



Destination Visitor Survey

Strategic Regional Research - New South Wales

Fly-drive opportunities for the NSW North Coast: Summary of results

Introduction

In 2006 research was undertaken to understand the current fly-drive leisure market on the NSW North Coast. This included identifying the potential to increase this market and how best to realise that potential.

The research was a combination of two studies:

- 1) Visitors flying into the NSW North Coast airports
 - a) a total of 438 interviews were conducted
 - i) visitors were recruited at Ballina, Coffs Coast and Newcastle airports
 - ii) visitors were also recruited at the Gold Coast airport with a focus on those intending to travel to NSW
 - iii) visitors who travelled to the region for leisure, including holidays, events, and visiting friends and relatives (VFR) were surveyed
- 2) Visitors who fly-drive to areas other than the NSW North Coast
 - a) a total of 306 interviews were conducted

Summary

How many visitors chose to fly-drive?

Fly-drive visitors are those who fly to the destination, then hire a car to travel around; it excludes those who fly and drive to the destination, then hand in the hire car on arrival.

- Fly-drive visitors accounted for 43% of all leisure visitors to Coffs Coast (impacted by a major touch football event at the time of the survey), 30% of all leisure visitors to Newcastle, 26% of all leisure visitors to the Gold Coast and 21% of all leisure visitors to Ballina.
- A further 32% of total leisure visitors to the NSW North Coast considered hiring a car to travel around the destination.

Why do visitors fly-drive?

- Of all leisure visitors to the NSW North Coast, 40% stated freedom and independence as the main benefit of hiring a car, while 22% claimed they could do more, explore more or go further, and 12% stated that having a hire car was convenient, as it was easier to get around.
- Nearly one third (32%) of all leisure visitors stated the main disadvantage of hiring a car was the expense. One fifth stated there were no disadvantages to hiring a car.

What were the main reasons for visiting the NSW North Coast?

- About one third of all visitors to the NSW North Coast and/or Gold Coast visited for a holiday, leisure or relaxation.
- Just under one third (32%) visited friends or relatives (VFR).
- Visitors into the Gold Coast airport were more likely to visit for holidays (68%), while visitors into Ballina, Coffs Coast and Newcastle airports were more likely to visit friends or relatives (38%, 31% and 36% respectively).

What was the visitor's profile?

- Of all the NSW North Coast visitors, 63% were female and 36% were male. About 30% travelled as part of a couple.
- The majority of travel parties (80%) consisted of up to five people.
- Among the VFR visitors, 75% of travel parties comprised only one or two people.
- VFR visitors were more likely to travel alone (38%).

Visitors via Gold Coast airport

- The majority of leisure visitors entering via the Gold Coast airport came from Victoria (32%) and New South Wales (31%), and 12% from New Zealand.
- The Gold Coast had a high proportion of families visiting, especially among those not travelling into New South Wales. The average travel party size was 2.8.
- Leisure visitors to the Gold Coast tended to be younger.

Visitors via Ballina airport

- The majority of leisure visitors to Ballina came from New South Wales (67%).
- Ballina had a high proportion of couples and friends/relatives visiting. The average travel party size was 2.6.

Visitors via Coffs Coast airport

- Over half of leisure visitors to Coffs Coast came from New South Wales (56%).
- Although the highest proportion of leisure visitors to Coffs Harbour travelled alone (28%), Coffs Coast also attracted more clubs/sporting groups than other regions. The average travel party size was 4.3; however, this was most likely impacted by a major touch football event at the time of the survey.

Visitors via Newcastle airport

- The majority of leisure visitors to Newcastle came from Queensland (33%), Victoria (31%) and New South Wales (27%).
- About one third of leisure visitors to Newcastle travelled alone, and 30% travelled as a couple.
- Leisure visitors to Newcastle tended to be older.

How long did they stay?

- Of total leisure visitors, 29% stayed for one to three days, while 24% stayed for four to six days.
- About 28% of leisure visitors stayed for seven to 11 days.
- Of VFR visitors, 42% stayed for one to three days.
- Leisure visitors to the Gold Coast stayed longer, with 50% of visitors staying for seven or more days.
- Visitors to Ballina stayed on average for short periods, with 42% staying for one to three days, however, 35% stayed in Ballina for seven or more days.

- Only 28% of those visiting Newcastle stayed for more than seven days, with the highest proportion (36%) staying for one to three nights.
- About 38% of visitors to the Coffs Coast stayed seven nights or more, with 29% staying for one to three nights.

What transport did they use?

- Not all travellers used airlines to get to their destination, with more than half (53%) of NSW leisure visitors driving a private vehicle for at least part of the way.
- Two thirds of travellers to Newcastle used a private vehicle to reach their destination.
- There was a higher use of bus/coach/shuttle for travelling to Ballina (39%) and the Gold Coast (24%), while Newcastle and Coffs Coast both had very low use (11% and 7% respectively).
- Private and rented vehicles were the main forms of transport used by visitors to travel around the holiday destination.
- Fly-only travellers used their own/private vehicle (44%), a bus/coach/shuttle (37%), taxi (25%) or walked/hiked (21%).
- The Gold Coast had a higher proportion of travellers using a bus/shuttle.
- Ballina had a higher proportion who walked and cycled.
- Visitors to the Coffs Coast were more likely to use a rented vehicle, which may be due to a major sporting event being held in Coffs Harbour during the survey period.
- Visitors to Newcastle were more likely to use a private vehicle.

What accommodation did they use?

- For all leisure travellers, the main type of accommodation was staying at a friend's or relative's home (36%), followed by a resort (23%) and serviced apartment (14%).
- Fly-drivers (32%) were more likely to stay at a resort than fly-only visitors (21%).
- The Gold Coast had a higher incidence of travellers staying in serviced apartments (24%).
- Coffs Coast had a higher proportion of visitors staying in a resort (42%).
- Newcastle travellers stayed with friends or relatives (51%).
- A greater proportion of visitors to Ballina chose to stay with friends or relatives (39%) than in any other form of accommodation.
- Of all leisure travellers to the NSW North Coast, 83% stayed in only one place during their trip, while 13% stayed at two different places.
- Those staying in more than one place did so because they were travelling around the destination.
- Visitors to Coffs Coast were more likely to stay in one place (92%).
- Although 72% of visitors to Ballina stayed at one place, they were also more likely than others to stay at more than one place.

What did they do on the NSW North Coast?

- Casual dining (69%) and beaches (68%) were the main activities undertaken by all leisure travellers.
- Fly-drivers were more likely to visit local markets (30%), National/State Parks (16%) and nature/animal parks (10%) than fly-only travellers (22%, 9% and 4% respectively).
- Fly-only visitors were more likely to eat in up-market restaurants (31%) and indulge in massage, day spa or beauty treatments (13%) than fly-drive visitors.
- Those visiting friends or relatives enjoyed much the same activities as holiday visitors.

Why did they choose the destination?

- Holiday visitors to the NSW North Coast and the Gold Coast chose the destination because of good beaches (39% and 52% respectively), hot/warm weather (34% and 52% respectively), good accommodation (25% and 27% respectively) and familiarity (23% and 35% respectively).
- Other reasons for choosing particular destinations included:
 - good entertainment (33%) and a good deal/special offer (31%) for the Gold Coast
 - the natural environment (28%) and somewhere new and different (28%) for Ballina
 - to attend specific events for the Coffs Coast and Newcastle (29% and 30% respectively).

How did the visitors decide to visit?

- About 72% of all leisure visitors to the NSW North Coast decided to visit the destination one to two months before travelling, while 39% decided three to five months before, and 18% decided six to nine months before.
- The internet was used by 50% of leisure visitors to help them decide on a destination.
- Previous experience (39%) and advice from friends/relatives (27%) were also important sources.
- The majority of all leisure travellers (88%) thought that the adequacy of information available to assist their decision making was very good or reasonably good.
- Nearly three quarters (74%) of leisure visitors and 90% of VFR visitors did not consider any other destination for this trip.

How did they book?

- About 44% of all leisure visitors booked flights and accommodation about the same time, with 60% of leisure flights and 51% of accommodation booked one to five months ahead of the trip.
- About 29% booked flights only, and didn't pre-book accommodation.
- Car hire was booked well after flights and accommodation were booked, with 64% booking a rental car one week to two months before the trip.
- Nearly half of all activities (49%) were either booked on the day, or not booked at all.
- Two thirds (67%) of holiday visitors and 76% of VFR visitors booked their flights online.
- Flight bookings were made with travel agents by 21% of holiday visitors and 12% of VFR visitors.
- Direct accommodation bookings were made by 36% of holiday visitors and 44% of VFR visitors.
- The internet was used to book accommodation by 29% of holiday visitors and 15% of VFR visitors.
- Nearly one third (32%) of total leisure visitors used the internet to book their hire car, and 30% booked by phone.
- Only 7% of all leisure visitors booked activities over the internet, while 13% booked by phone.

What were visitors to the NSW North Coast expecting?

- Leisure visitors expected to relax, unwind (71%), enjoy the beach (56%), spend quality time with friends or family (45%) and beautiful scenery (31%).
- In addition, visitors to Ballina and the Coffs Coast also expected casual dining (30% and 26% respectively), and to be active and healthy (both 29%).
- Visitors to the Gold Coast also expected shopping (35%) and casual dining (27%).
- Newcastle visitors also expected to tour around and explore (27%), casual dining (17%) and good food and wine (17%).

Were they satisfied with their visit?

- The majority of holiday visitors (90%) and VFR visitors (84%) were satisfied with their trip to the NSW North Coast.
- Nearly all holiday visitors (95%) and VFR visitors (93%) considered their holiday good value for money.
- Nearly all holiday visitors (95%) and VFR visitors (91%) would recommend the NSW North Coast to others.

Will they visit the NSW North Coast again?

- The majority (82%) of holiday visitors plan to return within the next three years, including 61% within the next 12 months.
- Most VFR visitors (92%) plan to return within the next three years, including 75% within the next 12 months.

Would fly-drivers to other States/Territories consider holidaying on the NSW North Coast?

- Nearly all fly-drivers to other destinations stated they were open to a holiday on the NSW North Coast, and 93% would consider one or more destinations. However, there was less interest in fly-drive as an option.
- Among those who fly-drive to other destinations, there was relatively low awareness of direct airport access into the NSW North Coast; particularly so for Ballina/Byron (only 39% were aware of direct flights) and Port Macquarie (only 43% were aware of direct flights). However, awareness increased for Coffs Harbour (50%), Newcastle (61%) and Gold Coast (68%).

For a copy of the full Strategic Regional Research Report, please email tra@tourism.australia.com

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