

Byron Shire Visitor Profile and Satisfaction Survey

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



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Presentation outline

- Background
- Visitor and trip characteristics
- Why they visited the region and were they happy
- Recommendations



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Background



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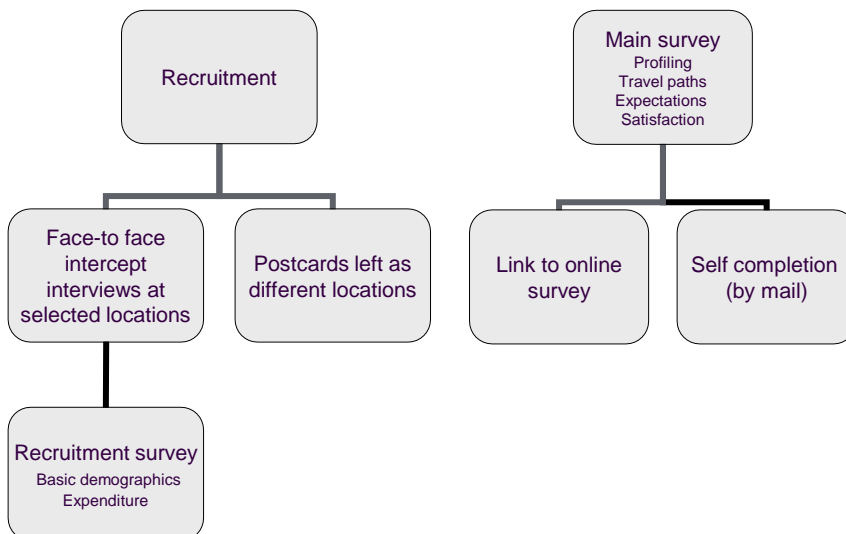
Byron Shire VPS project

- The Byron Shire Visitor Profile and Satisfaction (VPS) project is part of the TRA Destination Visitor Survey Program
- Objectives of the project were to provide information on:
 - Visitor profile.
 - Why visitors chose to visit the region.
 - Expectations of the region.
 - What visitors did here.
 - Were they happy with their visit?

Byron Shire VPS project

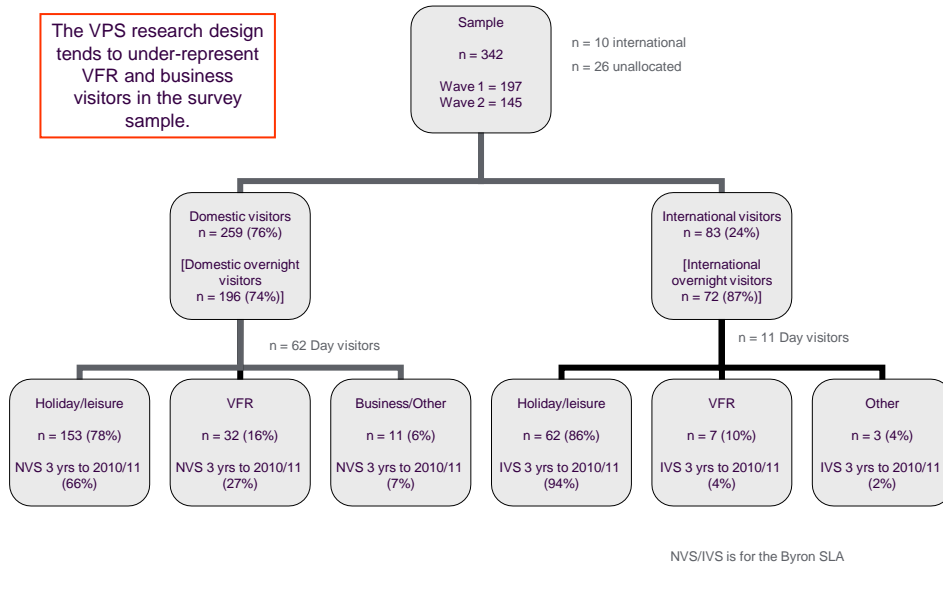
- Recruitment during April, May and June 2011.
- Two waves:
 - Wave 1: Face to face recruitment Mid April during the New South Wales and Queensland school holidays
 - Wave 2: Face to face recruitment Early June
- Snapshots of certain times of the year

Data collection



Survey sample

The VPS research design tends to under-represent VFR and business visitors in the survey sample.



VPS Benchmarks

- 76 VPS projects have been completed in Australian regional tourist destinations - VPS Benchmark Database.
- Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents.

VPS Benchmarks

- Data are also compared with a 'subgroup' of destinations. The 'subgroup' includes:
 - Batemans Bay
 - Daylesford Macedon Ranges
 - Kingscliff/Cabarita
 - Noosa
 - Port Douglas

Visitor and trip characteristics



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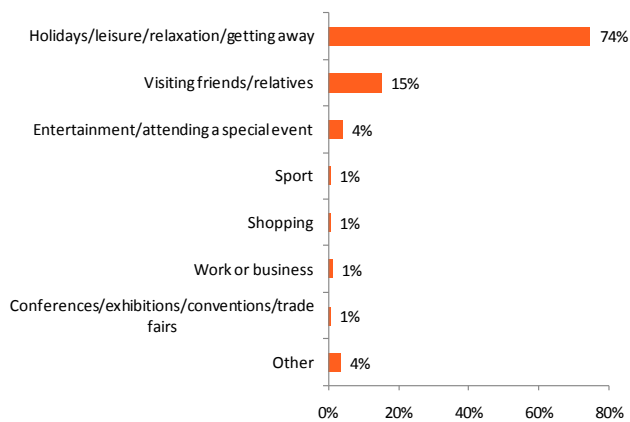
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Visitor profile (during the survey period)

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



Eight in ten visitors were in the region for holiday/leisure purposes

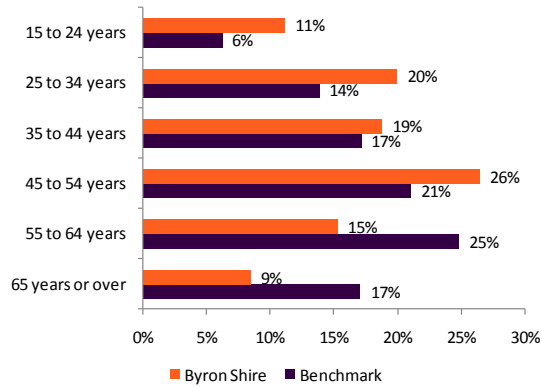


| Purpose | Byron | Subgroup | All |
|--------------------------------|-------|----------|-----|
| Holiday | 80% | -5% | 3% |
| Visiting friends and relatives | 15% | 5% | 2% |
| Business | 2% | -1% | -3% |
| Other | 4% | 0% | -2% |

Base = 341

'What was the main purpose of the trip?'

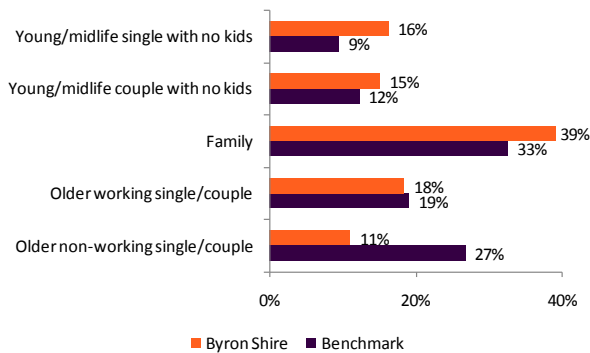
Three quarters of visitors were less than 54 years



Base = 341

"What is your age?"

The highest proportion of visitors was in the family life stage

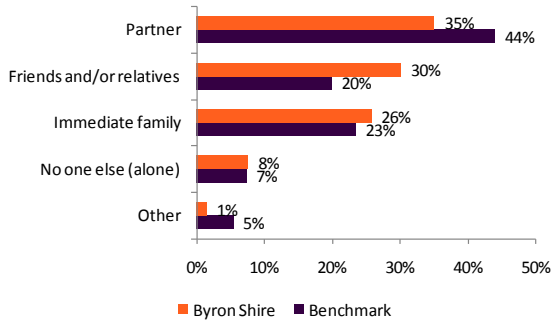


Base = 271

| Life Stage | Byron | Subgroup | All |
|----------------------|-------|----------|--------|
| Young/midlife single | 16% | ↑ 8% | ↑ 7% |
| Young/midlife couple | 15% | → 0% | → 3% |
| Family | 39% | ↑ 5% | ↑ 7% |
| Older working | 18% | → -1% | → -1% |
| Older non-working | 11% | ↓ -12% | ↓ -16% |

Derived variable from demographic questions

The highest proportion of visitors travelled as a couple



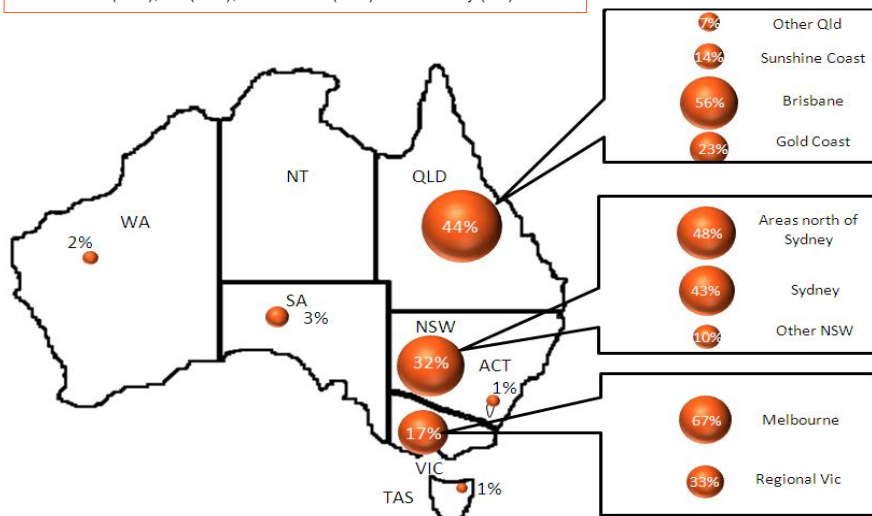
| Travel Party | Byron | Subgroup | All |
|----------------------|-------|----------|-----|
| Alone | 8% | 2% | 0% |
| Couple | 35% | -13% | -9% |
| Family | 26% | 1% | 2% |
| Friends or relatives | 30% | 11% | 10% |
| Other | 1% | -2% | -4% |

Base = 342

"How would you describe your travel party, that is, all persons with whom you directly travelled and shared most expenses? Travelled with ..."

Three quarters of visitors were domestic visitors

• The highest proportion of international visitors were from New Zealand (18%), USA/Canada (16%), UK (16%), Scandinavia (10%) and Germany (9%).



Base = 258

"In which State or Territory do you reside?"
"What is your home postcode?"

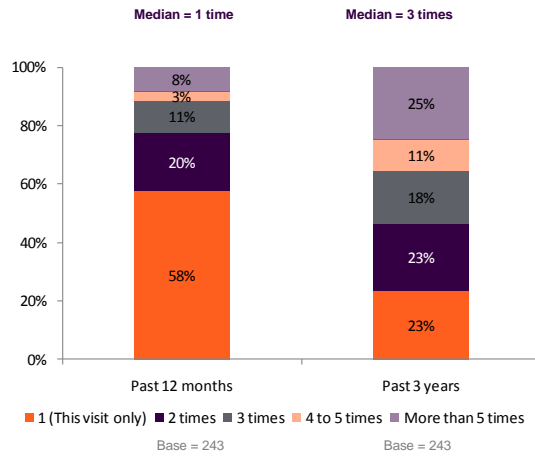
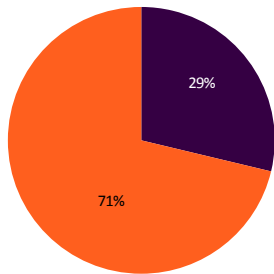
Wave 1 versus Wave 2 visitors

| | Wave 1 (April/May) (58%) | Wave 2 (May/June) (42%) |
|--------------|---|--|
| Purpose | Holiday/leisure 79% VFR 16% (n = 196) | Holiday/leisure 81% VFR 13% (n = 145) |
| Life stage | Family 42% Young/midlife singles/couples 33% Older working/non working 25% (n = 193) | Family 32% Young/midlife singles/couples 27% Older working/non working 41% (n = 78) |
| Travel party | Friends and/or relatives 32% Immediate family 29% Partner 28% (n = 197) | Friends and/or relatives 27% Immediate family 21% Partner 45% (n = 145) |
| Origin | Domestic 75% (n = 197) Intrastate 34% (n = 146) | Domestic 77% (n = 145) Intrastate 29% (n = 112) |

Trip planning and booking

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

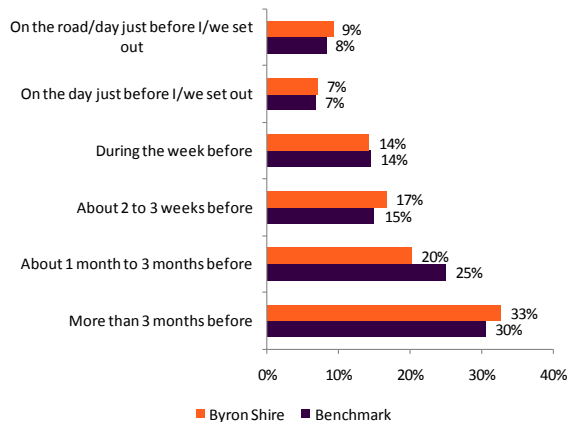
Seven in ten visitors were repeat visitors



"Was this the first time you had visited the Byron Shire including both day trips and overnight trips?"

"How many times have you visited the Byron Shire, including both day trips and overnight trips?"

More than half of visitors planned more than one month in advance

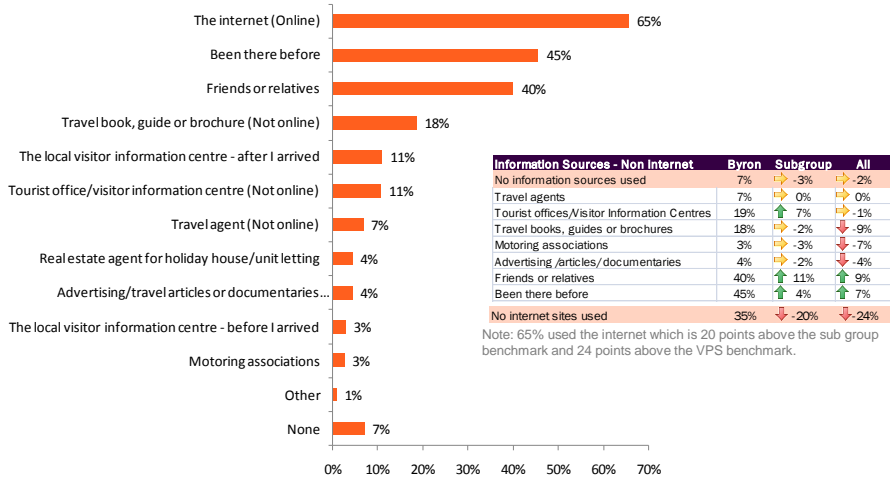


| Trip Planning | Byron | Subgroup | All |
|---------------------|-------|----------|-----|
| On the road | 9% | 3% | 1% |
| In the month before | 38% | 0% | 2% |
| 1 to 3 months | 20% | -4% | -5% |
| More than 3 months | 33% | 1% | 2% |

Base = 337

"When was the decision made to visit the Byron Shire?"

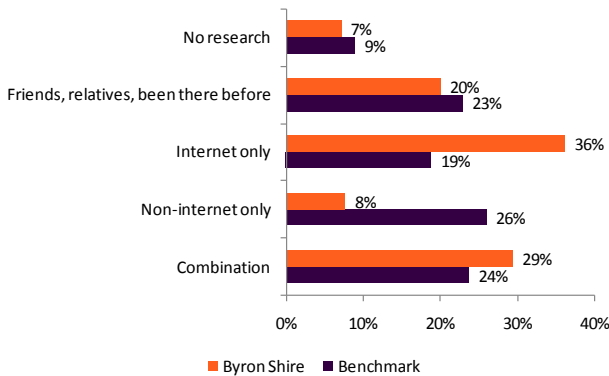
About two thirds of visitors used the internet for information



Base = 341

'Which of the following did you use to obtain information for this trip to the Byron Shire?'

Nearly four in ten visitors only used the internet for information

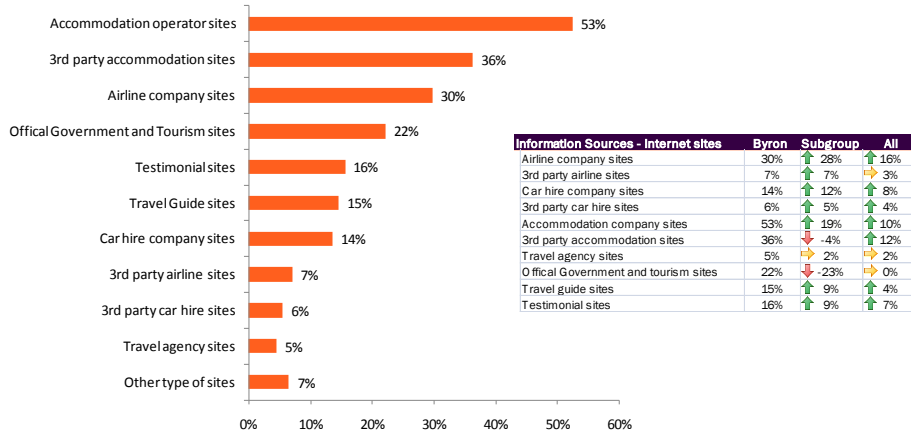


Note: 'Friends, relatives, been there before' may be used in combination with other categories (excludes 'No research')

Base = 341

Derived variable

More than half of visitors who used the internet for information used accommodation operator sites



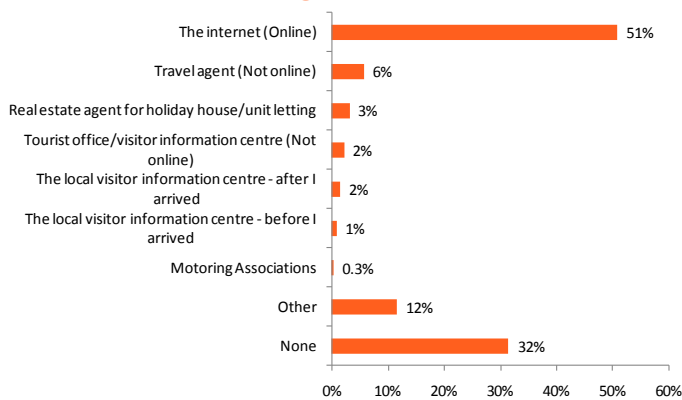
| Information Sources - Internet sites | Byron | Subgroup | All |
|---------------------------------------|-------|----------|-------|
| Airline company sites | 30% | ↑ 28% | ↑ 16% |
| 3rd party airline sites | 7% | ↑ 7% | ↓ 3% |
| Car hire company sites | 14% | ↑ 12% | ↑ 8% |
| 3rd party car hire sites | 6% | ↑ 5% | ↑ 4% |
| Accommodation company sites | 53% | ↑ 19% | ↑ 10% |
| 3rd party accommodation sites | 36% | ↓ -4% | ↑ 12% |
| Travel agency sites | 5% | ↓ 2% | ↓ 2% |
| Official Government and tourism sites | 22% | ↓ -23% | ↓ 0% |
| Travel guide sites | 15% | ↑ 9% | ↑ 4% |
| Testimonial sites | 16% | ↑ 9% | ↑ 7% |

Other sites included search engines like Google and Google maps.

Base = 198

"You mentioned that you used the internet for research. What are the type of websites you went to?"

About half of visitors made bookings through the internet



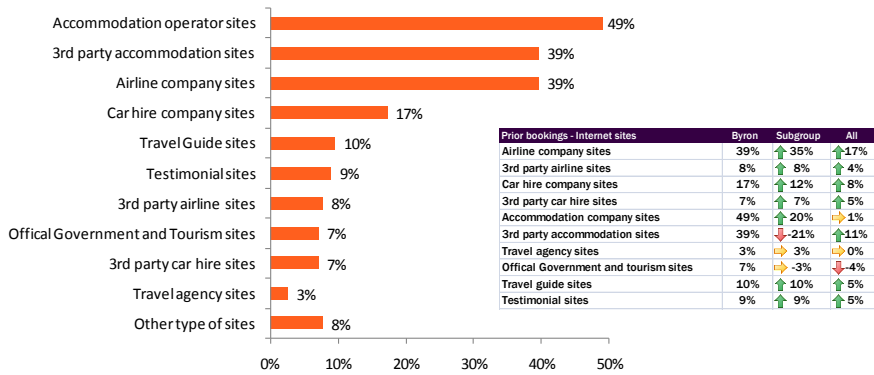
| Prior Bookings - Non Internet | Byron | Subgroup | All |
|---|------------|-------------|--------------|
| No prior bookings made | 32% | ↑ 4% | ↓ -5% |
| Travel Agents | 6% | ↓ -2% | ↓ -5% |
| Tourist offices/Visitor Information Centres | 4% | ↑ 1% | ↓ -1% |
| Motoring associations | 0% | ↓ -1% | ↓ -2% |
| No prior bookings made on internet | 49% | ↑ 1% | ↓ -5% |

Note: 51% used the internet for bookings which is 1 point above the sub group benchmark and 5 points above the VPS benchmark.

Base = 311

"Which of the following did you use to make bookings for this trip to the Byron Shire?"

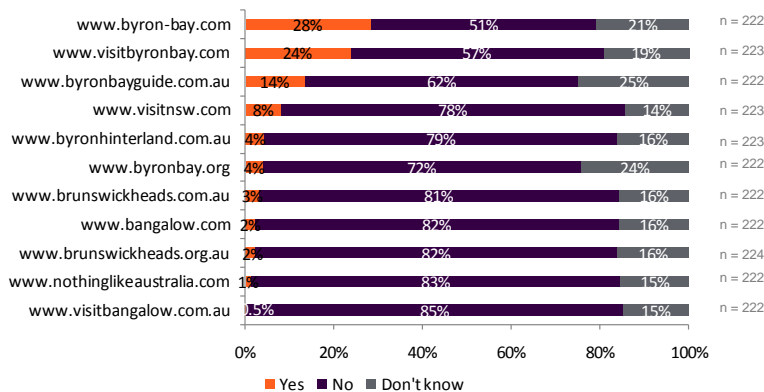
Accommodation operator sites were the most common sites used for bookings



Base = 157

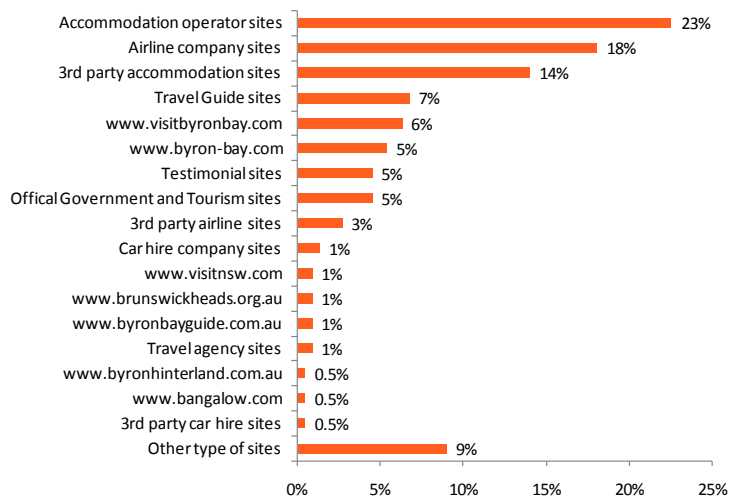
*You mentioned that you used the internet for booking. What are the type of websites you went to?

www.byron-bay.com was the most popular specific website used



*Did you use any of the following specific websites prior to your trip to the Byron Shire?

Accommodation operator sites were most useful



Base = 222

"Of the websites you used prior to your trip to the Byron Shire, which did you find most useful?"

Wave 1 versus Wave 2 visitors

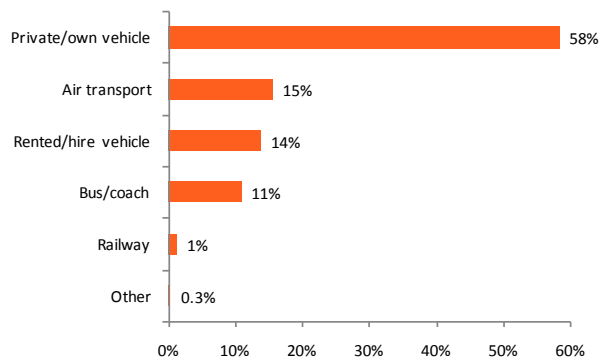
| | Wave 1 (April/May) (58%) | Wave 2 (May/June) (42%) |
|---------------------|--|--|
| Repeat visitor | 69% (n = 196) | 74% (n = 145) |
| Trip planning | More than 3 months before 37% 1-3 months before 23% 2-3 weeks before 14% (n = 196) | More than 3 months before 26% 1-3 months before 16% 2-3 weeks before 21% (n = 141) |
| Information sources | Internet only 38% Internet and non-internet sources 30% Friends, relatives, been there before 20% (n = 196) | Internet only 34% Internet and non-internet sources 29% Friends, relatives, been there before 20% (n = 145) |
| Booking sources | Internet 53% No bookings made 27% (n = 180) | Internet 47% No bookings made 38% (n = 131) |

Getting to and around the Byron Shire

- Transport used
- Routes taken in and out
- Locations visited



Seven in ten visitors were self drive



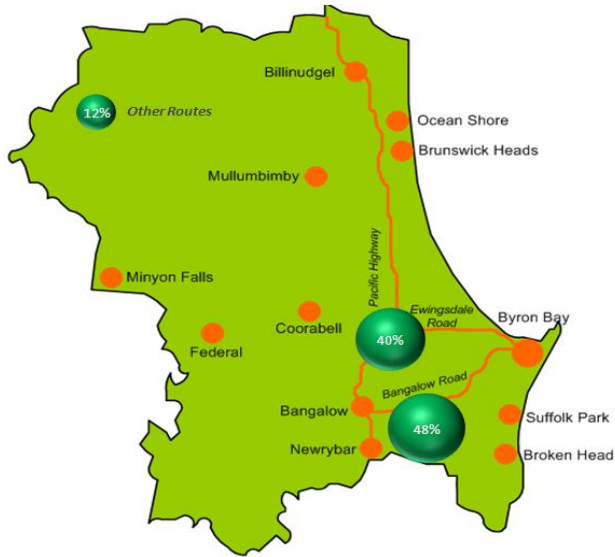
Other Characteristics

| | | | |
|------------|-----|-------|-------|
| Self drive | 72% | ↓ -8% | ↓ -7% |
| Air travel | 15% | ↔ 3% | ↔ 2% |

Base = 342

"What was the main form of transport that you used to get to the Byron Shire?"

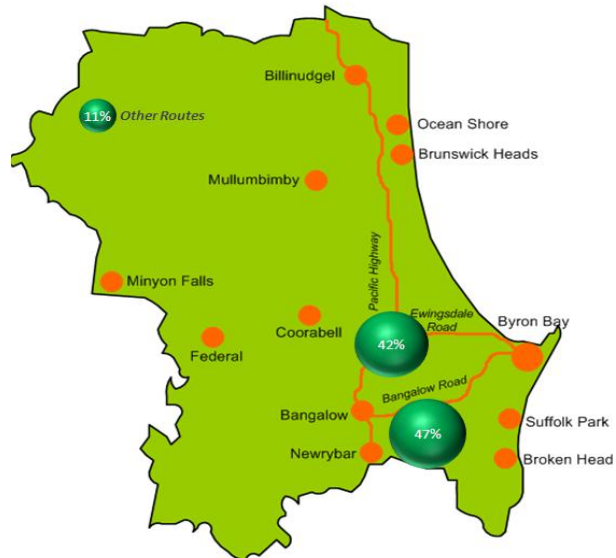
Routes used to get to the Byron Shire



Base = 179

"Which route did you mainly travel to get to the Byron Shire?"

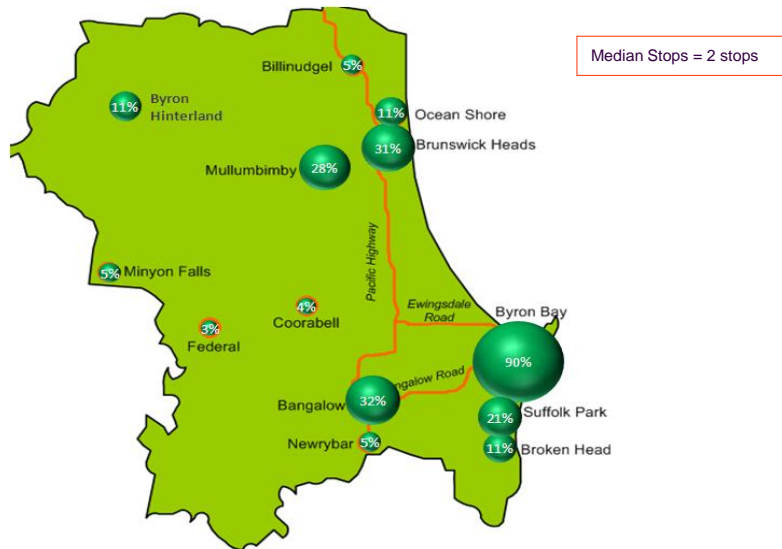
Routes used to leave the Byron Shire



Base = 187

"Which route did you mainly travel to leave the Byron Shire?"

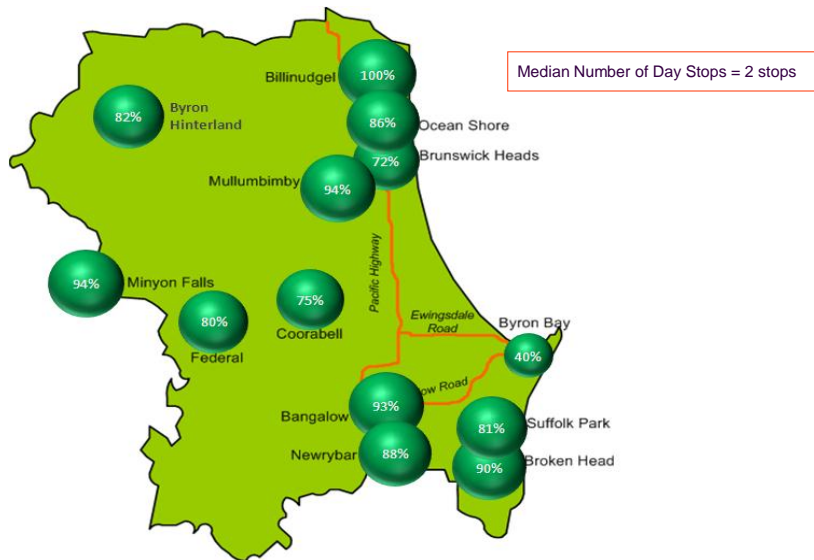
Towns visited during trip – towns stopped at



Base = 341

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

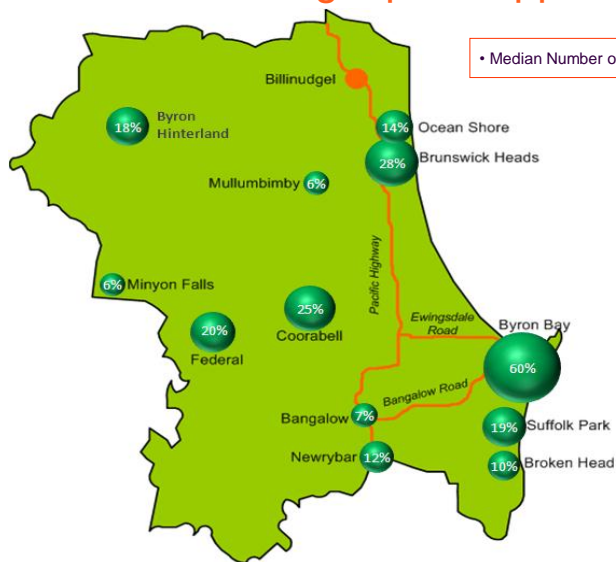
Towns visited during trip – day visit



Percentages are expressed as the percentage of all visits (day and overnight) to each town.
Bases: *Small base.

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

Towns visited during trip – stopped overnight



• Median Number of Overnight Stops = 1 stop

Percentages are expressed as the percentage of all visits (day and overnight) to each town.
Bases: *Small base.

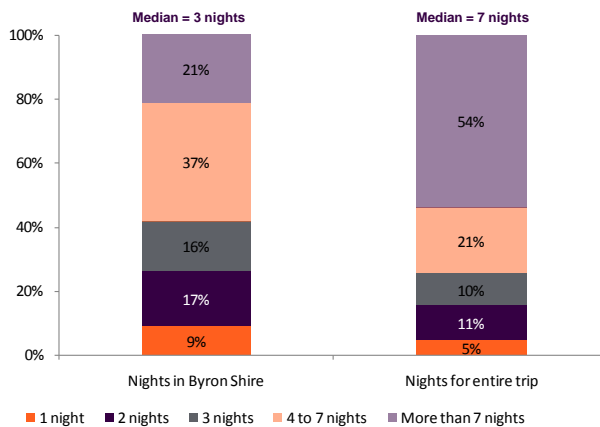
"On this trip which, if any, of the following towns did you visit?"

Staying in the Byron Shire

- Length of stay
- Accommodation used

Eight in ten visitors stayed in the region overnight

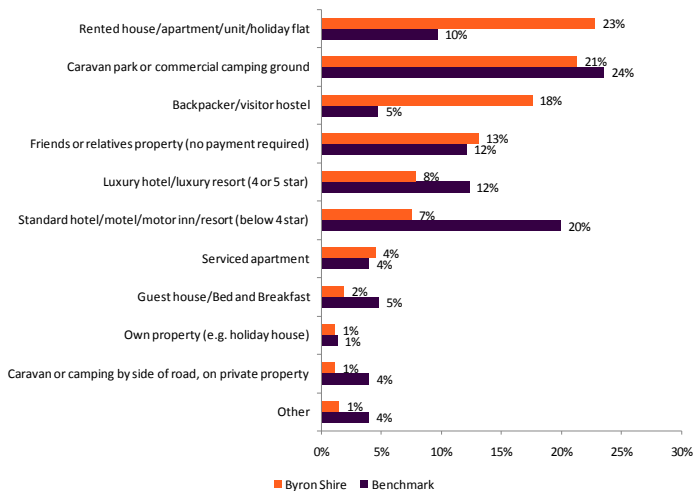
| Length of Stay | Byron | Subgroup | All |
|----------------|-------|----------|-------|
| Day Trip | 21% | ↑ 6% | ↓ -6% |
| Overnight | 79% | ↓ -6% | ↑ 6% |



Base = 268
 "How many nights did you stay in the Byron Shire during this trip?"

Base = 292
 "In total, how many nights did you stay away from home for your entire trip?"

The highest proportions of visitors stayed in a rented house/apartment or a commercial caravan or camping ground



Base = 268

"What type of accommodation did you mainly use in the Byron Shire?"

Wave 1 versus Wave 2 visitors

| | Wave 1 (April/May) (58%) | Wave 2 (May/June) (42%) |
|--------------------|---|--|
| Transport used | Self drive 71% Air transport 16% Bus/coach 12% (n = 197) | Self drive 74% Air transport 15% Bus/coach 9% (n = 145) |
| Length of stay | Overnight visitor 86% Median = 4 nights Mean = 6 nights (n = 196) | Overnight visitor 68% Median = 2 nights Mean = 4 nights (n = 145) |
| Accommodation used | Rented house/apartment 24% Commercial caravan park 24% Backpackers 18% (n = 169) | Rented house/apartment 21% Commercial caravan park 16% Backpackers 16% (n = 99) |

Summary: Visitor and trip characteristics

- Holiday leisure and VFR visitors
- Domestic and international visitors
- Domestic - family or older life stages and repeat visitors
- International - young/midlife life stages and first time visitors
- Domestic - Qld (Brisbane/Gold Coast) and NSW (Sydney north)
-

Summary: Visitor and trip characteristics

- Planned more than a month in advance
- The internet, previous experience and friends and/or relatives used for information
- More than half booked through the internet
- Bookings through internet - Accommodation and airline sites
- Domestic - mainly self drive and stayed in rented house/apartment or a commercial caravan or camping ground
- International - self/drive or bus/coach and stayed in backpackers and commercial caravan and camping grounds



Differences between Wave 1 and Wave 2

- In April/May 2011:
 - Higher proportion of visitors in the family life stage travelling in a group
 - Higher proportion of overnight visitors
 - Higher proportion booked in advance
 - The median stay was 4 nights
- In May/June 2011:
 - Higher proportion of visitors in older working/non working life stage travelling with their partner
 - Higher proportion of day visitors
 - Higher proportion made no bookings
 - The median stay was 2 nights



Why they visited the Byron Shire and were they happy



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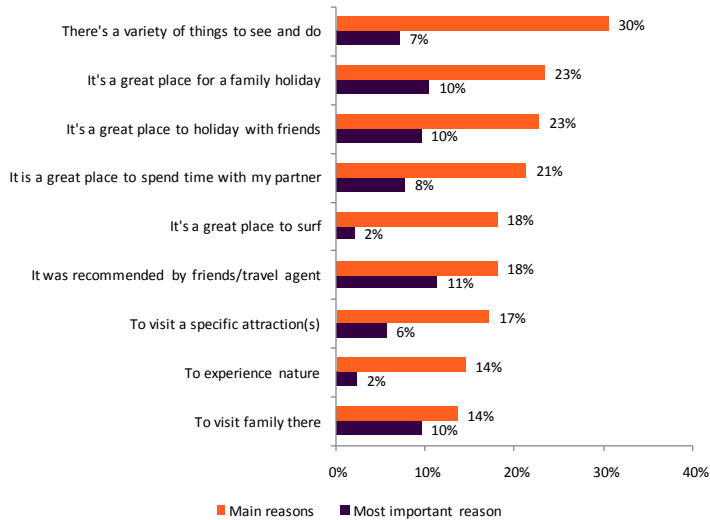
Reasons for visiting the Byron Shire

- Reasons for choosing destination
- Expectations of experiences
- Importance of destination attributes



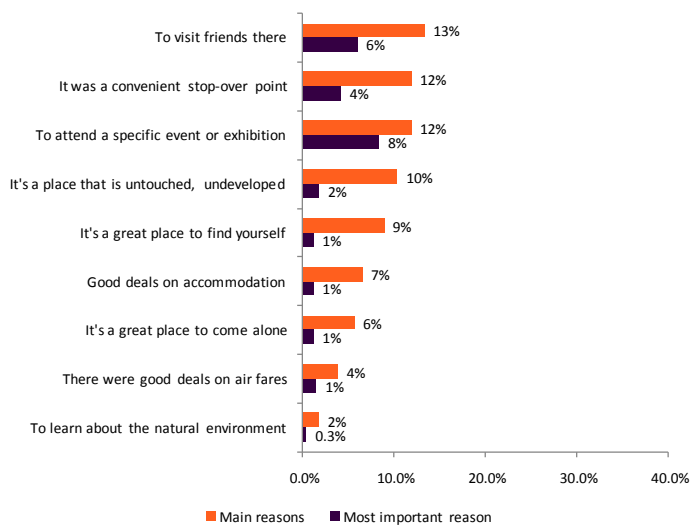
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The variety of things to see and do and spending time with others were the main reasons for visiting Byron Shire



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Bases: All respondents Main Reason = 338
All respondents Most important = 335

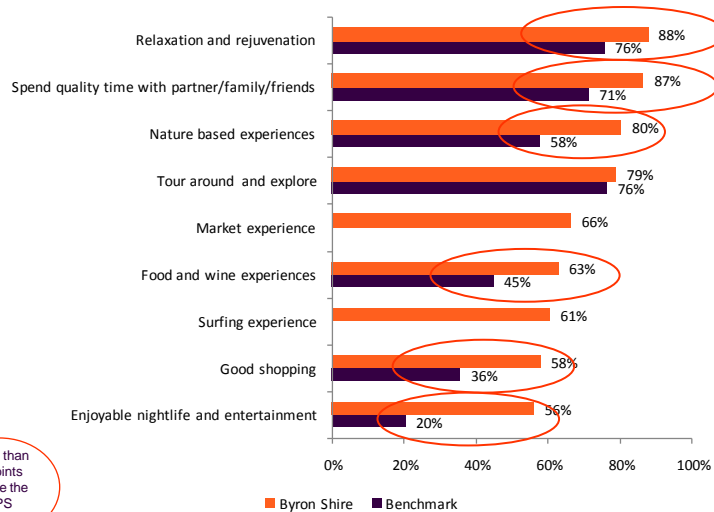
"Why did you chose the Byron Shire?"
"Which of the following was most important in choosing the Byron Shire?"

Reasons for visiting for Wave 1 versus Wave 2 visitors

| | Wave 1 (April/May) (More than 3 points above Overnight visitor) | Wave 2 (May/June) (More than 3 points above Day visitor) | No difference (Within +/- 3 points) |
|-----------------------------|---|---|---|
| Reasons for visiting | <ul style="list-style-type: none"> • It's a great place for a family holiday* • It's a great place to surf* • It was recommended • To attend a specific/major event | <ul style="list-style-type: none"> • Variety of things to see and do • It's a great place to spend time with my partner • To visit specific attractions* • To experience nature | <ul style="list-style-type: none"> • It's a great place to holiday with friends • To visit family there • To visit friends there • It was a convenient stopover • It's a place that is untouched, undeveloped • It's a great place to find yourself • Good deals on accommodation • It's a great place to come alone • There were good deals on airfares • To learn about the natural environment |

* Significant difference at the 95% confidence level

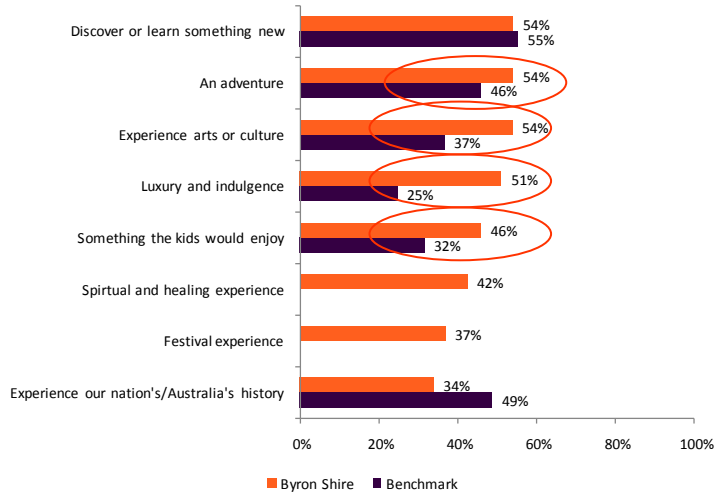
Expectations for a number of experiences were above the benchmarks



More than 3 points above the VPS benchmark

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Base = 342

"Which, if any, of the experiences listed below did you expect Byron Shire to offer?"

Expectations of Wave 1 versus Wave 2 visitors

| | Wave 1 (April/May) (More than 3 points above Wave 2 visitor) | Wave 2 (May/June) (More than 3 points above Wave 1 visitor) | No difference (Within +/- 3 points) |
|---------------------|--|---|--|
| Expectations | <ul style="list-style-type: none"> Surfing experience Something the kids would enjoy | <ul style="list-style-type: none"> Spend quality time with others To tour around and explore Market experience* Food and wine experiences Good shopping To discover or learn something new To experience arts or culture Luxury and indulgence Spiritual and healing experience Festival experience To experience our nation's history | <ul style="list-style-type: none"> Relaxation and rejuvenation Nature based experiences Enjoyable entertainment and nightlife An adventure |

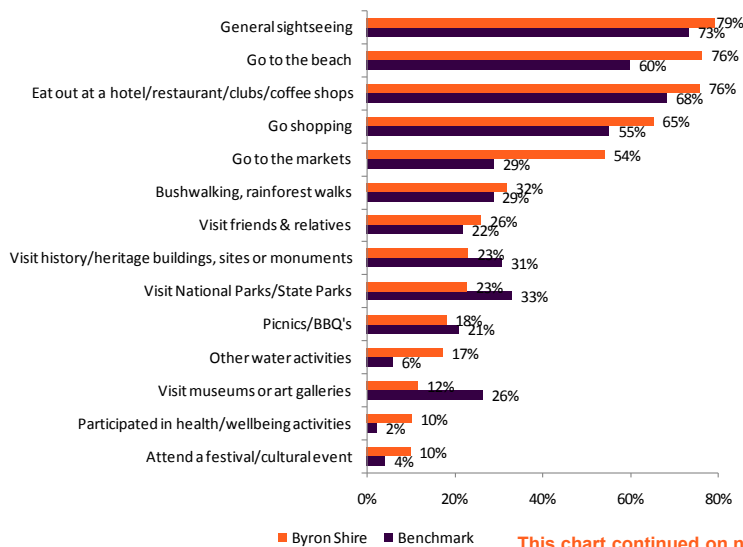
* Significant difference at the 95% confidence level

What did they do in the Byron Shire?

- Activities
- Attractions

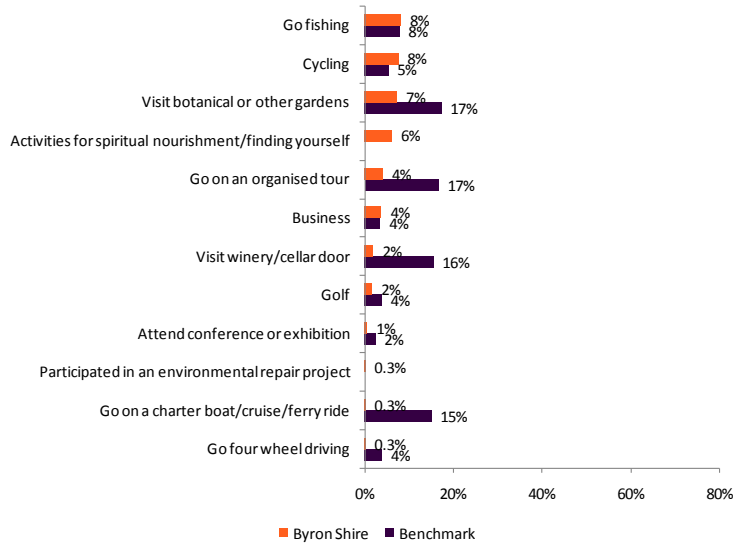


Sightseeing, going to the beach, eating out, shopping and the markets were the most common activities in the region



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Base = 342

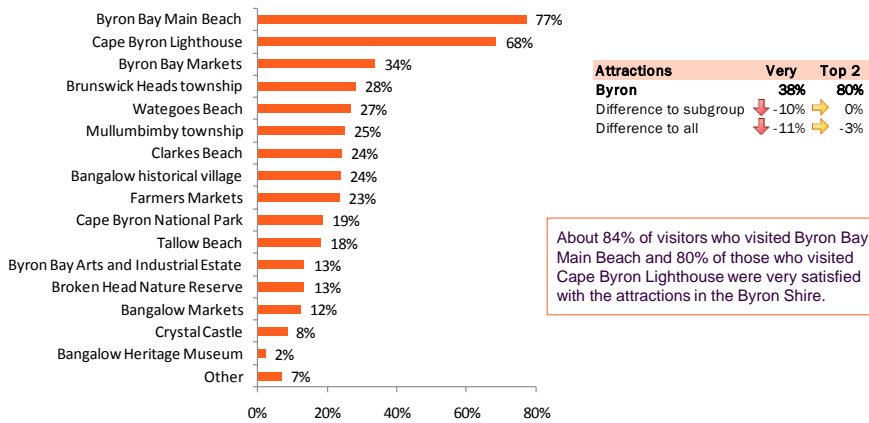
"On this trip to the Byron Shire, which of the following activities did you undertake?"

Activities for Wave 1 versus Wave 2 visitors

| | Wave 1 (April/May) (More than 3 points above Wave 2 visitors) | Wave 2 (May/June) (More than 3 points above Wave 1 visitors) | No difference (Within +/- 3 points) |
|-------------------|---|---|---|
| Activities | <ul style="list-style-type: none"> • General sightseeing • Go to the beach • Eating out • Go shopping • Visit a national or state park • Picnics or BBQs • Other water activities • Visit museums or galleries* • Attend a festival or cultural event • Go fishing* | <ul style="list-style-type: none"> • Go to the markets • Visit history or heritage buildings • Participating in health or well being | <ul style="list-style-type: none"> • Bushwalking • Visit friends or relatives • Cycling • Visit botanical gardens • Activities for spiritual nourishment/finding yourself • Go on an organised tour • Business • Visit winery or cellar door • Golf • Attend a conference • Participate in an environmental repair project • Go on a charter/skippered boat • Four wheel driving |

* Significant difference at the 95% confidence level

Byron Bay Main Beach and Cape Byron Lighthouse were the most visited attractions



Base = 342

"Please select all the attractions that you visited in the Byron Shire, only selecting those attractions that you actually stopped at."

Attractions for Wave 1 versus Wave 2 visitors

| | Wave 1 (April/May) (More than 3 points above Wave 2 visitors) | Wave 2 (May/June) (More than 3 points above Wave 1 visitors) | No difference (Within +/- 3 points) |
|--------------------|---|---|--|
| Attractions | <ul style="list-style-type: none"> • Brunswick Heads township • Wategoes Beach • Clarkes Beach* • Farmers Markets • Tallow Beach • Crystal Castle | <ul style="list-style-type: none"> • Cape Byron Lighthouse • Byron Bay Markets* • Bangalow historic township • Bangalow Heritage Museum | <ul style="list-style-type: none"> • Byron Bay Main Beach • Mullumbimby township • Cape Byron National Park • Byron Bay Arts and Industrial Estate • Broken Head Nature Reserve • Bangalow Markets |

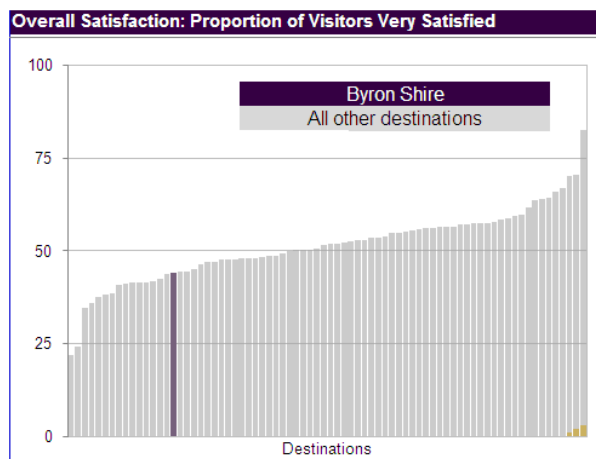
* Significant difference at the 95% confidence level

Visitor satisfaction in the Byron Shire

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

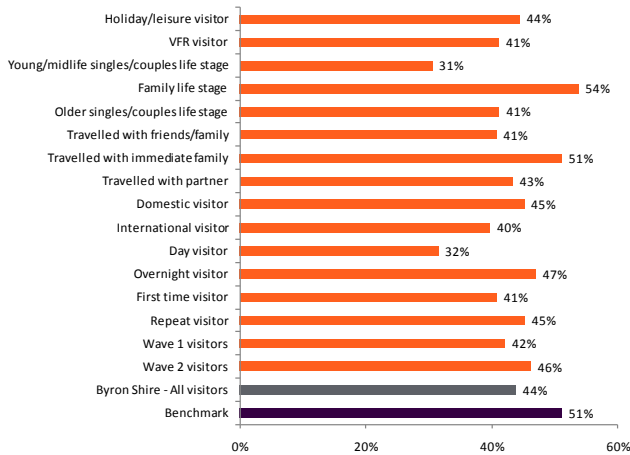


A smaller proportion of visitors were very satisfied compared with the benchmarks

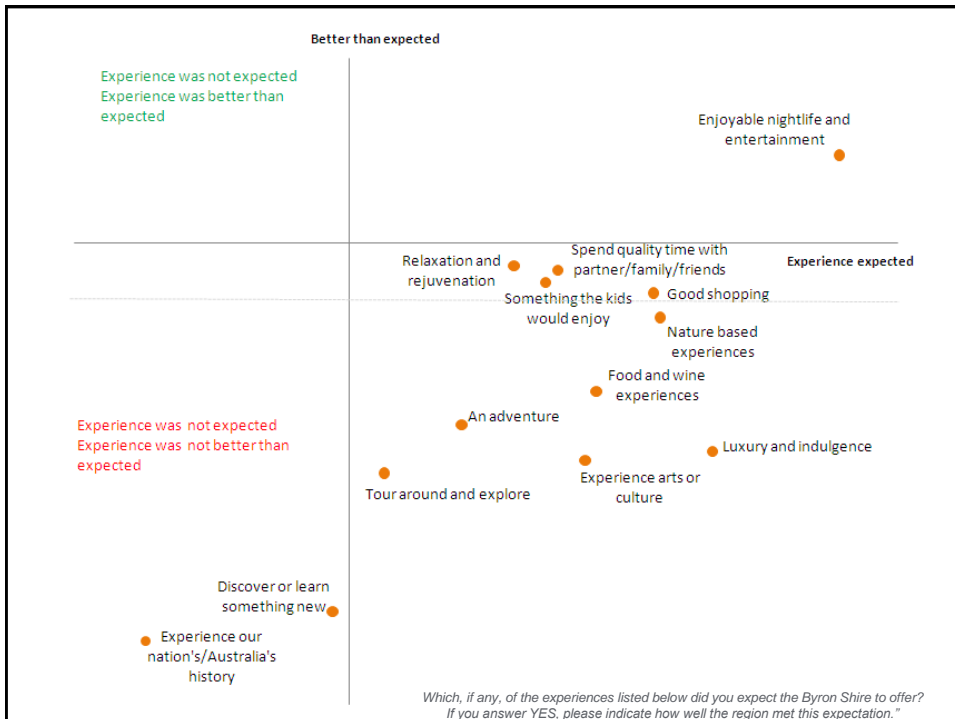


| Key Metrics | Total Sat | V Sat | Total Dis |
|-----------------------------|------------|------------|-----------|
| Overall Satisfaction | 87% | 44% | 8% |
| Difference to subgroup | ↓ -4% | ↓ -13% | ↔ 1% |
| Difference to all | ↔ 1% | ↓ -7% | ↔ -2% |

Visitors in the family life stage and those travelling with their immediate families were more satisfied than other visitors

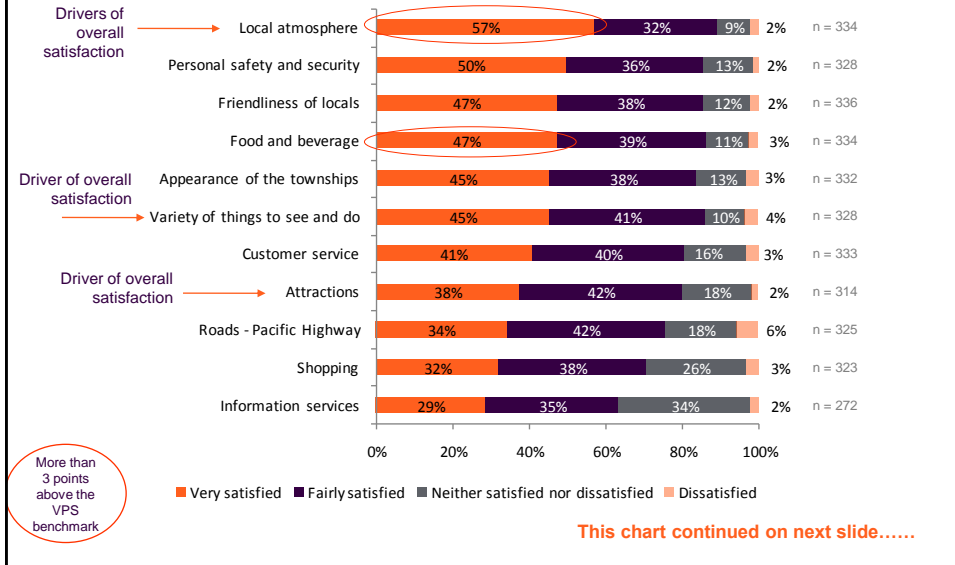


"Overall, how satisfied or dissatisfied were you with your experience at the Byron Shire?"

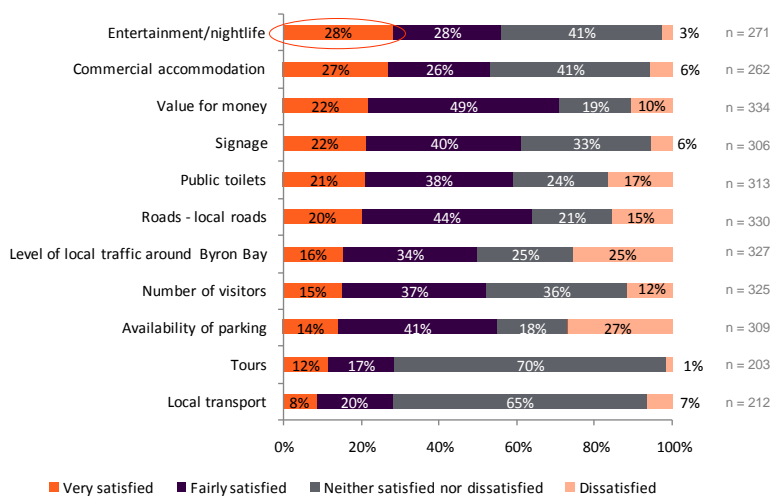


Which, if any, of the experiences listed below did you expect the Byron Shire to offer? If you answer YES, please indicate how well the region met this expectation.

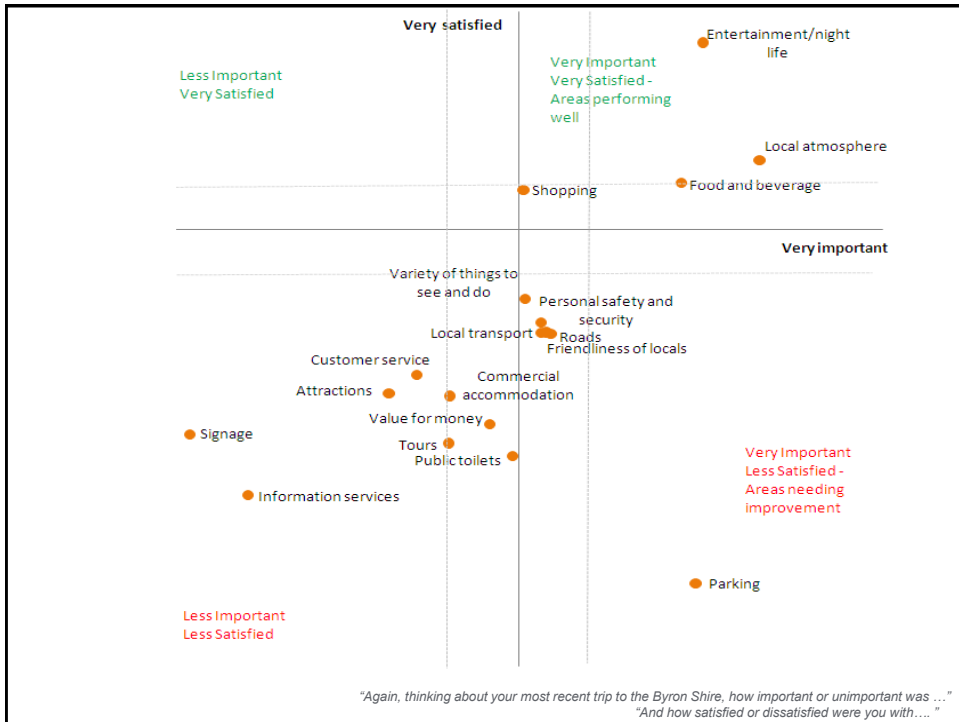
Satisfaction with food and beverage was above the VPS benchmark



..... continued from previous slide



"And how satisfied or dissatisfied were you with...."



Visitors were happy with ...

- The local people and relaxed atmosphere
- Beaches
- Food
- Scenery and natural environment
- Clean and safe environment
- Shopping and markets
- Paths and walkways e.g. around the Lighthouse

"What else about the Byron Shire were you particularly happy with on your recent visit?"

Visitors were happy with the local atmosphere and beaches

“Beautiful town, beautiful beaches, clean and safe, lovely accommodation, great shopping, great for teenagers and young adults also great for older people. Very relaxing, great weather!!” (45-54 years, Repeat Visitor)

“I loved the Cape Byron Lighthouse and nearby walks. The beach was beautiful and the Volunteer in the lighthouse museum was very informative.” (45-54 years, First time visitor)

“The local markets, relaxed atmosphere, beaches and coastal walk” (15-24 years, First time visitor)

“We enjoyed the relaxing atmosphere and being by the beach. When shopping, customer service was great. We took drives to enjoy the landscape and when doing this we discovered parts of the Byron Shire we would like to see more of.” (35-44 years, Repeat visitor)

“What else about the Byron Shire were you particularly happy with on your recent visit?”

Visitors were happy with the local atmosphere and beaches

“As a large family of six it's a great opportunity to spend quality time together, eating out, shopping, visiting lighthouse and spending time on the beach. Lots to do for the younger kids and teenagers, felt safe and loved the atmosphere, very friendly people with relaxed outlook.” (35-44 years, Repeat visitor)

“The busking on the streets was great to hear as there is a lot of talent in this town.” (25-34 years, First time visitor)

“The fairly undeveloped environment and the walking paths were great.” (45-54 years, Repeat visitor)

“The natural beauty, uncrowded beaches, lovely villages and friendly people.” (65+ years, Repeat visitor)

“What else about the Byron Shire were you particularly happy with on your recent visit?”

Visitors were happy with food and the safe and clean environment

"I was extremely happy with the tidiness of the town and I felt safe walking around even at night. The markets added a nice feel to the town and it just showed what a tight knit community Byron has. There is a nice wide range of shops." (15-24 years, First time visitor)

"The cleanliness of the town. There were lots of performances on the street (music etc) that made it interesting walking around town." (25-34 years, First time visitor)

"Food options are always good. The nature and feeling of the town are the reasons I come. Good to see the lighthouse road is getting some attention!" (25-34 years, Repeat visitor)

"What else about the Byron Shire were you particularly happy with on your recent visit?"

Visitors were unhappy with ...

- Traffic and congestion
- Prices
 - Accommodation
 - Parking
- Availability of Parking and Public Toilets
- Quality of Public Toilets, Roads and Accommodation

"What else about the Byron Shire were you particularly unhappy with on your recent visit?"

Visitors were unhappy with the traffic congestion and parking

"The traffic was horrendous and there was no parking anywhere so we did not stop to eat or look around." (55-64 years, First time visitor)

"Traffic was really heavy coming into Byron, and parking was a problem. Too expensive and lack of car parks." (35-44 years, First time visitor)

"Paid parking makes long beach days restricting while swimming around Byron." (15-24 years, Repeat visitor)

"Really unhappy with lack of notice about cost of parking and lack of parking in general." (45-54 years, First time visitor)

"What else about the Byron Shire were you particularly unhappy with on your recent visit?"

Visitors were unhappy with the traffic congestion and parking

"The traffic was pretty thick for a small town. Made crossing the road a bit hazardous. Also the drunks yelling and stumbling down the street over the weekend." (35-44 years, First time visitor)

"The high level of traffic, lack of parking, too many people, high prices of accommodation and too many "wicked" type of campervans everywhere, camping and parking in inappropriate places." (45-54 years, First time visitor)

"The state of the roads - full of potholes and bumps. I have a son in a wheelchair and travelling with him in his van is horrendous! Parking very limited in main towns." (65+ years, Repeat visitor)

"What else about the Byron Shire were you particularly unhappy with on your recent visit?"

Visitors were unhappy with the quality of public toilets

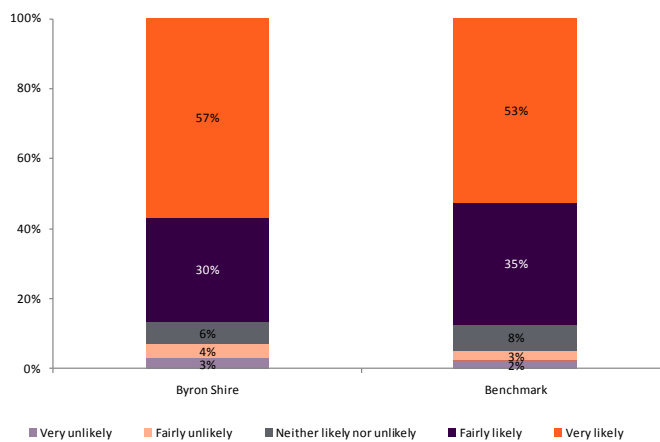
“Public toilets at Main Beach were very dirty - we visited on a Sunday and there were lots of people there. Away from the beach there appeared to be few places/parks with tables to sit and enjoy our lunch purchased from a bakery.” (55-64 years, First time visitor)

➤ “The cleanliness of the public toilets, congested traffic, not enough free parking and accommodation was too expensive.” (25-34 years, First time visitor)

“The public toilets at the main beach were not very adequate. There were no change rooms and not enough stalls and it was grimy. It was hard to locate the public 'outside' showers. There were a lot of visitors because it was close to the Easter holiday.” (55-64 years, First time visitor)

“What else about the Byron Shire were you particularly unhappy with on your recent visit?”

Just under nine in ten visitors were likely to recommend the Byron Shire

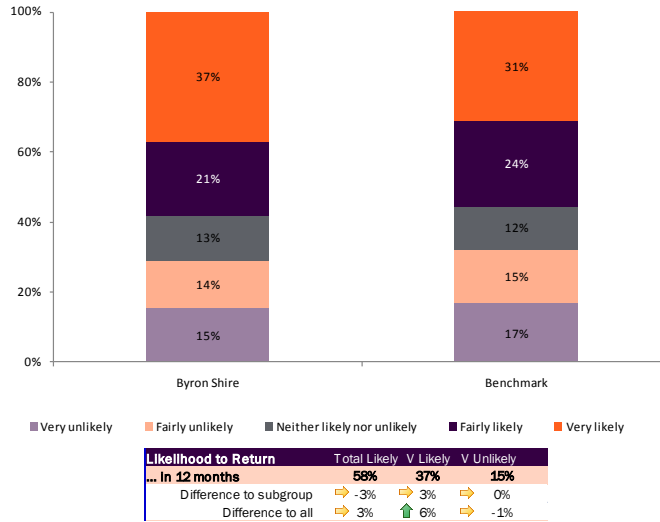


| Key Metrics | Total Likely | V Likely | Total Unlikely |
|------------------------|--------------|------------|----------------|
| Recommend | 87% | 57% | 7% |
| Difference to subgroup | ↓ -4% | ↔ -3% | ↔ 3% |
| Difference to all | ↔ -1% | ↑ 4% | ↔ 2% |

Base = 342

“How likely are you to recommend the Byron Shire to other people as a destination to visit?”

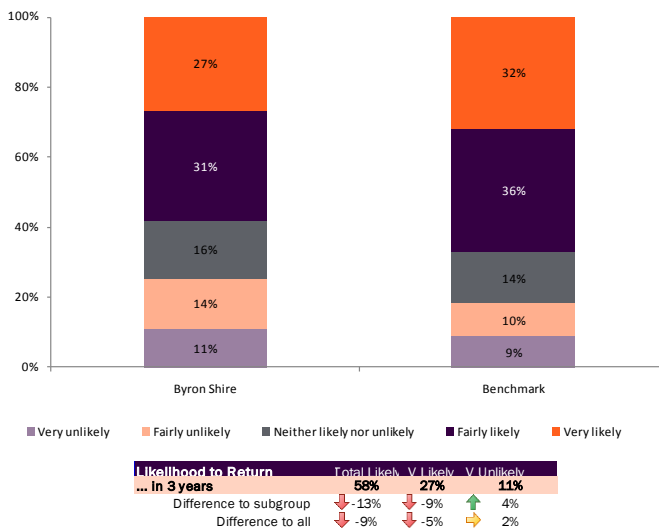
About six in ten visitors were likely to return in 12 months



Base = 342

"How likely are you to return to the Byron Shire in the next 12 months?"

Six in ten visitors visitors were likely to return in the next 3 years



Base = 216

"How likely are you to return to the Byron Shire in the next 3 years?"

Summary: Why they visited and were they happy

- The main reasons why the Byron Shire was chosen were:
 - Variety of things to see and do
 - A great place to spend time with others (family, partner or friends)
- A range of experiences were expected around relaxing and indulging, spending time with others, nature and surfing, markets, food and wine, nightlife/entertainment and arts and culture
- Activities and attractions revolved around these experiences



Summary: Why they visited and were they happy

- Overall satisfaction was relatively low for most visitors except for those travelling with their family or in the family life stage
- Overall satisfaction was driven by local atmosphere, the variety of things to see and do and the attractions
- Satisfaction with local atmosphere, entertainment and nightlife and food and beverage above the benchmarks
-



Summary: Why they visited and were they happy

- Functional attributes where satisfaction was below the benchmarks included attractions, commercial accommodation, customer service, friendliness of the locals, information services, local transport, parking, personal safety and security, public toilets, roads, signage, tours and value for money
- Four attributes with high dissatisfaction – parking, local traffic, public toilets and local roads



Differences between Wave 1 and Wave 2

- In April 2011:
 - More likely to chose the region as it was a great place for a family holiday and to surf
 - 42% were very satisfied
 - Visitors were more dissatisfied with the local traffic in Byron
- In June 2011:
 - More likely to chose the region to visit specific attractions – markets
 - A higher proportion ate out, visited with friends and relatives, went to the markets and visited National Parks
 - 46% very satisfied



Recommendations



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Recommendations

1. Stimulating consumer demand

- Key strength: variety of things to see and do through range of experiences on offer
- Consider this when marketing the region and increasing both first time and repeat visitation.



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Recommendations

2. Product development and diversification

- Range of experiences around nature, food and wine and art and culture (including things for the kids to do – allows visitors relax, indulge and spend time with others
 - Product development should consider these key strengths
- Adapting tourism products and experiences as consumer and travel behaviour continue to change



Recommendations

3. Improving product and service delivery

- Become more proficient at digital marketing and distribution – ensure can easily be found online
- Improved roads, signage and information services = increased dispersal



Recommendations

3. Improving product and service delivery cont.

- Delivery of quality tourism experiences more than just the delivery of a tourism product – needs to encompass all factors that contribute to the whole visitor experience including:
 - accessibility
 - supporting infrastructure
 - services and amenities
 - quality service delivery
 - embrace the natural and urban environment.



Thanks!

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

