

Eurobodalla Shire Council

Winter Visitor Research 2018

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Date: October 23, 2018



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Background



Methodology & Sample

Objectives

Following a visitor survey conducted during the January 2018 school holidays (summer), Eurobodalla Shire Council (Council) commissioned Micromex to assist with a second Visitor survey during August and September 2018 (winter) in order to:

- Profile visitors (by demographics, origin, etc)
- Understand the visit experience (activities undertaken, accommodation, spend, satisfaction)
- Understand the booking process
- Compare any differences in the visitor experiences during the summer and winter periods

Sample Design:

In this winter survey a two-stage sample design/methodology was used:

- Visitors were initially recruited face-to-face **by Council employees** at a number of areas around the Eurobodalla Shire Council LGA: The Mogo Zoo, Mogo village, Moruya Markets, Central Tilba Growers Market, Batemans Bay (in the town centre and at the Visitor Centre), Batehaven Markets at Corrigans Beach, Narooma (Visitor Centre, town wharf and Riverside Park) and Bodalla (Bodalla Dairy Shed and café (outside)). Recruitment was conducted from August 10th to September 17th, 2018. A total of 465 Visitors were recruited. Name, email address and phone details were collected at the time of recruitment.

'Visitors' excluded those who live/work within the Eurobodalla Shire – and those who were there only for business/conference were also excluded – but if they were also there for recreation they were included.
- All of the recruited visitors were emailed an access link to the online survey by Micromex. N=218 of the 465 recruited visitors completed the full survey over the period August 28th to October 2nd, 2018. A sample size of 218 provides a maximum sampling error of plus or minus 6.6% at 95% confidence (this means for example, that an answer 'yes' (50%) to a question could vary from 43% to 57%).

Micromex undertook the face-to-face recruitment for the Summer Wave, whereas Council employees conducted the recruitment for the Winter wave. More recruitment locations were used by Council for the Winter wave – and there was arguably more focus in Winter on recruiting at attractions/destinations rather than in town centres, which may have some impact on the respondent profile.

Methodology & Sample

The Questionnaire

Micromex Research, together with Eurobodalla Shire Council, updated the 'Summer 2018' questionnaire for use in this Winter wave.

Data analysis

The data within this report was analysed using Q Professional.

Percentages

All percentages are calculated to the nearest whole number and therefore the total may not exactly equal 100%.

Word Frequency Tagging

Verbatim responses for open questions were collated and entered into analytical software. This analysis 'counts' the number of times a particular word or phrase appears and, based on the frequency of that word or phrase, a font size is generated. The larger the font, the more frequently the word or sentiment is mentioned.

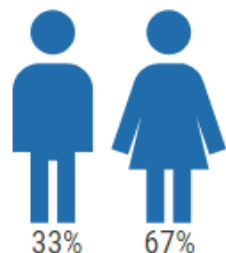


Sample Profile

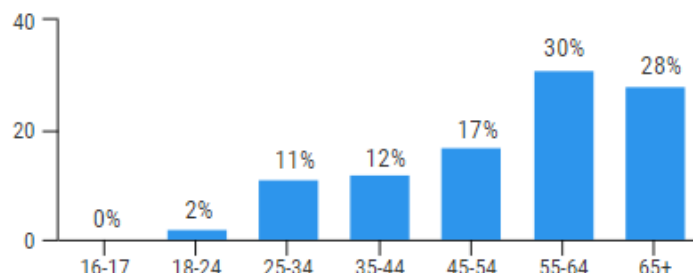


Sample Profile

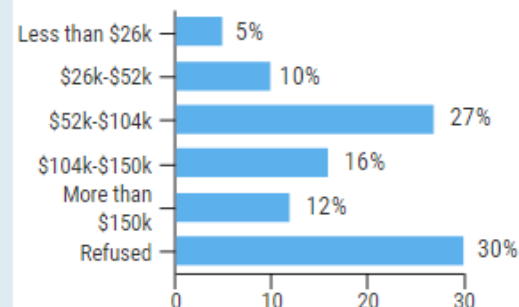
Gender*



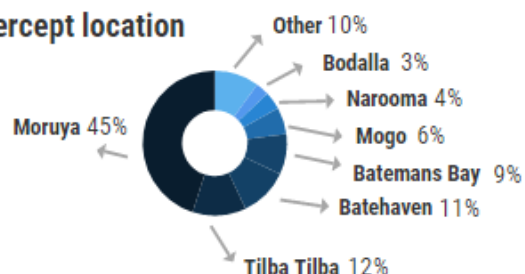
Age*



Annual household income



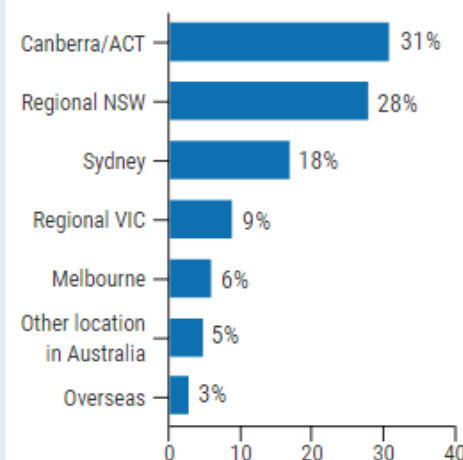
Intercept location



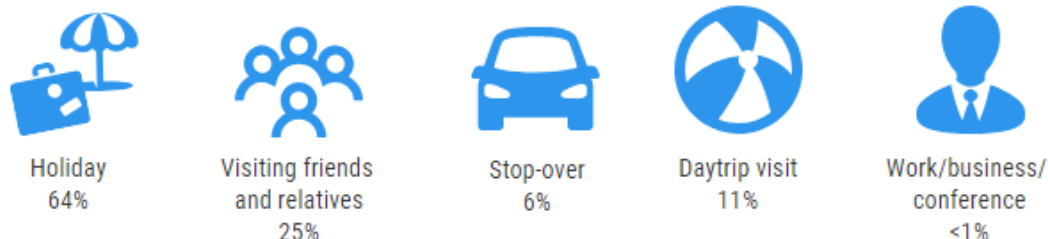
Australian residency



Place of residence



Reason for visiting



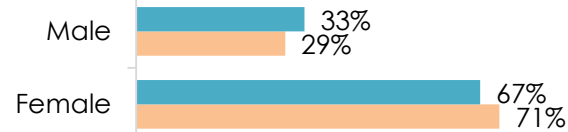
N = 218 surveys

* 2 respondents refused to answer gender and age

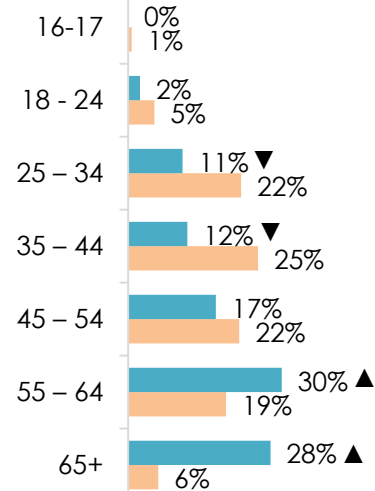
Two-thirds (67%) of respondents were female and 58% of respondents were over the age of 54. 77% of respondents were from 'Canberra/ACT', 'regional NSW' or 'Sydney'.

Sample Profile – Comparison to Summer

Gender



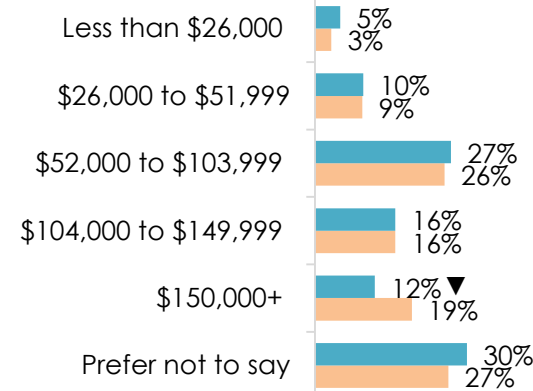
Age



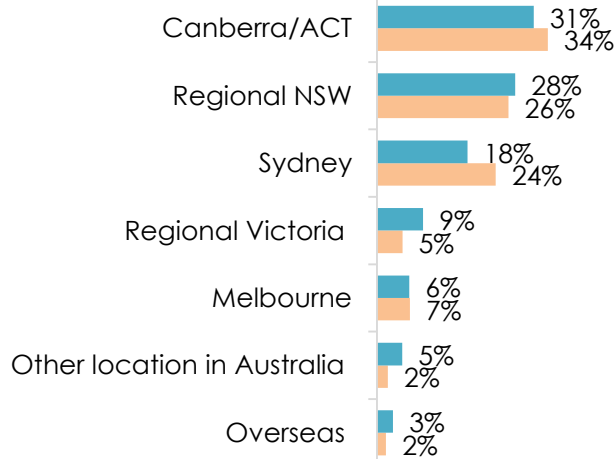
Australian resident



Household income



Place of residence



0% 20% 40% 60% 80% 100%
■ Winter (N=218) ■ Summer (N=275)

0% 20% 40% 60% 80% 100%
■ Winter (N=218) ■ Summer (N=275)

▲ ▼ = significantly higher/lower (compared to summer)

Note that the Winter sample profile is significantly older than the Summer sample profile – whilst a slightly different recruitment location profile (see Slide 4) could have contributed to this difference, it may also reflect a seasonal difference in visitors.

Key Findings



Key Findings

Overview:

- The profile of winter visitors is different to summer – visitors are older and as such are less likely to have children under 16 years with them.
- People are enjoying visiting Eurobodalla regardless of the season, with at least 91% of winter visitors stating they were at least 'somewhat satisfied' with their experiences in Eurobodalla, on par with summer (88%).
- Likelihood to recommend Eurobodalla as a place to visit remained 'extremely high' for winter visitors, with all visitors stating they were at least 'somewhat likely' to recommend it. Those that were 'very likely' to recommend were significantly more satisfied with 12 of the 15 experiences listed in the survey.



What's the same in winter:

- Despite having significantly lower satisfaction with beaches, water-based and nature-based activities, over half of winter visitors (52%) stated the natural environment including beaches, national parks, coastline and the scenery was the aspect they like most about the Eurobodalla region, this is similar to the result seen in the summer (48%).
- The love for Eurobodalla's natural environment is again reiterated with the fact that the top 2 reasons for choosing to visit Eurobodalla for winter visitors were 'beautiful beaches and waterways' (61%) and 'great scenery and natural attractions' (55%).
- When asked how Council and tourism operators could make the tourist experience better, 40% of winter visitors stated 'nothing' or that they were happy with their experience, significantly more than summer visitors (29%). The most common suggestions from winter visitors that stated an improvement, were for more information on what the area offers (10%) and more/longer parking (6%).
- 87% of visitors in winter had previously visited Eurobodalla, on par with summer visitors (90%). Of those in winter who have visited before, over half (52%) had visited earlier in 2018.



Key Findings

What's changed in winter:

- Visitors in winter were significantly less satisfied with 'beaches and water-based activities and experiences', 'nature-based activities and experiences' and 'range of things to do' – this result may simply reflect that the colder weather limits the ability to access and enjoy outdoor activities.
- The activities undertaken differed in the winter compared to the summer, with visitors significantly more likely to engage in 'sightseeing' activities, but significantly less likely to engage in 'eating out', 'water based activities' and 'family activities'
- The proportion of people visiting for 'holiday' significantly decreased in the winter (64% cf. 76%), while those 'visiting friends and relatives' significantly increased (25% cf. 15%).
- Average trip lengths were significantly shorter in winter (4.6 nights cf. 6.8 nights), with 59% of trips being 1 to 3 nights long, compared to 31% in summer.
- The amount of money spent in all areas asked was significantly lower, however this is due at least in part to the reduced length of stay as the spend per night is almost identical between winter and summer (see next page).



Key Findings

VISITOR EXPERIENCES Category NET subtotals



92%▲ (85%)
'net' went sightseeing



90%▼ (95%)
'net' ate out



90% (90%) 'net'
went shopping



88% (88%) 'net'
experienced recreational/
leisure activities



78%▼ (92%)
'net'
experienced water-based
activities



57%▼ (66%)
'net'
experienced family activities

VISITOR SPENDING



Accommodation



Takeaways &
restaurant meals



Groceries for self-
catering



Retail shopping



Alcohol

Summer results in orange, ▲▼=Significantly higher/lower (compared to summer)

Significantly more visitors in winter went sightseeing than in summer, however significantly less ate out, experienced water-based activities and family activities.

Spending for visitors in winter decreased significantly for all areas, however this was due at least in part to the decline in the length of stays for winter visitors. The total spend for winter visitors per night of stay was the same as for summer (\$166/night cf. \$169/night), indicating visitors are still spending at the same rate, but for fewer days.

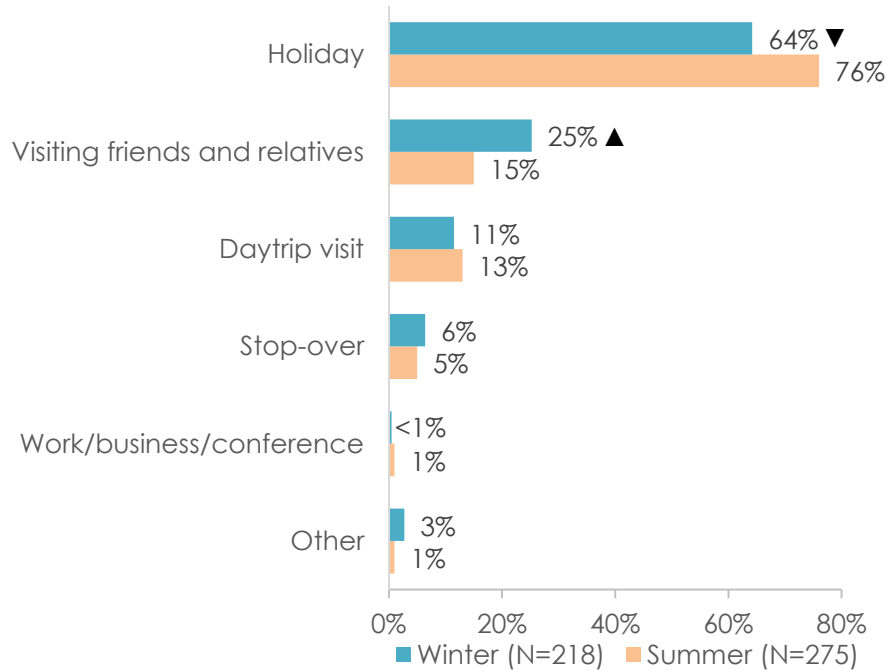
Findings in Detail:

1. About Your Visit



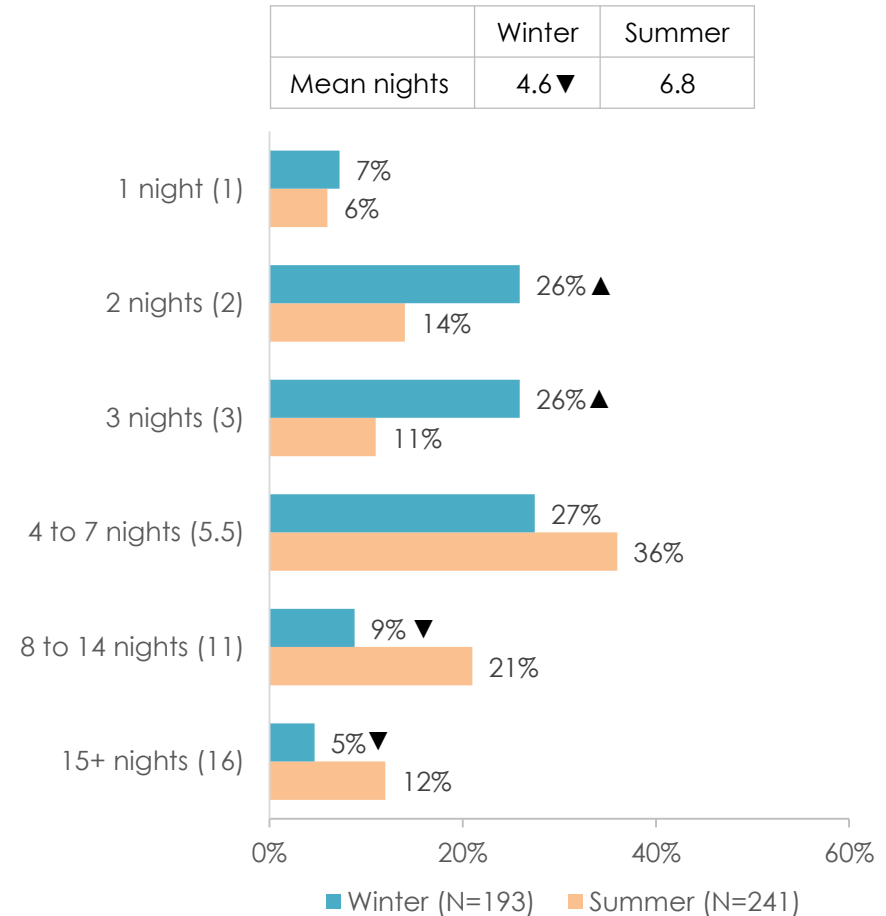
Travelling Details

Q2. Which of the following best describe why you were visiting the Eurobodalla Shire when we intercepted you?



Other specified	Count
Tennis tournament in Moruya	2
Bowls weekend	1
Cycling	1
Seeing mechanic	1
Visiting Moruya Market	1

Q8. (If not 'daytrip visit') How many nights in total did you stay in the Eurobodalla Shire?



Note: Numbers in brackets represent values used to calculate mean number of nights stayed

▲ ▼ = A significantly higher/lower (compared to summer)

Please see the Appendix A for residency of day-trippers

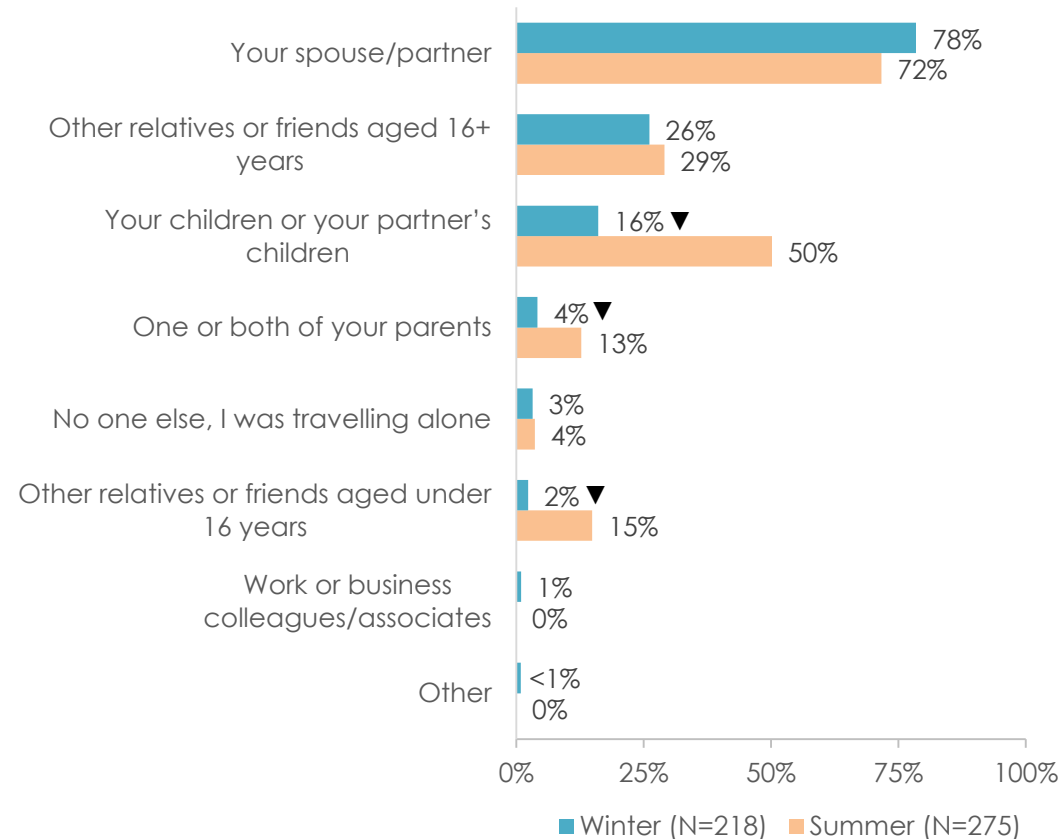
The proportion of people visiting for 'holiday' significantly decreased in the winter (64% cf. 76%), while those 'visiting friends and relatives' significantly increased (25% cf. 15%).

Average trip lengths were significantly shorter in winter (4.6 nights cf. 6.8 nights), with 59% of trips being 1 to 3 nights long, compared to 31% in summer.

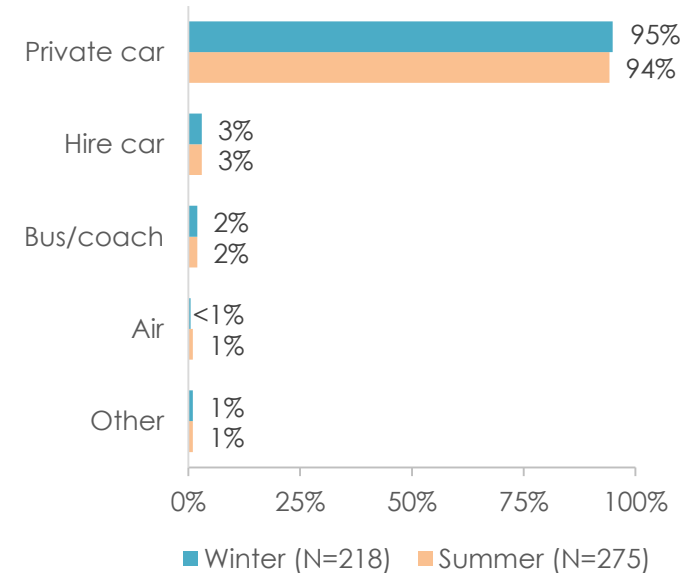
Travelling Details

Q3. Who else, if anyone, was with you while you were visiting the Eurobodalla Shire?

Q4. How did you travel to the Eurobodalla Shire from your previous location?



Other specified	Count
Cycling group	1



Other specified	Count
Motorhome/campervan	3

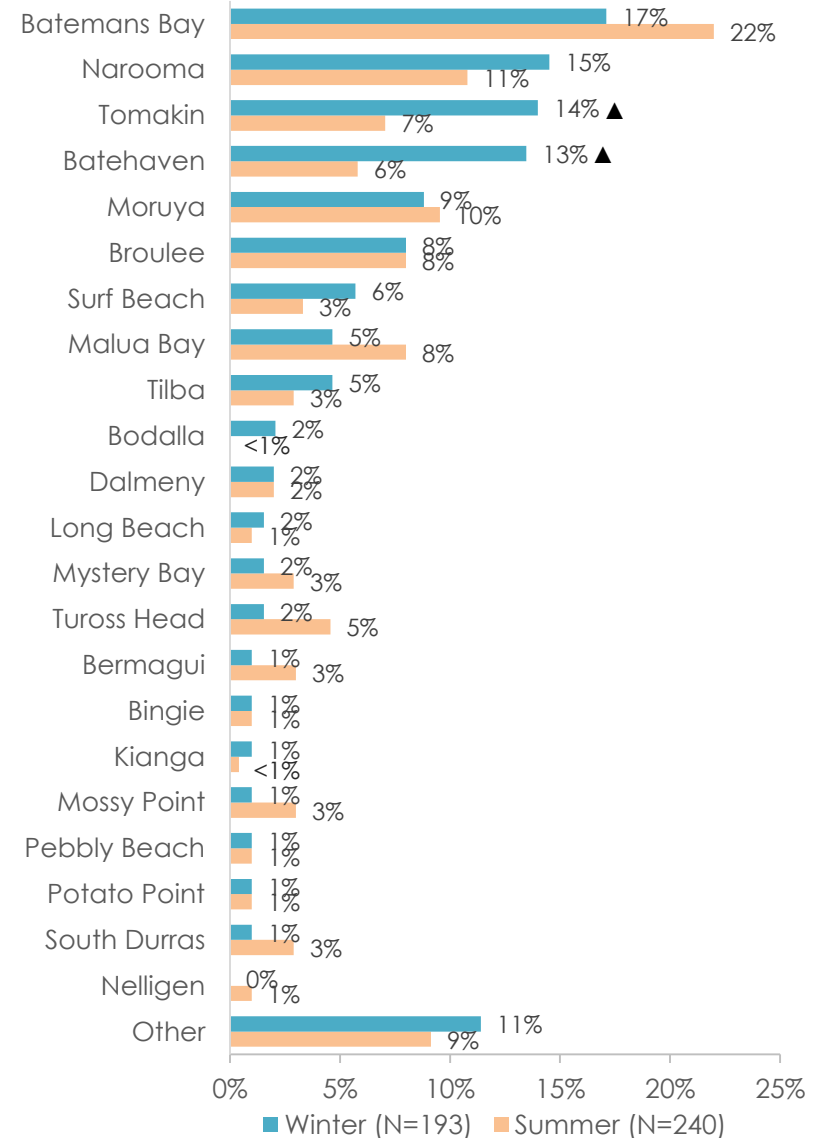
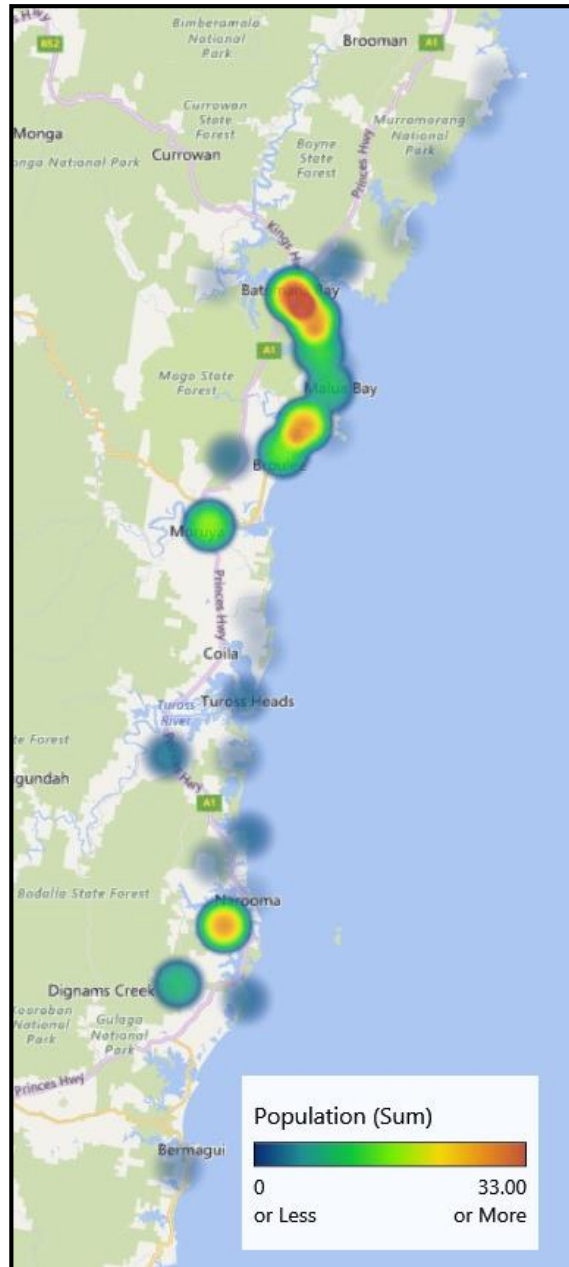
▲ ▼ = A significantly higher/lower percentage (compared to summer)

Slightly more visitors were travelling with their 'spouse/partner' in winter (78% cf. 72%), while there was a significant decrease in visitors travelling with 'your children or your partner's children' (16% cf. 50%) and 'other relatives or friends aged under 16 years' (2% cf. 15%), this could be due to the larger proportion of those over the age of 54 visiting in winter.

Accommodation in Eurobodalla Shire

Q5. (If NOT 'Daytrip' on Q2), Where did you stay during your visit to the Eurobodalla Shire?

The majority of Winter visitors were concentrated on the coast from Batemans Bay to Broulee, with other groupings seen in Moruya and Narooma.



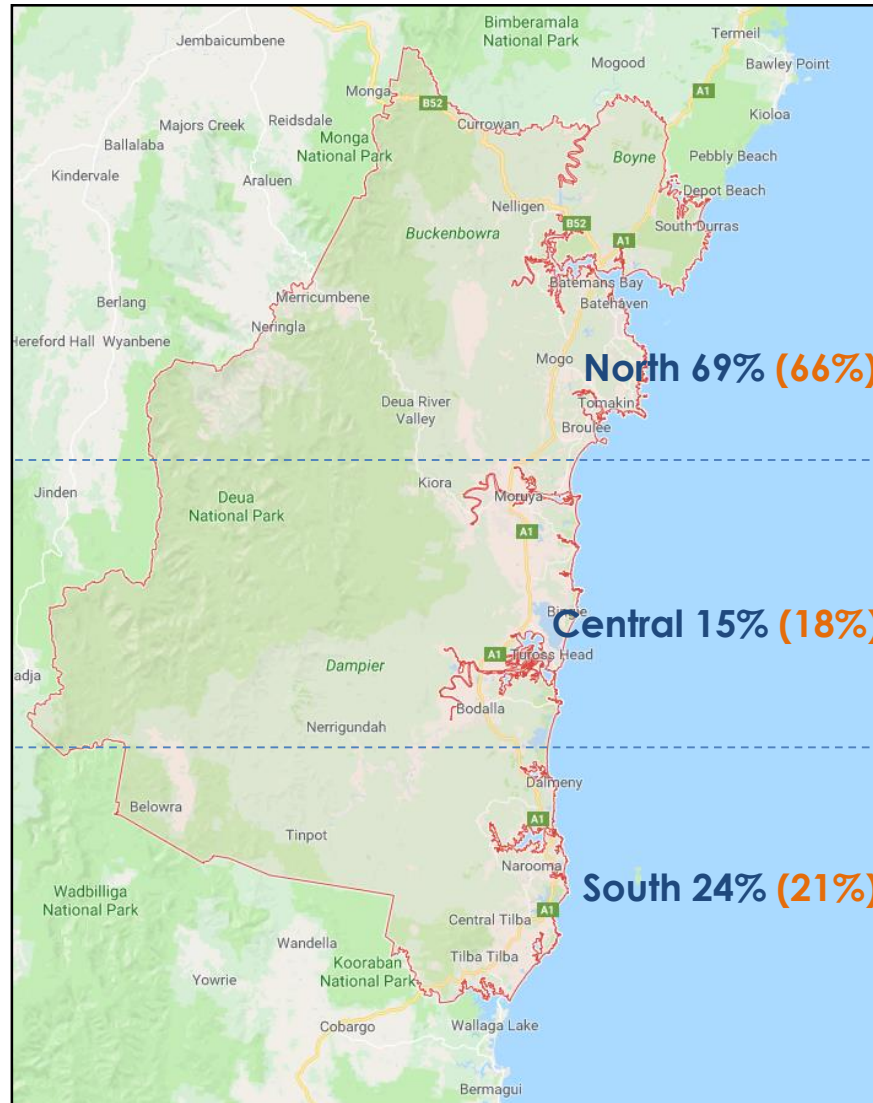
Note: respondent recruitment location changes may have resulted in some differences seen above

Please see the Appendix A for 'other specified'

▲ ▼ = A significantly higher/lower percentage (compared to summer)

Accommodation Location

Q5. (If NOT 'Daytrip' on Q2), Where did you stay during your visit to the Eurobodalla Shire?



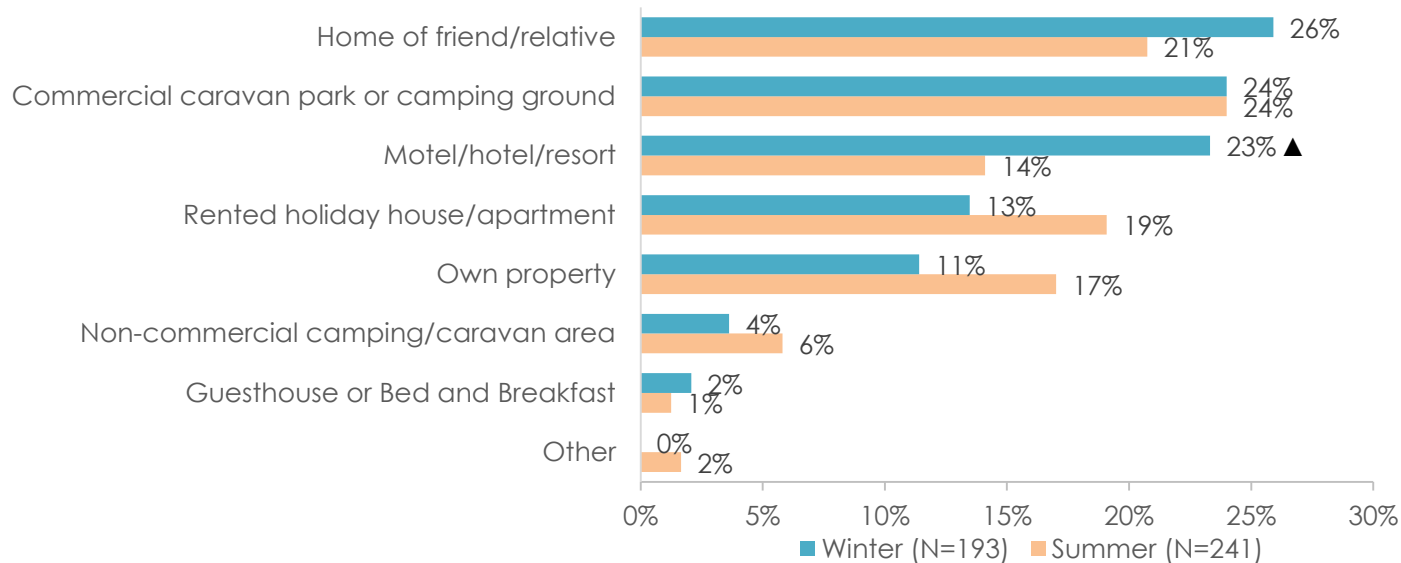
	Location stayed	Intercept location
North	69%	26%
Central	15%	48%
South	24%	26%

Base: Winter N=193, Summer N=239

Please note: percentage exceeds 100% as participants could select more than one location

Accommodation in Eurobodalla Shire

Q6. What type of accommodation did you use during your visit to the Eurobodalla Shire?



Please note: summer results for Q6 have been updated to only include those staying in Eurobodalla Shire

▲▼=Significantly higher/lower percentage (compared to summer)

Q8. How many nights in total did you stay in the Eurobodalla Shire?							
No. of nights	Guesthouse or B&B	Commercial caravan/ camping	Non-commercial camping/ caravan	Rented holiday house/ apartment	Home of friend/ relative	Motel/hotel/ resort	Own property
1-3 nights	75%	59%	86%	62%	46%▼	65%	59%
4 to 7 nights	25%	26%	14%	23%	26%	33%	32%
8+ nights	0%	15%	0%	15%	28%▲	2%▼	9%
Mean # of nights	3.1	4.9	2.9	4.7	6.0▲	3.3▼	4.4
Base	4*	46	7*	26	50	45	22

▲▼=Significantly higher/lower (by accommodation type)

*Caution: low base size

The most common accommodation types visitors used were 'home of a friend/relative' (26%), 'commercial caravan park or camping ground' (24%) and 'motel/hotel/resort' (23%). In winter, significantly more visitors stated they stayed in 'motel/hotel/resort' (23% cf. 14%).

Those who stayed at 'home of friend/relative' visited for a significantly longer number of nights on average (6.0 nights), while those who stayed at 'motel/hotel/resort' visited for a significantly shorter number of nights (3.3 nights).

Findings in Detail:

2. Visitor Experiences



Improving the Visitor Experience

Q9. What, if anything, could the Eurobodalla Shire Council or tourism operators provide or improve to better meet your needs and expectations when visiting the area?

"It was an extremely enjoyable stay. The locals were very friendly. It is a beautiful part of NSW and I could not fault it"

"Nothing! Love everything as it is"

"More local tourist information on places to visit, walks, lookouts"

"Keep it small, local and just as lovely as it is"

"Better parking in town"



Response	Winter (N=218)	Summer (N=274)
Nothing/very happy with my visit/area	40%▲	29%
More information/promotion on what the area offers	10%	12%
More/longer parking	6%	6%
More road signage/directions	5%	2%
More/better restaurants/shopping options	4%	7%
Extended hours of restaurants and shops/open on public holidays and weekends	4%	3%
Better footpaths/cycleways	3%	1%
Markets have more stalls/offer local produce	2%▲	0%
Clean up beaches/foreshore area/more frequent cleaning of public amenities	2%	2%
Don't know	4%▼	9%

▲ ▼ = A significantly higher/lower percentage (compared to summer)

Please see the Appendix A for responses fewer than 2%

40% of visitors believe that Eurobodalla Shire Council or tourism operators do not need to change anything to better meet their needs when visiting the area. The most common suggestions from visitors that stated an improvement, were for more information on what the area offers (10%) and more/longer parking (6%).

Most Valued Aspect

Q10. And what, if anything, do you like most about the Eurobodalla region as a place to visit?

Response	Winter (N=215)	Summer (N=273)
Natural environment - beaches, national parks, coastline and beautiful scenery	52%	48%
Peaceful/relaxed lifestyle	12%	10%
Friendly people/sense of community	7%	4%
Easy access to a variety of things to do - restaurants, shopping , markets, etc.	6%▼	11%
Love the area/nice place/holiday destination	5%	4%
Climate/weather	3%	3%
Location - close to home/city	3%	2%
I like the Mogo village/zoo	2%▲	0%
Walks/bike tracks	2%▲	0%
Well maintained/clean/safe area	2%	5%
Good restaurants	1%	3%
Family that live here/grew up in the area	1%	0%
Not overpopulated/not too touristy/unspoilt	1%▼	6%
Make better signage of major attractions	<1%	0%
We enjoyed Tilba	<1%	0%
I Like Narooma	0%	1%
Lovely caravan park	0%	<1%
Don't know/nothing	0%▼	3%

▲ ▼ = A significantly higher/lower percentage (compared to summer)



"The great scenery...be it coastal or inland!! Some unexpectedly delicious eateries!"

"We adore the focus on slow, local, lovely living. Each town visited had a welcoming community, a wonderful natural beauty and lots to see and do"

"The beauty of the almost pristine coastline"

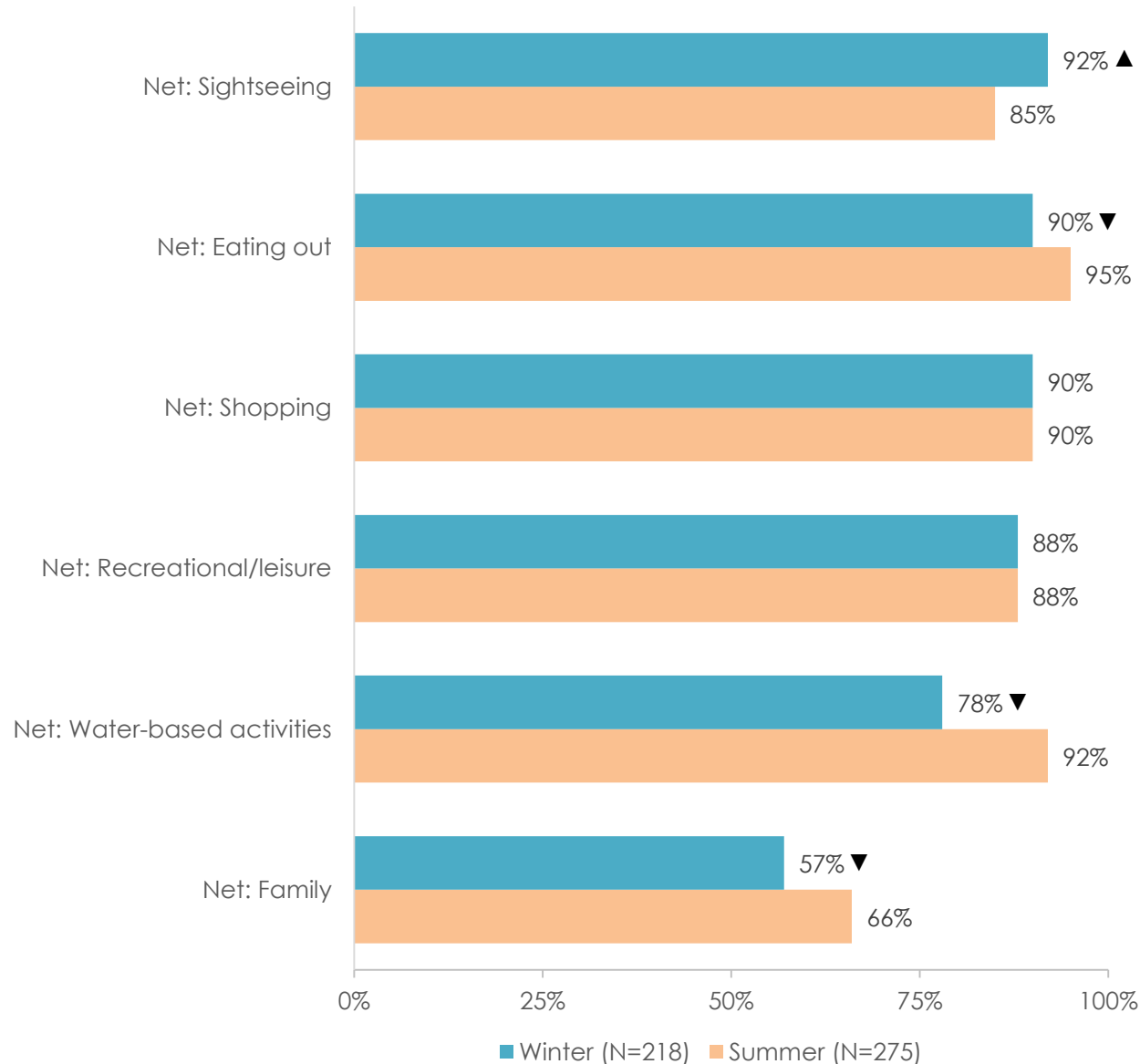
"Pretty country town, interesting shops, lots of good parking and good coffee shops"

"Peace and quiet. Not saturated with visitors"

The natural environment (beaches, national parks, coastline and beautiful scenery) continues to be the aspect most liked by visitors to the Eurobodalla region in winter (52%), followed by the peaceful and relaxed lifestyle (12%).

Activities Undertaken

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

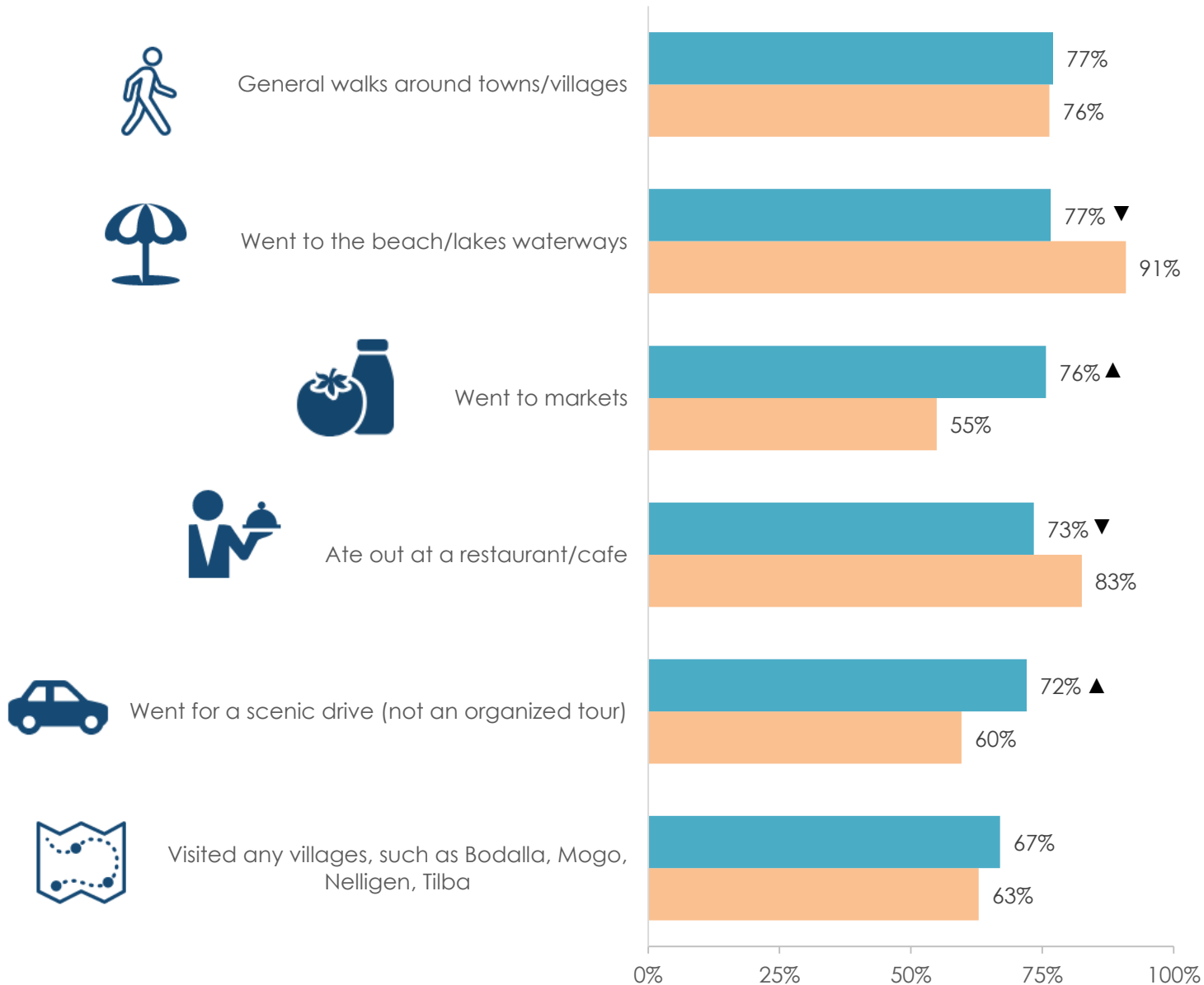


▲ ▼ = Significantly higher/lower percentage (compared to summer)

Top Activities Undertaken

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

This Chart summarises the six most frequently undertaken activities in the winter from the full list of 33. 4 of the 6 activities significantly differed in the proportion of visitors engaging in them in the winter compared to the summer – whilst most of these differences most likely reflect seasonality, the increase in 'markets' may reflect more recruitment at markets in Winter.

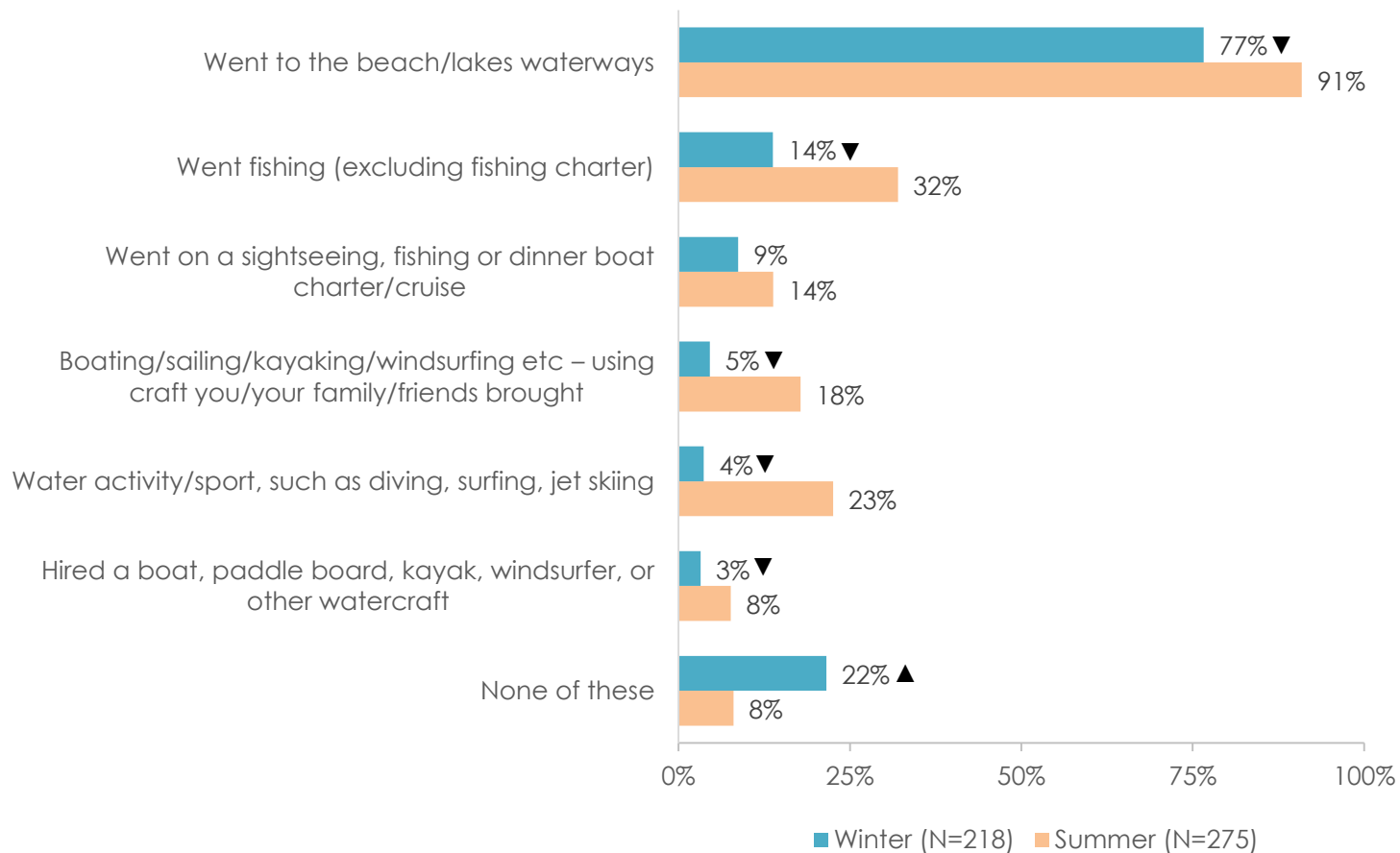


Base: N = 218

▲ ▼ = Significantly higher/lower percentage (compared to summer)

Water-Based Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?



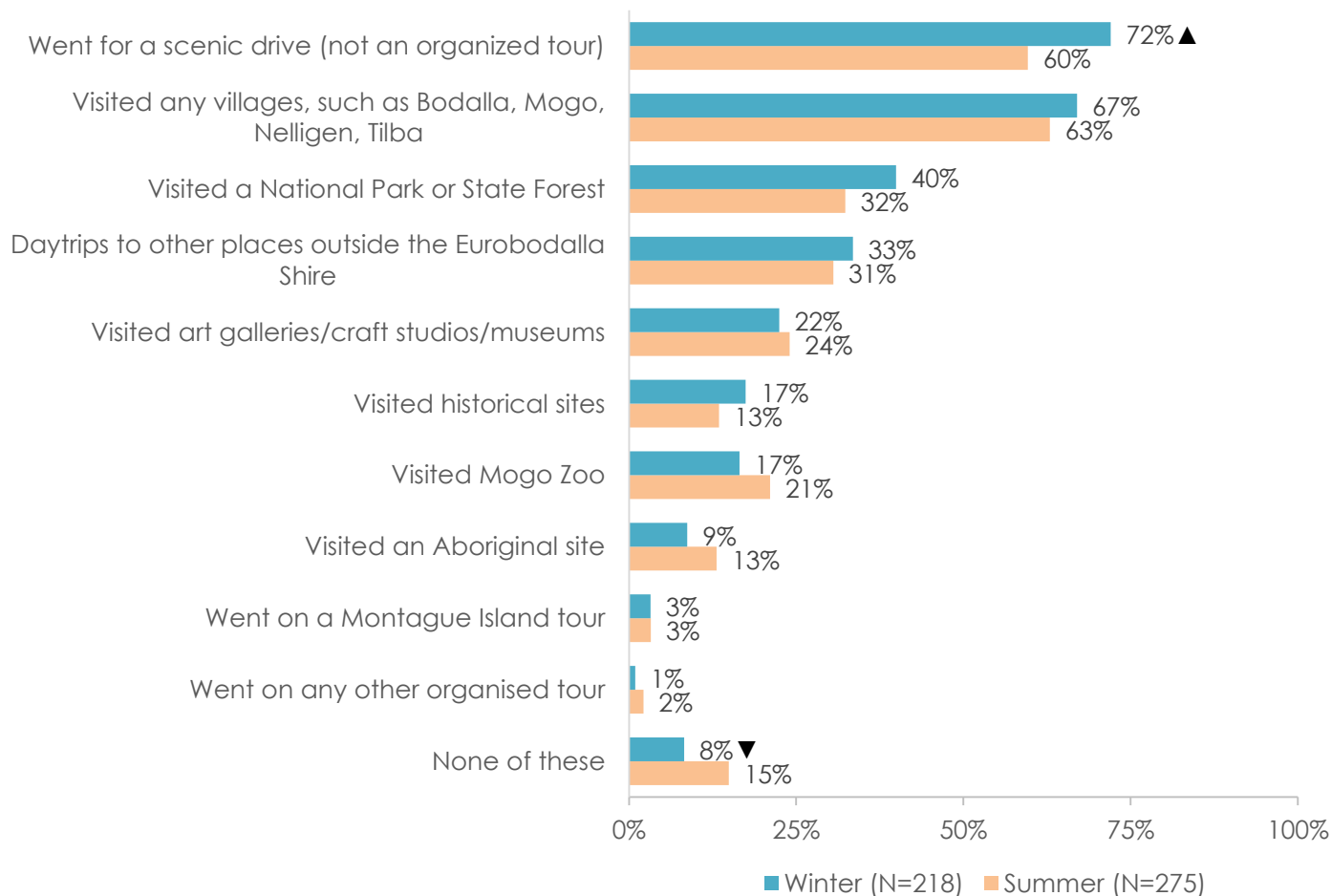
▲ ▼ = Significantly higher/lower percentage (compared to the summer)

Please see the Appendix A for results by demographics/location of stay

Usage of all water-based activities decreased in winter, with all but 'went on a sightseeing, fishing or dinner boat charter/cruise' decreasing significantly.

Sightseeing Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?



▲ ▼ = Significantly higher/lower percentage (compared to the summer)

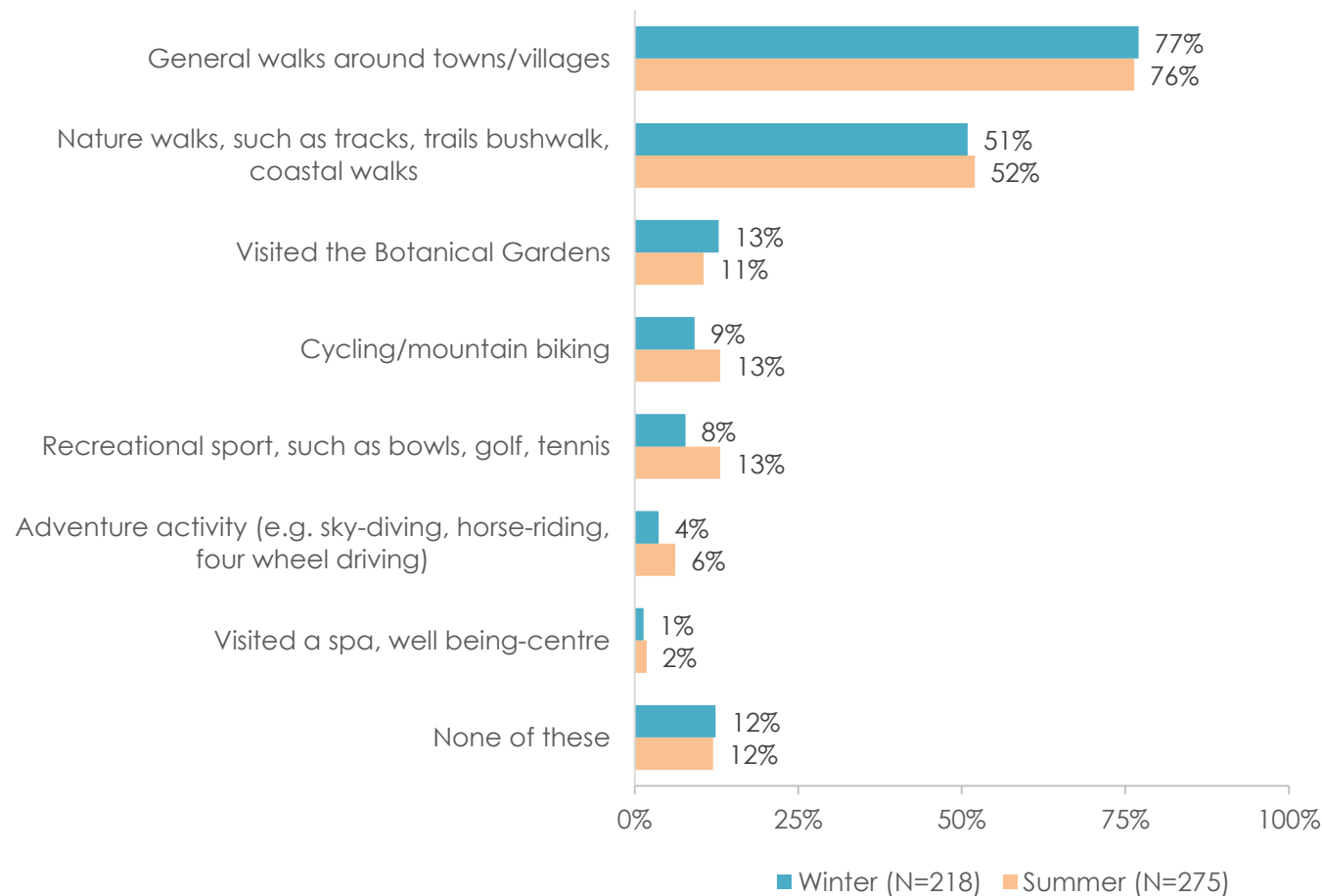
Please see the Appendix A for results by demographics/location of stay

The most common sightseeing activity for winter visitors was 'went for a scenic drive (not an organized tour)' (72%), with a significantly greater proportion of visitors experiencing this activity in winter than in summer (60%).

When comparing results by location of stay, visitors who stayed in the 'south' of Eurobodalla were significantly more likely to experience 'daytrips to other places outside Eurobodalla' (57%) and 'visited art galleries/craft studios/museums' (37%), while those who stayed in the 'central' part of Eurobodalla were significantly less likely to have 'visited any villages' (46%).

Recreational/Leisure Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?



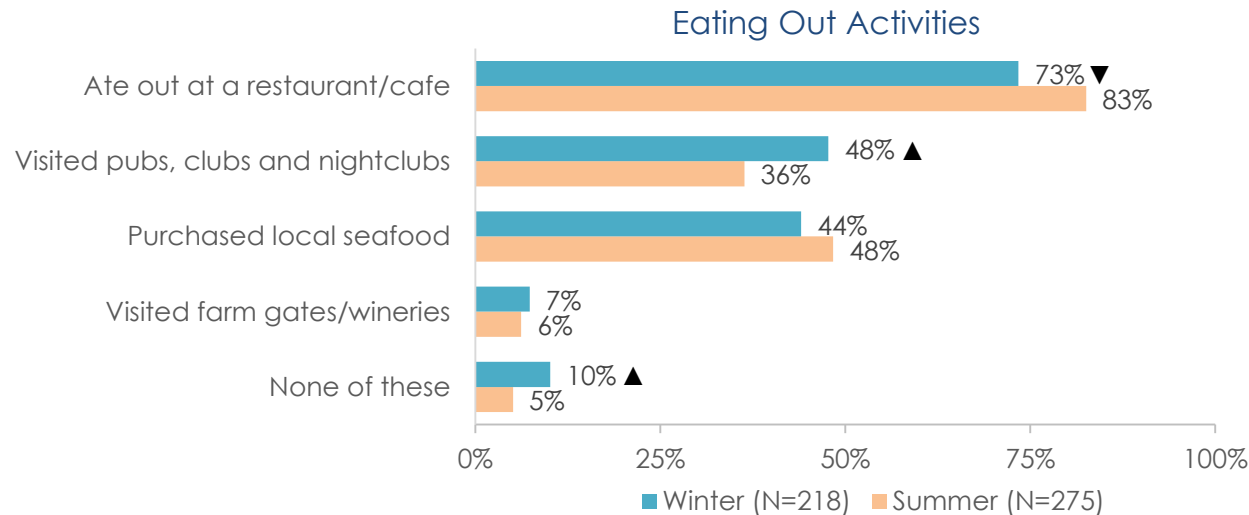
Please see the Appendix A for results by demographics/location of stay

The number of visitors undertaking recreational and leisure activities in winter remained similar to in summer.

'General walks around towns/villages' continues to be the most common recreational/leisure activity, with 77% of visitors undertaking it.

Eating Out Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?



	Age group and season									
	16-34		35-44		45-54		55-64		65+	
	Winter	Summer	Winter	Summer	Winter	Summer	Winter	Summer	Winter	Summer
Ate out at a restaurant/cafe	82%	89%	76%	84%	76%	73%	71%	81%	68% ▼	94%
Visited pubs, clubs and nightclubs	32%	33%	52%	32%	43%	39%	36%	37%	68%	56%
Purchased local seafood	54%	39%	44%	52%	46%	56%	45%	40%	37% ▼	75%
Visited farm gates/wineries	7%	7%	16%	7%	14%	3%	2%	4%	7%	19%
None of these	11%	5%	12%	3%	5%	7%	11%	8%	12%	0%
Base	28	76	25	69	37	59	66	52	60	16

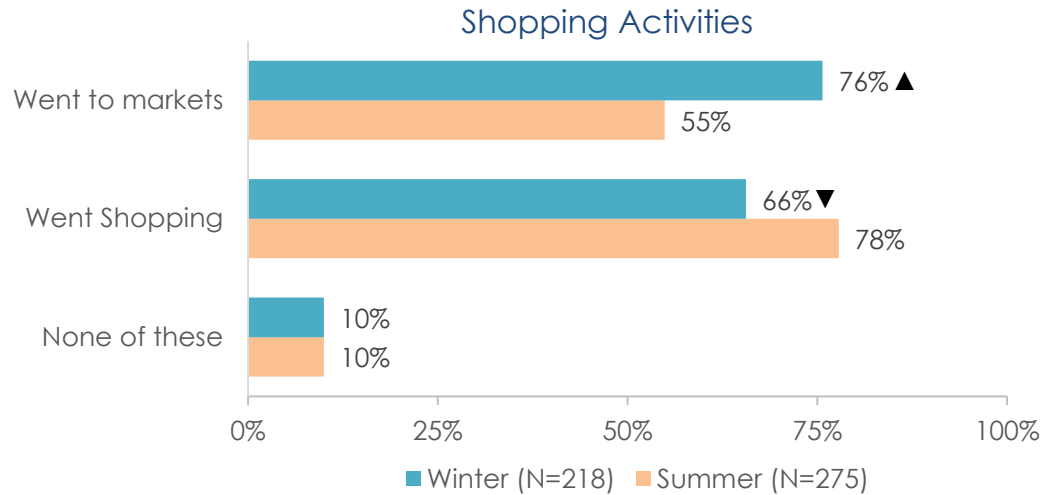
▲ ▼ = Significantly higher/lower percentage (compared to the summer)

Please see the Appendix A for results by demographics/location of stay

Significantly less visitors stated they 'ate out at a restaurant/cafe' in winter, while significantly more 'visited pubs, clubs and nightclubs'. When looking at results by age and season, results have not significantly changed in winter except for those aged 65 and over, the combination of behavioural changes and a larger sample representation of this age group in winter could – at least in part – be responsible for the overall changes seen in eating out activities.

Shopping Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?



	Age group and season									
	16-34		35-44		45-54		55-64		65+	
	Winter	Summer	Winter	Summer	Winter	Summer	Winter	Summer	Winter	Summer
Went to markets	68%▲	39%	80%▲	42%	92%▲	75%	71%	69%	73%	63%
Went Shopping	57%	72%	72%	75%	68%	76%	67%▼	85%	65%▼	100%
None of these	14%	16%	4%	14%	3%	5%	11%	6%	12%	0%
Column n	28	76	25	69	37	59	66	52	60	16

▲▼=Significantly higher/lower percentage (compared to the summer)

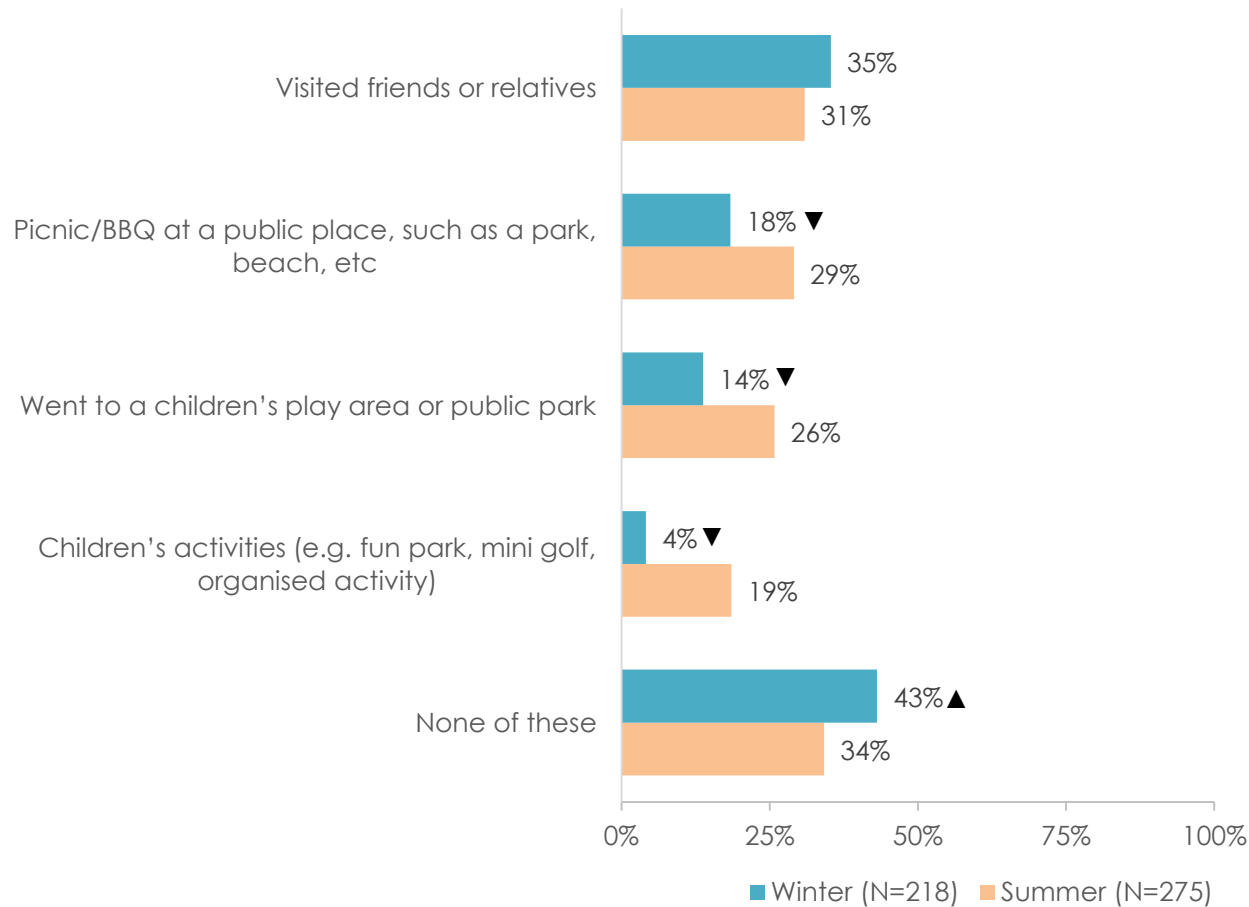
Please see the Appendix A for results by demographics/location of stay

The number of visitors that 'went to markets' significantly increased in winter (note our earlier comment about the possible impact of more markets recruitment), while the number that 'went shopping' significantly decreased.

The number of visitors that 'went to markets' in winter increased for all age groups, increasing significantly for those aged under 55. The number of visitors that 'went shopping' decreased for all age groups, decreasing significantly for those aged 55 and over.

Family Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?



% of those visiting with children	
Winter N = 38	Summer N = 153
34%	32%
24%	38%
45%	41%
16%	27%
29%	20%

▲ ▼ = Significantly higher/lower percentage (compared to the summer)

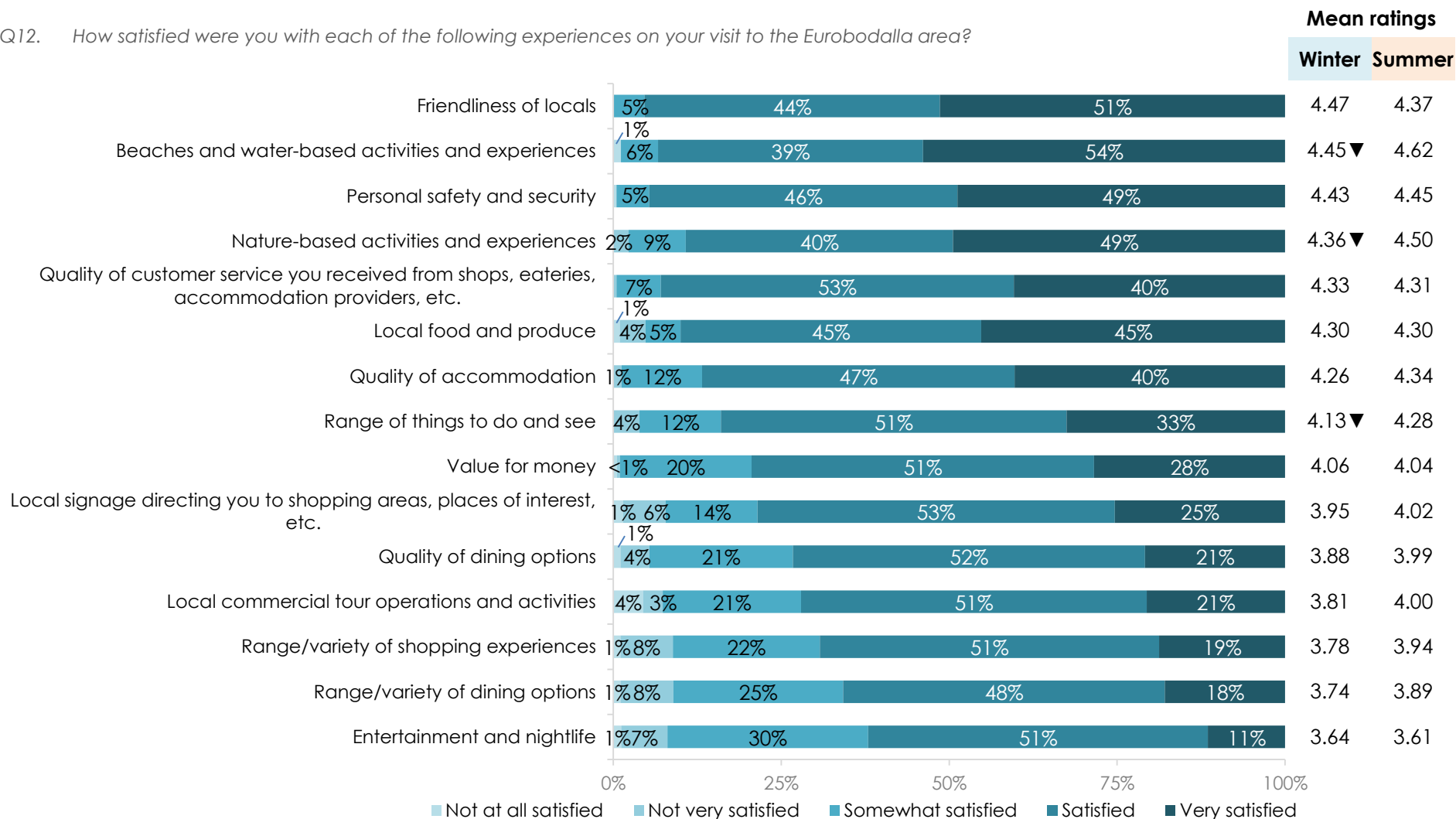
Please see the Appendix A for results by demographics/location of stay

'Visited friends or relatives' remained the most common family activity, with 35% of visitors in winter having done so.

The number of visitors having a 'picnic/BBQ at a public place, such as a park, beach, etc', 'went to a children's play area or public park' and 'children's activities' have significantly decreased in winter. A comparison between winter and summer of only those visiting with children, however, found participation in 'went to a children's play area or public park' remained similar (45% cf. 41%), indicating the significant decrease overall is a reflection of the decline in those visiting with children in the sample.

Satisfaction with Specific Experiences

Q12. How satisfied were you with each of the following experiences on your visit to the Eurobodalla area?



▲ ▼ = Significantly higher/lower level of satisfaction (compared to summer)

Scale: 1 = not at all satisfied, 5 = very satisfied
Base: Winter N = 68-216, Summer N = 119-275

In winter, visitors had the highest satisfaction with 'friendliness of locals', 'beaches and water-based activities and experiences' and 'personal safety and security'.

Visitors in winter were significantly less satisfied with 'beaches and water-based activities and experiences', 'nature-based activities and experiences' and 'range of things to do and see', compared to visitors in summer.

Satisfaction with Specific Experiences and the Likelihood to Recommend

Q12. How satisfied were you with each of the following experiences on your visit to the Eurobodalla area?

Q13. How likely are you to recommend a visit to the Eurobodalla area to your friends or relatives?

Specific experience	Likelihood to recommend		Winter Difference (very likely – all others)	Summer Difference (very likely – all others)
	Very likely	All others		
Friendliness of locals	4.52▲	4.31	0.21	0.46
Beaches and water-based activities and experiences	4.53▲	4.15	0.38	0.59
Personal safety and security	4.50▲	4.20	0.30	0.51
Nature-based activities and experiences	4.49▲	3.92	0.57	0.68
Quality of customer service you received from shops, eateries, accommodation providers, etc.	4.38	4.19	0.19	0.46
Local food and produce	4.42▲	3.92	0.50	0.57
Quality of accommodation	4.33▲	4.03	0.30	0.90
Range of things to do and see	4.24▲	3.76	0.48	0.79
Value for money	4.16▲	3.76	0.40	0.58
Local signage directing you to shopping areas, places of interest, etc.	4.10▲	3.47	0.63	0.72
Quality of dining options	3.97▲	3.59	0.38	0.52
Local commercial tour operations and activities	3.88	3.56	0.32	0.96
Range/variety of shopping experiences	3.91▲	3.37	0.54	0.83
Range/variety of dining options	3.86▲	3.36	0.50	0.59
Entertainment and nightlife	3.69	3.50	0.19	0.98

Base: Winter N = 218, Summer N = 275

Scale: 1 = not at all satisfied, 5 = very satisfied

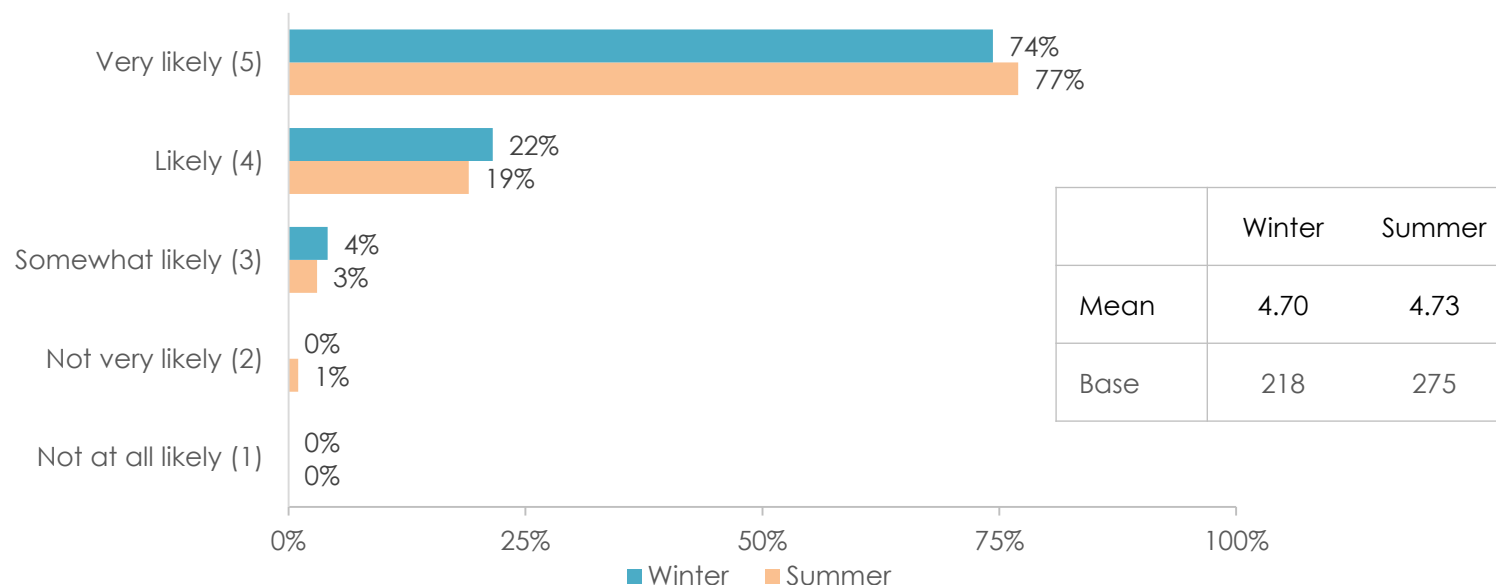
▲▼=Significantly higher/lower level of satisfaction

As was observed in summer, visitors that were 'very likely' to recommend a visit to the Eurobodalla area were more satisfied with all their experiences, with satisfaction being significantly higher for all but 3 experiences.

The largest differences for winter visitors were for 'local signage directing you to shopping areas, places of interest, etc.', 'nature-based activities and experiences' and 'range/variety of dining options', suggesting that improving satisfaction with these experiences can have greater impact of increasing visitors likelihood to recommend the Eurobodalla area.

Likelihood of Recommending Eurobodalla

Q13. How likely are you to recommend a visit to the Eurobodalla area to your friends or relatives?



	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
Mean	4.68	4.72	4.46▼	4.68	4.78	4.73	4.71	4.69	4.68	4.70	4.92▲
Base	71	145	28	25	37	126	140	93	114	53	26

Scale: 1 = not at all likely, 5 = very likely

▲ ▼ = Significantly higher/lower level of satisfaction (by group)

All winter visitors stated they were at least 'somewhat likely' to recommend Eurobodalla to friends or relatives, with overall likelihood remaining on par with summer.

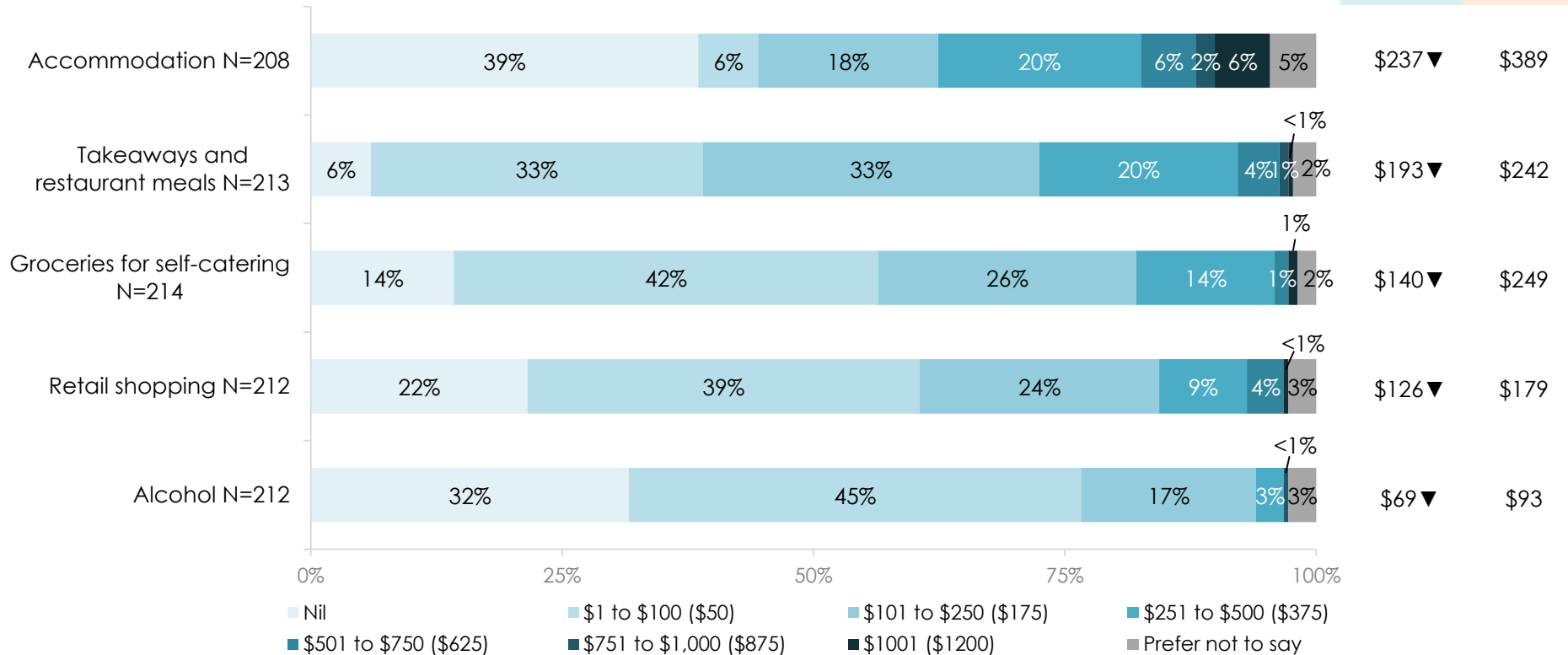
Visitors who stayed 8 or more nights were significantly more likely to recommend Eurobodalla and those aged 16-34 were significantly less likely.

Money Spent During the Visit

Average amount spent

Winter Summer

Q22. During your visit to the Eurobodalla area, how much do you estimate that you (and the group you were travelling with) have spent on each of the following items?



	Average total spend	Average nights stayed	Average spend/night
Winter	\$765	4.6	\$166
Summer	\$1152	6.8	\$169

Base: Summer N = 259-268

Means and bases (N) exclude those who said 'prefer not to say'

▲ ▼ = Significantly higher/lower (compared to summer)

Note: Q22 has had a wording change to include '(and the group you are travelling with)'

Visitors in winter spent significantly less on all items – even though the question was tightened up to ensure respondents based their answers on their group's spend (which could have been expected to generate higher spend estimates). However, the decline is reflective – at least in part – of the significant decline in the average number of nights stayed in Eurobodalla for winter visitors, when looking at the average total spend per night, it is almost identical in winter compared to summer (\$166/night cf. \$169/night).

Money Spent During the Visit

Q22. During your visit to the Eurobodalla area, how much do you estimate that you (and the group you were travelling with) have spent on each of the following items?

Length of stay	Accommodation	Takeaways and restaurant meals	Groceries for self-catering	Retail shopping	Alcohol
1-3 nights	\$240	\$178 ▼	\$106 ▼	\$86 ▼	\$63 ▼
4 to 7 nights	\$286	\$243	\$180	\$164	\$93
8+ nights	\$350	\$262	\$308 ▲	\$227 ▲	\$103

Spending area	Length of stay	\$Nil	\$1 to \$100	\$101 to \$250	\$251 to \$500	\$501 to \$750	\$751 to \$1,000	\$1,001+
Accommodation	1-3 nights	32%	9%	23%	26%	5%	2%	5%
	4-7 nights	36%	2%	22%	22%	8%	2%	8%
	8+ nights	39%	4%	13%	13%	13%	4%	13%
Takeaways and restaurant meals	1-3 nights	34%	7%	21%	23%	7%	2%	7%
	4-7 nights	4%	37% ▲	34%	23%	1% ▼	1%	0%
	8+ nights	8%	19% ▼	40%	23%	6%	2%	2%
Groceries for self-catering	1-3 nights	0%	28%	36%	16%	20% ▲	0%	0%
	4-7 nights	5%	31%	36%	22%	5%	1%	1%
	8+ nights	13% ▲	54% ▲	23% ▼	9% ▼	1%	0%	0%
Retail shopping	1-3 nights	0% ▼	37%	46% ▲	15%	0%	0%	2%
	4-7 nights	4%	20% ▼	20%	44% ▲	8% ▲	0%	4%
	8+ nights	8%	45%	29%	15%	2%	0%	1%
Alcohol	1-3 nights	24% ▲	47%	22%	6% ▼	0% ▼	0%	0%
	4-7 nights	18%	37%	27%	10%	6%	0%	2%
	8+ nights	0% ▼	32%	32%	28% ▲	8%	0%	0%

▲ ▼ = Significantly higher/lower (amount spent)

As was observed in the summer, those who spent 1-3 nights in Eurobodalla spent considerably less money overall than those who stayed 8 or more nights.

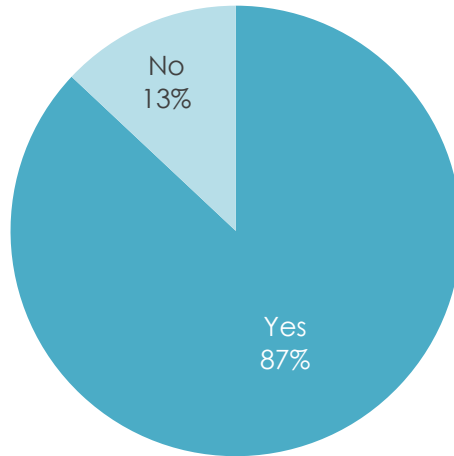
Findings in Detail:

3. Travel Planning



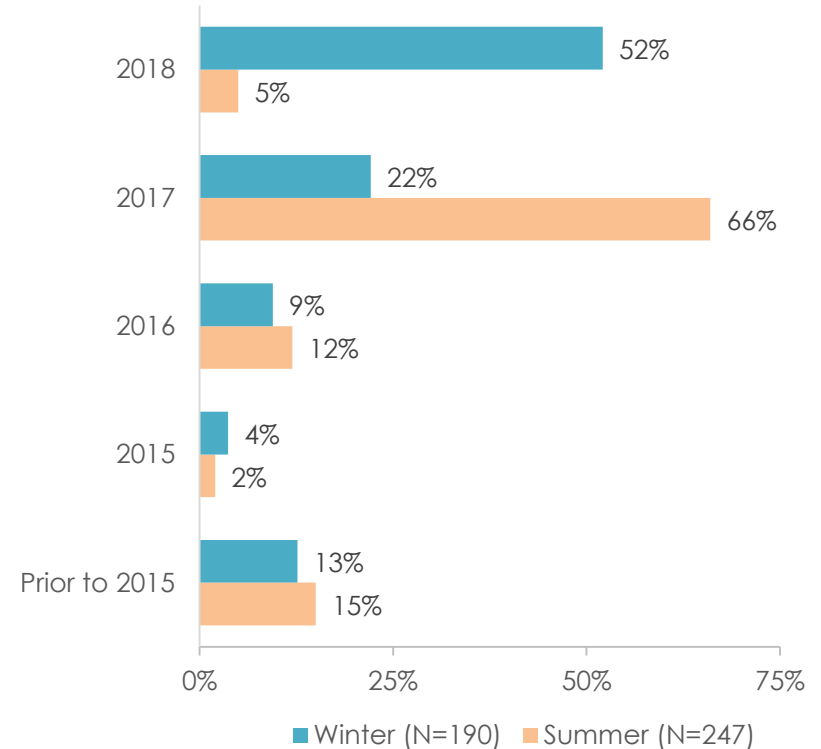
Previous Visits to the Area

Q15. Apart from your most recent trip, have you visited the Eurobodalla area before?



	Winter (N=218)	Summer (N=275)
Yes	87%	90%
No	13%	10%

Q16. Apart from your most recent trip, when was the last trip to the area?

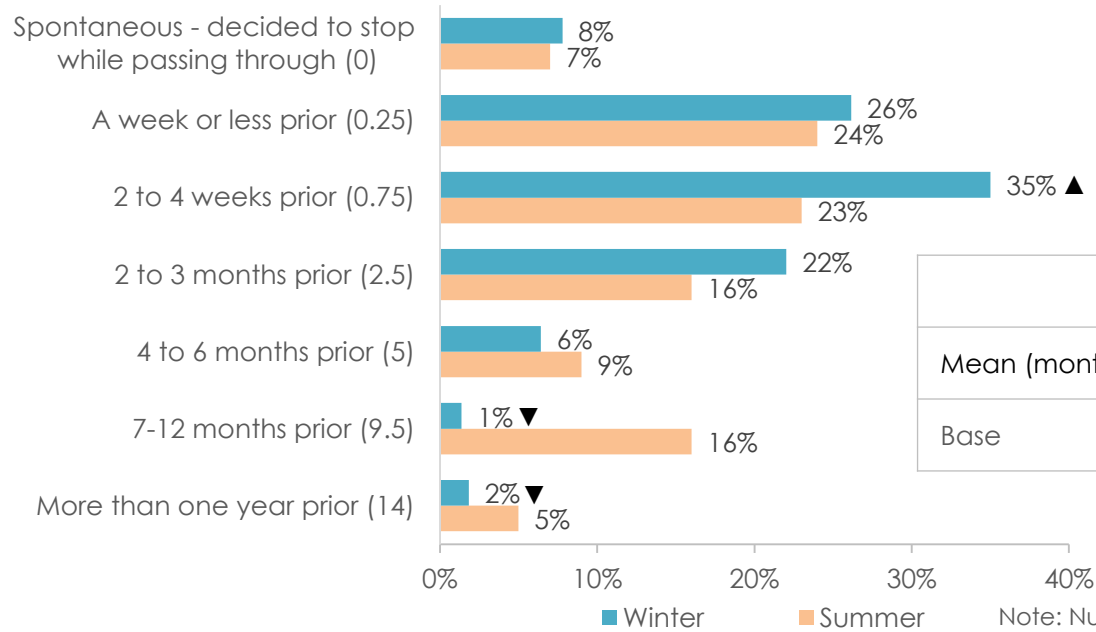


Note: summer research was conducted in early 2018 and therefore comparisons in Q16 should be made at an interest level only

87% of visitors in winter had previously visited Eurobodalla, on par with summer visitors (90%). Of those who have visited before, over half (52%) had visited earlier in 2018, suggesting a relatively short gap between visits.

Prior Planning

Q14. When did you make your decision to visit the Eurobodalla area for your current visit?



	Winter	Summer
Mean (months prior)	1.6 ▼	3.4
Base	218	275

	Total	Holiday	Visiting friends and relatives	Stop-over	Daytrip visit
Spontaneous	8%	5% ▼	2%	21% ▲	32% ▲
A week or less prior	26%	26%	16%	29%	48% ▲
2-4 weeks prior	34%	35%	44%	14%	20%
More than 2 months prior	32%	34%	38%	36%	0% ▼
Mean (months prior)	1.6	1.7	1.9	1.8	0.3 ▼
Base	218	140	55	14	25

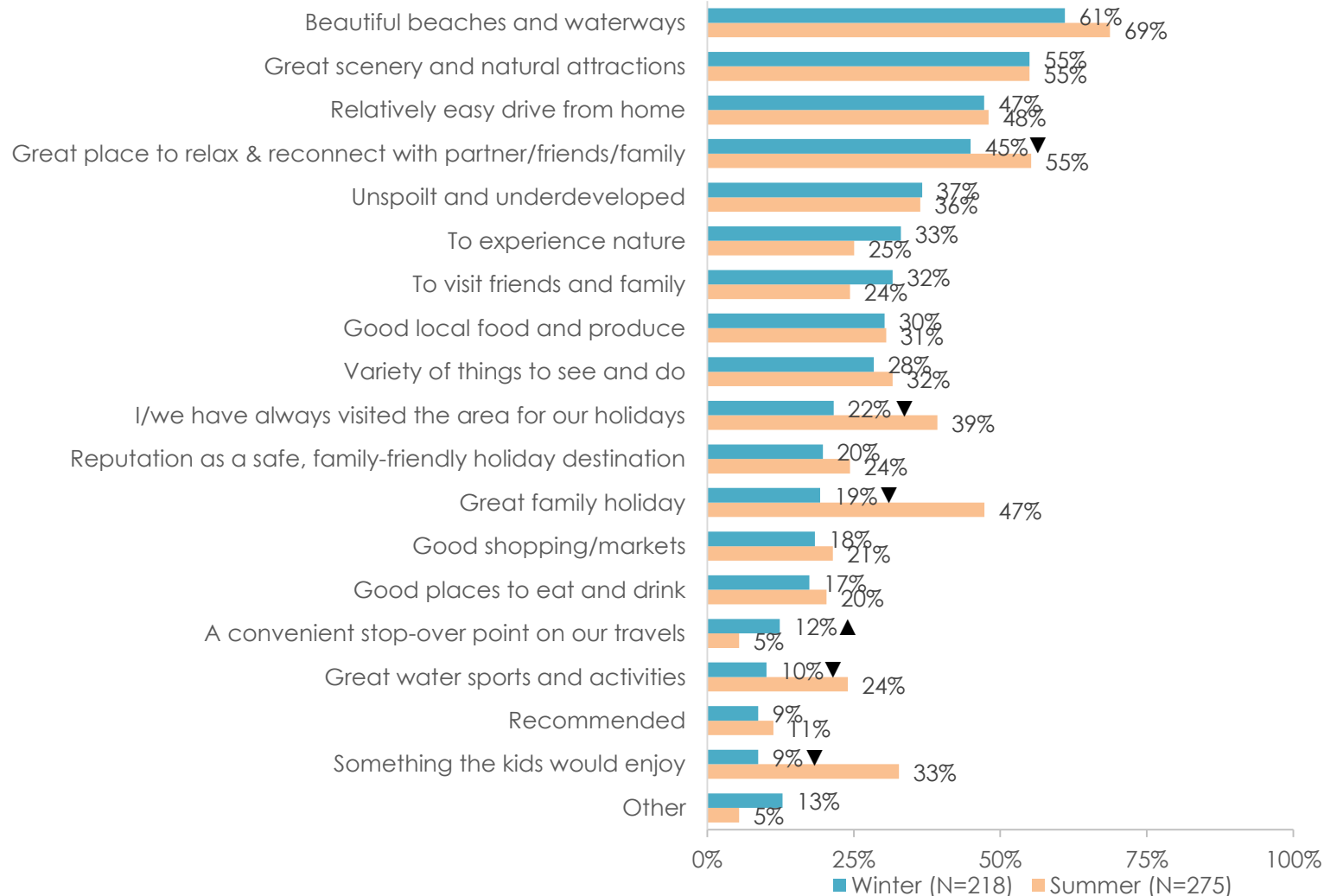
▲ ▼ = Significantly higher/lower percentage

On average, winter visitors decided to visit Eurobodalla 1.6 months before travelling there, significantly less planning time than for summer visitors (3.4 months), the main difference driving this is that winter visitors were significantly less likely to decide to visit Eurobodalla 7 or more months in advance (3% cf. 21%).

Average planning times were similar across those visiting for 'holiday', 'visiting friends and relatives' and 'stop-over', while perhaps not surprisingly daytrip visitors had significantly lower planning time.

Choosing Eurobodalla

Q17. Why in particular did you choose to visit the Eurobodalla region?



Please see the Appendix A for results by location of stay and 'other' specified

Winter visitors top 2 reasons for choosing to visit Eurobodalla were 'beautiful beaches and waterways' (61%) and 'great scenery and natural attractions' (55%).

The number of visitors stating 'Great place to relax & reconnect with partner/friends/family', 'I/we have always visited the area for our holidays', 'great family holiday', 'great water sports and activities' and 'something the kids would enjoy' as reasons to visit Eurobodalla significantly decreased in winter, while those stating 'a convenient stop-over point on our travels' significantly increased.

Choosing Eurobodalla and Satisfaction with Experiences

Q12. How satisfied were you with each of the following experiences on your visit to the Eurobodalla area?
Q17. Why in particular did you choose to visit the Eurobodalla region?

Q17: Why Visitors chose to visit the Eurobodalla region

Q12: How satisfied they were with experiences

	Natural aspects (beaches, natural attractions, etc)**	Visit friends and family/ relaxing/family holiday**	Variety of activ- ities**	Food and shopp- ing**	Relatively easy drive from home	Recomm- ended	A convenient stop-over	Other	Base
Beaches and water-based activities and experiences	4.51	4.53▲	4.63▲	4.61▲	4.48	4.44	4.30	4.29	180
Nature-based activities and experiences	4.50▲	4.42	4.52▲	4.52▲	4.35	4.36	4.37	4.24	176
Range of things to do and see	4.19▲	4.15	4.35▲	4.36▲	4.09	3.94	4.12	3.91	206
Quality of accommodation	4.31	4.36▲	4.40▲	4.38	4.35	4.53	4.33	4.09	159
Quality of dining options	3.91	3.93	4.07▲	4.14▲	3.92	4.24▲	3.91	3.84	187
Range/variety of dining options	3.76	3.78	3.92▲	3.99▲	3.83	4.00	3.77	3.84	190
Local food and produce	4.29	4.35	4.45▲	4.56▲	4.30	4.42	4.29	4.33	210
Value for money	4.11	4.10	4.21▲	4.27▲	4.11	4.17	4.23	3.96	204

▲▼=Significantly higher/lower level of satisfaction
**First four columns are groupings of several similar statements from Q17 – see Appendix B for full details
Scale: 1 = not at all satisfied, 5 = very satisfied

Visitors that chose to visit Eurobodalla for a 'variety of activities' and 'food and shopping' were significantly more satisfied with the majority of their experiences. Those visiting for 'natural aspects' were significantly more satisfied with 'nature-based activities and experiences' and 'range of things to do and see' and those visiting to 'visit friends and family/relaxing/family holiday' were significantly more satisfied with 'beaches and water based activities and experiences' and 'quality of accommodation'. Those that visited because they were 'recommended' were significantly more satisfied with 'quality of dining options'.

Choosing Eurobodalla and Satisfaction with Experiences Continued

Q12. How satisfied were you with each of the following experiences on your visit to the Eurobodalla area?

Q17. Why in particular did you choose to visit the Eurobodalla region?

Q17: Why Visitors chose to visit the Eurobodalla region

Q12: How satisfied they were with experiences

	Natural aspects (beaches, natural attractions, etc)**	Visit friends and family/ relaxing/family holiday**	Variety of activit- ies**	Food and shopp- ing**	Relatively easy drive from home	Recomm- ended	A convenient stop-over	Other	Base
Friendliness of locals	4.48	4.50	4.55	4.61 ▲	4.50	4.68	4.54	4.48	216
Quality of customer service you received from shops, etc	4.33	4.36	4.35	4.49 ▲	4.34	4.65 ▲	4.46	4.21	213
Personal safety and security	4.48	4.49 ▲	4.51	4.54 ▲	4.53 ▲	4.61	4.38	4.12 ▼	207
Range/variety of shopping experiences	3.80	3.83	3.76	3.95 ▲	3.82	3.78	3.83	3.88	192
Local commercial tour operations and activities	3.94	3.85	4.07 ▲	4.08	3.75	4.25	3.33	2.80 ▼	68
Entertainment and nightlife	3.71	3.68	3.75	3.92 ▲	3.79	3.56	3.64	3.43	87
Local signage directing you to shopping areas, places of interest, etc	3.99	4.07 ▲	4.12 ▲	4.16 ▲	4.07 ▲	4.11	3.84	3.67	205

▲ ▼ = Significantly higher/lower level of satisfaction

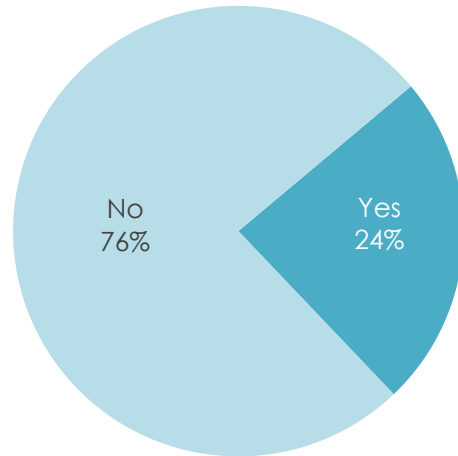
**First four columns are groupings of several similar statements from Q17 – see Appendix B for full details

Scale: 1 = not at all satisfied, 5 = very satisfied

Those who visited to 'visit friends and family/relaxing/family holiday' or because it was a 'relatively easy drive from home' were significantly more satisfied with 'personal safety and security' and 'local signage'. Those who visited for a 'variety of activities' were significantly more satisfied with 'local commercial tour operations and activities' and 'local signage'.

Other Australian Destinations

Q20. Did you consider other Australian destinations for your trip rather than visiting the Eurobodalla area?



	Winter (N=218)	Summer (N=275)
Yes	24%▲	17%
No	76%	83%

▲▼=Significantly higher/lower percentage (compared to summer)

Q21. What other Australian destinations did you consider for your trip?

Response	Count
Sydney	8
Queensland	6
Merimbula	5
South Australia	4
Canberra	3
Eden	3
Gold Coast	3
Huskisson	3
Perth	3
Wollongong	3
Nowhere specific	3

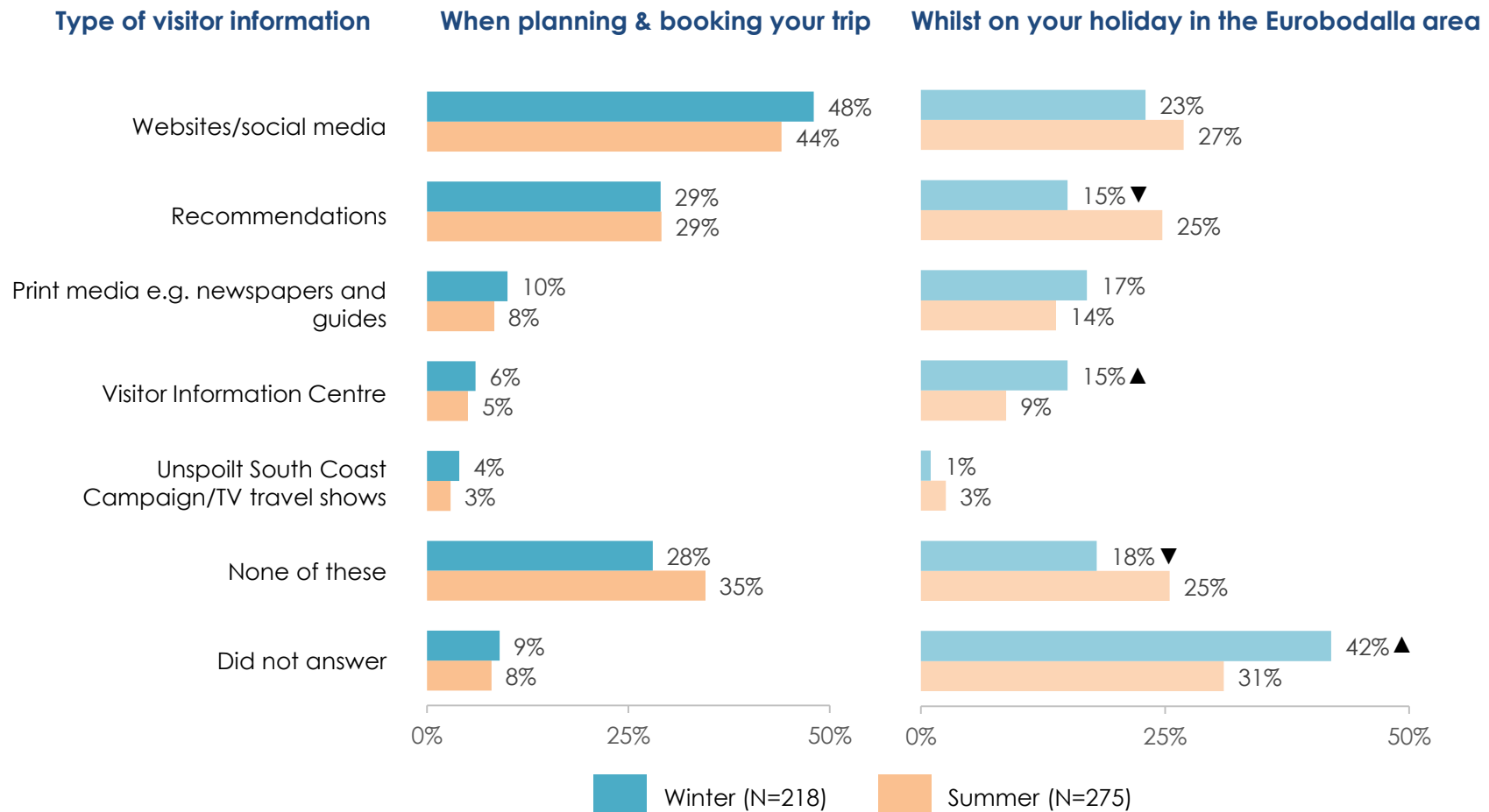
Please see the Appendix for destinations with a count fewer than 3

24% of winter visitors considered other Australian destinations for their trip, significantly more than in summer (17%).

Visitor Information – Summary

Q19. What type of information, if any, did you use to help you plan your visit to the area before and during your trip?

This is a summary – see next slide for detailed results



▲ ▼ = Significantly higher/lower percentage (compared to summer)

See Appendix A for results by location

Almost two thirds of winter visitors (63%) did refer to any information sources prior to their trip – but only 40% did so while in the region. The types of information used by winter visitors when planning & booking their trip was similar to that of summer visitors. However, whilst on holiday in Eurobodalla, winter visitors were significantly more likely to use the ‘visitor information centre’ and significantly less likely to use ‘recommendations’ – this may reflect that some winter visitors were recruited at visitor information centres.

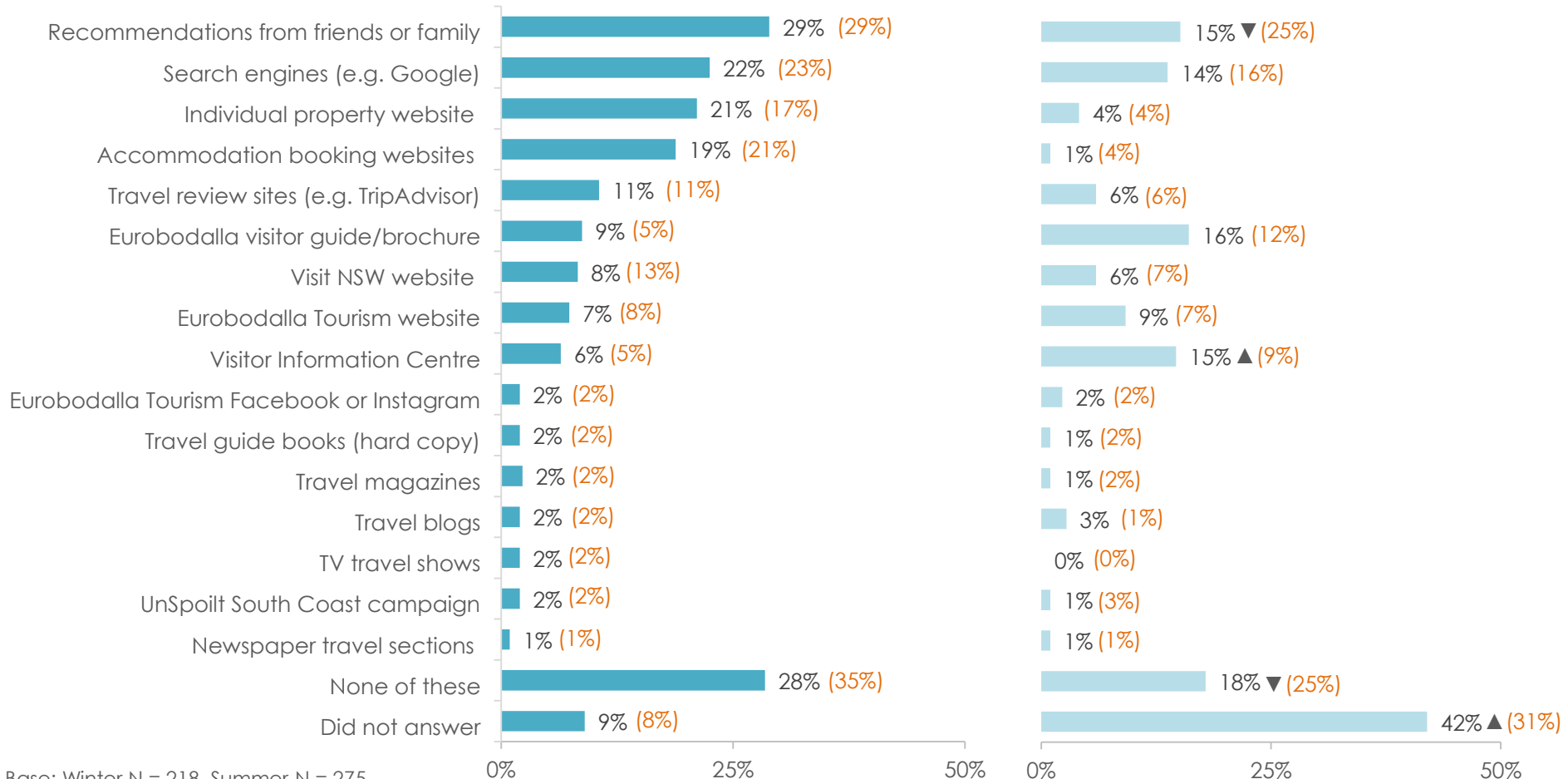
Visitor Information – Detail

Q19. What type of information, if any, did you use to help you plan your visit to the area before and during your trip?

Type of visitor information

When planning & booking your trip

Whilst on your holiday in the Eurobodalla area



Base: Winter N = 218, Summer N = 275

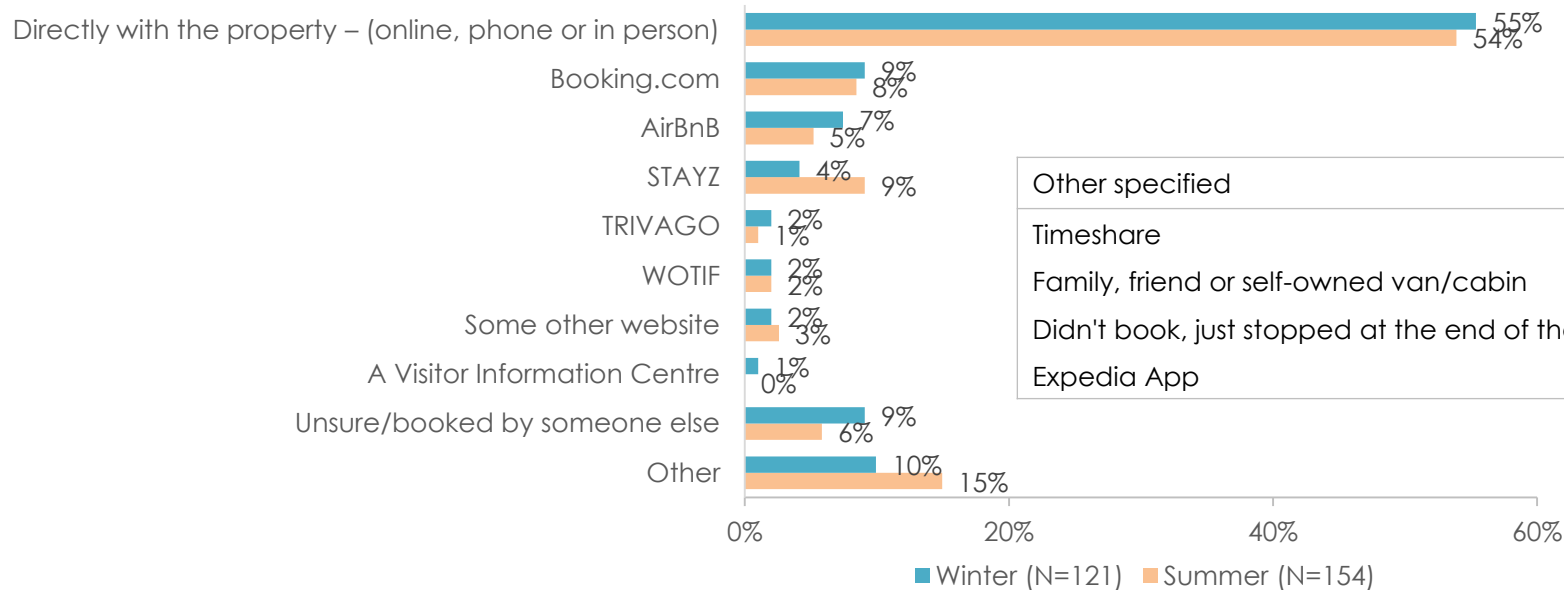
▲▼=Significantly higher/lower percentage (compared to summer)

Percentages in orange brackets are 'summer' results

The profile of resources used by visitors when planning & booking their trip was not significantly different for winter visitors, while the profile of resources visitors used whilst on their holiday differed slightly, with the number of visitors using 'recommendations from friends or family' decreasing significantly and those using the 'visitor information centre' increased significantly (note this may be influenced by recruitment).

Booking Accommodation

Q7. (If NOT 'home of friend/relative' or 'own property'), How did you book your accommodation?



Other specified	Count
Timeshare	6
Family, friend or self-owned van/cabin	4
Didn't book, just stopped at the end of the day	1
Expedia App	1

Accommodation booking by type of accommodation

Booking source	Guesthouse or B&B	Commercial Caravan/ camping	Non-commercial Camping/ Caravan	Rented holiday house/ apartment	Motel/hotel/ resort
Directly with the property	50%	81%▲	57%	19%▼	52%
Booking.com	0%	5%	0%	8%	16%▲
AirBnB	25%	0%▼	0%	27%▲	2%
STAYZ	25%▲	0%	0%	19%▲	0%
TRIVAGO	0%	0%	0%	0%	7%▲
WOTIF	0%	2%	0%	0%	2%
Some other website	0%	2%	0%	0%	2%
Base	4*	43	7*	26	44

▲ ▼ = Significantly higher/lower percentage

*Caution: low base size

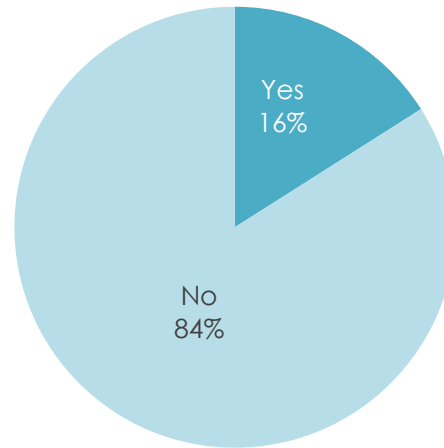
Methods of booking accommodation did not differ significantly between winter and summer.

Over half (52%) of those that didn't stay at their own or a friend/relative's property stated that they booked their accommodation directly with the property.

Those visitors who stayed at 'commercial caravan/camping' were significantly more likely to book 'directly with the property', while those who 'rented holiday house/apartment' were significantly less likely.

“Unspoilt South Coast” Marketing Campaign

Q18. Before today, were you aware of the “Unspoilt South Coast” marketing campaign for the Eurobodalla area?



	Winter (N=218)	Summer (N=275)
Yes	16%	19%
No	84%	81%

	Gender		Age				Usual place of residence				
	Male	Female	16-34	35-44	45-54	55+	Sydney	Regional NSW	Canberra /ACT	Melbourne	Regional VIC
Yes	17%	16%	11%	12%	24%	16%	16%	18%	19%	0%	25%
Base	71	145	28	25	37	126	38	60	68	14	20

16% of visitors were aware of the ‘Unspoilt South Coast’ marketing campaign, with awareness not significantly differing across demographics.

Appendix A: Additional Analysis/ 'Others' Lists

Accommodation in Eurobodalla Shire

Q5. (If NOT 'Daytrip' on Q2), Where did you stay during your visit to the Eurobodalla Shire?

Other specified	Count
Bimbimbie	2
Lilli Pilli	2
Mollymook	2
Surfside	2
Casey's Beach	1
Catalina	1
Denhams Beach	1
Guerilla Bay	1
Kanoona	1
Merimbula	1
Meringo	1
Merry Beach	1
Mogo	1
Murramarang	1
Runnyford	1
Sunshine Bay	1
Ulladulla	1

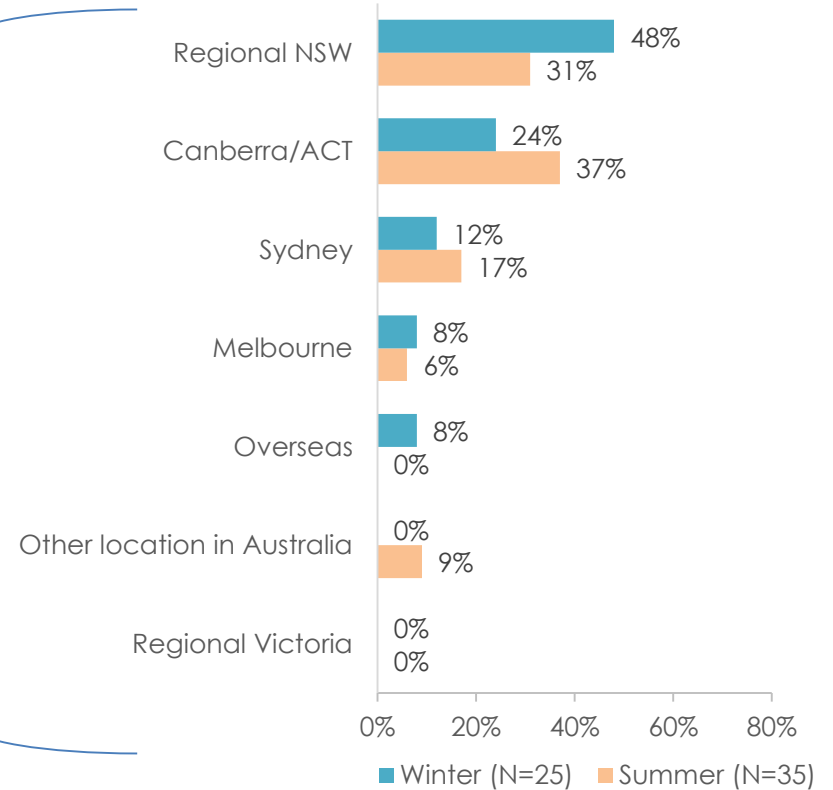
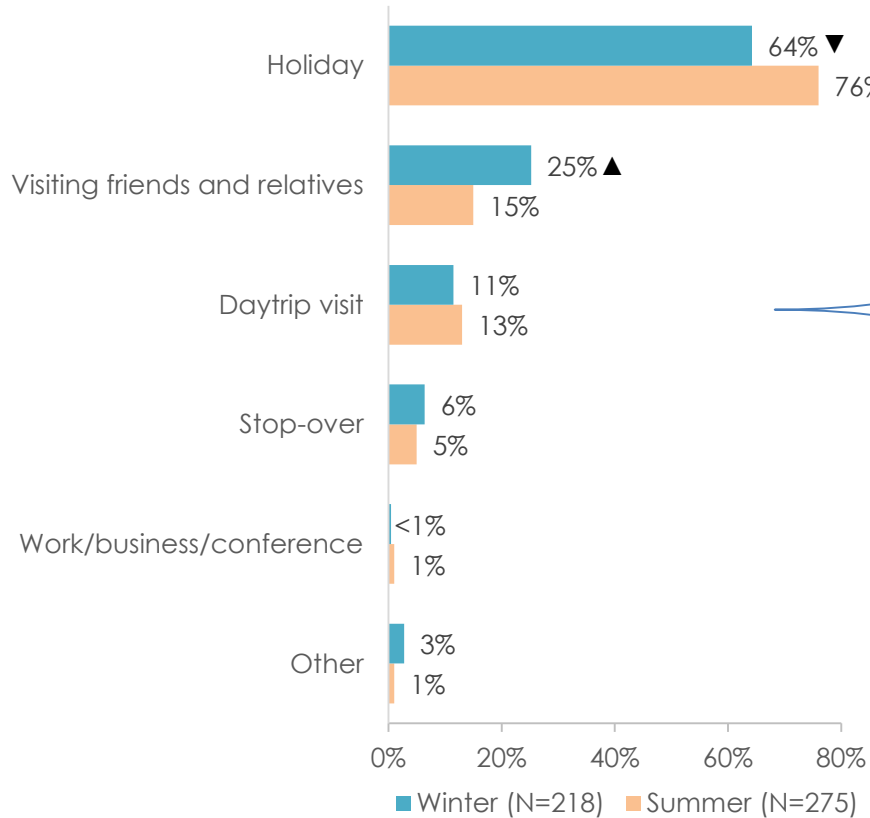


Travelling Details

Q2. Which of the following best describe why you were visiting the Eurobodalla Shire when we intercepted you?

Q28. Where is your usual place of residence?

If daytrip visit in Q2



Improving the Visitor Experience

Q9. What, if anything, could the Eurobodalla Shire Council or tourism operators provide or improve to better meet your needs and expectations when visiting the area?

Response	Winter (N=215)	Summer (N=274)
Better traffic management/improve roads	1%	4%
Free camping/quick stay locations	1%▲	0%
Host walking tour groups/walking maps	1%	0%
Improve internet connections	1%	<1%
Improved/more public transport	1%	1%
More cruises/river boats operating	1%	0%
More dog friendly accommodation and areas	1%	1%
More tourist activities/variety of family activities e.g. kids play areas, bowling, etc.	1%▼	5%
Protect waterways/environment and avoid overdevelopment	1%	1%
4WD driving tracks	<1%	0%
Better weather	<1%	0%
Build on the many unique characteristics the area has to offer	<1%	0%
Council to support art/sculptures in the area	<1%	0%
Enforce alcohol restrictions in public places	<1%	0%
Enforce dog control rules on beaches	<1%	1%
Establish a heated indoor swimming pool	<1%	0%
Extend the checkout times for accommodation	<1%	0%
Extra rubbish bins/recycling options	<1%	1%
Free parking	<1%	0%
Free Wi-Fi	<1%	0%
Improving camping - more availability/guards/hot showers	<1%	1%
Issue warnings when there is construction occurring during your stay	<1%	0%
Maintain current standards/cleanliness	<1%	0%
Make the area more vibrant and up-to-date	<1%	1%
More BBQ and picnic areas/drinking stations	<1%	1%
More public toilet block/soap in public toilets	<1%	2%
New bridge over the Clyde	<1%	0%
Preserve historical buildings and sites	<1%	<1%
Provide cheaper accommodation/providers to be more honest	<1%	1%

▲▼ = A significantly higher/lower percentage (compared to summer)



Water-Based Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
Went to the beach/lakes waterways	85%	73%	71%	84%	78%	75%	84%	66%	76%	87%	92%
Went fishing (excluding fishing charter)	11%	15%	14%	20%	16%	12%	16%	10%	13%	15%	27%
Went on a sightseeing, fishing or dinner boat charter/cruise	11%	8%	4%	16%	8%	8%	11%	4%	7%	15%	12%
Boating/sailing/kayaking /windsurfing etc – using craft you/your family/friends brought	4%	5%	4%	0%	8%	5%	4%	8%	1%	6%	23%
Water activity/sport, such as diving, surfing, jet skiing	6%	3%	11%	4%	5%	1%	4%	4%	4%	2%	8%
Hired a boat, paddle board, kayak, windsurfer, or other watercraft	1%	4%	11%	4%	5%	1%	5%	0%	3%	8%	0%
None of these	13%	26%	29%	12%	19%	23%	14%	33%	21%	11%	8%
Base	71	145	28	25	37	126	140	93	114	53	26

Significantly higher/lower percentage by group



Water-Based Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Location of stay		
	South	Central	North
Went to the beach/lakes waterways	87%	86%	80%
Went fishing (excluding fishing charter)	20%	14%	15%
Went on a sightseeing, fishing or dinner boat charter/cruise	15%	7%	9%
Boating/sailing/kayaking/windsurfing etc – using craft you/your family/friends brought	2%	7%	5%
Water activity/sport, such as diving, surfing, jet skiing	4%	4%	4%
Hired a boat, paddle board, kayak, windsurfer, or other watercraft	7%	7%	4%
None of these	11%	14%	18%
Base	46	28	134



Sightseeing Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
Went for a scenic drive (not an organized tour)	73%	71%	64%	76%	76%	71%	76%	66%	69%	74%	92%
Visited any villages, such as Bodalla, Mogo, Nelligen, Tilba	68%	66%	61%	72%	65%	68%	72%	59%	62%	79%	85%
Visited a National Park or State Forest	45%	37%	36%	40%	38%	40%	44%	37%	31%	49%	77%
Daytrips to other places outside the Eurobodalla Shire	35%	32%	39%	20%	27%	36%	36%	31%	26%	40%	69%
Visited art galleries/craft studios/museums	21%	23%	21%	20%	30%	21%	25%	18%	19%	25%	50%
Visited historical sites	18%	17%	4%	36%	19%	16%	21%	10%	11%	23%	42%
Visited Mogo Zoo	13%	19%	18%	16%	11%	18%	21%	11%	11%	26%	35%
Visited an Aboriginal site	7%	10%	7%	12%	8%	8%	9%	8%	5%	9%	31%
Went on a Montague Island tour	4%	3%	0%	4%	0%	5%	4%	2%	2%	4%	12%
Went on any other organised tour	3%	0%	0%	0%	3%	1%	1%	1%	0%	2%	4%
None of these	8%	8%	7%	4%	5%	10%	6%	11%	11%	4%	0%
Base	71	145	28	25	37	126	140	93	114	53	26

Significantly higher/lower percentage by group



Sightseeing Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Location of stay		
	South	Central	North
Went for a scenic drive (not an organized tour)	78%	71%	72%
Visited any villages, such as Bodalla, Mogo, Nelligen, Tilba	76%	46%	72%
Visited a National Park or State Forest	43%	46%	41%
Daytrips to other places outside the Eurobodalla Shire	57%	29%	33%
Visited art galleries/craft studios/museums	37%	11%	23%
Visited historical sites	24%	25%	17%
Visited Mogo Zoo	20%	14%	20%
Visited an Aboriginal site	13%	4%	9%
Went on a Montague Island tour	4%	0%	4%
Went on any other organised tour	2%	0%	1%
None of these	0%	14%	8%
Column Population	46	28	134

Significantly higher/lower percentage by location



Recreational/Leisure Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
General walks around towns/villages	76%	78%	68%	88%	86%	74%	84%	66%	79%	87%	85%
Nature walks, such as tracks, trails bushwalk, coastal walks	59%	47%	46%	48%	57%	50%	56%	45%	46%	58%	77%
Visited the Botanical Gardens	15%	11%	7%	8%	14%	15%	14%	12%	5%	19%	42%
Cycling/mountain biking	11%	8%	7%	8%	8%	10%	11%	4%	7%	9%	19%
Recreational sport, such as bowls, golf, tennis	7%	8%	7%	12%	3%	8%	8%	9%	9%	4%	15%
Adventure activity (e.g. sky-diving, horse-riding, four wheel driving)	4%	3%	7%	8%	3%	2%	5%	4%	3%	4%	8%
Visited a spa, well-being centre	3%	1%	7%	0%	0%	1%	1%	2%	0%	2%	8%
None of these	10%	13%	21%	4%	8%	13%	6%	22%	11%	4%	0%
Base	71	145	28	25	37	126	140	93	114	53	26

Significantly higher/lower percentage by group



Recreational/Leisure Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Location of stay		
	South	Central	North
General walks around towns/villages	87%	86%	81%
Nature walks, such as tracks, trails bushwalk, coastal walks	46%	61%	57%
Visited the Botanical Gardens	9%	4%	17%
Cycling/mountain biking	15%	7%	9%
Recreational sport, such as bowls, golf, tennis	11%	7%	7%
Adventure activity (e.g. sky-diving, horse-riding, four wheel driving)	4%	4%	3%
Visited a spa, well-being centre	2%	0%	1%
None of these	7%	4%	8%
Base	46	28	134



Eating Out Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
Ate out at a restaurant/cafe	70%	74%	82%	76%	76%	70%	74%	72%	71%	75%	85%
Visited pubs, clubs and nightclubs	56%	43%	32%	52%	43%	52%	51%	44%	46%	60%	58%
Purchased local seafood	45%	43%	54%	44%	46%	41%	51%	35%	42%	51%	65%
Visited farm gates/wineries	1%	10%	7%	16%	14%	4%	11%	3%	4%	9%	19%
None of these	7%	12%	11%	12%	5%	11%	6%	15%	10%	8%	0%
Base	71	145	28	25	37	126	140	93	114	53	26

Significantly higher/lower percentage by group



Eating Out Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Location of stay		
	South	Central	North
Ate out at a restaurant/cafe	76%	68%	76%
Visited pubs, clubs and nightclubs	57%	46%	49%
Purchased local seafood	48%	39%	51%
Visited farm gates/wineries	20%	4%	7%
None of these	4%	7%	8%
Base	46	28	134

Significantly higher/lower percentage by location



Shopping Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
Went to markets	68%	80%	68%	80%	92%	72%	79%	71%	77%	77%	85%
Went Shopping	68%	65%	57%	72%	68%	66%	72%	59%	57%	83%	92%
None of these	11%	8%	14%	4%	3%	11%	6%	14%	10%	4%	0%
Base	71	145	28	25	37	126	140	93	114	53	26

Significantly higher/lower percentage by group



Shopping Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Location of stay		
	South	Central	North
Went to markets	67%	82%	81%
Went Shopping	65%	64%	74%
None of these	11%	4%	6%
Base	46	28	134

Significantly higher/lower percentage by location



Family Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Gender		Age				Reason for visiting		Length of stay		
	Male	Female	16-34	35-44	45-54	55+	Holiday	Other	1-3 nights	4-7 nights	8+ nights
Visited friends or relatives	34%	36%	46%	24%	30%	37%	24%	58%	32%	47%	54%
Picnic/BBQ at a public place, such as a park, beach, etc	15%	19%	11%	24%	22%	17%	21%	15%	14%	21%	35%
Went to a children's play area or public park	11%	15%	18%	36%	8%	10%	15%	11%	10%	19%	19%
Children's activities (e.g. fun park, mini golf, organised activity)	4%	4%	4%	16%	0%	3%	5%	2%	4%	6%	4%
None of these	46%	41%	36%	36%	54%	44%	51%	27%	52%	30%	15%
Base	71	145	28	25	37	126	140	93	114	53	26

Significantly higher/lower percentage by group



Family Activities

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla?

Activity	Location of stay		
	South	Central	North
Visited friends or relatives	37%	39%	37%
Picnic/BBQ at a public place, such as a park, beach, etc	33%	21%	16%
Went to a children's play area or public park	15%	11%	16%
Children's activities (e.g. fun park, mini golf, organised activity)	7%	7%	4%
None of these	33%	39%	44%
Base	46	28	134

Significantly higher/lower percentage by location



Choosing Eurobodalla

Q17. Why in particular did you choose to visit the Eurobodalla region?

	Location of stay		
	South	Central	North
Beautiful beaches and waterways	72%	64%	66%
Great scenery and natural attractions	70%	61%	56%
Relatively easy drive from home	39%	36%	55%
Great place to relax & reconnect with partner/friends/family	46%	43%	52%
Unspoilt and underdeveloped	43%	39%	38%
To experience nature	39%	36%	34%
To visit friends and family	35%	32%	32%
Good local food and produce	35%	32%	34%
Variety of things to see and do	43%	21%	28%
I/we have always visited the area for our holidays	22%	14%	28%
Reputation as a safe, family-friendly holiday destination	24%	18%	24%
Great family holiday	28%	25%	21%
Good shopping/markets	13%	18%	19%
Good places to eat and drink	24%	18%	20%
A convenient stop-over point on our travels	13%	18%	10%
Great water sports and activities	13%	11%	11%
Something the kids would enjoy	15%	11%	10%
Recommended	13%	11%	10%
Other	9%	14%	15%
Base	46	28	134

Significantly higher/lower percentage by location



Choosing Eurobodalla

Q17. Why in particular did you choose to visit the Eurobodalla region?

Other specified	Count
Holiday home	5
We haven't been here before/somewhere different	4
Friends birthday	2
Tennis tournament	2
Wedding	2
Bowls tournament	1
Excellent accommodation offer	1
Given the opportunity from friends	1
Good place to cycle	1
Nice people	1
Picked it randomly	1
Quiet and relaxing	1
Regularly visit and own a unit	1
Surfing	1
There was a rally event in the nearby forest	1
Timeshare resort	1
Visited previously for work	1
Warmer weather	1
Wedding anniversary	1



Visitor Information

Q19. What type of information, if any, did you use to help you plan your visit to the area before and during your trip?

	When planning & booking your trip			Whilst on your holiday in the Eurobodalla Area		
	South	Central	North	South	Central	North
Websites/social media	41%	46%	58%	22%	14%	29%
Recommendations	41%	32%	30%	9%	11%	16%
Print media e.g. newspapers and guides	13%	7%	13%	20%	11%	22%
Visitor Information Centre	13%	11%	7%	17%	11%	16%
Unspoilt South Coast Campaign/TV travel shows	7%	7%	4%	0%	4%	1%
None of these	28%	29%	23%	24%	25%	13%

Base: N = 193

Significantly higher/lower percentage by location



Other Australian Destinations

Q21. What other Australian destinations did you consider for your trip?

Destination	Count	Destination	Count
Brisbane	2	Kangaroo Valley	1
Central Australia	2	Lake Tabourie	1
Jervis Bay	2	Lightning Ridge	1
Kiama	2	Merry Beach	1
Mallacoota	2	Mudgee	1
Noosa	2	Murray River	1
NSW North Coast	2	Nelson bay	1
Port Macquarie	2	North East QLD	1
Victoria	2	North Haven	1
Adelaide	1	North NSW	1
Armidale	1	Nowra	1
Batemans Bay	1	Port Stephens	1
Bega Valley	1	QLD South Coast	1
Blue Mountains	1	Seal Rocks	1
Byron Bay	1	Shoalhaven	1
Cairns	1	Snowy Mountains	1
Darwin	1	Sunshine Coast	1
Everywhere	1	Sussex Inlet	1
Great Ocean Road	1	Tasmania	1
Hinterland	1	Ulladulla	1
Illawarra	1	Ullara	1
Inland NSW	1	Did not respond	1



Appendix B: Q17 Groupings



Q17 Groupings

- “Natural aspects (beaches, natural attractions, etc)”: ‘Beautiful beaches and waterways’, ‘To experience nature’, ‘Great scenery and natural attractions’, ‘Unspoilt and under-developed’
- “Visit friends and family/relaxing/family holiday”: ‘I/we have always visited the area for our holidays’, ‘Great family holiday’, ‘Great place to relax and reconnect with partner/friends/family’, ‘To visit friends and family’, ‘Reputation as a safe, family-friendly holiday destination’
- “Variety of activities”: ‘Variety of things to see and do’, ‘Somethings the kids would enjoy’, ‘Great water-sports and activities’
- “Food and shopping”: ‘Good places to eat and drink’, ‘Good local food and produce’, ‘Good shopping/markets’



Appendix C: The Questionnaire



Eurobodalla Visitor Survey
Winter 2018

Introduction

Thank you for agreeing to complete this important survey about your recent visit to the Eurobodalla Shire.

Please note that your responses to these questions will be treated completely confidentially and the results will only be reported in aggregate form – none of the responses you give are directly linked to you as an individual.

QA. To commence the survey, please enter the unique ID code mentioned in the cover email:

.....

About your visit

Q1. Do you live or work within the Eurobodalla Shire? (Select one option)

- ☐ Yes (Terminate)
☐ No (Continue)

Q2. Which of the following best describe why you were visiting the Eurobodalla Shire when we intercepted you? Please select all that apply (multiple response – responses can be randomised – but 'other' always at the bottom)

- ☐ Holiday
☐ Visiting friends and relatives
☐ Stop-over (travelling to/from another destination)
☐ Daytrip visit (not staying in the Eurobodalla region)
☐ Work/business/conference
☐ Other (please specify).....

If ONLY 'work/business/conference', terminate

Q3. Who else, if anyone, was with you while you were visiting the Eurobodalla Shire? Please select all that apply. (Multiple response)

- ☐ Your spouse/partner
☐ Your children or your partner's children
☐ One or both of your parents
☐ Other relatives or friends aged 16+ years
☐ Other relatives or friends aged under 16 years
☐ Work or business colleagues/associates
☐ No one else, I was travelling alone
☐ Other (please specify).....

Q4. How did you travel to the Eurobodalla Shire from your previous location? (Multiple response)

- ☐ Private car
☐ Hire car
☐ Bus/coach
☐ Air
☐ Other (please specify).....

Q5. (If NOT 'Daytrip' on Q2, ask – otherwise, go to Q9): Where did you stay during your visit to the Eurobodalla Shire? (Multiple response)

- ☐ Batehaven
☐ Batemans Bay
☐ Bodalla
☐ Broulee
☐ Dalmeny
☐ Kianga
☐ Long Beach
☐ Malua Bay
☐ Maruya
☐ Mossy Point
☐ Narooma
☐ Surf Beach
☐ Tilba
☐ Tomakin
☐ Tuross Head
☐ Other (please specify).....

Q6. What type of accommodation did you use during your visit to the Eurobodalla Shire? (Multiple response – responses can be randomised but ‘other’ always at the bottom)

- ☐ Guesthouse or Bed and Breakfast
- ☐ Commercial caravan park or camping ground
- ☐ Non-commercial camping/caravan area (e.g. National Park, private property)
- ☐ Rented holiday house/apartment
- ☐ Home of friend/relative
- ☐ Motel/hotel/resort
- ☐ Own property
- ☐ Other (please specify)

Q7. (If NOT ‘home of friend/relative’ or ‘own property’ on Q6, ask – otherwise, go to Q8): How did you book your accommodation? (Multiple response – do NOT randomise)

- ☐ Directly with the property – either online, over the phone or in person
- ☐ AirBnB
- ☐ STAYZ
- ☐ TRIVAGO
- ☐ WOTIF
- ☐ Booking.com
- ☐ Some other website
- ☐ A Visitor Information Centre
- ☐ Other (please specify)
- ☐ Unsure/booked by someone else

Q8. How many nights in total did you stay in the Eurobodalla Shire? (Select one option)

- ☐ 1 night
- ☐ 2 nights
- ☐ 3 nights
- ☐ 4 to 7 nights
- ☐ 8 to 14 nights
- ☐ 15+ nights

Visitor Experiences

Q9. What, if anything, could the Eurobodalla Shire Council or tourism operators provide or improve to better meet your needs and expectations when visiting the area? Please provide as much detail below as possible. (Open ended question – 200 characters)

.....

Q10. And what, if anything, do you like most about the Eurobodalla region as a place to visit? Please provide as much detail below as possible. (Open ended question – 200 characters)

.....

Programmer: NO back-button after these Qs

Q11. Which, if any, of the following activities did you experience during your visit to Eurobodalla? (Select one or more options – NO rotate or randomise)

Water-based

- ☐ Went to the beach/lakes waterways
- ☐ Water activity/sport, such as diving, surfing, jet skiing
- ☐ Hired a boat, paddle board, kayak, windsurfer, or other watercraft
- ☐ Boating/sailing/kayaking/windsurfing etc – using craft you/your family/friends brought
- ☐ Went on a sightseeing, fishing or dinner boat charter/cruise
- ☐ Went fishing (excluding fishing charter)

Sightseeing

- ☐ Visited a National Park or State Forest
- ☐ Went on a Montague Island tour
- ☐ Went on any other organised tour
- ☐ Visited Mogo Zoo
- ☐ Visited any villages, such as Bodalla, Mogo, Nelligen, Tilba
- ☐ Visited an Aboriginal site, such as Murrumbidgee National Park, Cullendulla Creek Nature Reserve, Hanging Mountain, Gulaga, Bingi Dreaming Track
- ☐ Went for a scenic drive (not an organized tour)
- ☐ Daytrips to other places outside the Eurobodalla Shire, such as Ulladulla, Huskisson, Bermagui, Bega Valley, Canberra, etc
- ☐ Visited historical sites
- ☐ Visited art galleries/craft studios/museums

Recreational/leisure

- ☐ Nature walks, such as tracks, trails bushwalk, coastal walks
- ☐ General walks around towns/villages
- ☐ Cycling/mountain biking
- ☐ Recreational sport, such as bowls, golf, tennis
- ☐ Adventure activity (e.g. skydiving, horse-riding, four wheel driving)
- ☐ Visited a spa, wellbeing centre
- ☐ Visited the Botanical Gardens

Eating out

- ☐ Ate out at a restaurant/cafe
- ☐ Visited farm gates/wineries
- ☐ Purchased local seafood
- ☐ Visited pubs, clubs and nightclubs

Shopping

- ☐ Went to markets
- ☐ Went shopping

Family

- ☐ Visited friends or relatives
- ☐ Children’s activities (e.g. fun park, mini golf, organised activity)
- ☐ Went to a children’s play area or public park
- ☐ Picnic/BBQ at a public place, such as a park, beach, etc

Q12. How satisfied were you with each of the following experiences on your visit to the Eurobodalla area?
Please provide one answer on each row. If you did not experience a particular item, please select 'not applicable' in the last column (Single response per row – experiences can be randomised)

Experiences	Very satisfied	Satisfied	Somewhat satisfied	Not very satisfied	Not at all satisfied	Not applicable
Beaches and water-based activities and experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nature-based activities and experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range of things to do and see	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of dining options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range/variety of dining options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local food and produce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendliness of locals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of customer service you received from shops, eateries, accommodation providers, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal safety and security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range/variety of shopping experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local commercial tour operations and activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entertainment and nightlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local signage directing you to shopping areas, places of interest, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13. How likely are you to recommend a visit to the Eurobodalla area to your friends or relatives?

- ☐ Very likely
☐ Likely
☐ Somewhat likely
☐ Not very likely
☐ Not at all likely

Travel Planning

Q14. When did you make your decision to visit the Eurobodalla area for your current visit? (Select one option)

- ☐ Spontaneous – decided to stop while passing through
☐ A week or less prior to visiting
☐ 2 to 4 weeks prior to visiting
☐ 2 to 3 months prior to visiting
☐ 4 to 6 months prior to visiting
☐ 7 to 12 months prior to visiting
☐ More than one year prior to visiting

Q15. Apart from your most recent trip, have you visited the Eurobodalla area before? (Select one option)

- ☐ Yes
☐ No (Go to Q17)

Q16. Apart from your most recent trip, when was your last trip to the area? (Select one option)

- ☐ 2018
☐ 2017
☐ 2016
☐ 2015
☐ Prior to 2015

Q17. Why in particular did you choose to visit the Eurobodalla region? Please select all that apply. (Multiple response – responses can be randomised – but 'other' always at the bottom)

- ☐ Beautiful beaches and waterways
☐ To experience nature
☐ I/we have always visited the area for our holidays
☐ Great family holiday
☐ Great place to relax & reconnect with partner/friends/family
☐ Great scenery and natural attractions
☐ Relatively easy drive from home
☐ To visit friends and family
☐ Unspoilt and underdeveloped
☐ Variety of things to see and do
☐ Something the kids would enjoy
☐ Great water sports and activities
☐ Reputation as a safe, family-friendly holiday destination
☐ Good places to eat and drink
☐ Good local food and produce
☐ Good shopping/markets
☐ Recommended
☐ A convenient stop-over point on our travels
☐ Other (please specify)

Q18. Before today, were you aware of the "Unspoilt South Coast" marketing campaign for the Eurobodalla area? (Select one option)

- ☐ Yes
☐ No

Q19. What type of information, if any, did you use to help you plan your visit to the area before and during your trip? Please select all that apply in both columns below. (Info types can be randomized, but 'none of these' always at the bottom)

Type of Visitor Information	When planning & booking your trip	Whilst on your holiday in the Eurobodalla Area
Recommendations from friends or family	<input type="radio"/>	<input type="radio"/>
Visit NSW website	<input type="radio"/>	<input type="radio"/>
UnSpilt South Coast campaign	<input type="radio"/>	<input type="radio"/>
Eurobodalla Tourism website	<input type="radio"/>	<input type="radio"/>
Accommodation booking websites (e.g. stayz, booking.com, AirBnB, real estate agent)	<input type="radio"/>	<input type="radio"/>
Individual property website (e.g. motel, resort, holiday park)	<input type="radio"/>	<input type="radio"/>
Travel review sites (e.g. TripAdvisor)	<input type="radio"/>	<input type="radio"/>
Eurobodalla Tourism Facebook or Instagram	<input type="radio"/>	<input type="radio"/>
Travel blogs	<input type="radio"/>	<input type="radio"/>
Search engines (e.g. Google)	<input type="radio"/>	<input type="radio"/>
TV travel shows	<input type="radio"/>	<input type="radio"/>
Visitor Information Centre	<input type="radio"/>	<input type="radio"/>
Eurobodalla visitor guide/brochure	<input type="radio"/>	<input type="radio"/>
Newspaper travel sections	<input type="radio"/>	<input type="radio"/>
Travel magazines	<input type="radio"/>	<input type="radio"/>
Travel guide books (hard copy)	<input type="radio"/>	<input type="radio"/>
None of these	<input type="radio"/>	<input type="radio"/>

Q20. Did you consider other Australian destinations for your trip rather than visiting the Eurobodalla area?

- ☐ Yes
☐ No (Go to Q22)

Q21. What other Australian destinations did you consider for your trip?

- 1.....
2.....
3.....

Q22. During your visit to the Eurobodalla area, how much do you estimate that you (and the group you were travelling with) have spent on each of the following items? (Single response per row)

	SNiI	\$1 to \$100	\$101 to \$250	\$251 to \$500	\$501 to \$750	\$751 to \$1,000	\$1001 +	Prefer not to say
Accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Takeaways and restaurant meals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Groceries for self-catering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alcohol	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retail shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

About You and Your Travel Party

Finally, some questions about you...

Q23. What is your gender?

- ☐ Male
☐ Female
☐ Other
☐ Prefer not to say

Q24. Are you an Australian Resident? (Select one option)

- ☐ Yes
☐ No
☐ Prefer not to say

Q25. What is your age?

- ☐ 16 to 17 years
☐ 18 to 24 years
☐ 25 to 34 years
☐ 35 to 44 years
☐ 45 to 54 years
☐ 55 to 64 years
☐ 65+ years
☐ Prefer not to say

Q26. Recruit location (import from recruitment sheet, not asked)

- ☐ Batehaven
☐ Batemans Bay
☐ Bodalla
☐ Broulee
☐ Dalmeny
☐ Mogo
☐ Moruya
☐ Narooma
☐ Surfbeach
☐ Tilba Tilba
☐ Other

Q27. What is your approximate annual household income from all sources? (Select one option)

- ☐ Less than \$26,000
☐ \$26,000 to \$51,999
☐ \$52,000 to \$103,999
☐ \$104,000 to \$149,999
☐ \$150,000+
☐ Prefer not to say

Q28. Where is your usual place of residence? (Select one option)

- ☐ Sydney
- ☐ Regional NSW (please specify suburb/town name).....
- ☐ Canberra/ACT
- ☐ Melbourne
- ☐ Regional Victoria (please specify suburb/town name).....
- ☐ Other location in Australia (please specify state).....
- ☐ Overseas (Please specify country).....

Q29. Would you like to put your name in the draw to win one of five \$100 Westfield gift vouchers?

- ☐ Yes
- ☐ No (Go to end)

Name:

Best contact phone no:

As part of entering the draw, in ten words or less, please describe your ideal holiday:

.....

Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you provided will be used only for research purposes. This research has been conducted by Micromex Research on behalf of Eurobodalla Shire Council.



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