

# Sapphire Coast Visitor Profile and Satisfaction Survey



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



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# Background



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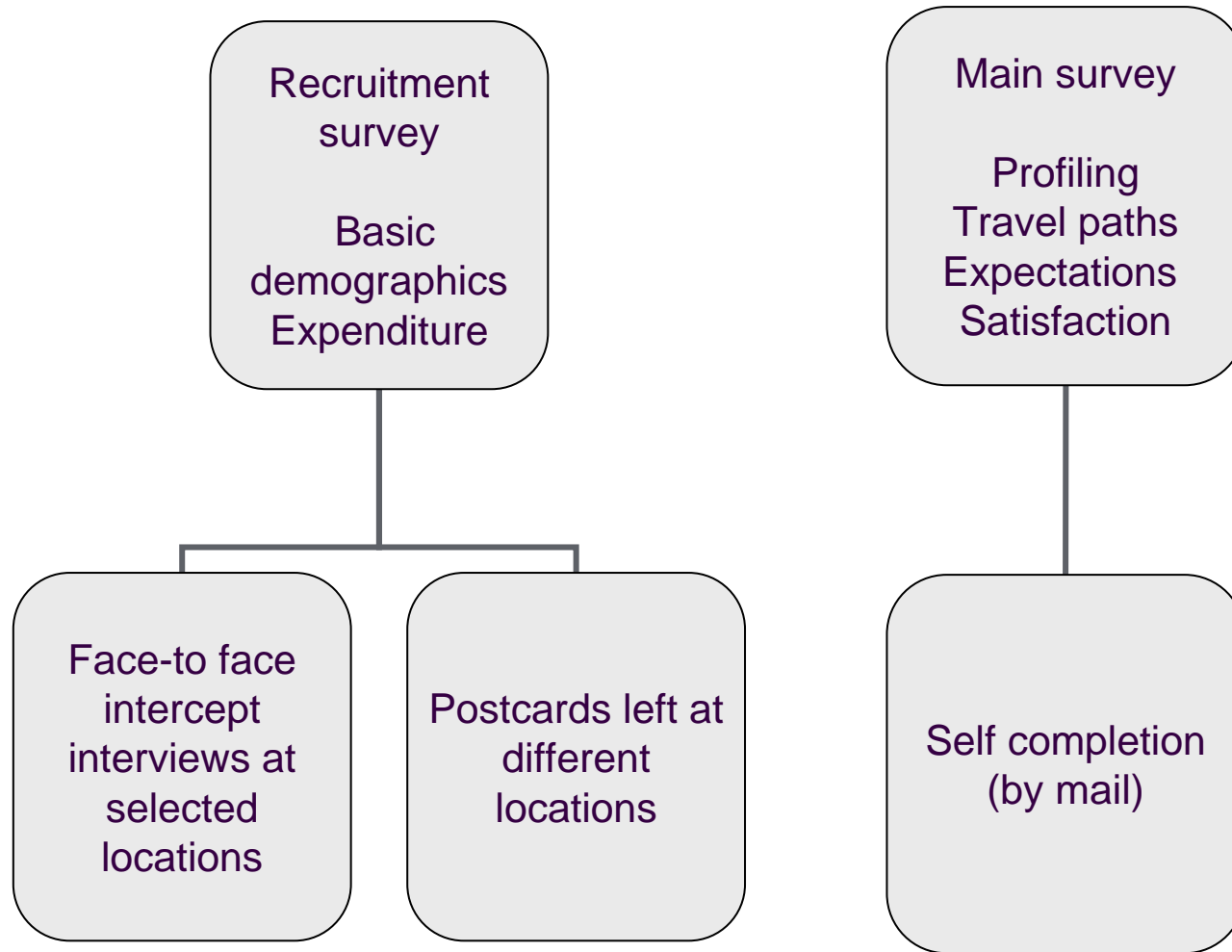
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# Sapphire Coast VPS project

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 (part of the Department of Resources Energy and Tourism).

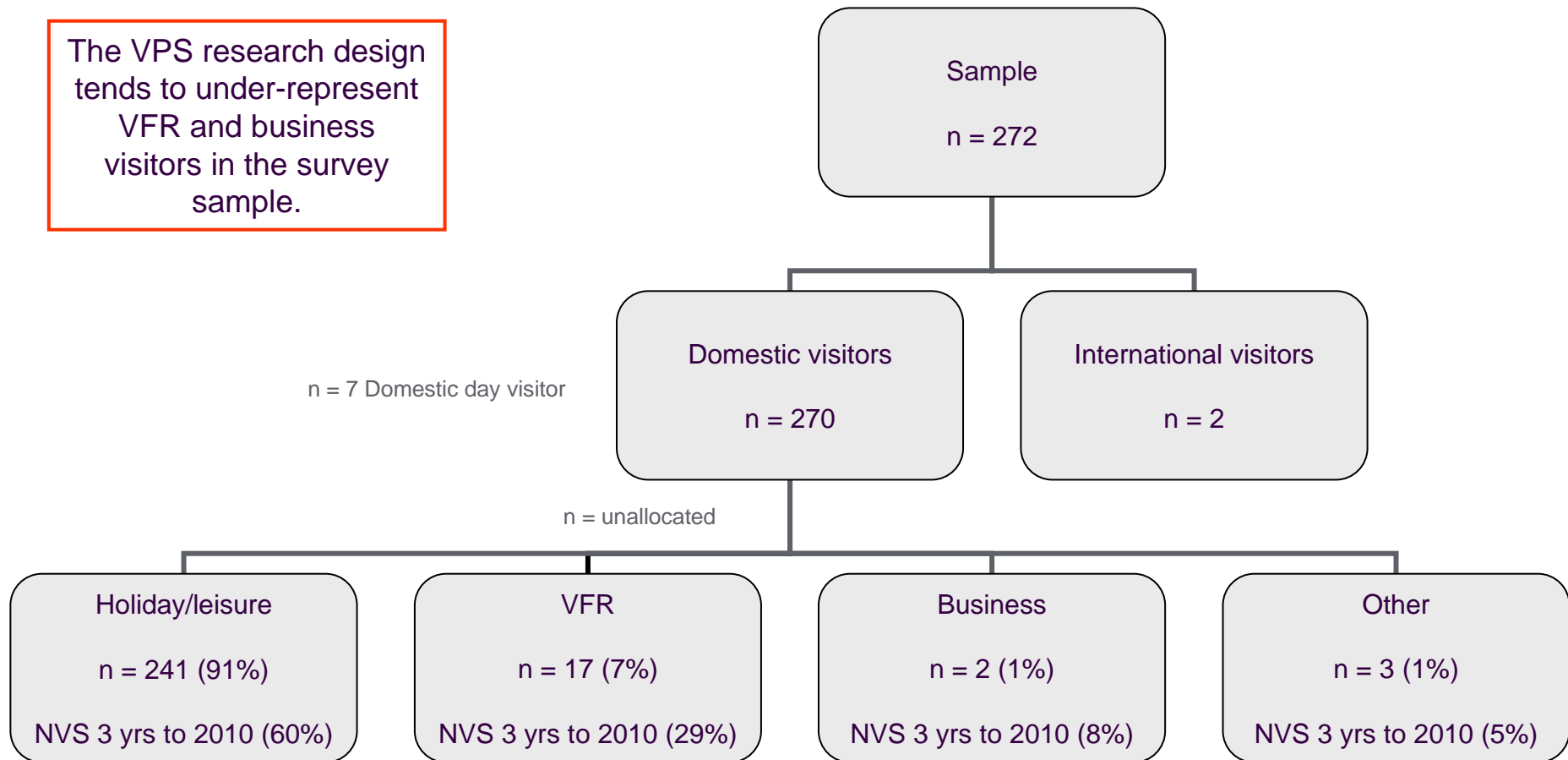
Respondents were recruited during their visit to the region in January to March 2011.

# 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

# VPS Benchmarks

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. Only the most recent waves for each destination are included.

Comparisons against VPS benchmarks are made throughout this report. The Sapphire Coast Benchmark Summary is available in conjunction with this report. This summary provides a full set of comparisons for Sapphire Coast results against the benchmarks.

# VPS Benchmarks

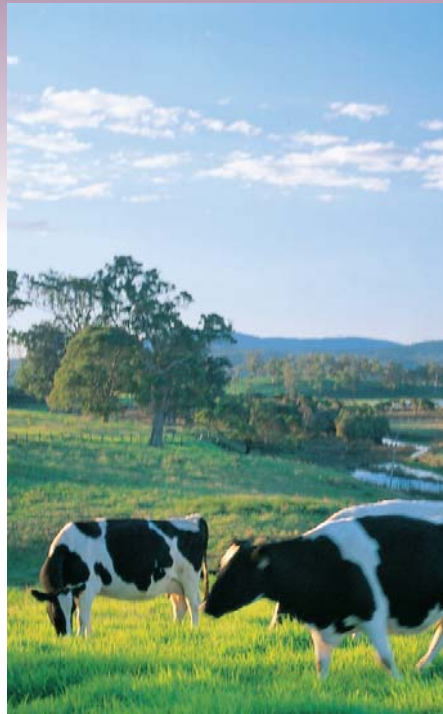
Additionally some data are compared with a 'subgroup' of destinations that have similar attributes to the Sapphire Coast region. The 'subgroup' includes:

- Batemans Bay
- Coffs Coast
- Gippsland
- Shoalhaven

Sapphire Coast data are included in the benchmark.

More detail on the Benchmark Summary is provided in the Appendix.

# Discussion of findings



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# Discussion of findings

## 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.

# Discussion of findings

## 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.

# Discussion of findings

## 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.
- 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).

# Discussion of findings

## Visitor and trip characteristics cont.

The key characteristics of the survey sample were as follows:

- More than half of visitors (54%) planned 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.

# Discussion of findings

## **Motivations to visit 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, being 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); and
- 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.

# Discussion of findings

## Motivations to visit the Sapphire Coast cont.

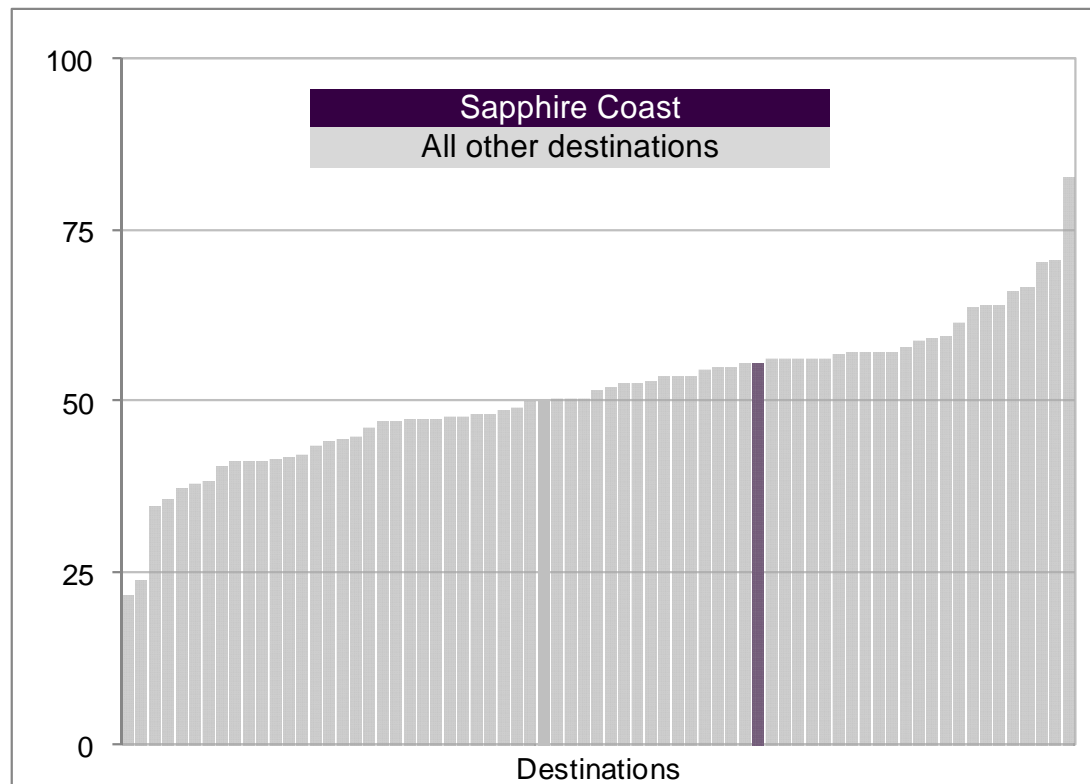
As discussed, relaxation and rejuvenation was a primary motivating factor in holidaying at the Sapphire Coast. When analysing the activities that visitors participated in during their stay, it is clear that relaxing and rejuvenating is not just about sitting around doing very little. Many of the activities 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 with (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	% 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%

# Discussion of findings

## 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%.



# Discussion of findings

## **Satisfaction with the Sapphire Coast cont.**

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.

# Discussion of findings

## **Satisfaction with the Sapphire Coast cont.**

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 as 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; and
- 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 dropped 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 its individual locations.

# Discussion of findings

## 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.

# Discussion of findings

## **Recommendations cont.**

### 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, the natural beauty and the undeveloped nature of the region are key strengths in their eyes. Future tourism development aimed at these peak markets or other non-peak markets should be sympathetic to these highly desirable characteristics of the region.

# Visitor and trip characteristics



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## Visitor profile (during the survey period)

- Trip purpose
- Age
- Life stage
- Travel party
- Origin

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



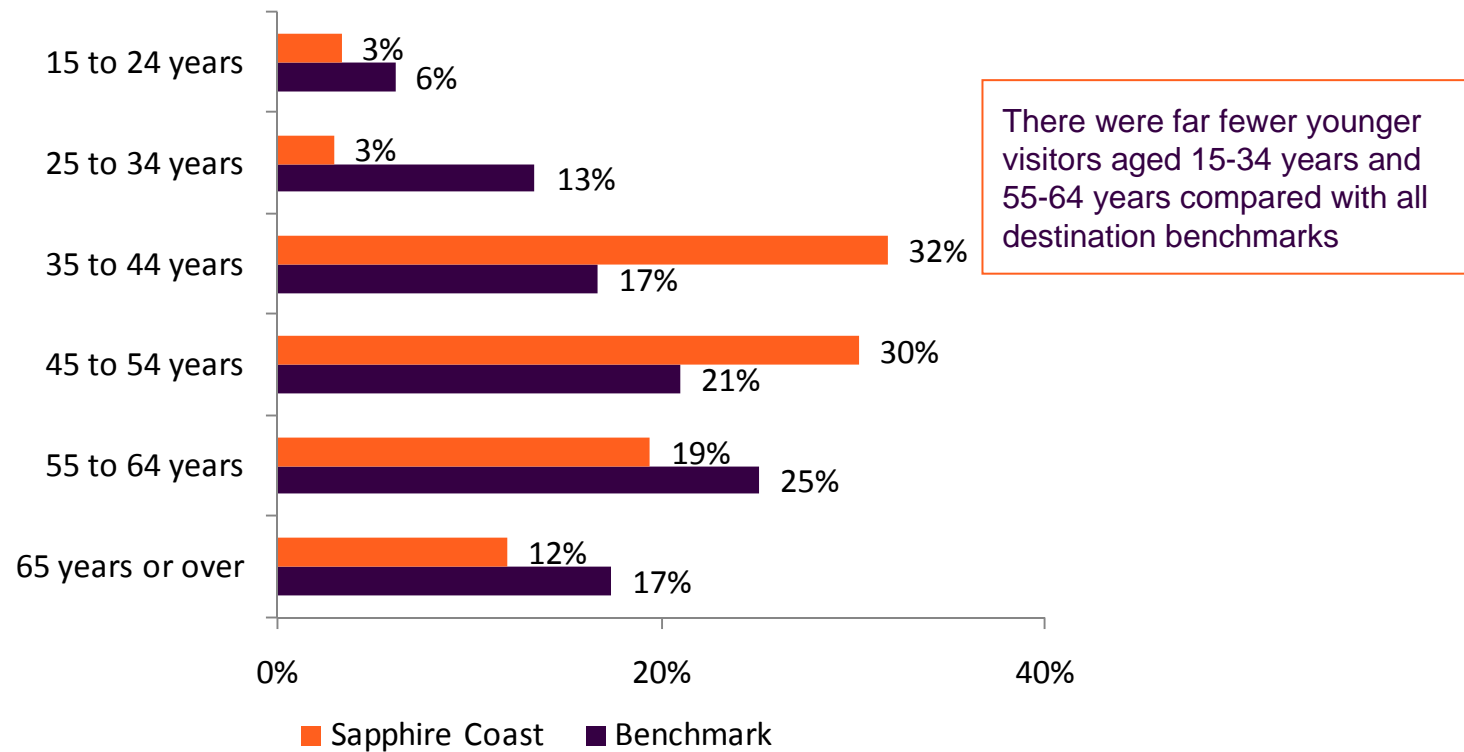
There was a high proportion of visitors for holiday/leisure compared with the subgroup and all destination benchmarks

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

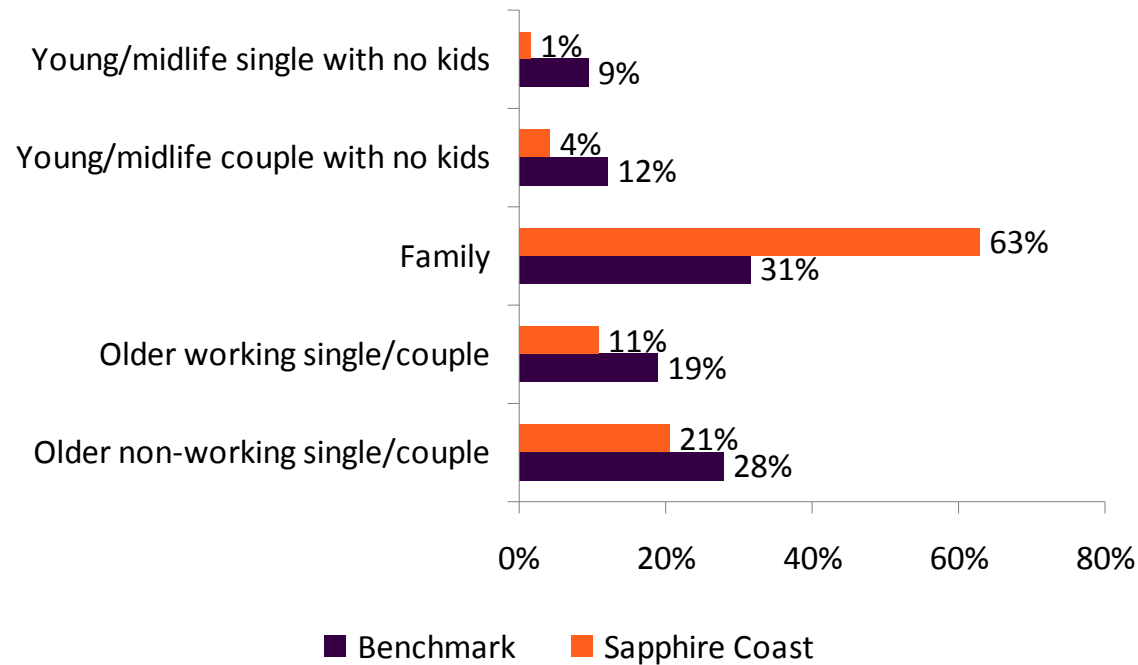
Base = 272

'What was the main purpose of the trip?'

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



# Over six in ten visitors were in the family life stage group, a higher proportion than the benchmarks

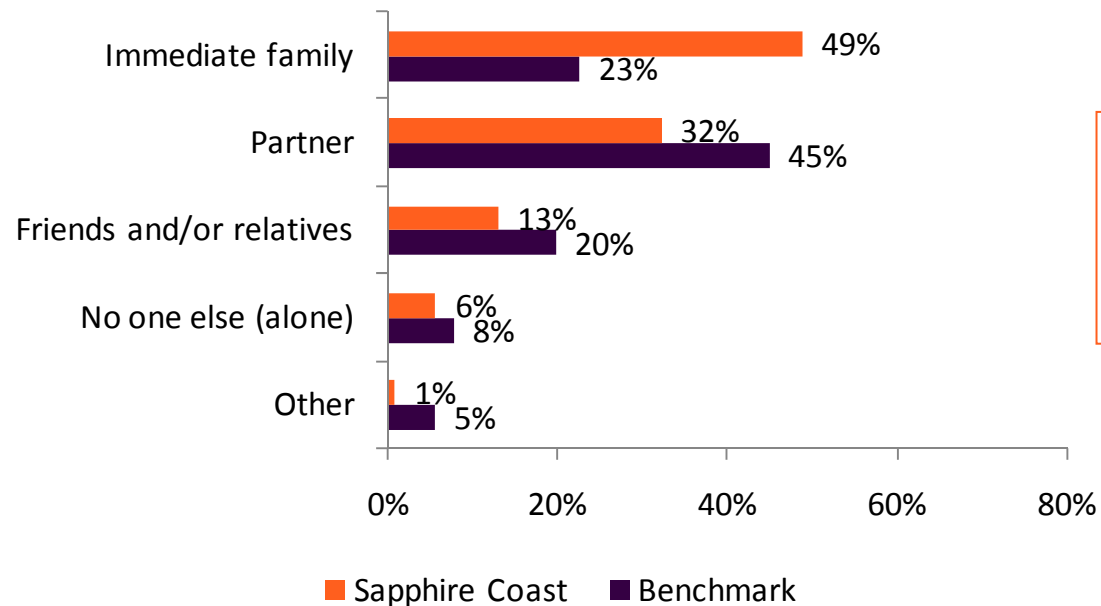


Life Stage			
Young/midlife single	1%	↓ -5%	↓ -8%
Young/midlife couple	4%	↓ -6%	↓ -8%
Family	63%	↑ 26%	↑ 31%
Older working	11%	↓ -5%	↓ -8%
Older not working.	21%	↓ -10%	↓ -7%

Base =267

Derived variable from demographic questions

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



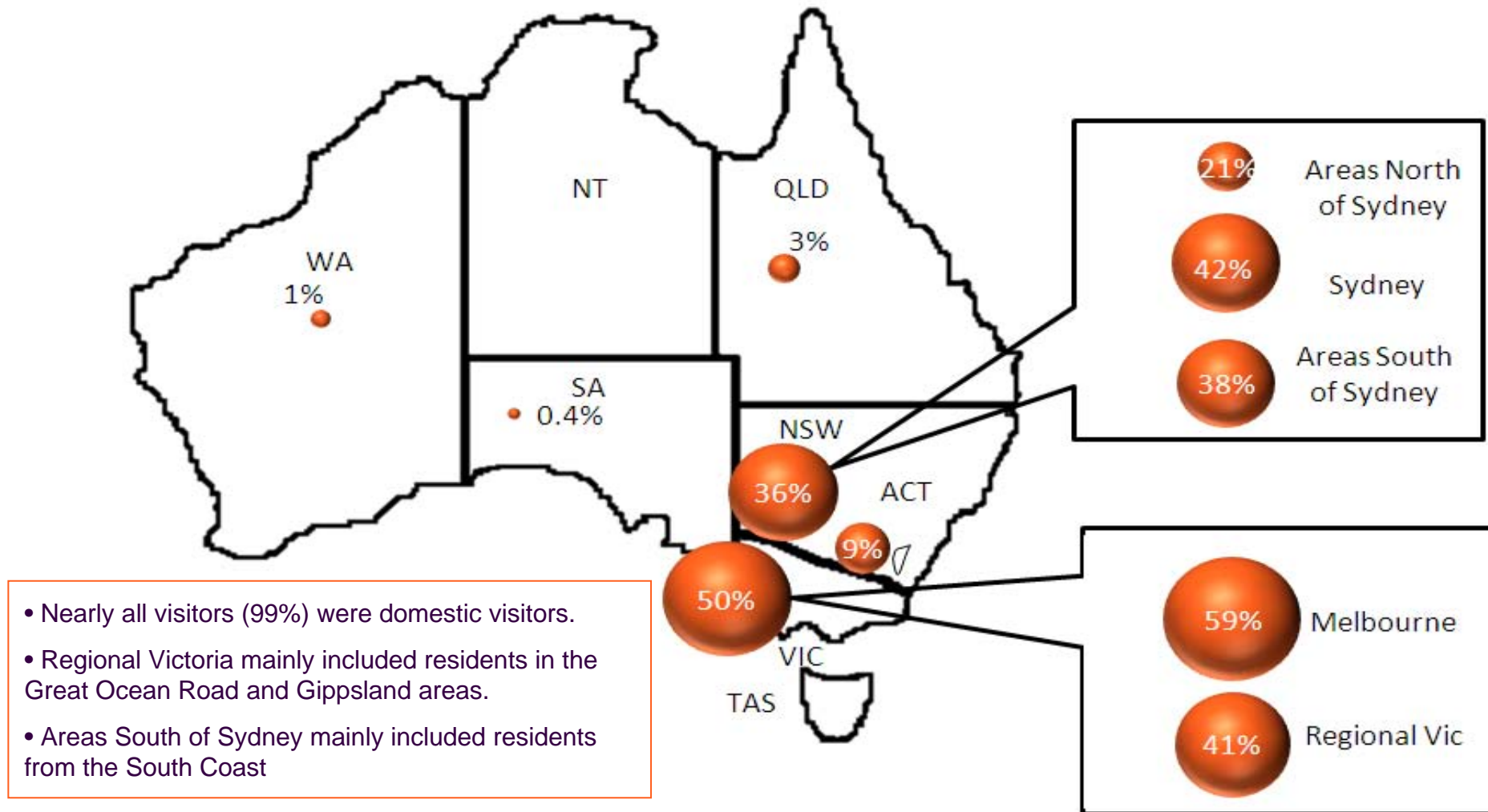
Visitors were less likely to travel with their partner or with friends and/or relatives compared with the subgroup and all destination benchmarks

Travel Party			
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?"*

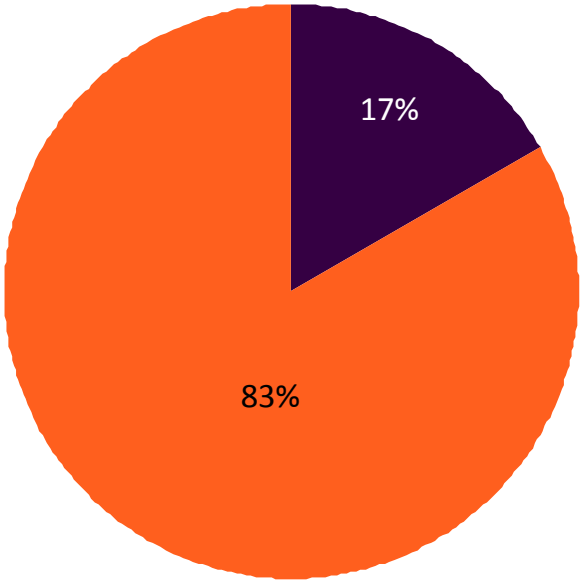
# Summary

- 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. Both these proportions were higher than the benchmarks.
- 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 (49%) were travelling with their immediate family.
- Nearly all visitors to the Sapphire Coast (99%) were travelling domestically.
- Half of all domestic visitors (50%) were from Victoria, and 59% of Victorian visitors were from Melbourne.

# Trip planning and booking

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

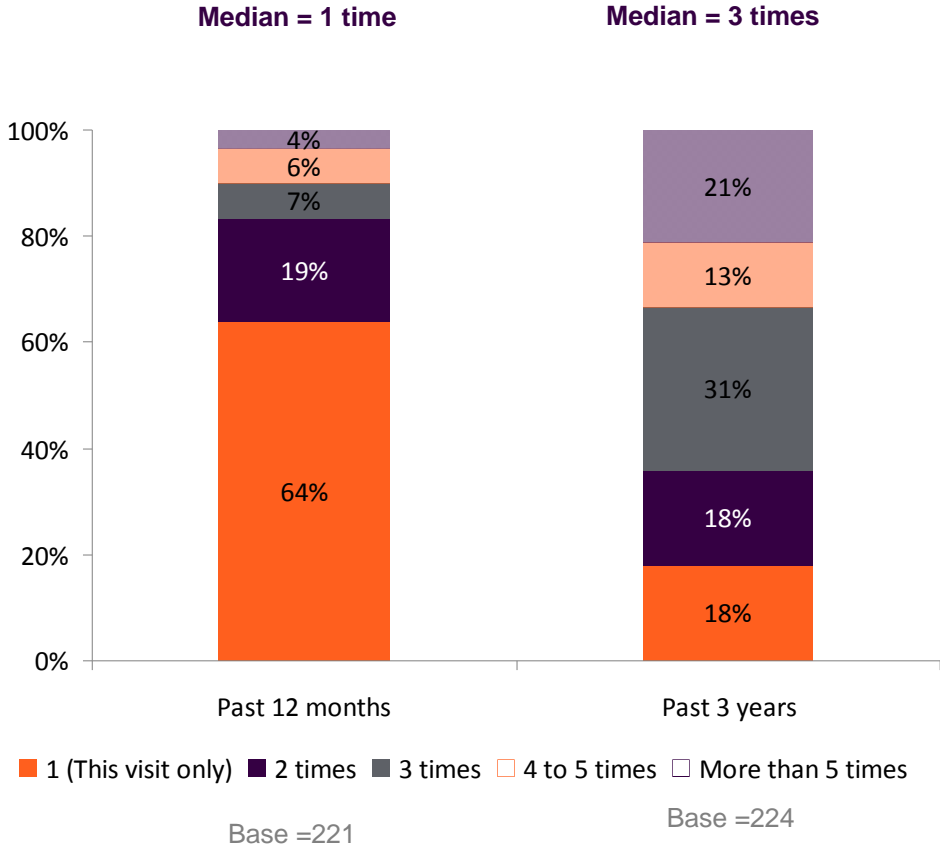
# Over four in five visitors were repeat visitors, much higher proportions than the benchmarks



■ 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?”*



Median = 1 time

Median = 3 times

■ 1 (This visit only) ■ 2 times ■ 3 times ■ 4 to 5 times ■ More than 5 times

Base =221

Base =224

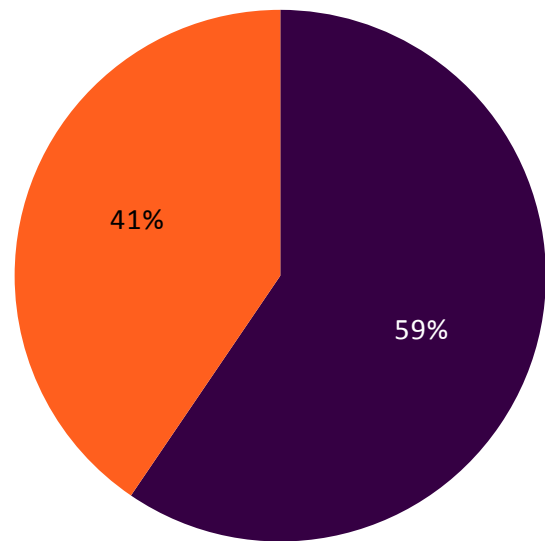
*“How many times have you visited the Sapphire Coast, including both day trips and overnight trips ”*

# Profile of visitors by first/repeat visitor

	<b>First time visitor (17%)</b>	<b>Repeat visitor (83%)</b>
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)

Base = 271

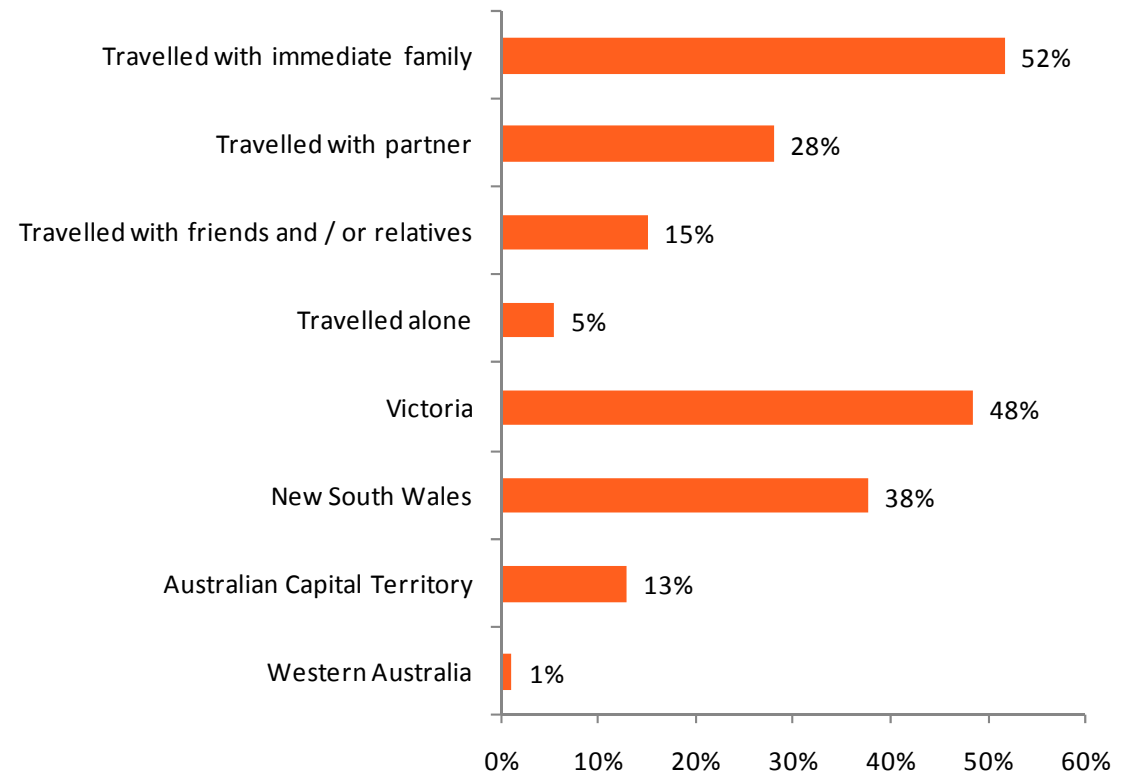
# Three in five have visited the region outside of Summer – mainly families travelling together and visitors from Victoria



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

Base = 158

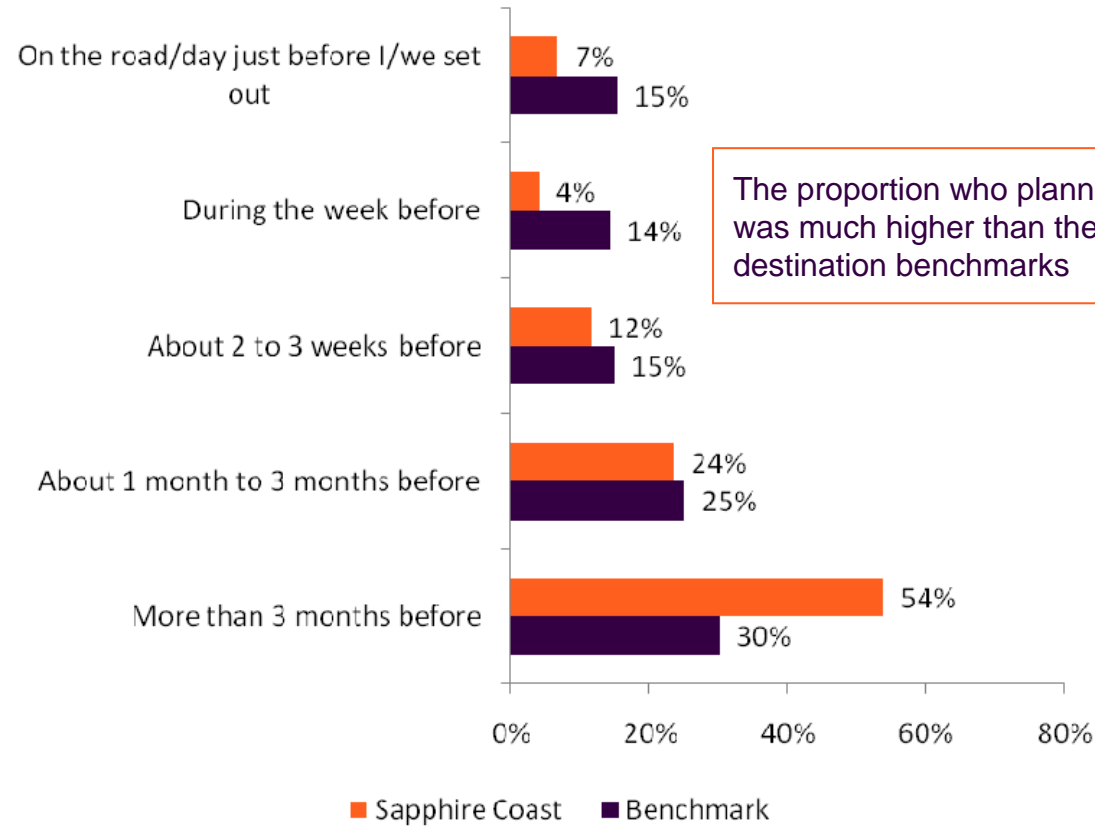
*"Have you visited the Sapphire Coast for a holiday outside the summer period during Autumn, Winter or Spring?"*



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 ..."*

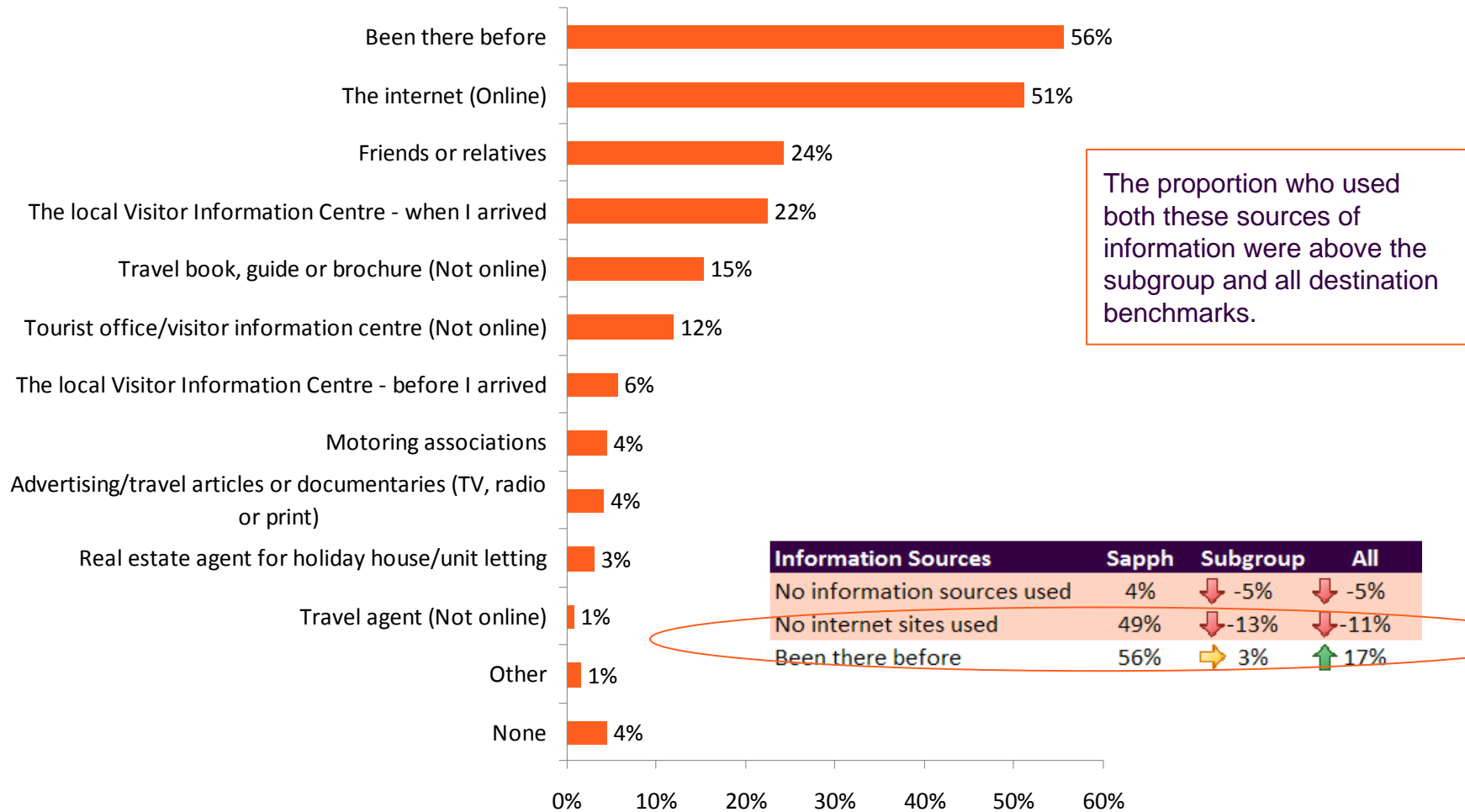
# The majority of visitors planned more than 3 months in advance



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?"*

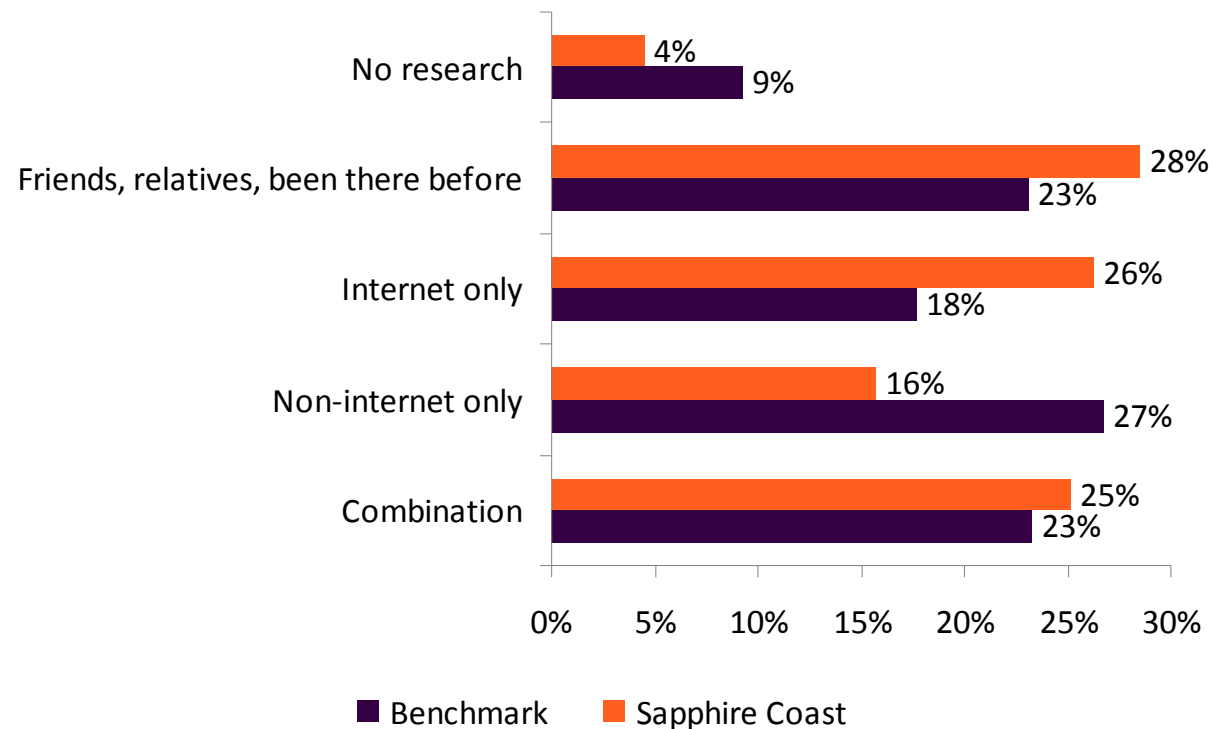
# Previous experience and the internet were the mains sources of information



Base = 268

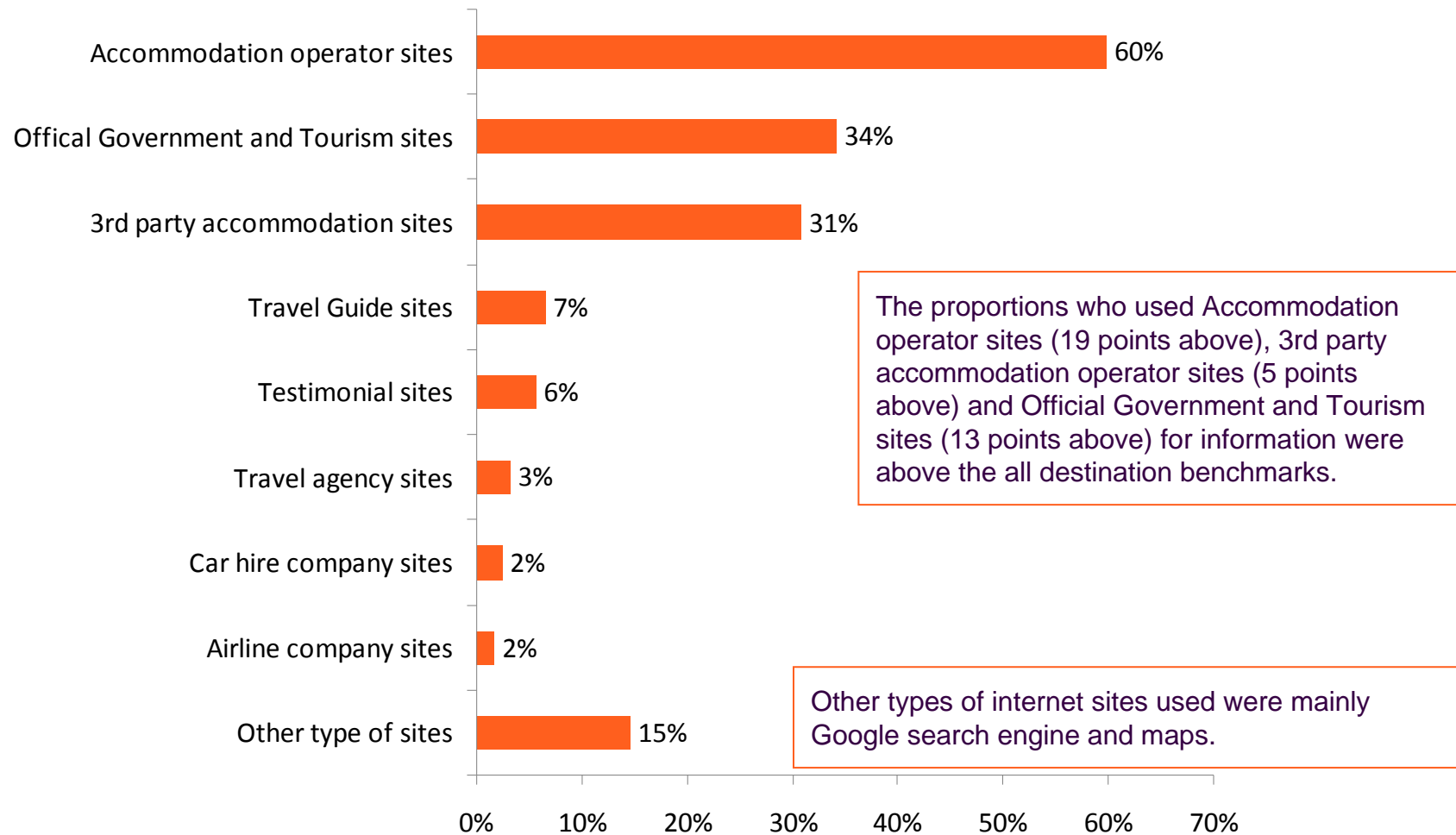
'Which of the following did you use to obtain information for this trip to the Sapphire Coast?'

# 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')

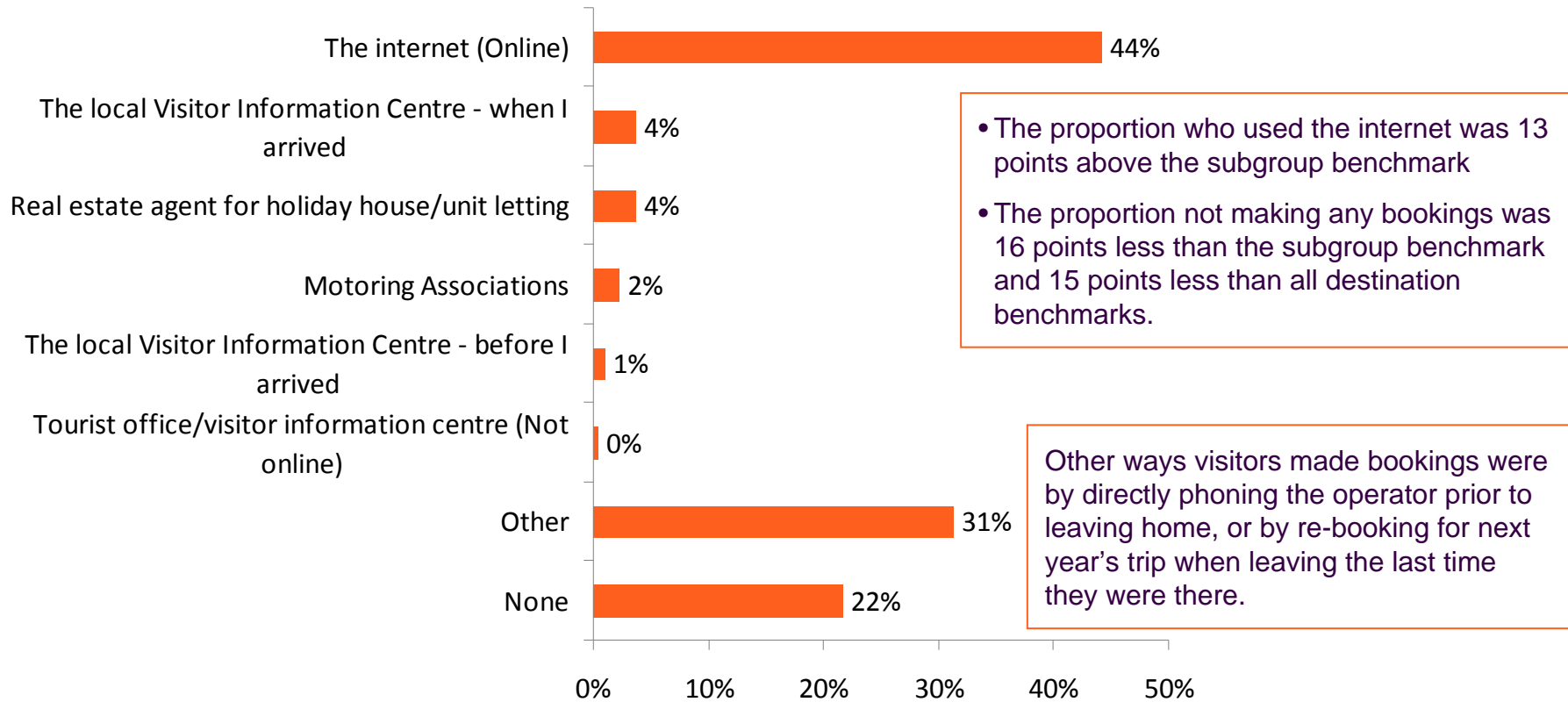
# Accommodation operator sites were the most popular source for information



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

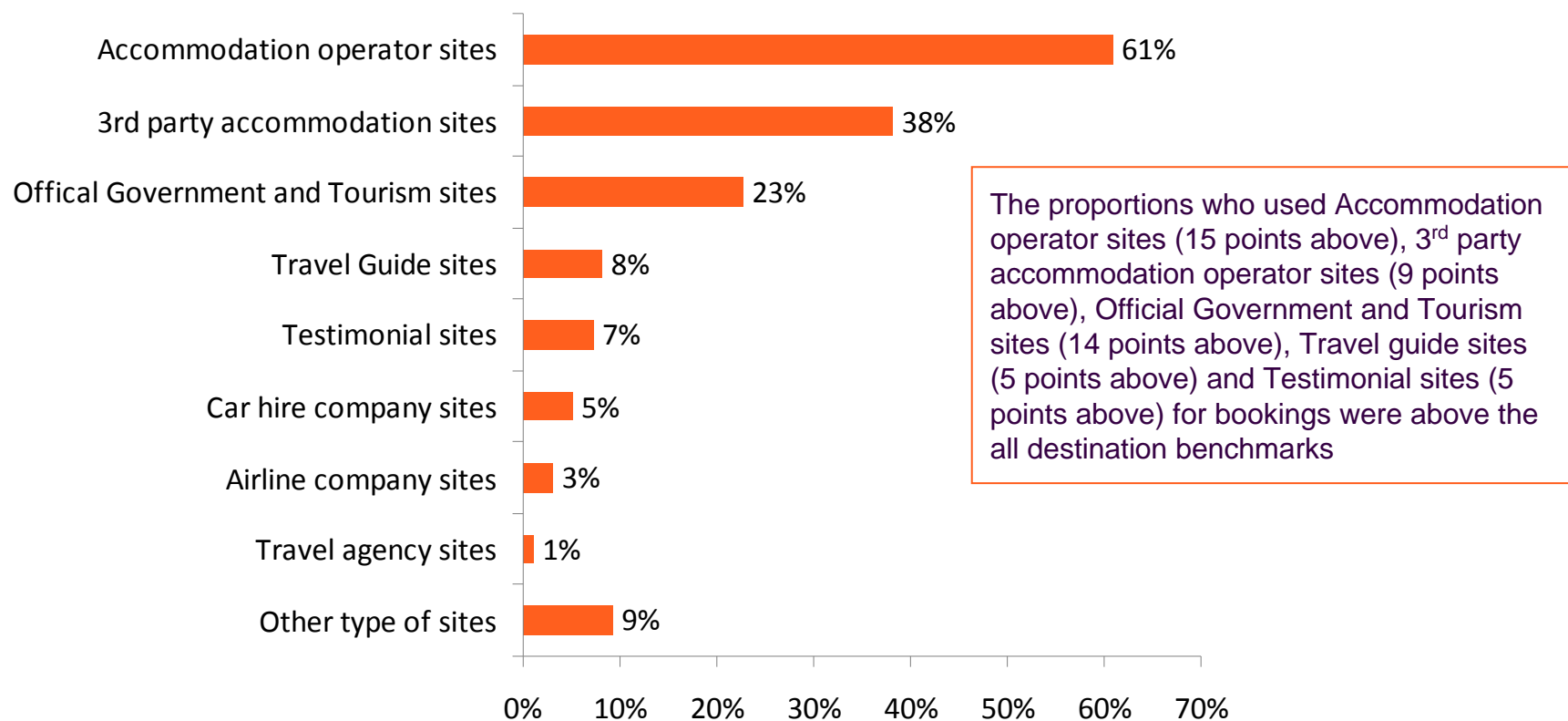


Prior bookings - Internet sites	Sapph	Subgroup	All
No prior bookings made on internet	56%	↓ -13%	→ 0%
Prior Bookings - Non internet	Sapph	Subgroup	All
No prior bookings made	22%	↓ -16%	↓ -15%

Base = 217

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

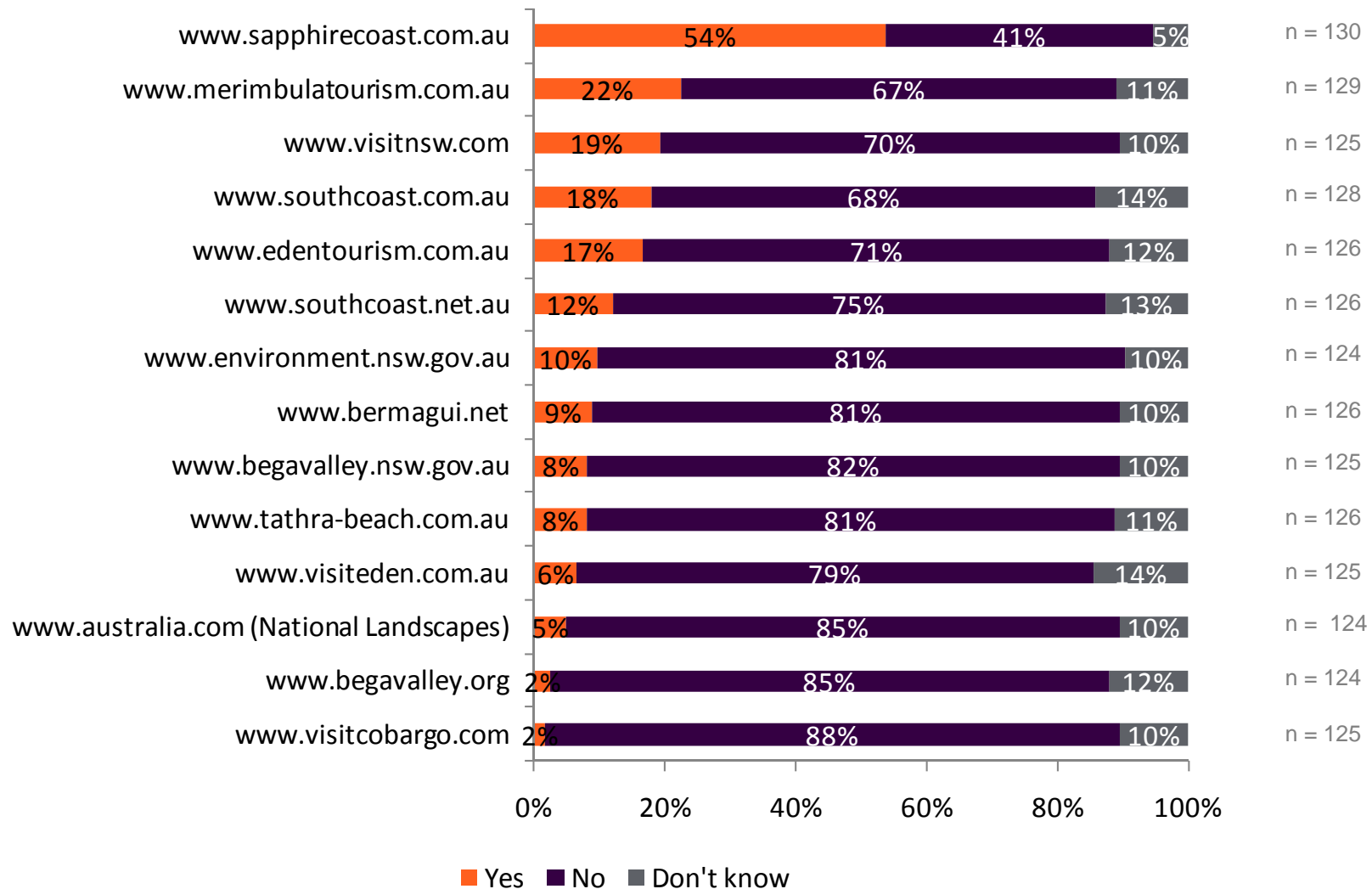
# Accommodation operator sites were the most popular sites for booking



Base = 97

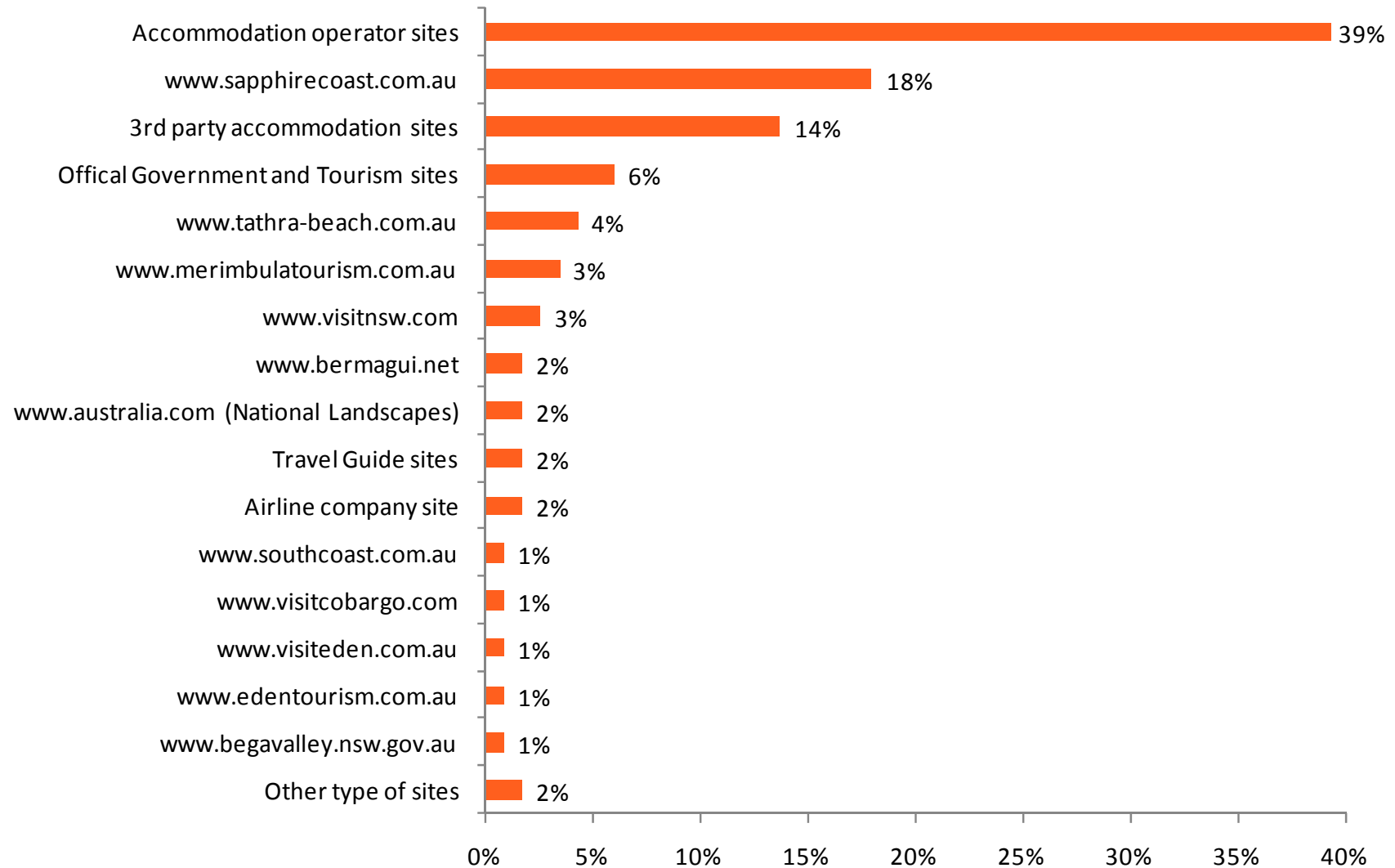
*'You mentioned that you used the internet for booking. What are the type of websites you went to?'*

# 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?"*

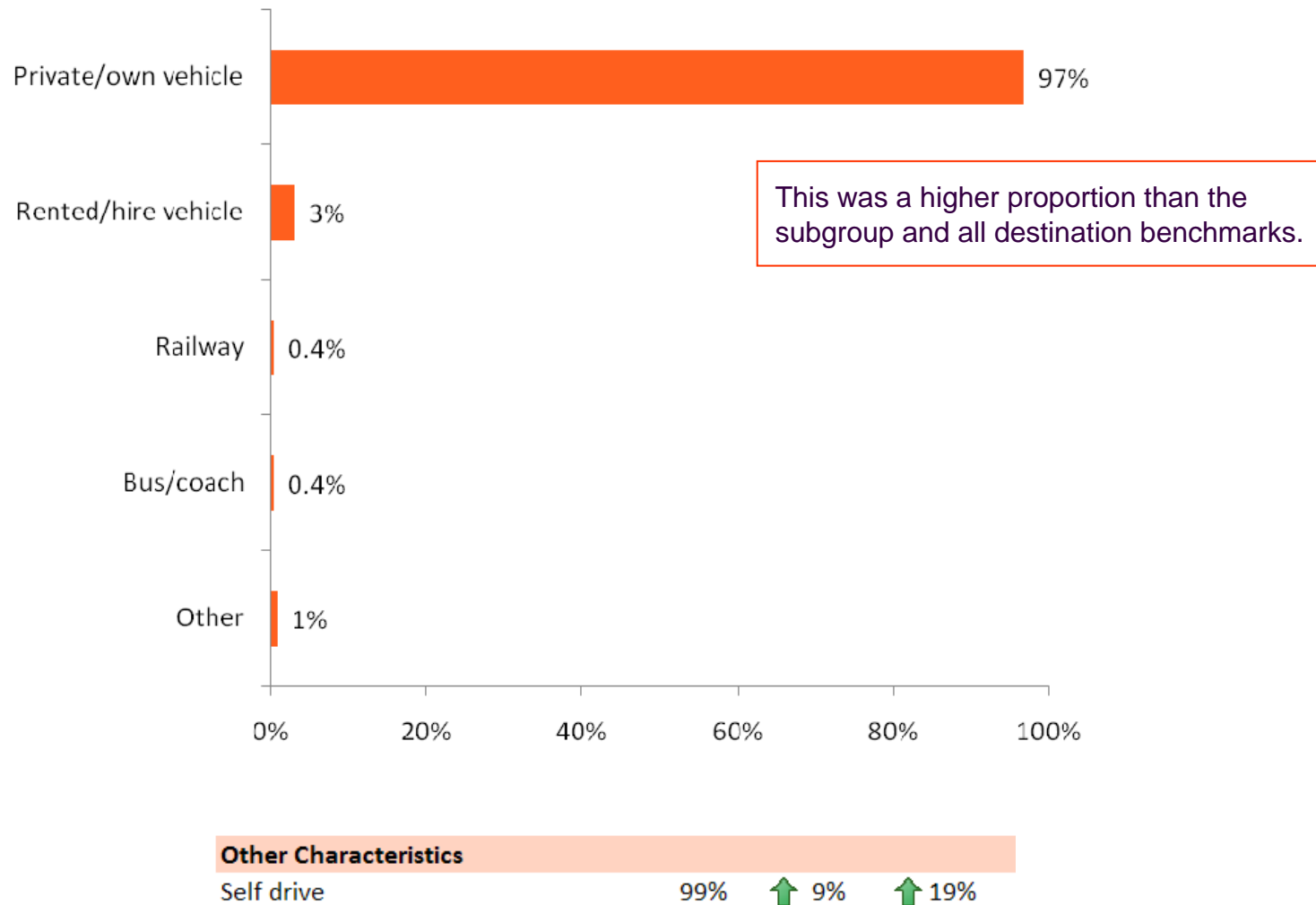
# Summary

- Over four in five visitors were repeat visitors – 15 points above the all destination benchmark.
- The majority of both repeat and first time visitors either travelled with their immediate family (both 49%) or with their partner (33% of repeat visitors, 27% of first time visitors).
- Repeat visitors stayed longer in the region than first time visitors (Median 8 nights versus 5 nights).
- Three in five repeat visitors to the Sapphire Coast had holidayed previously in the region outside of Summer. The majority were visitors travelling with their immediate family (52%) and visitors from Victoria (48%).
- More than half of visitors (54%) planned 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 (56%) and the internet (51%) were the main sources of information – both much higher proportions than the subgroup and all destination benchmarks.
- The internet was also the most popular source for booking (44%) – a higher proportion to the subgroup and the same as the all destination benchmarks.
- 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.

# Getting to and around the Sapphire Coast

- Transport used
- Locations visited

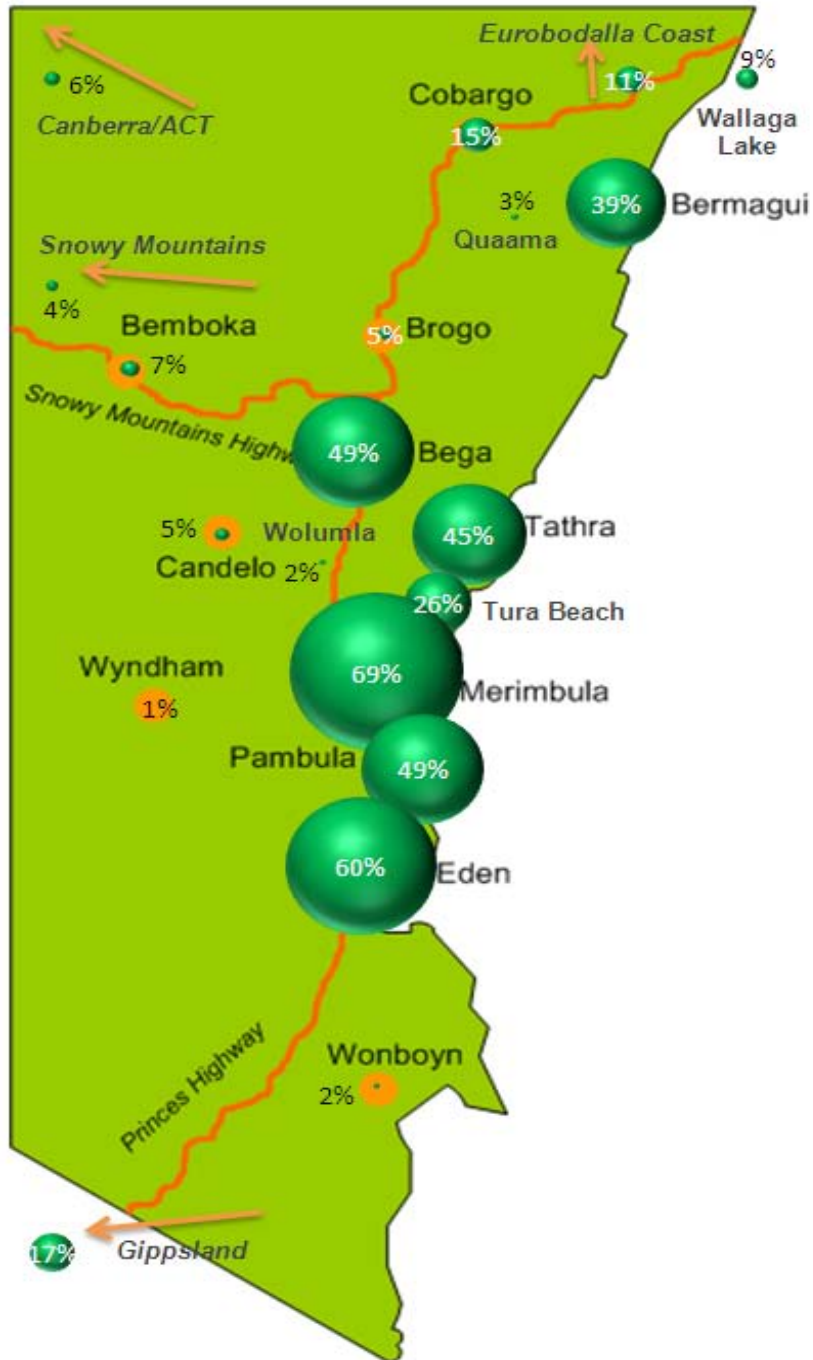
# The majority of visitors to the region were self drive



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

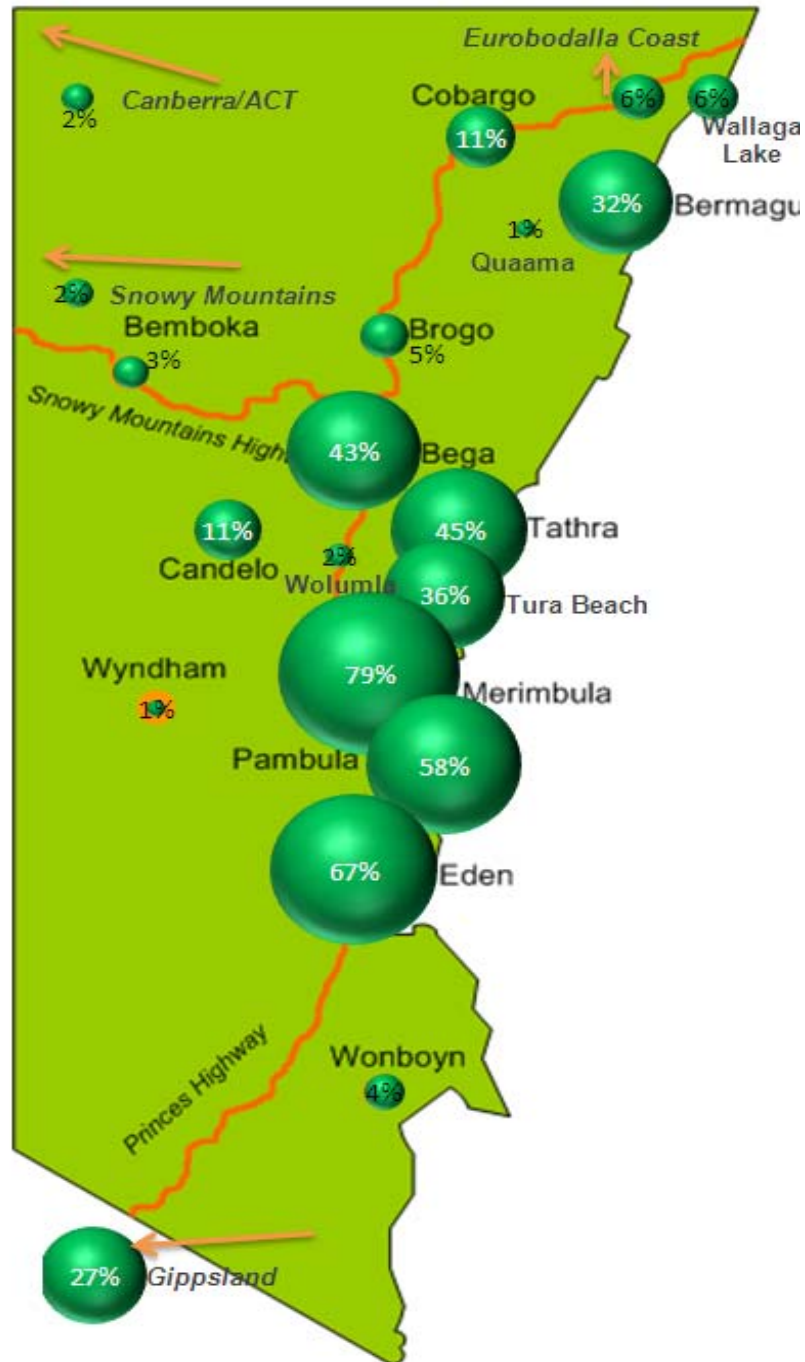


Median Number of Stops in the Sapphire Region = 4

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

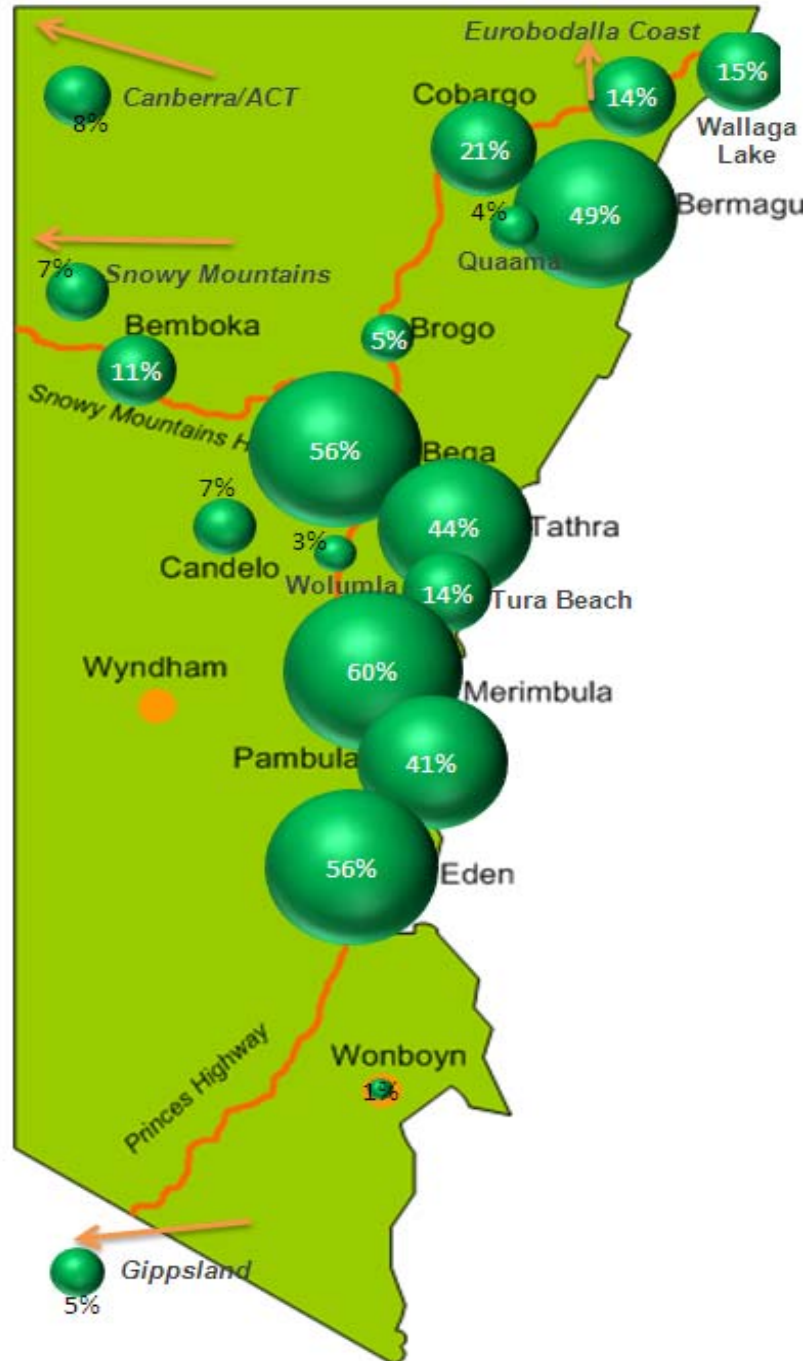


Median Number of Stops in the Sapphire Region = 4

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

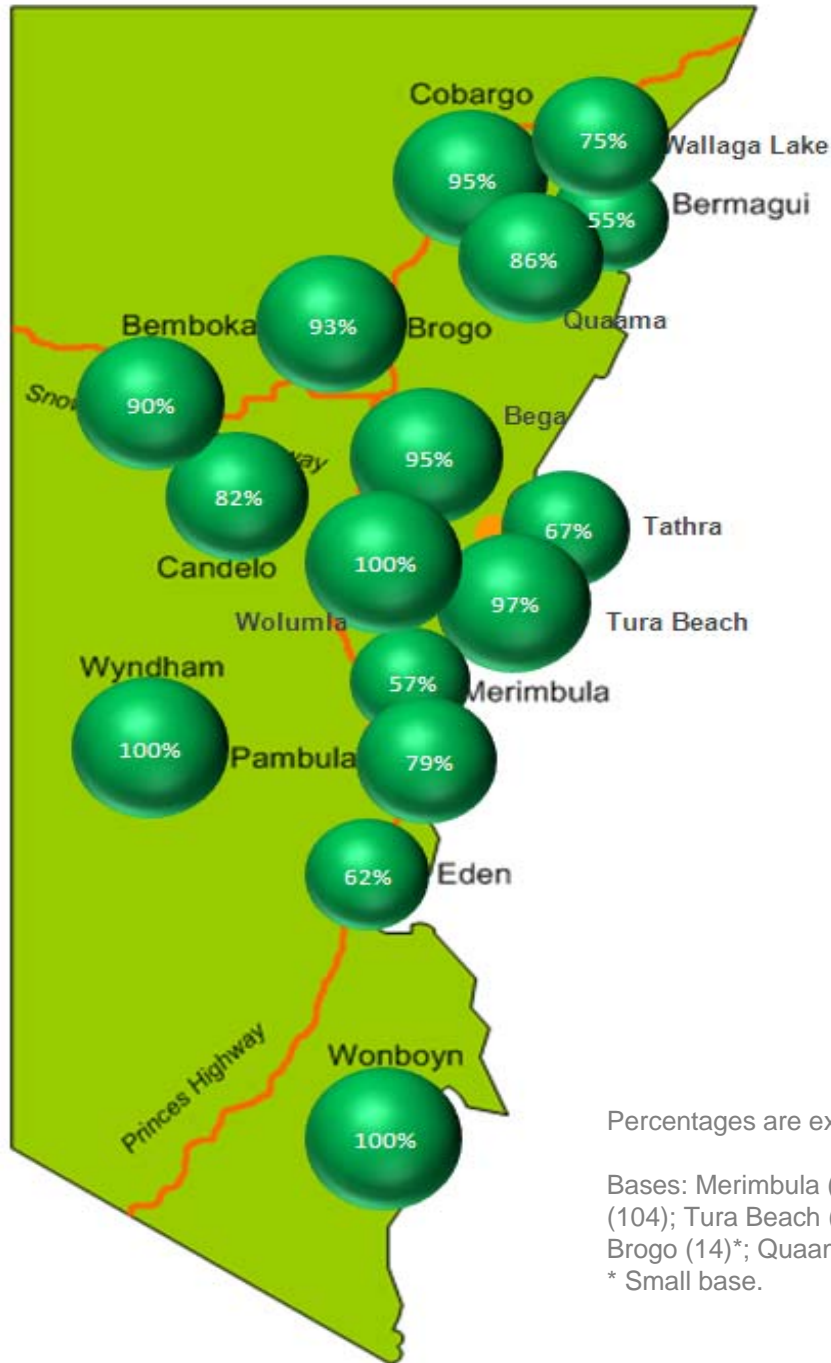


Base = 97

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?”*

# Towns visited during trip – day visit



Median Number of Day Stops in the Sapphire Region = 3

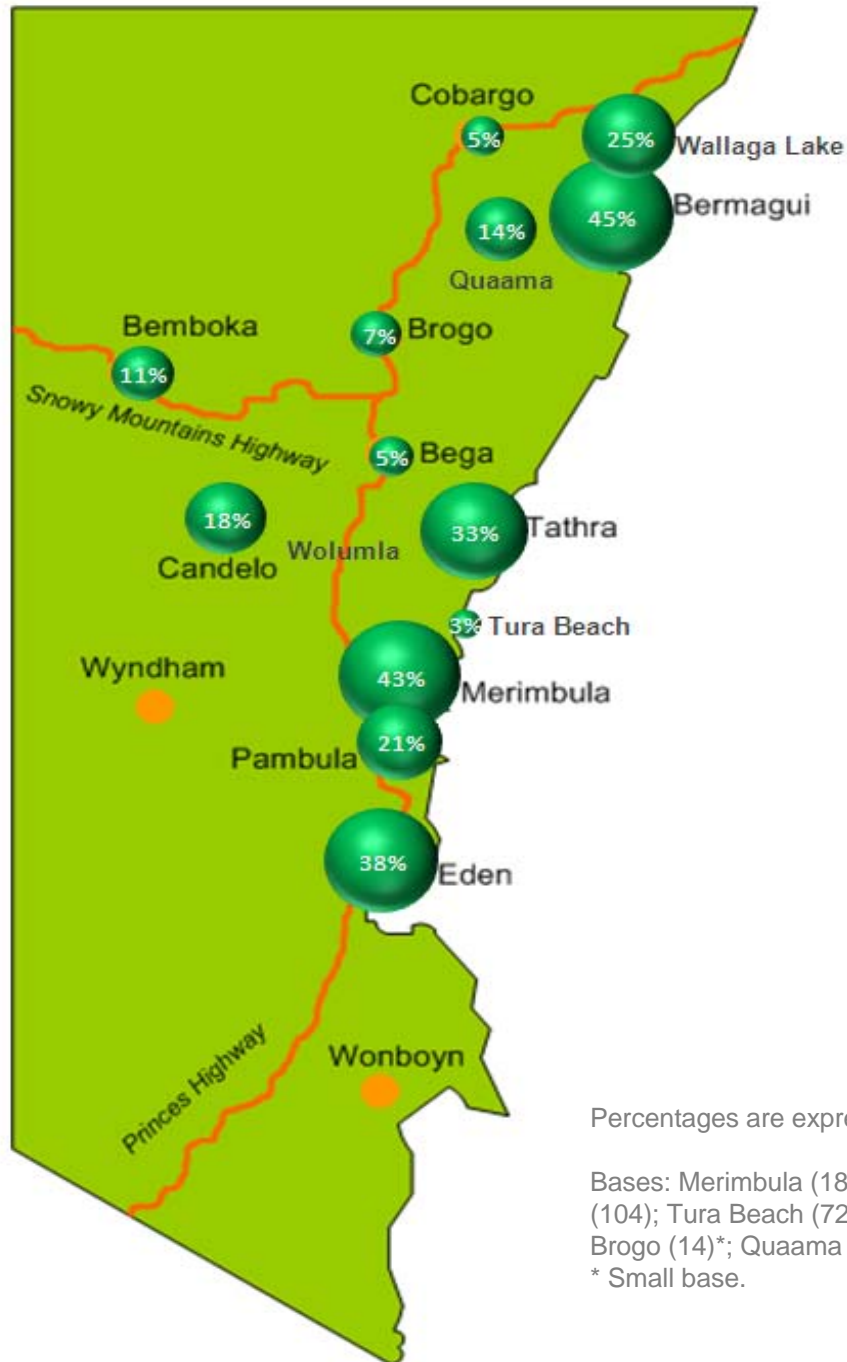
Percentages are expressed as the percentage of all visits (day and overnight) to each town.

Bases: Merimbula (188); Bega (131); Pambula (131); Tathra (120); Eden (160); Bermagui (104); Tura Beach (72); Cobargo (38)\*; Wallaga Lake (24)\*; Candelo (22)\*; Bemboka (19)\*; Brogo (14)\*; Quaama (7)\*; Wolumla (6)\*; Wonboyn (6)\*; Wyndham (3)\*.

\* Small base.

*"On this trip which, if any, of the following towns did you visit?"*

# Towns visited during trip – stopped overnight



- Median Number of Overnight Stops in the Sapphire Region = 1
- 86% of visitors who stopped overnight, only stopped overnight in one town

Percentages are expressed as the percentage of all visits (day and overnight) to each town.

Bases: Merimbula (188); Bega (131); Pambula (131); Tathra (120); Eden (160); Bermagui (104); Tura Beach (72); Cobargo (38)\*; Wallaga Lake (24)\*; Candelo (22)\*; Bemboka (19)\*; Brogro (14)\*; Quaama (7)\*; Wolumla (6)\*; Wonboyn (6)\*; Wyndham (3)\*.

\* Small base.

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

# Summary

- The majority of visitors (99%) to the region were self drive.
- The median number of day stops in the region was 3 and the median number of overnights stops was 1 - the majority of visitors (86%) who stopped overnight only stopped overnight in one town in region
- Merimbula and Eden were the most popular places to stop at in the region with 69% of visitors stopping at Merimbula and 60% of visitors stopping at Eden during their trip.
- Of those who stopped at Eden, 62% stopped during the day and 38% stopped for one night or more. Visitors to Eden mainly stayed overnight in Merimbula (40%), Bermagui (35%) or Eden (33%). Overnight visitors to Eden also visited Pambula (39%) and Bega (36%).
- Of those who stopped at Merimbula, 57% stopped during the day and 43% stopped for one night or more. Visitors to Merimbula mainly stayed overnight in Merimbula (45%), Eden (33%) or Tathra (31%). Overnight visitors to Merimbula also visited Tura Beach (43%) and Pambula (45%).
- Other popular day stops in the region included Tura Beach (97%), Bega (95%) and Pambula (79%). Popular overnight stops in the region included Bermagui (45%), Merimbula (43%) and Eden (38%).

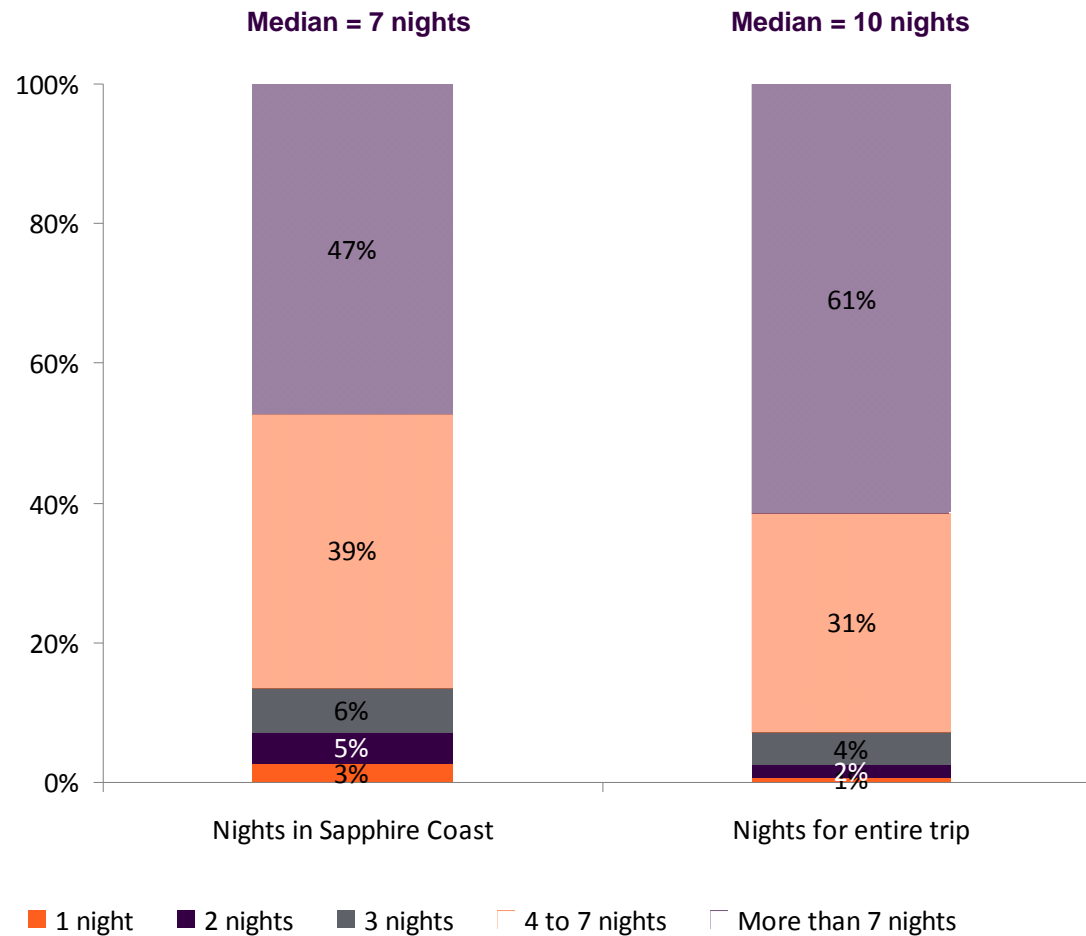
# Summary

- Merimbula was the most popular stop for visitors from all states with the majority of visitors from Victoria (79%), New South Wales (60%) and the Australian Capital Territory (56%) stopping there.
- Visitors from Victoria were more likely to stop at the southern towns of Merimbula (79%), Eden (67%), Pambula (58%) and Tura Beach (36%) than visitors from New South Wales.
- Visitors from New South Wales were more likely to stop at the northern towns of Bega(56%), Bermagui (49%), Cobargo (21%), Wallaga Lake (15%) and Bemboka (11%) than visitors from Victoria.
- Visitors from the Australian Capital Territory were more likely to stop at Tathra (52%) than visitors from New South Wales and Victoria.
- Merimbula was also a favoured overnight stop for visitors to use as a hub from which to visit other towns in the region. Over a third of visitors to the other towns stayed in Merimbula overnight (45% Pambula, 43% Tura Beach, 40% Eden, 37% Tathra, 35% Bega, 33% Bermagui).

# Staying in the Sapphire Coast

- Length of stay
- Accommodation used
- Profile of different accommodation users
- Expenditure

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



Base = 264

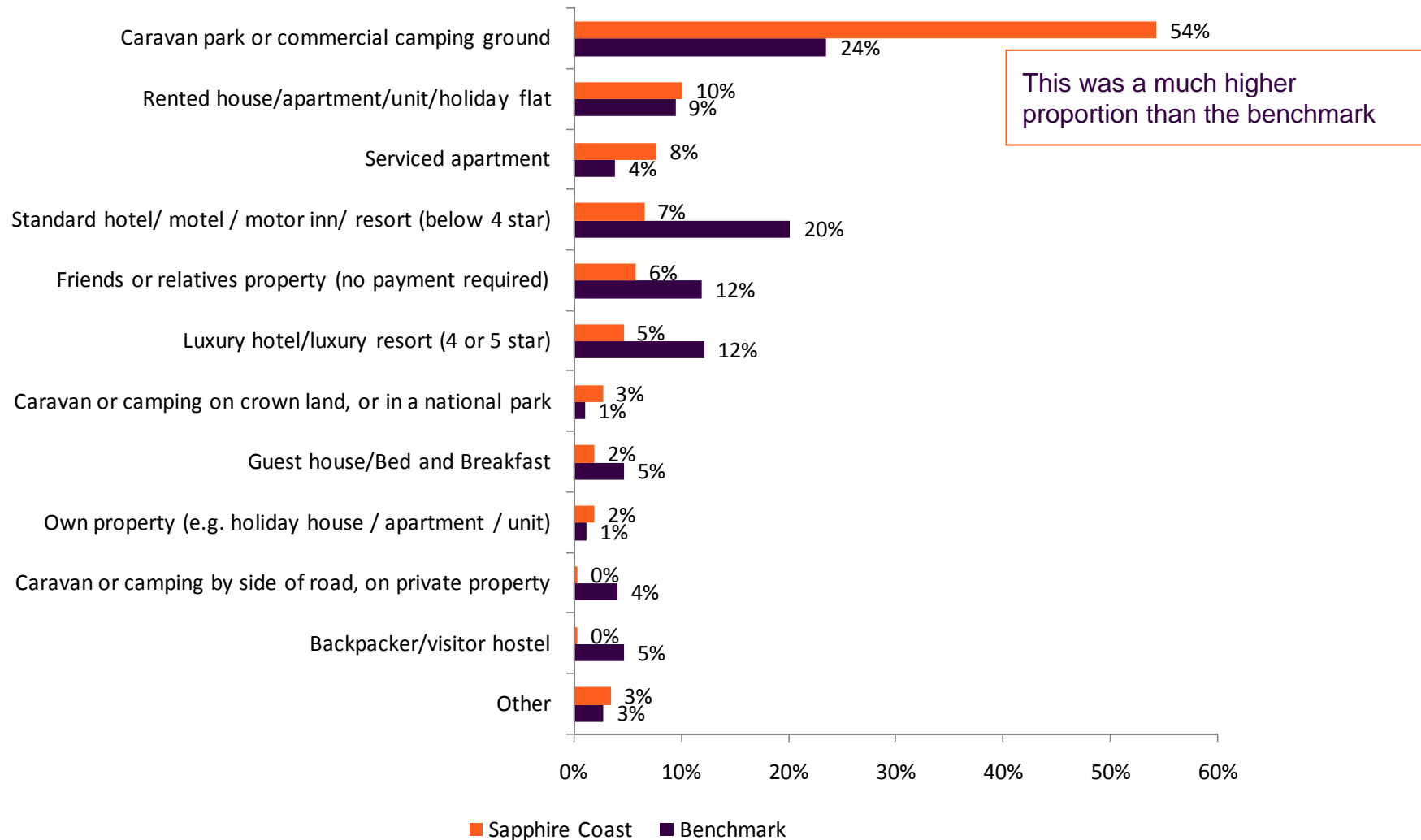
Base = 267

*"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?"*

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

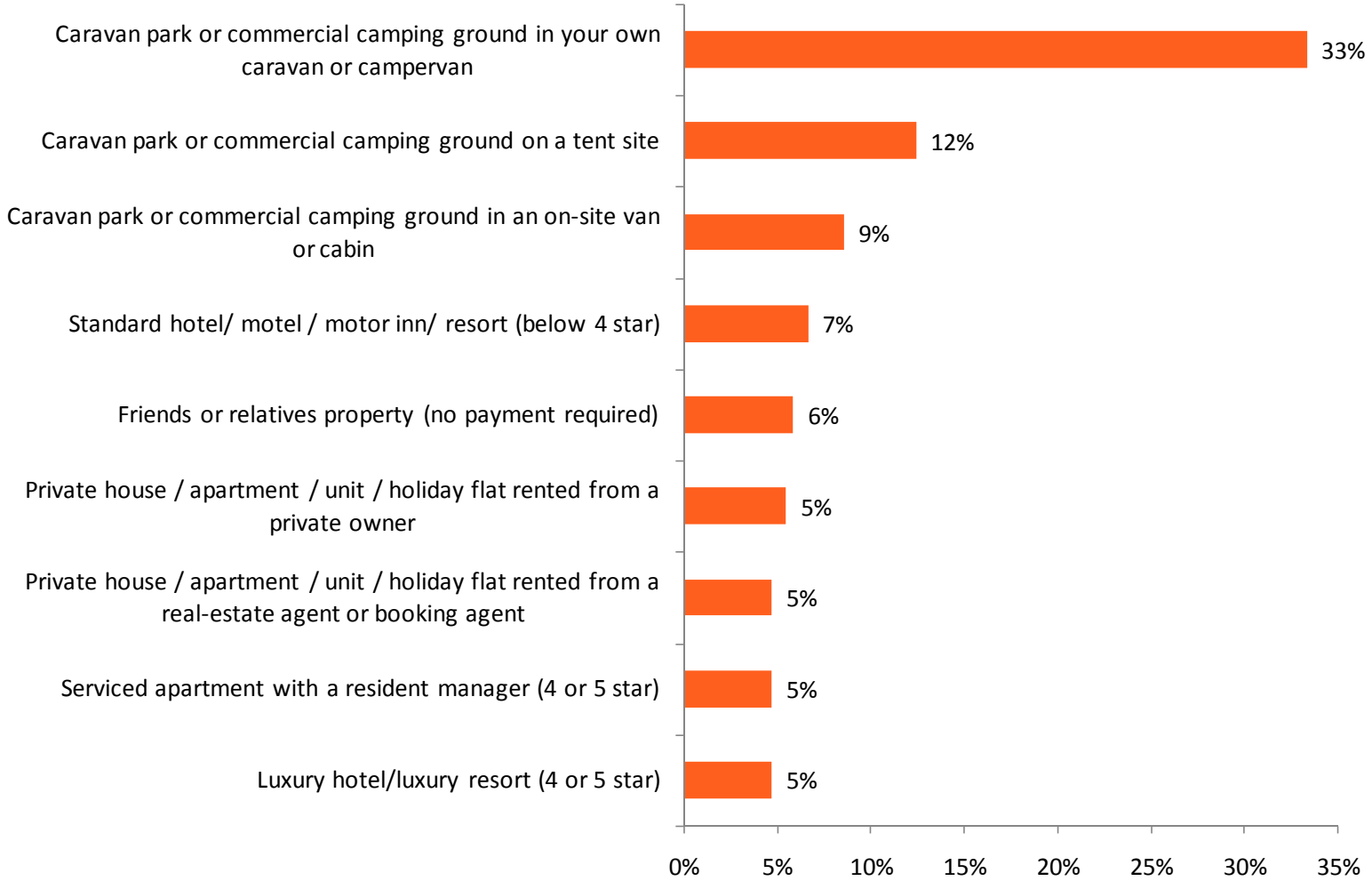
# Over half of visitors stayed at commercial caravan or camping grounds



Base = 258

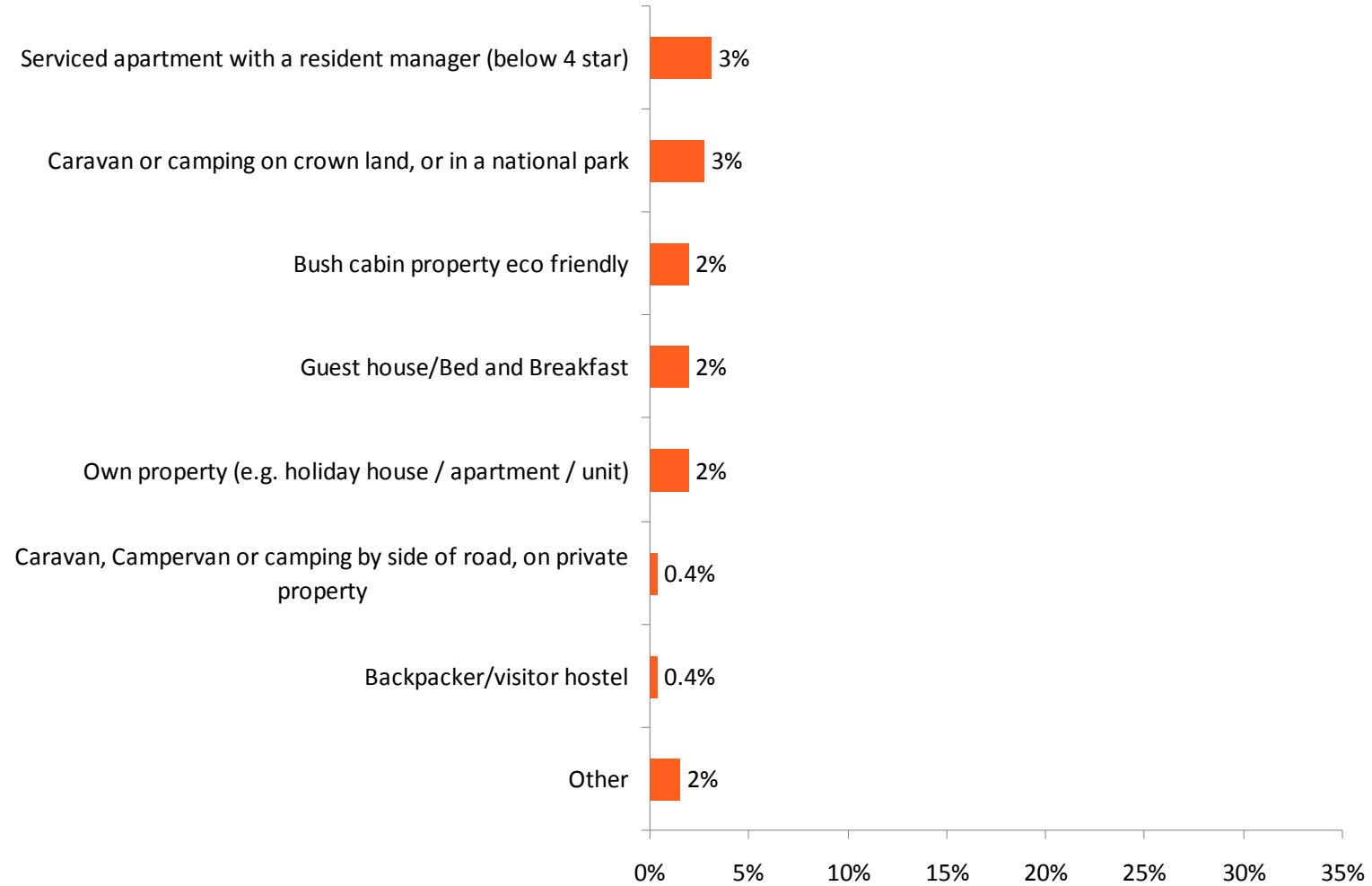
*“What type of accommodation did you mainly use in the Sapphire Coast?”*

# 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

	<b>Commercial caravan or camping in: Own van (33%)</b>	<b>Commercial caravan or camping in: Tent site (12%)</b>	<b>Commercial caravan or camping in: On site van or cabin (9%)</b>
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

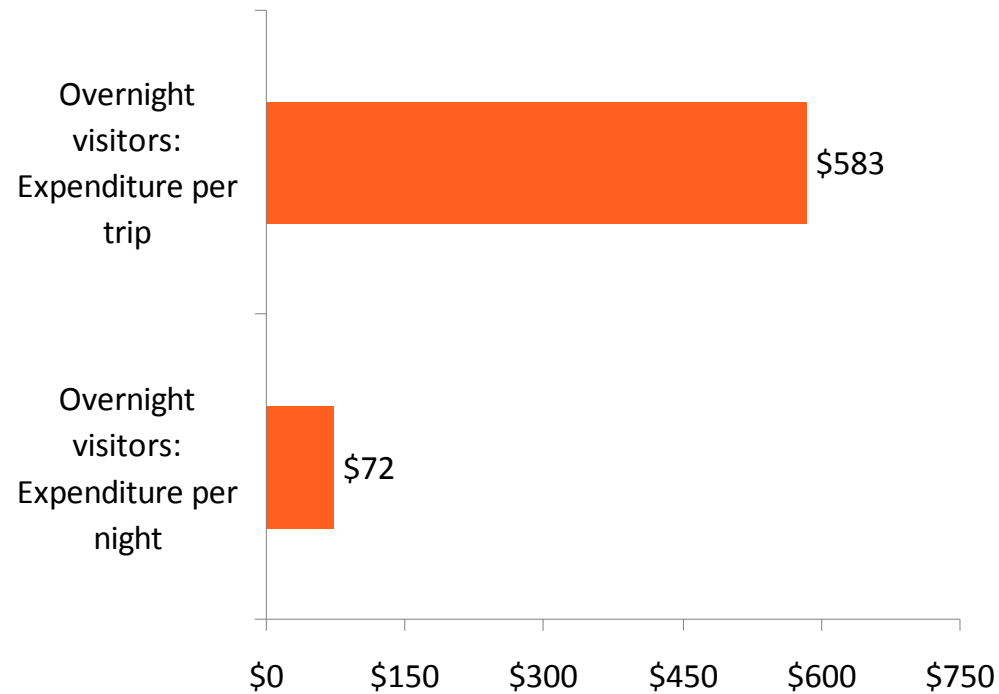
# Profile of different accommodation users

	<b>Hotel, motel, resort (Standard or luxury) (11%)</b>	<b>Rented house/ apartment (10%)</b>	<b>Serviced apartment (8%)</b>
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

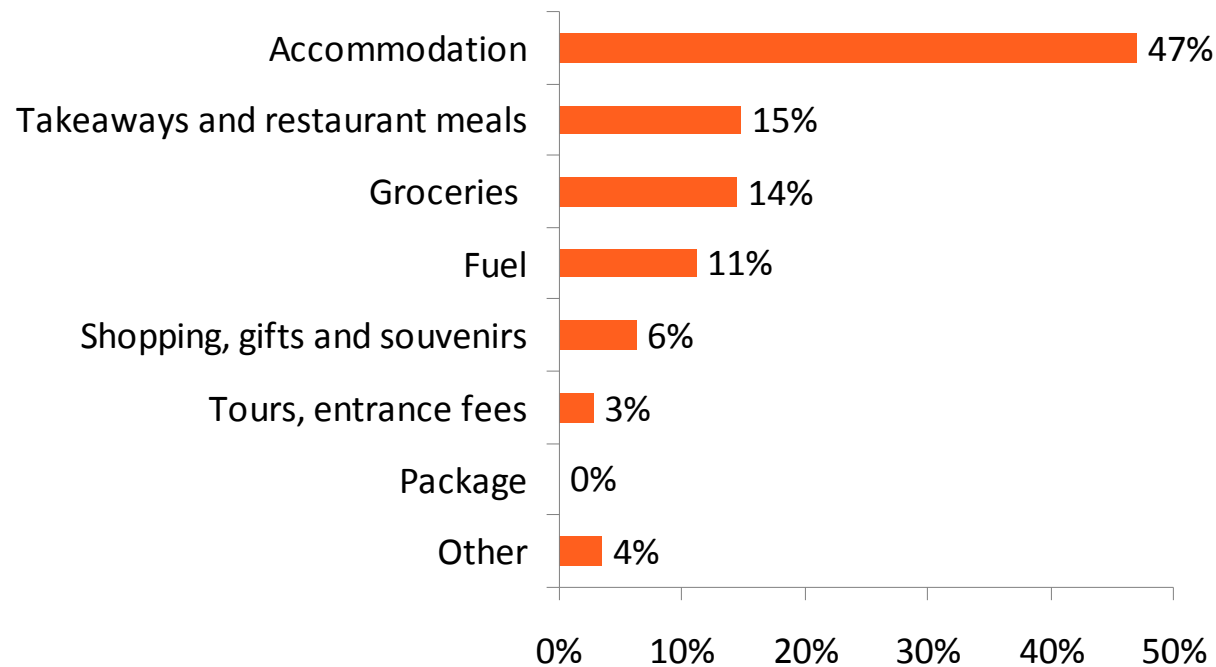
# Overnight visitors spent about \$72 per night



Base = 403  
Note: From recruitment data file

*“How much have you spent so far in the Sapphire Coast, including any money paid before the trip, and excluding any package expenditure?”*  
*“How much do you think you will spend in the Sapphire Coast for the remainder of your stay excluding any package expenditure?”*

# Nearly half of the expenditure in the region was on accommodation



Base = 403

Note: From recruitment data file

*"How much have you spent so far in the Sapphire Coast, including any money paid before the trip, and excluding any package expenditure?"*  
*"How much do you think you will spend in the Sapphire Coast for the remainder of your stay excluding any package expenditure?"*

# Summary

- The majority of visitors (97%) stopped at least one night in the Sapphire Coast region.
- The median stay was 7 nights, which was also the median stay for visitors staying in an onsite van or cabin at a commercial caravan park or camping ground, and visitors staying in a rented house/apartment. The median stay for visitors staying in their own van at a commercial caravan park or camping ground was twice as long (14 nights).
- Commercial caravan or camping accommodation was the most common accommodation with 54% of visitors staying there. This was a higher proportion than both the subgroup and all destination benchmarks.
- Staying in an onsite van or cabin at a commercial caravan park or camping ground was also the most common accommodation for visitors travelling with families (68%), where as repeat visitors mainly stayed in their own van at a commercial caravan park or camping ground (93%).
- Visitors who stayed at least one night spent \$72 per night on average. The majority of the expenditure was on accommodation and meals.

# Why they visited the Sapphire Coast and were they happy



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

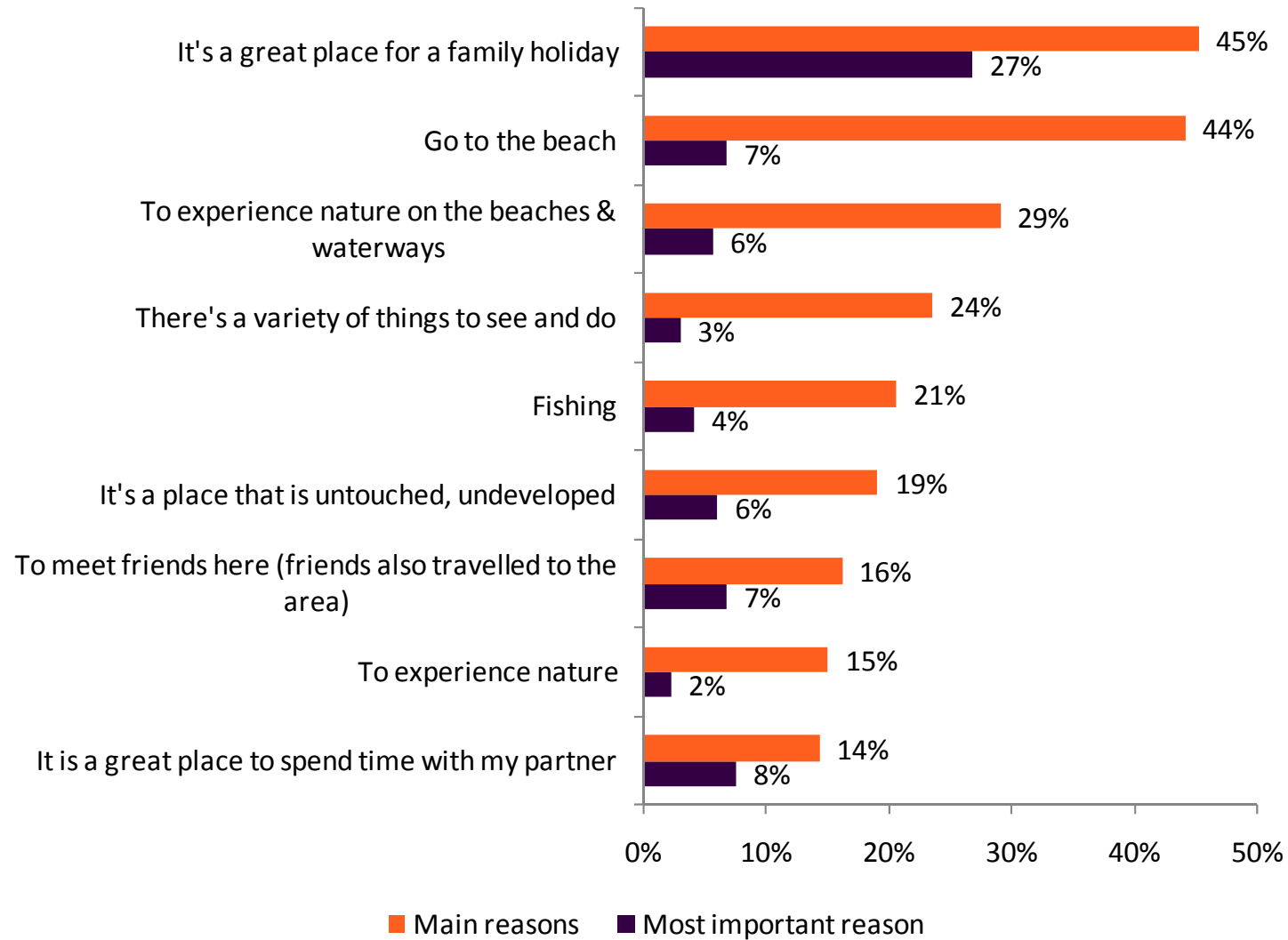


**TRA** TOURISM  
RESEARCH  
AUSTRALIA

# Reasons for visiting the Sapphire Coast

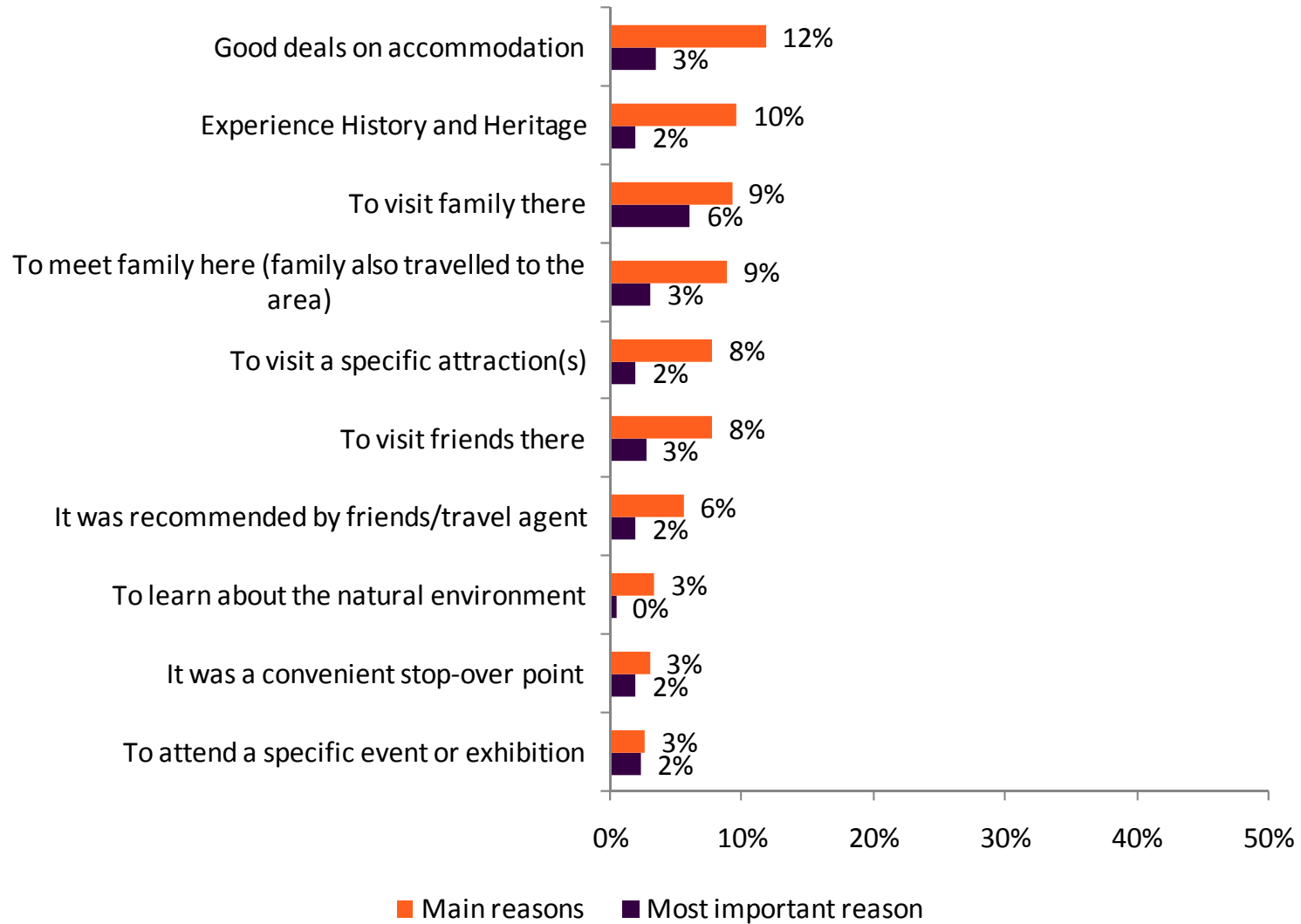
- Reasons for choosing destination
- Expectations of experiences

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



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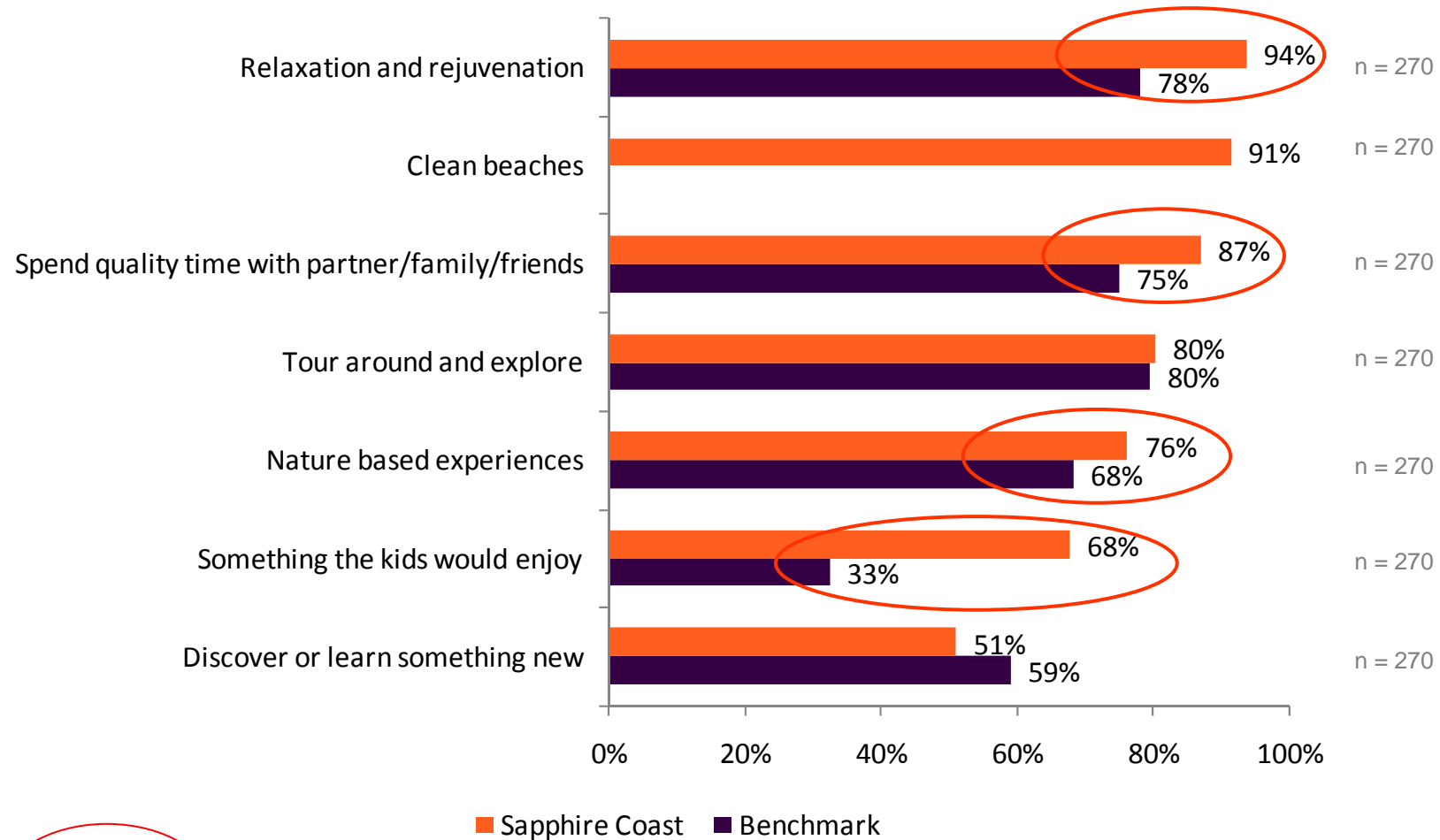
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Bases: All respondents Main Reason = 272  
All respondents Most important = 265

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

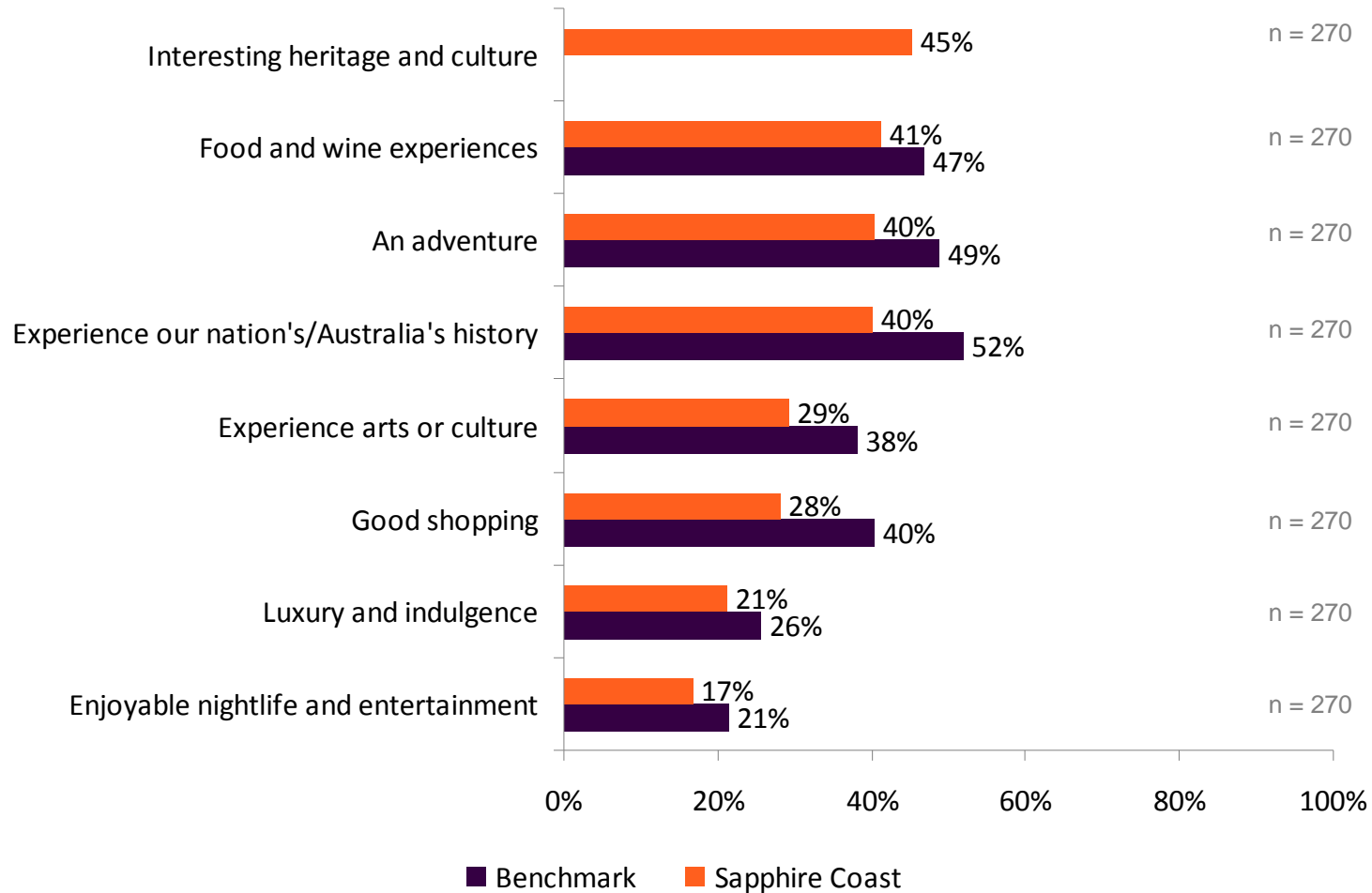
# Expectations for relaxing, spending time with others, nature and something for the kids were above the benchmark



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?"*

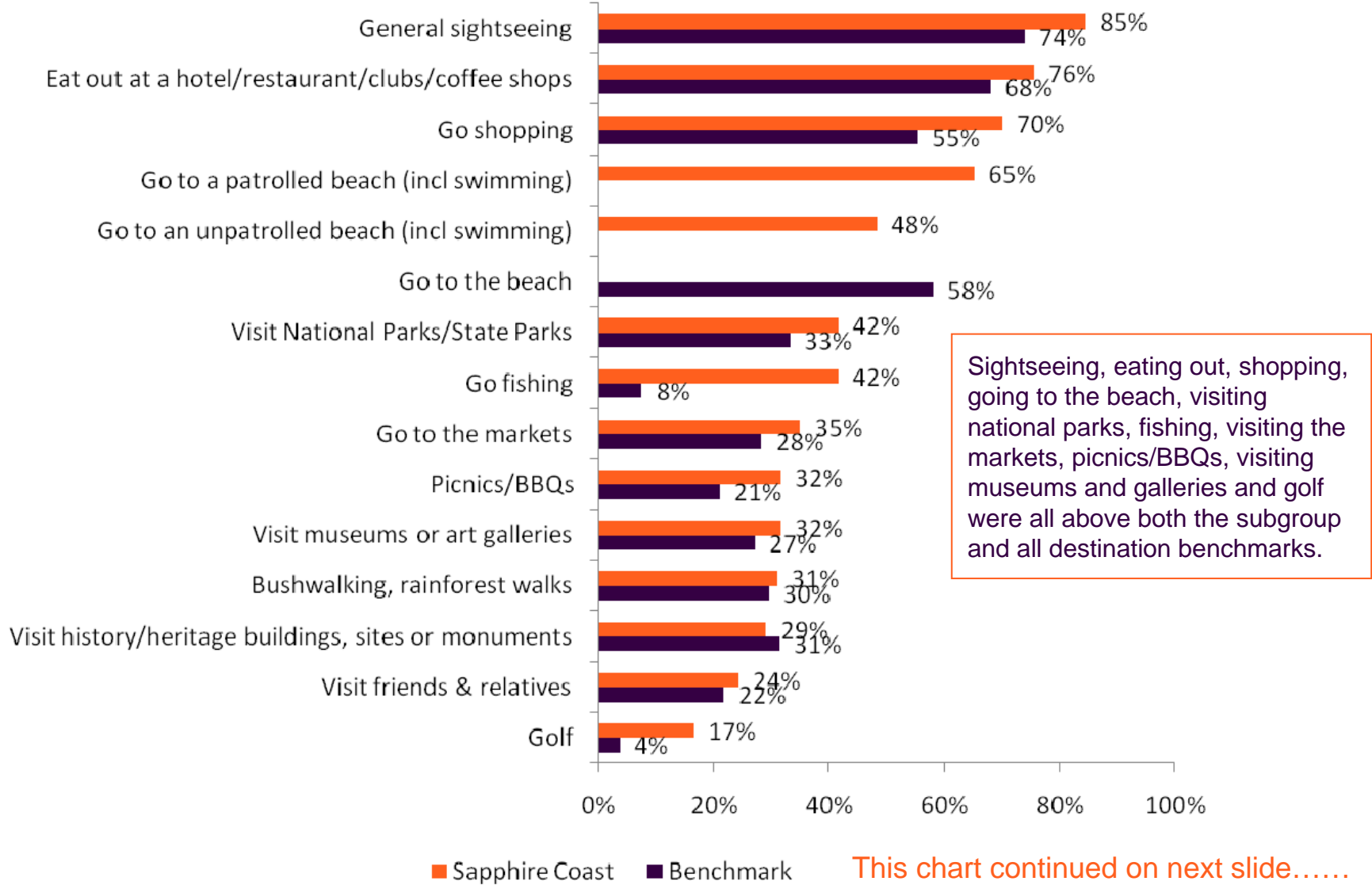
# Summary

- The main reason for visiting the Sapphire Coast region was because it was a great place for a family holiday with 45% of visitors giving this as a reason for visiting.
- Other reasons included to go to the beach (44%), to experience nature on the beaches and waterways (29%), because there was variety of things to see and do (24%) and fishing (21%).
- The main experiences expected by visitors were to relax and rejuvenate (94%), clean beaches (91%) and to spend quality time with partner/family/friends (87%). These experiences were above the subgroup and all destination benchmarks.
- Nature based experiences (76%) and something the kids would enjoy (68%) were also experiences where expectations were above the subgroup and all destination benchmarks.

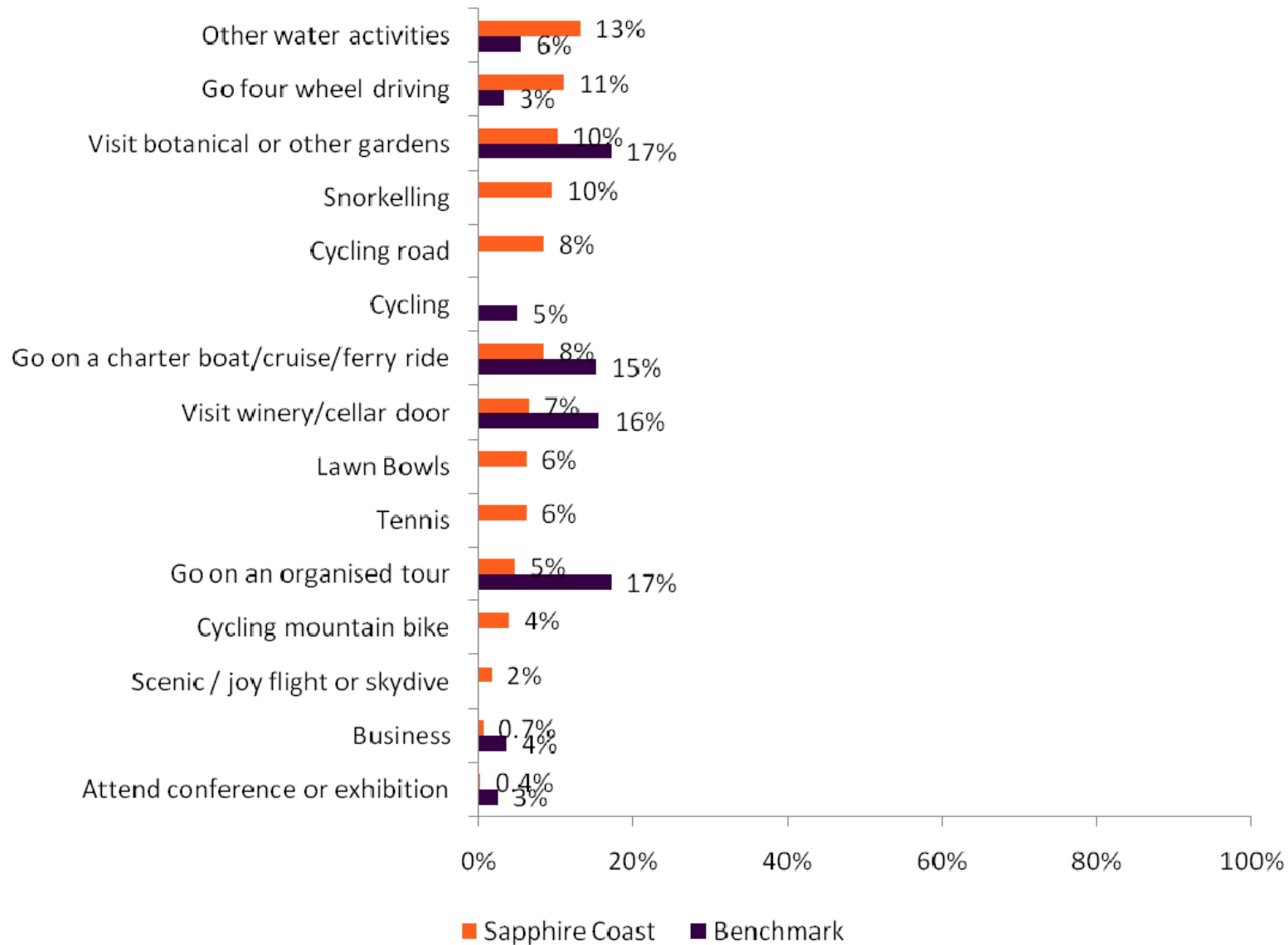
# What did they do in the Sapphire Coast?

- Activities
- Attractions

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



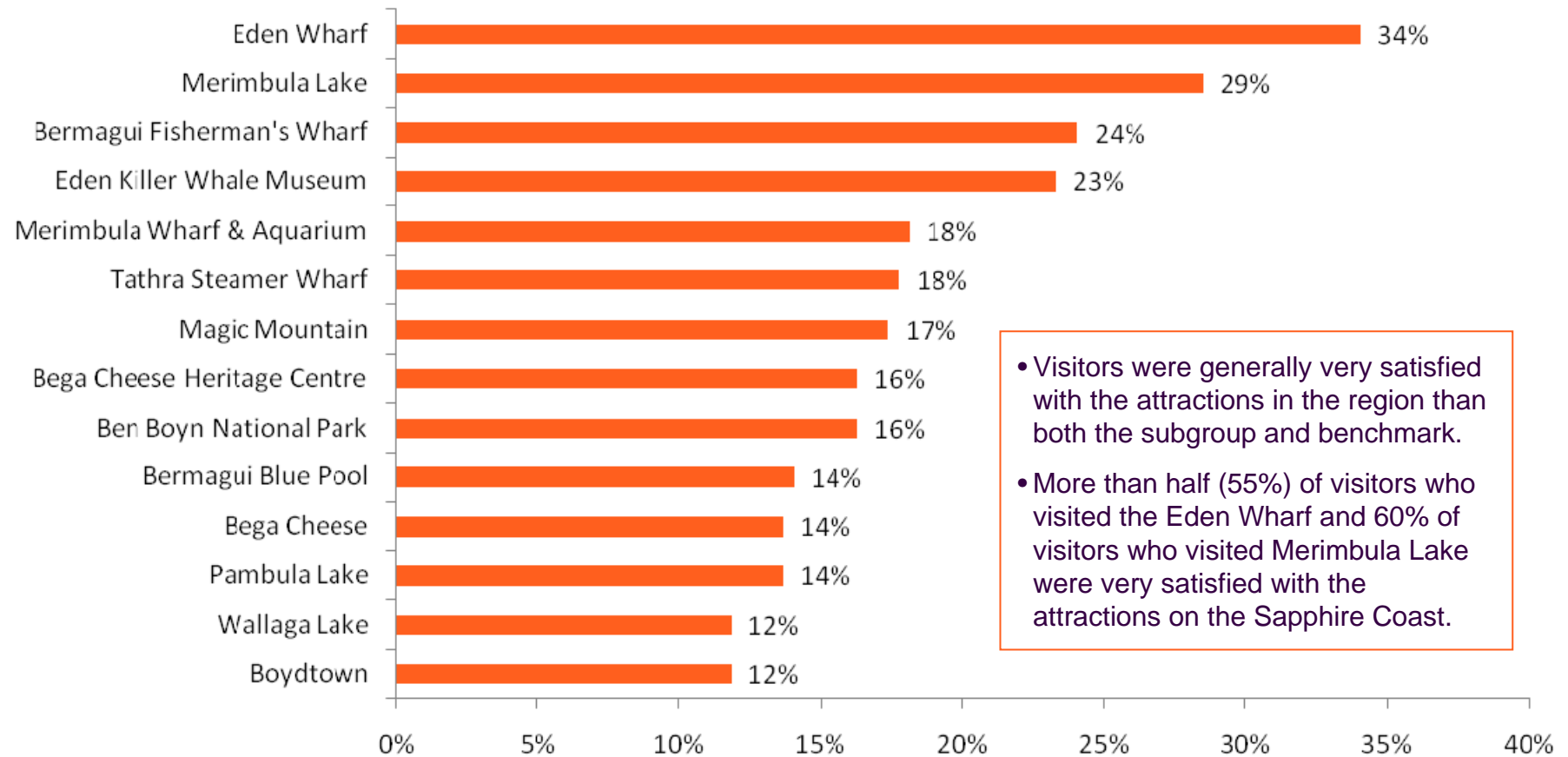
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Base = 271

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

# The Eden Wharf and Merimbula Lake were the most visited attractions

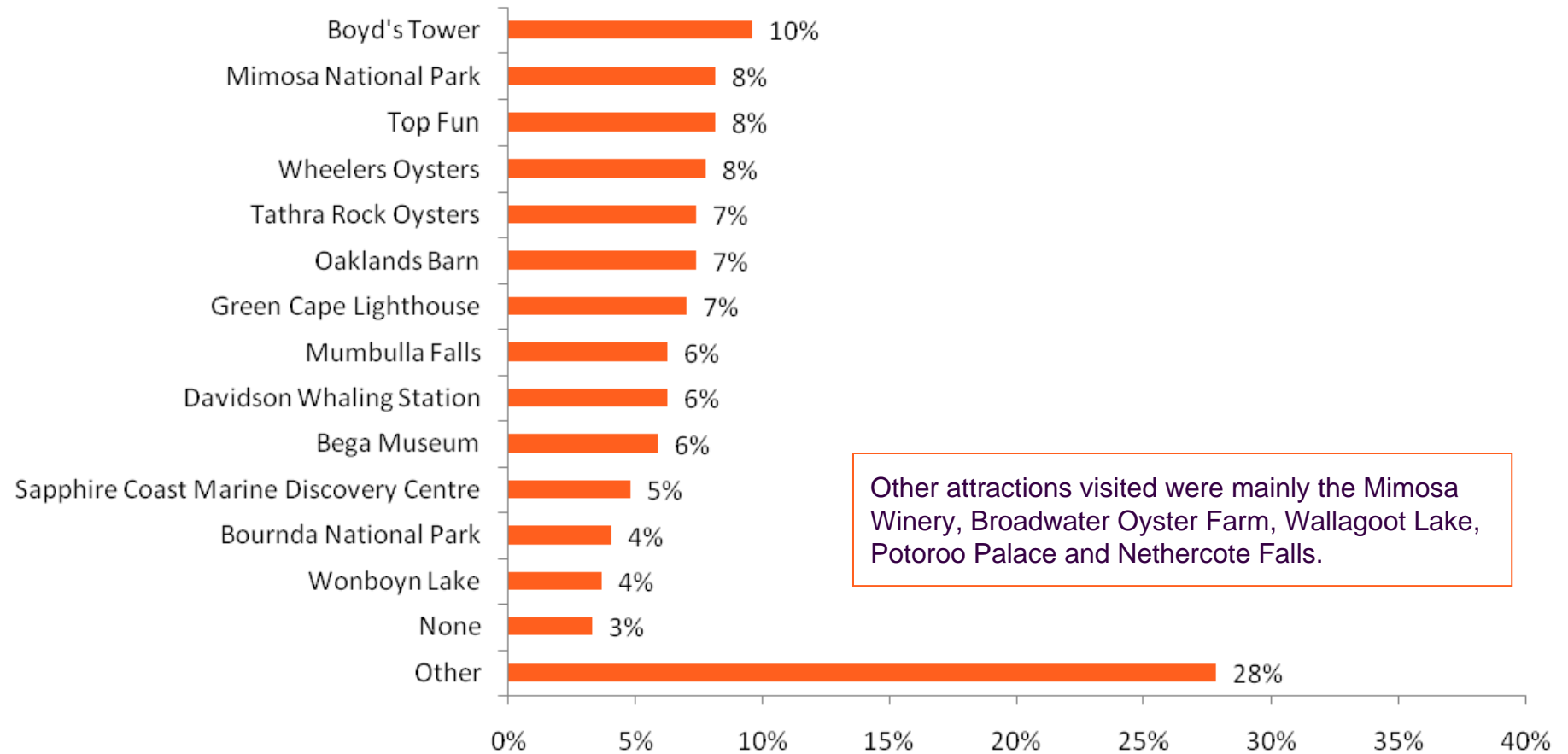


Base = 270

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

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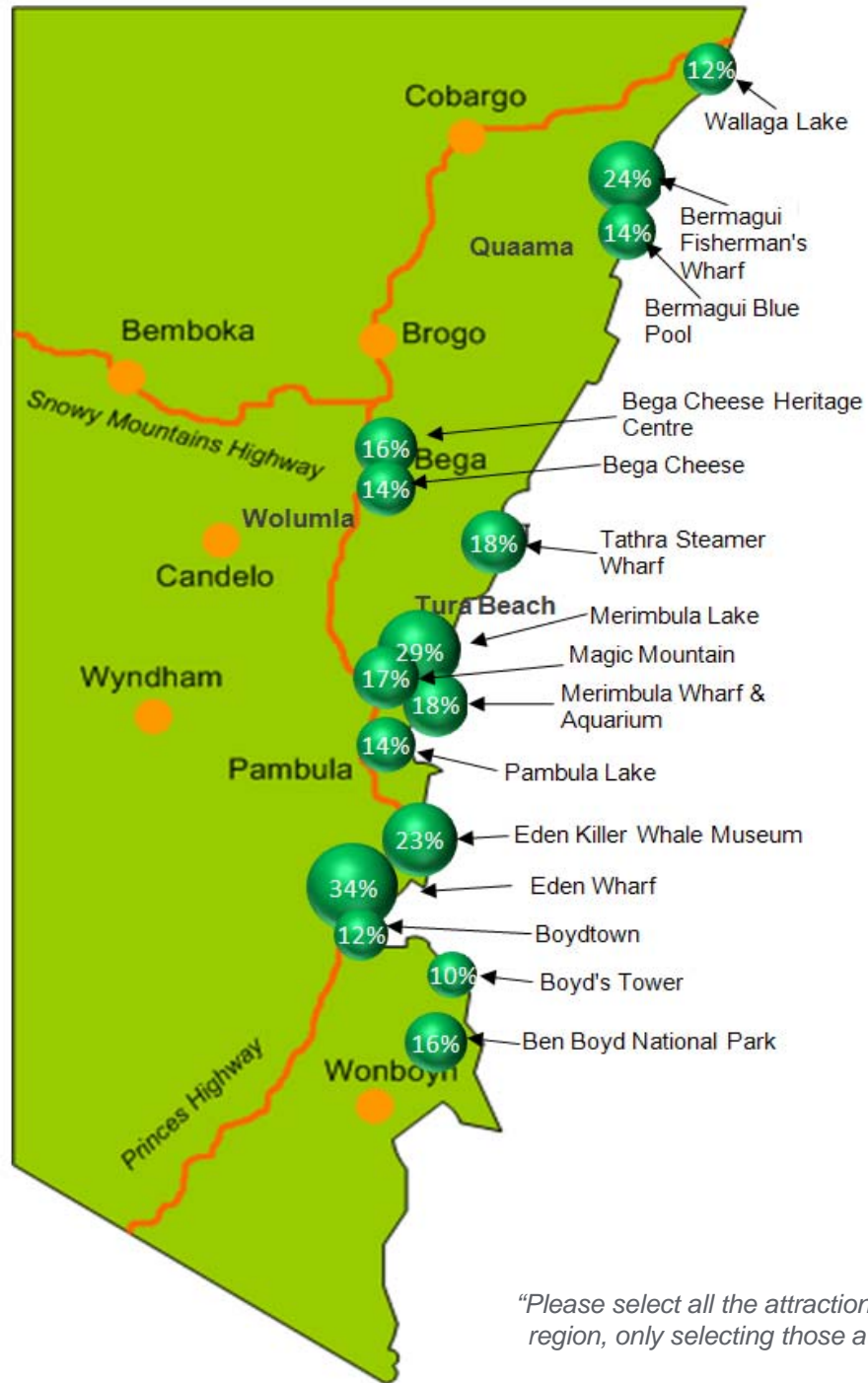
## ... continued from previous slide



Base = 270

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

# Attractions visited



Base = 270

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

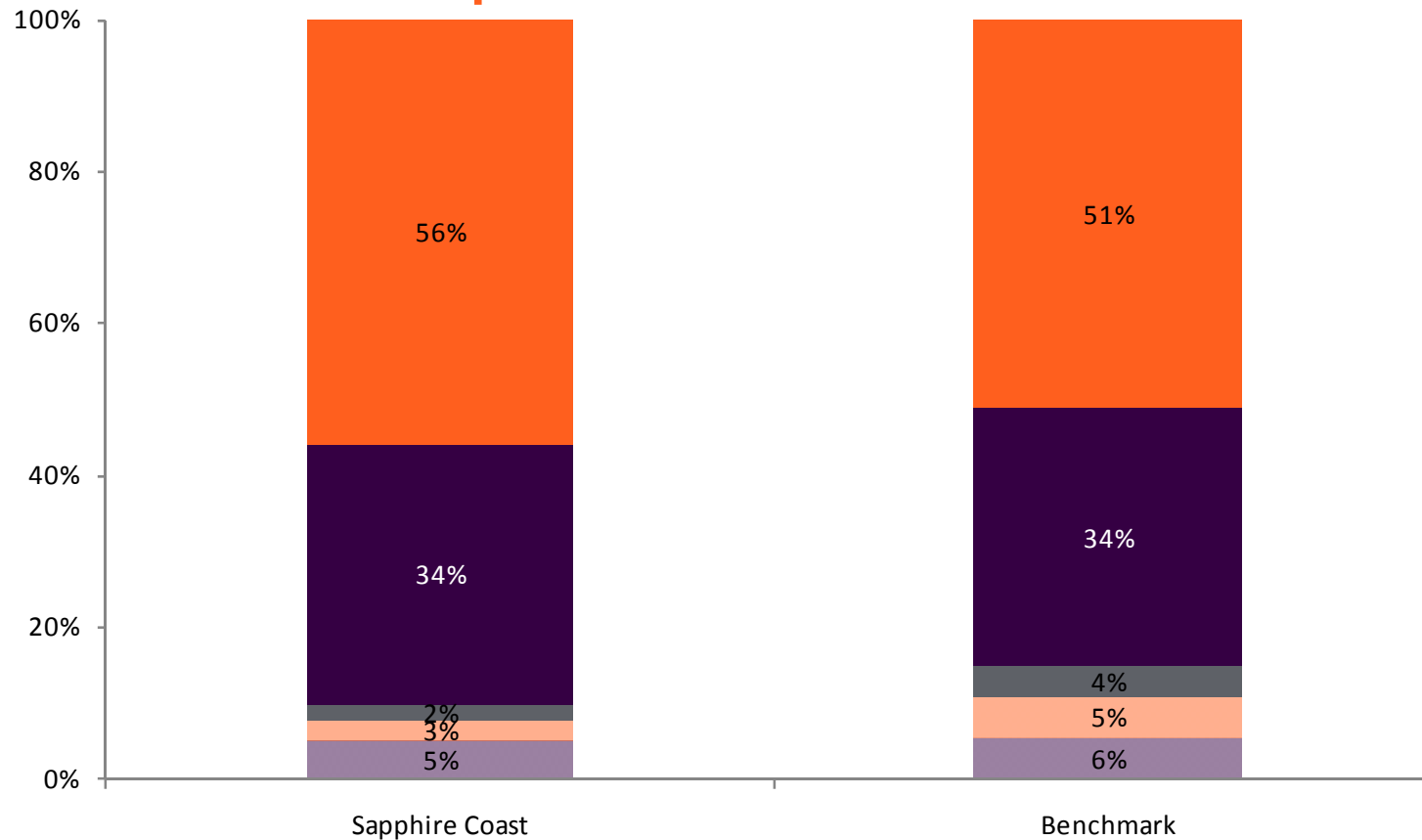
# Summary

- The most popular activities for visitors to the Sapphire Coast were sightseeing (85%), eating out (76%), shopping (70%) and going to a patrolled beach (65%).
- The majority of activities including going to the beach (83%), fishing (42%), golf (17%), picnics/BBQs (32%) and sightseeing (85%) were all above both the subgroup and all destination benchmarks.
- The most popular attractions visited were the Eden Wharf (34%) and Merimbula Lake (29%).
- Other commonly visited attractions included the Bermagui Fisherman's Wharf (24%), Eden Killer Whale Museum (23%), Merimbula Wharf & Aquarium (18%), Tathra Steamer Wharf (18%) and Magic Mountain (17%).
- Visitors to the Eden Wharf and Merimbula Lake were more likely to be very satisfied with the attractions than both the subgroup and benchmark. More than half (55%) of visitors who visited the Eden Wharf and 60% of visitors who visited Merimbula Lake were very satisfied with the attractions on the Sapphire Coast.

# Visitor satisfaction in the Sapphire Coast

- Overall satisfaction
- Were expectations met
- Importance of destination attributes
- Satisfaction with destination attributes
- Recommendation
- Revisitation

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



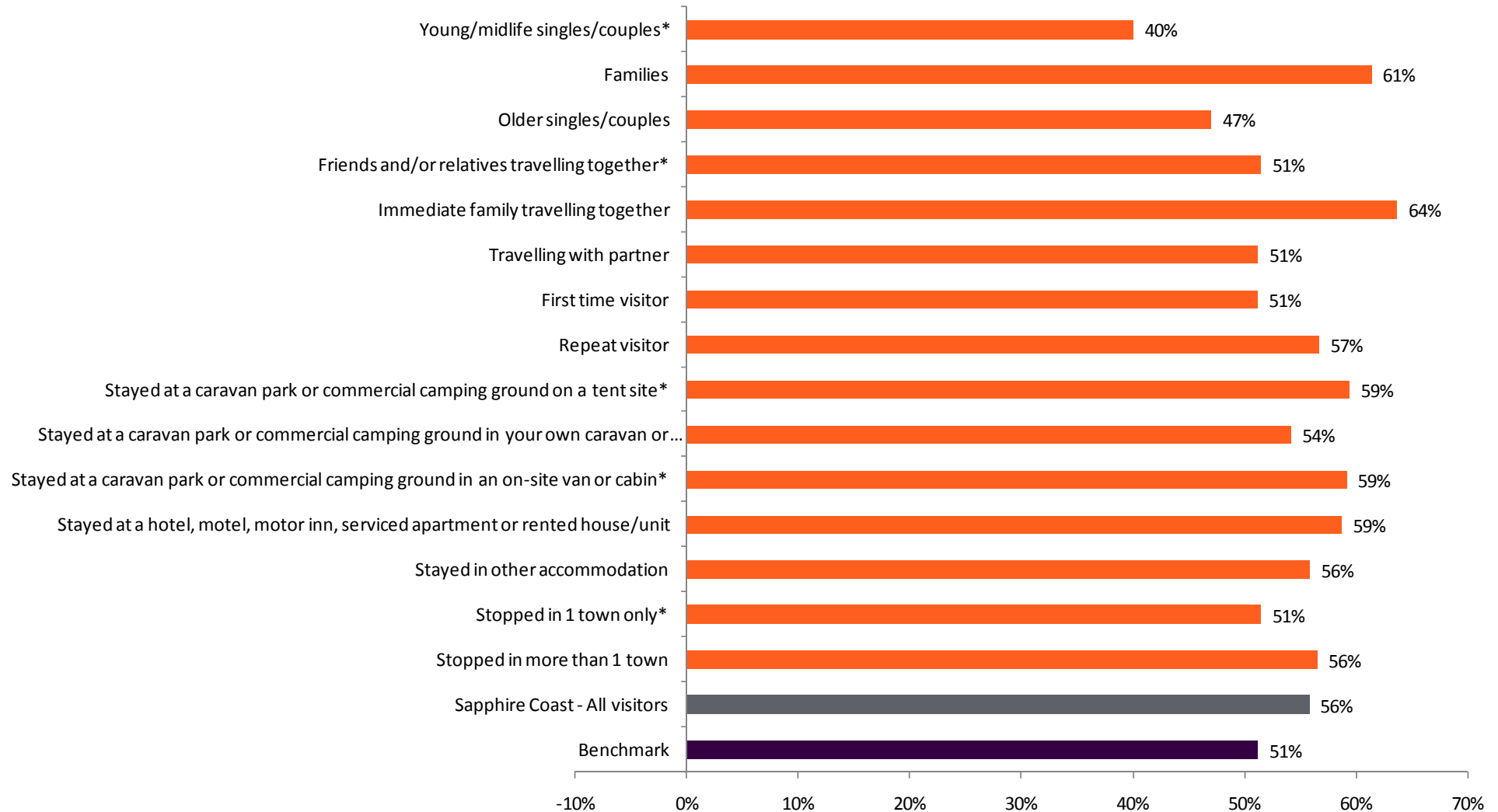
■ Very dissatisfied  
 ■ Fairly dissatisfied  
 ■ Neither satisfied nor dissatisfied  
 ■ Fairly satisfied  
 ■ Very satisfied

Key Metrics	Total Sat	V Sat	Total Dis
<b>Overall Satisfaction</b>	<b>90%</b>	<b>56%</b>	<b>8%</b>
Difference to subgroup	↑ 5%	↑ 5%	↓ -4%
Difference to all	↑ 5%	↑ 5%	→ -3%

Base = 271

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

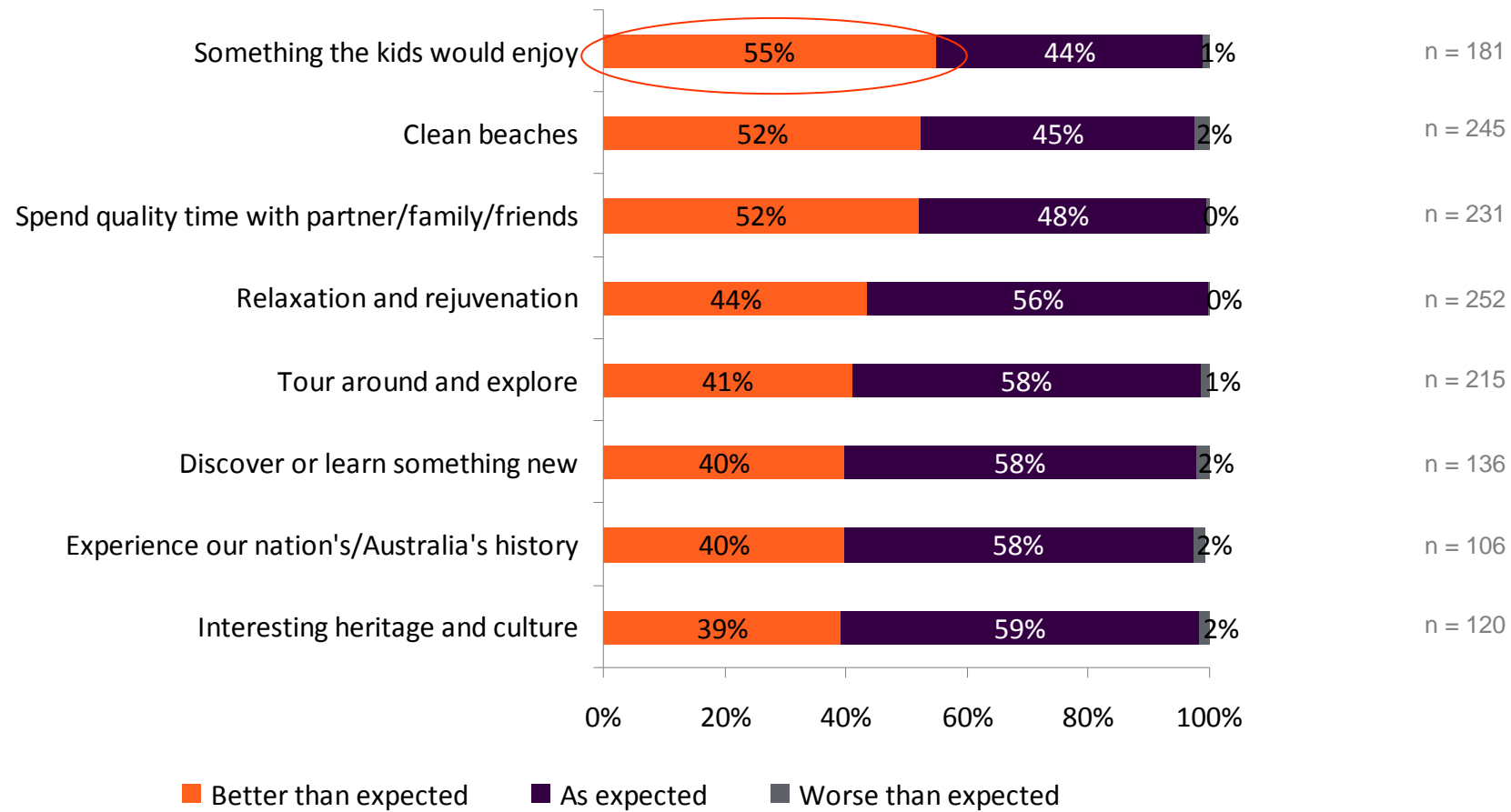
# Overall satisfaction was very high for families travelling together



\* Small Base

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

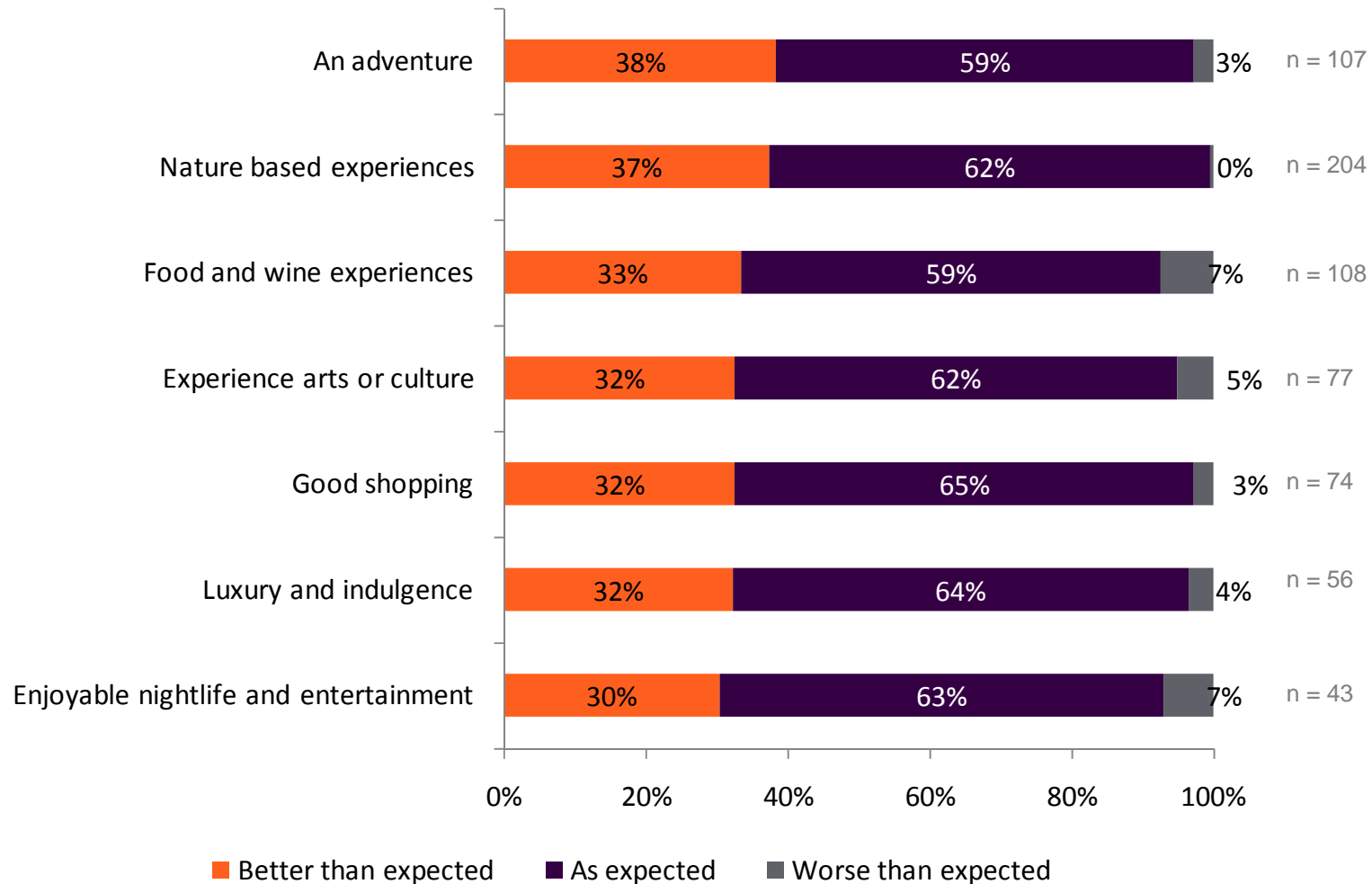
# Expectations were better than expected for something for the kids compared with the benchmark



Greater than the VPS benchmark

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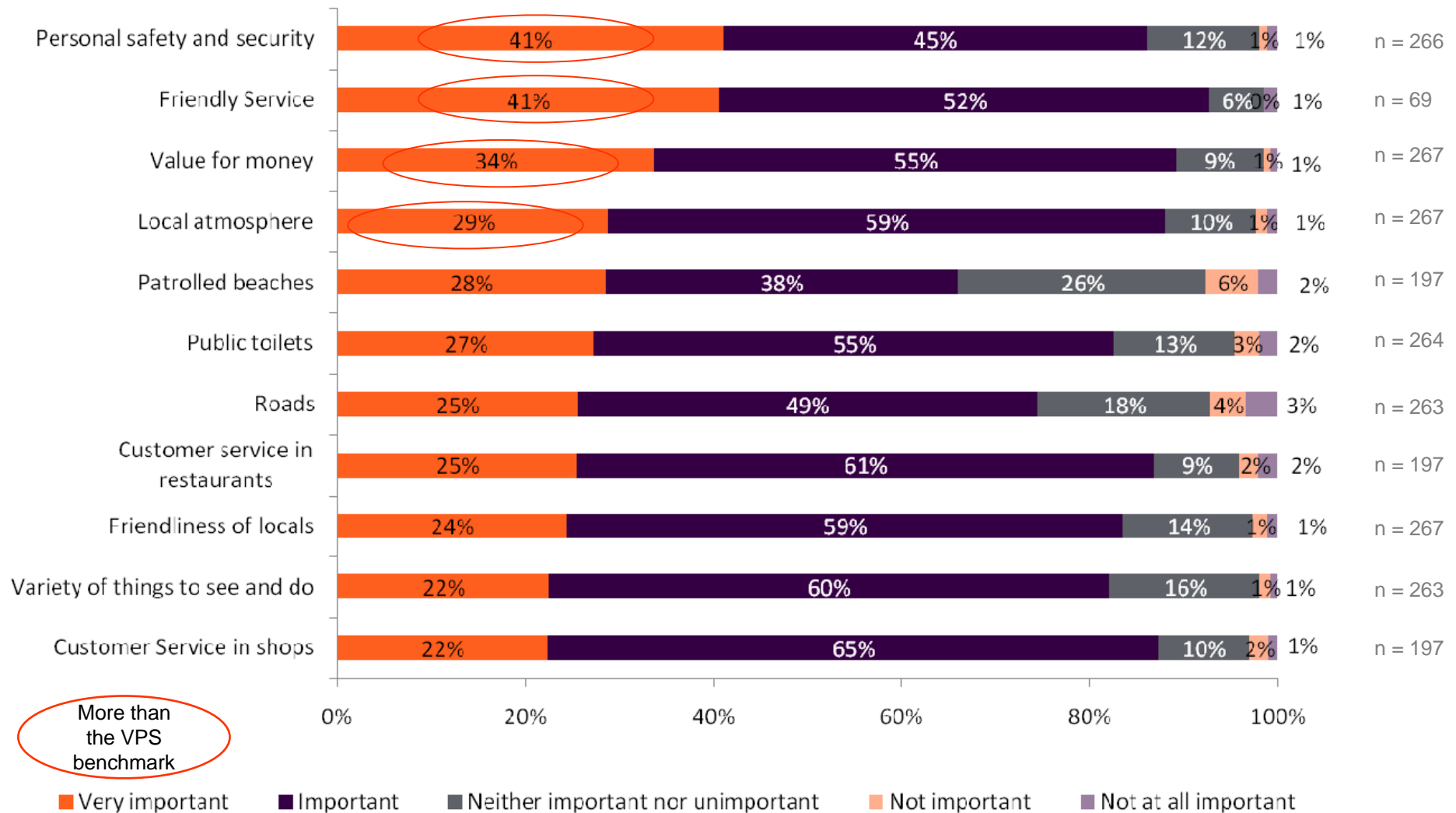


*“Which, if any, of the experiences listed below did you expect the Sapphire Coast to offer? If you answer YES, please indicate how well the region met this expectation.”*



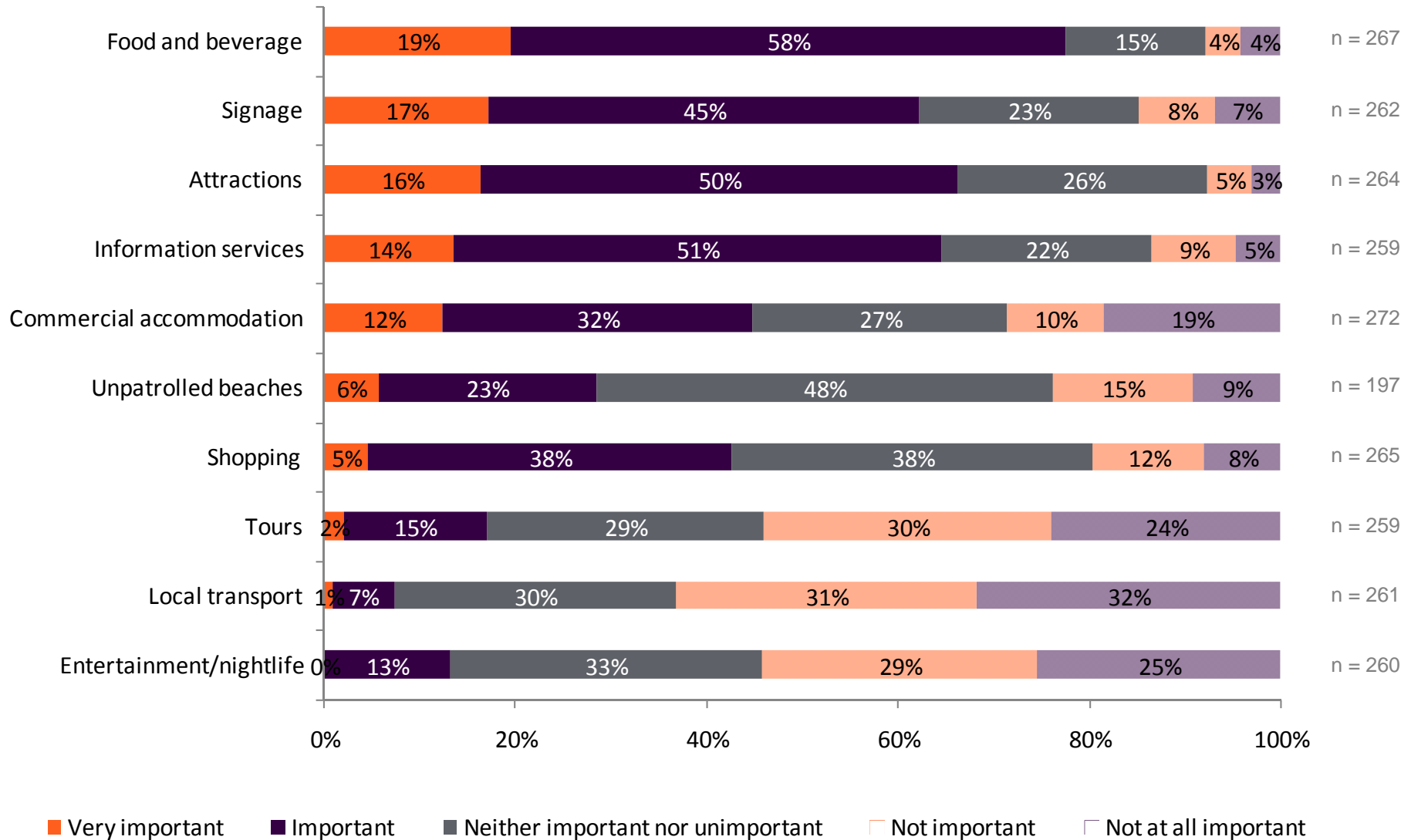
Which, if any, of the experiences listed below did you expect the Sapphire Coast to offer?  
If you answer YES, please indicate how well the region met this expectation."

# Friendly service and personal safety were most important to visitors



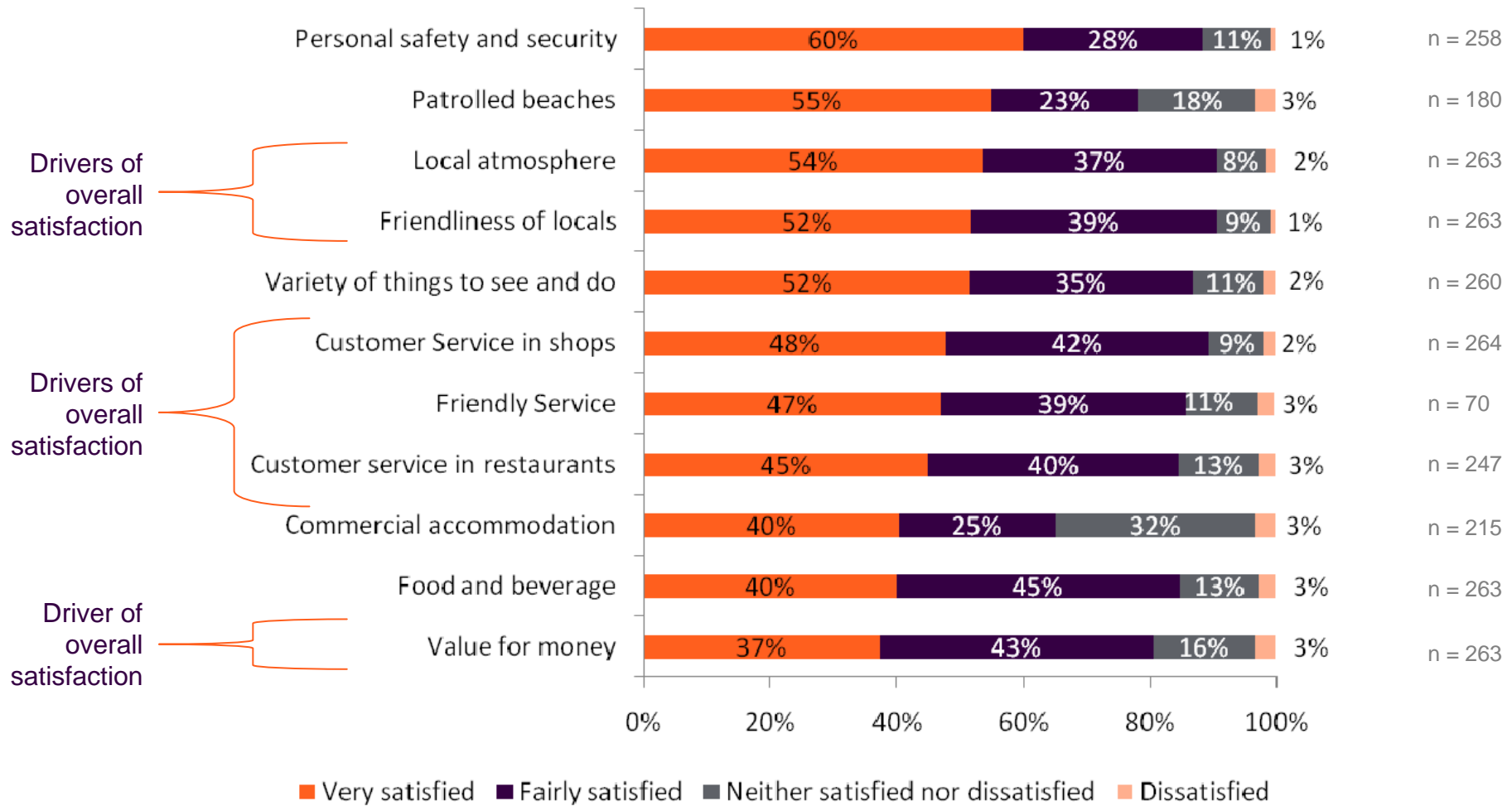
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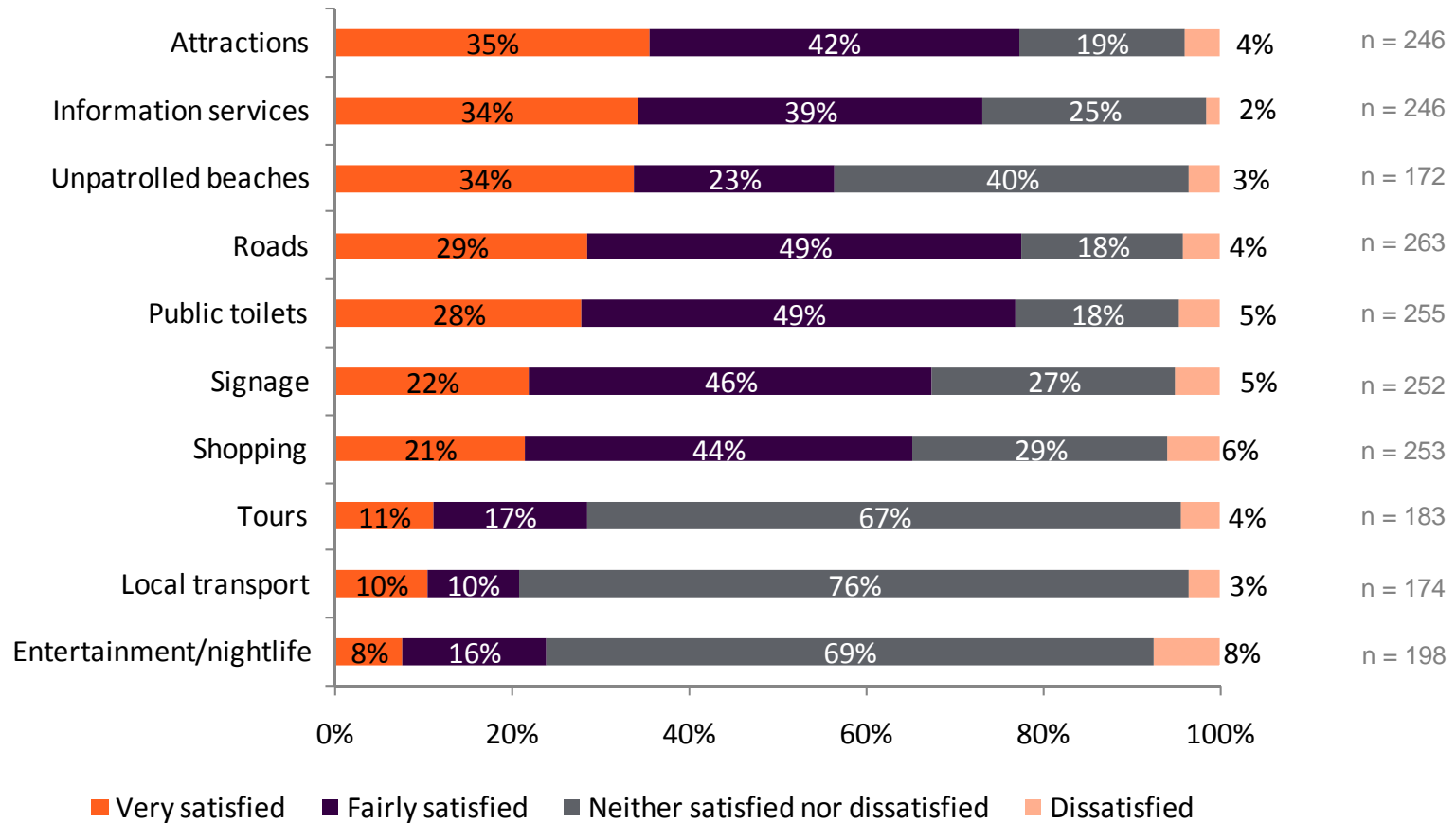
*"Again, thinking about your most recent trip to the Sapphire Coast, how important or unimportant was ..."*

# Satisfaction with personal safety was above the benchmark



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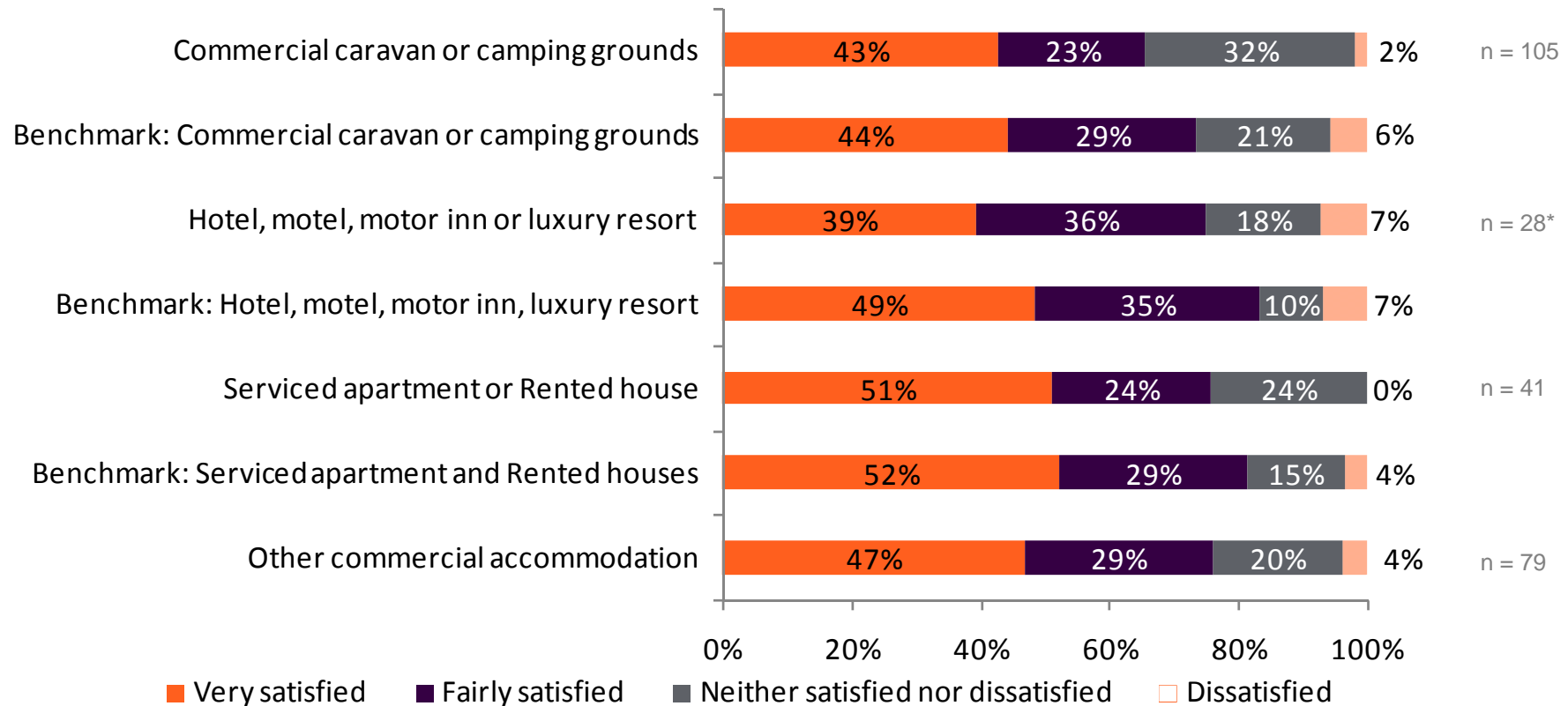
“And how satisfied or dissatisfied were you with....”



*“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

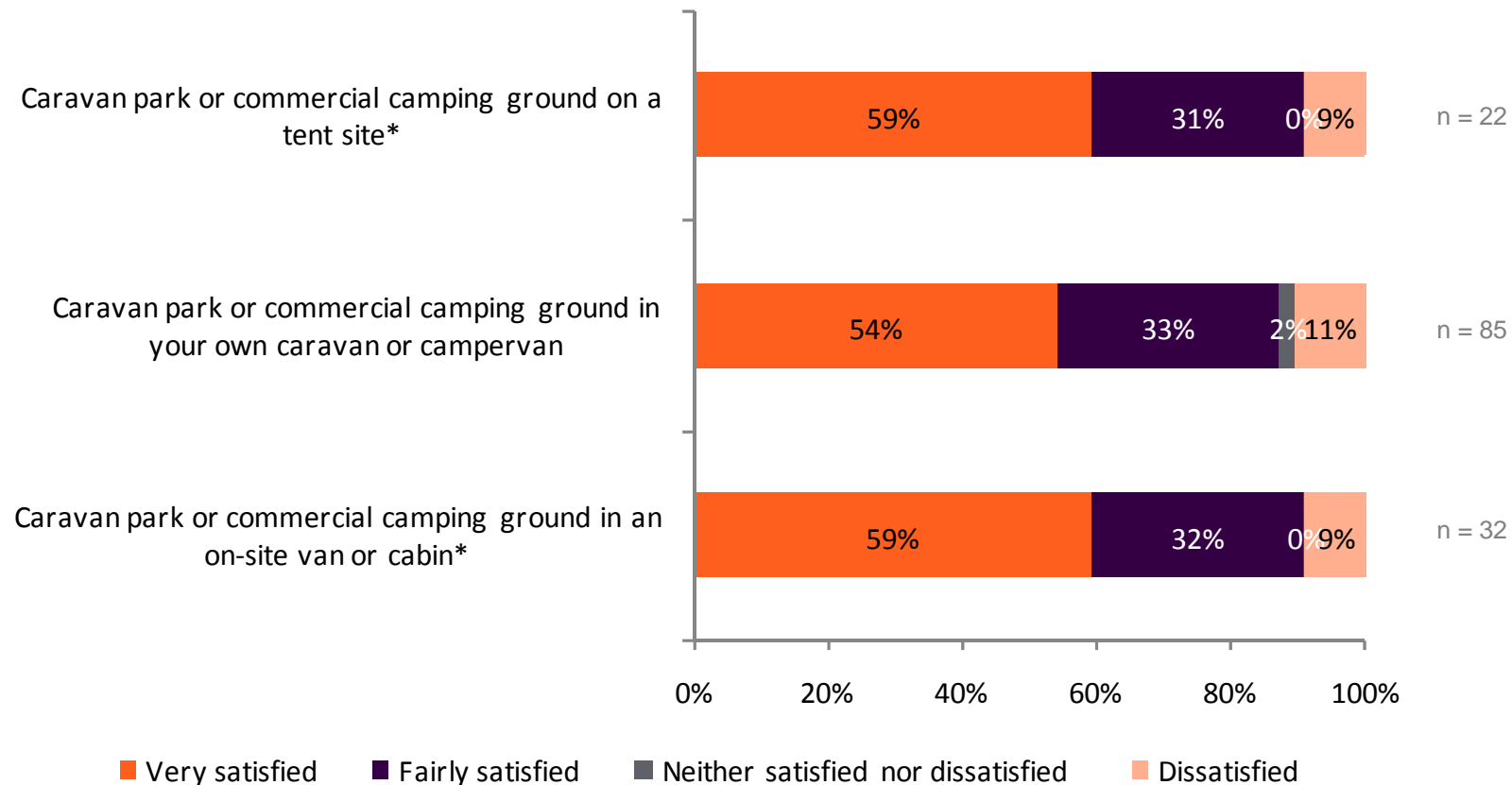


\* Small Base

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

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

# Visitors who stayed in their own van were slightly less satisfied than those who stayed in their own tent or on-site van



\* Small Base

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

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

# Visitors were happy with the beaches and scenery

- 'Pristine beaches that remain unmarked by development.' (35-44 years, first time visitor)
- 'Beautiful unspoilt destination that oozes natural beauty and a local friendly atmosphere.' (34-45 years, repeat 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)
- 'We were very impressed with the beaches and national parks. The information provided about the national parks was excellent' (45-54 years, repeat visitor)

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

# Visitors were happy with the cleanliness of the area

- 'How clean & clear the water at the beaches were' (45-54 years, repeat visitor)
- 'Cleanliness. Still the feeling of natural environment. Pristine beaches and waterways.' (65 years or more 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)
- '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)

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

# Visitors were happy with the commercial caravan parks

- 'I love the Discovery Holiday Park, Pambula Beach. 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)
- 'Big 4 Caravan Park Pambula Beach a pleasure to visit we have been visitors for forty years. The road to Bermagui via Tathra very interesting have visited Cobargo other years also interesting.' (65 years or more, repeat visitor)
- 'We loved the caravan park where we stayed, Merimbula Beach' (35-44 years, repeat visitor)
- '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)

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

# Visitors were unhappy with the roads and signage

- 'Bad road signage, princes highway needs work in many spots' (35-44 years, repeat visitor)
- 'Roads across the mountains - weather closed in both to and from our trip.' (65 years or more, repeat visitor)
- 'The road conditions were poor' (45-54 years, first time visitor)
- '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)
- 'Some areas such as Wolumla have no toilet rest area facilities, litter is also an issue in the area roadside litter very unimpressive.' (55-64 years, repeat visitor)

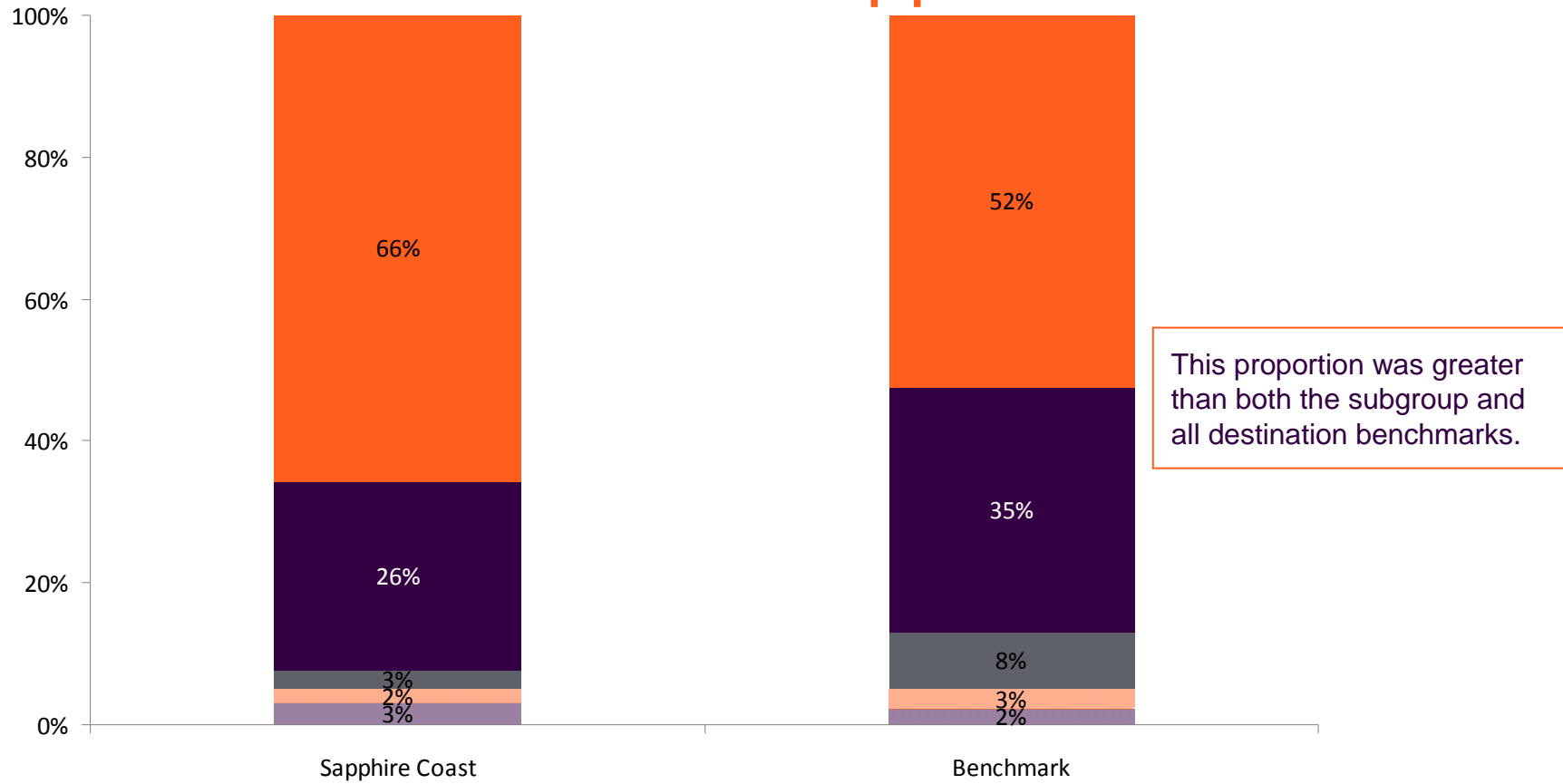
*"What else about the Sapphire Coast were you particularly unhappy with on your recent visit?"*

# Visitors were unhappy with expensive prices

- '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 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)
- '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)

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

# Nearly seven in ten visitors were very likely to recommend the Sapphire Coast



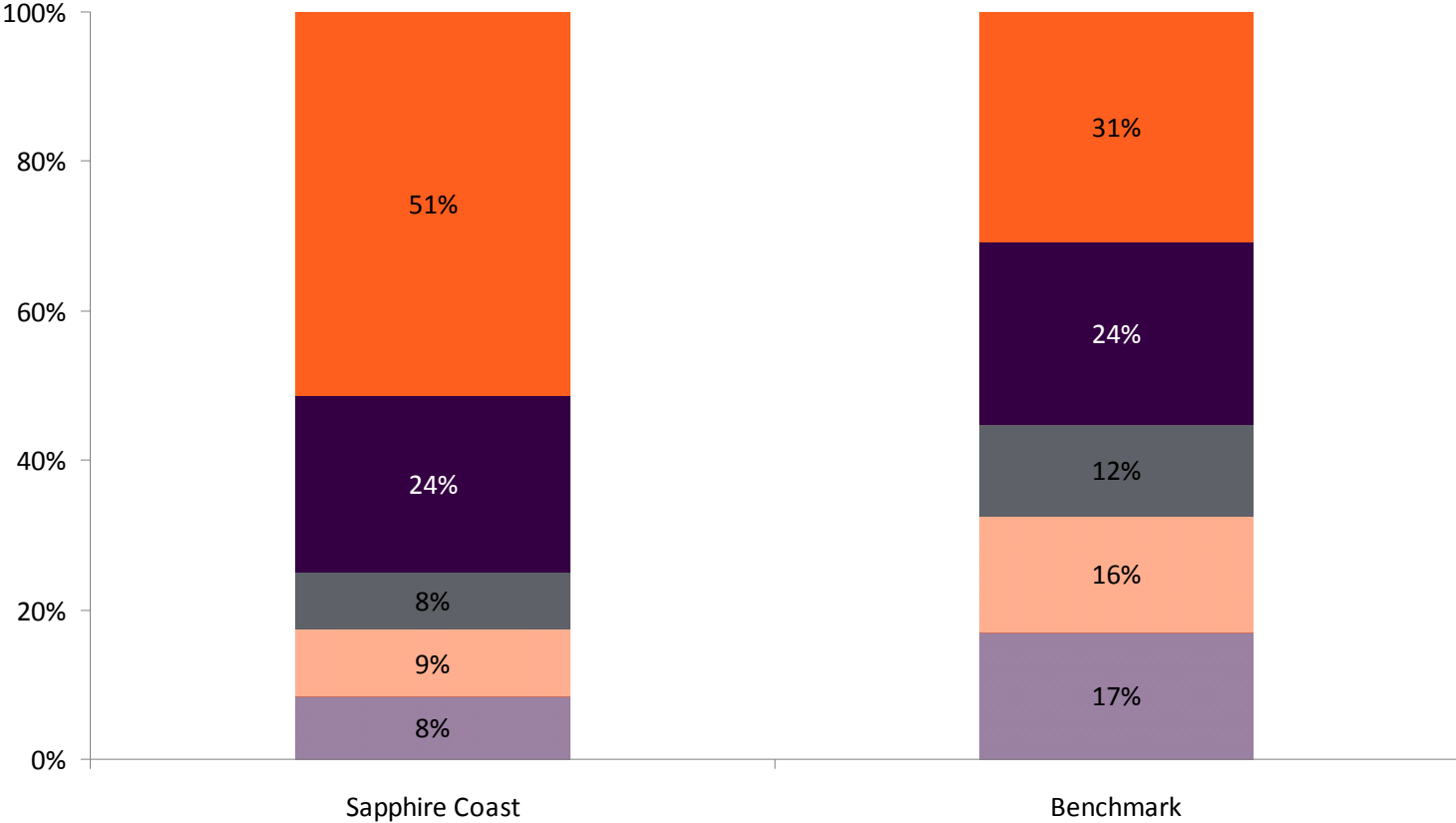
□ Very unlikely   
 □ Fairly unlikely   
 ■ Neither likely nor unlikely   
 ■ Fairly likely   
 ■ Very likely

Key Metrics	Total Sat	V Sat	Total Dis
<b>Recommend</b>	<b>92%</b>	<b>66%</b>	<b>5%</b>
Difference to subgroup	3%	14%	1%
Difference to all	5%	13%	0%

Base = 272

*"How likely are you to recommend the Sapphire Coast to other people as a destination to visit?"*

# Visitors were more likely to return in the next 12 months compared with the benchmarks



Very unlikely    Fairly unlikely    Neither likely nor unlikely    Fairly likely    Very likely

Likelihood to Return	Total Likely	V Likely	V Unlikely
<b>... in 12 months</b>	<b>75%</b>	<b>51%</b>	<b>8%</b>
Difference to subgroup	↑ 8%	↑ 11%	→ -1%
Difference to all	↑ 20%	↑ 21%	↓ -8%

Base = 272

“How likely are you to return to the Sapphire Coast in the next 12 months?”

# Summary

- Over half of visitors (56%) were very satisfied with their visit to the Sapphire Coast. This was greater than both the subgroup and all destination benchmarks.
- The proportion of visitors very satisfied with their visit to the Sapphire Coast differed by different visitor segments.
- Immediate families travelling together (64%), visitors with families (but not necessarily travelling with them) (61%), those who stayed in a tent site at a commercial caravan park or camping ground (59%), those who stayed in an onsite van or cabin at a commercial caravan park or camping ground (59%), those who stayed in a hotel, motel, motor inn, serviced apartment or rented house/unit (59%), those who stopped at more than one town (56%) and repeat visitors (57%) were more satisfied than other visitors.
- In contrast young/midlife singles/couples (40%) and older singles and couples (47%) were less satisfied than other visitors.
- Something the kids would enjoy was an experience that was expected (68% expected this experience) and visitors rated it as better than expected (55% rated it as better than expected) compared with the benchmark.
- Relaxation and rejuvenation, spend quality time with partner/family/friends and nature based experiences were all experiences that were expected by visitors, however when compared to the benchmark visitors did not rate them as better than expected.

# Summary

- Personal safety and security and friendly service were attributes most important to visitors with 41% of visitors rating each attribute as very important.
- Local atmosphere, friendliness of locals, customer service in restaurants, customer service in shops and value for money were the main drivers of overall satisfaction.
- 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.
- In terms of commercial accommodation, visitors were less satisfied with hotel, motel, motor inn or luxury resort accommodation (39% very satisfied) compared with the benchmark (49% very satisfied).
- Other attributes that scored below the VPS benchmarks included food and beverage, roads, signage, local transport, entertainment, shopping, public toilets, information services, attractions and tours.
- Nearly seven in ten visitors were very likely to recommend the Sapphire Coast, much higher than the VPS benchmark (52%).

# Australia's Coastal Wilderness and the Sapphire Coast

Overall awareness

Sources of information

Level of appeal for attractions

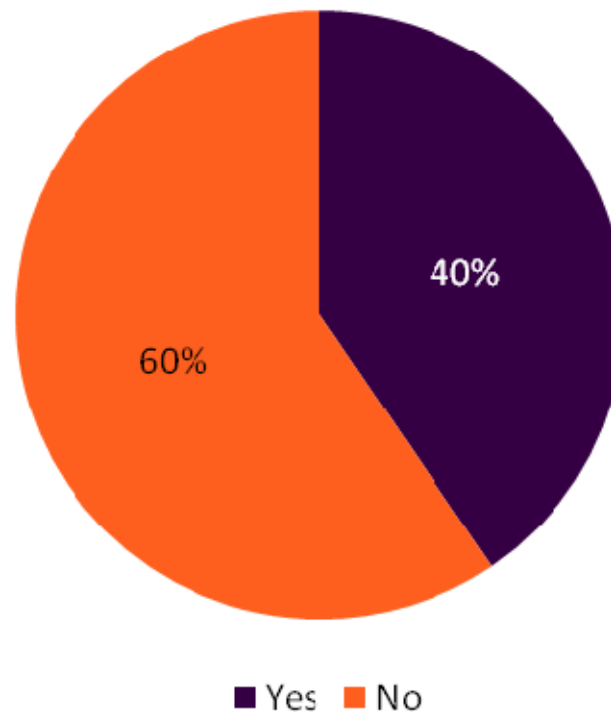


Australian Government  
Department of Resources, Energy and Tourism  
Tourism Research Australia

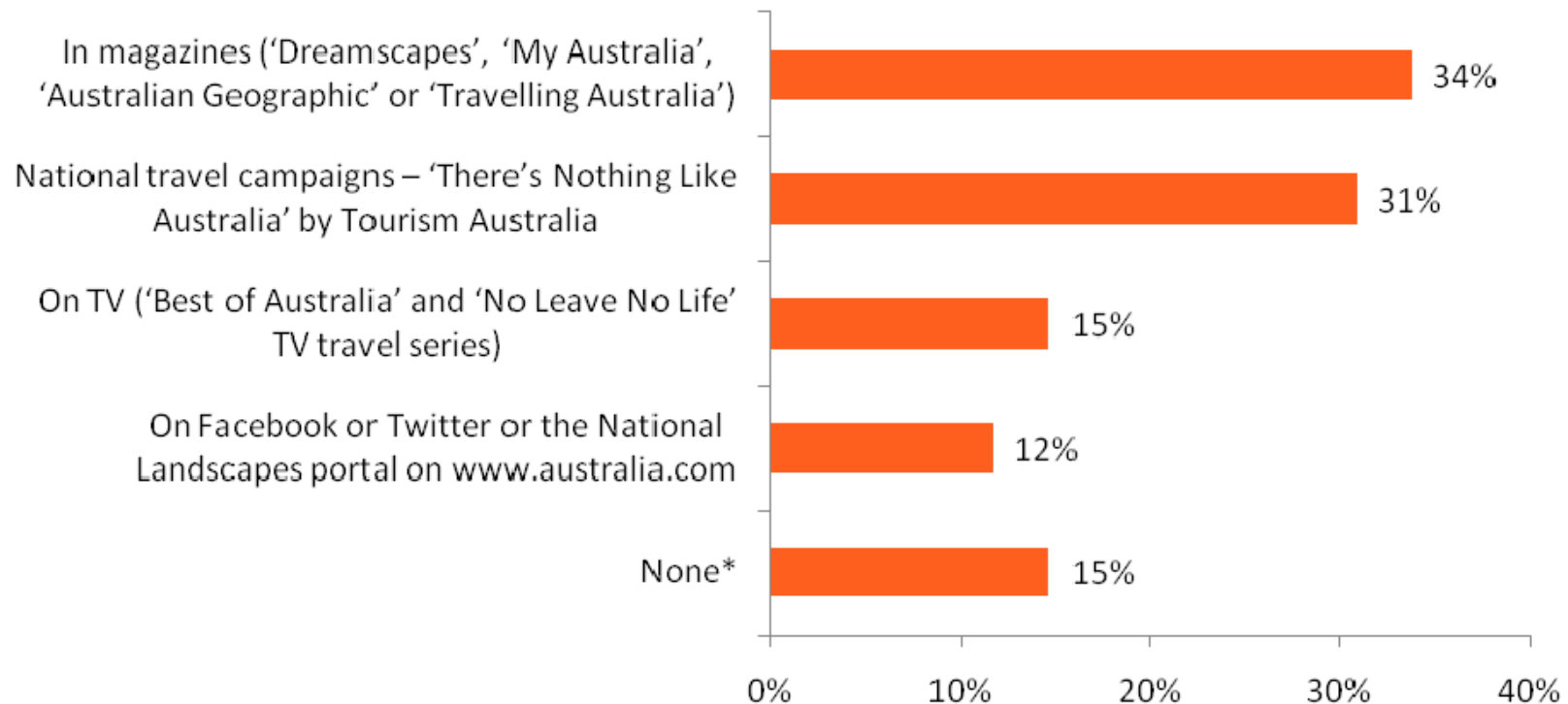


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AUSTRALIA

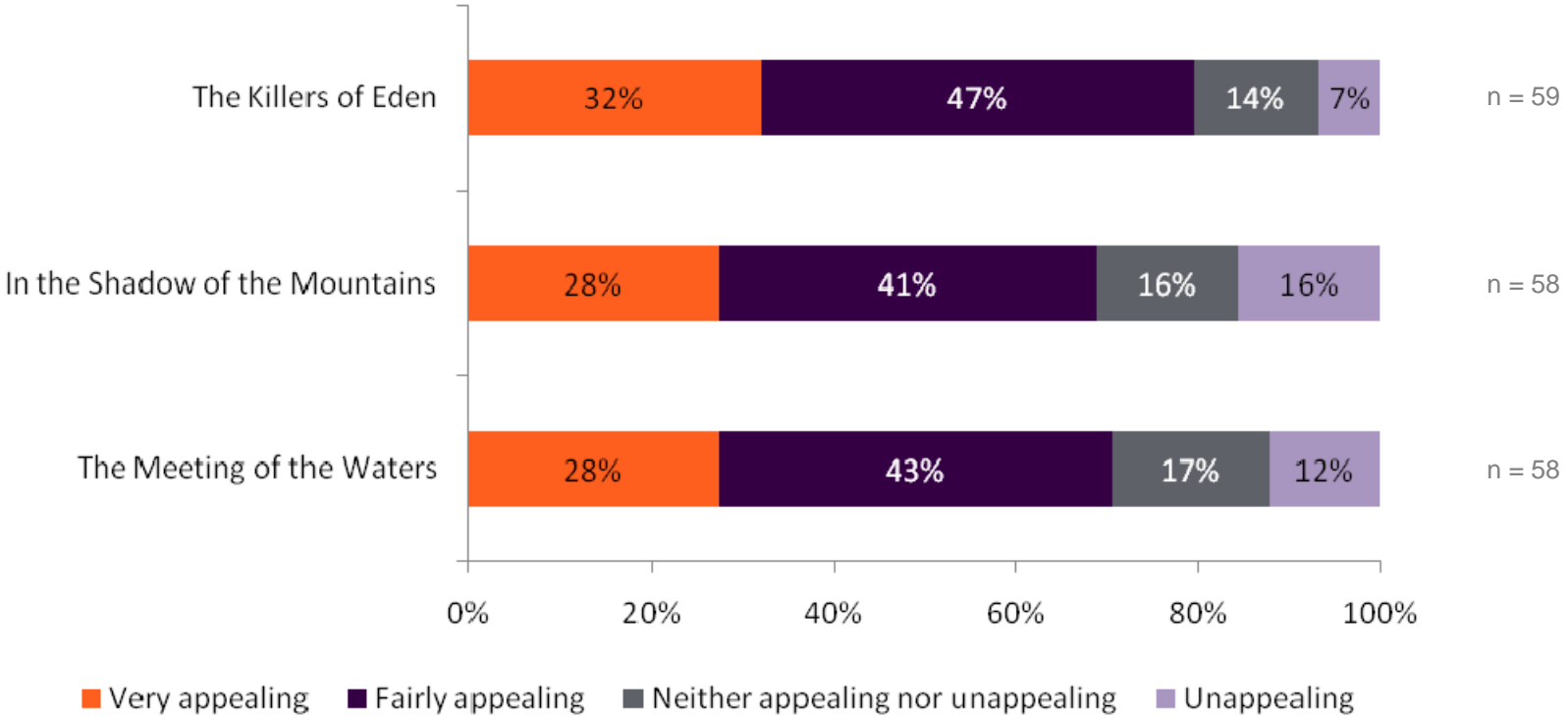
# The majority of visitors did not know the Sapphire Coast is part of Australia's Coastal Wilderness



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



# 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.*

# Appendix



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



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# Benchmark summary

- **Objective:** To allow destinations to compare the results from the Visitor Profile and Satisfaction (VPS) survey with results from other destinations
- **Sample size:** Relevant sample sizes appear in the first column on the first page
- **Significance testing:** No significance testing has been done on the figures
- **Categories:** Only standard categories are included – individual destinations may have included non-standard categories in their questionnaire that are not included in the summaries
- **Subgroup destinations:** The list of subgroup destinations appear on the first page of the summary. In most cases these were nominated by the destination or STO
- **Layout:**
  - **First page** - contains information that can be used to profile visitors to a region and to identify information and booking sources
  - **Second page** – contains information on visitor expectations and satisfaction including their likelihood to return

# Benchmark summary

Three sets of results are included in each summary:

1. Average results for the destination
2. The difference between the average results for the destination and a nominated subgroup of destinations
3. The difference between the average results for the destination and all destinations


Key Metrics	Total Sat	V Sat
<b>Overall Satisfaction</b>	<b>92%</b>	<b>58%</b>
Difference to subgroup	↑ 4%	→ 0%
Difference to all	↑ 5%	→ 3%

Destination results

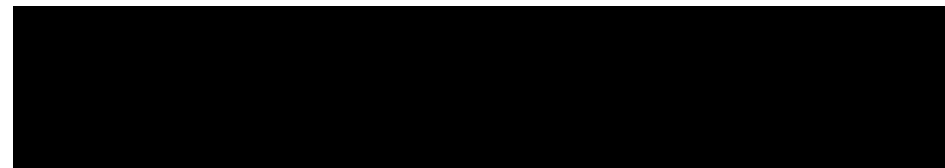
# Benchmark summary

## Dashboard symbols

 If a destination is more than 3 points above the subgroup or total

 If a destination is within +/- 3 points of the subgroup or total

 If a destination is less than 3 points below the subgroup or total

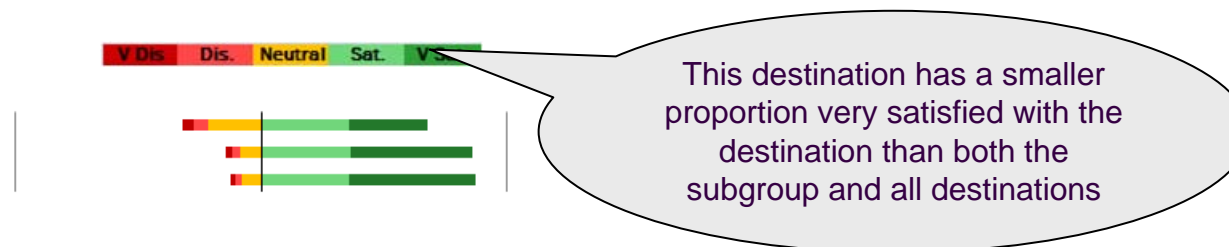


34% of respondents  
travelled to the  
region to visit  
friends and relatives

That is 16  
percentage points  
more than the  
subgroup

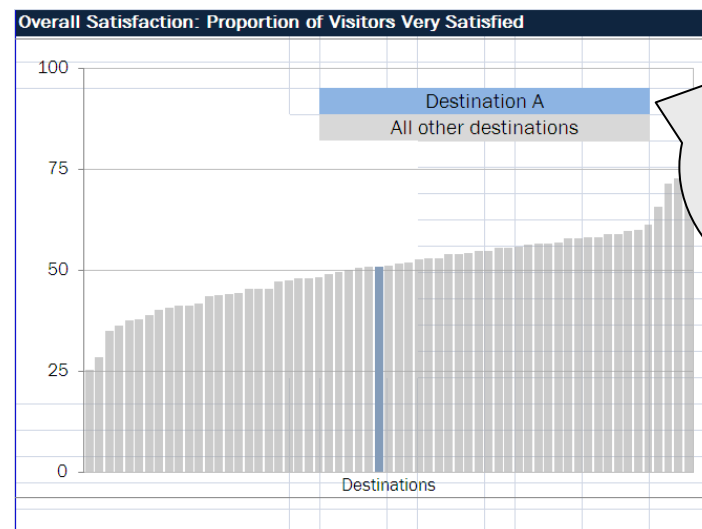
# Benchmark summary

- Bar charts: The small horizontal bar charts on the second page show the full results (that is all points on the scale) for the respective categories
  - All data displayed are for a 5 point scale
  - The upper 2 categories on the scale are recorded as positive values and appear on the right side of the vertical axis. These correspond to total satisfaction.
  - The lower 3 categories on the scale are recorded as negative values and appear on the left side of the vertical axis



# Benchmark summary

The large vertical bar chart on the second page shows the proportion of respondents in each destination that were 'Very satisfied' overall with their visit.



In terms of overall satisfaction, Destination A is close to average in terms of the total number of respondents who were very satisfied with their visit.

# Attraction concepts

The Sapphire Coast is considering three new attractions that will showcase and highlight the region's heritage and culture. Three iconic stories were selected - "The Killers of Eden", "The Meeting of the Waters" and "In the Shadows of the Mountains".

## **1. The Killers of Eden**

This story is about the history and heritage of whaling in Eden and how man (Aboriginal and European) interacted and worked together with the Killer Whales. Visit Davidson Whaling Station and see a real life whale skeleton in the Eden Killer Whale Museum.

## **2. The Meeting of the Waters**

The coastline around Eden is the melting pot where the warm East Australian Current from the north converges with the cold southern waters of Bass Strait, causing a colossal eruption of marine bio-diversity. This is why fishing and whale watching are so plentiful and the Sapphire Coast Marine Discovery Centre is established.

## **3. In the Shadow of the Mountains**

Three mountains exist in the Sapphire Coast (Mt Imlay, Mt Dromedary and Mumbulla Mt). Learn about the geological heritage of the region including how Mt Dromedary was an active volcano and its erosion whittled away not just soil but gold - creating the Montreal Goldfields, Australia's only seaside goldfield that started in the town of Bermagui.