



Analysis and Report of Mid North Coast Strategic Review Survey August 2009

Executive Summary

With the acceptance of the \$695 000 Demand Building Dollars (to be matched dollar for dollar in the region) in January 2009, Mid North Coast Tourism Inc. has to implement a set of Core Obligations as part of their funding agreement to include addressing the current Governance and Board structure, creating and implementing a 3 year Strategic Plan, address the current Industry Communication model, attend to the current Industry Membership model and assure to implement Supporting TNSW Activities.

Industry input from this report is to assist the RTO conduct its Strategic planning for the next three years and address each of the obligations listed above directly or indirectly. The results from the survey will also aid in determining how to best implement Demand Building Dollars in the calendar years 2010 and 2011.

As part of the three year Strategic Plan, a one year Tourism Development and Marketing Action Plan (TDMAP) must also be created and set out specific development and marketing initiatives for the RTO – guiding the RTO's roles and activities.

It was found from the 176 industry responses, that currently only 11.2% stated that they get involved in joint venture marketing with their Council or LTA. 24.6% of industry said that they did not participate in Stage one DBD, with 58 of 107 responses stating that they were not aware of the DBD Campaign/joint venture opportunity. 59.1% of responses believe that the RTO should do one large integrated campaign with 50% of DBD in 2010 being accessed for the promotion of the Pacific Coast Touring Route. The industry responses stated that they believe the RTO's most important role should be coordinating Regional Marketing Campaigns followed by representing the region at Domestic Consumer and Trade shows. 72.2% of industry stated that they believe consumers identify with the Mid North Coast NSW as the region and 27.8% said that they believe consumers identify with the North Coast of NSW brand.

Findings in this report will assist the Board and the Regional Partnership Program Group (Board Members and LTA representatives) in their decision making process and allow for industry input to be the foundation of a Strategic plan, ensuring the right path for the future of regional and local tourism and its stakeholders across the Mid North Coast.

1.0 Introduction:

This report is based on the data collected from the Mid North Coast Tourism Strategic Review survey distributed to industry operators through Local Tourism Partners between the period of the 20 July until 17 August 2009.

The survey asks industry if they participate regularly in Joint Venture Marketing and if they had participated in the 2009 Stage One Demand Building Dollars program, and, if they hadn't, why. For those who did participate, the survey extends to find out if they were satisfied with their participative results and if they would participate again.

The secondary purpose of the survey was to identify what the industry determined as important strategic marketing activities needed for the improvement and use of industry and how they perceived the brand and assets of the Mid North Coast.

The findings are organised into the following sections:

- Methodology
- Sample
- Detailed Findings
- Results at a glance and suggestions

2.0 Methodology:

The data collection instrument is an online survey which distributed to industry members through LGA/LTA industry members' databases.

The survey consists of 16 questions. The questions has a mixture of scaling design to include simple category answers, multiple choice single response scale, multiple choice multiple response scale and a Likert summated rating scale. The questions recorded the participant's local area, tourism business type and amount of funds available for marketing per annum. Open ended questions to include Question 10 determined why industry did not participate in the stage one Demand Building Program and Question 15 asked participants' to assist identify the region's competitive destination positioning by establishing the top five (5) attributes and appeals of the Mid North Coast.

The final Question 16 is deliberately broad and asked industry to provide any other comments relevant to the strategic review.

3.0 Sample:

The final sample consisted of 176 industry operators who provided impressions of the Mid North Coast Joint Venture and Demand Building Dollars effectiveness and future direction of Mid North Coast strategic marketing over a three week period. There was incentive given to industry to complete the survey. However, the survey was distributed to tourism industry members' of the Local Tourism Associations/Local Government Associations. Tourism industry operators not members were not given access to the survey.

The survey was first closed on the 3 August but extended to encourage operators from larger LTA/LGA to provide more input than was initially received. With the dates extended, the response of results increased by 63%.

Nothing is yet known about the differences between respondents and non respondents.

4.0 Detailed Findings:

The following information details the findings of each question and provides a graph/chart to easily determine the questions' results.

4.1 Question 1.

Which LGA region is your tourism business located in?

There is a total of 176 industry respondents that completed the survey.

The highest number of responses received was Greater Port Macquarie at 22% and Manning Valley at 21%. The lowest responses were Macleay Valley Coast and Port Stephens at just 4.5% of the total response rate.

LGA Area	% of response rate	Number of responses
• Coffs Coast	13%	23
• Bellingen	7.4%	13
• Nambucca V	17.6%	31
• Macleay V C	4.5%	8
• GPM	22%	39
• Manning V	21%	37
• Great Lakes	9.7%	17
• Port Stephens	4.5%	8

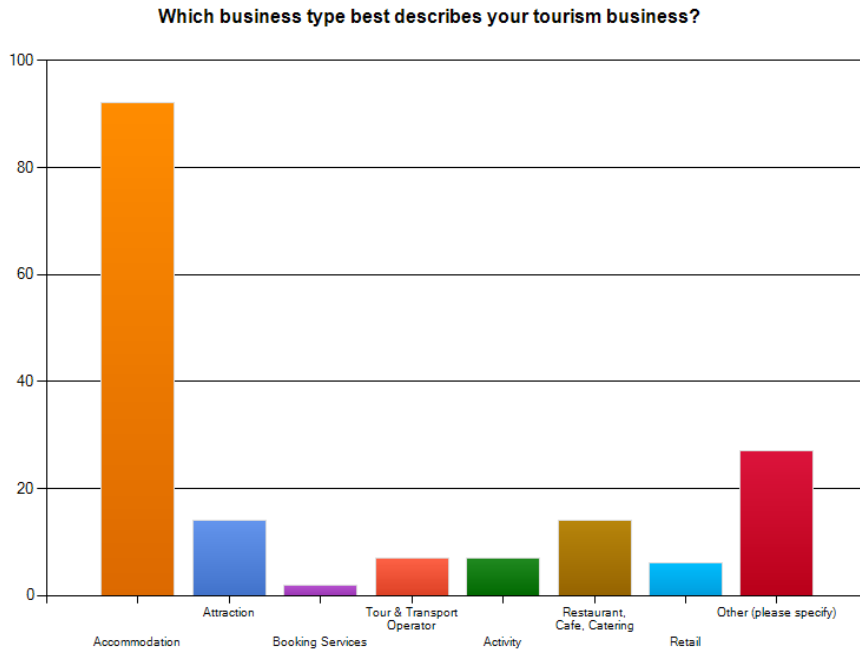
4.2 Question 2.

Which business type best describes your tourism business?

It was found that Accommodation providers had the highest response rate to the survey at 54.4%. However, the definition boundaries of Accommodation extended to Caravan and Tourist Park, Camping, Bed and Breakfast and cabins.

Attractions together with Restaurant & Catering Services equally had the next amount of responses of 8.3% each.

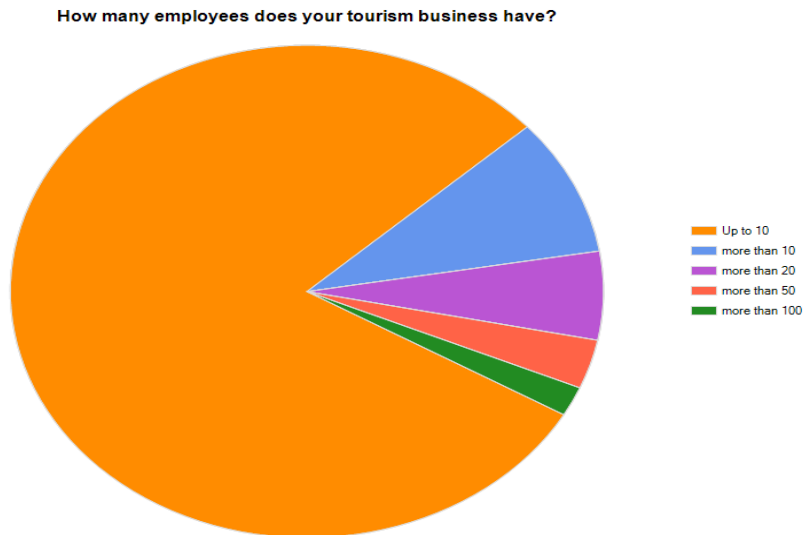
20% of the responses resulted in answering Other with the most being Winery/Vineyard & Distillery at 5 responses, Clubs at 5 and Destination Marketer/Publication at 3.



4.3 Question 3.

How many employees does your tourism business have?

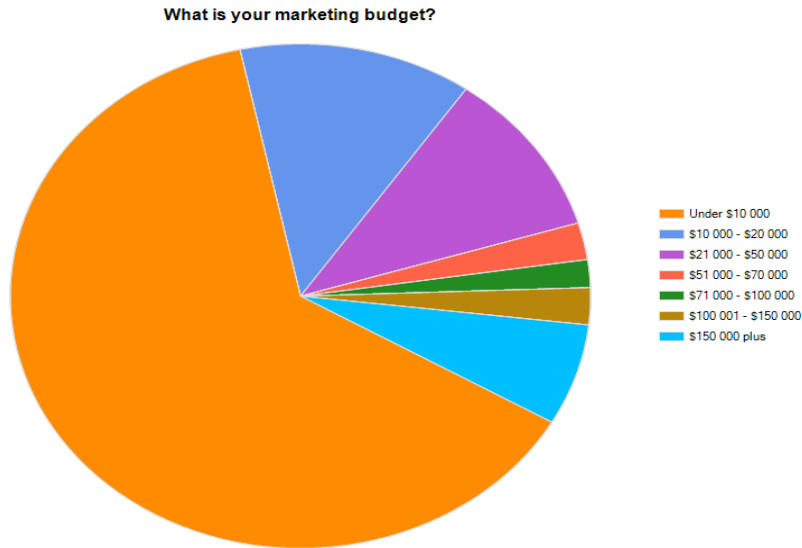
It was found that 80% of the tourism businesses responding to the survey had less than 10 staff members. Only 1.9% of respondents had more than 100 staff members.



4.4 Question 4.

What is your marketing budget?

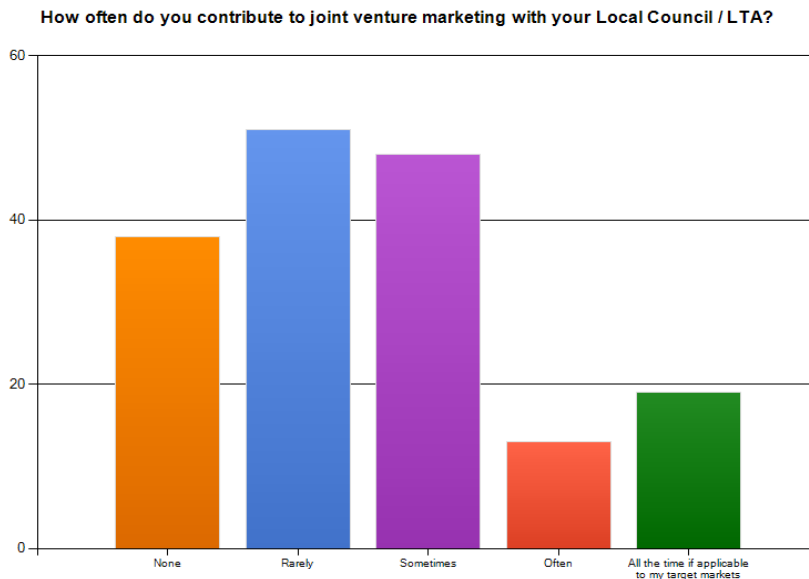
It was found that 63.3% of respondents had marketing budgets under \$10 000 and the next highest amount was 13% between \$10 000 - \$20 000. Although only 11 aggregated number of respondents said that they had budgets between \$51000 and \$150 000, 6.5% or 11 respondents said that they had budgets \$150 000 plus.



4.5 Question 5.

How often do you contribute to joint venture marketing with your Local Council/LTA?

30.2% of the respondents said that they rarely participate in joint venture marketing locally, followed by 28.4% respondents saying that they sometimes participate in joint venture marketing. Only 11.2% said that they participate all the time if it is applicable to their target markets



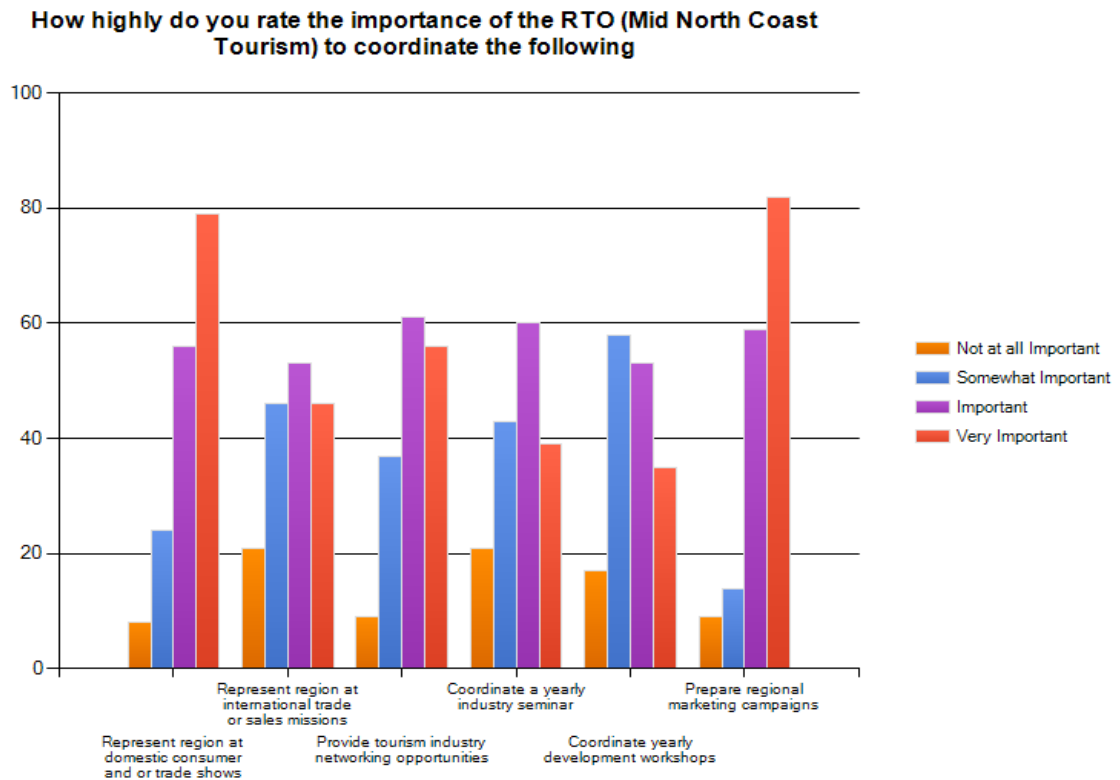
4.6 Question 6.

How highly do you rate the importance of the RTO (Mid North Coast Tourism) to coordinate the following:

It was found that Preparing Regional Marketing Campaigns was scored the highest activity that the RTO should coordinate with its rating average being 3.3. It also had the highest ranking with 50% of respondents saying that it was very important and 35% saying that it is important.

Representing the Region at Domestic Consumer or Trade Shows scored the second highest activity rating average at 3.23. 47.3% said it was very important and 33.5% said it was important.

The highest score for somewhat important role for the RTO was Coordinating Yearly Development Workshops.

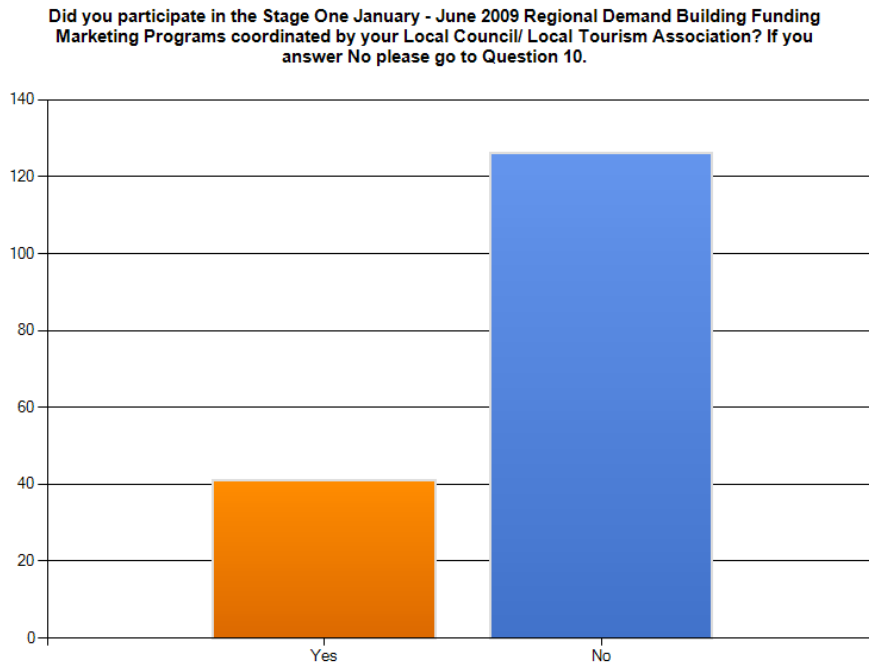


4.7 Question 7.

Did you participate in the Stage one January – June 2009 Regional Demand Building Funding Marketing Programs coordinated by your Local Council/LTA?

If you answer No please go to Question 10.

75.4% of responses to the survey said that they did not participate in Demand Building Funding for Stage one.



4.8 Question 8.

If Yes, would you participate in a Demand Building Campaign again? If no please comment why?

64.7% of the 24.6% of responses who answered yes in Question 7. said that they would participate in Demand Building Funding Marketing Programs again. 35.5% of the 24.6% of responses said they would not participate again.

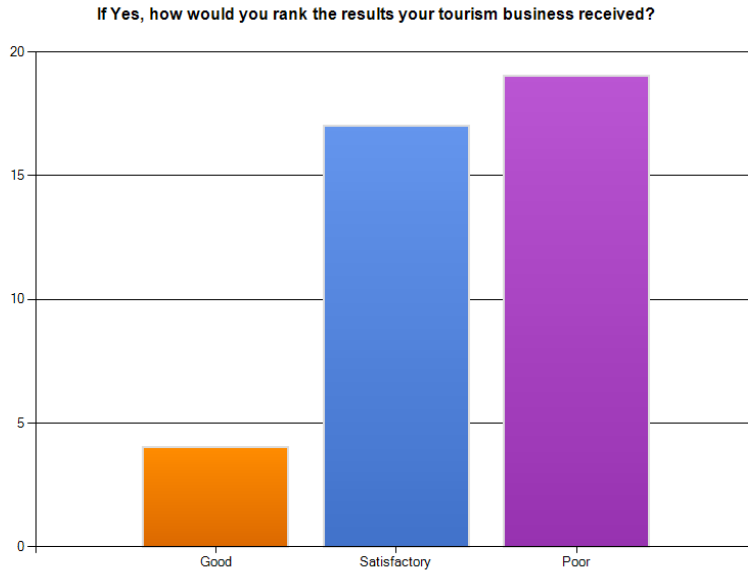
There were a total of 20 replied answers explaining why they would not participate again.

- Have no effect or has produced no results for our business 4 responses
- Too expensive and too costly for smaller operators 8 responses
- Needs to be industry driven – industry to decide on campaign 2 responses
- Our competitive difference was clear to others participating 1 response
- Our Local Campaign wasn't competitive enough 1 response
- We haven't received any information locally about results to decide if we participate 1 response
- Unsure 3 responses

4.9 Question 9.

If yes, how would you rank the results your tourism business received?

From the 64.7% of the 24.6% of respondents who said that they would participate again, 47.5% said that they had a poor result. 52.5% said that they had a satisfactory or good result.



4.1 0 Question 10.

Please explain why you didn't participate in the January-June 2009 Demand Building Funding Marketing Program coordinated by your Local Council/LTA?

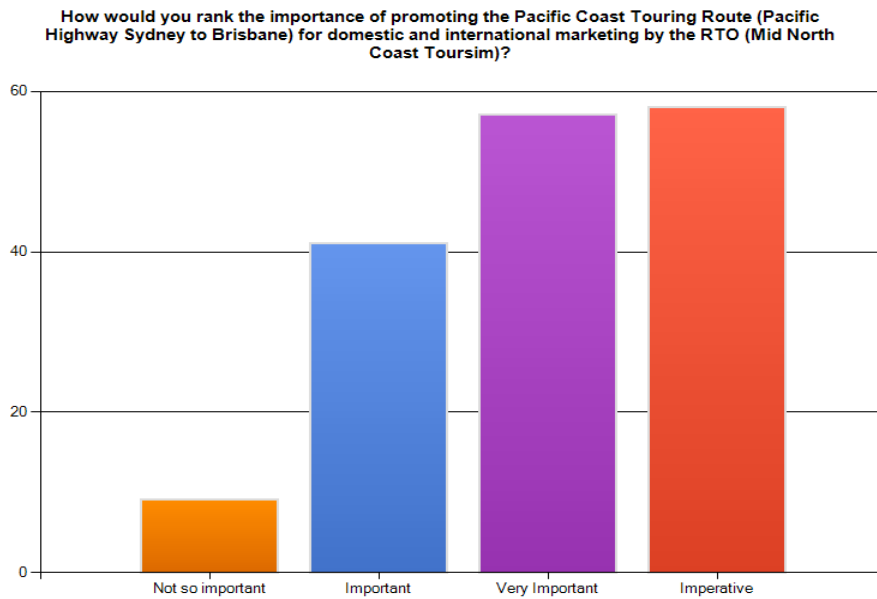
After analysis of the results, 58 survey participants said that they were unaware or didn't know about Demand Building Funding for Stage one.

- Unaware or didn't know about DBD at the time 58 responses
- Too expensive to participate / budget limitations/small business operator 21 responses
- RTO/LGA/LTA campaigns historically don't produce results 3 responses
- Time restraints 8 responses
- New to the industry 11 responses
- Offer was no benefit to my business 7 responses

4.11 Question 11.

How would you rank the importance of promoting the Pacific Coast Touring Route (Pacific Highway Sydney to Brisbane) for domestic and international marketing by the RTO (Mid North Coast Tourism)?

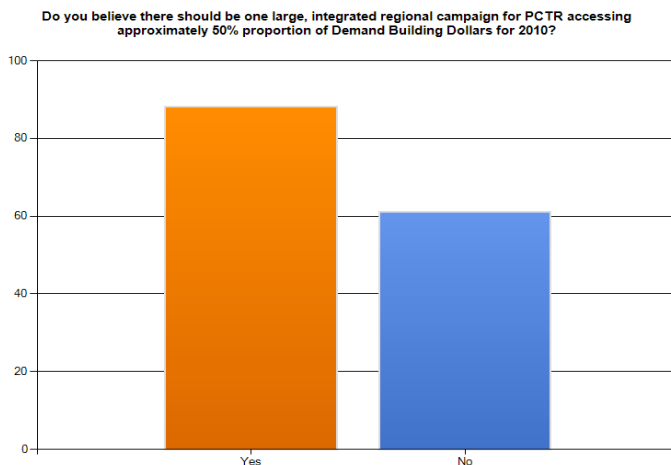
35.2% of responses said that the promotion of the Pacific Coast Touring Route was imperative to domestic and international marketing by the RTO. The second highest response was 34.5% of responses thought that the PCTR marketing to be very important.



4.12 Question 12.

Do you believe there should be one large, integrated regional campaign for PCTR accessing approximately 50% proportion of Demand Building Dollars for 2010?

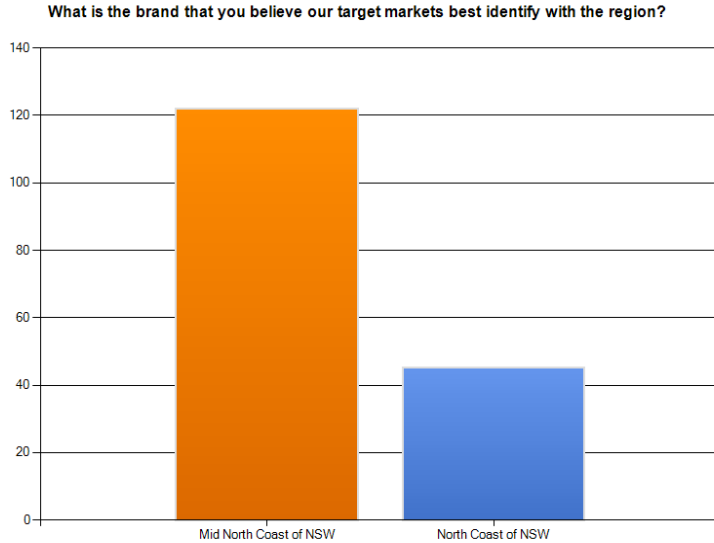
59.1% of respondents said yes, they thought approximately 50% proportion of DBD could be used for promoting the PCTR.



4.13 Question 13.

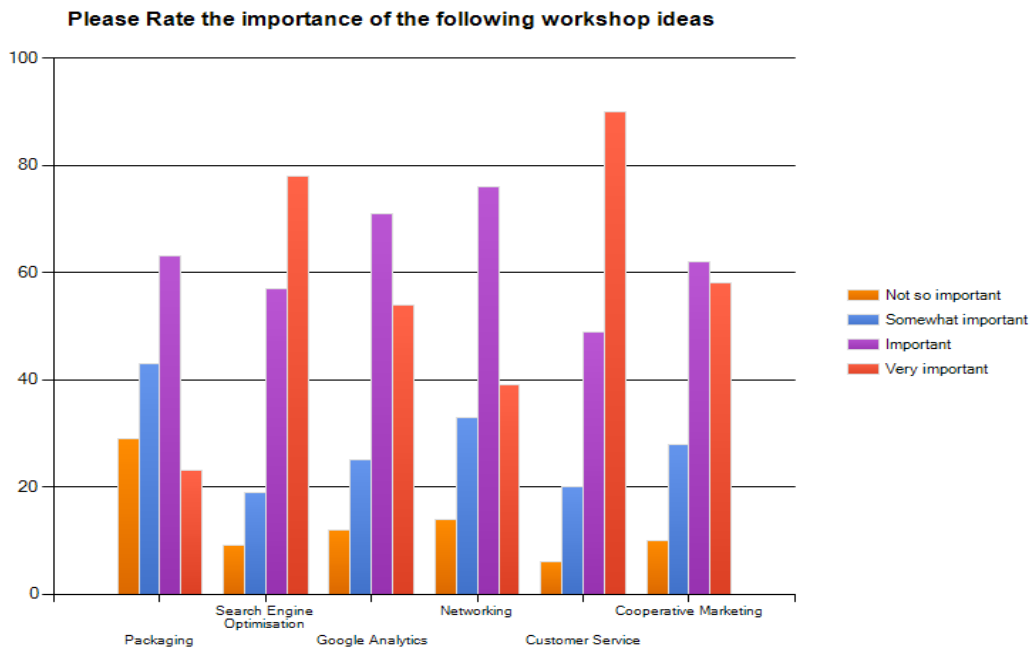
What is the brand that you believe our target markets best identify with the region?

72.2% of respondents said that they believe our target markets best identify the region with Mid North Coast NSW.



Question 14. Please rate the importance of the following workshop ideas.

Customer Service received the highest average response rating of 3.35 and was received the highest rating of very important at 54.5%. 29.7% rated customer service as important. Search Engine Optimisation received the second highest average response rating 3.25 and 47.9% scoring it as very important and 35% important. The lowest rating was packaging



4.15 Question 15

What would you say is the most unique selling point/s of the Mid North Coast? No more than 5 please.

The top five unique selling points identified by industry included the following highest responses:

1. Beaches	78 responses
2. Nature	55 responses
3. Uncrowded/relaxing	55 responses
4. Accessibility/mid location between Sydney & Brisbane	45 responses
5. Climate	44 responses

A further top ten unique selling points identified by industry included the following:

6. Friendly People	24 responses
7. Hinterland	24 responses
8. Waterways & Rivers	22 responses
9. Outdoor Activities	16 responses
10. Whale watching	11 responses

4.16 Question 16

If you would like to provide any other feedback relevant to the Mid North Coast RTO's strategic review please provide comments below.

• Marketing related feedback responses	21 responses
• Partnerships (LGA/LTA/RTO) relationship related feedback responses	16 responses
• Information available to industry related feedback responses	5 responses
• Workshop related feedback responses	2 responses

Total responses see Appendix A

6.0 Limitations

It can be found that the distribution of the online survey may have assured limitations to the collection of survey results. In some local areas, the survey was heavily promoted and members encouraged to participate but in other areas, the survey was not highly promoted and very minimal results were collected.

Another limitation was that Members of Local Tourism Associations/ Local Government Associations were surveyed only and those tourism industry operators not members were not asked to respond to the survey.

7.0 Results at a glance and suggestions

- 80% of the Mid North Coast Tourism Industry is made up of small businesses with small marketing budgets of less than \$10 000 per annum.
- Only 11.2% of respondents said that they have or do participate in joint venture marketing with their local Council or LTA.
- The industry responses stated that they believe Mid North Coast Tourism (RTO) should coordinate Regional Marketing Campaigns as its most important activity followed by representing the region at Domestic Consumer and Trade shows.
- 64.7% of those who participated said they would participate again in Demand Building Campaigns
- However, 47.5% said they had a poor result and 52.5% said they had a satisfactory or good result
- The RTO and LGA/LTA partners need to promote and provide more information regarding Demand Building Dollars
- Promoting the Pacific Coast Touring Route was an imperative and very important activity to the industry who completed the survey – together totalling 69.7% of the answers
- 59.1% believe one large integrated regional campaign – for PCTR with RTO accessing 50% DBD
- 72.2% believe our consumers identify Mid North Coast with the region
- Customer Service workshops were rated as the most important workshop ideas followed by Search Engine Optimisation
- Top 5 USPs include beaches, nature, uncrowded/relaxing, accessibility/location, climate

APPENDIX A. Question 16. ANSWERS

Marketing Related Answers

- You need a better website.
- Because we are very small more help for the tiny tourist ventures is needed
- Port Macquarie must have something for the kids, there is nothing for them now
- Suggest PCTR is a product best suited for the international market rather than domestic. Domestic market tends to purchase destinations with NSW specified to their needs.
- North Coast NSW is a geo locator and campaign zone rather than a brand
- Thanks for the campaign offer but no thanks
- We need to have good measurements of the tourism in the area – how do they get here? How did they find out about it? Etc. This should be everyone’s responsibility and should feed into a central repository. This could be the RTO but it needs a higher profile.
- Tailor marketing to smaller operators
- I would like to participate in Demand Building initiatives in the future but not at this stage
- Stick to one name, people get used to a brand, our area has had about 5 name changes in approx 30 - 40 years
- If we can’t get the customer service right, we may as well forget about the throwing more dollars at marketing
- It should be advertised in the stop revive survive stop offs on the Pacific Highway
- We need programmes of a variety of budgets for small operators like us as well as large ones for tourists for all budgets. Basically we small guys feel left out with the emphasis on big budget campaigns
- More family based attractions desperately needed
- Will go overseas to walk in places like Italy Cionque Terre walk (5towns) not enough publicity about the Port Macquarie walks and there must be similar walks in bushland or spectacular headland walks that would attract overseas tourists who love our beaches and domestic tourists who want to walk some great walks as they do when they go overseas
- Use partners who can provide dynamic content at displays to create a wow factor and differential from all other regions. Don’ rely on banners and pretty brochures and books to get show visitors interested
- You need some real intelligence applied to the matter and some real \$ to follow the ideas and plans up. Nothing I have seen in 10+ years give me any feeling that anyone at the local regional or state level really knows what they are doing and most I speak to are totally unresponsive to new ideas
- We feel that there should be some way of promoting sporting and events. A calendar event should be coordinated so that not all events are held at the same time. We could have booked out 10 times for this week, then have weeks without many bookings.
- Would need to see a breakdown of expenditure for each area promoted across the region, equal share for each area would be preferable
- Questions should have identified if answers related to benefit for the region or just to my specific business
- Would like to see more focus on business tourism to attract corporate companies, associations, meetings, incentives, conferences

Partnership RTO/LGA/LTA Related Answers

- Some action yippee
- What does MNC RTO do? Is it the same as Coffs Coast Marketing?
- Industry need to take a leadership role
- I am involved in our local area to try to coordinate relevant groups within our areas but the LTA has been ineffective for years. Furthermore, the LTA appears to choose to ignore the community within which I have my business!!
- When is the RTO going to listen to industry?
- It would be wonderful to have support of all operators within the tourism industry in the region.
- Council administrator needs to look seriously at bringing major events to Town to attract dollars from outside our region
- What is Council and the RTO doing to support industry?
- Council needs to provide more funding. I seriously don't think council has any idea what they are doing in regards to tourism
- Don't compromise the ability of Port Stephens tourism and its works as the Hunter did
- Get your spelling right and you would get more extensive feedback from participating operators including a more accurate survey
- Sorry but I believe there are too many levels of tourism for funding to go through, local, regional, state and federal, should not be so many -
- We would like to see target markets for baby boomers and international visitors by promoting the coastal walks eg PM Coast walk – in this age group of tourists they are looking at active holidays. I
- didn't answer Q. 3 as we have no employees just us as B&B owners. The marketing budget question should have included a below \$5k section and you would probably be surprised how many small operators would tick the box
- Target some road rehabilitation
- More promotion for accommodation outside of Forster – Council tourism staff need to include and encourage experiences out of tourism industry boundaries. I suspect the habit is to refer always to the same services and activities
- Tourism requires effective Council coordination

Information Related Answers

- Direct line of communication and collaboration
- Operators need to know what the RTO's marketing plan and action plans are so they can work in the with the goals of the region
- I am also in the Northern Rivers RTO and love their newsletter and information I receive, I have very little idea of the direction of the mid North Coast RTO
- Please refrain from using initials in your questions – you assume we all understand your internal jargon and we don't
- But that needs a higher profile for the RTO so that people are aware of it

Workshop Related Answers

- Unique and individual workshops
- Please keep workshops affordable - MV

APPENDIX B. COPY OF SURVEY

1. Which LGA region is your tourism business located in?

- Bellingen
- Port Stephens
- Great Lakes
- Manning Valley
- Nambucca Valley
- Coffs Coast
- Macleay Valley Coast
- Greater Port Macquarie

2. Which business type best describes your tourism business?

- Restaurant, Cafe, Catering
- Accommodation
- Attraction
- Tour & Transport Operator
- Activity
- Booking Services
- Retail
- Other (please specify)

3. How many employees does your tourism business have?

- Up to 10
- more than 10

more than 20

more than 50

more than 100

4. What is your marketing budget?

Under \$10 000

\$10 000 - \$20 000

\$21 000 - \$50 000

\$51 000 - \$70 000

\$71 000 - \$100 000

\$100 001 - \$150 000

\$150 000 plus

5. How often do you contribute to joint venture marketing with your Local Council / LTA?

None

Rarely

Sometimes

Often

All the time if applicable to my target markets

6. How highly do you rate the importance of the RTO (Mid North Coast Tourism) to coordinate the following:

	Not at all Important	Somewhat Important	Important	Very Important
Represent region at domestic consumer and or	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How highly do you rate the importance of the RTO (Mid North	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Somewhat Important	Important	Very Important

Not at all Important Somewhat Important Important Very Important

trade shows	Coast Tourism) to coordinate the following Represent region at domestic consumer and or trade shows Not at all Important				
Represent region at international trade or sales missions	<input checked="" type="checkbox"/> Represent region at international trade or sales missions Not at all Important	<input checked="" type="checkbox"/> Somewhat Important	<input checked="" type="checkbox"/> Important	<input checked="" type="checkbox"/> Very Important	
Provide tourism industry networking opportunities	<input checked="" type="checkbox"/> Provide tourism industry networking opportunities Not at all Important	<input checked="" type="checkbox"/> Somewhat Important	<input checked="" type="checkbox"/> Important	<input checked="" type="checkbox"/> Very Important	
Coordinate a yearly industry seminar	<input checked="" type="checkbox"/> Coordinate a yearly industry seminar Not at all Important	<input checked="" type="checkbox"/> Somewhat Important	<input checked="" type="checkbox"/> Important	<input checked="" type="checkbox"/> Very Important	
Coordinate yearly development workshops	<input checked="" type="checkbox"/> Coordinate yearly development workshops Not at all Important	<input checked="" type="checkbox"/> Somewhat Important	<input checked="" type="checkbox"/> Important	<input checked="" type="checkbox"/> Very Important	
Prepare regional marketing campaigns	<input checked="" type="checkbox"/> Prepare regional marketing campaigns Not at all Important	<input checked="" type="checkbox"/> Somewhat Important	<input checked="" type="checkbox"/> Important	<input checked="" type="checkbox"/> Very Important	

7. Did you participate in the Stage One January - June 2009 Regional Demand Building Funding Marketing Programs coordinated by your Local Council/ Local Tourism Association? If you answer No please go to Question 10.

Yes

No

8. If Yes, would you participate in a Demand Building Campaign again? If No please comment why?

Yes

No

Other (please specify)

9. If Yes, how would you rank the results your tourism business received?

Good

Satisfactory

Poor

10. Please explain why you didn't participate in the January-June 2009 Demand Building Funding Marketing Program coordinated by your Local Council/LTA?

11. How would you rank the importance of promoting the Pacific Coast Touring Route (Pacific Highway Sydney to Brisbane) for domestic and international marketing by the RTO (Mid North Coast Tourism)?

Not so important

Important

Very Important

Imperative

12. Do you believe there should be one large, integrated regional campaign for PCTR accessing approximately 50% proportion of Demand Building Dollars for 2010?

Yes

No

13. What is the brand that you believe our target markets best identify with the region?

Mid North Coast of NSW

14. Please Rate the importance of the following workshop ideas

	Not so important	Somewhat important	Important	Very important
Packaging	<input type="checkbox"/> Please Rate the importance of the following workshop ideas Packaging Not so important	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Important	<input type="checkbox"/> Very important
Search Engine Optimisation	<input type="checkbox"/> Search Engine Optimisation Not so important	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Important	<input type="checkbox"/> Very important
Google Analytics	<input type="checkbox"/> Google Analytics Not so important	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Important	<input type="checkbox"/> Very important
Networking	<input type="checkbox"/> Networking Not so important	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Important	<input type="checkbox"/> Very important
Customer Service	<input type="checkbox"/> Customer Service Not so important	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Important	<input type="checkbox"/> Very important
Cooperative Marketing	<input type="checkbox"/> Cooperative Marketing Not so important	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Important	<input type="checkbox"/> Very important

Other (please specify)

15. What would you say is the most unique selling point/s of the Mid North Coast? No more than 5 please.

16. If you would like to provide any other feedback relevant to the Mid North Coast RTO's strategic review please provide comments below.