



Sapphire Coast Visitor Profile and Satisfaction Report: Summary and Discussion of Results

Introduction

The Sapphire Coast Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (TRA), within the Department of Resources, Energy and Tourism. The results from VPS studies are useful for destination management including planning, development and marketing.

This project was undertaken by TRA—in partnership with Sapphire Coast Tourism and Tourism NSW—to gain a better understanding of visitors to the region, including the motivations and satisfaction with their visit to the Sapphire Coast region. This includes providing more reliable and detailed information on the region, to feed directly into industry development decisions and investment initiatives, as well as to gauge visitors' awareness of the Sapphire Coast as a part of Australia's Coastal Wilderness.

Method

Since 2006, 71 VPS projects have been completed in Australian regional tourist destinations. Data from these projects have been collated to establish the VPS Benchmark Database.

Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents. Some destinations are surveyed during different times of the year in order to encompass the broadest range of visitors. In this event, only the most recent research for the destination is included. Comparisons against VPS benchmarks are made throughout this summary.

The Sapphire Coast VPS project was completed during the period January through March 2011. The effect of conducting the survey during the school holiday period is clear in the results. As one would expect, there was a high proportion of family travel parties in the survey sample, as well as a high proportion of visitors who stayed in commercial caravan or camping accommodation. These factors should be taken into account when considering the results and in subsequent discussions and planning.

Visitor and trip characteristics

The key characteristics of the survey sample were as follows:

- The majority of visitors (63%) to the Sapphire Coast region were in the family life stage and 49% of all visitors were travelling with their immediate family.
- The majority of visitors (62%) were aged 35–54 years.
- The majority of visitors (90%) visited the region for holiday/leisure purposes (includes travel for entertainment). Most of these visitors were travelling with their immediate family (49%).
- The majority of visitors (99%) were travelling domestically.
- Half of all domestic visitors were from Victoria, and 59% of Victorian visitors were from Melbourne.



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- Over four in five visitors (83%) were repeat visitors – 15 points above the VPS benchmark. Three in five repeat visitors had visited the region outside summer.
- Repeat visitors stayed longer in the region (median = 8 nights) than first-time visitors (median = 5 nights)
- The majority of both repeat and first-time visitors either travelled with their immediate family (each 49%) or with their partner (33% of repeat visitors, 27% of first time visitors).
- More than half of visitors (54%) planned their trip more than 3 months in advance. This was driven by repeat visitors and those travelling with their immediate family, with 56% of repeat visitors and 57% of family travel groups deciding to visit more than 3 months in advance.
- Previous experience and the internet were the main sources of information.
- The internet was also the most popular source for booking.
- Accommodation operator sites, third party accommodation sites and official government and tourism sites were the most popular sites for both information and booking for all types of visitors. They were also the most useful.
- Nearly all (99%) of the visitors to the region were self drive.
- Over half of visitors (54%) stayed at a caravan park or commercial camping ground – 30 points above the VPS benchmark.
- The majority of visitors who stayed at a caravan park or commercial camping ground (61%) stayed in their own caravan or campervan. These visitors stayed longer than visitors in general, with the median length of stay 14 nights (compared to 7 nights for all visitors) and 93% were repeat visitors.
- The majority of visitors (60%) did not know that the Sapphire Coast is part of Australia's Coastal Wilderness.

Motivations for visiting the Sapphire Coast

The most common reason for choosing to holiday in the region was that the Sapphire Coast was a *great place for a family holiday* – 27% of visitors cited this as the single most important reason. A further 8% stated that it was a *great place to spend time with my partner*. Other main reasons for choosing the region followed the themes of the beaches/nature/fishing; the fact that the region is undeveloped; and the presence of friends/family.

Not surprisingly, *relaxation and rejuvenation* is an experience required by the majority of leisure visitors to most holiday destinations. However, for the Sapphire Coast it was an exceptionally highly sought after experience that was expected by 94% of visitors – 16 points above the VPS benchmark. *Something the kids would enjoy* was another experience expected by the majority of visitors (68%), 35 points above the VPS benchmark.

Three other experiences were also expected by high proportions of Sapphire Coast visitors:

- *a place to spend quality time with friends* (87% – compared to 75% for the benchmark)
- *nature based experiences* (76% – compared to 68% for the benchmark)
- *an opportunity to tour around and explore* (80% – equal to the benchmark).

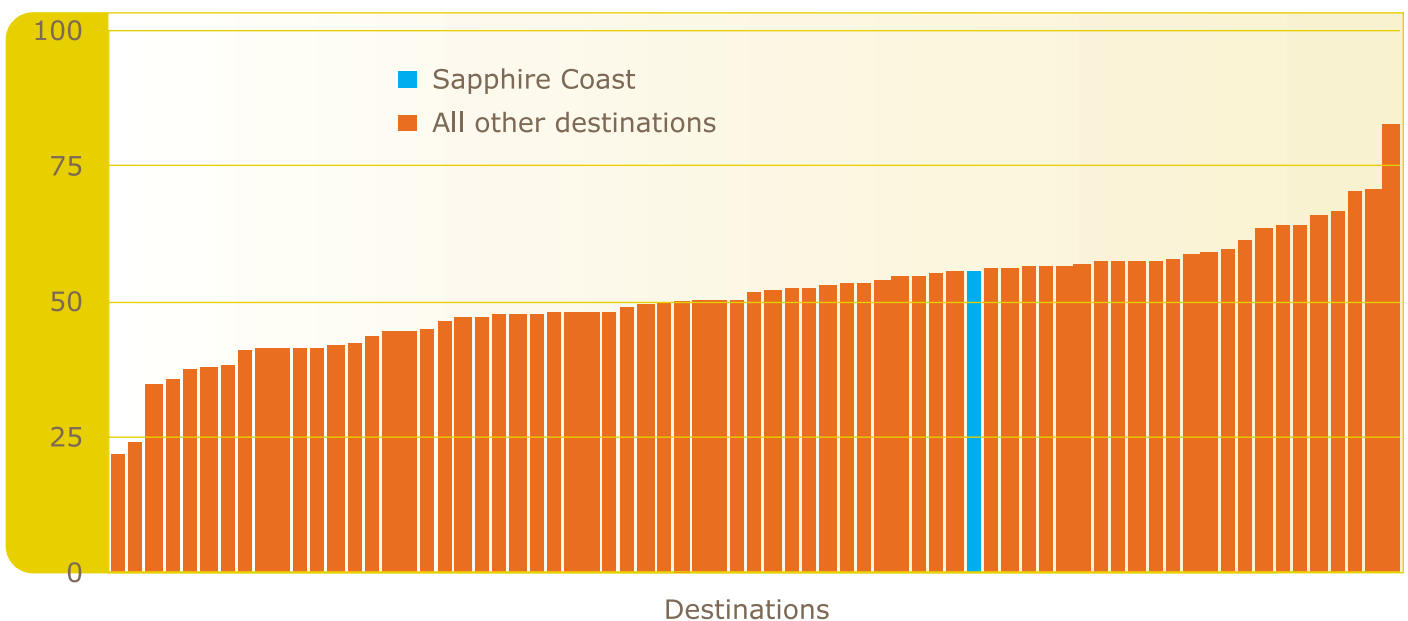
The only experience where expectations were better than expected when compared with the VPS benchmark was *something the kids would enjoy*. Expectations for all other experiences were rated as expected. In regions with high proportions of repeat visitors, it is generally harder to exceed expectations.

As discussed, *relaxation and rejuvenation* was a primary motivating factor in holidaying at the Sapphire Coast. When analysing the activities that visitors participated in during their stay, it is clear that relaxing and rejuvenating is not just about sitting around doing very little. Many of the activities on offer in the region recorded very high participation levels when compared to VPS benchmarks. Most notable was *going to the beach* (83% of visitors, 33 points above the benchmark) and *fishing* (42% of visitors, 34 points above the benchmark). Of those visitors who went to the beach, 79% visited a patrolled beach and 58% an unpatrolled beach. The long list of other activities that score above the benchmarks were:

Activity	Proportion of visitors who participated	
	Sapphire Coast	VPS Benchmark
General sightseeing	85%	74%
Go to the beach	83%	58%
Eat out	76%	68%
Go shopping	70%	55%
Go fishing	42%	8%
Visit state/national parks	42%	33%
Go to markets	35%	28%
Picnics/BBQ	32%	21%
Visit museums/galleries	32%	27%
Bushwalking	31%	30%
Other water activities/sports	13%	6%
Hire a 4WD	11%	3%

Satisfaction with the Sapphire Coast

The figure below shows where the Sapphire Coast ranks in overall satisfaction compared to all other participating VPS destinations. About 56% of visitors were very satisfied with the Sapphire Coast, five percentage points above the VPS benchmark of 51%.



The strong *overall satisfaction* result is interesting when considering satisfaction levels with individual features of the Sapphire Coast. A statistical analysis showed the top five key drivers of overall satisfaction:

- Friendliness of locals (52% very satisfied)
- Local atmosphere (54% very satisfied)
- Value for money (37% very satisfied)
- Customer service in restaurants (45% very satisfied)
- Customer service in shops (48% very satisfied)

With the exception of *friendliness of locals*, the scores for these attributes were above the VPS benchmarks in terms of the proportion of visitors very satisfied. Other attributes above the benchmarks included *personal safety and security*, *variety of things to see and do* and *commercial accommodation*.

On the downside, there were a number of functional attributes of the trip that scored below the VPS benchmarks. These included:

- *food and beverage* – also an attribute very important to visitors – open ended comments suggest the high costs of food and beverages in supermarkets and restaurants was an issue
- *roads* – also an attribute very important to visitors compared with the benchmark – open ended comments suggest the poor quality of the roads was an issue
- *signage* – open ended comments suggest that poor road signage made attractions easy to miss
- *local transport, entertainment, shopping, public toilets, information services, attractions and tours.*

The satisfaction results have shown that visitors who disperse to more locations within the region during their stay are more likely to be very satisfied than those who disperse less. Close to three quarters of visitors to the region visited more than one location during their stay, and more of these visitors were very satisfied with their trip to the region overall than visitors who arrived and stopped in one location. This is an indication that visitors seek out the variety of experiences on offer throughout the region, taking a broader geographic view of the destination than just where their accommodation is located. This is an important point to destination managers and the various tourism organisations in the region – from a visitor perspective, the region is a more attractive and enjoyable place when experienced as a whole rather than as individual locations.

Recommendations

Despite a high overall satisfaction score, there is clearly scope to improve offerings (including quality) such as *food and wine, accommodation (particularly hotel/motel), tours, attractions, roads, signage, information services etc.* This is particularly important if the region's focus is to attract more first-time visitors to the region and/or increase visitation in non-peak periods, both of which are likely to be less skewed to the family market. The local industry should consider diversifying, reinvigorating and developing their products and services so as to remain competitive both domestically and internationally.

The following recommendations are made for further consideration by the local industry.

1. Stimulating consumer demand

- A key strength of the Sapphire Coast is the wide variety of experiences on offer across the entire region including things for the kids to do. This should be taken into consideration when marketing the region and increasing first-time visitation.

2. Improving product and service delivery

- Given the popularity of the internet being used by the region's visitors for information and booking before their trip, the local industry should be encouraged to become more proficient in digital marketing and distribution.
- Encouraging visitors to disperse across the entire region is very important, with improved visitor information services, signage and roads one way of achieving this.

3. Product development and diversification

- The ability to relax; spend time with others; explore; experience the natural beauty of the region; and the undeveloped nature of the region are key strengths as noted by visitors to the Sapphire Coast. Future tourism development aimed at these peak markets or other non-peak markets should be sympathetic to these highly desirable characteristics of the region.

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