Byron Shire Visitor Profile and Satisfaction Survey

Darrian Collins
Manager, Regional Research
Tourism Research Australia (TRA)

Presentation outline

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

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

Recruitment

- Face-to-face intercept interviews at selected locations
- Recruitment survey
  - Basic demographics
  - Expenditure

Main survey
- Profiling
- Travel paths
- Expectations
- Satisfaction

Postcards left at different locations

Link to online survey

Self completion (by mail)
Survey sample

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

Sample
n = 342
Wave 1 = 197
Wave 2 = 145

n = 10 international
n = 26 unallocated

Domestic visitors
n = 259 (76%)
[Domestic overnight visitors
n = 196 (74%)]

International visitors
n = 83 (24%)
[International overnight visitors
n = 72 (87%)]

n = 62 Day visitors

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
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

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Byron</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>80%</td>
<td>85%</td>
<td>83%</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>15%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Business</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base = 341
Three quarters of visitors were less than 54 years

The highest proportion of visitors was in the family life stage

Byron Shire Benchmark

Byron Shire

Derived variable from demographic questions
The highest proportion of visitors travelled as a couple

![Chart showing travel party composition]

<table>
<thead>
<tr>
<th>Travel Party</th>
<th>Byron Shire</th>
<th>Benchmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Couple</td>
<td>35%</td>
<td>3%</td>
</tr>
<tr>
<td>Family</td>
<td>26%</td>
<td>0%</td>
</tr>
<tr>
<td>Friends or relatives</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>-2%</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…*

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%).

![Map showing state distribution]

*In which State or Territory do you reside?* 
*What is your home postcode?*
## Wave 1 versus Wave 2 visitors

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

## Trip planning and booking

- Past visitation
- Planning period
- Information sources
- Booking information
Seven in ten visitors were repeat visitors

First (Benchmark = 32%)  Return (Benchmark = 68%)  
Base = 341

“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

On the road/day just before I/we set out 9% 8%
On the day just before I/we set out 7% 7%
During the week before 16% 14%
About 2 to 3 weeks before 17% 15%
About 1 month to 3 months before 20% 25%
More than 3 months before 33% 40%

“When was the decision made to visit the Byron Shire?”
About two thirds of visitors used the internet for information

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

<table>
<thead>
<tr>
<th>Type of Site</th>
<th>Byron</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation operator sites</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>3rd party accommodation sites</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Airline company sites</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Official Government and Tourism sites</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Testimonial sites</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Travel Guide sites</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Car hire company sites</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>3rd party car hire sites</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>3rd party airline sites</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Car hire company sites</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Official Government and tourism sites</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Travel Guide sites</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Testimonial sites</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Other type of sites</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Base = 198

Other sites included search engines like Google and Google maps.

*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

<table>
<thead>
<tr>
<th>Method</th>
<th>Byron</th>
<th>Subgroup</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>The internet (Online)</td>
<td>51%</td>
<td>51%</td>
<td>51%</td>
</tr>
<tr>
<td>Travel agent (Not online)</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Real estate agent for holiday house/unit letting</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Tourist office/visitor information centre (Not online)</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>The local visitor information centre - after I arrived</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>The local visitor information centre - before I arrived</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Motoring Associations</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>32%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>None</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base = 311

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

*Which of the following did you use to make bookings for this trip to the Byron Shire?*
You mentioned that you used the internet for booking. What are the type of websites you went to?

Base = 157

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**

- Accommodation operator sites: 23%
- 3rd party accommodation sites: 14%
- Travel Guide sites: 13%
- www.visitbyronbay.com: 7%
- www.byron-bay.com: 6%
- Testimonial sites: 5%
- Official Government and Tourism sites: 5%
- 3rd party airline sites: 3%
- Car hire company sites: 1%
- www.visitnsw.com: 1%
- www.brunswickheads.org.au: 1%
- www.byronbayguide.com.au: 1%
- Travel agency sites: 1%
- www.byronhinterland.com.au: 0.5%
- www.bangalow.com: 0.5%
- 3rd party car hire sites: 0.5%
- Other type of sites: 9%

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**

<table>
<thead>
<tr>
<th></th>
<th>Wave 1 (April/May) (58%)</th>
<th>Wave 2 (May/June) (42%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat visitor</td>
<td>69% (n = 196)</td>
<td>74% (n = 145)</td>
</tr>
<tr>
<td>Trip planning</td>
<td>More than 3 months before 37%</td>
<td>More than 3 months before 26%</td>
</tr>
<tr>
<td></td>
<td>1-3 months before 23%</td>
<td>1-3 months before 26%</td>
</tr>
<tr>
<td></td>
<td>2-3 weeks before 14%</td>
<td>2-3 weeks before 21%</td>
</tr>
<tr>
<td>(n = 196)</td>
<td>(n = 141)</td>
<td></td>
</tr>
<tr>
<td>Information sources</td>
<td>Internet only 38%</td>
<td>Internet only 34%</td>
</tr>
<tr>
<td></td>
<td>Internet and non-internet sources 30%</td>
<td>Internet and non-internet sources 29%</td>
</tr>
<tr>
<td></td>
<td>Friends, relatives, been there before 20%</td>
<td>Friends, relatives, been there before 20%</td>
</tr>
<tr>
<td></td>
<td>(n = 196)</td>
<td>(n = 145)</td>
</tr>
<tr>
<td>Booking sources</td>
<td>Internet 53%</td>
<td>Internet 47%</td>
</tr>
<tr>
<td></td>
<td>No bookings made 27%</td>
<td>No bookings made 38%</td>
</tr>
<tr>
<td></td>
<td>(n = 180)</td>
<td>(n = 131)</td>
</tr>
</tbody>
</table>
Getting to and around the Byron Shire

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

Seven in ten visitors were self drive

<table>
<thead>
<tr>
<th>Transport Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private/own vehicle</td>
<td>58%</td>
</tr>
<tr>
<td>Air transport</td>
<td>15%</td>
</tr>
<tr>
<td>Rented/hire vehicle</td>
<td>14%</td>
</tr>
<tr>
<td>Bus/coach</td>
<td>11%</td>
</tr>
<tr>
<td>Railway</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

“What was the main form of transport that you used to get to the Byron Shire?”
Routes used to get to the Byron Shire

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

Base = 179

Routes used to leave the Byron Shire

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

Base = 187
On this trip which, if any, of the following towns did you visit?

Base = 341

Median Stops = 2 stops

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

Base = 341

Median Number of Day Stops = 2 stops

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

Base: *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

The highest proportions of visitors stayed in a rented house/apartment or a commercial caravan or camping ground
Wave 1 versus Wave 2 visitors

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

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

Reasons for visiting the Byron Shire

- Reasons for choosing destination
- Expectations of experiences
- Importance of destination attributes
The variety of things to see and do and spending time with others were the main reasons for visiting Byron Shire.

- There’s a variety of things to see and do: 30%
- It’s a great place for a family holiday: 23%
- It’s a great place to holiday with friends: 23%
- It is a great place to spend time with my partner: 21%
- It’s a great place to surf: 18%
- It was recommended by friends/travel agent: 17%
- To visit a specific attraction(s): 14%
- To experience nature: 14%
- To visit family there: 10%
- To attend a specific event or exhibition: 13%
- It was a convenient stop-over point: 12%
- To visit friends there: 12%
- A place that is untouched, undeveloped: 10%
- It’s a great place to find yourself: 9%
- Good deals on accommodation: 7%
- It’s a great place to come alone: 6%
- There were good deals on air fares: 4%
- To learn about the natural environment: 3%

Main reasons: Red
Most important reason: Black

This chart continued on next slide.....

…….. continued from previous slide

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

<table>
<thead>
<tr>
<th>Reasons for visiting</th>
<th>Wave 1 (April/May) (More than 3 points above Overnight visitor)</th>
<th>Wave 2 (May/June) (More than 3 points above Day visitor)</th>
<th>No difference (Within +/- 3 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>It’s a great place for a family holiday*</td>
<td>Variety of things to see and do</td>
<td>It’s a great place to holiday with friends</td>
</tr>
<tr>
<td></td>
<td>It’s a great place to surf*</td>
<td>It’s a great place to spend time with my partner</td>
<td>To visit family there</td>
</tr>
<tr>
<td></td>
<td>It was recommended</td>
<td>To visit specific attractions*</td>
<td>To visit friends there</td>
</tr>
<tr>
<td></td>
<td>To attend a specific/major event</td>
<td>To experience nature</td>
<td>It was a convenient stopover</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>It’s a place that is untouched, undeveloped</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>It’s a great place to find yourself</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Good deals on accommodation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>It’s a great place to come alone</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>T here were good deals on airfares</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To learn about the natural environment</td>
</tr>
</tbody>
</table>

* Significant difference at the 95% confidence level

Expectations for a number of experiences were above the benchmarks

This chart continued on next slide……
……. continued from previous slide

Expectations of Wave 1 versus Wave 2 visitors

<table>
<thead>
<tr>
<th>Expectations</th>
<th>Wave 1 (April/May) (More than 3 points above Wave 2 visitor)</th>
<th>Wave 2 (May/June) (More than 3 points above Wave 1 visitor)</th>
<th>No difference (Within +/- 3 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surfing experience</td>
<td>• Spend quality time with others</td>
<td>• To tour around and explore</td>
<td>• Relaxation and rejuvenation</td>
</tr>
<tr>
<td>Some something the kids would enjoy</td>
<td>• Market experience*</td>
<td>• Food and wine experiences</td>
<td>• Nature based experiences</td>
</tr>
<tr>
<td></td>
<td>• Good shopping</td>
<td>• To discover or learn something new</td>
<td>• Enjoyable entertainment and nightlife</td>
</tr>
<tr>
<td></td>
<td>• To experience arts or culture</td>
<td>• Luxury and indulgence</td>
<td>• An adventure</td>
</tr>
<tr>
<td></td>
<td>• Spiritual and healing experience</td>
<td>• Festival experience</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• To experience our nation’s history</td>
<td>• To experience our nation’s history</td>
<td></td>
</tr>
</tbody>
</table>

* 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. This chart continued on next slide...
Activities for Wave 1 verses Wave 2 visitors

<table>
<thead>
<tr>
<th>Activities</th>
<th>Wave 1 (April/May) (More than 3 points above Wave 2 visitors)</th>
<th>Wave 2 (May/June) (More than 3 points above Wave 1 visitors)</th>
<th>No difference (Within +/- 3 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• General sightseeing</td>
<td>• Go to the markets</td>
<td>• Bushwalking</td>
<td></td>
</tr>
<tr>
<td>• Go to the beach</td>
<td>• Visit history or heritage buildings</td>
<td>• Visit friends or relatives</td>
<td></td>
</tr>
<tr>
<td>• Eating out</td>
<td>• Participating in health or well being</td>
<td>• Cycling</td>
<td></td>
</tr>
<tr>
<td>• Go shopping</td>
<td>• Go on an organised tour</td>
<td>• Visit botanical gardens</td>
<td></td>
</tr>
<tr>
<td>• Visit a national or state park</td>
<td>• Business</td>
<td>• Activities for spiritual nourishment/finding yourself</td>
<td></td>
</tr>
<tr>
<td>• Picnics or BBQs</td>
<td>• Go on a charter/skippered boat</td>
<td>• Go on an organised tour</td>
<td></td>
</tr>
<tr>
<td>• Other water activities</td>
<td>• Golf</td>
<td>• Business</td>
<td></td>
</tr>
<tr>
<td>• Visit museums or galleries*</td>
<td>• Attend a conference</td>
<td>• Visit winery or cellar door</td>
<td></td>
</tr>
<tr>
<td>• Attend a festival or cultural event</td>
<td>• Participate in an environmental repair project</td>
<td>• Golf</td>
<td></td>
</tr>
<tr>
<td>• Go fishing*</td>
<td>• Go on an organised tour</td>
<td>• Attend a conference</td>
<td></td>
</tr>
</tbody>
</table>

* Significant difference at the 95% confidence level
Byron Bay Main Beach and Cape Byron Lighthouse were the most visited attractions

About 84% of visitors who visited Byron Bay Main Beach and 80% of those who visited Cape Byron Lighthouse were very satisfied with the attractions in the Byron Shire.

Attractions for Wave 1 versus Wave 2 visitors

<table>
<thead>
<tr>
<th>Attractions</th>
<th>Wave 1 (April/May) (More than 3 points above Wave 2 visitors)</th>
<th>Wave 2 (May/June) (More than 3 points above Wave 1 visitors)</th>
<th>No difference (Within +/- 3 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Byron Bay Main Beach</td>
<td></td>
<td>• Cape Byron Lighthouse</td>
<td>• Byron Bay Main Beach</td>
</tr>
<tr>
<td>Cape Byron Lighthouse</td>
<td></td>
<td>• Byron Bay Markets*</td>
<td>• Mullumbimby township</td>
</tr>
<tr>
<td>Byron Bay Markets</td>
<td></td>
<td>• Bangalow historic township</td>
<td>• Cape Byron National Park</td>
</tr>
<tr>
<td>Brunswick Heads township</td>
<td></td>
<td>• Bangalow Heritage Museum</td>
<td>• Byron Bay Arts and Industrial Estate</td>
</tr>
<tr>
<td>Watagoes Beach</td>
<td></td>
<td></td>
<td>• Broken Head Nature Reserve</td>
</tr>
<tr>
<td>Mullumbimby township</td>
<td></td>
<td></td>
<td>• Bangalow Markets</td>
</tr>
<tr>
<td>Clarke Beach</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bangalow historical village</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Farmers Markets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cape Byron National Park</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tallow Beach</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Byron Bay Arts and Industrial Estate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Broken Head Nature Reserve</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bangalow Markets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crystal Castle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bangalow Heritage Museum</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* 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
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?*

Better than expected
- Enjoyable nightlife and entertainment
- Relaxation and rejuvenation
- Spend quality time with partner/family/friends
- Good shopping
- Something the kids would enjoy
- Nature-based experiences
- Food and wine experiences
- An adventure
- Experience arts or culture
- Luxury and indulgence

Experience was not expected
- Experience our nation's/Australia's history
- Tour around and explore
- Discover or learn something new
- Experience our nation's/Australia's history
- Luxury and indulgence

Experience was not better than expected
- Enjoyable nightlife and entertainment
- Relaxation and rejuvenation
- Spend quality time with partner/family/friends
- Good shopping
- Something the kids would enjoy
- Nature-based experiences
- Food and wine experiences
- An adventure
- Experience arts or culture
- Luxury and indulgence

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

Drivers of overall satisfaction
- Local atmosphere
- Personal safety and security
- Friendliness of locals
- Food and beverage
- Appearance of the townships
- Variety of things to see and do
- Customer service
- Attractions
- Roads - Pacific Highway
- Shopping
- Information services

Drivers of overall satisfaction

More than 3 points above the VPS benchmark

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

……. continued from previous slide

- Entertainment/nightlife
- Commercial accommodation
- Value for money
- Signage
- Public toilets
- Roads - local roads
- Level of local traffic around Byron Bay
- Number of visitors
- Availability of parking
- Tours
- Local transport

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

n = 272
n = 334
n = 328
n = 336
n = 334
n = 332
n = 333
n = 314
n = 325
n = 323
n = 272

Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Dissatisfied

n = 309
n = 262
n = 334
n = 306
n = 313
n = 330
n = 327
n = 325
n = 309
n = 203
n = 271
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

“Again, thinking about your most recent trip to the Byron Shire, how important or unimportant was …”

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

“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)

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

“Visitors were happy with the local atmosphere and beaches

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

“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)
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 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?”

“Paid parking makes long beach days restricting while swimming around Byron.” (15-24 years, Repeat 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

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

Base = 342

Key Metrics

<table>
<thead>
<tr>
<th>Recommend</th>
<th>Total Likely</th>
<th>Very likely</th>
<th>Fairly likely</th>
<th>Neither likely nor unlikely</th>
<th>Fairly unlikely</th>
<th>Very unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Byron Shire</td>
<td>57%</td>
<td>30%</td>
<td>4%</td>
<td>6%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>53%</td>
<td>35%</td>
<td>3%</td>
<td>4%</td>
<td>9%</td>
<td>3%</td>
</tr>
</tbody>
</table>

“Very likely” | “Fairly likely” | “Neither likely nor unlikely” | “Fairly unlikely” | “Very unlikely”
About six in ten visitors were likely to return in 12 months

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

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

*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

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.
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!

darrian.collins@ret.gov.au