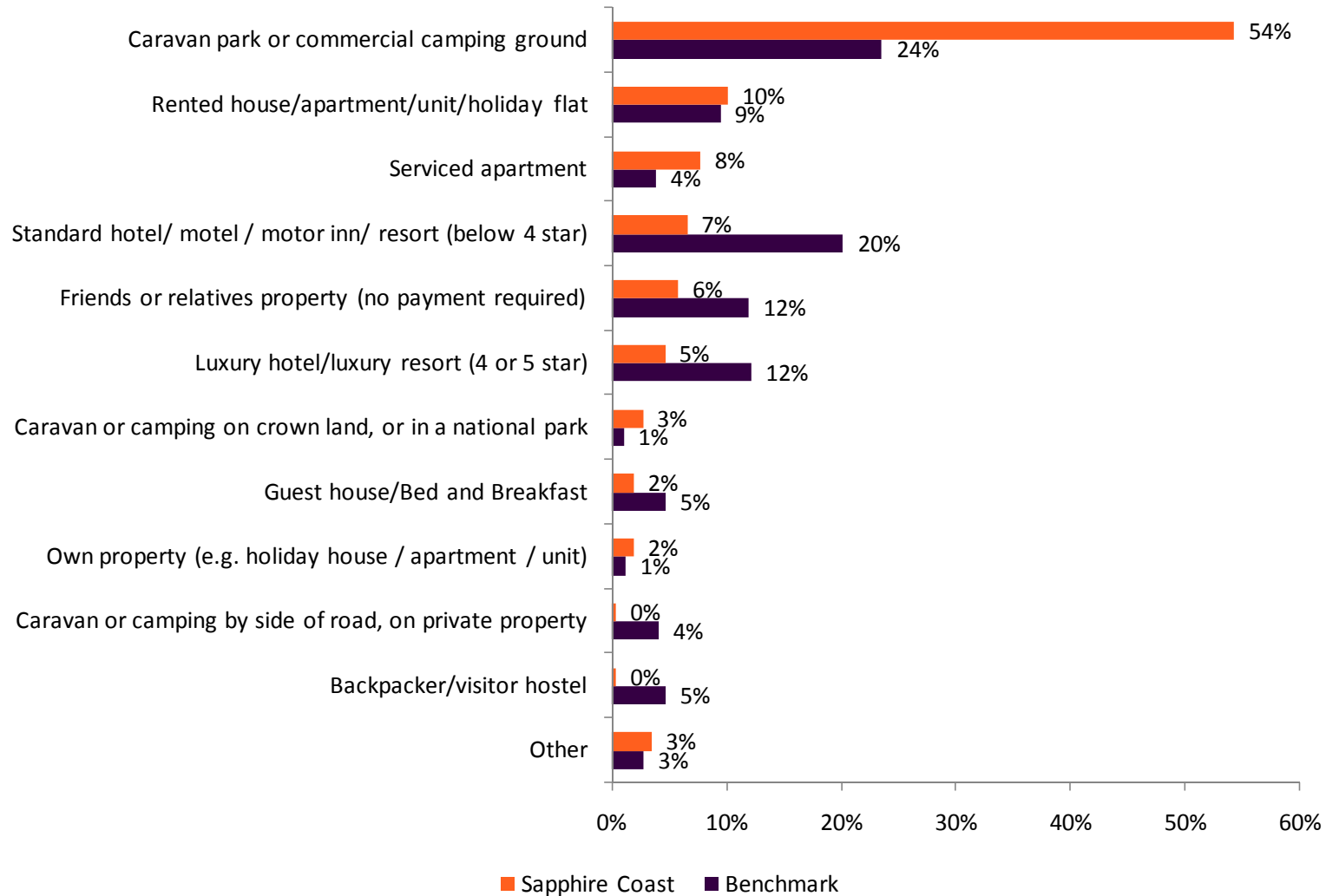


97% of visitors to the region stayed at least one night.

“How many nights did you stay in the Sapphire Coast during this trip?”

“In total, how many nights did you stay away from home for your entire trip?”

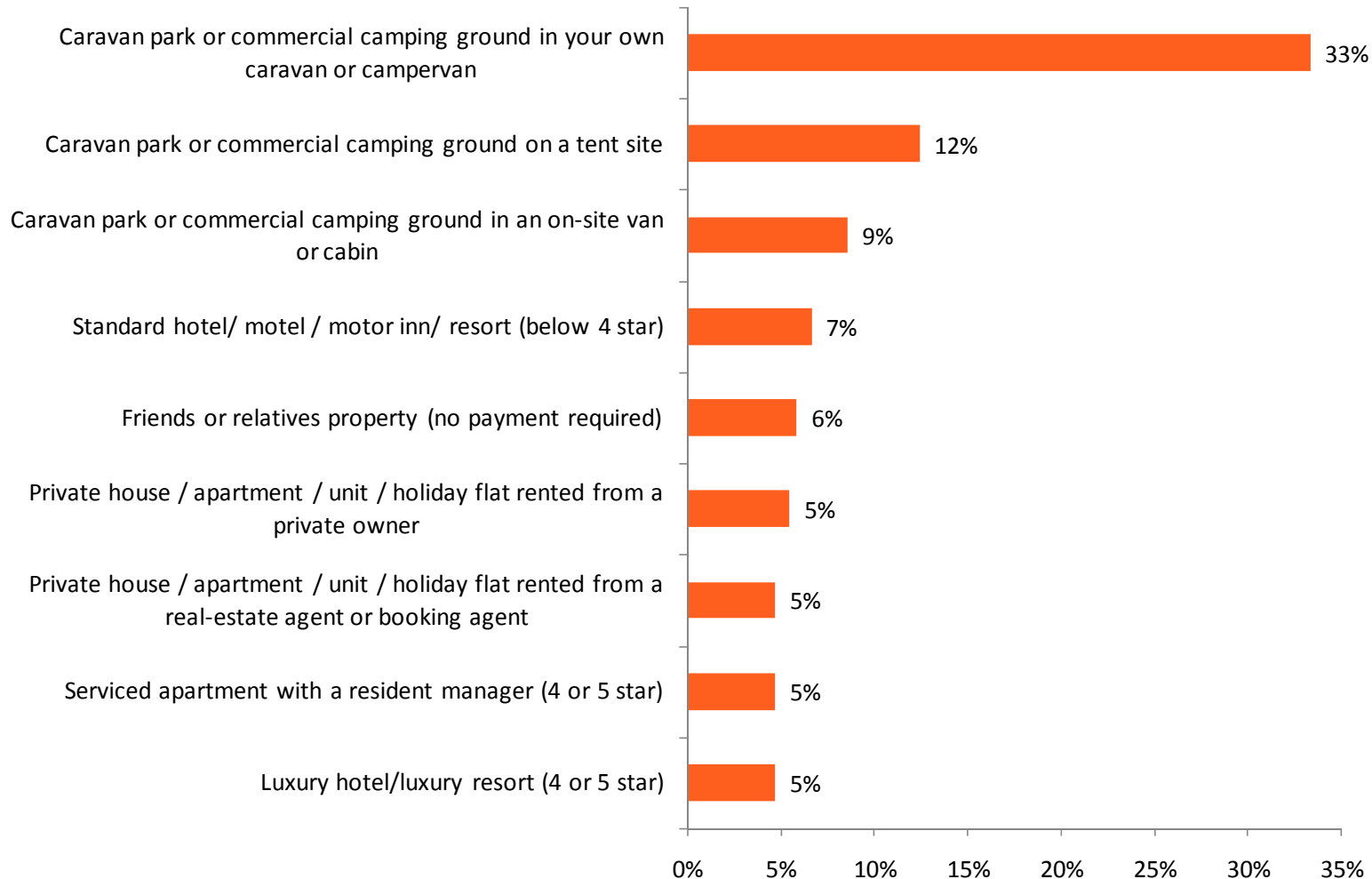
Over half of visitors stayed at commercial caravan or camping grounds



Base = 258

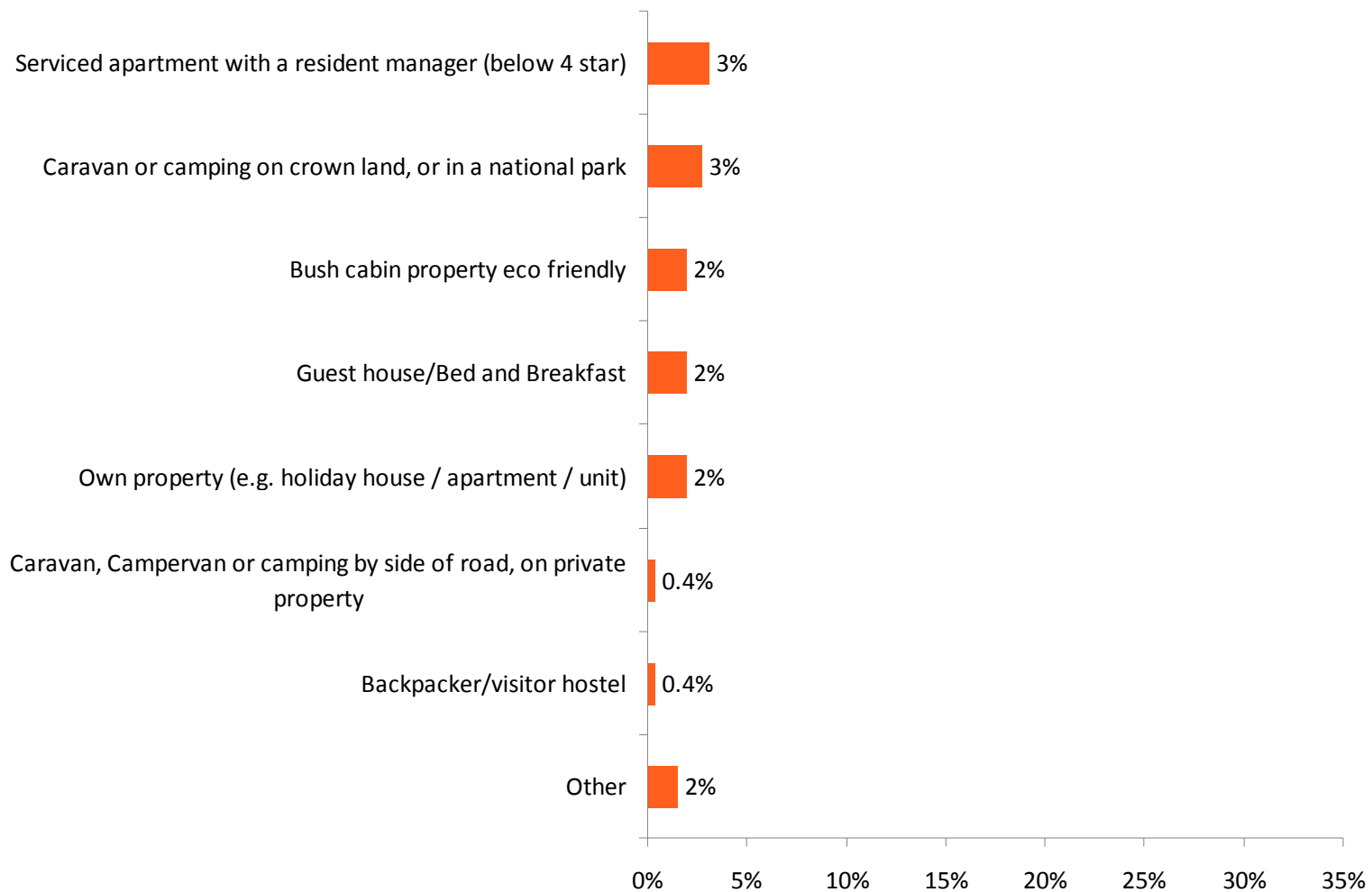
“What type of accommodation did you mainly use in the Sapphire Coast?”

A third of visitors stayed in their own van at a commercial caravan or camping ground



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Base = 258

"What type of accommodation did you mainly use in the Sapphire Coast?"

Profile of different accommodation users

	Commercial caravan or camping in: Own van (33%)	Commercial caravan or camping in: Tent site (12%)	Commercial caravan or camping in: On site van or cabin (9%)
35 to 54 years	52% (n = 86) 45% 55+ years	78% (n = 32*)	68% (n = 22*)
Family life stage	60% (n = 85)	84% (n = 32*)	77% (n = 22*)
Travel with immediate family	42% (n = 86) 44% travelled as a couple	61% (n = 31*)	68% (n = 22*)
Interstate	70% (n = 83)	69% (n = 32*)	64% (n = 22*)
Repeat visitor	93% (n = 86)	81% (n = 32*)	73% (n = 22*)
Length stay in region (Nights)	Mean = 17 Median = 14 (n = 86)	Mean = 8 Median = 6.5 (n = 32*)	Mean = 8 Median = 7 (n = 22*)

Base = 258

* Small base

Profile of different accommodation users

	Hotel, motel, resort (Standard or luxury) (11%)	Rented house/ apartment (10%)	Serviced apartment (8%)
35 to 54 years	54% (n = 28*) 29% 55+ years	84% (n = 25*)	70% (n = 20*)
Family life stage	29% (n = 28*) 57% older life stages	81% (n = 26*)	75% (n = 20*)
Travel with immediate family	17% (n = 29*) 48% travelled a a couple	62% (n = 26*)	65% (n = 20*)
Interstate	39% (n = 28*)	54% (n = 26*)	80% (n = 20*)
Repeat visitor	69% (n = 29*)	73% (n = 26*)	85% (n = 20*)
Length stay in region (Nights)	Mean = 4 Median = 3 (n = 29*)	Mean = 8 Median = 7 (n = 26*)	Mean = 9 Median = 7.5 (n = 20*)

Base = 258
* Small base

Summary: Visitor and trip characteristics

- Family life stage travelling with their family
- Visitors from Victoria and New South Wales
- Repeat visitors (stay longer)
- Planned well in advance
- Previous experience and the internet used for information
- Bookings through internet - Accommodation operator sites
- Differences in towns stopped at between Victoria and New South Wales visitors
- Stayed at Commercial caravan or camping grounds – own van

Why they visited the Sapphire Coast and were they happy



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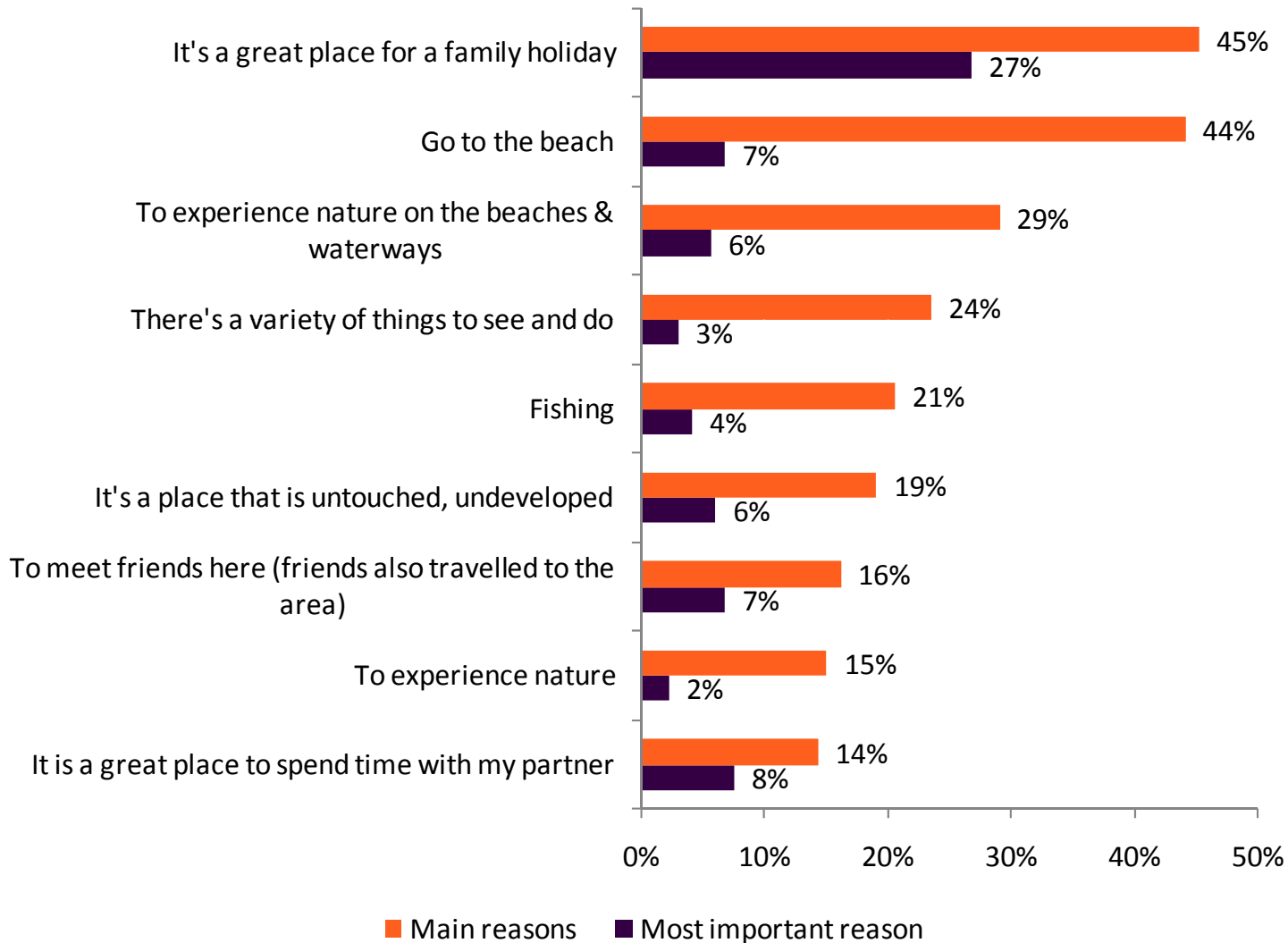


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Reasons for visiting the Sapphire Coast

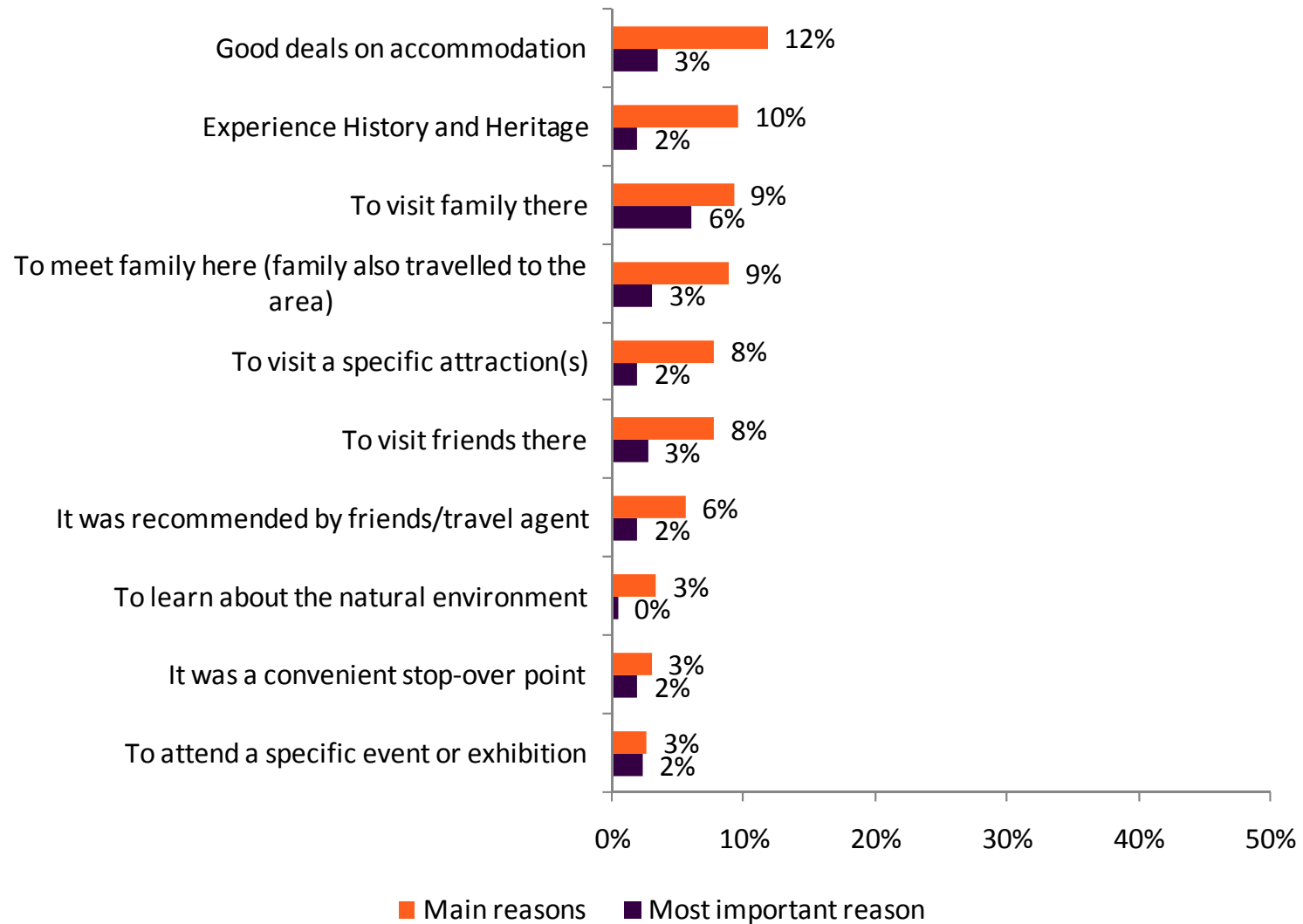
- Reasons for choosing destination
- Expectations of experiences

Reasons for visiting revolved around family, friends and beaches as well as the variety of things to see



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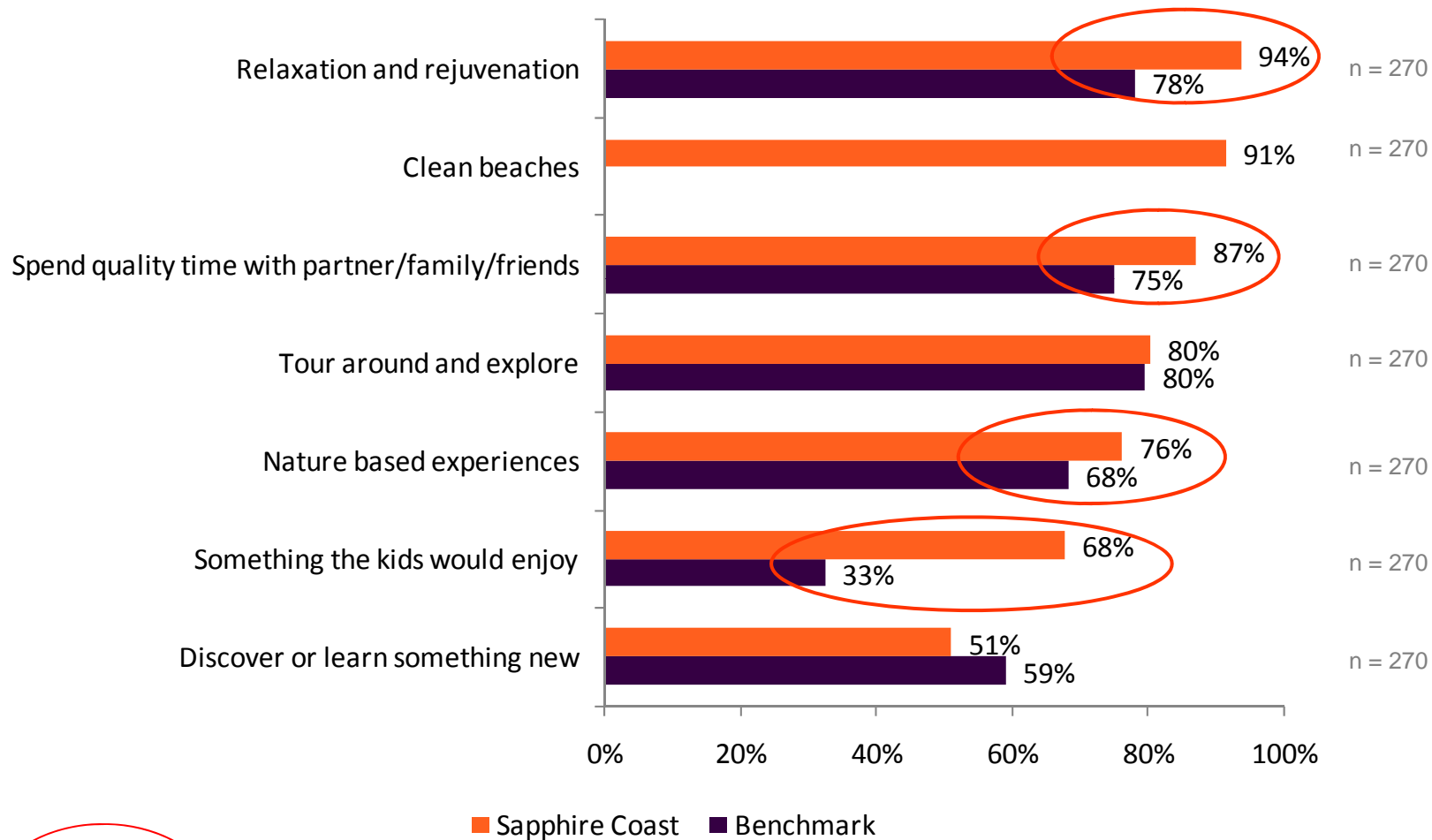
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Bases: All respondents Main Reason = 272
All respondents Most important = 265

"Why did you chose the Sapphire Coast?"
"Which of the following was most important in choosing the Sapphire Coast?"

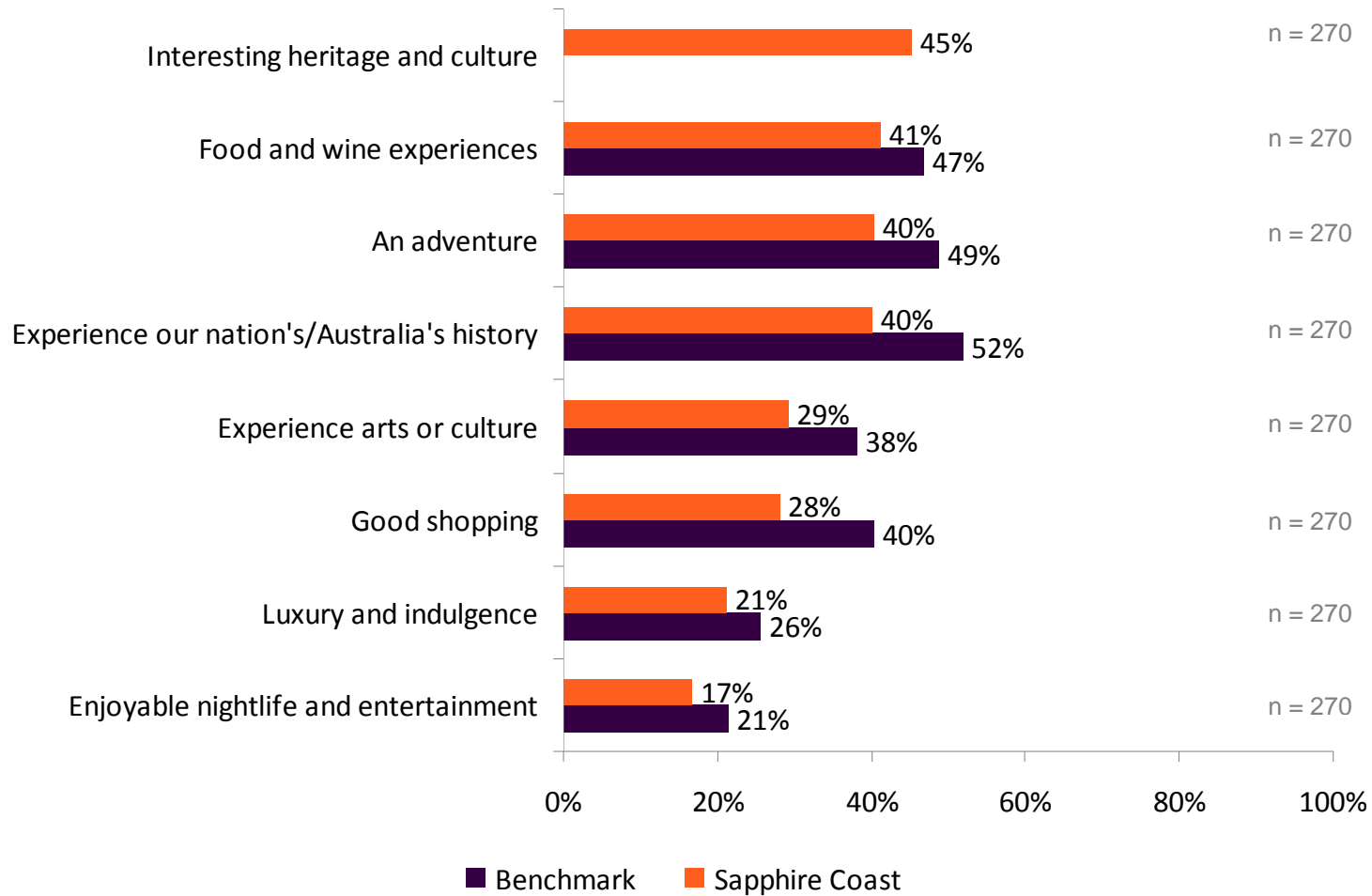
Expectations for relaxing, spending time with others, nature and something for the kids were above the benchmark



Greater than the VPS benchmark

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"Which, if any, of the experiences listed below did you expect the Sapphire Coast to offer?"

Beautiful beaches and scenery

'We were very impressed with the beaches and national parks. The information provided about the national parks was excellent' (45-54 years, repeat visitor)

'Beautiful unspoilt destination that oozes natural beauty and a local friendly atmosphere.' (34-45 years, repeat visitor)

'Pristine beaches that remain unmarked by development.' (35-44 years, first time visitor)

'The beautiful coastline, the inlets to explore, the food, the culture and the people. It's a wonderful part of the world. We are going back!!!!.' (65 years or more, repeat visitor)

"What else about the Sapphire Coast were you particularly happy with on your recent visit?"

Overall cleanliness of the area

'Eden was a very clean town - very little rubbish on roads etc. Obvious civic pride. Modern facilities but still old world charm.' (45-54 years, repeat visitor)

'Cleanliness. Still the feeling of natural environment. Pristine beaches and waterways.' (65 years or more years, repeat visitor)

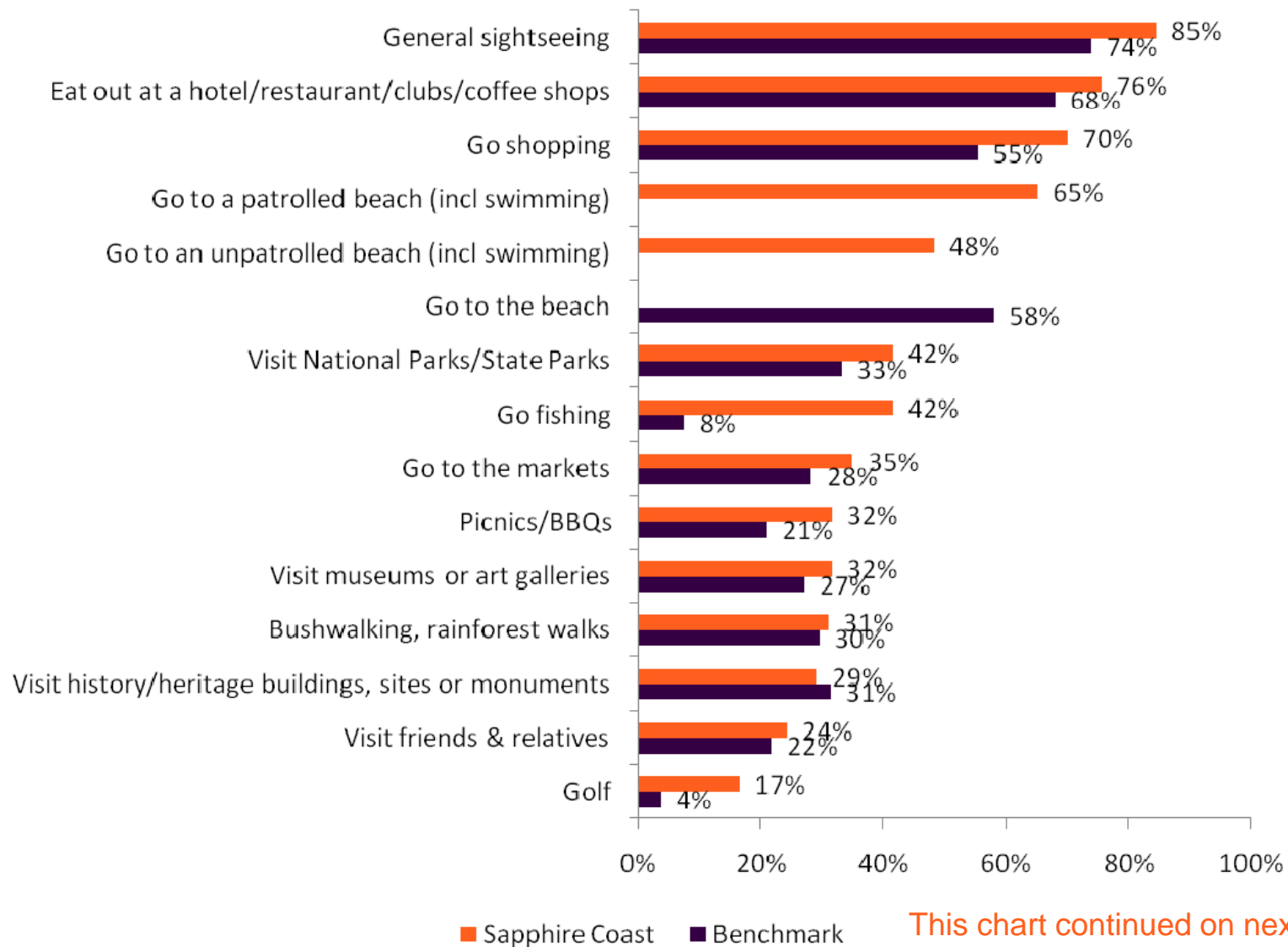
'How clean & clear the water at the beaches were' (45-54 years, repeat visitor)

'Clean and tidy areas, i.e. roadsides - no litter, information centre at Cobargo was excellent for service.' (55-64 years, first time visitor)

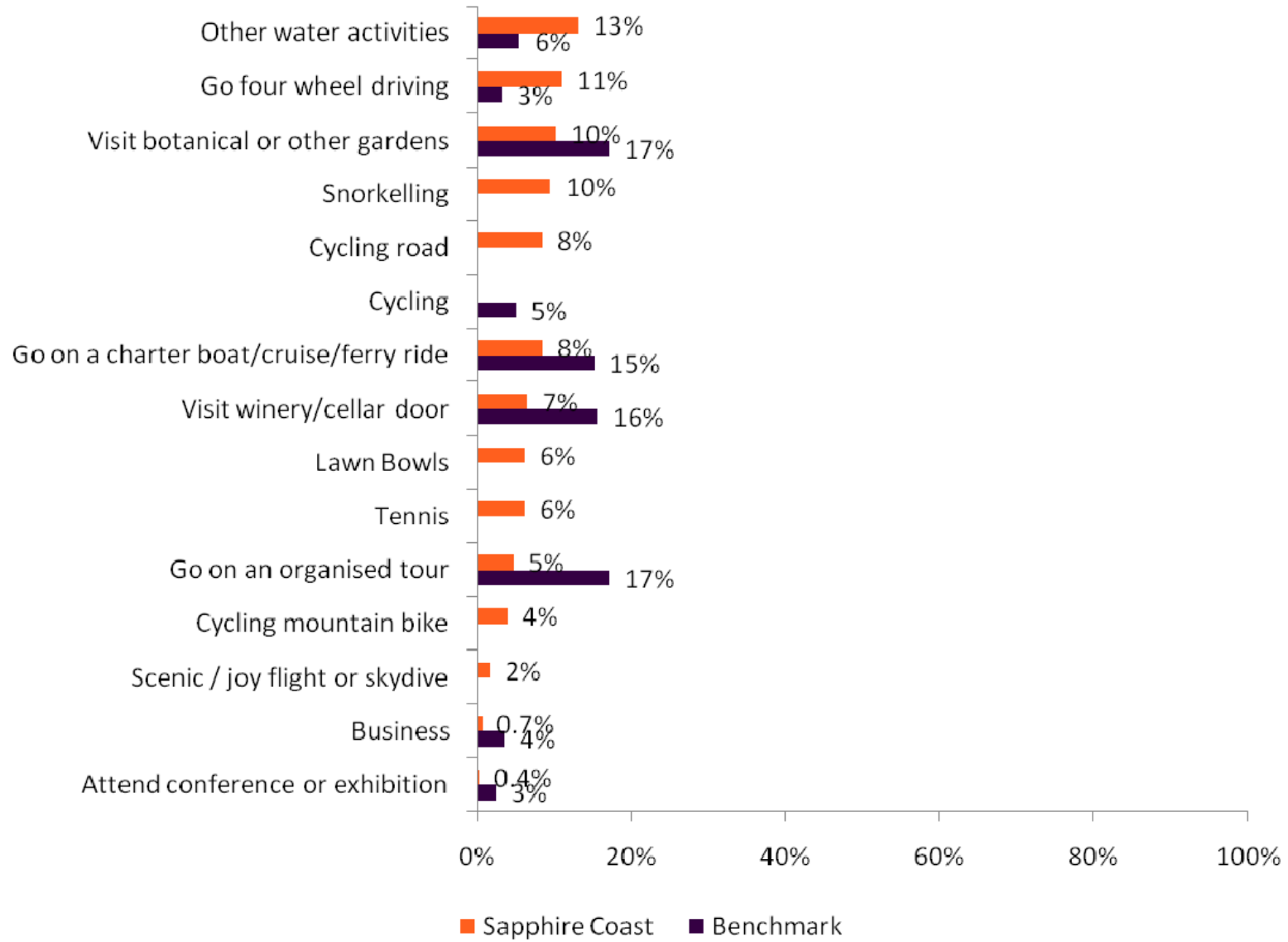
What did they do in the Sapphire Coast?

- Activities
- Attractions

More than four in five visitors went to the beach – patrolled or unpatrolled



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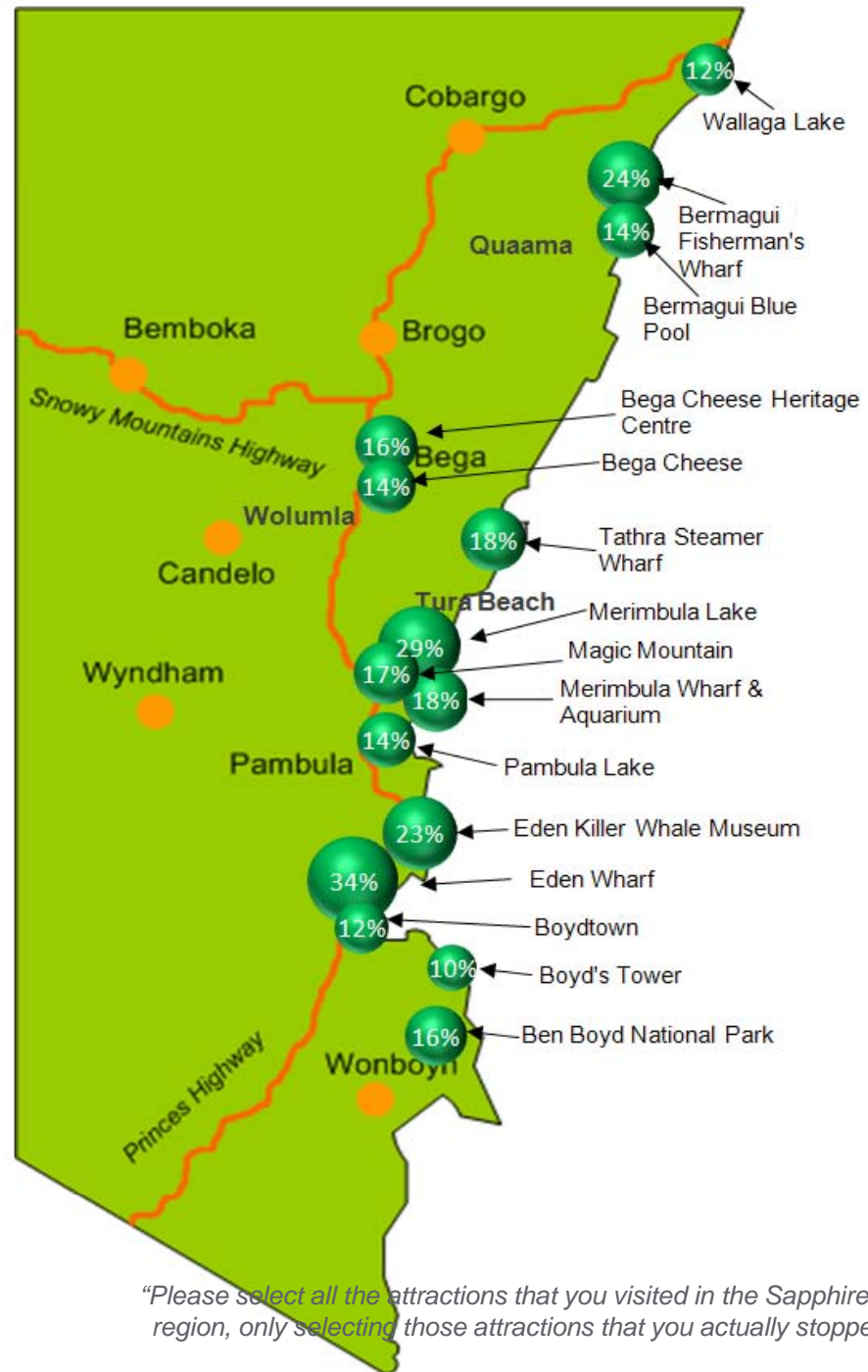
Base = 271

"On this trip to the Sapphire Coast, which of the following activities did you undertake?"

Attractions visited

Top 5

1. Eden Wharf (34%)
2. Merimbula Lake (29%)
3. Bermagui Fisherman's Wharf (24%)
4. Eden Killer Whale Museum (23%)
5. Merimbula Wharf and Museum and Tathra Steamer Wharf (18% each)



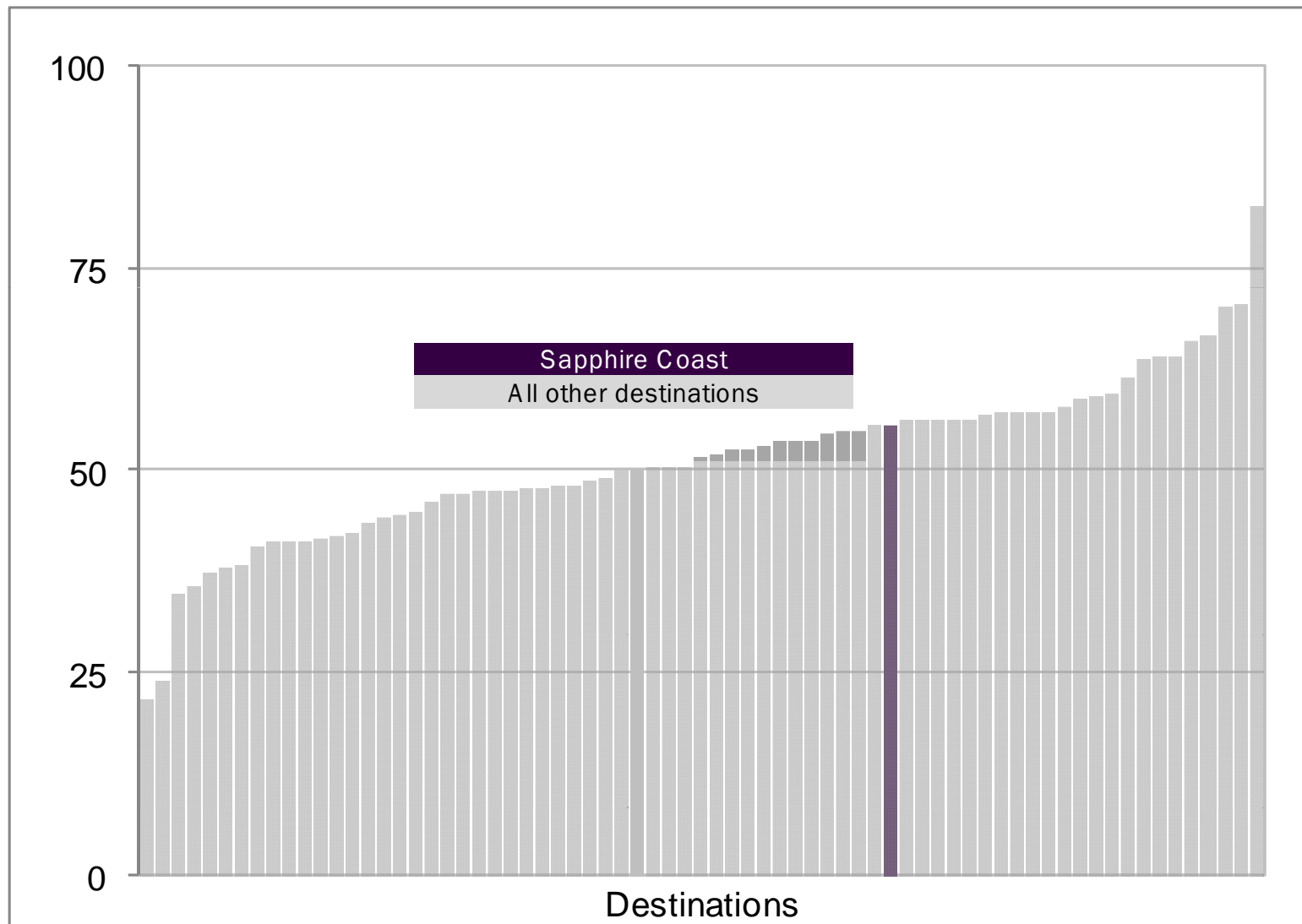
Base = 270

"Please select all the attractions that you visited in the Sapphire Coast region, only selecting those attractions that you actually stopped at."

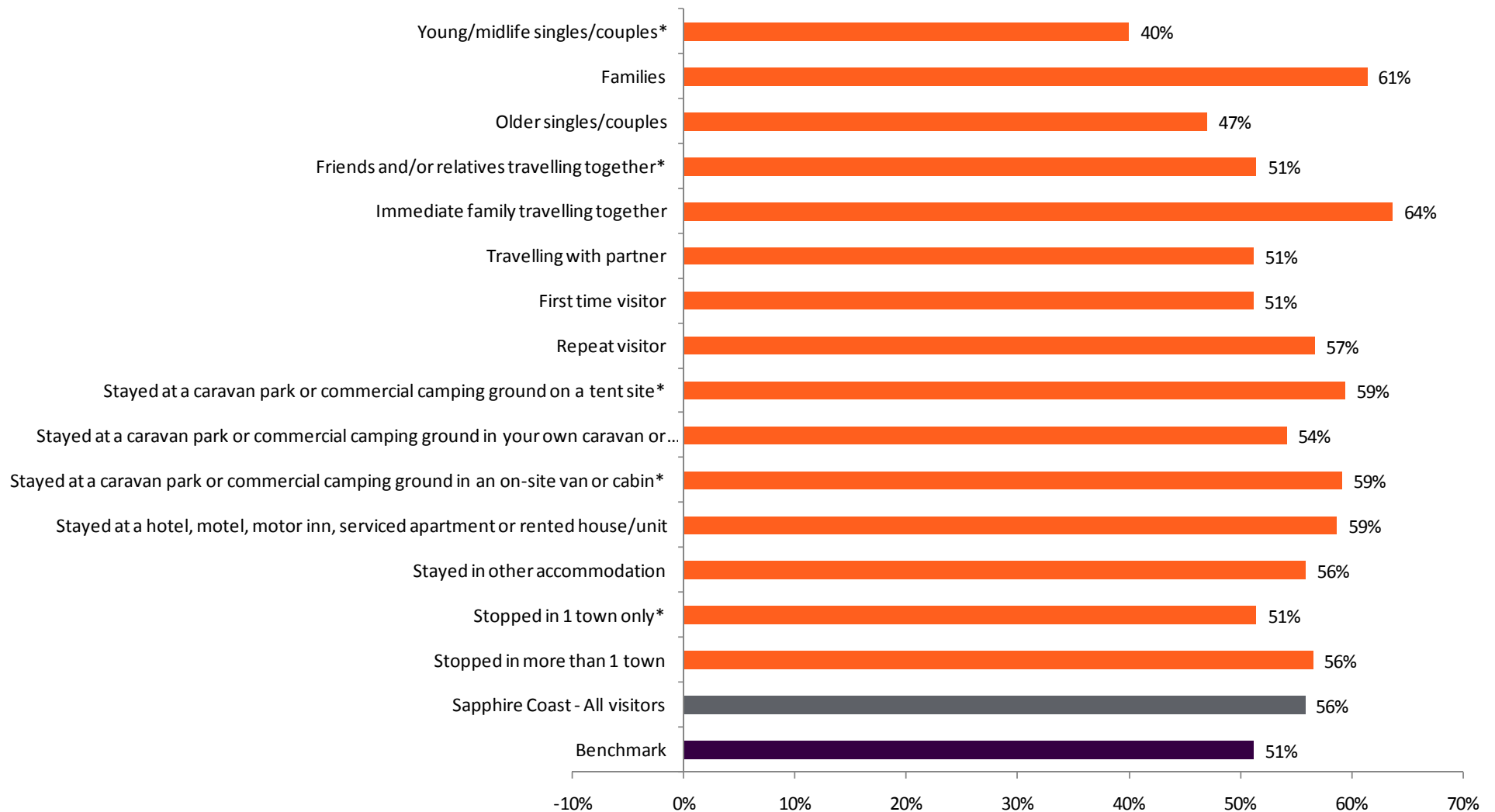
Visitor satisfaction in the Sapphire Coast

- Overall satisfaction
- Were expectations met
- Satisfaction with destination attributes

A higher proportion of visitors were very satisfied compared with the benchmarks



Overall satisfaction was very high for families travelling together



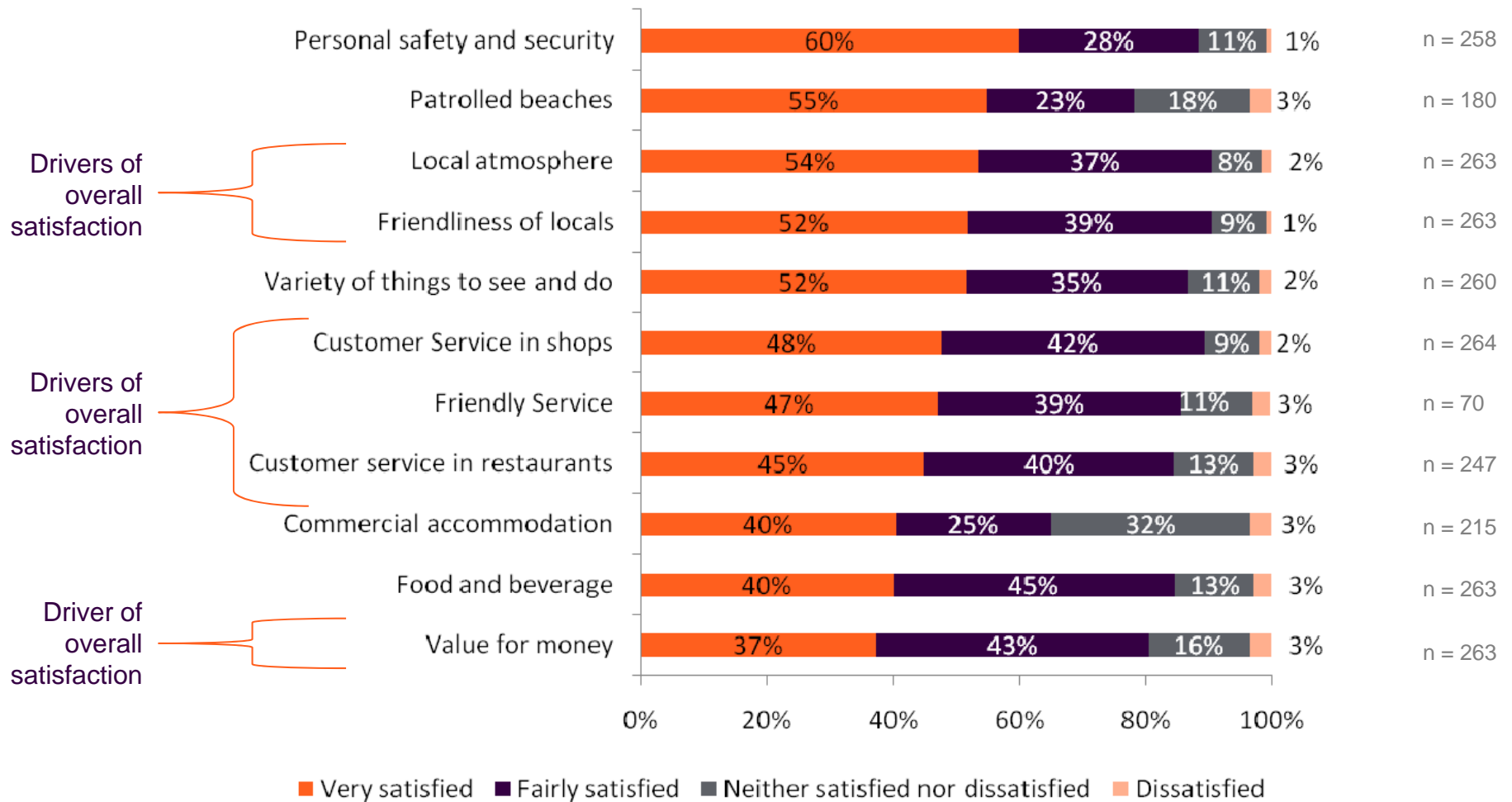
* Small Base

“Overall, how satisfied or dissatisfied were you with your experience at the Sapphire Coast?”



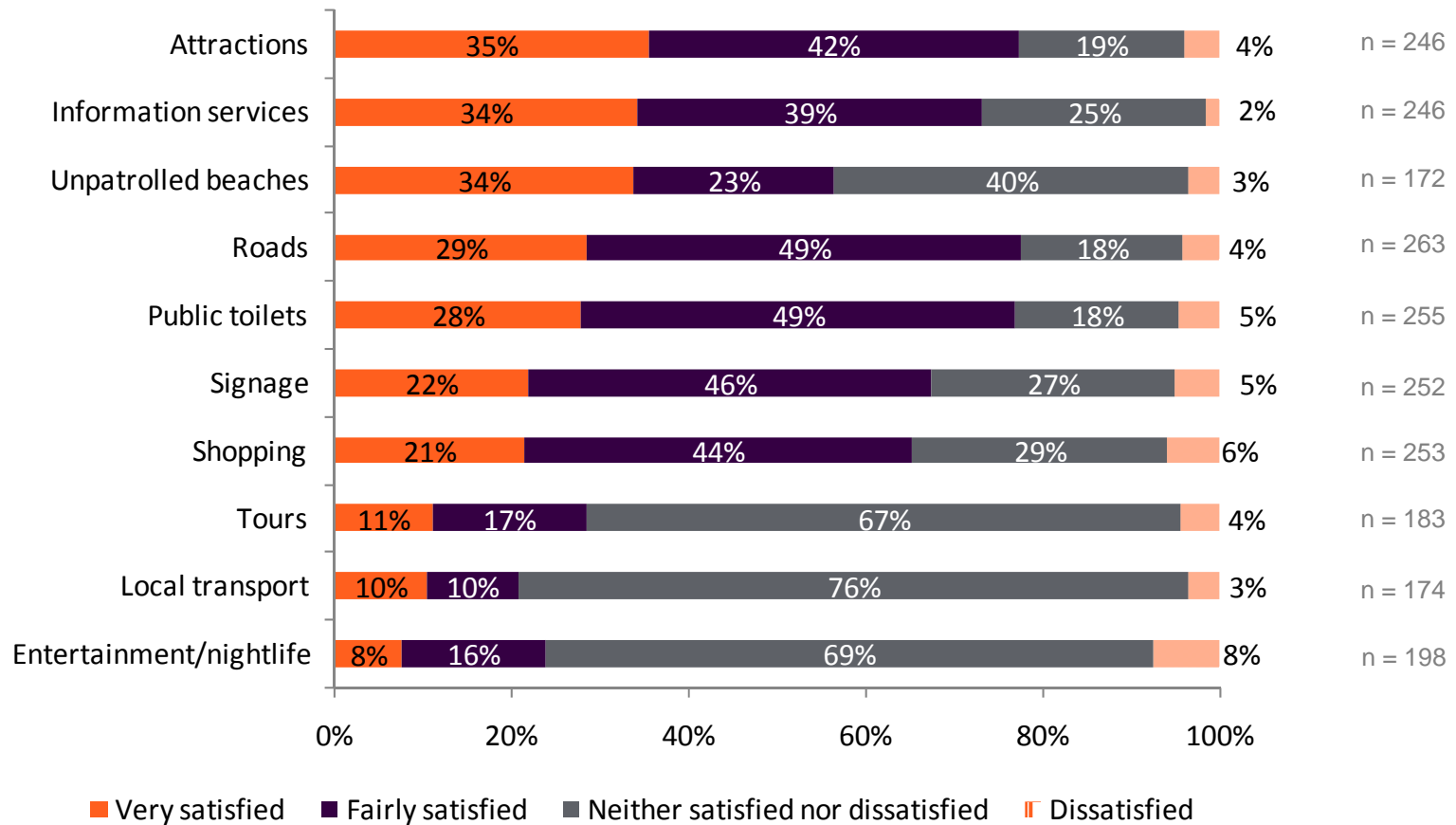
*Which, if any, of the experiences listed below did you expect the Sapphire Coast to offer?
If you answer YES, please indicate how well the region met this expectation."*

Drivers of overall satisfaction

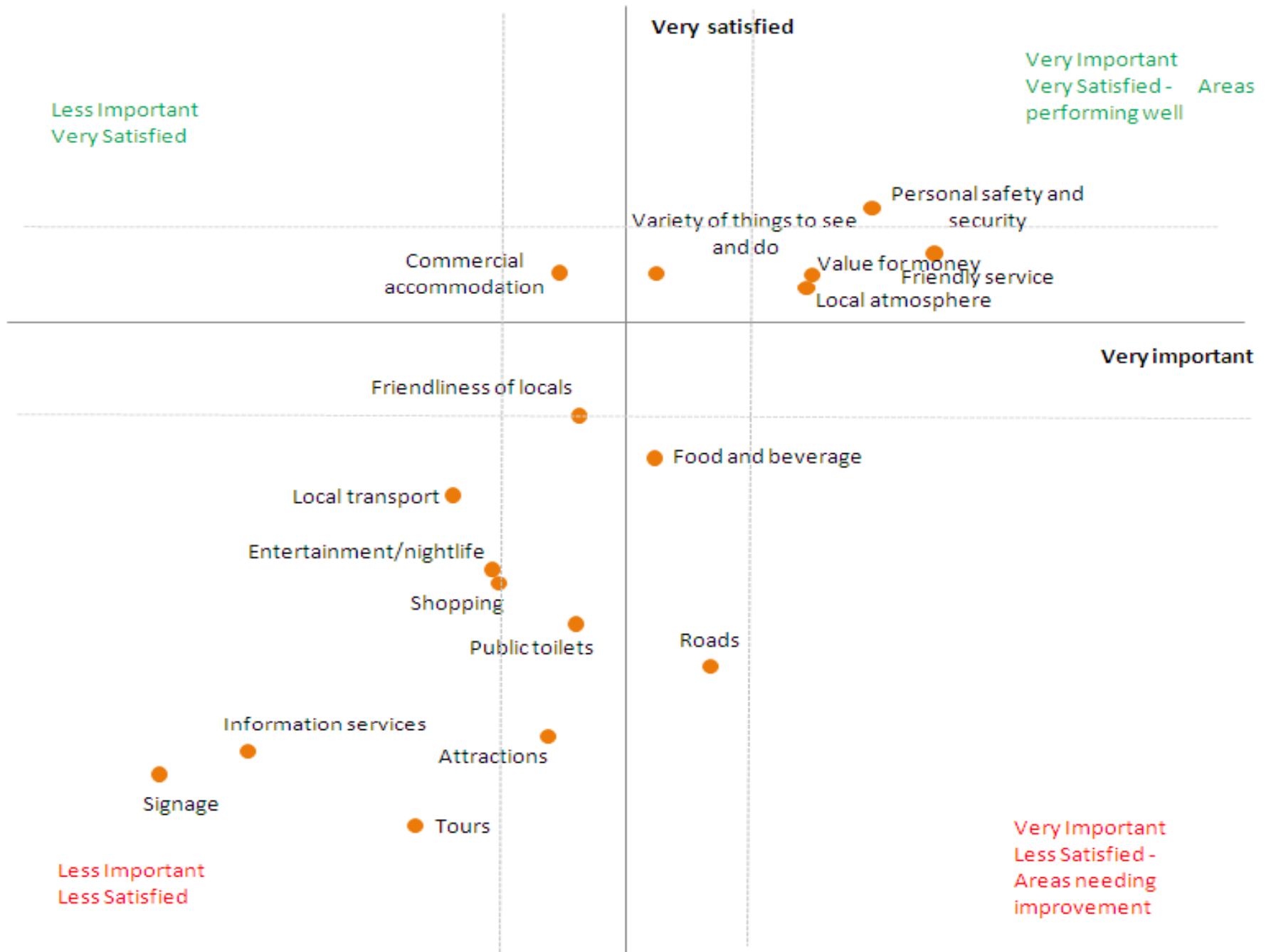


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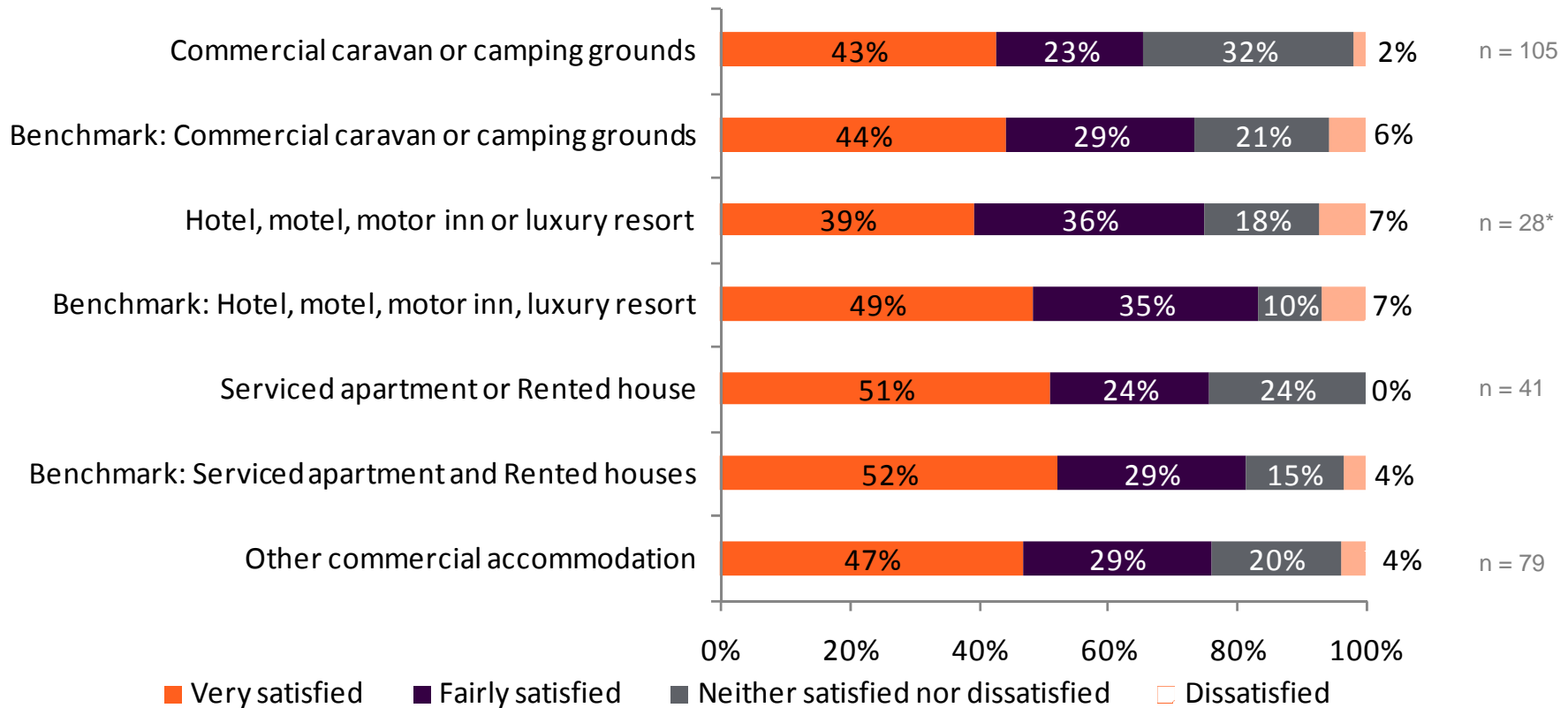
“And how satisfied or dissatisfied were you with....”



“Again, thinking about your most recent trip to the Sapphire Coast, how important or unimportant was ...”

“And how satisfied or dissatisfied were you with.... ”

Satisfaction with commercial caravan parks and serviced apartments/rented houses were close to the benchmarks



* Small Base

*“What type of accommodation did you mainly use in the Sapphire Coast?”
 “And how satisfied or dissatisfied were you with....”*

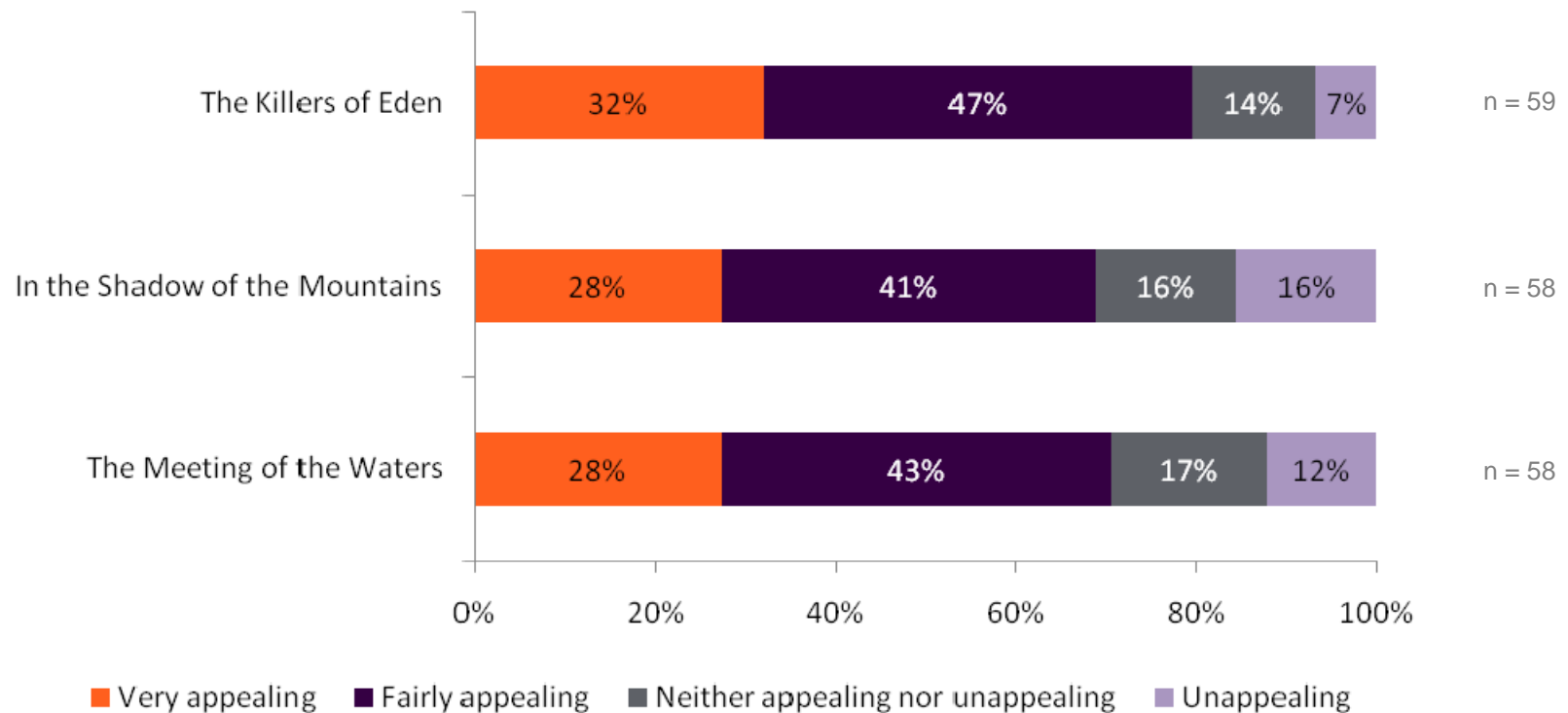
Commercial caravan parks

'We were in a great location that was central to all facilities i.e. beach, town, pool. The caravan park was excellent value and we even had great weather. Could not ask for anything more (other than a win in Lotto).' (35-44 years, repeat visitor)

'I love the <Caravan Park>. There were so many things to do within the park, we hardly left it. One of the reasons we go to the area is the variety of things to do - just in case it rains.' (45-54 years, repeat visitor)

"What else about the Sapphire Coast were you particularly happy with on your recent visit?"

The Killers of Eden was the most appealing attraction concept for Sapphire Coast visitors



*"The Sapphire Coast is considering three new attractions...
Please answer on a scale of 1 to 5 where 5 is very appealing and 1 is very unappealing"
Details of attraction concepts are in the Appendix.*

Visitors were unhappy with the roads and signage

'Signage to heritage sites is very easy to miss. Heritage sites need to be far more integrated into tourism opportunities. I nearly missed out on the Davidson Whaling Station which would have been a shame as it is a wonderful place.' (45-54 years, repeat visitor)

'Bad road signage, Princes highway needs work in many spots' (35-44 years, repeat visitor)

'The road conditions were poor' (45-54 years, first time visitor)

"What else about the Sapphire Coast were you particularly happy with on your recent visit?"

Prices of food and beverage

'It is quite expensive for food at supermarket, butchers, etc in Bermagui we find this a bit of a challenge. Also a lot of locals travel out of the town for such things because of the high cost, which means the town doesn't get that money which is a shame.' (45-54 years, repeat

'I have some reservations about value for money in some restaurants' (25-34 years old, first time visitor)

'Paying a lot more for food and alcohol' (45-54 years, repeat visitor)

'The fact that the shopping for basic supplies were so expensive and with some products may have even expired. They had to be thrown out (biscuits) and they were purchased from the supermarket.' (45-54 years, repeat visitor)

"What else about the Sapphire Coast were you particularly happy with on your recent visit?"

Summary: Why they visited and were they happy

- Reasons for visiting and expectations revolved around:
 - Relaxing with family and friends
 - Clean and beautiful beaches and nature based experiences
 - Variety of things to do including something for the kids
- Activities and attractions revolved around the ocean, nature and history/heritage

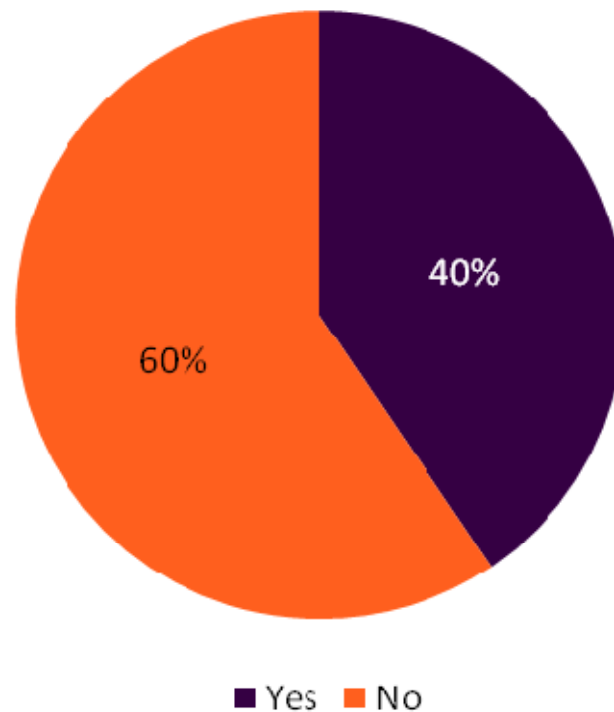
Summary: Why they visited and were they happy

- Overall satisfaction was high – especially for families, repeat visitors and those who disperse
- Driven by local atmosphere, customer service, friendliness of locals and value for money
- Personal safety, variety of things to do and accommodation above the benchmarks
- Attributes below the benchmarks included signage, roads, information services, food and beverage (costs), hotel/motel accommodation, tours, local transport, public toilets, entertainment/nightlife and attractions

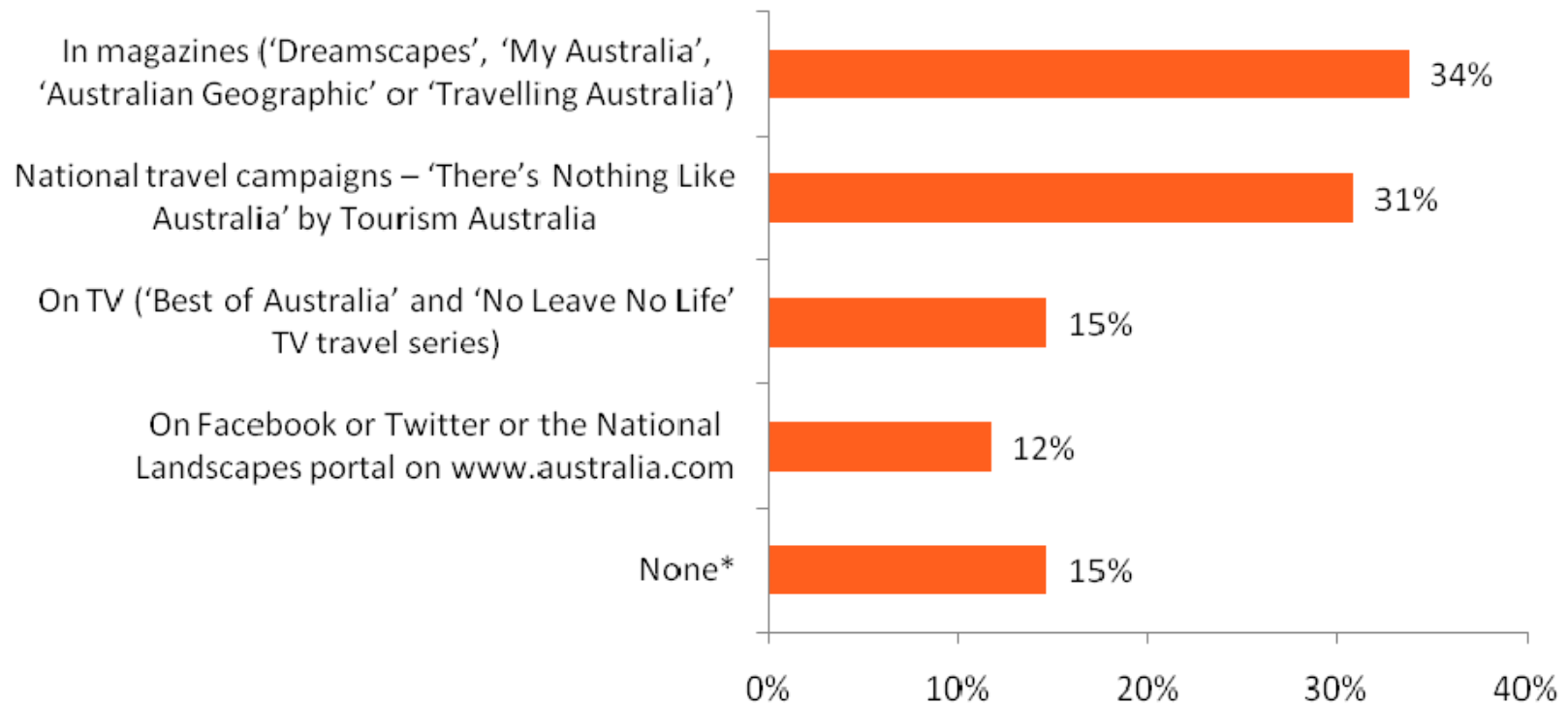
Australia's Coastal Wilderness and the Sapphire Coast

- Overall awareness
- Sources of information

The majority of visitors did not know the Sapphire Coast is part of Australia's Coastal Wilderness



The majority of visitors learnt about Australia's Coastal Wilderness through magazines or national travel campaigns



Recommendations



Australian Government
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Recommendations

1. Stimulating consumer demand
 - Wide variety of experiences on offer
2. Product development and diversification
 - Key strengths: Ability to spend time with others, variety, explore, experience natural beauty and undeveloped nature of region

Recommendations

3. Improving product and service delivery

- Digital marketing and distribution
- Food and wine, accommodation (hotels/motels), tours, attractions, roads, signage, information services etc
- Improved roads, signage and information services = increased dispersal

Thanks!

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