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Introduction

The Coffs Coast Tourism Region is visited by an estimated one million tourists per annum (Coffs Coast Tourism 2005). The Coffs Coast consists of three local government areas. They are the City of Coffs Harbour, the Shire of Nambucca and the Shire of Bellingen. The coastal destinations of Coffs Harbour and Nambucca are characterised by a mild, enervating climate with spectacular beaches and coastal scenery. Bellingen is an attractive rural area, with scenic vegetation, surrounding wooded, sub-tropical ranges and meandering rivers flowing from the Dorrigo World Heritage Area to the Pacific Ocean.

Throughout the period January 1998 to December 2001, the State of NSW as a whole, experienced stable domestic tourist visitation while the North Coast Region of the State experienced declines of over five percent (ATS Group, 2004: 19). The decline has been recorded principally in the holiday/leisure market (ATS Group, 2004: 19), and is attributed to a change in the travel behaviour of regional tourists. The report identifies two broad market segments visiting the region. These two segments reflect different travel motivations. The report describes the first of these segments as:

1. *The destination specific tourist* – This broad segment comprises the dominant market segment for the region that frequently returns each year. These visitors rarely change their destination and participate in traditional coastal activities that centre on their accommodation base (ATS Group, 2004: 2).

The second segment identified in the ATS Group report has been described as:

2. *The regional traveller* – This segment includes the *in-transit traveller* who tends to have short stays on their journey to another destination; and the *experiential traveller,* described as those travellers seeking a diversity of experiences within the region. They are referred to as *experiential travellers* due their 'underlying desire to experience and interact with the region's natural, cultural and social values' (ATS Group, 2004: 2-3). High yield niche markets, those narrowly defined market segments which yield higher than average returns from tourists, were identified within the experiential traveller segment. Such markets include backpackers, nature-based visitors, and eco-tourism, food and wine and cultural heritage travellers.

The Tourism Plan Report (ATS Group, 2004) argues that recent urban development in the North Coast region, a lack of destination differentiation, and changes in the benefits visitors seek from the travel experience, have combined to lead to a decline in the traditional *destination specific tourist* segment. These travellers have traditionally been the core market for the North Coast NSW region and for important components of this larger region, such as the Coffs Coast region. The report further argues that the tourism market is evolving towards experiential travel where the motivation of travellers is based on the desire for a travel experience emphasising cultural and social immersion that may include adventure activities and educational experiences (ATS Group, 2004).

Principally due to such findings, the aim of this research was to undertake an investigation into the recent behaviour and motivation of travellers to the Coffs Coast region. The findings of this research aim to assist in the development of both a local and regional marketing strategy that recognises changing demand patterns by visitors in choosing a destination such as the Coffs Coast region on the East Coast of Australia. As a result, the research aims to assist product development and destination promotional activities and to better harmonise these activities with market demand.

Specific aims of the project were to identify:

1. characteristics of tourism visitors to the Coffs Coast Region.
2. reasons for visiting the region.
3. activities/experiences undertaken by these visitors.
4. an estimate of expenditure within the region by tourists, and
5. the main information sources used by visitors to the Coffs Coast region.

The need to conduct future research outside the Coffs Coast region to establish the characteristic and motivation of potential travellers who do not currently visit the region is recognised as a limitation of the current study. This paper commences with a discussion of literature relating to destination decision making. The following sections discuss the methods used to collect information from visitors to the region and present the results of the study. The final section discusses the implications of these findings for regional destination planning and marketing.

Leisure travel destination decision processes

A range of theoretical models have been advanced in the academic literature to explain the destination decision process (Chon, 1990; Woodside & Lysonski, 1989; Gunn, 1989; Clawson & Knetch, 1966). It has been widely argued by researches concerned with such a purchasing decision, that the consumer's decision to purchase is a multi-staged process (Chon, 1990; Woodside & Lysonski, 1989; Mayo & Jarvis, 1981; Hunt, 1975; Gunn, 1972; Clawson & Knetch, 1966). Kotler (1989) for example, identifies that when involved in a purchase decision, the consumer transits the stages of:

1. need recognition
2. information search
3. evaluation of alternatives
4. choice of product or service and
5. post-purchase evaluation.

Not every purchase transits each step of the model. However, a key advantage of this model is that it recognises that the buying decision process is likely to commence long before actual purchase and continue after purchase has occurred, signalling that marketers need to focus on the entire buying process rather than just on the purchase decision (Kotler, 1998). Following on from need recognition, information search is the stage in the process where the consumer is aroused to search for more information. This state may encourage the consumer to go in active search of information or may heighten their attention to relevant information sources including advertising. It is vital marketers understand the sources from which customers draw their information if they are to influence the decision process (Gartner, 1993).

Once sufficient information is gathered, the consumer moves to the evaluation of alternative solutions to their needs. The evaluation process is complex and will vary according to the buying situation. However, in general terms, the consumer will examine the attributes of the product, assign different levels of importance to such attributes, determine the likely level of overall satisfaction with each alternative and derive an attitude toward the different solutions/brands. Marketers need to better understand how their customers evaluate alternatives so they may take steps to influence the outcome. A strategic planning and management approach can provide a valuable systematic framework to assist this process by better identifying the need to alter the attributes of the product, or better inform customers of the benefits of certain attributes of a certain destination.

In the evaluation stage, consumers rank brands and form purchase intentions. Generally, the consumer's decision will be to purchase the preferred brand/solution but two factors can come between the purchase intention and the purchase decision. The first factor is the attitude of key people and relationships that may influence the purchase decision, for example family members. Marketers must therefore be aware of those who influence the buying decision. They may decide to use targeted communication to influence their buying attitudes, as well as those of the purchaser. The second is unexpected situational factors. In such situations, the potential purchaser may find some element of the marketing mix which does not meet their expectation, such as discovering a price increase or finding the standard and type of service received at a particular distribution outlet to be unsatisfactory (Kotler, 1998).

The decision process is not complete when the sale has been made as the consumer may experience varying degrees of satisfaction with the outcome. The consumer can therefore be expected to engage in a form of post-purchase evaluation. The relationship between consumer expectations and their perception of product performance will determine their satisfaction level. Creating satisfied customers is essential as this both assists in customer retention and can lead to new business through satisfied customers becoming advocates for the product. Firms therefore need to monitor both customer expectations and their satisfaction levels (Lovelock, Patterson & Walker, 2001).

Researchers in the tourism and recreation area concerned with the travel purchase decision have made similar observations to that of researchers investigating consumption decisions. The decision to travel has been recognised as multi-phased rather than a single step process (Chon, 1990; Gunn, 1989; Clawson & Knetch, 1966). Clawson and Knetch (1966) identified a five-phased process in their recreational behaviour model:

1. Anticipation: planning and thinking about the trip.
2. Travel to the site: getting to the destination.
3. On-site behaviour: behaviour at the site or destination region.
4. Return travel: travelling home.
5. Recollection: recall, reflection and memory of the trip.

The anticipation stage in this travel decision process incorporates the activities undertaken prior to travel, including need recognition and information search. Travelling to the site could involve a range of experiences and service encounters depending on the mode of transport. In some travel situations travel to and from the site may be a major part of the travel experience as in the case of long haul international travel or luxury train journeys. Behaviour on the site incorporates the actual travel experience and is influenced by a wide number of service providers including the accommodation facility, recreation outlets, retail services and interaction with other travellers. Recollection and recall of the trip includes the post-purchase evaluation phase. This will have a major impact on the next purchase decision (Clawson & Knetch, 1966).

The work of Gunn (1989), identified a seven stage process in the leisure travel experience:

1. Accumulation of mental images about vacation experiences.
2. Modification of those images by further information.
3. Decision to take a vacation trip.
4. Travel to the destination.
5. Participation at the destination.
6. Return travel.
7. New accumulation of images based on the experience.

Gunn made explicit reference to changes in destination image as the consumer moves through the seven stages of the leisure travel experience. The process begins with the accumulation of destination images from a wide variety of sources that are then modified as a result of extended information search. These images are again altered during the post-purchase evaluation of the travel experience, implying the concept of continually evolving destination image. This observation supports the work of Hunt (1975) and Mayo and Jarvis (1981), who argue that a traveller's choice of destination is subjective and multi-faceted. While there are many factors involved in the decision making process, the most important is based on the image projected by a set of alternatives and the perceived ability of that image to most closely satisfy the travellers' needs (Mayo & Jarvis, 1981).

The travel process models emphasise the need for direct experience to evaluate the tourism product. There is an emphasis on actual service consumption, including travel to and from the destination along with actual on-site behaviour. Another key difference with more general consumer purchase decision models is that the travel process models omit the 'evaluation of alternatives phase' from their framework. This omission has the potential of reducing the importance of competition between tourism destinations for a limited number of available consumers. As competition for tourism visitation between destinations increases it becomes increasingly challenging for destination marketers to differentiate themselves adequately within the marketplace. Because of this, it is argued by the authors of this paper that increased attention needs to be paid to the way in which potential visitors evaluate destination alternatives. This is supported by the work of Hankinson (2001).

Arguably, the psychology and behaviour of tourists when choosing, consuming and later evaluating their destination experiences, represents one of the most complex fields of consumer behaviour research. Consumers are usually highly involved in the purchase of the tourism destination, it is usually a relatively expensive decision, it may be risky and is often highly self-expressive. There are also significant differences between brands (destinations) requiring significant information gathering, and consumers may hold strong beliefs or attitudes about different destinations (Van Raaij and Crotts 1994, Crouch 1996). Beside destination choice, research relating to the factors and processes that influence the image and attractiveness of a destination has received considerable research attention (for example, Echtner and Ritchie 1991 and 1993, Dann 1996, Selby and Morgan 1996, Lubbe 1998, Walmsley and Young 1998). In addition, studies have investigated the destination experience, including dimensions of quality and factors leading to satisfaction/dissatisfaction (Otto and Ritchie 1996, Hudson and Shepherd 1998, Sheppard et.al. 1998, Tribe and Snaith 1998).

The destination product is an experience comprising an array of commercial tourism services (e.g. accommodation, commercial attractions, events, car rentals, restaurants, tours, for example). However, non-commercial experiences (for example, a cityscape, forest, beach, wildlife, local residents) are also important. The destination product therefore, is complex and not subject to the degree of control and management often available for other products. There has been little evident effort in research to date to study marketing and management of the destination product covering all of its attributes. Studies have tended to selectively address certain product elements in isolation (Crouch 2000:69).

To this end, there are important limitations evident in existing models of destination choice. Thus, recent conceptual research has proposed a more comprehensive approach that investigates attributes associated with industry level competitiveness to more conventional destination attributes, such as physiography, activities that can be undertaken and the available tourism superstructure (Enright and Newton 2005). Such competitiveness is increasingly being seen as a critical influence on the performance of tourism destinations in competitive world markets. This has been an area receiving increased attention from researchers interested in tourism (for example, Chon and Mayer 1995; Crouch and Ritchie 1999; Hassan 2000). Ritchie and Crouch (2000:6) argue that destination competitiveness has "tremendous ramifications for the tourism industry and is therefore of considerable interest to practitioners and policy makers". The work of Crouch and Ritchie (1999) extends research focused mainly on the attributes that are seen to attract visitors such as climate, scenery and accommodation (see for example, Gallarza, Saura, and Garcia 2002) to investigate factors that may affect the competitiveness of firms that supply tourism products and services at a destination. This paper investigates the activities and experiences undertaken by visitors to the Coffs Coast Region. However, the research presented here is also interested to identify indicators of satisfaction associated with activities undertaken and business services received, as well as estimates of expenditure on various business categories within the region. To this end, the research presented here, investigates factors important to business performance and competitiveness within a tourism destination.

Survey Methods and Results

Purposive sampling was used in this study and respondents interviewed at tourist locations within the Coffs Coast region during the final week of January, 2005. These sites were identified by the Coffs Coast Tourism Association. This ensured the maximum amount of relevant information relating to tourists, could be collected from respondents (Jennings 2001). The period during which the survey was conducted is an important holiday time in Australia and can be expected to influence the nature of visitors to the region. There were 131 respondents to the survey. A key aim of this survey was to provide a more comprehensive framework for future surveys. It is important that findings of this initial study be used to generate further, more frequent research in the field of regional tourism. Such surveys will enable key tourism stakeholders to develop a more informed understanding of the tourist market to the region, paying particular attention to the effects of the seasonal impact on tourism flows, for example.

The majority of visitors to the Coffs Coast region where found to be families with children aged 13 years or under (30.9%) with parents aged between 25 and 44 years (33.3%). This information is important for the marketing of the Coffs Coast region as it indicates the region is currently attracting holidaying families. Table 1 shows the information sources used by visitors to plan their trip to the Coffs Coast region. It can be seen from Table 1 that the internet is now a key tool used by visitors planning a holiday. The majority of visitors to the region (64.3%) used the internet to plan some aspect of their holiday. Continuing to have appropriate, accessible and user-friendly tourism web sites for the marketing of the destination would therefore seem important. The next highest source of information was ‘family and friends’. This implies that favourable feedback on the region from friends and/or family either living in the region or who have previously visited the region, is an important influence upon the decision to holiday in the region. Visitor Information Centres also play an important role in holiday planning. Therefore, it is important such information centres are visible and accessible and provide information on local attractions and entertainment activities.

Table 1 - Information Sources used for Trip Planning

	Extensive %	Very Much %	To Some Extent %	A Little %	Not At All %
Airline	21.8	4.3	4.3	0.0	69.6
Coach Operator	17.5	4.3	0.0	4.3	73.9
Travel Agent	54.6	0.0	3.0	3.0	39.4
Visitor Centre	33.3	13.9	13.9	2.8	36.1
Motoring Organisation	0.0	5.0	0.0	0.0	95.0
Family/Friends	54.7	15.1	3.8	3.8	22.6
Magazines, Papers and Brochures	40.0	14.0	12.0	8.0	26.0
Internet	64.3	7.1	8.9	1.8	17.9

Table 2 shows most visitors travel to the region in private vehicles (73.6%). This implies that regional planners need to provide infrastructure in the form of well maintained and safe highways for example, to support the arrival of a relatively large number of visitors with their own vehicles at key holiday periods during the year. This is currently a major concern for tourism planners and marketers on the East Coast of Australia. There have been a relatively large number of traffic accidents involving fatalities on the Pacific Highway (the main highway which provides the primary access to East Coast tourism destinations, including the Coffs Coast Region). For example, from 1994 to 2003 the Pacific Highway was the scene of 9996 crashes, accounting for 453 deaths (NRMA Motoring and Services 2005). It is expected that unless significant upgrades are undertaken on the Pacific Highway within the near future, such accidents will exert an important influence on the willingness of self-drive tourists to visit the Coffs Coast and associated regions on the East Coast. The infrastructure considerations need to include appropriate parking at locations including beaches, entertainment venues, and shopping complexes. High fuel prices can also be expected to impact on the willingness of visitors to travel to the Coffs Coast region.

Table 2 – Mode of Transport to Coffs Coast Region

Category	Percentage (%)
Airline	13.1
Tour Coach	7.0
Caravan	3.9
Coach	0.8
Motorbike	0.8
Vehicle	73.6
Motor Home	0.8
Train	0.0

Satisfaction levels of visitors to the region

Table 3 presents data on the satisfaction levels of visitors to the Coffs Coast Region according to length of stay, reasons for visiting, and whether or not, this was the first visit undertaken. Table 3 shows that over 98% of visitors were satisfied with their visit to the Coffs Coast region, with the majority (53.3%) finding their visit was 'as expected'. A substantial proportion of respondents (40%) reported satisfaction levels to be above expectations. However, while no visitors stated that their experiences were "well below expectations", nearly 2% reported that their experience was 'below expectations'.

Table 3 –Percentage of Visitors to Coffs Coast Region according to Period of Visit, Reason for Visit and Satisfaction Level Experienced

PERIOD (DAYS)	REASON FOR VISIT	SATISFACTION LEVELS									
		Well Above Expectations (%)		Above Expectations (%)		As Expected (%)		Below Expectations (%)		Well Below Expectations (%)	
		Never visited	Visited before	Never visited	Visited before	Never visited	Visited before	Never visited	Visited before	Never visited	Visited before
1-2	Holiday	0.0%	0.0%	1.8%	3.5%	8.0%	5.3%	0.0%	0.0%	0.0%	0.0%
	Friends/relatives	0.0%	0.0%	0.0%	1.8%	0.9%	1.8%	0.0%	0.0%	0.0%	0.0%
3-7	Holiday	0.9%	1.8%	4.4%	11.5%	5.3%	18.6%	0.0%	0.0%	0.0%	0.0%
	Friends/relatives	0.0%	0.9%	1.8%	5.3%	0.9%	2.7%	0.0%	0.0%	0.0%	0.0%
8-10	Holiday	0.9%	0.9%	0.9%	0.9%	0.9%	4.4%	0.9%	0.0%	0.0%	0.0%
	Friends/relatives	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
11-15	Holiday	0.0%	0.0%	0.9%	1.8%	0.0%	1.8%	0.9%	0.0%	0.0%	0.0%
	Friends/relatives	0.0%	0.0%	0.0%	1.8%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
16-20	Holiday	0.0%	0.0%	0.0%	1.8%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%
	Friends/relatives	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total	**1.80%**	**3.60%**	**9.80%**	**30.20%**	**16.00%**	**37.30%**	**1.80%**	**0.00%**	**0.00%**	**0.00%**

Examination of supplementary comments provided by respondents noted on questionnaires by the interviewers, indicated that poor weather, including rain at the time of conducting the survey, was an important influence upon answering this question. Such weather patterns were unusual for the Coffs Coast region at that time of year. In general, the data presented in Table 3 suggests visitors are satisfied with their experience while holidaying on the Coffs Coast. A more detailed analysis of pre-purchase expectations would however, need to be made with visitors in order to substantiate this claim more fully. Geva and Goldman (1991: 141) argue for example, that 'satisfaction with past purchase may not be closely related to intentions to repurchase because of the different functions they may fulfill. Whereas satisfaction reflects the need to justify past purchase behaviour, intentions to repurchase, which are of instrumental importance, reflect learning from experience'. As there is not likely to be a direct causal link between satisfaction and repurchase intentions, tourism based firms should not be content with simply being informed about visitors' satisfaction levels.

From Table 3 it can be seen that over 70 per cent of visitors had been to Coffs Harbour prior to their current visit. It could therefore be expected that such tourists were familiar with the region and its attractions and were informed visitors. The overall satisfaction level apparent from Table 3 is therefore consistent with the relatively high proportion of return visitors to the region. From the Table it can also be seen that the majority of visitors stay for 10 days or less. The average length of visit was 2 to 3 days, although the majority of respondents were visiting for between 3 and 10 days. A quarter of visitors interviewed in the survey stayed for 8 days or more. Destination Marketing Organisations need to aim to increase this proportion, in order to increase the economic impacts of expenditure of visitors in a manner likely to stimulate regional output and employment further.

Respondents were given the choice of indicating the main reason for visiting the Coffs Coast region. Possible reasons included for; 1. Holiday, 2. Visiting Friends and Relatives, 3. Personal, 4. Conference, 5. Sport, 6. Education, 7. Business, or 8. Shopping. Largely due to the time of the year when the survey was conducted, the majority of visitors were holidaying. However, a relatively high proportion also gave their reason as, 'visiting friends and relatives', living within the region. There were either zero or relatively low proportions recorded against reasons other than 'holiday' or 'visiting friends and relatives'. This demonstrates the need to conduct such visitor destination surveys throughout the year in order to develop a more comprehensive understanding of visitor destination decision making.

A Chi Square test was undertaken to examine for possible relationships between the two variables, *satisfaction levels* and whether *visited region before or not.* This test was undertaken for the ten cross tabulations involving *whether visited before or not* (2) and *satisfaction levels* (5). The test indicated that there was no significant difference (at the 0.05 level) in the distribution of satisfaction levels, according to whether an individual had visited the region before, or not. With four degrees of freedom the calculated Chi Square value was 5.30 compared with a critical value of 9.49. A similar test was undertaken to investigate the relationship between satisfaction levels and reasons for visiting the region. Once again there was no significant difference between the distribution of satisfaction levels according to reasons for visiting the region. Similarly there was no apparent significant difference between the distribution of length of stay and reasons for visiting the region. Amongst other things, Table 3 suggests that those concerned with marketing the Coffs Coast as a destination, need to aim to increase the relationship between higher levels of satisfaction and increased length of stay.

Attractions Visited According to Enjoyment

Respondents were asked to indicate those attractions on the Coffs Coast they were most likely to visit and that they most enjoyed. The data above shows the ranking of attractions based on this information. The Big Banana recorded the highest proportion of visitors as the location they were most likely to visit. The Big Banana, markets itself as Australia's original 'Big Thing', and is situated on the Pacific Highway just north of Coffs Harbour. It has been at the current location for around forty years and has been utilised by drive visitors to the region, often as a 'halfway stop', between the state capitals of Sydney and Brisbane. It includes rides for children and family members, including a toboggan, ice skating, a snow slope, recreational activities, and a range of food and retail outlets.

The Big Banana, was followed by the Porpoise Pool. This oceanarium was established in Coffs Harbour in 1970 and houses dolphins, seals and sea lions. The next ranked attraction was Park Beach Plaza. This is a large, contemporary, regional shopping centre located on the Pacific Highway at Coffs Harbour. It consists of 120 specialty shops, a food court, banks and a retail grocery outlet and is open for business throughout the week. Of key interest from the Table, is the disparity between intention and action. For example, 92 visitors intended to visit the Big Banana yet only 52 recorded a satisfaction rating. The anomaly could result from the fact that at the time of providing information, the visitor had intended to visit but had not done so at the time of conducting the survey.

Table 4 – Built Attractions most likely to visit and most enjoyed

Attraction (sorted)	Most Likely to Visit %	Attraction (sorted)	Most Enjoyed %
Big Banana	65.6	Park Beach Plaza	30.5
Porpoise Pool	55.7	Big Banana	27.5
Park Beach Plaza	51.9	Porpoise Pool	21.4
Jetty Markets	35.1	Butterfly House	7.6
Fishing	25.2	Fishing	7.6
Surfing	21.4	Jetty Markets	6.9
Butterfly House	18.3	Surfing	6.1
Coffs Promenade	16.8	Coffs Promenade	5.3
Bellingen Markets	16.0	Bellingen Markets	4.6
Whale Watch	14.5	Old Butter Factory	4.6
Horse Riding	13.7	Waterfall Way	3.8
Clog Barn	13.0	Golf	3.1
White Water	13.0	Yellow Shed	3.1
Old Butter Factory	12.2	Coffs Zoo	2.3
Coffs Zoo	11.5	Whale Watch	2.3
Golf	11.5	White Water	2.3
Waterfall Way	11.5	Clog Barn	1.5
4WD-Trail Bike	9.9	Horse Riding	1.5
Honey Place	6.1	4WD-Trail Bike	0.8
Surf Rafting	5.3	Honey Place	0.8
Raleigh Vineyard	3.8	Opal Centre	0.8
Yellow Shed	3.8	Surf Rafting	0.8

Table 5 shows details of intention to visit natural attractions within the Coffs Coast region. A relatively high proportion of respondents (92.4%), indicated that they were ‘likely to visit’ beaches. Marine Parks recorded the next highest ranking for ‘likely to visit’. A relatively high proportion also indicated that they intended to visit rivers/estuaries. The data suggests that a majority of visitors to the region intend to visit and enjoy beaches and surrounding water based natural attractions. As a result, it could be argued that the focus of marketing campaigns targeting holiday makers over the summer period should clearly identify the region’s beaches and associated activities.

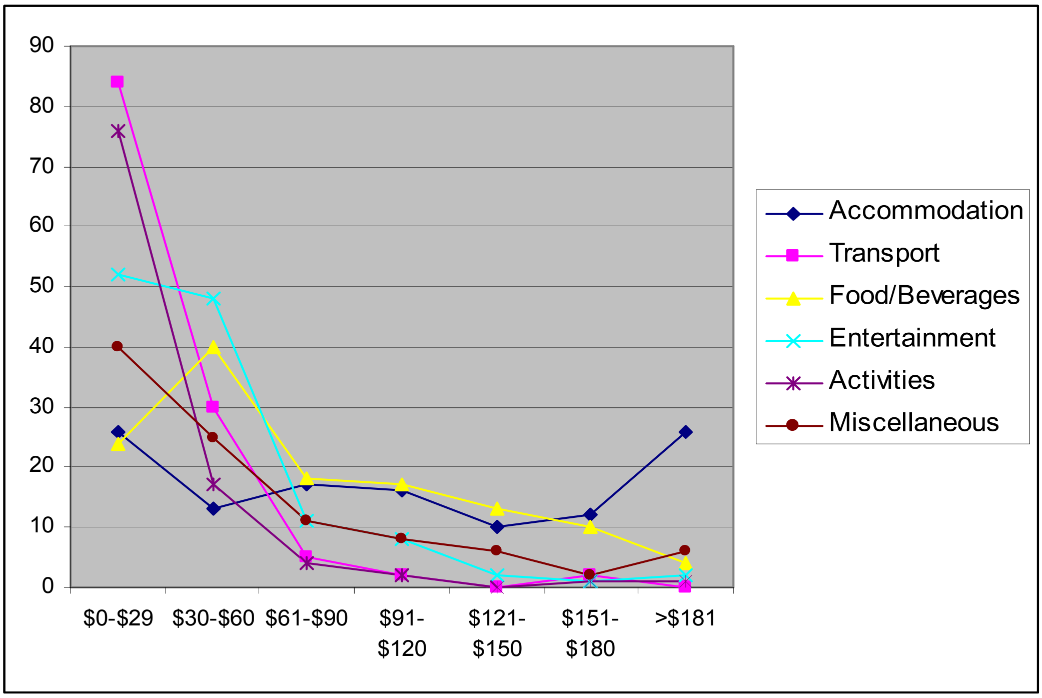
Table 5 - Intention to Visit Natural Attractions

Attraction	Likely to Visit	Neutral	Unlikely to Visit
National Parks	34.4%	0.8%	12.2%
Botanic Gardens	22.1%	0.0%	13.7%
Marine Parks	38.9%	3.8%	9.9%
Beaches	92.4%	0.8%	2.3%
Hinterland	27.5%	2.3%	11.5%
Rivers/Estuaries	33.6%	3.1%	11.5%

The main problem with such an approach is that it is difficult to adequately differentiate the Coffs Coast destination from other coastal destinations found on much of the East Coast of Australia, using such a strategy. Tourism literature indicates for example, that tourists' intention to re-visit a destination is linked to a destinations' difference and image compared to other destinations. Bigne, Sanchez and Sanchez (2001) suggest, for example, that a place's image is more important in leading visitors to re-visit compared to satisfaction levels. Further research needs to be conducted to determine the attributes of beaches that most appeal to visitors and to ensure these are maintained as an integral part of the region's development plans.

Figure 1 presents a graphical representation of responses according to class intervals of daily expenditure by visitors to the Coffs Coast region according to expenditure categories. The majority of responses for each expenditure category fall in the lowest expenditure interval ($0-$29). Expenditure on food and beverages recorded fell in the next lowest expenditure band of $30-$60, and accommodation with an equal number of respondents in the lowest expenditure band ($0-$29) and the highest expenditure band (>$181).

Figure 1 - Expenditure Categories



It is evident from the expenditure data that most visitors to the Coffs Coast region prefer to limit expenditure to the lower levels. This is consistent with other results which indicate that families groups dominate the visitor profile to the Coffs Coast region. It appears from the data that such family groups are seeking relatively low cost forms of entertainment and activities during their stay. They are also predominantly using their own vehicles for transport. Such expenditure patterns have important implications for those involved in destination planning and marketing. They suggest that a key attraction of the destination is the ability of visitors to access and enjoy lower cost activities.

Summary and Conclusions

It has been argued by tourism planners and practitioners that recent urban development in the North coast region of New South Wales, a lack of destination differentiation, and changes in the benefits visitors seek from the travel experience, have all led to a decline in the traditional *destination specific tourist* segment. These travellers have traditionally been the core market for the North Coast New South Wales region and for important components of this larger region, such as the Coffs Coast region. The aim of the research was to evaluate important behavioural aspects of travellers to the Coffs Coast region of the East Coast of Australia. Such insights will assist in the identification of existing and potential target markets for the region. It can also be expected to assist tourism destination planning in the provision of facilities and activities for visitors. It is important to attempt to better understand the behaviour of tourists when choosing, consuming and later evaluating their destination experiences. The destination product is an experience comprising an array of industry tourism services and non-commercial experiences.

Purposive sampling was used in this study. Respondents were interviewed at tourist locations within the Coffs Coast region during the final week of January 2005, in order to identify visitor behaviours and satisfaction levels. The period of the survey was a popular holiday time, which can be expected to influence the results of the survey. Sites were identified by the Coffs Coast Tourism Association. This ensured the maximum amount of relevant information relating to tourists, could be collected from respondents.

Visitors to the Coffs Coast region were found predominantly, to be families with children aged 13 years or under, with parents aged between 25 and 44 years. Most visitors travel to the region in private vehicles. Regional planners will need to provide the appropriate infrastructure in the form of well maintained and safe highways, to support the arrival of visitors with their own vehicles at key holiday periods during the year. They will also need to be sensitive to the potential impact of increases in the cost of fuel upon visitor numbers. A high proportion of visitors indicated that they were satisfied with their visit to the Coffs Coast region. Additional research involving an analysis of pre-purchase expectations would however, need to be made in order to substantiate this claim. The majority of respondents were visiting for between 3 and 10 days. A quarter of visitors interviewed in the survey stayed for 8 days or more.

The internet was use to plan at least some aspect of the holiday of visitors, in a majority of cases. Continuing to have appropriate, accessible and user-friendly tourism web sites for the marketing of destinations would therefore seem important. Expenditure data collected in the survey suggest that families visiting the Coffs Coast region seek relatively low cost entertainment and activities during their stay. Their preference to self-drive, also acts to limit their use of alternative forms of transport while holidaying within the region.

Enright and Newton (2005), suggest that both industry-level and destination attributes should be evaluated in the development of strategies aimed at increasing the competitiveness of a destination. The relative importance of such attributes are likely to vary across destinations, especially in complex sectors such as tourism. The work of Ritchie and Crouch (2000) has been instrumental in directing research to include elements of tourism competitiveness and firm-industry competitiveness as key factors influencing the overall competitiveness of a destination.

Enright and Newton (2005), found that in all of the destinations included in their study, many of the business factors were rated higher than the tourism attractors. This suggests that tourism policy, often formulated solely in terms of tourism attractors, needs to also take account of business and industry factors. This paper also points to the need for a strategic management approach within tourism organisations to better identify the influence of such internal and external industry and tourism based factors and to develop appropriate strategies to deal in a proactive manner with such influences. Such a strategic management approach is essential to the identification of how best to meet the demands of tourists in a manner likely to deliver satisfaction levels well above expectations, thereby inducing visitors to stay longer within a destination.

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