



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

Introduction

The Coffs 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 Coffs Coast Marketing, Bellingen Shire Council and Tourism NSW to gain a better understanding of visitors to the region and improve the market readiness of the industry in the Coffs Coast region. Additionally, this research provides more reliable and detailed information on the Coffs Coast region, to feed directly into industry development decisions and investment initiatives. More specific objectives of the research included: understanding issues such as quality of tourism product and experiences; motivations; visitor expectations; and travel planning habits.

Method

Since 2006, 70 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 Coffs Coast VPS project was completed during January and February 2011, which coincided with the school holiday period. Consequently, there was a high proportion of family travel parties in the survey sample, which should be taken into account when considering the results and in subsequent discussions and planning.

Part of the survey period was also during the period of the Queensland/Brisbane floods in 2011, when weather conditions were quite poor. The effect of this should also be taken into account when considering the results, as the poor weather may have influenced the satisfaction results.

Visitor and trip characteristics

The key characteristics of the survey sample were as follows:

- The majority of visitors (53%) to the Coffs Coast region were in the family lifestage and 45% of all visitors were travelling with their immediate family.
- The majority of visitors visited the region for holiday/leisure purposes (71%). Most of these visitors were travelling with their immediate family (52%).



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- Around a fifth (21%) travelled to the region to visit friends and/or relatives (VFR); a higher proportion compared with the VPS benchmarks. These visitors were either travelling with their immediate family (32%) or with their partner (32%).
- The majority of visitors (93%) were travelling domestically.
- Nearly six in ten domestic visitors (57%) were from NSW, with 52% of NSW visitors from areas north of Sydney.
- There was a high proportion of repeat visitors (84%). Nine out of ten family travel parties (91%) were repeat visitors.
- More than two in five visitors (41%) stayed in the Coffs Coast for eight or more nights compared to the VPS benchmark of 12%.
- First-time visitors were less likely to travel with their immediate family; stayed for a shorter time; and were more likely to be in the Coffs Coast region because it was a convenient stopover.
- More than three in five visitors (61%) planned their trip more than three months in advance. This was driven by repeat visitors (65% of whom decided to visit more than three months in advance), and those travelling with their immediate family (68%).
- Previous experience and the internet were the main sources of information and booking.
- Accommodation operator sites were the most popular sites for both information and booking for all types of visitors. They were also considered the most useful.
- Just under a third of visitors (31%) stayed in a *caravan park or commercial camping* accommodation. This compares to 23% for the VPS benchmark.

Motivations for visiting the Coffs Coast

The single most important reason for visiting the Coffs Coast was it was considered *a great place for a family holiday* with over a quarter of visitors (27%) giving this as the single, or most important, main reason for visiting. *To visit family* was the next most important reason at 17%, followed by *to visit friends and convenient stopover*; each with 9%.

Regardless of the reason for choosing to visit Coffs Coast, the experiences most expected when in the region were *relaxation and rejuvenation* (91%) and *spending quality time with partner/family/friends* (86%), both scoring above the VPS benchmarks (13 points and 11 points above the VPS benchmark respectively).

Other experiences that scored above the VPS benchmarks in terms of expectations were:

- *Something the kids would enjoy* (54%, 23 points above)
- *Good shopping* (51%, 11 points above)
- *Food and wine* (51%, 4 points above)
- *Luxury and indulgence* (35%, 9 points above).

In terms of *luxury and indulgence*, it was mainly an expectation of holiday/leisure visitors (excluding VFR), indicating that *luxury and indulgence* is as important for some families as *something the kids would enjoy* when choosing a holiday in the Coffs Coast region.

There were some experiences that scored well below the VPS benchmarks, such as:

- *To tour around and explore* (67%, 13 points below)
- *To discover or learn something new* (43%, 17 points below)
- *An adventure* (36%, 13 points below)
- *To experience arts or culture* (25%, 13 points below), and
- *To experience our nation's history* (19%, 33 points below).

While most of these experiences would generally be expected by non-family visitors, *to discover or learn something new* is an experience that can work well with a family-based market. The ACT is an example that can be compared to the Coffs Coast, where the 2010 VPS study in the ACT indicated that 77% of visitors in the family market expected *to discover or learn something new* while in the ACT.

Overall satisfaction with the Coffs Coast

The figure below shows where the Coffs Coast ranks in overall satisfaction compared to all other participating VPS destinations. About 48% of visitors were very satisfied with the Coffs Coast, which is slightly below the VPS benchmark of 51%.



Respondents to the Coffs Coast survey were recruited during the period of the Queensland/Brisbane floods in 2011 and the weather conditions were quite poor for part of the survey period. It is difficult to assess quantitatively, but this is likely to have had some effect on the satisfaction results, particularly for families where outdoor activities for children play a primary role in the holiday. A number of visitors stated in open ended responses that the poor weather had an impact on their satisfaction.

Based on experience from the VPS program, TRA's research team concluded that the Coffs Coast satisfaction scores were impacted negatively by the poor weather. However, there was also clear evidence that there were issues in relation to the visitor experience requiring consideration of the local industry.

Drivers of satisfaction with the Coffs Coast

The top five drivers for the overall satisfaction with the Coffs Coast were:

- *Variety of things to see and do*
- *Friendly service*
- *Local atmosphere*
- *Personal safety and security*
- *Value for money*

With the exception of *local atmosphere*, all attributes were below the VPS benchmark in terms of the proportion of visitors who were very satisfied.

The following table lists all of the attributes that scored below VPS benchmarks:

Attribute	Proportion of visitors who were very satisfied	
	Coffs Coast	VPS Benchmark
Personal safety and security	53%	56%
Friendly service	52%	55%
Friendliness of the locals	50%	55%
Attractions	42%	49%
Variety of things to see and do	41%	50%
Food and beverage	39%	44%
Commercial accommodation	34%	39%
Value for money	29%	36%
Information services in the region	26%	48%
Signage	24%	36%
Roads	23%	40%
Public toilets	19%	38%
Tours	12%	27%
Local transport	9%	16%

Further analysis of commercial accommodation provided some interesting results. This group exhibited much lower overall satisfaction scores (satisfaction with their entire trip, not just accommodation). One group with much lower satisfaction levels were visitors who stayed in hotel/motel accommodation (including luxury hotel accommodation). The overall satisfaction score for this group was 36% very satisfied with their visit to the region, 12 points below the score for all visitors to the region.

This group also recorded low satisfaction levels with their accommodation; only 33% were very satisfied which is 16 points below the VPS benchmark. Given that *luxury and indulgence* was an expectation of over a third of visitors to the region, these accommodation scores should be higher.

A considerable proportion of Coffs Coast visitors stayed in a *caravan park or commercial camping ground* (31%). These visitors were more likely to be very satisfied with their overall visit to Coffs Coast (57% compared to 48% overall). Across all the VPS projects, the overall satisfaction benchmark for people staying in a *caravan park or commercial camping ground* is 50%, indicating that this is a very positive result for Coffs Coast caravan parks.

The open ended comments highlighted various themes of visitor satisfaction with the region:

- Sawtell and Bellingen were consistently mentioned as highlights
- The Pet Porpoise Pool was mentioned as an attraction providing an excellent experience
- Responses were positive around the beautiful beaches and scenery
- Visitors were also happy with the caravan park accommodation.

Value for money was an attribute that received comments in the open ended forums. Dissatisfaction was expressed concerning perceived Christmas holiday price increases, cost of attractions (with the notable exclusion of the Pet Porpoise Pool), and the value of accommodation (price for run-down properties).

The open ended responses indicated that the issues with roads were not just in relation to the Pacific Highway. Other comments included the lack of footpaths in some areas and negative comments about the busy highway running through part of Coffs Harbour.

The low score for information services in the region was barely mentioned in the open ended comments. However, the low scores should be addressed given the contribution that information services can make to visitor dispersal and expenditure in a region.

Satisfaction with the Coffs Coast amongst different groups

An interesting sub-group in terms of satisfaction were those visitors who had visited Bellingen and/or Dorrigo during their stay in Coffs Coast (the majority of whom had visited Bellingen as a day trip and were staying elsewhere in Coffs Coast).

This group recorded a higher overall satisfaction score (55% very satisfied) than those who had not visited Bellingen/Dorrigo (42%). Visitors who stayed in, or went to, Bellingen and/or Dorrigo during their stay, scored higher on *food and beverage* and *the local atmosphere* of the region than visitors to the region in general, including those who just visited Coffs Harbour.

It would seem that a significant strength of the tourism offering in the Coffs Coast is the variety afforded by the different centres such as Bellingen, Sawtell, Dorrigo, Urunga and Coffs Harbour. Each of these localities has particular strengths encompassing a variety of important experiences: atmosphere, natural beauty, food and wine, shopping, attractions and pristine beaches.

Geographically, they are also relatively close together, which is not always the case for hinterland areas of regional tourism destinations. Visitors who disperse to other places in the region had higher satisfaction levels, which indicate that the region is much stronger as a whole than as individual localities.

The survey results showed that at the time of the year when the study was held, the Coffs Coast attracted mostly family travel parties who stayed for a considerable length of time. The majority of these families had been to the Coffs Coast before, and many could be regarded as regular visitors. Expectations of visitors centred around *relaxation and rejuvenation*, *shopping* and *something the kids would enjoy*. Despite the relatively high score for meeting expectations around *something the kids would enjoy*, the overall satisfaction score for family travel parties was relatively low at just 44% very satisfied compared to the VPS benchmark for families of 50%. This result was surprising given the importance of this market to Coffs Coast.

Recommendations

The following recommendations are for further consideration by the local industry:

1. Stimulating consumer demand:

- The key strength of the Coffs Coast is the variety afforded by the different localities within the region, which should be a key consideration in marketing the region.
- Consider the strength of offerings in Sawtell and Bellingen, particularly in terms of *food and wine*, *shopping* and *local atmosphere*.

2. Product and service delivery:

- Encouraging visitors to disperse while in the region is very important, and information services are the perfect vehicle for achieving this.
- Consider a strategy to encourage the large population of repeat visitors to make use of information services.

3. Product development and diversification:

- The experience to *discover or learn something new* should be paramount when developing new attractions or revamping existing new ones, particularly during the peak family visitation periods.
- The Pet Porpoise Pool is an example of an attraction that is delivering experiences via attractions.

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Image: Urunga Boardwalk, Bellinger River, Urunga NSW
Courtesy of Coffs Coast Marketing

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