



Forster-Tuncurry Visitor Profile and Satisfaction Report: Summary and Discussion of Results

Introduction

The Forster-Tuncurry 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.

This project was undertaken by TRA — in partnership with Great Lakes Tourism and Destination New South Wales — to gain a better understanding of visitors to the region, including their motivations for visiting and satisfaction with their visit to the Forster-Tuncurry region. This includes providing more reliable and detailed information on the region, to assist with destination management including planning, development and marketing.

Method

The Forster-Tuncurry VPS project was conducted during April and May 2011. The results are a snapshot of a specific time of the year, and this needs to be taken into account when considering the results. The effect of conducting the survey during the 2011 Easter/ANZAC day long weekend is also clear in the results, with a high proportion of family travel parties in the survey sample. These factors should also be taken into account in subsequent discussions and planning.

Since 2006, 73 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 following summary includes a discussion on the results for the Forster-Tuncurry region.

Visitor and trip characteristics

The key characteristics of the survey sample for Forster-Tuncurry were as follows:

- The majority of visitors were in the family life stage (56%), with 45% travelling with their immediate family. Nearly a third of visitors (31%) travelled to the region with their partner.
- The majority of visitors (78%) travelled to the region for holiday/leisure purposes, a similar proportion to the benchmark. A fifth (20%) travelled to visit friends and relatives (VFR), seven points above the VPS benchmark.
- More than nine in ten visitors (98%) to the Forster-Tuncurry region were domestic visitors, with 94% of domestic visitors from New South Wales, mainly Sydney.



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- Nearly nine in ten visitors (86%) to the Forster-Tuncurry region were repeat visitors, 17 points above the VPS benchmark.
- More than half of visitors (51%) to the Forster-Tuncurry region used the internet for information on the region and 35% used it to make bookings. Accommodation operator sites were the most common sites used for both information and booking and were considered the most useful by 29% of visitors.
- The majority of overnight visitors (96%) to the Forster-Tuncurry region stayed more than one night, with the median stay being five nights. Around three quarters (76%) of overnight visitors stayed at least four nights in the region.
- The majority of overnight visitors (96%) only stayed overnight in one town in the region.
- The most common towns stopped at (including day visits) were Forster (93%), Tuncurry (80%), Pacific Palms (21%), Bulahdelah (19%), Elizabeth Beach (15%) and Nabiac (14%).
- The majority of visitors to most towns were day visitors. The exception was Forster with 56% of visitors to Forster staying overnight.
- Over a quarter of visitors to the Forster-Tuncurry region (27%) stayed in commercial caravan or camping grounds, 23% with friends and/or relatives and 20% in a rented house, apartment, unit or holiday flat.

Motivations for visiting the Forster-Tuncurry region

Motivations for visiting the Forster-Tuncurry region revolved around family and friends and the variety of things to see and do. Nearly half of visitors (47%) chose the region because it was *a great place for a family holiday*, 27% because of the *variety of things to see and do*, 23% *to visit family there* and 21% because *it is a great place to spend time with my partner*.

These motivations followed through to the experiences expected by visitors to the Forster-Tuncurry region. Experiences that scored above the VPS benchmarks in terms of expectations of the region in general were:

- *Something the kids would enjoy* (66%, 35 points above)
- *Relaxation and rejuvenation* (92%, 16 points above)
- *A place to spend quality time with my partner, family and/or friends* (89%, 18 points above)
- *Good shopping* (52%, 16 points above)
- *Nature-based experiences* (68%, 12 points above)
- *Luxury and indulgence* (32%, 7 points above)
- *Enjoyable nightlife and entertainment* (30%, 10 points above)

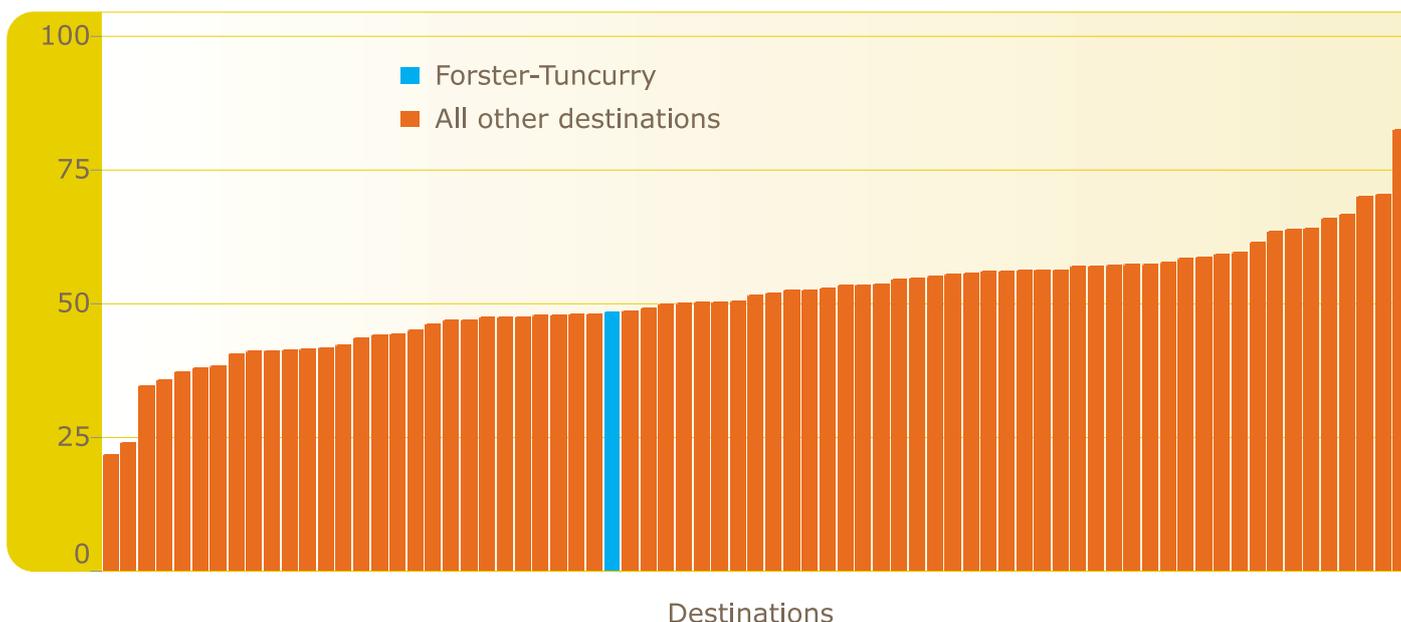
Not surprisingly, the motivations and expectations of the Forster-Tuncurry region were reflected in the activities visitors participated in while in the region. Compared with the VPS benchmarks, visitors were more likely to participate in:

- *general sightseeing* (82%, 9 points above)
- *shopping* (78%, 22 points above)
- *going to the beach* (76%, 17 points above)
- *eating out* (74%, 6 points above)
- *going to the markets* (53%, 25 points above)
- *fishing* (34%, 26 points above)
- *visit friends and relatives* (34%, 12 points above)
- *picnics and BBQs* (32%, 10 points above)
- *water activities/sports* (20%, 15 point above)

However, although visitors expected to participate in nature based experiences, they were less likely to participate in activities such as *visiting National or State Parks* (16%, 17 points below), *visiting botanical or other public gardens* (7%, 11 points below) and *bushwalking or rainforest walks* (20%, 9 points below). This suggests that for visitors to the Forster-Tuncurry region, water-based and beach activities fulfil the expectation for nature-based experiences more so than parks and gardens.

Satisfaction with the Forster-Tuncurry region

The figure below shows where the Forster-Tuncurry region ranks in satisfaction compared to all other participating VPS destinations. About 49% of visitors to the Forster-Tuncurry region were very satisfied with their visit, three percentage points below the VPS benchmark of 51%.



Although the *overall visitor satisfaction* score for the Forster-Tuncurry region is below the VPS benchmark, this should be viewed as an opportunity for improvement. The region has a very high proportion of repeat visitors whose expectations are generally more difficult to exceed. Couple this with above average levels of visitors who were very likely to both return in the next 12 months (54%, 22 points above the VPS benchmark) and recommend the region to others (58%, 6 points above) and there is certainly strong growth available to boost overall satisfaction in the region.

Visitor satisfaction with all attributes in the region was either below or similar to the VPS benchmarks. There were a number of key drivers that resulted in the overall satisfaction score for the Forster-Tuncurry region. These included:

- *Commercial accommodation* (55% NET¹ satisfied; 26% very satisfied; 13 points below the benchmark)
- *Attractions* (69% NET satisfied; 31% very satisfied; 18 points below the benchmark)
- *Entertainment/nightlife* (38% NET satisfied; 10% very satisfied; 6 points below the benchmark)

Furthermore, both the scores and open ended comments pointed to a number of attributes visitors were less happy with including roads (15% very satisfied; 24 points below the benchmark), *public toilets* (19% very satisfied; 18 points below the benchmark), *customer service* (35% very satisfied; 17 points below the benchmark), *friendliness of locals* (47% very satisfied; 8 points below the benchmark) and *personal safety and security* (51% very satisfied; 6 points below the benchmark).

Visitors to the Forster-Tuncurry region place a high level of importance on *personal safety and security* (52% very important), *value for money* (33%), *public toilets* (32%), *roads* (32%), *friendliness of locals* (29%) and *customer service* (28%). Based on the number of open ended comments around these important attributes, it is not surprising that visitor satisfaction with these attributes was low.

The open ended comments highlighted five main themes of visitor dissatisfaction around the trip attributes.

- The condition of the roads and traffic congestion, particularly congestion through Bulahdelah and the Forster-Tuncurry bridge.
- The lack of public facilities, especially parking, pedestrian access and public toilets.

¹ Results for both 'Very satisfied' and 'Fairly satisfied' visitors

- Value for money, particularly the cost of attractions and accommodation prices over the long weekend.
- Shopping hours and the variety of restaurants and cafes, particularly the amount of shops and restaurants that either closed early or were closed over the long weekend.
- Friendliness of locals, customer service and personal safety, particularly the attitude of locals towards visitors, rudeness of staff at some accommodation providers and restaurants, traffic noise and the presence of fighting and intoxicated people in the streets.

As the project was completed over the 2011 Easter/ANZAC Day long weekend, low visitor satisfaction with commercial accommodation and value for money could be related to some visitors perceiving the cost of accommodation as high compared to when they stayed in the region previously. Shops and restaurants being closed over the period may also have resulted in the low satisfaction scores with food and beverages and the variety of things to see and do.

On the upside, visitors were most happy with:

- *The beautiful scenery, beaches and natural wildlife*
- *The local markets*
- *The family friendly atmosphere and things for kids to do*

Overall, visitors to the region were less happy with a number of attributes important to visitors, resulting in lower visitor satisfaction with the region. However, the survey results show that the region's strengths currently lie in the region performing well as a family friendly destination, within a short driving distance from Sydney. Being able to escape and relax, spend time with family and reconnect were key motivators for visiting the region that the region delivered on.

Recommendations

The following recommendations are made for further consideration to assist the local industry with improving the region's productive capacity.

1. Stimulating consumer demand

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

2. Improving product and service delivery

- The internet is a key source for visitors to obtain information on the region and to make bookings before their trip. The local industry should be encouraged to become more proficient in digital marketing and distribution, ensuring visitors can access information on the region easily online.
- Encouraging visitors to disperse across the entire region is important. Information services (including online), and improved visitor information services, signage and roads are ways of achieving this.
- Delivering quality tourism experiences is more than just delivery of the tourism product. Delivery needs to encompass all factors that contribute to the whole visitor experience including accessibility, supporting infrastructure, services and amenities, and quality service delivery as well as the natural and urban environment.

3. Product development and diversification

- The opportunity for children to enjoy themselves on holiday, the natural beauty, and the ability to relax and spend time with others are key drivers for visitors considering travelling to the Forster-Tuncurry region. Future tourism development aimed at these markets should take into account these highly desirable characteristics of the region.
- Adapting tourism products and experiences to respond to the ever-changing competitive environment, particularly around changing consumer attitudes and travel behaviour.

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Image: Sunset at Forster, New South Wales
Courtesy of Great Lakes Tourism

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