



Byron Shire Visitor Profile and Satisfaction Report: Summary and Discussion of Results

Introduction

The Byron Shire Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (TRA), within the Department of Resources, Energy and Tourism.

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

Method

The Byron Shire VPS project was conducted in the Byron Shire during April, May and June 2011. Two waves of face-to-face interviews were conducted: the first in mid April during the New South Wales and Queensland school holidays and the second in early June. The research was conducted over two periods to capture peak and off-peak visitation which has resulted in two distinct visitor profiles. These differences will be discussed in the summary. It should also be noted that this is a snapshot of a specific time of the year which needs to be taken into account when considering the results and in subsequent discussions and planning.

Since 2006, 76 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 capture a broader 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.

Visitor and trip characteristics

As discussed the survey sample was collected in two waves, with 58% of the sample from the first wave and 42% from the second wave. The key characteristics of the survey sample were as follows:

- The majority of visitors (80%) visited the region for holiday/leisure purposes (includes travel for entertainment), with 15% visiting friends and/or relatives (VFR).
- The highest proportion of visitors was in the family life stage (39%), with a further 18% in the older working singles/couples life stage, 16% in the young/midlife singles with no children life stage and 15% in the young/midlife couples with no kids life stage. The proportion in the young/midlife and family life stages were above the VPS benchmarks.
- There were three distinct travel parties – 35% travelled with their partner, 30% with their friends and/or relatives and 26% with their immediate families.



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- Three quarters (76%) of visitors were travelling domestically. About 44% of domestic visitors were from Queensland, 32% from New South Wales and 17% from Victoria.
- The highest proportions of international visitors were from New Zealand (18%), North America (16%), UK (16%), Scandinavia (10%) and Germany (9%).
- Comparing waves, the higher proportion of visitors in Wave 1 were in the family life stage (42%) with visitors travelling with their friends and/or relatives (32%), immediate family (29%) or partner (28%). In contrast the highest proportion of visitors in Wave 2 were in the older working/non working life stages (41%) and 45% were travelling with their partner.
- About seven in ten visitors (71%) were repeat visitors – a similar proportion to the VPS benchmark. There was a slightly higher proportion of repeat visitors in Wave 2 (74%) compared with Wave 1 (69%).
- A third of all visitors planned more than three months in advance, with 20% planning one to three months in advance. This was driven by Wave 1 visitors with 37% booking more than three months in advance compared with 26% for Wave 2.
- The internet was the most popular information source with 65% using the internet to obtain information for their trip. About 36% used the internet only¹ for information and 29% used it in combination with other sources like travel guide books and visitor information centres.
- The internet was also the most popular source for booking with 51% of visitors booking online.
- Accommodation operator sites, third party accommodation sites and airline sites were the most common sites used for information and booking. Accommodation operator sites were considered the most useful.
- Seventy two percent of visitors to the region were self drive, with 15% travelling by air transport and 11% by bus or coach. More than a third (36%) of international visitors travelled to the region by bus/coach.
- About 79% of visitors stopped overnight in the Byron Shire and 21% were on a day visit.
- A higher proportion of visitors in Wave 1 were on an overnight trip (86%) compared with Wave 2 (68%). Overnight visitors in Wave 1 also stayed longer (median = four nights) than those in Wave 2 (median = two nights).
- The median number of stops in the region was two - 90% of visitors stopped in Byron Bay, 32% in Bangalow, 31% in Brunswick Heads and 28% in Mullumbimby.
- The highest proportion of visitors who stopped in these towns stopped on a day trip, with the exception of Byron Bay.
- Nearly all visitors (96%) who stopped overnight in the region only stopped in one town in the region with 70% of overnight stops in the region in Byron Bay.
- Over a fifth of visitors (23%) stayed in a rented house/apartment, 21% in a commercial caravan or camping ground and 18% in a backpackers – the proportions in a rented house/apartment and backpackers were greater than the VPS benchmarks.

Motivations for visiting the Byron Shire

The most common reasons for choosing to visit the Byron Shire were the *variety of things to see and do* (30%); and because *it's a great place for a family holiday* (23%), *a great place to holiday with friends* (23%) and *a great place to spend time with your partner* (21%). The single most important reason was to *visit specific attractions* (29%).

Comparing the main reasons between waves, the main reason for visiting the region for Wave 1 visitors was because *it's a great place for a family holiday* with a significantly higher proportion visiting the region for that reason (29% compared with 15% in Wave 2). In contrast the main reason for visiting for Wave 2 visitors was *the variety of things to see and do* (35% compared with 26% for Wave 1).

The majority of visitors to the Byron Shire expected a range of experiences, with visitors' expectations for these experiences similar to or above the VPS benchmarks. This included:

- *Relaxation and rejuvenation* (88%; 12 percentage points above the VPS benchmark)
- *Spend quality time with partner/family/friends* (87%; 15 points above)

¹ Could be in combination with previous visits and/or friends and/or relatives recommendations.

- *Nature based experiences* (80%; 23 points above)
- *Tour around and explore* (79%; 3 points above)
- *Market experience* (66%; not benchmarked)
- *Food and wine experience* (63%; 18 points above)
- *Surfing experience* (61%; not benchmarked)
- *Good shopping* (58%; 22 points above)
- *Enjoyable entertainment and night life* (56%; 36 points above)
- *Discover and learn something new* (54%; 1 point below)
- *An adventure* (54%; 8 points above)
- *Experience arts or culture* (54%; 17 points above)
- *Luxury and indulgence* (51%; 12 points above).

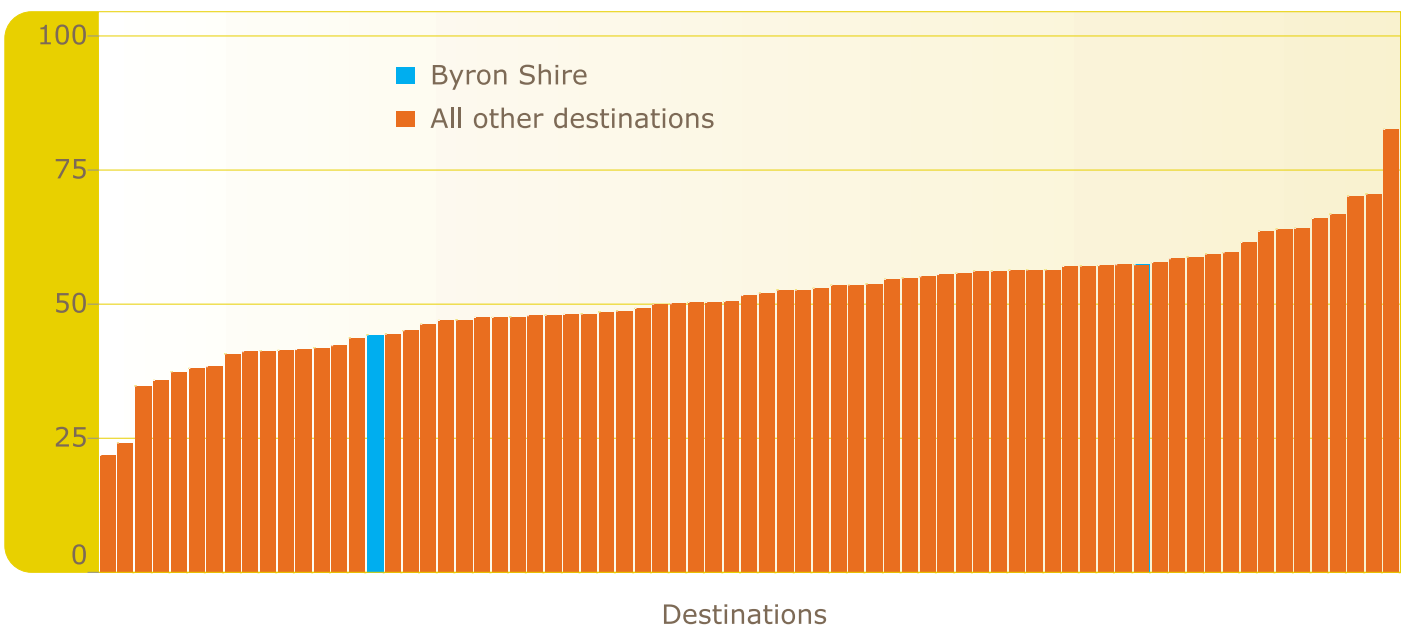
Just under half of visitors (46%) also expected *something for the kids to enjoy*, 14 points above the VPS benchmark. Comparing waves, although the proportion of visitors expecting many of the experiences were higher in Wave 2 than Wave 1, the differences were not significant. The exception was a *market experience* with 77% of Wave 2 visitors expecting this experience compared with 58% in Wave 1.

The only experience where expectations were better than expected when compared with the VPS benchmark was *enjoyable nightlife and entertainment*. In regions with high proportions of repeat visitors, it is generally harder to exceed expectations.

The motivations and expectations of the Byron Shire were reflected in the activities visitors undertook while in the region. The top five activities were *general sightseeing* (79%), *going to the beach* (76%), *eating out* (76%), *going shopping* (65%) and *going to the markets* (54%); with the proportion of visitors undertaking these activities greater than the VPS benchmarks. A higher proportion of visitors also *visited friends and relatives* (26%) and *undertook water activities* (17%) compared with the benchmarks. There were no significant differences in these activities between waves.

Satisfaction with the Byron Shire

The figure below shows where the Byron Shire ranks in overall satisfaction compared to all other participating VPS destinations. About 44% of visitors were *very satisfied* with the Byron Shire, seven points below the VPS benchmark of 51%. When comparing waves, 46% of Wave 2 visitors were *very satisfied* compared with 42% of Wave 1 visitors.



When comparing NET² satisfaction between VPS destinations, the result for the Byron Shire is much more positive. About 87% of visitors were *satisfied* with their visit to the Byron Shire, a similar proportion to the VPS benchmark (86%).

² Results for 'Very satisfied' and 'Fairly satisfied' visitors combined

A statistical analysis showed there were three key drivers of overall satisfaction:

- *Local atmosphere* (89% NET satisfied; 57% very satisfied)
- *Variety of things to see and do* (86%; 45%)
- *Attractions* (80%; 38%).

With the exception of *local atmosphere*, the proportions for each key driver were similar to or less than the VPS benchmarks for NET *satisfied* and *very satisfied*. The only other attributes where there were a higher proportion of visitors satisfied compared with the VPS benchmarks were *food and beverage* and *entertainment/nightlife*.

There were a number of functional attributes of the trip that scored below the VPS benchmarks in terms of satisfaction including 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.

There were four attributes particularly that had high levels of dissatisfaction with open ended comments highlighting some issues. These included:

- *Parking* – 27% dissatisfied – issues were noted around the cost of parking, lack of parking and signage about parking
- *Level of local traffic in Byron Bay* – 25% dissatisfied – issues were mainly around traffic congestion in Byron Bay in general
- *Public toilets* – 17% dissatisfied – issues were mainly around the cleanliness of the toilets
- *Local roads* – 15% dissatisfied – issues were noted around the general state of the roads.

Overall, the survey results show that visitors were generally happy with the local atmosphere in the Byron Shire. The region offers a variety of things to see and do including a range of experiences around the beach and natural environment, good shopping and markets, great food and enjoyable nightlife and entertainment. These experiences along with it being a great place to relax, indulge and spend time with others were the main motivators for visiting the region.

Recommendations

Despite the reasonable overall satisfaction score, there is scope to improve offerings (including quality) around a range of experiences and attributes. This is particularly important if the region's focus is to attract more first-time visitors to the region. The local industry should consider diversifying, reinvigorating and developing their products and services so as to remain competitive both domestically and internationally. The following recommendations are made for further consideration to assist the local industry with improving the region's productive capacity.

1. Stimulating consumer demand

- A key strength of the Byron Shire is the variety of things to see and do due to the vast range of experiences on offer in the region. This should be taken into consideration when marketing the region and increasing both first time and repeat visitation.

2. Improving product and service delivery

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

3. Product development and diversification

- There is a wide range of experiences on offer in the region around nature, food and wine and art and culture (including things for the kids to do). This gives visitors the opportunity to relax, indulge and spend time with others. Future tourism development aimed at these experiences should be sympathetic to the key characteristics of the region.
- Consider adapting tourism products and experiences to respond to the ever changing competitive environment particularly around changing consumer attitudes and travel behaviour.

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Image: Brunswick Heads Kites and Bikes Festival
Courtesy of: Northern Rivers Tourism

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