Coffs Coast region Visitor Profile and Satisfaction Survey
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Background
Coffs Coast region VPS project

The Coffs Coast region 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 during January and February 2011.
Data collection

**Recruitment survey**
- Basic demographics
- Expenditure

**Face-to-face intercept interviews at selected locations**

**Main survey**
- Profiling
- Travel paths
- Expectations
- Satisfaction

**Postcards left as different locations**

**Self completion (by mail)**
The VPS research design tends to under-represent VFR and business visitors in the survey sample.

Survey sample

Sample
n = 207

Domestic visitors
n = 192

- Holiday/leisure
  n = 134 (70%)
  NVS 3 yrs to 2010 (55%)

- VFR
  n = 42 (22%)
  NVS 3 yrs to 2010 (32%)

- Business
  n = 10 (5%)
  NVS 3 yrs to 2010 (10%)

- Other
  n = 6 (3%)
  NVS 3 yrs to 2010 (4%)

International visitors
n = 15

n = 9 Domestic day visitor

NVS sample includes the Coffs Coast region and Bellingen Local Government Areas and is the average for the March quarters.
Domestic overnight holiday/leisure survey sample

<table>
<thead>
<tr>
<th></th>
<th>VPS Sample</th>
<th>NVS Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age group</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 to 34 years</td>
<td>13%</td>
<td>26%</td>
</tr>
<tr>
<td>35 to 54 years</td>
<td>60%</td>
<td>41%</td>
</tr>
<tr>
<td>55+ years</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Life stage</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Young/midlife singles/couples</td>
<td>8%</td>
<td>25%</td>
</tr>
<tr>
<td>Families</td>
<td>68%</td>
<td>38%</td>
</tr>
<tr>
<td>Older singles/couples</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Origin</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NSW</td>
<td>66%</td>
<td>69%</td>
</tr>
<tr>
<td>Qld</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Vic</td>
<td>22%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Accommodation used</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial caravan or camping</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>Friends/relatives property</td>
<td>6%</td>
<td>23%</td>
</tr>
<tr>
<td>Hotel, resort, motel or motor inn</td>
<td>21%</td>
<td>38%</td>
</tr>
<tr>
<td>Rented house, apartment, flat, unit</td>
<td>25%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

NVS sample includes the Coffs Coast region and Bellingen Local Government Areas and is the average for the March quarters 2008 to 2010. Only holiday/leisure visitors (excluding VFR) are included in both the VPS and NVS samples.
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. Only the most recent waves for each destination are included.

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

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

- Batemans Bay
- Greater Port Macquarie
- Maroochy

Coffs Coast region data are included in the benchmark.

More detail on the Benchmark Summary is provided in the Appendix.
Discussion of findings
Discussion of findings

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 within 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 and expectations of visitors and travel planning habits.

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.
Discussion of findings

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 is 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%).
- 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.
Discussion of findings

Visitor and trip characteristics cont.

- 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 and those travelling with their immediate family with 65% of repeat visitors and 68% of family travel groups deciding to visit more than 3 months in advance.
- 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 commercial caravan or 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 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 their respective 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 experiences* (51%, 4 points above), and
- *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 keeping the kids happy when choosing a holiday in the Coffs Coast.
Discussion of findings

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 and learn something new while in the ACT.
Discussion of findings

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%.
Discussion of findings

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 one would expect this to have 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, The TRA’s research team has 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.
Discussion of findings

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

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

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 about 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 a 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 commercial caravan and camping grounds is 50%, indicating that this is a very positive result for Coffs Coast caravan parks.
Discussion of findings

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.
Discussion of findings

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 indicates that the region is much stronger as a whole than as individual localities.
Discussion of findings

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 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.
Discussion of findings

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 to achieve 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.
Visitor and trip characteristics
Visitor profile (during the survey period)

- Trip purpose
- Age
- Life stage
- Travel party
- Origin
Over seven in ten visitors visited for holiday purposes, including entertainment.

- There was a high proportion of visitors visiting friends and relatives compared with the subgroup and all destination benchmarks.
- 51% of those visiting friends and/or relatives would have still visited the region if their friends and/or relatives were not there.

### Purpose Coffs Subgroup All

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Coffs</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>71%</td>
<td>-7%</td>
<td>-6%</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>21%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Business</td>
<td>5%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>-1%</td>
<td>-3%</td>
</tr>
</tbody>
</table>
## Profile of visitors by purpose of visit

<table>
<thead>
<tr>
<th></th>
<th>Holiday/leisure* (71%)</th>
<th>VFR (21%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>35 to 54 years</td>
<td>59% (n = 147)</td>
<td>36% (n = 44)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>39% 55+ years</td>
</tr>
<tr>
<td>Family lifestage</td>
<td>63% (n = 141)</td>
<td>31% (n = 42)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>24% older singles/couples</td>
</tr>
<tr>
<td>Travel with immediate family</td>
<td>52% (n = 147)</td>
<td>32% (n = 44)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>32% travelled with partner</td>
</tr>
<tr>
<td>Intrastate</td>
<td>64% (n = 132)</td>
<td>41% (n = 41)</td>
</tr>
<tr>
<td>Length stay in region (Nights)</td>
<td>Mean = 9; Median = 7 (n = 144)</td>
<td>Mean = 10; Median = 7 (n = 44)</td>
</tr>
<tr>
<td>Stayed in commercial caravan or camping accommodation</td>
<td>38% (n = 138)</td>
<td>12% (n = 43)</td>
</tr>
<tr>
<td></td>
<td>16% stayed in rented houses</td>
<td>63% stayed with friends and/or relatives</td>
</tr>
<tr>
<td></td>
<td>14% stayed in standard hotel, motel</td>
<td></td>
</tr>
</tbody>
</table>

* Holiday/leisure includes travel for Entertainment/attending a special event
** Base includes travel for Work or business, Conferences/exhibitions/conventions/trade fair and Other purposes
A higher proportion of visitors were 35 to 54 years compared with the benchmark

- Visitors aged 15 to 34 either travelled with their immediate family (30%) or with friends and/or relatives (30%)
- Visitors aged 35 to 54 mainly travelled with their immediate family (64%)
- Visitors aged 55 years or over either travelled with their partner (44%) or with friends and/or relatives (25%)
Over half of visitors were in the family life stage group, a higher proportion than the benchmarks.

The majority of these (72%) travelled with the family.

<table>
<thead>
<tr>
<th>Life Stage</th>
<th>Coffs</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young/midlife single</td>
<td>10%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Young/midlife couple</td>
<td>7%</td>
<td>-2%</td>
<td>-5%</td>
</tr>
<tr>
<td>Family</td>
<td>53%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>Older working single/couple</td>
<td>15%</td>
<td>-4%</td>
<td>-4%</td>
</tr>
<tr>
<td>Older non-working single/couple</td>
<td>15%</td>
<td>-13%</td>
<td>-14%</td>
</tr>
</tbody>
</table>

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 compared with the subgroup and all destination benchmarks.
- 91% of those travelling in their immediate family were repeat visitors to the region.

**Travel Party**

<table>
<thead>
<tr>
<th></th>
<th>Coffs</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>6%</td>
<td>0%</td>
<td>-2%</td>
</tr>
<tr>
<td>Couple</td>
<td>29%</td>
<td>-17%</td>
<td>-17%</td>
</tr>
<tr>
<td>Family</td>
<td>45%</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>Friends or relatives</td>
<td>19%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>-1%</td>
<td>-4%</td>
</tr>
</tbody>
</table>

“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 were from NSW.

93% of visitors were domestic visitors. There were fewer international visitors than the VPS benchmark (4 points less) and the subgroup (2 points less).

Over half of the visitors from NSW were from areas north of Sydney.

“In which State or Territory do you reside? ”
“What is your home postcode ”
Summary

- 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. Both these proportions were higher than the benchmarks.

- The majority of visitors visited the region for holiday/leisure purposes (includes travel for entertainment) (71%). Most of these visitors were travelling with their immediate family (53%).

- Over a fifth visited the region to visit friends and/or relatives, a higher proportion compared with the benchmarks. These visitors were either travelling with their immediate family (32%) or with friends and/or relatives (32%).

- The majority (93%) of visitors were travelling domestically.

- Nearly six in ten (57%) domestic visitors were from NSW, with 52% of them from areas north of Sydney.
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.

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

"How many times have you visited the Coffs Coast region, including both day trips and overnight trips?"
## Profile of visitors by first/repeat visitor

<table>
<thead>
<tr>
<th></th>
<th>First time visitor* (16%)</th>
<th>Repeat visitor (84%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>35 to 54 years</td>
<td>55% (n = 33)</td>
<td>51% (n = 173)</td>
</tr>
<tr>
<td>Family lifestage</td>
<td>42% (n = 31)</td>
<td>55% (n = 167)</td>
</tr>
<tr>
<td>Travel with immediate family</td>
<td>24% (n = 33)</td>
<td>49% (n = 173)</td>
</tr>
<tr>
<td></td>
<td>36% travelled with partner</td>
<td></td>
</tr>
<tr>
<td></td>
<td>30% travelled with friends/relatives</td>
<td></td>
</tr>
<tr>
<td>Intrastate</td>
<td>57% (n = 21)</td>
<td>57% (n = 167)</td>
</tr>
<tr>
<td>Length stay in region (Nights)</td>
<td>Mean = 7 (n = 33)</td>
<td>Mean = 9 (n = 168)</td>
</tr>
<tr>
<td></td>
<td>Median = 3</td>
<td></td>
</tr>
<tr>
<td>Stayed in commercial</td>
<td>17% (n = 30)</td>
<td>34% (n = 163)</td>
</tr>
<tr>
<td>caravan or camping</td>
<td>23% stayed in standard hotel, motel</td>
<td>20% stayed with friends and/or relatives</td>
</tr>
<tr>
<td>accommodation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base = 206
* Small base
The majority of visitors planned more than 3 months in advance

- The proportion who planned 3 months in advance was much higher than the subgroup and all destination benchmarks.
- This was driven by repeat visitors and those travelling with their immediate family with 65% of repeat visitors and 68% of family travel groups deciding to visit more than 3 months in advance.
- 30% of first time visitors decided to visit while on the road.

Base = 197

“When was the decision made to visit the Coffs Coast region?”
Previous experience and the internet were the mains sources of information.

The proportion who used both these sources of information were above the subgroup and all destination benchmarks.

Information Sources - Non internet

<table>
<thead>
<tr>
<th>Source</th>
<th>Coffs</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Been there before</td>
<td>60%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>The internet (Online)</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends or relatives</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel book, guide or brochure (Not online)</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist office/visitor information centre (Not online)</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motoring associations</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising/travel articles or documentaries (TV, radio or print)</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel agent (Not online)</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base = 204

Which of the following did you use to obtain information for this trip to the Coffs Coast region?
The majority of visitors only used their previous experience and/or the internet only.

- First time visitors either used the internet only (33%) or a combination of internet and non-internet sources (33%).
- Repeat visitors used their previous experience (38%) or the internet only (32%).

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

Base = 204
Accommodation operator sites were the most popular source for information

- Accommodation operator sites: 53%
- Official Government and Tourism sites: 40%
- 3rd party accommodation sites: 20%
- Travel Guide sites: 14%
- Airline company sites: 14%
- Testimonial sites: 8%
- Travel agency sites: 3%
- Car hire company sites: 2%
- 3rd party airline sites: 2%
- 3rd party car hire sites: 1%
- Other type of sites: 17%

This was the case for first and repeat visitors as well as different travel party types.

- The proportion visiting Official Government and Tourism Sites was driven by repeat visitors with 48% of repeat visitors using this site for information.

- The proportions who used Accommodation operator sites (15 points above), Official Government and Tourism sites (19 points above) and Airline company sites (6 points above) were above the all destination benchmarks.

- Real estate sites and Google were given as other sites visited.

*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

- The proportion who used the internet was similar to the subgroup and all destination benchmarks
- The proportion not making any bookings was similar to the subgroup benchmark
- Those travelling in smaller groups (with a partner or alone) were more likely not to make any bookings than larger groups (39% of small groups compared with 25% of larger groups)

Directly with a real estate or accommodation operator were given as other booking methods

<table>
<thead>
<tr>
<th>Prior Bookings - Non internet</th>
<th>Coffs</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>No prior bookings made</td>
<td>29%</td>
<td>-2%</td>
<td>-8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prior bookings - Internet sites</th>
<th>Coffs</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>No prior bookings made on internet</td>
<td>53%</td>
<td>0%</td>
<td>-3%</td>
</tr>
</tbody>
</table>
Accommodation operator sites were the most popular sites for booking

• Accommodation operator sites: 54%
• 3rd party accommodation sites: 29%
• Airline company sites: 20%
• Official Government and Tourism sites: 18%
• Travel Guide sites: 7%
• Testimonial sites: 5%
• Travel agency sites: 5%
• 3rd party airline sites: 1%
• Other type of sites: 7%

• This was the case for first and repeat visitors as well as different travel party types.
• The proportions who used Accommodation operator sites (10 points above), Official Government and Tourism sites (12 points above) and Travel guide sites (5 points above) were above the all destination benchmarks.

Base = 83

‘You mentioned that you used the internet for booking. What are the type of websites you went to?’
About 37% of visitors used coffcoast.com.au
Accommodation operator sites and coffscoast.com.au were the most useful sites

- Accommodation operator sites: 29%
- coffscoast.com.au: 24%
- Official Government and Tourism sites: 11%
- 3rd party accommodation sites: 8%
- Airline company sites: 7%
- midnorthcoastnsw.com.au: 3%
- visitnsw.com.au: 3%
- Travel Guide sites: 3%
- waterfallway.com: 1%
- Testimonial sites: 1%
- Other type of sites: 9%

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

➢ Over four in five visitors were repeat visitors – 16 points above the all destination benchmark.

➢ Nearly half (49%) of repeat visitors travelled with their immediate family where as first time visitors either travelled with their partner (36%) or with friends and/or family (30%).

➢ More then three in five (61%) visitors planned more than 3 months in advance. This was driven by repeat visitors and those travelling with their immediate family with 65% of repeat visitors and 68% of family travel groups deciding to visit more than 3 months in advance.

➢ Previous experience and the internet 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 – a similar proportion to the subgroup and all destination benchmarks.

➢ Accommodation operator 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 Coffs Coast region

- Transport used
- Routes taken in and out
- Locations visited
The majority of visitors to the region were self drive

### Graph

- **Private/own vehicle**: 82%
- **Air transport**: 8%
- **Bus/coach**: 4%
- **Rented/hire vehicle**: 3%
- **Railway**: 3%
- **Other**: 0%

This was a higher proportion than the all destination benchmark, but similar to the subgroup.

**Question:** What was the main form of transport that you used to get to the Coffs Coast region?

**Base**: 207

"What was the main form of transport that you used to get to the Coffs Coast region?"
Which route did you mainly travel to get to the Coffs Coast region?
Which route did you mainly travel to leave the Coffs Coast region?

Routes used to leave the Coffs Coast region

- To the north via the Pacific Highway (25%)
- Oxley Highway (via Port Macquarie or Tamworth or Gunnedah) (4%)
- The Waterfall Way (via Armidale or Inverell or Moree) (15%)
- Other (2%)
- To the south via the Pacific Highway (54%)
“On this trip which, if any, of the following towns did you visit?”

- Woolgoolga: 22%
- Emerald Beach: 10%
- Moonee Beach: 9%
- Korora: 11%
- Coffs Harbour: 81%
- Sawtell: 47%
- Stepton: 5%
- Mylestom: 6%
- Urunga: 26%
- Bellingen: 35%
- Dorridge: 17%
- Valla Beach: 5%
- Nambucca Heads: 15%
Towns visited during trip – day visit

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

Bases: Coffs Harbour (160); Sawtell (97); Bellingen (71); Urunga (51); Woolgoolga (42); Dorrigo (34*); Nambucca Heads (31*); Korora (22*); Emerald Beach (20*); Moonee Beach (19*); Mylestom (12*); Repton (10*); Valla Beach (9*)

* Small base

Percentages are expressed as the percentage of all visits (day and overnight) to each town.
On this trip which, if any, of the following towns did you visit?

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

Bases: Coffs Harbour (160); Sawtell (97); Bellingen (71); Urunga (51); Woolgoola (42); Dorrigo (34*); Nambucca Heads (31*); Korora (22*); Emerald Beach (20*); Moonee Beach (19*); Mylestom (12*); Repton (10*); Valla Beach (9*)

* Small base
## Profile of visitors by towns visited

<table>
<thead>
<tr>
<th></th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo (57%)</th>
<th>Visited Bellingen/Dorrigo* (43%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>35 to 54 years</td>
<td>50% (n = 107)</td>
<td>58% (n = 80)</td>
</tr>
<tr>
<td>Family lifestage</td>
<td>52% (n = 101)</td>
<td>56% (n = 79)</td>
</tr>
<tr>
<td>Travel with immediate family</td>
<td>42% (n = 107)</td>
<td>48% (n = 80)</td>
</tr>
<tr>
<td></td>
<td>32% travelled with partner</td>
<td></td>
</tr>
<tr>
<td>Intrastate</td>
<td>54% (n = 94)</td>
<td>62% (n = 76)</td>
</tr>
<tr>
<td>Repeat visitor</td>
<td>79% (n = 107)</td>
<td>88% (n = 80)</td>
</tr>
<tr>
<td>Length stay in region (Nights)</td>
<td>Mean = 8 Median = 6 (n = 105)</td>
<td>Mean = 10 Median = 7 (n = 78)</td>
</tr>
</tbody>
</table>

Base = 187

* Could be in combination with Coffs Harbour
Summary

- The majority (85%) of the visitors to the region were self drive.
- More than four in five visitors (81%) travelled to the Coffs Coast region via the Pacific Highway. About 72% of these visitors travelled from the south.
- Just less than four in five visitors (79%) left the Coffs Coast region via the Pacific Highway. About 69% of these visitors travelled south.
- Coffs Harbour was the most popular place to stop at in the Coffs Coast region with 81% of visitors stopping there during their trip. Of those who stopped at Coffs Harbour 48% stopped during the day and 44% stopped for more than one night.
- Of those who stayed overnight in Coffs Harbour, 35% visited Sawtell and 24% visited Bellingen.
- Other popular stops along the coast included Sawtell (47%), Urunga (26%) and Woolgoola (22%), all both day trip and overnight stops.
- In terms of inland stops, 35% of visitors stopped at Bellingen and 17% at Dorrigo. Nearly nine in ten visitors to each of these towns stopped for a day trip.
Staying in the Coffs Coast region

- Length of stay
- Accommodation used
- Profile of different accommodation users
- Expenditure
The majority of visitors stayed at least 4 nights in the region.

- 96% of visitors to the region stayed at least one night.
- Repeat visitors stayed longer than first time visitors (Median 7 nights and 3 nights respectively).

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

How many nights did you stay in the Coffs Coast region during this trip?

Base = 193

Base = 204

Nights in Coffs Coast

- 1 night: 6%
- 2 nights: 41%
- 3 nights: 33%
- 4 to 7 nights: 9%
- More than 7 nights: 11%

Nights for entire trip

- 1 night: 6%
- 2 nights: 41%
- 3 nights: 33%
- 4 to 7 nights: 9%
- More than 7 nights: 11%
Commercial caravan or camping was the most popular accommodation used

- The most common accommodation for repeat visitors was commercial caravan and camping (34%) or with friends and/or relatives (20%).
- The most common accommodation for first-time visitors was standard hotels (23%) or backpackers (20%).
- The most common accommodation for those travelling with their immediate family was commercial caravan or camping (34%) or rented houses/apartments/units (21%).

“What type of accommodation did you mainly use in the Coffs Coast region?”
## Profile of different accommodation users

<table>
<thead>
<tr>
<th></th>
<th>Commercial caravan or camping (31%)</th>
<th>Hotels, motels, motor inn or luxury resort (23%)</th>
<th>Serviced apartment or Rented house (18%)</th>
<th>Other accommodation (28%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean = 11</td>
<td>Mean = 4</td>
<td>Mean = 10</td>
<td>Mean = 11</td>
</tr>
<tr>
<td></td>
<td>Median = 10</td>
<td>Median = 3</td>
<td>Median = 7</td>
<td>Median = 7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>35 to 54 years</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50% (n = 60)</td>
<td>51% (n = 45)</td>
<td>71% (n = 34*)</td>
<td>40% (n = 55)</td>
</tr>
<tr>
<td>Family lifestage</td>
<td>59% (n = 58)</td>
<td>46% (n = 41)</td>
<td>79% (n = 34*)</td>
<td>34% (n = 53)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>37% Older groups</td>
<td></td>
<td>34% Older groups</td>
</tr>
<tr>
<td>Travel with immediate family</td>
<td>52% (n = 60)</td>
<td>33% (n = 45)</td>
<td>71% (n = 34*)</td>
<td>36% (n = 55)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>40% travelled with partner</td>
<td></td>
<td>27% travelled with friends/relatives; 25% with partner</td>
</tr>
<tr>
<td>Intrastate</td>
<td>57% (n = 60)</td>
<td>44% (n = 36)</td>
<td>79% (n = 34*)</td>
<td>54% (n = 46)</td>
</tr>
<tr>
<td>Repeat visitor</td>
<td>92% (n = 60)</td>
<td>76% (n = 45)</td>
<td>91% (n = 34*)</td>
<td>80% (n = 54)</td>
</tr>
<tr>
<td>Length stay in region (Nights)</td>
<td>Mean = 11</td>
<td>Mean = 4</td>
<td>Mean = 10</td>
<td>Mean = 11</td>
</tr>
<tr>
<td></td>
<td>Median = 10</td>
<td>Median = 3</td>
<td>Median = 7</td>
<td>Median = 7</td>
</tr>
</tbody>
</table>

Base = 194
* Small base
Overnight visitors spent nearly $100 per night

“How much have you spent so far in the Coffs Coast region, including any money paid before the trip, and excluding any package expenditure?”

“How much do you think you will spend in the Coffs Coast region for the remainder of your stay excluding any package expenditure?”

Base = 408
Note: From recruitment data file
Most of the expenditure in the region was on accommodation and meals.

- Accommodation: 38%
- Takeaways and restaurant meals: 19%
- Groceries: 13%
- Shopping, gifts and souvenirs: 12%
- Fuel: 8%
- Tours, entrance fees: 5%
- Package: 1%
- Other: 5%

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

- The majority of visitors stopped at least one night in the Coffs Coast region.

- The median stay was 7 nights, which was also the median stay with repeat visitors. The median stay for first time visitors was 3 nights.

- Commercial caravan or camping accommodation was the most common accommodation with 31% of visitors staying there. This was a higher proportion than both the subgroup and all destination benchmarks.

- Commercial caravan or camping accommodation was also the most common accommodation for repeat visitors and those travelling with families, whereas standard hotels/motels was the most common accommodation for first time visitors.

- Visitors who stayed at least one night spent $100 per night on average. The majority of the expenditure was on accommodation and meals.
Why they visited the Coffs Coast region and were they happy
Reasons for visiting the Coffs Coast region

- Reasons for choosing destination
- Expectations of experiences
- Importance of destination attributes
Reasons for visiting revolved around family and friends as well as the variety of things to see and do.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Main Reason</th>
<th>Most Important Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's a great place for a family holiday</td>
<td>27%</td>
<td>42%</td>
</tr>
<tr>
<td>There's a variety of things to see and do</td>
<td>6%</td>
<td>26%</td>
</tr>
<tr>
<td>To visit family there</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>To visit friends there</td>
<td></td>
<td>19%</td>
</tr>
<tr>
<td>It was a convenient stop-over point</td>
<td>9%</td>
<td>15%</td>
</tr>
<tr>
<td>It is a great place to spend time with my partner</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>To visit a specific attraction(s)</td>
<td>6%</td>
<td>14%</td>
</tr>
</tbody>
</table>

The main reasons for visiting the region for first time visitors were the variety (30%) and convenience (24%).

This chart continued on next slide......
There were good deals on air fares

It's a place that is untouched, undeveloped

To experience nature

To attend a specific event or exhibition

It was recommended by friends/travel agent

To learn about the natural environment

There were good deals on air fares

……. continued from previous slide

“Why did you chose the Coffs Coast region?”
‘Which of the following was most important in choosing the Coffs Coast region?”

Bases: All respondents Main Reason = 200
All respondents Most important = 199
Expectations for relaxing, spending time with others and something for the kids were above the benchmark

- Relaxation and rejuvenation: 78% (Coffs Coast), 91% (Benchmark)
- Spend quality time with partner/family/friends: 75% (Coffs Coast), 86% (Benchmark)
- Nature based experiences: 67% (Coffs Coast), 68% (Benchmark)
- Tour around and explore: 67% (Coffs Coast), 80% (Benchmark)
- Something the kids would enjoy: 32% (Coffs Coast), 54% (Benchmark)
- Good shopping: 40% (Coffs Coast), 51% (Benchmark)
- Food and wine experiences: 47% (Coffs Coast), 51% (Benchmark)

This chart continued on next slide......
“Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer?”

- Discover or learn something new: Coffs Coast 43%, Benchmark 59%
- An adventure: Coffs Coast 36%, Benchmark 49%
- Luxury and indulgence: Coffs Coast 26%, Benchmark 35%
- Enjoyable nightlife and entertainment: Coffs Coast 26%, Benchmark 21%
- Experience arts or culture: Coffs Coast 25%, Benchmark 38%
- Experience our nation's/Australia's history: Coffs Coast 19%, Benchmark 52%
### Expectations of different visitors – more likely to expect

<table>
<thead>
<tr>
<th>Expectations above expectations of all visitors to Coffs Coast (More than 3 points above)</th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo</th>
<th>Visited Bellingen/Dorrigo</th>
<th>Holiday/leisure visitors</th>
<th>VFR visitors</th>
</tr>
</thead>
</table>
| None | • Nature based experiences  
• Tour around and explore  
• A chance to discover and learn something new  
• An opportunity to experience our nation’s/Australia’s history  
• Food and wine experiences | • Luxury and indulgence  
• An adventure  
• A chance to discover and learn something new  
• Something the kids would enjoy  
• Good shopping  
• Food and wine experiences | • Relaxation and rejuvenation  
• Spend quality time with others |

- Visitors to Bellingen/Dorrigo were more likely to expect experiences around nature, touring around, discovering something new, experiencing history and food and wine experiences than visitors to the region in general.
- VFR visitors were more likely to expect experiences around relaxation and rejuvenation and spending quality time with others than visitors to the region in general.

“On this trip which, if any, of the following towns did you visit?”
“Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer?”
Expectations of different visitors – less likely to expect

<table>
<thead>
<tr>
<th>Expectations below expectations of all visitors to Coffs Coast (More than 3 points below)</th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo</th>
<th>Visited Bellingen/Dorrigo</th>
<th>Holiday/leisure visitors</th>
<th>VFR visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Nature based experiences</td>
<td>None</td>
<td>None</td>
<td>• Luxury and indulgence</td>
<td>• Nature based experiences</td>
</tr>
<tr>
<td>• Tour around and explore</td>
<td></td>
<td></td>
<td>• An adventure</td>
<td>• Tour around and explore</td>
</tr>
<tr>
<td>• Food and wine experiences</td>
<td></td>
<td></td>
<td>• An opportunity to experience art/culture</td>
<td>• An opportunity to experience art/culture</td>
</tr>
<tr>
<td><strong>Visitors to Coffs Harbour but not Bellingen/Dorrigo</strong></td>
<td></td>
<td></td>
<td>• A chance to discover and learn something new</td>
<td>• A chance to discover and learn something new</td>
</tr>
<tr>
<td><strong>Visitors to Coffs Harbour but not Bellingen/Dorrigo</strong></td>
<td></td>
<td></td>
<td>• Something the kids would enjoy</td>
<td>• Something the kids would enjoy</td>
</tr>
<tr>
<td><strong>Visitors to Coffs Harbour but not Bellingen/Dorrigo</strong></td>
<td></td>
<td></td>
<td>• Enjoyable nightlife or entertainment</td>
<td>• Enjoyable nightlife or entertainment</td>
</tr>
<tr>
<td><strong>Visitors to Coffs Harbour but not Bellingen/Dorrigo</strong></td>
<td></td>
<td></td>
<td>• Good shopping</td>
<td>• Good shopping</td>
</tr>
<tr>
<td><strong>Visitors to Coffs Harbour but not Bellingen/Dorrigo</strong></td>
<td></td>
<td></td>
<td>• Food and wine experiences</td>
<td>• Food and wine experiences</td>
</tr>
</tbody>
</table>

- Visitors to Coffs Harbour but not Bellingen/Dorrigo were less likely to expect experiences around nature, touring around and food and wine experiences than visitors to the region in general.
- VFR visitors were less likely to expect experiences around luxury, touring around, experiencing art/culture, discovering something new, something for the kids, good nightlife, shopping and food and wine experiences than visitors to the region in general.

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

“What was the main purpose of the trip?”

“Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer?”
Summary

- The main reason for visiting the Coffs Coast region was because it was a great place for a family holiday with 42% of visitors giving this as a reason for visiting.

- Other reasons included because there was variety of things to see and do (26%), to visit family there (24%) and to visit friends there (19%).

- The main reasons for visiting for first time visitors was the variety of things to see and do (30%) and because it was a convenient stopover (24%).

- The main experiences expected by visitors was to relax and rejuvenate (91%) and to spend quality time with partner/family/friends (86%). Both these experiences were above the subgroup and all destination benchmarks.

- Something the kids would enjoy (54%) and shopping (51%) were also experiences where expectations were above the subgroup and all destination benchmarks.

- Visitors to Bellingen/Dorrigo were more likely to expect experiences around nature, touring around, discovering something new, experiencing history and food and wine experiences than visitors to the region in general.

- VFR visitors were more likely to expect experiences around relaxation and rejuvenation and spending quality time with others than visitors in general.
What did they do in the Coffs Coast region?

- Activities
- Attractions
Over three quarters of visitors went to the beach

- Eating out, going to the beach, shopping, visiting the markets, picnics/BBQs and fishing were all above both the subgroup and all destination benchmarks.
- Besides visiting friends and/or relatives, VFR visitors were more likely to go shopping, to the markets, to the movies, visit botanical gardens or other gardens and visit museums/art galleries than visitors in the region for holiday/leisure.
On this trip to the Coffs Coast region, which of the following activities did you undertake?

- Nature based activities like visiting National/State Parks and bushwalking/rainforest walks; cultural activities like visiting history/heritage sites and museums/art galleries and going on charter boats/crises/ferries or organised tours were all below both the subgroup and all destination benchmarks.
The Coffs shopping precinct and the Coffs Jetty were the most visited attractions

- Coffs shopping precinct: 69%
- Coffs Jetty: 65%
- Big Banana: 36%
- Bellingen shopping precinct: 32%
- Pet Porpoise pool: 27%
- Bellingen river: 18%
- Urunga Boardwalk: 18%
- Dorrigo National Park: 18%
- Dorrigo shopping precinct: 11%
- Raleigh International Raceway: 6%
- National Marine Science Centre’s aquarium: 3%
- Valery trails: 2%
- Other: 10%
- Base = 205

• VFR visitors were more likely to visit the Coffs and Bellingen shopping precincts and the Coffs Jetty than visitors in the region for holiday/leisure.

• Visitors to the Pet Porpoise pool were more likely to be very satisfied with the attractions than both the subgroup and benchmark. More than six in ten (61%) of visitors who visited the Pet Porpoise pool were very satisfied with the attractions on the Coffs Coast.

“Please select all the attractions that you visited in the Coffs Coast region, only selecting those attractions that you actually stopped at.”
Please select all the attractions that you visited in the Coffs Coast region, only selecting those attractions that you actually stopped at.
Summary

- The most popular activities for visitors to the Coffs Coast were eating out (80%), sightseeing (78%), going to the beach (76%) and shopping (73%).

- Eating out, going to the beach, shopping, visiting the markets, picnics/BBQs and fishing were all above both the subgroup and all destination benchmarks.

- In contrast nature based activities like visiting National/State Parks and bushwalking/rainforest walks; cultural activities like visiting history/heritage sites and museums/art galleries and going on charter boats/crises/ferries or organised tours were all below both the subgroup and all destination benchmarks.

- Besides visiting friends and/or relatives, VFR visitors were more likely to go shopping, to the markets, to the movies, visit botanical gardens or other gardens and visit museums/art galleries than visitors in the region for holiday/leisure.

- The majority of visitors visited the Coffs shopping precinct (69%) and the Coffs Jetty (65%).

- Other commonly visited attractions included the Big Banana (36%), Bellingen shopping precinct (32%) and the Pet Porpoise pool (27%).
Summary

- VFR visitors were more likely to visit the Coffs and Bellingen shopping precincts and the Coffs Jetty than visitors in the region for holiday/leisure.

- Visitors to the Pet Porpoise pool were more likely to be very satisfied with the attractions than both the subgroup and benchmark. More than six in ten (61%) of visitors who visited the Pet Porpoise pool were very satisfied with the attractions on the Coffs Coast.
Visitor satisfaction in the Coffs Coast region

- Overall satisfaction
- Were expectations met
- Satisfaction with destination attributes
- Recommendation
- Revisitation
Just under half of visitors were very satisfied with their visit overall.

Although the proportion ‘very satisfied’ was less than the subgroup and all destination benchmarks, the proportion satisfied overall was slightly above the benchmarks.

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

Key Metrics

<table>
<thead>
<tr>
<th></th>
<th>Total Sat</th>
<th>V Sat</th>
<th>Total Dis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Satisfaction</td>
<td>88%</td>
<td>48%</td>
<td>9%</td>
</tr>
<tr>
<td>Difference to subgroup</td>
<td>1%</td>
<td>-5%</td>
<td>-1%</td>
</tr>
<tr>
<td>Difference to all</td>
<td>3%</td>
<td>-3%</td>
<td>-2%</td>
</tr>
</tbody>
</table>

Base = 206
Overall satisfaction differed by different segments

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

- Visited Coffs Harbour (Not Bellingen/Dorrigo)
  - 42%
- Visited Bellingen/Dorrigo
  - 55%
- Younger/midlife singles/couples
  - 38%
- Families
  - 47%
- Older singles/couples
  - 57%
- Friends and/or relatives travelling together
  - 68%
- Immediate family travelling together
  - 44%
- Travelling with partner
  - 48%
- Holiday/leisure
  - 50%
- Visiting friends and relatives
  - 48%
- First time visitor
  - 58%
- Repeat visitor
  - 46%
- Stayed at a commercial caravan or camping
  - 57%
- Stayed at a hotel, motel, motor in or luxury resort
  - 36%
- Stayed at a serviced apartment or rented house
  - 50%
- Stayed in other accommodation
  - 42%
- Coffs Coast - All visitors
  - 48%
- Benchmark
  - 51%
Expectations were better than expected for something for the kids and shopping compared with the benchmark

- **Something the kids would enjoy**: Better than expected 59%, As expected 35%, Worse than expected 5% (n=111)
- **Spend quality time with partner/family/friends**: Better than expected 56%, As expected 42%, Worse than expected 2% (n=176)
- **Good shopping**: Better than expected 44%, As expected 50%, Worse than expected 6% (n=105)
- **Tour around and explore**: Better than expected 43%, As expected 51%, Worse than expected 5% (n=136)
- **Nature based experiences**: Better than expected 41%, As expected 55%, Worse than expected 4% (n=137)
- **Relaxation and rejuvenation**: Better than expected 41%, As expected 57%, Worse than expected 2% (n=186)

This chart continued on next slide……
“Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer? If you answer YES, please indicate how well the region met this expectation.”

Food and wine experiences
- Better than expected: 38%
- As expected: 56%
- Worse than expected: 6%
- n = 104

Discover or learn something new
- Better than expected: 38%
- As expected: 54%
- Worse than expected: 8%
- n = 87

Experience our nation’s/Australia’s history
- Better than expected: 37%
- As expected: 58%
- Worse than expected: 5%
- n = 38*

An adventure
- Better than expected: 34%
- As expected: 62%
- Worse than expected: 4%
- n = 74

Experience arts or culture
- Better than expected: 31%
- As expected: 55%
- Worse than expected: 14%
- n = 51

Enjoyable nightlife and entertainment
- Better than expected: 28%
- As expected: 58%
- Worse than expected: 13%
- n = 53

Luxury and indulgence
- Better than expected: 23%
- As expected: 69%
- Worse than expected: 8%
- n = 71

* Small Base
Which, if any, of the experiences listed below did you expect the Coffs Coast region 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 Coffs Coast region to offer?

If you answer YES, please indicate how well the region met this expectation.

- Experience was not expected
- Experience was better than expected
- Experience was expected
- Experience was not better than expected
Which, if any, of the experiences listed below did you expect the Coffs Coast region 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

- Friendly service
  - Very important: 39%
  - Important: 55%
  - Neither important nor unimportant: 3%
  - Not important: 2%
  - Not at all important: 0%
  - n = 204

- Personal safety and security
  - Very important: 39%
  - Important: 44%
  - Neither important nor unimportant: 10%
  - Not important: 3%
  - Not at all important: 4%
  - n = 203

- Value for money
  - Very important: 33%
  - Important: 55%
  - Neither important nor unimportant: 7%
  - Not important: 2%
  - Not at all important: 2%
  - n = 203

- Roads
  - Very important: 29%
  - Important: 48%
  - Neither important nor unimportant: 14%
  - Not important: 6%
  - Not at all important: 2%
  - n = 203

- Friendliness of locals
  - Very important: 28%
  - Important: 53%
  - Neither important nor unimportant: 16%
  - Not important: 2%
  - Not at all important: 0%
  - n = 201

- Local atmosphere
  - Very important: 26%
  - Important: 62%
  - Neither important nor unimportant: 10%
  - Not important: 2%
  - Not at all important: 1%
  - n = 200

- Food and beverage
  - Very important: 25%
  - Important: 57%
  - Neither important nor unimportant: 14%
  - Not important: 3%
  - Not at all important: 1%
  - n = 205

- Public toilets
  - Very important: 23%
  - Important: 49%
  - Neither important nor unimportant: 17%
  - Not important: 6%
  - Not at all important: 5%
  - n = 202

- Signage
  - Very important: 20%
  - Important: 38%
  - Neither important nor unimportant: 20%
  - Not important: 11%
  - Not at all important: 10%
  - n = 201

Less than the VPS benchmark

This chart continued on next slide......
Again, thinking about your most recent trip to the Coffs Coast region, how important or unimportant was …
Satisfaction with shopping was above the benchmark

Drivers of overall satisfaction

- Personal safety and security: 53% Very satisfied, 36% Fairly satisfied, 10% Neither satisfied nor dissatisfied, 2% Dissatisfied
- Friendly service: 52% Very satisfied, 40% Fairly satisfied, 7% Neither satisfied nor dissatisfied, 1% Dissatisfied
- Local atmosphere: 52% Very satisfied, 39% Fairly satisfied, 6% Neither satisfied nor dissatisfied, 3% Dissatisfied
- Friendliness of locals: 50% Very satisfied, 38% Fairly satisfied, 9% Neither satisfied nor dissatisfied, 3% Dissatisfied
- Attractions: 42% Very satisfied, 35% Fairly satisfied, 20% Neither satisfied nor dissatisfied, 2% Dissatisfied
- Variety of things to see and do: 41% Very satisfied, 44% Fairly satisfied, 11% Neither satisfied nor dissatisfied, 4% Dissatisfied
- Food and beverage: 39% Very satisfied, 45% Fairly satisfied, 13% Neither satisfied nor dissatisfied, 3% Dissatisfied
- Shopping: 34% Very satisfied, 42% Fairly satisfied, 21% Neither satisfied nor dissatisfied, 2% Dissatisfied
- Commercial accommodation: 34% Very satisfied, 32% Fairly satisfied, 29% Neither satisfied nor dissatisfied, 5% Dissatisfied

Driver of overall satisfaction

- Greater than the VPS benchmark

This chart continued on next slide......

n = 199
n = 201
n = 194
n = 189
n = 197
n = 199
n = 193
n = 189
n = 197
n = 199
n = 193
n = 187
n = 163
…… continued from previous slide

Driver of overall satisfaction

- **Value for money**
  - Very satisfied: 29%
  - Fairly satisfied: 54%
  - Neither satisfied nor dissatisfied: 15%
  - Dissatisfied: 2%

- **Information services**
  - Very satisfied: 26%
  - Fairly satisfied: 39%
  - Neither satisfied nor dissatisfied: 33%
  - Dissatisfied: 2%

- **Signage**
  - Very satisfied: 24%
  - Fairly satisfied: 44%
  - Neither satisfied nor dissatisfied: 27%
  - Dissatisfied: 5%

- **Roads**
  - Very satisfied: 23%
  - Fairly satisfied: 47%
  - Neither satisfied nor dissatisfied: 20%
  - Dissatisfied: 11%

- **Public toilets**
  - Very satisfied: 19%
  - Fairly satisfied: 43%
  - Neither satisfied nor dissatisfied: 30%
  - Dissatisfied: 8%

- **Entertainment/nightlife**
  - Very satisfied: 14%
  - Fairly satisfied: 25%
  - Neither satisfied nor dissatisfied: 54%
  - Dissatisfied: 6%

- **Tours**
  - Very satisfied: 12%
  - Fairly satisfied: 14%
  - Neither satisfied nor dissatisfied: 72%
  - Dissatisfied: 2%

- **Local transport**
  - Very satisfied: 9%
  - Fairly satisfied: 12%
  - Neither satisfied nor dissatisfied: 73%
  - Dissatisfied: 5%

n = number of respondents

“And how satisfied or dissatisfied were you with….”
“Again, thinking about your most recent trip to the Coffs Coast region, how important or unimportant was …”

“And how satisfied or dissatisfied were you with …. ”
“Again, thinking about your most recent trip to the Coffs Coast region, how important or unimportant was …”

“And how satisfied or dissatisfied were you with…. ”
### Importance of attributes for different visitors – more important

<table>
<thead>
<tr>
<th>Proportion of visitors rating attributes as very important above the rating for all visitors to Coffs Coast (More than 3 points above)</th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo</th>
<th>Visited Bellingen/Dorrigo</th>
<th>Holiday/leisure visitors</th>
<th>VFR visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractions</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>Food and beverage</td>
</tr>
<tr>
<td>Roads</td>
<td></td>
<td></td>
<td></td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Personal safety and security</td>
</tr>
</tbody>
</table>

- The attractions and roads were more important to visitors to Coffs Harbour (but not to Bellingen/Dorrigo) than visitors to the region in general.
- Food and beverage, shopping, roads and personal safety and security were more important to VFR visitors than visitors to the region in general.

‘What was the main purpose of the trip?’

‘Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer?’

‘Again, thinking about your most recent trip to the Coffs Coast region, how important or unimportant was …’
### Importance of attributes for different visitors – less important

<table>
<thead>
<tr>
<th>Proportion of visitors rating attributes as very important below the rating for all visitors to Coffs Coast (More than 3 points below)</th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo</th>
<th>Visited Bellingen/Dorrigo</th>
<th>Holiday/leisure visitors</th>
<th>VFR visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Personal safety and security</td>
<td>• Shopping</td>
<td>• Roads</td>
<td>• Commercial accommodation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tours</td>
<td>• Signage</td>
<td>• Local transport</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Information services</td>
<td>• Public toilets</td>
<td>• Attractions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Value for money</td>
<td></td>
<td>• Information services</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Variety of things to see and do</td>
<td></td>
</tr>
</tbody>
</table>

• Commercial accommodation, local transport, attractions, information services and a variety of things to do were less important to VFR visitors than visitors to the region in general.

‘What was the main purpose of the trip?’

“Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer?”

“Again, thinking about your most recent trip to the Coffs Coast region, how important or unimportant was …”
### Satisfaction with attributes for different visitors – more satisfied

<table>
<thead>
<tr>
<th>Proportion of visitors very satisfied with attributes <strong>above</strong> the rating for all visitors to Coffs Coast (More than 3 points above)</th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo</th>
<th>Visited Bellingen/Dorrigo</th>
<th>Holiday/leisure visitors</th>
<th>VFR visitors</th>
</tr>
</thead>
</table>
| • Attractions  
• Roads  
• Tours  
• Personal safety and security  
• Public toilets  
• Value for money | • Food and beverage  
• Local atmosphere | • Commercial accommodation  
• Personal safety and security | • Shopping  
• Tours  
• Friendliness of locals |

- Visitors to Bellingen/Dorrigo were more satisfied with the food, beverage and local atmosphere than visitors to the region in general.
- VFR visitors were more satisfied with the shopping, tours and friendliness of the locals than visitors to the region in general.

Visitors also rated the attribute as ‘very important’.

‘What was the main purpose of the trip?’

“If, any, of the experiences listed below did you expect the Coffs Coast region to offer?”

“And how satisfied or dissatisfied were you with….”
### Satisfaction with attributes for different visitors – less satisfied

<table>
<thead>
<tr>
<th></th>
<th>Visited Coffs Harbour but not Bellingen/Dorrigo</th>
<th>Visited Bellingen/Dorrigo</th>
<th>Holiday/leisure visitors</th>
<th>VFR visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proportion of visitors</td>
<td>• Food and beverage</td>
<td>• Attractions</td>
<td>None</td>
<td>• Commercial accommodation</td>
</tr>
<tr>
<td>very satisfied with</td>
<td>• Local atmosphere</td>
<td>• Roads</td>
<td></td>
<td>• Local transport</td>
</tr>
<tr>
<td>attributes below the</td>
<td></td>
<td>• Tours</td>
<td></td>
<td>• Attractions</td>
</tr>
<tr>
<td>rating for all visitors</td>
<td></td>
<td>• Personal safety and</td>
<td></td>
<td>• Roads</td>
</tr>
<tr>
<td>to Coffs Coast (More than</td>
<td></td>
<td>security</td>
<td></td>
<td>• Personal safety and</td>
</tr>
<tr>
<td>3 points below)</td>
<td></td>
<td>• Value for money</td>
<td></td>
<td>security</td>
</tr>
</tbody>
</table>

- Visitors to Coffs Harbour (but note Bellingen/Dorrigo) were less satisfied with the food, beverage and local atmosphere than visitors to the region in general.
- VFR visitors were less satisfied with the commercial accommodation, local transport, attractions, roads and personal safety and security than visitors to the region in general. The roads and personal safety and security were attributes that were more important to these visitors than visitors to the region in general.

Visitors also rated the attribute as ‘very important’.

*What was the main purpose of the trip?*

*Which, if any, of the experiences listed below did you expect the Coffs Coast region to offer?*

*And how satisfied or dissatisfied were you with….”*
Visitors were less satisfied across all accommodation types compared with the benchmarks.

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

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

* Small Base
Visitors were happy with the beaches and scenery

- ‘We were and always have appreciated the efforts made to keep beaches patrolled and safe for all who use them properly, and that the beaches and public facilities are clean and family friendly.’ (45-54 years, repeat visitor)

- ‘Beautiful coastlines and National Parks that despite being School Holidays were not packed with people.’ (35-44 years, first time visitor)

- ‘Cleanliness of the beaches and main shopping areas of Coffs. Community in general was helpful with questions about directions and information needed.’ (45-54 years, repeat visitor)

- ‘Number of beachside caravan parks, life guards on most popular beaches’ (35-44 years, repeat visitor)

“What else about the Coffs Coast region were you particularly happy with on your recent visit?”
Visitors were happy with the commercial caravan parks

- ‘The excellent running of the Woolgoolga Beach caravan park! The great service of the life savers at the patrolled beach!' (45-54 years, repeat visitor)

- ‘I found the standard of the caravan park to be very high & the staff like-wise however I feel the increase in the cost over the so called "high season" to be rather excessive.’ (65+ years, repeat visitor)

- ‘I enjoyed the atmosphere of caravan park living and Urunga Heads Caravan park provided an excellent place to stay’ (45-54 years, repeat visitor)

- ‘We have been holidaying at Woolgoolga for 22 years now, and it is the camping community of friends we have built up in the month of January each year.’ (15-34 years, repeat visitor)

- ‘Urunga Heads Caravan Park where we stayed. Highly recommend this park to all.’ (65+ years, repeat visitor)

“What else about the Coffs Coast region were you particularly happy with on your recent visit?”
Visitors were happy with the Bellingen and Sawtell

- ‘Loved the hinterland and bushwalks/waterfalls around Dorrigo. Loved Sawtell - the beach and the main street. The markets in Bellingen were interesting too.’ (35-44 years, repeat visitor)

- ‘I have visited Sawtell at least once a year for most of my life. I love the place, the surf, the atmosphere and the leisure opportunities it offers. Coffs is great for shopping etc. I love Bellingen for its markets, shops and the vibe.’ (45-54 years, repeat visitor)

- ‘Sawtell is a delightful village which has a combination of shops, restaurants, good coffee plus being an old fashioned assize beach holiday place at the same time. If it stays that way I'll be back every year. If it becomes overdeveloped I won't.’ (55-64 years, repeat visitor)

- ‘It is lovely to be able to directly access the water - rivers and beaches. Really enjoy Bellingen - great and interesting shopping. highway has been improved but needs more work.’ (55-64 years, repeat visitor)

“What else about the Coffs Coast region were you particularly happy with on your recent visit?”
Visitors were happy with the Pet Porpoise Pool

- ‘I enjoyed a wonderful dolphin experience at the Pet Porpoise Pool and enjoyed the dolphin and seal show.’ (45-54 years, repeat visitor)

- ‘The Pet Porpoise Pool is a major attraction for anyone interested in rescued animals and interacting with them. The Pool needs to be supported and encouraged to develop into its future plans in order to continue educating the public about animals and caring for the environment.’ (45-54 years, repeat visitor)

- ‘The Pet Porpoise Pool (sorry for the spelling) it was great and I have been singing its praises since my visit. I can't believe I grew up on the North Coast and have never visited before!’ (45-54 years, repeat visitor)

- ‘The Pet Porpoise pool was a fantastic experience for the whole family. I would absolutely recommend it to friends and family.’ (35-44 years, repeat visitor)

- ‘I went to Coffs harbour specifically to take my children to the Pet Porpoise Pool. This was an excellent attraction and reasonably good value. We were only in Coffs Harbour for approx 3 hours. (45-54 years, first time visitor)

“What else about the Coffs Coast region were you particularly happy with on your recent visit?”
Visitors were unhappy with value for money

- ‘About the only thing I am not happy about is the huge increase in accommodation costs over the Christmas holiday period and lack of flexibility in number of days available when booking.’ (55-64 years, repeat visitor)

- ‘Quite built up - Summer Holidays, so I guess everyone hiked up the prices for food, drinks, entertainment. Value for money was poor, which was disappointing. This was my first visit in 15 years, and I was disappointed.’ (35-44 years, repeat visitor)

- ‘Everything seems tired, run down. Not well signed. Over priced attractions. Operators more interested in generating a profit than providing service.’ (35-44 years, repeat visitor)

- ‘There has been 10-30% increase in prices but no significant upgrades of the facilities of the caravan park- we need to see improvements if the tariffs increase!’ (35-44 years, repeat visitor)
Visitors were unhappy with the roads

- ‘Main highway through Coffs was extremely busy.’ (45-54 years, repeat visitor)
- ‘Unfortunately the roads required some works leading into Bellingen from the Waterfall Way.’ (45-54 years, repeat visitor)
- ‘Congestion on the Pacific Highway through Coffs and the traffic danger of entering and leaving the Big Banana.’ (45-54 years, repeat visitor)
- ‘The bridge connecting Valla Reserve to the Beach needs maintenance. Some pylons appear to be in a state of disrepair. I'm not sure who is responsible for the upkeep of the bridge but it would be a shame if it's neglected. It is used by many holiday makers who stay at Valla Beach Tourist Park.’ (45-54 years, repeat visitor)
- ‘The highway between Hat Head and Urunga is very dangerous.’ (55-64 years, repeat visitor)
- ‘The Waterfall Way Road was very cut up but this is due to the rain which was understandable but hopefully can be repaired as soon as possible.’ (55-64 years, repeat visitor)
Half of visitors recommended the Coffs Coast

This proportion was less than both the subgroup and all destination benchmarks.

“How likely are you to recommend the Coffs Coast region to other people as a destination to visit?”
Visitors were more likely to return in the next 12 months compared with the benchmarks

<table>
<thead>
<tr>
<th>Likelihood to Return</th>
<th>Total Likely</th>
<th>V Likely</th>
<th>V Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>... in 12 months</td>
<td>68%</td>
<td>48%</td>
<td>9%</td>
</tr>
<tr>
<td>Difference to subgroup</td>
<td>4%</td>
<td>11%</td>
<td>-3%</td>
</tr>
<tr>
<td>Difference to all</td>
<td>13%</td>
<td>17%</td>
<td>-8%</td>
</tr>
</tbody>
</table>

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

Base = 207
Summary

- Just under half (48%) of visitors were very satisfied with their visit to the Coffs Coast. This was less than both the subgroup and all destination benchmarks.

- The proportion of visitors very satisfied with their visit to the Coffs Coast differed by different visitor segments. Friends and relatives travelling together (68% very satisfied), first time visitors (58%), older singles/couples (57%), those who stayed in commercial caravan or camping (57%) and visitors to Bellingen/Dorrigo (55%) were more satisfied than other visitors.

- In contrast those who stayed in hotels/motels (36%), younger/midlife singles/couples (38%), those who visited Coffs Harbour (and not Bellingen/Dorrigo) (42%) and those who travelled with their immediate family (44%) were less satisfied than other visitors.

- Something the kids would enjoy was an experience that was expected (54% expected this experience) and visitors rated it as better than expected (59% rated it as better than expected) compared with the benchmark.

- Relaxation and rejuvenation was an experience expected by first time visitors and rated as better than expected compared with the benchmark.
Summary

- Friendly service and personal safety and security were attributes most important to visitors with 39% of visitors rating each attribute as very important.

- Friendly service, personal safety and security, local atmosphere, friendliness of locals and the variety of things to see and do were the main drivers of overall satisfaction.

- Shopping was an attribute that was both very important (12%) to visitors and visitors were very satisfied (34%) with compared with the benchmark.

- Visitors to Bellingen/Dorrigo were more satisfied with the food and beverage and local atmosphere than visitors to the region in general.

- VFR visitors were more satisfied with the shopping, tours and friendliness of the locals than visitors to the region in general.

- Visitors were less satisfied across all accommodation types compared with the benchmarks for each type.
Appendix
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
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

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Total Sat</th>
<th>V Sat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Satisfaction</td>
<td>92%</td>
<td>58%</td>
</tr>
<tr>
<td>Difference to subgroup</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>Difference to all</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>
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

This destination has a smaller proportion very satisfied with the destination than both the subgroup and all destinations
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.