TOURISM QUEENSLAND

Caloundra Visitor Survey

Final Report

June 2004

Report prepared by the Tourism Queensland Research Department

Contents

1 Introduction

The Caloundra Visitor Survey was undertaken by the Tourism Queensland Research Department, in association with Caloundra Tourism, to assist in developing a better understanding of the existing market (or markets) for Caloundra.

The overall outcome of the research is to help guide the development of Caloundra. It is anticipated that information gathered from this research will be used by Tourism Queensland, Caloundra Tourism, government and tourism operators to maximise tourism in the area and to provide input into future directions and marketing strategies.

The specific objectives of the research are:
- to profile visitors to Caloundra in terms of demographics and travel behaviour;
- to measure visitor satisfaction and appeal with specific aspects of Caloundra; and
- to identify differences in the profile and opinions of visitors at different time periods.

This report presents the findings of the June 2004 Caloundra Visitor Survey, the fourth wave of this study in the Caloundra region.

2 Methodology

For the purposes of this study "Caloundra" refers to the Caloundra City Council area and includes the following townships: Caloundra, Kawana, Conondale, Witta, Maleny, Mooloolah, Glass House Mountains, Landsborough, Beerwah, Beerburrum, Minyama, Currimundi, Golden Beach and Pelican Waters.

The questionnaire used for the study was designed by Tourism Queensland and is based on the Standard Visitor Survey. The questionnaire included questions about visitor demographics, travel behaviour and satisfaction.

The survey period for wave one ran from 8th January to 21st January 2003, coinciding with Australian school summer holidays (throughout the report, wave one is referred to as January 2003). In total, 403 surveys were completed for wave one.

The survey period for wave two ran from Saturday 7th June to Wednesday 25th June 2003. The interviewing period for this wave did not coincide with any Australian school holidays (throughout the report, wave two is referred to as June 2004). In total 329, interviews were completed for this implementation of the study.

The survey period for wave three ran from Saturday 10th January to Monday 26th January 2004. The interview period for wave three coincided with Australian school summer holidays (throughout the report, wave three is referred to as January 2004). In total, 421 surveys were completed for wave three.

The survey period for wave four ran from Sunday 6th June to Wednesday 23rd June 2004. The interview period for wave four did not coincide with any Australian school holidays (throughout the report, wave four is referred to as June 2004). In total, 421 interviews were completed for wave four.

Interviewers were commissioned from Oaki Doaki Business Consultants and trained by Tourism Queensland staff. Interviewers recruited respondents by randomly intercepting passers-by at various locations around the Caloundra region.

The locations of interviewing and the proportion of interviews completed at each, for all four waves, are as follows:

Interview Location	**Jan-03**	**Jun-03**	**Jan-04**	**Jun-04**
	%	**%**	**%**	**%**
Maple St	10%	23%	9%	11%
Mary Cairncross Park	19%	22%	32%	37%
Bulcock St	21%	16%	10%	13%
Bulcock Beach	10%	10%	7%	11%
Kings Beach	24%	7%	23%	11%
Dicky Beach	-	6%	-	-
Golden Beach	-	5%	-	0.2%
Happy Valley	-	3%	-	-
Caloundra	-	2%	3%	-
Caloundra Hospital Markets	-	2%	-	-
Moffat Beach	-	2%	5%	15%
Sunland Shopping Centre	-	2%	-	-
Golden Beach Foreshore	-	2%	-	-
Bunya St, Maleny	-	0.3%	-	-
Golden Beach Shopping Centre	-	0.3%	-	-
Currimundi	2%	-	-	1%
Australia Zoo				1%
Maleny	15%	-	11%	-
	100%	**100%**	**100%**	**100%**

Data from all completed questionnaires was entered into a database and prepared for analysis. Analysis was undertaken using *SPSS* statistical analysis software and includes frequencies, cross-tabulation and means comparisons. The results are presented graphically in tables and graphs supplemented with written comment and interpretation.

Each question in the survey was analysed by cross-tabulation (or by means comparison for scaled questions) to find any notable differences between different groups of respondents. Note the data has not been weighted and statistical testing has not been conducted, hence the results in this report refer to the survey sample only, and cannot be extrapolated to the general population. The **sub-groups** of particular interest for this research are determined by their **origin** and **survey wave**.

To improve the validity of results at the subgroup level some variables were recoded, collapsing some response categories to allow for more robust subgroup sample sizes.

The results are presented graphically in tables and graphs supplemented with written comment and interpretation. Both top-line (whole sample) and sub-group results are presented. Results from the June 2004 survey are represented as 'Jun-04' in graphs and tables, while results from the first, second and third waves of the study (January 2003, June 2003 and January 2004) are represented as 'Jan-03', 'Jun-03' and 'Jan-04'.

3 Top Line Findings

This section presents the top line findings of the June 2004 Caloundra Visitor Survey. The findings are presented in an order considered appropriate and relevant to the client's needs and not necessarily in the order questions were asked of respondents.

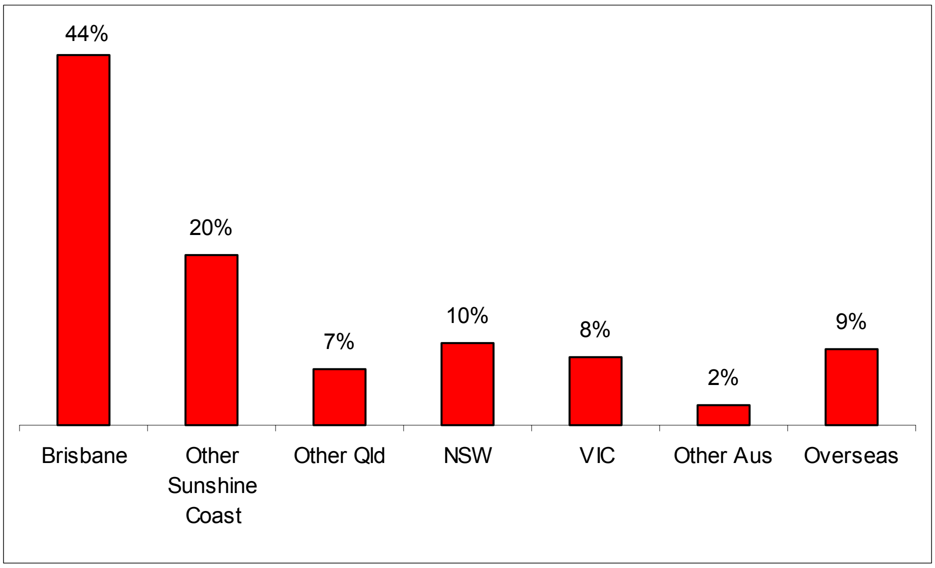
3.1 Visitor Details

The survey included a number of questions about respondents.

3.1.1 Origin

Almost three quarters of the respondents are from intrastate (71%), with 44% from Brisbane, 20% from other areas of the Sunshine Coast and 7% from other Queensland regions. One in ten respondents are from New South Wales and Victoria each (10% and 8% respectively), while the overseas market represents 9% of respondents.

Origin

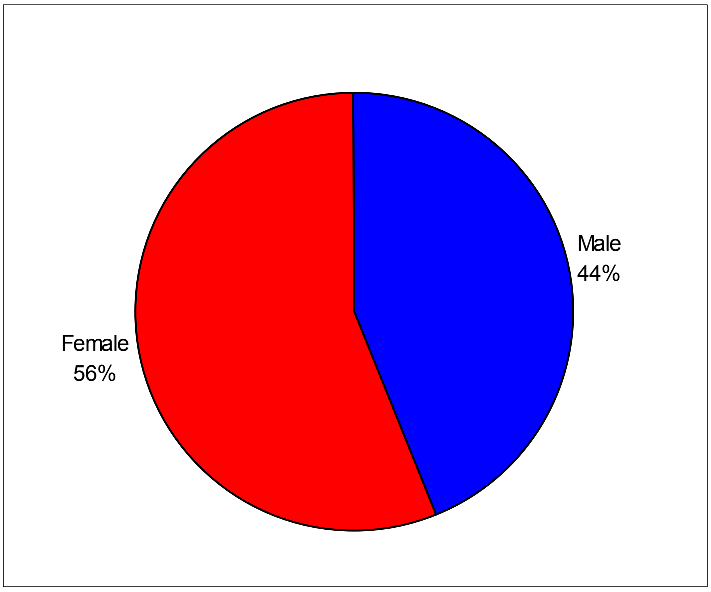


Base: All respondents (n=421)

3.1.2 Sex

A larger proportion of females were interviewed (56%).

Sex

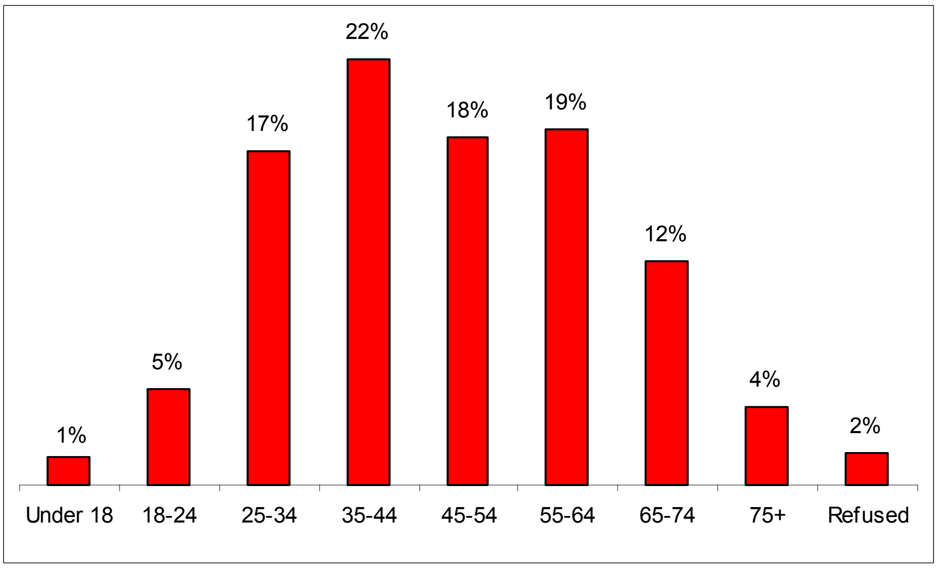


Base: All respondents (n=421)

3.1.3 Age

There is a range of ages represented within the sample group; however, three-quarters of respondents are aged between 25 and 64 years (76%).

Age Group

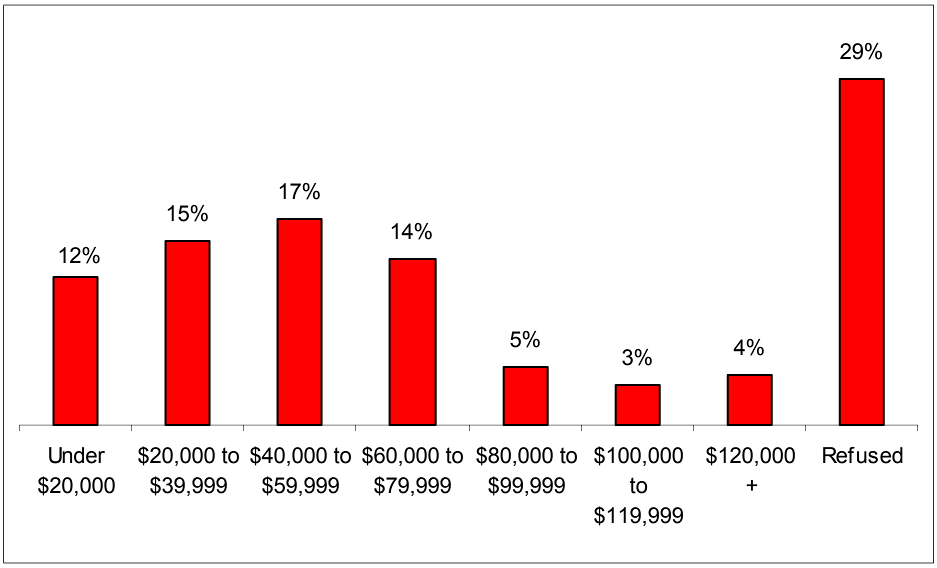


Base: All respondents (n=420)

3.1.4 Income

One in four respondents have an annual household income less than $39,999 (27%).

Household Income

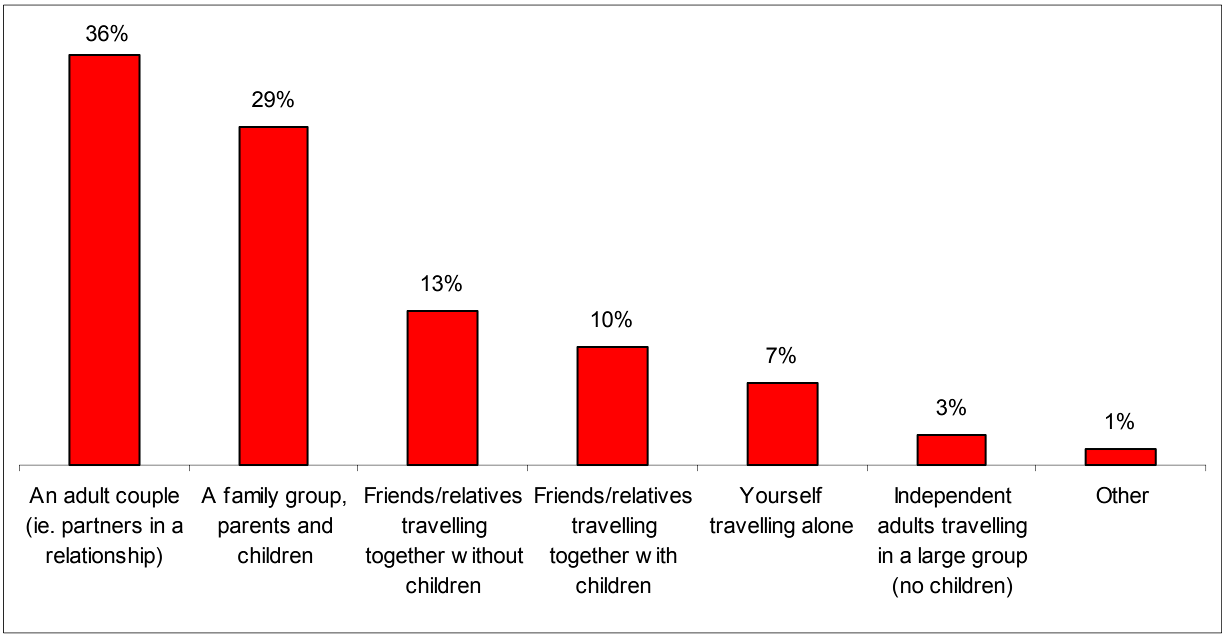


Base: All respondents (n=412)

3.1.5 Travel Party

One third of respondents travelled as an adult couple on their visit to Caloundra (36%). Thirty-nine percent (39%) of respondents travelled with children. These respondents were either in a family group or friends/relatives travelling together with children (29% and 10% respectively). Only 7% of respondents were travelling alone.

Travel Party



Base: All respondents (n=418)

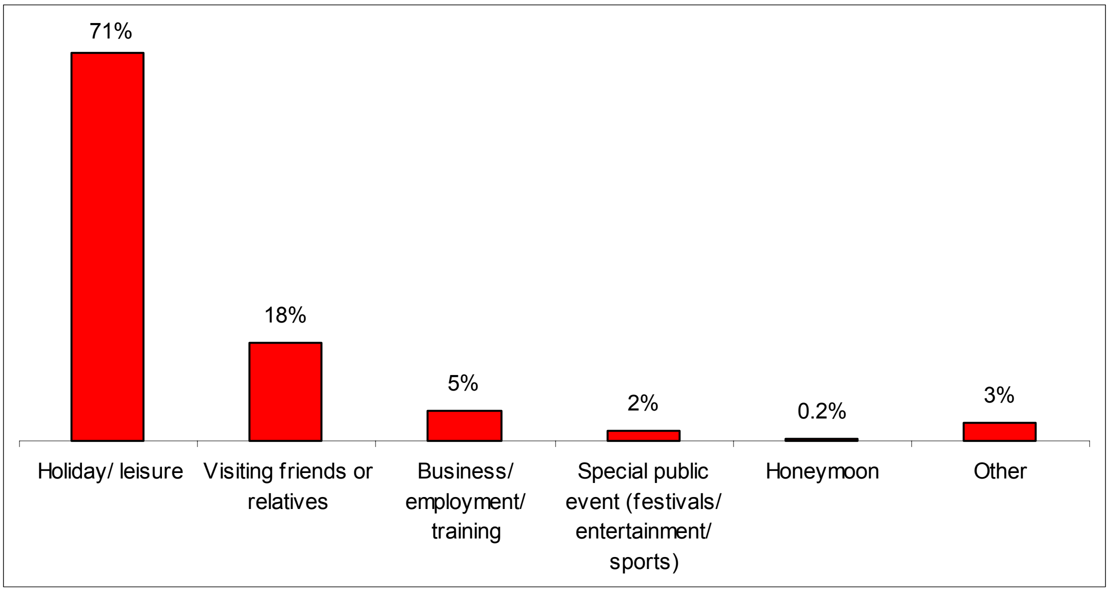
3.2 Details of the Visit

The questionnaire included a number of questions about respondents' current visit to Caloundra.

3.2.1 Main Purpose

Respondents were asked the main purpose of their trip to Caloundra. Most respondents were visiting for holiday/leisure purposes (71%). A small proportion of respondents travelled to Caloundra to visit friends or relatives (18%).

Main Purpose of Trip

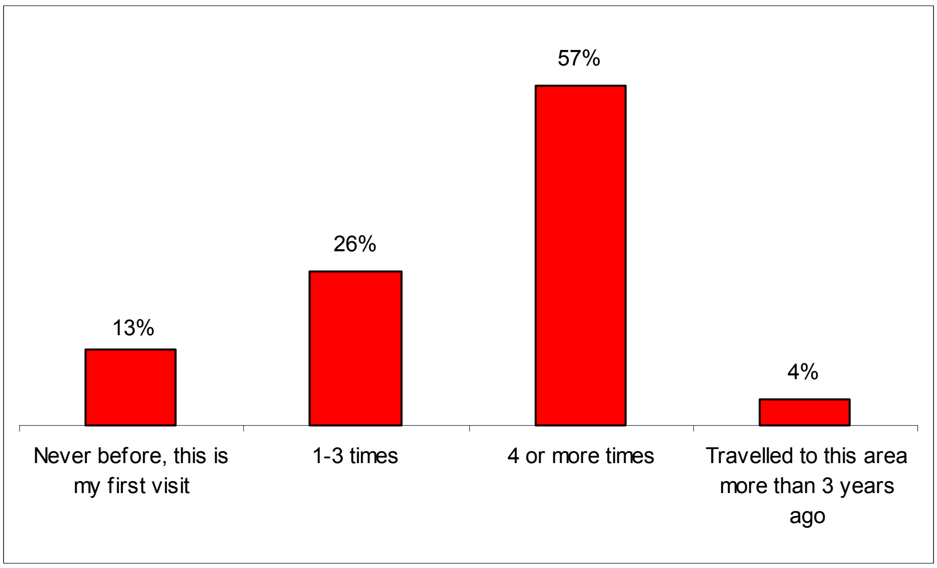


Base: All respondents (n=421)
'Other' consists of a range of purposes each mentioned by fewer than 3% of respondents

3.2.2 Previous Visitation

Most respondents had visited the region before, with more than three quarters having visited Caloundra at least one other time in the previous three years (83%).

Number of Visits to Caloundra in the Last Three Years

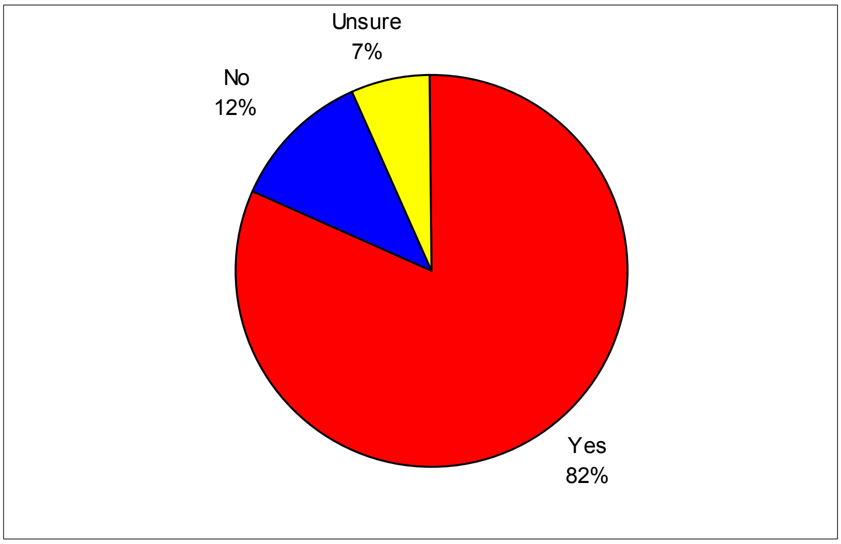


Base: All respondents (n=420)

3.2.3 Plan to Return to Caloundra

The majority of respondents (82%) indicated that they planned to return to the Caloundra region for a holiday in the next three years.

Plan to Return to Caloundra

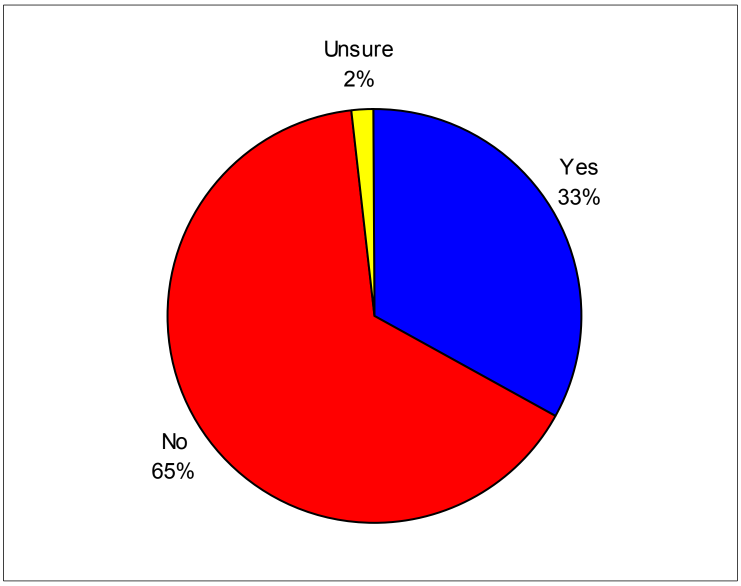


Base: All respondents (n=414)

3.2.4 Advertising Recall

Respondents were asked whether they recalled seeing any advertising for the Caloundra region before leaving home. One third of respondents recalled seeing some form of advertising relating to the Caloundra region (33%).

Advertising Recall

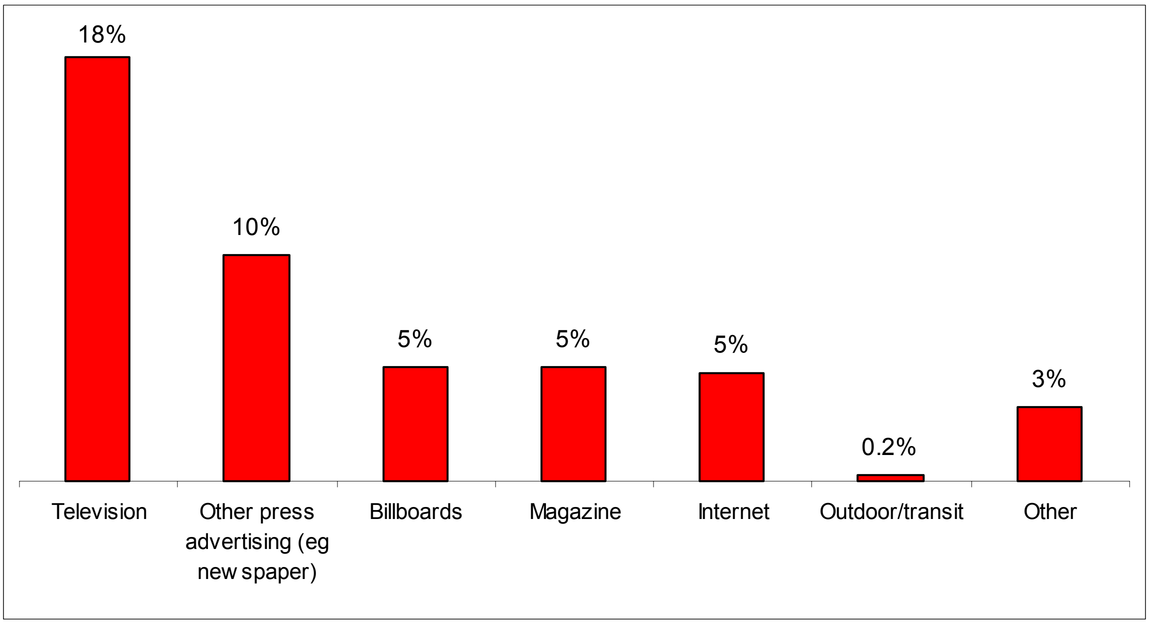


Base: All respondents (n=420)

3.2.5 Advertising Medium Recall

Respondents were also asked through which mediums they recalled seeing the advertising for the Caloundra region. One in five respondents saw advertising for the Caloundra region on television (18%), while one in ten respondents saw other press advertising (e.g. newspaper) (10%).

Advertising Mediums Recalled

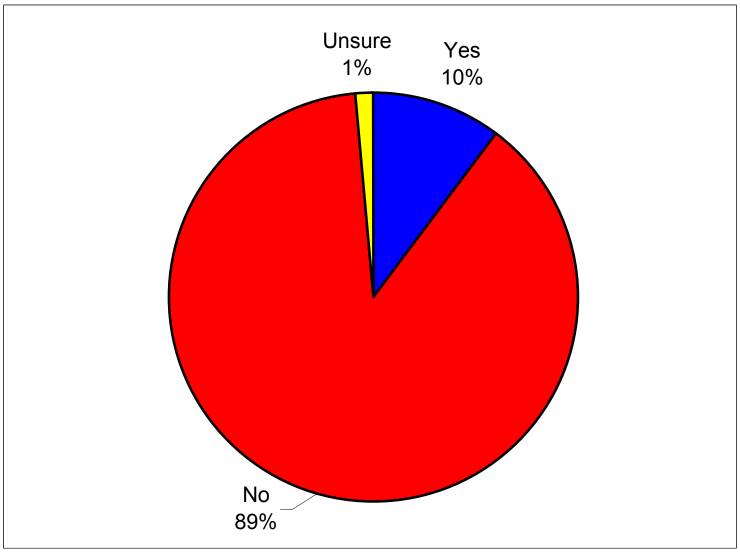


Multiple responses accepted
'Other' consists of a range of mediums each mentioned by fewer than 3% of respondents

3.2.6 Slogan "Lazy Days, Play Days, Every Day" Recall

Respondents were asked if they had heard the Caloundra slogan "Lazy days, play days, every day". Only one in ten respondents had heard the slogan (10%).

Slogan Recall

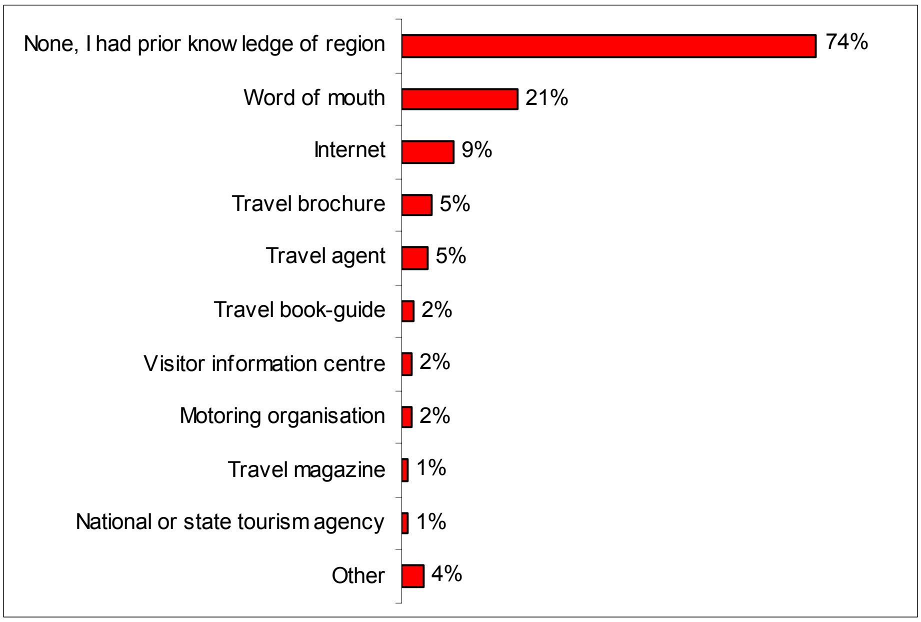


Base: All respondents (n=421)

3.2.7 Information Sources

Respondents were asked about the information sources they used when planning their trip to the Caloundra region. Three-quarters of respondents did not source information as they had prior knowledge of the area (74%). Some common sources of information that people did utilise were word of mouth (21%), and the Internet (9%).

Information Sources

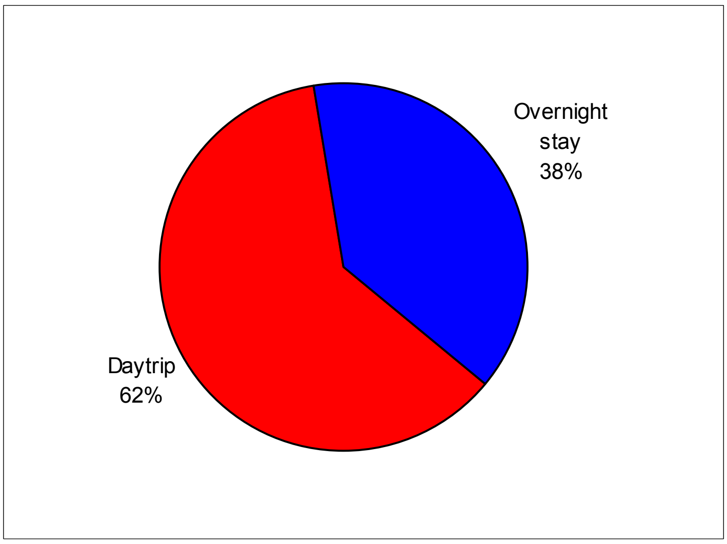


Multiple responses accepted
'Other' consists of a range of information sources each mentioned by fewer than 3% of respondents

3.2.8 Daytrip/Overnight Stay

Most respondents were on a daytrip in the Caloundra region (62%).

Daytrip/Overnight Stay

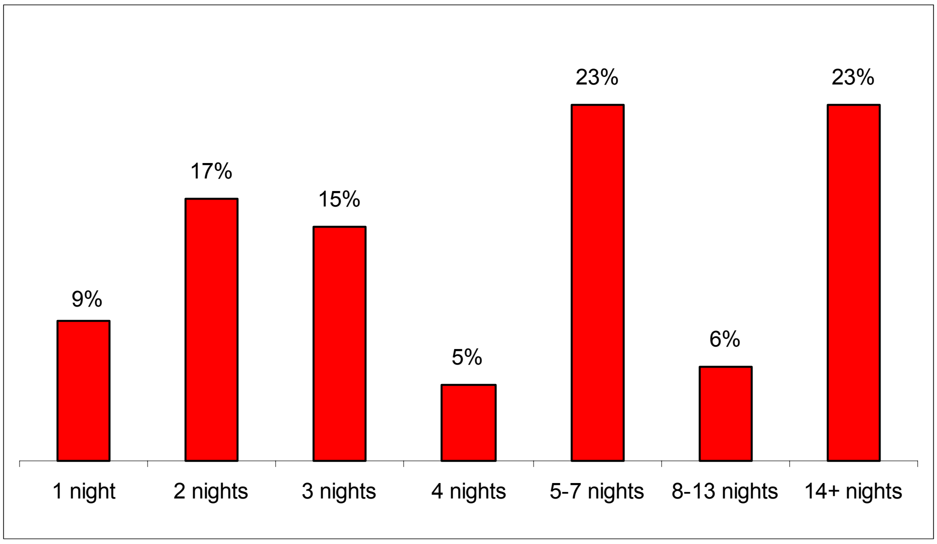


Base: All respondents (n=421)

3.2.9 Length of Stay

Overnight visitors were asked how many nights they were spending in the Caloundra region. Half of overnight visitors were staying for five or more nights (52%), with a large proportion of respondents staying for two weeks or more (23%). One in four overnight visitors were staying for one or two nights (26%).

Length of Stay

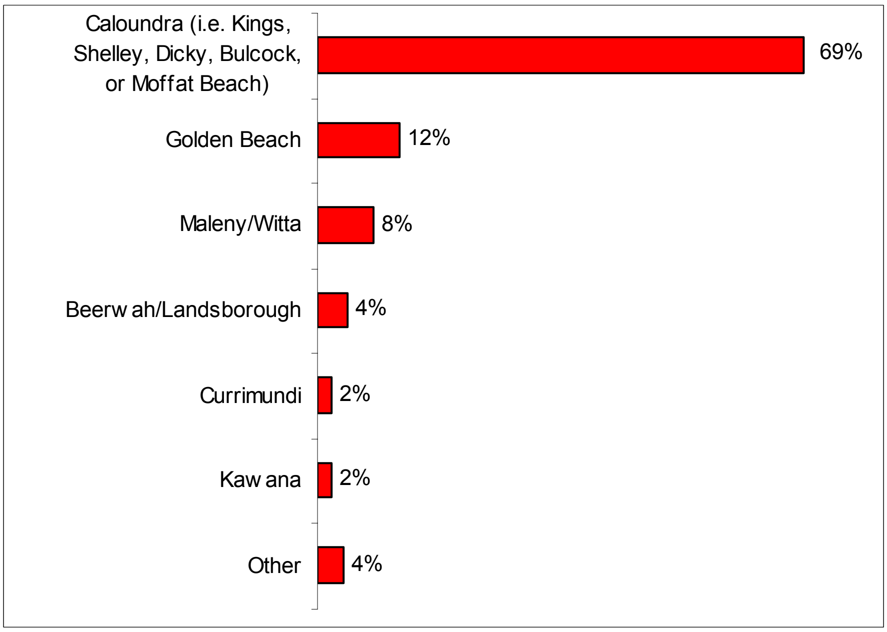


Base: Overnight visitors (n=162)

3.2.10 Accommodation Location

Most overnight visitors were staying at Caloundra Beaches (69%). Twelve percent (12%) of overnight visitors stayed in Golden Beach, while 8% of overnight visitors stayed in Maleny/Witta.

Location of Accommodation

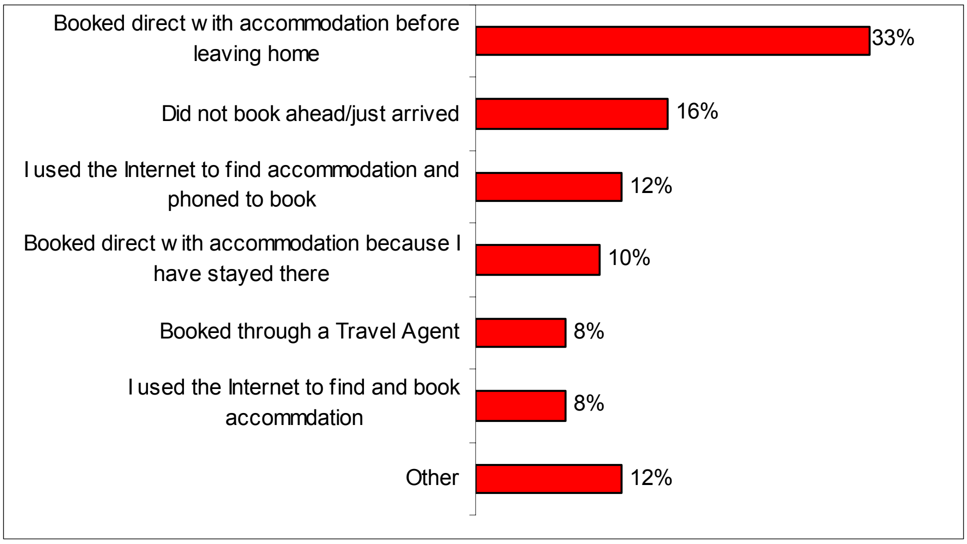


Base: Overnight visitors (n=162)

3.2.11 Accommodation Booking

The majority of overnight visitors staying in commercial accommodation booked/organised their accommodation prior to arriving with only 16% of overnight visitors staying in commercial accommodation indicating that they did not book ahead/just arrived. The most common form of booking accommodation was with the accommodation establishment directly, with half of overnight visitors staying in commercial accommodation using this method (55%).

Method of Booking Accommodation

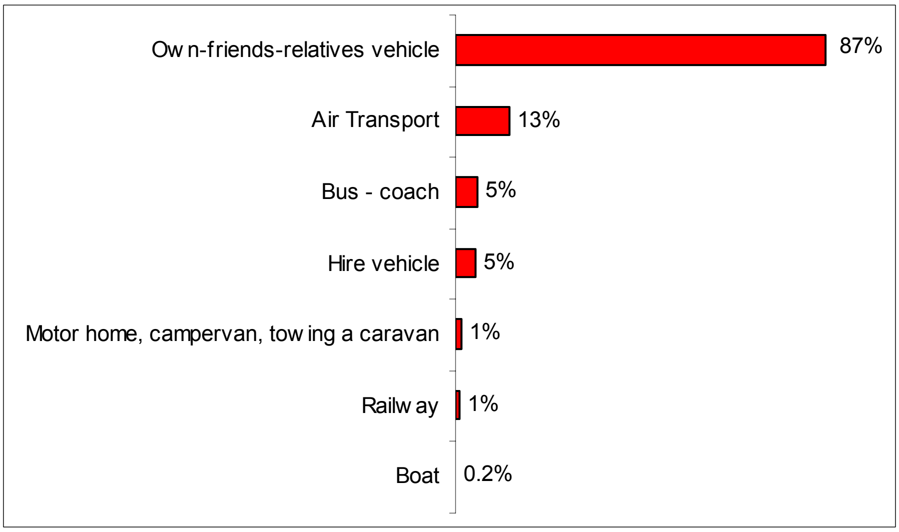


Base: Overnight visitors who stayed in commercial accommodation
'Other' consists of a range of methods of booking accommodation each mentioned by fewer than 3% of respondents

3.2.12 Form of Transportation

The majority of respondents used their own/friends/relatives or a hire vehicle on their journey to the Caloundra region (92%), while a significant proportion of respondents used air transport on their journey (13%).

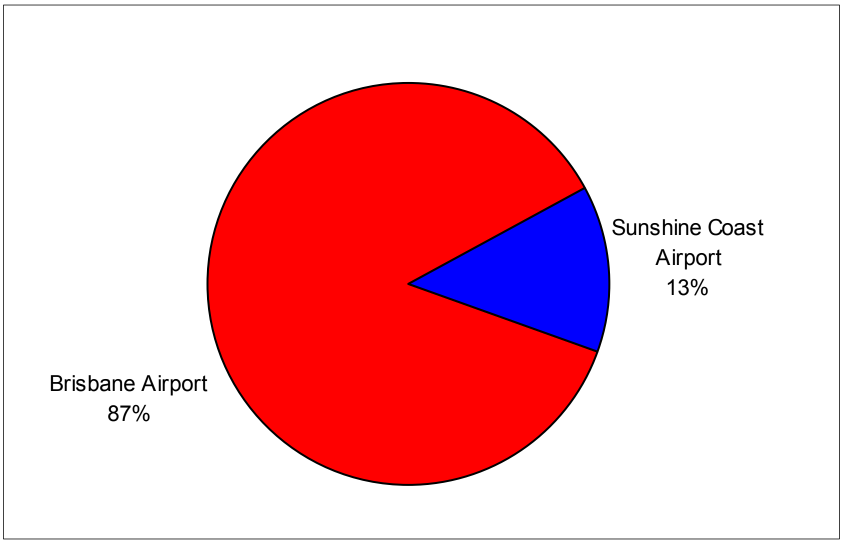
Form of Transport Used



Multiple responses accepted

Of those visitors who travelled to the Caloundra region via air transport, the majority flew into Brisbane Airport (87%), while the remaining 13% flew in to the Sunshine Coast Airport.

Airport Arrival

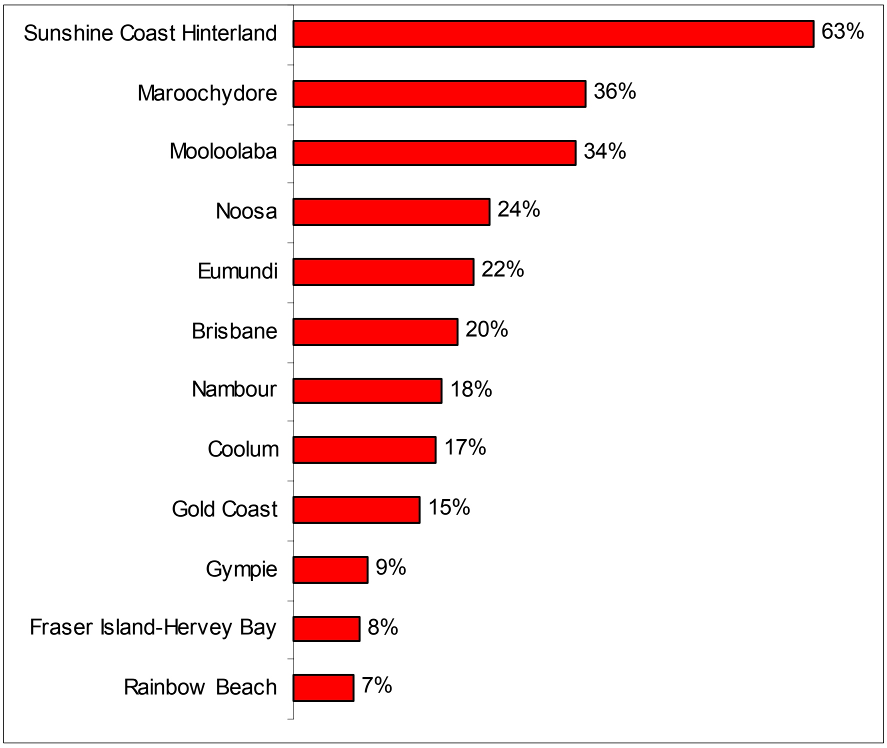


Base: Visitors who used air transport (n=54)

3.2.13 Places Visited

Respondents were asked if they had visited or planned to visit a number of locations on their current trip. The Sunshine Coast Hinterland was the most popular location to visit (63%). Maroochydore and Mooloolaba were also popular places to visit (36% and 34% respectively). Other locations that respondents visited or planned to visit included Noosa, Eumundi and Brisbane (24%, 22% and 20% respectively).

Places Visited During Trip

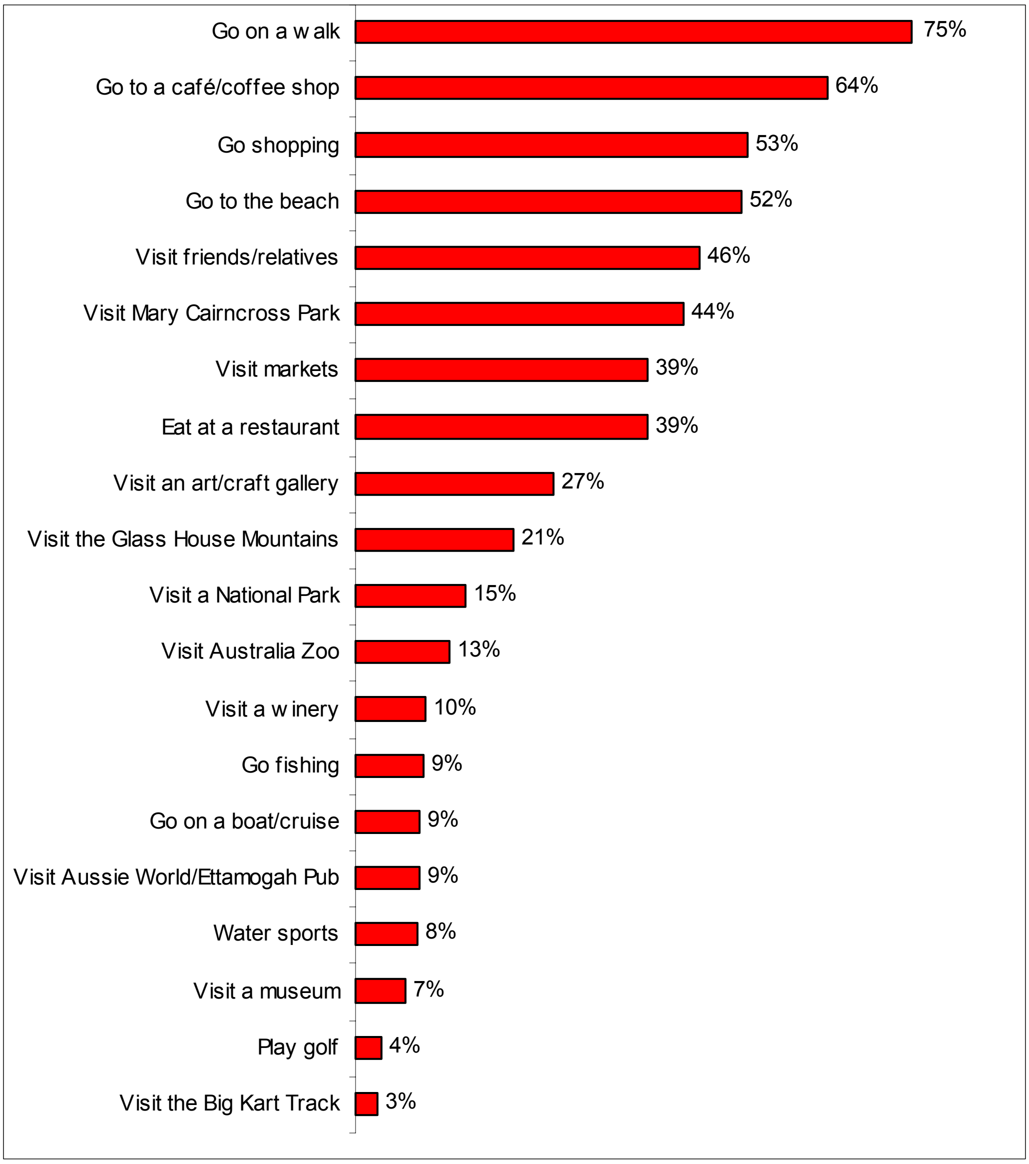


Multiple responses accepted

3.2.14 Activities

Respondents were asked what activities they had participated in (or planned to participate in) during their stay in the Caloundra region. The most popular activities were going on a walk (75%) going to a café/coffee shop (64%), going shopping (53%), going to the beach (52%) and visiting friends and relatives (46%). Visiting Mary Cairncross Park was also a popular activity (44%), however it should be noted that more than a third of interviews took place at Mary Cairncross Park (37%).

Activities



Multiple responses accepted

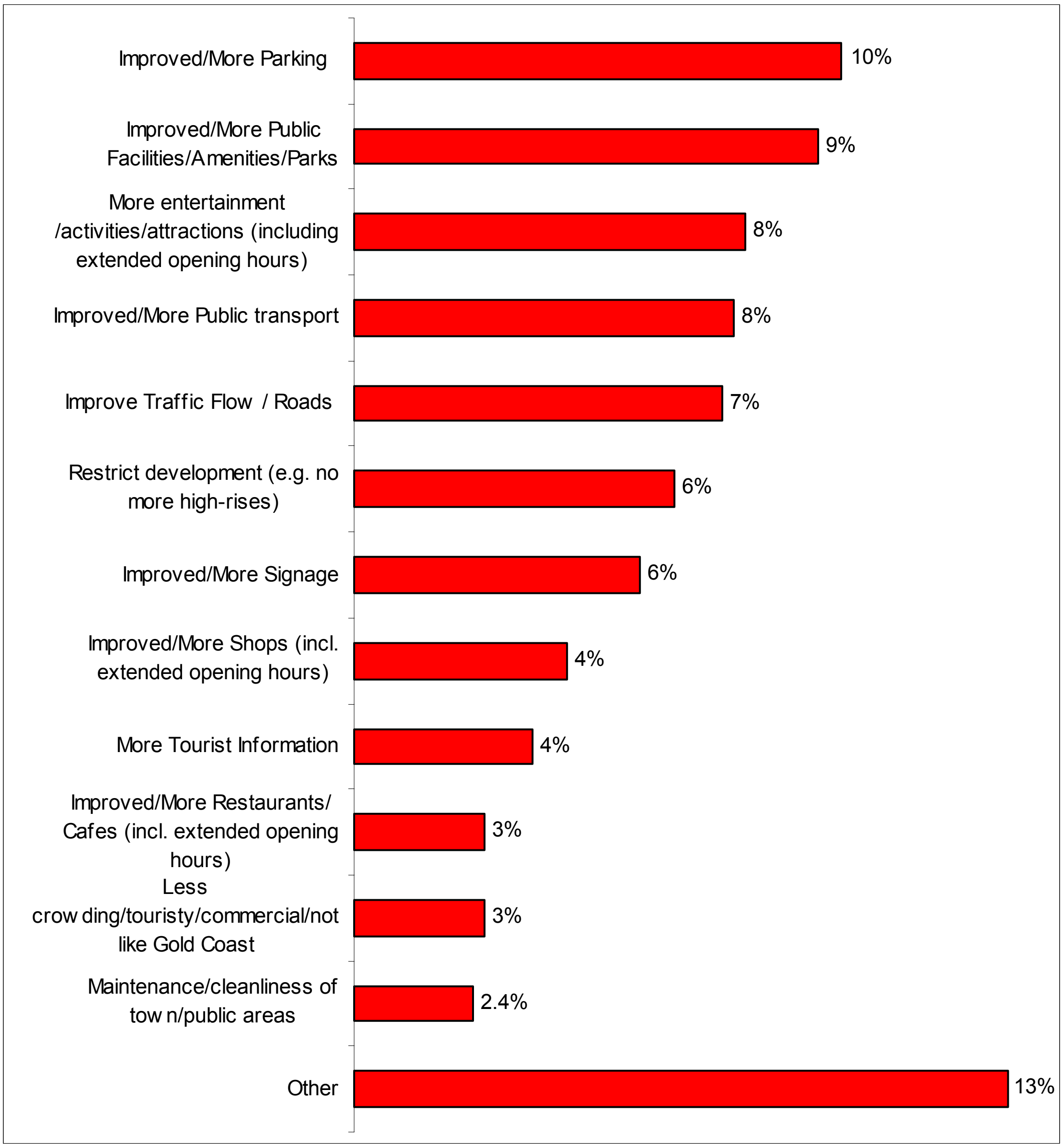
3.3 Opinions and Satisfaction

Respondents were asked what improvements they think could be made to Caloundra to make the area more enjoyable for visitors. They were also asked to rate their satisfaction with a number of aspects relating to their visit to Caloundra and to indicate how they would like to see Caloundra develop in the next five years.

3.3.1 Possible Improvements

When asked for possible improvements to the area, 10% of respondents suggested improved/more parking. Other improvements suggested were to improve or provide more public facilities/amenities/parks (9%), to provide more entertainment/activities/attractions (8%), to provide more or improve public transport (8%) and to improve Caloundra's roads and traffic flow (7%). Six percent (6%) of respondents indicated that an improvement to the area would be to see development restricted, with no high rises being a common response.

Possible Improvements



Multiple responses accepted
'Other' consists of a range of responses, each mentioned by fewer than 2% of respondents
See Appendix A for a full list of 'Other' responses

3.3.2 Visitor Satisfaction

Respondent satisfaction with a number of aspects of Caloundra was measured on a five-point scale where one equals very dissatisfied and five equals very satisfied.

The top five mean ratings received were for the beaches (4.64), the range of accommodation (4.59), the friendliness of locals (4.48), accommodation-value for money (4.39) and that there is lots to see and do in Caloundra (4.37).

The bottom five mean ratings received were for the availability of public transport (2.76), the nightlife/entertainment (3.24), the attractions-value for money (3.83), the car park facilities (3.84), and the Caloundra CBD streetscape (3.87). However it should be noted that public transport was the only aspect in which the mean was below the scale midpoint of 3 (neutral).

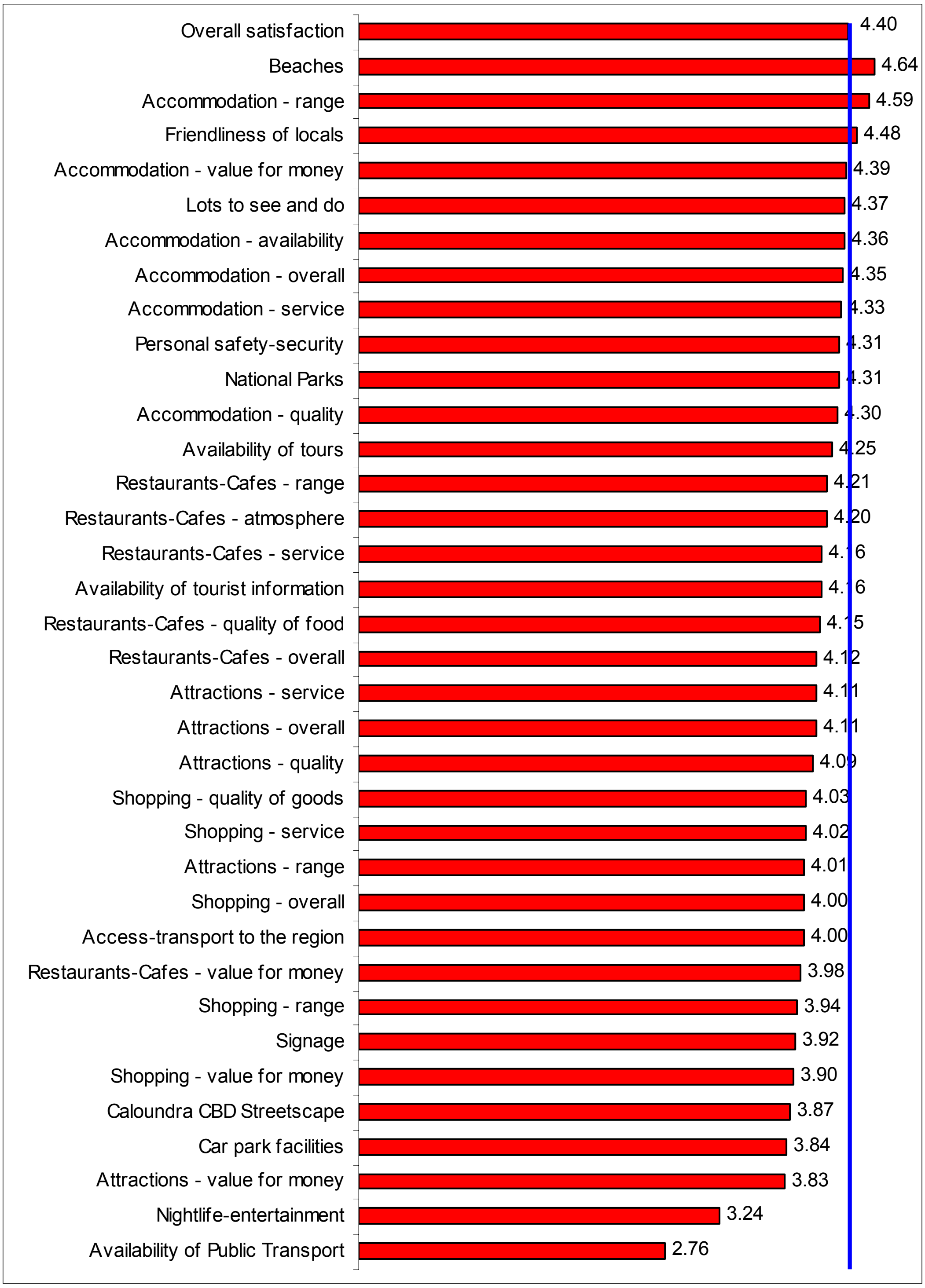
Almost all respondents were either satisfied or very satisfied with their overall experience in the Caloundra region (94%). Only 1% (2 respondents) indicated that they were dissatisfied with their overall experience, with six percent rating their overall satisfaction as neutral.

Satisfaction with Aspects of Caloundra

	N	Mean	TOTAL Dissatisfied	1	2	Neutral 3	4	5	TOTAL Satisfied
Beaches	346	4.64	**0%**	0%	0%	**6%**	23%	71%	**94%**
Accommodation - range	94	4.59	**1%**	1%	0%	**3%**	31%	65%	**96%**
Friendliness of locals	382	4.48	**2%**	1%	1%	**5%**	35%	58%	**93%**
Accommodation - value for money	96	4.39	**3%**	1%	2%	**9%**	32%	55%	**88%**
Lots to see and do	392	4.37	**2%**	0%	2%	**11%**	35%	52%	**87%**
Accommodation - availability	97	4.36	**6%**	4%	2%	**5%**	31%	58%	**89%**
Accommodation - overall	96	4.35	**3%**	2%	1%	**9%**	34%	53%	**88%**
Accommodation - service	87	4.33	**2%**	2%	0%	**13%**	32%	53%	**85%**
Personal safety-security	395	4.31	**3%**	2%	2%	**9%**	39%	49%	**88%**
National Parks	220	4.31	**3%**	2%	1%	**9%**	40%	48%	**88%**
Accommodation - quality	98	4.30	**3%**	2%	1%	**16%**	27%	54%	**81%**
Availability of tours	83	4.25	**4%**	2%	1%	**11%**	40%	46%	**86%**
Restaurants-Cafes - range	287	4.21	**3%**	0%	3%	**14%**	41%	41%	**83%**
Restaurants-Cafes - atmosphere	290	4.20	**1%**	0%	1%	**15%**	46%	38%	**84%**
Restaurants-Cafes - service	285	4.16	**2%**	1%	2%	**13%**	49%	35%	**84%**
Availability of tourist information	241	4.16	**7%**	3%	4%	**14%**	34%	46%	**80%**
Restaurants-Cafes - quality of food	288	4.15	**3%**	1%	2%	**14%**	49%	35%	**84%**
Restaurants-Cafes - overall	289	4.12	**2%**	0%	2%	**15%**	52%	31%	**83%**
Attractions – service	184	4.11	**5%**	2%	3%	**14%**	45%	36%	**81%**
Attractions – overall	187	4.11	**4%**	2%	3%	**11%**	53%	32%	**85%**
Attractions – quality	189	4.09	**5%**	2%	3%	**13%**	50%	33%	**83%**
Shopping - quality of goods	236	4.03	**3%**	0%	3%	**19%**	48%	29%	**77%**
Shopping – service	239	4.02	**4%**	0%	3%	**18%**	51%	28%	**78%**
Attractions – range	199	4.01	**8%**	2%	6%	**14%**	48%	31%	**79%**
Shopping – overall	239	4.00	**3%**	0%	3%	**21%**	48%	28%	**76%**
Access-transport to the region	333	4.00	**8%**	3%	6%	**15%**	42%	35%	**76%**
Restaurants-Cafes - value for money	287	3.98	**3%**	2%	1%	**21%**	48%	28%	**76%**
Shopping – range	248	3.94	**6%**	0%	6%	**22%**	42%	29%	**72%**
Signage	388	3.92	**11%**	3%	8%	**16%**	42%	32%	**73%**
Shopping - value for money	234	3.90	**5%**	0%	5%	**24%**	47%	24%	**71%**
Caloundra CBD Streetscape	311	3.87	**7%**	4%	4%	**23%**	40%	29%	**69%**
Car park facilities	386	3.84	**15%**	6%	9%	**14%**	37%	34%	**71%**
Attractions - value for money	188	3.83	**7%**	3%	4%	**22%**	47%	23%	**70%**
Nightlife-entertainment	80	3.24	**33%**	16%	16%	**13%**	38%	18%	**55%**
Availability of Public Transport	103	2.76	**42%**	29%	13%	**25%**	19%	14%	**33%**
Overall satisfaction	**400**	**4.40**	**1%**	**0%**	**1%**	**6%**	**47%**	**47%**	**94%**

Scale: 1= Very Dissatisfied; 2=Dissatisfied; 3=Neutral; 4= Satisfied 5= Very Satisfied

Satisfaction with Aspects of Caloundra (Means*)*

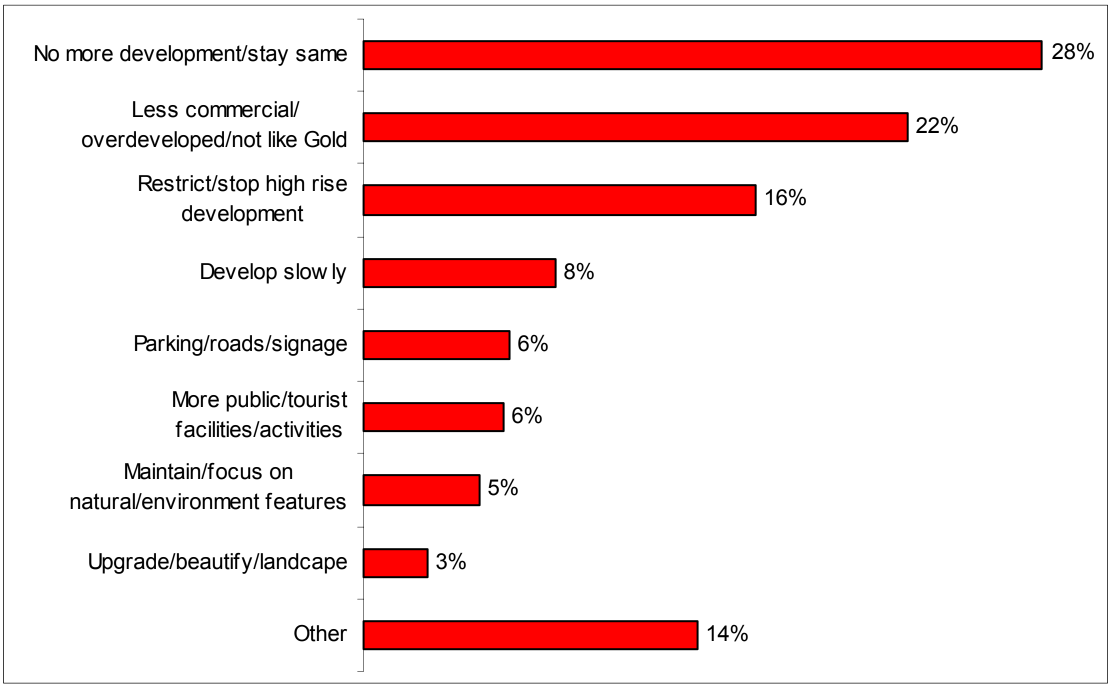


Base size varies for each statement – details are provided in the table on the previous page

3.3.3 Development of Caloundra

Respondents were asked how they would like to see Caloundra develop in the next five years. One in four respondents said they would like no more development in Caloundra/it should stay the same (28%). One in five respondents said development should be less commercial or overdeveloped and less like the Gold Coast or Maroochydore/Mooloolaba (22%). Sixteen percent (16%) of respondents indicated that they would like to see development restricted particularly restricting/stopping high-rise development.

Development of Caloundra



Multiple responses accepted
'Other' consists of a range of responses, each mentioned by fewer than 3% of respondents
See Appendix B for a full list of 'Other' responses

4 Differences by Origin

This section presents results for sub groups based on **Origin**. The sub groups included in the results and the sample sizes for each are as follows. For some sections results are shown for intrastate and interstate visitors only because of limited sample size for overseas visitors.

Sub-group	Sample Size
Intrastate visitors	297
Interstate visitors	86
Overseas visitors	38**
TOTAL	**421**

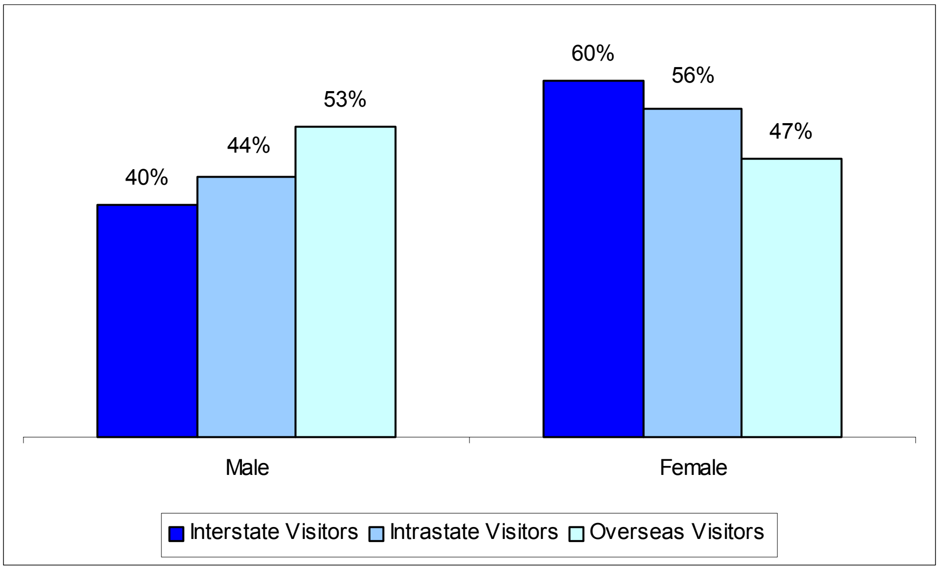
** Results for overseas visitors are based on very small sample sizes and therefore should be used cautiously.

4.1 Visitor Details by Origin

4.1.1 Sex by Origin

A higher proportion of interstate and intrastate visitors were females, while a higher proportion of overseas visitors were males.

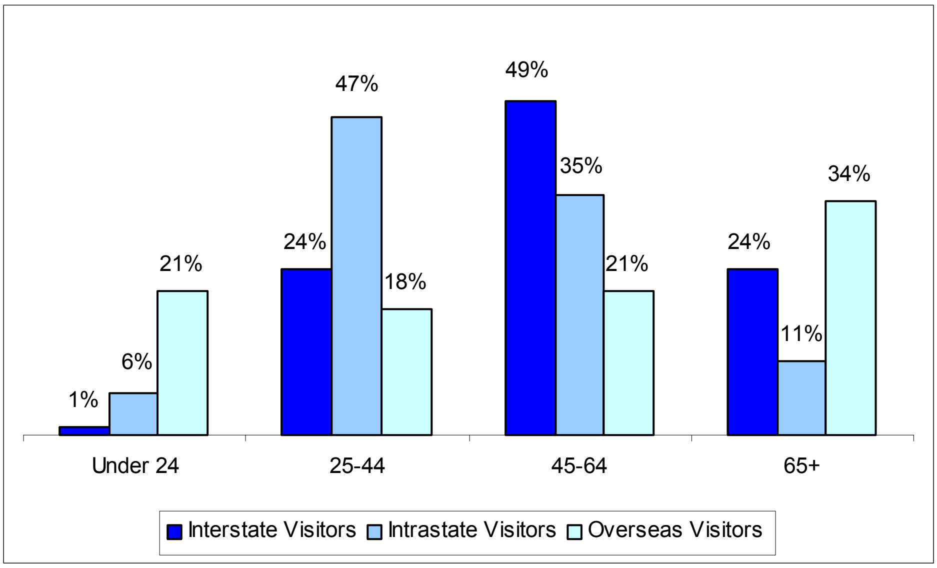
Sex by Origin



4.1.2 Age by Origin

The majority of interstate travellers were aged 45 years and over, while the majority of intrastate travellers were aged 25-64. Overseas visitors were a range of ages.

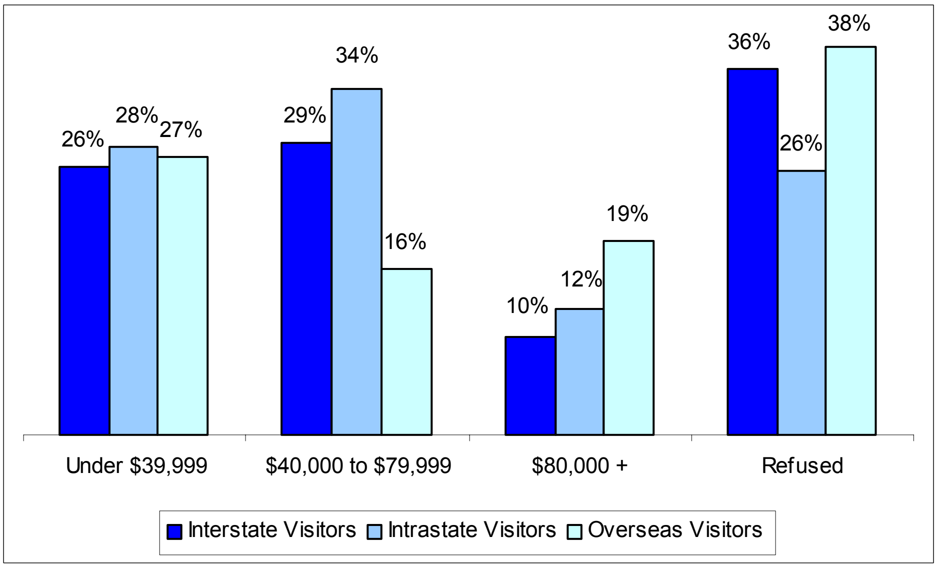
Age Group by Origin



4.1.3 Income by Origin

Overseas visitors were more common in the $80,000 + age bracket than interstate and intrastate visitors.

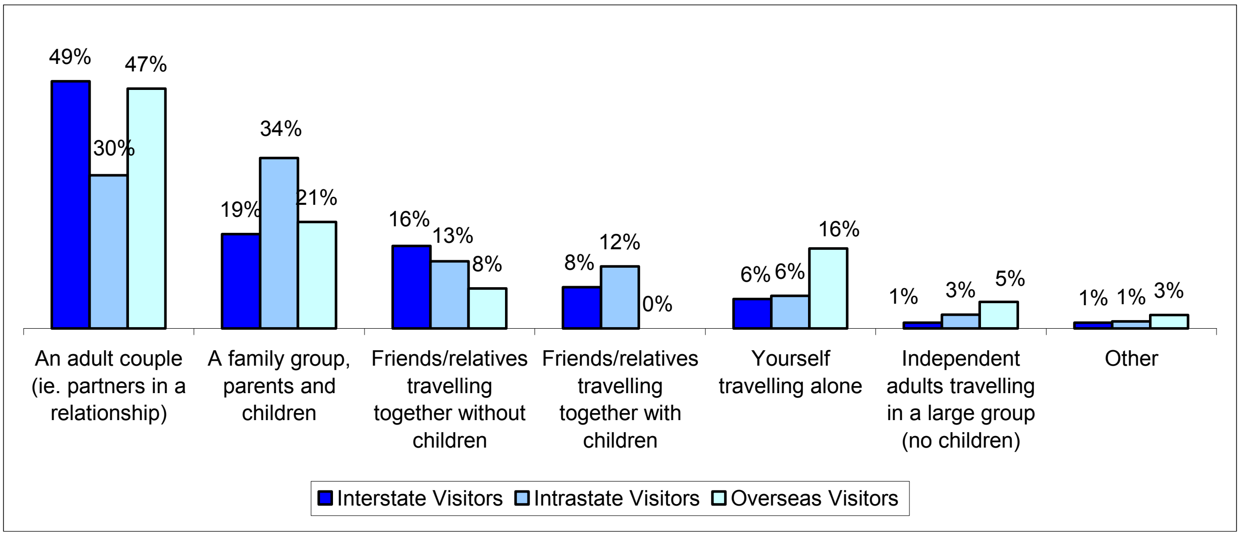
Household Income by Origin



4.1.4 Travel Party by Origin

The most common travel party for interstate and overseas visitors was an adult couple, whereas a family group was the most common travel party for intrastate visitors. In addition intrastate visitors were most likely to be travelling with children.

Travel Party by Origin



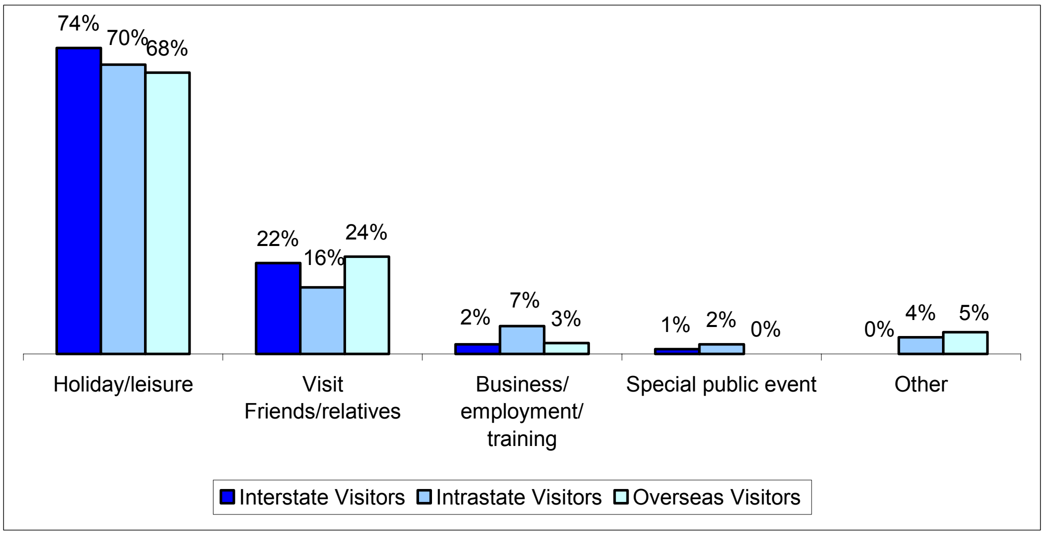
'Other' consists of a range of travel parties each mentioned by fewer than 3% of respondents

4.2 Details of the Visit by Origin

4.2.1 Main Purpose by Origin

Holiday/leisure was the most common purpose for travel to Caloundra for all visitors. Intrastate visitors were more likely to be visiting for business reasons, compared to overseas and interstate travellers.

Main Purpose of Trip by Origin

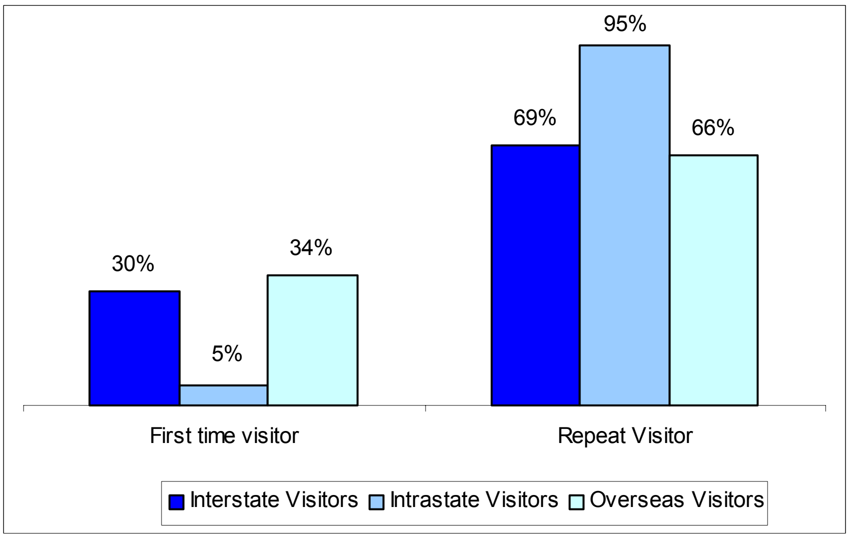


'Other' consists of a range of purposes each mentioned by fewer than 3% of respondents

4.2.2 Previous Visitation by Origin

Interstate and overseas visitors were more likely than intrastate visitors to be visiting Caloundra for the first time.

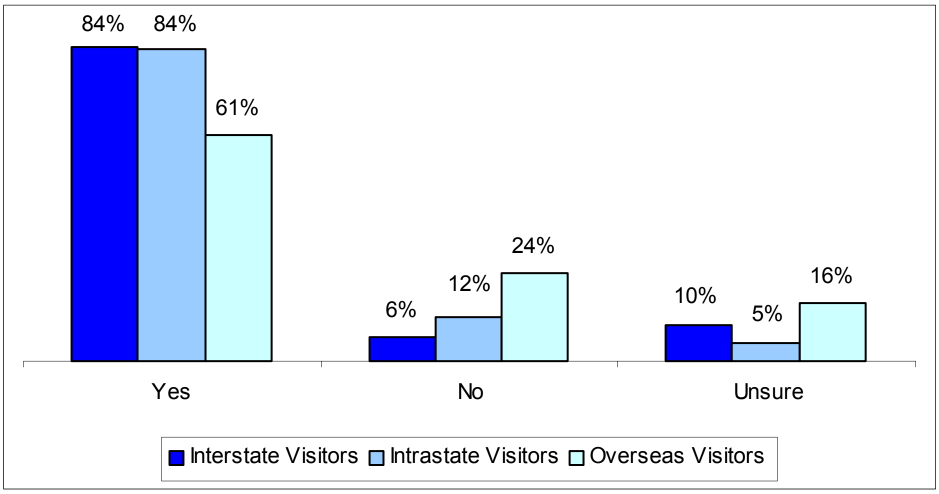
Previous Visitation



4.2.3 Plan to Return to Caloundra by Origin

The majority of interstate, intrastate and overseas visitors indicated that they planned to return to Caloundra for a holiday in the next three years.

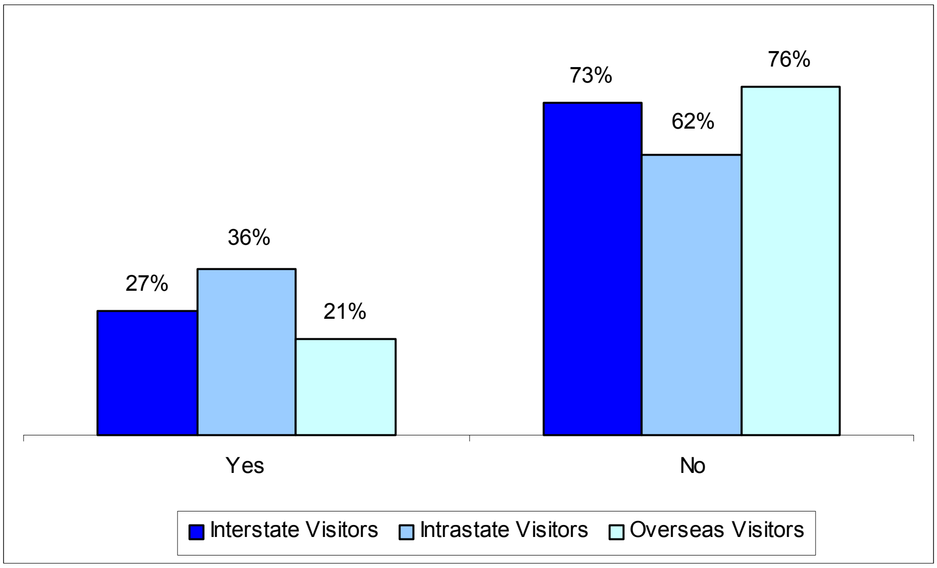
Plan to Return to Caloundra in the Next Three Years by Origin



4.2.4 Advertising Recall by Origin

One third of intrastate visitors had seen advertising for Caloundra, while only one in five overseas visitors had seen advertising.

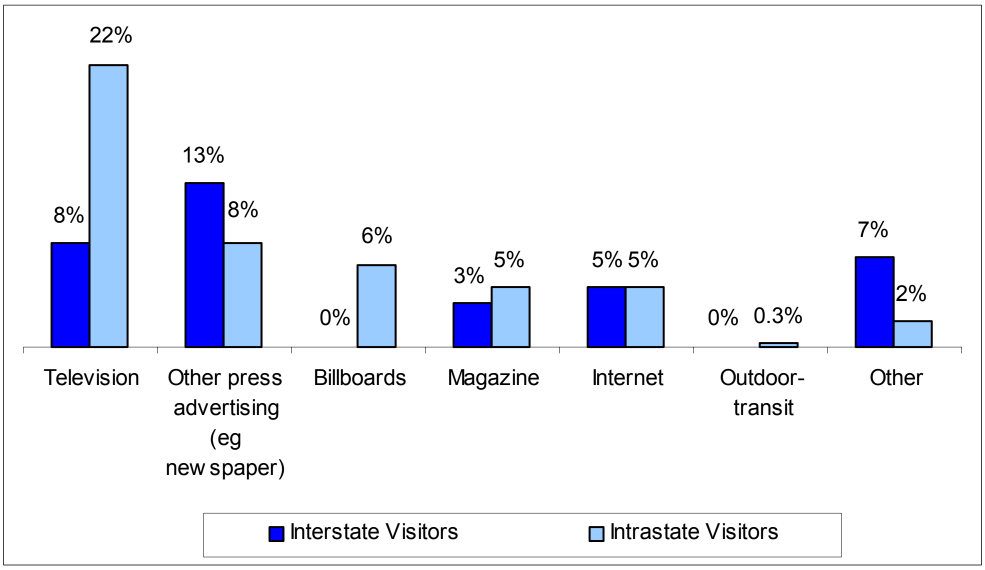
Advertising Recall by Origin



4.2.5 Advertising Medium Recall by Origin

Intrastate visitors were more likely to see advertising on television rather than other press advertising, while the reverse was true for interstate visitors, who were more likely to see advertising in other press advertising.

Advertising Mediums Recalled by Origin

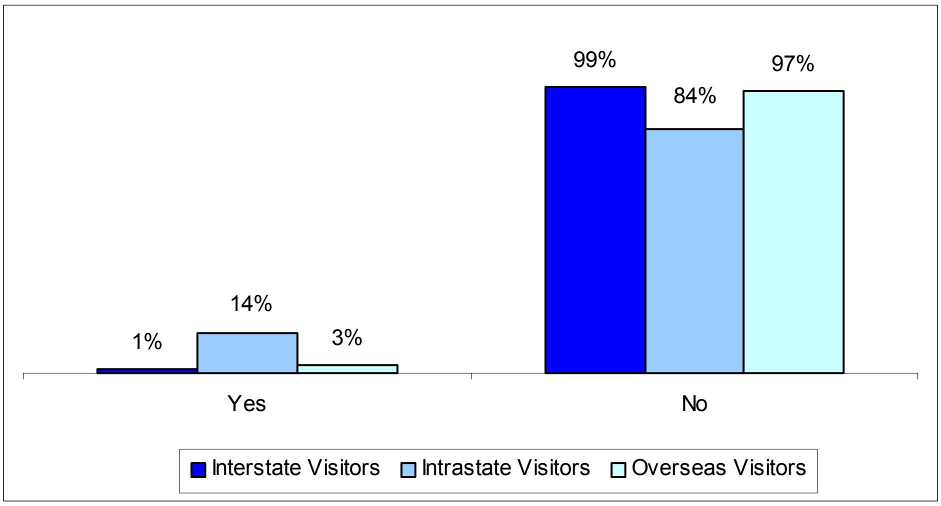


Note: Overseas visitors not included due to small sample size

4.2.6 Slogan "Lazy Days, Play Days, Every Day" Recall by Origin

A small percentage of intrastate visitors recalled the Caloundra slogan "Lazy days play days, every day", while only one interstate and one overseas visitor had heard the slogan.

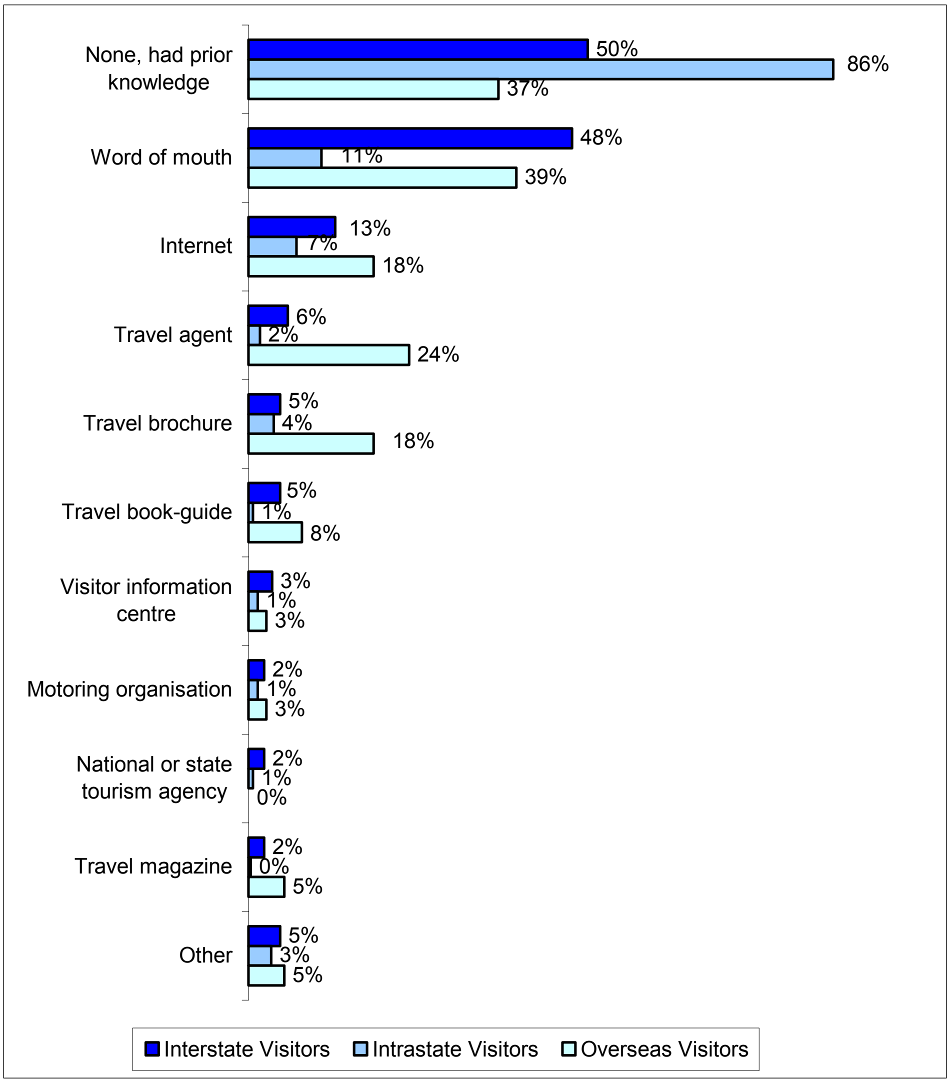
Slogan Recall by Origin



4.2.7 Information Sources by Origin

The majority of intrastate visitors did not use information sources to plan their trip to Caloundra as they already had prior knowledge. Overseas visitors accessed more information sources than interstate and intrastate visitors; particularly travel brochures and travel agents. Interstate visitors used word of mouth more often than intrastate and overseas visitors.

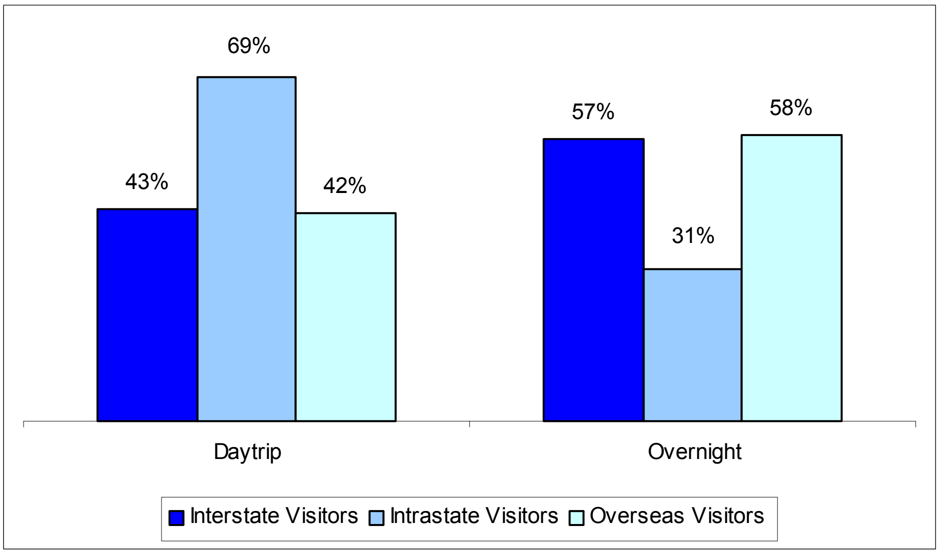
Information Sources by Origin



4.2.8 Daytrip/Overnight Stay by Origin

A higher proportion of intrastate visitors were on a daytrip, whereas a higher proportion of interstate and overseas visitors were on an overnight trip.

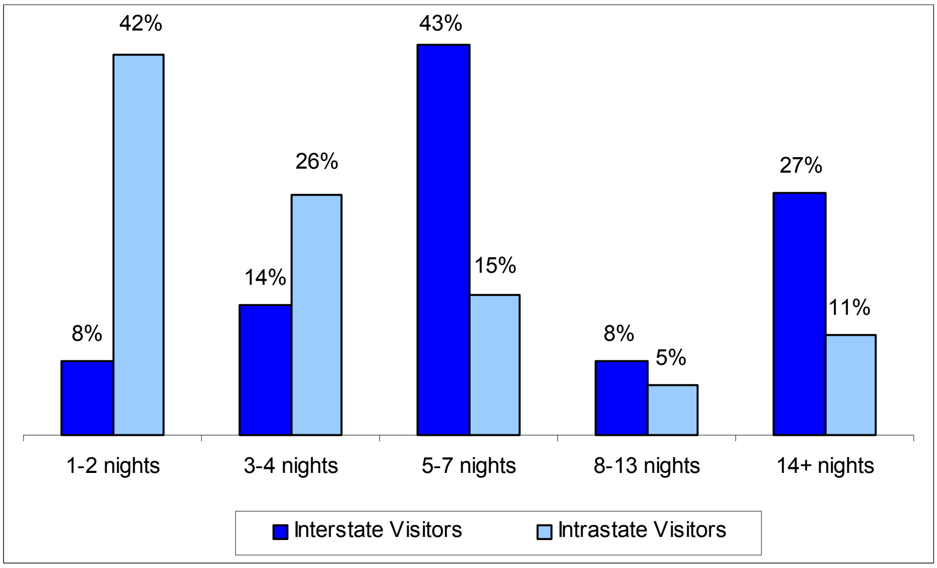
Daytrip/Overnight Stay by Origin



4.2.9 Length of Stay by Origin

The majority of intrastate overnight visitors stayed between one and four nights, whereas the majority of interstate visitors stayed five or more nights.

Length of Stay by Origin

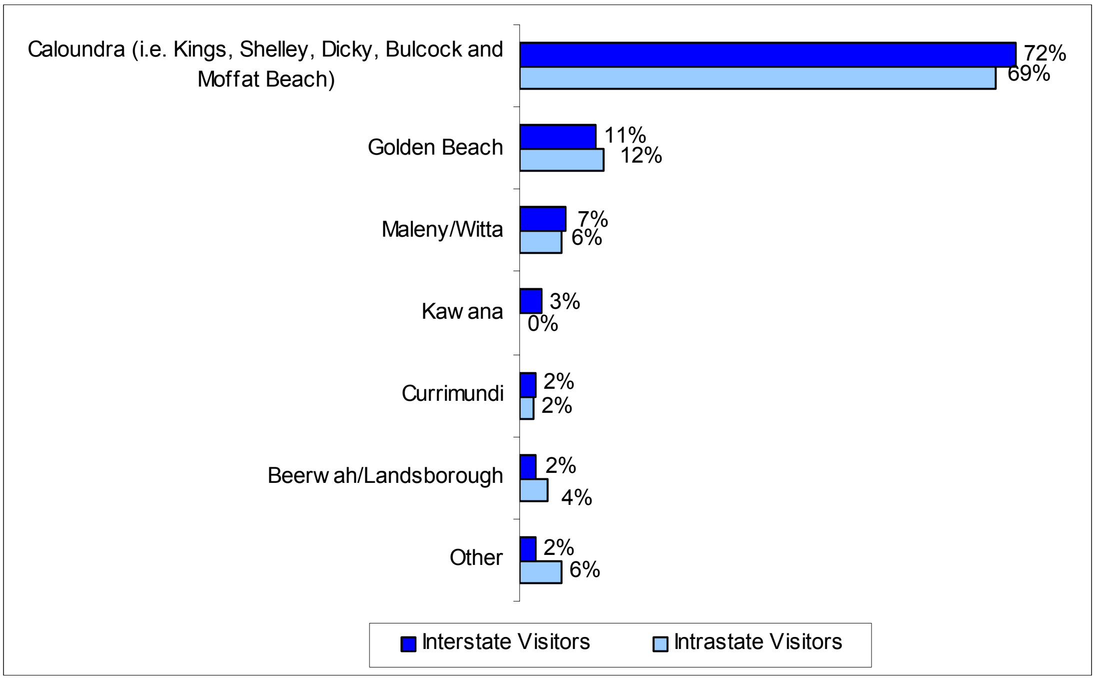


Base: Overnight visitors
Note: Overseas visitors not included due to small sample size

4.2.10 Accommodation Location by Origin

The most common location for accommodation for both interstate and intrastate visitors was Caloundra beaches.

Location of Accommodation by Origin

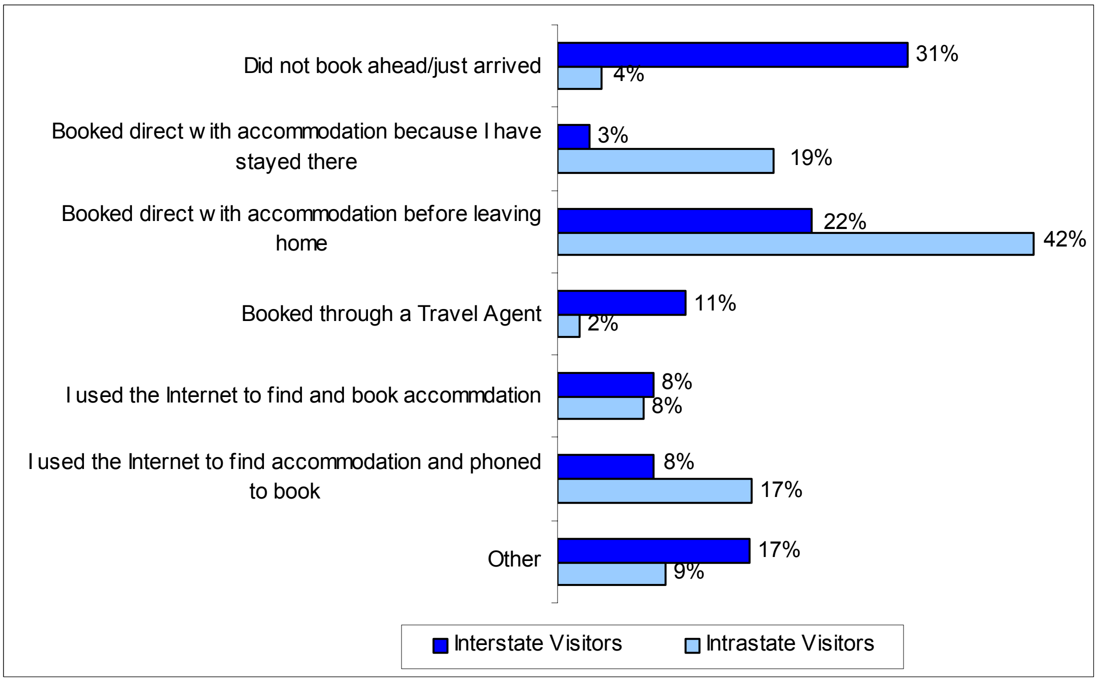


Note: Overseas visitors not included due to small sample size

4.2.11 Accommodation Booking by Origin

Interstate visitors just arrived in Caloundra without booking accommodation in advance more often than intrastate visitors.

Method of Booking Accommodation by Origin

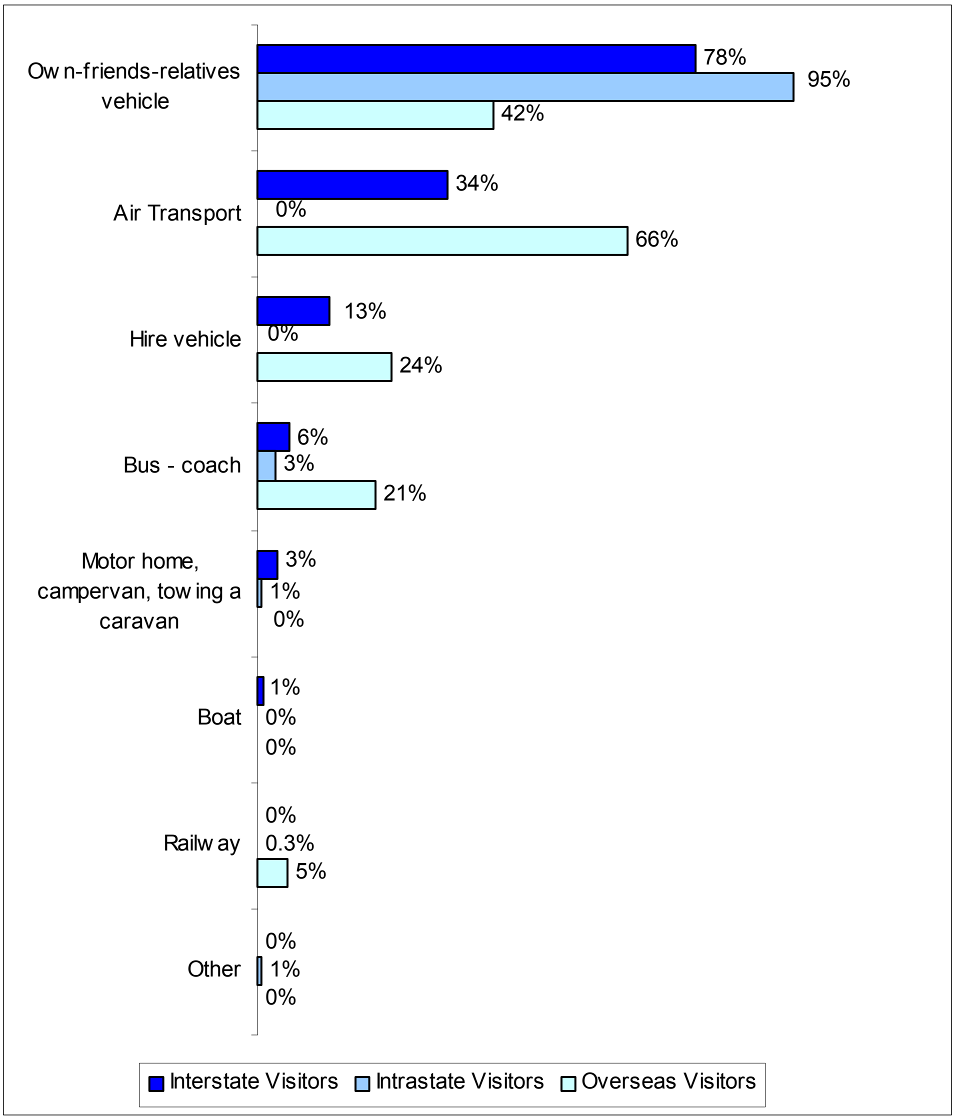


Base: Overnight visitors who stayed in commercial accommodation
'Other' consists of a range of methods of booking accommodation each mentioned by fewer than 3% of respondents

4.2.12 Form of Transportation by Origin

The majority of domestic visitors to Caloundra used their own/friends/relatives vehicle on their journey to Caloundra, while overseas visitors were more likely to use a combination of air transport and hire vehicle. The finding that only two-thirds of overseas visitors indicated using air transport on their journey to Caloundra implies that some respondents mentioned all transport used on their journey, while some respondents only mentioned the transport they used on the last leg of their journey.

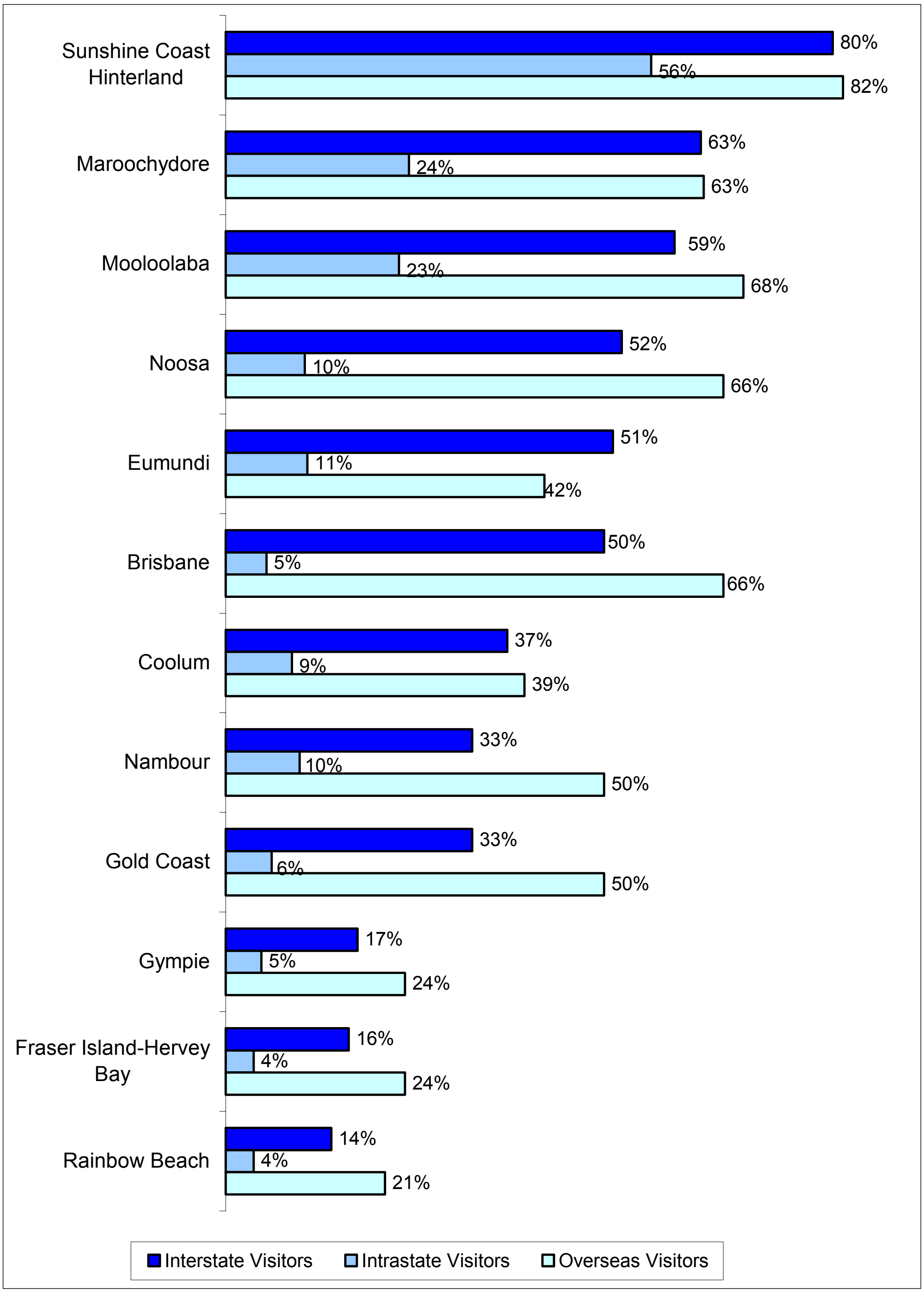
Form of Transport Used by Origin



4.2.13 Places Visited by Origin

Overseas and interstate visitors visited more places around South East Queensland on their trip than intrastate visitors.

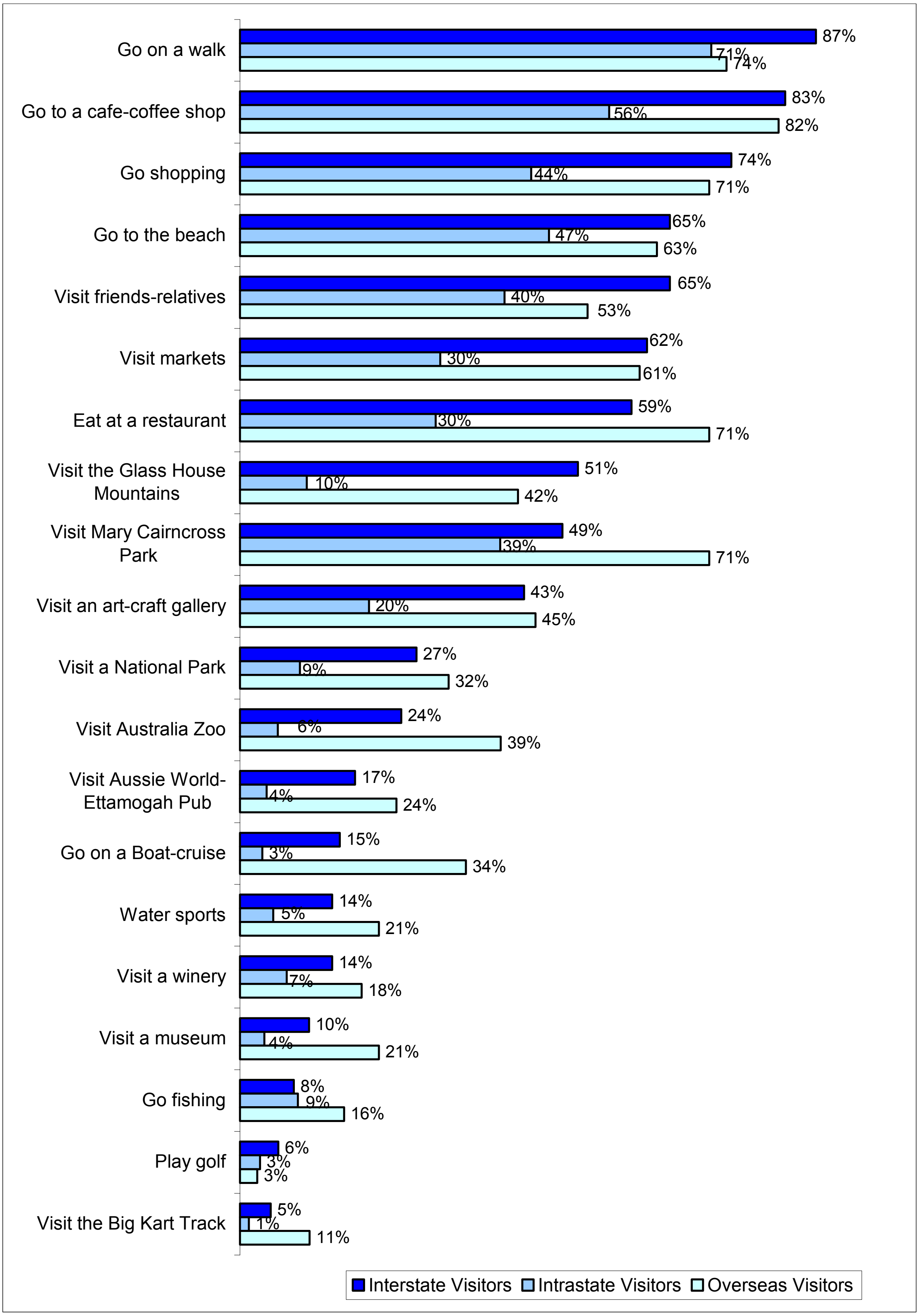
Places Visited During Trip by Origin



4.2.14 Activities by Origin

Interstate and overseas visitors participated in more activities during their stay in Caloundra than intrastate visitors.

Activities by Origin



Activities by Origin

Activities	Interstate Visitor	Intrastate Visitor	Overseas Visitor	Max. Diff*
Go on a walk	87%	71%	74%	16%
Go to a cafe-coffee shop	83%	56%	82%	27%
Go shopping	74%	44%	71%	30%
Go to the beach	65%	47%	63%	18%
Visit friends-relatives	65%	40%	53%	25%
Visit markets	62%	30%	61%	31%
Eat at a restaurant	59%	30%	71%	41%
Visit the Glass House Mountains	51%	10%	42%	41%
Visit Mary Cairncross Park	49%	39%	71%	32%
Visit an art-craft gallery	43%	20%	45%	25%
Visit a National Park	27%	9%	32%	22%
Visit Australia Zoo	24%	6%	39%	34%
Visit Aussie World-Ettamogah Pub	17%	4%	24%	20%
Go on a Boat-cruise	15%	3%	34%	31%
Water sports	14%	5%	21%	16%
Visit a winery	14%	7%	18%	11%
Visit a museum	10%	4%	21%	17%
Go fishing	8%	9%	16%	8%
Play golf	6%	3%	3%	3%
Visit the Big Kart Track	5%	1%	11%	9%

4.3 Opinions and Satisfaction by Origin

4.3.1 Possible Improvements by Origin

A higher proportion of overseas visitors suggested improved public transport as a possible improvement to the Caloundra area, while a higher proportion of interstate visitors suggested improved/more signage. Improved parking and improved traffic flow/roads was an improvement mentioned more often by intrastate visitors.

Possible Improvements by Origin

Improvement	Interstate Visitors	Intrastate Visitors	Overseas Visitors	Max. Diff*
Improved/more signage	12%	3%	8%	8%
Improved/more public facilities/amenities/parks	6%	10%	13%	7%
Improve traffic flow/roads	6%	9%	0%	9%
Improved/more parking	5%	12%	3%	9%
Maintenance/cleanliness of town/public areas	5%	2%	0%	5%
More tourist information	5%	3%	8%	5%
More entertainment/activities/attractions (including extended opening hours)	5%	9%	3%	7%
Restrict development (e.g. no more high-rises)	3%	7%	5%	4%
Improved/more public transport	3%	8%	13%	10%
Improved/more shops (incl. extended opening hours)	2%	5%	3%	3%
Improved/more restaurants/cafes (incl. extended opening hours)	1%	3%	0%	3%
Less crowding/touristy/commercial/not like Gold Coast	1%	3%	3%	2%
Other	8%	15%	11%	7%

**Max. Diff shows the percentage difference between the highest and the lowest percentages across the sub-groups.*

4.3.2 Visitor Satisfaction by Origin

On average, the beaches received the highest satisfaction rating from both interstate and intrastate visitors. Interstate visitors were more satisfied than intrastate visitors with the availability of tourist information, the range of attractions, the value for money of attractions and the car parking facilities. Intrastate visitors were more satisfied than interstate visitors with the quality of accommodation.

Mean Satisfaction with Aspects of Caloundra by Origin

Aspects of Caloundra	Interstate Visitor	Intrastate Visitor	Max. Diff*
Beaches	4.60	4.64	0.03
Accommodation - range	4.58	4.63	0.04
Friendliness of locals	4.51	4.46	0.05
Accommodation - value for money	4.26	4.40	0.13
Accommodation - availability	4.21	4.38	0.17
Lots to see and do	4.51	4.35	0.16
Accommodation - quality	4.12	4.34	0.22
Accommodation - service	n.p.	4.33	n.p.
National Parks	4.32	4.31	0.01
Personal safety-security	4.34	4.30	0.04
Availability of tours	n.p.	4.28	n.p.
Accommodation - overall	4.35	4.27	0.09
Restaurants-Cafes - atmosphere	4.12	4.22	0.10
Restaurants-Cafes - range	4.25	4.22	0.03
Restaurants-Cafes - service	4.19	4.16	0.02
Restaurants-Cafes - quality of food	4.22	4.14	0.08
Attractions - service	4.16	4.13	0.03
Restaurants-Cafes - overall	4.11	4.12	0.02
Availability of tourist information	4.32	4.12	0.20
Attractions - overall	4.19	4.10	0.09
Attractions - quality	4.23	4.09	0.13
Shopping - quality of goods	4.00	4.07	0.07
Shopping - service	3.98	4.05	0.07
Shopping - overall	3.96	4.04	0.08
Access-transport to the region	4.13	3.97	0.16
Restaurants-Cafes - value for money	4.02	3.96	0.06
Attractions - range	4.25	3.96	0.29
Shopping - value for money	3.82	3.94	0.13
Shopping - range	4.00	3.94	0.06
Signage	3.87	3.94	0.07
Caloundra CBD Streetscape	3.94	3.87	0.07
Attractions - value for money	4.13	3.76	0.37
Car park facilities	3.97	3.74	0.23
Nightlife-entertainment	n.p.	3.08	n.p.
Availability of Public Transport	n.p.	2.51	n.p.
Overall satisfaction	**4.43**	**4.39**	**0.05**

Scale: 1= Very Dissatisfied; 5= Very Satisfied
**Max. Diff shows the difference between the highest and the lowest mean scores across the sub-groups.*
= Top 5 for each sub group Differences by Origin
=Bottom 5 for each sub group Differences by Origin
n.p. (Not publishable) due to sub-group sample being under 30 for relevant aspect
Note: Overseas visitors not included due to small sample size

4.3.3 Development of Caloundra by Origin

A higher proportion of interstate and intrastate visitors compared to overseas visitors wanted Caloundra to not develop at all or to be less commercial/overdeveloped/not like Gold Coast.

Development of Caloundra by Origin

Development	Interstate Visitor	Intrastate Visitor	Overseas Visitor	Max. Diff*
No more development/stay same	33%	27%	21%	12%
Restrict/stop high rise development	14%	17%	13%	4%
Less commercial/overdeveloped/not like Gold Coast	19%	25%	11%	14%
Develop slowly	9%	7%	11%	3%
Upgrade/beautify/landscape	1%	3%	3%	2%
Parking/roads/signage	6%	7%	0%	7%
More public/tourist facilities/activities	5%	6%	5%	1%
Maintain/focus on natural/environment features	6%	4%	8%	4%
Other	8%	15%	11%	7%

**Max. Diff shows the percentage difference between the highest and the lowest percentages across the sub-groups.*

5 Differences by Wave

This section presents results for sub groups based on **Wave**. The sub groups included in the Wave results and the sample sizes for each are as follows.

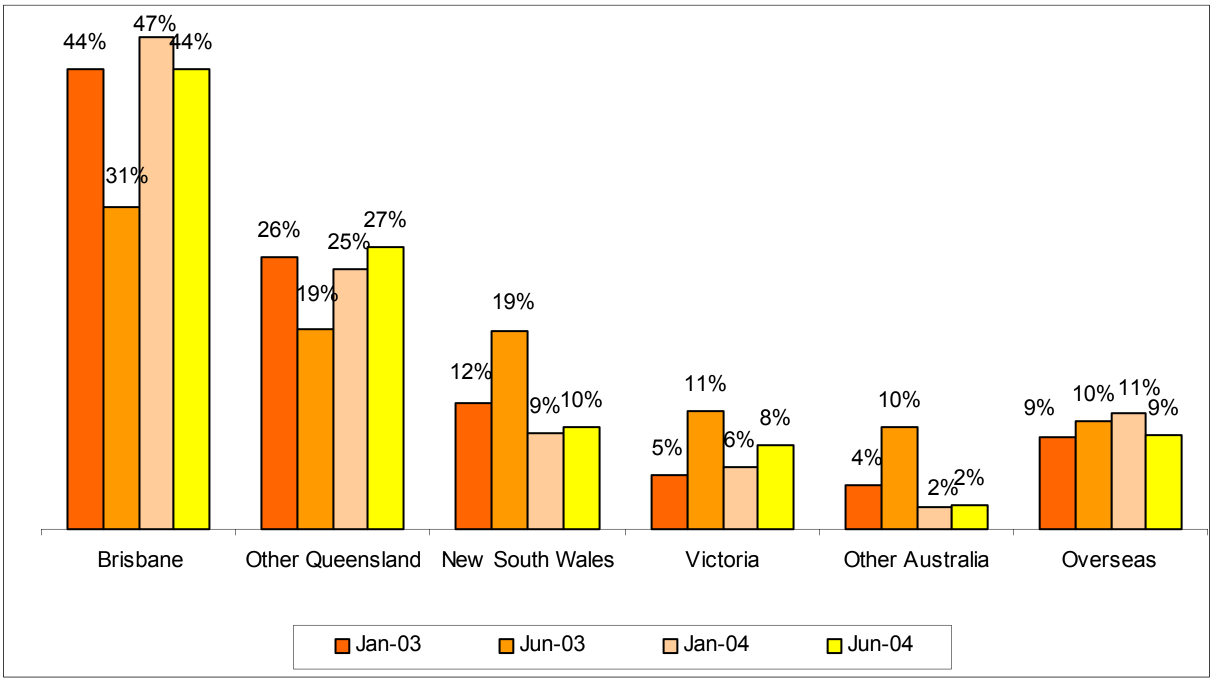
Sub-group	Sample Size
Jan 03 (8 - 21 January 2003)	403
Jun 03 (7 - 25 June 2003)	329
Jan 04 (10 - 26 January 2004)	421
Jun 04 (6 – 23 June 2004)	421
TOTAL	**1574**

5.1 Visitor Details by Wave

5.1.1 Origin by Wave

The origin profile in the June 2004 visitor survey sample was very similar to the January 2004 and January 2003 samples. The June 2003 sample had more interstate visitors than in the other samples.

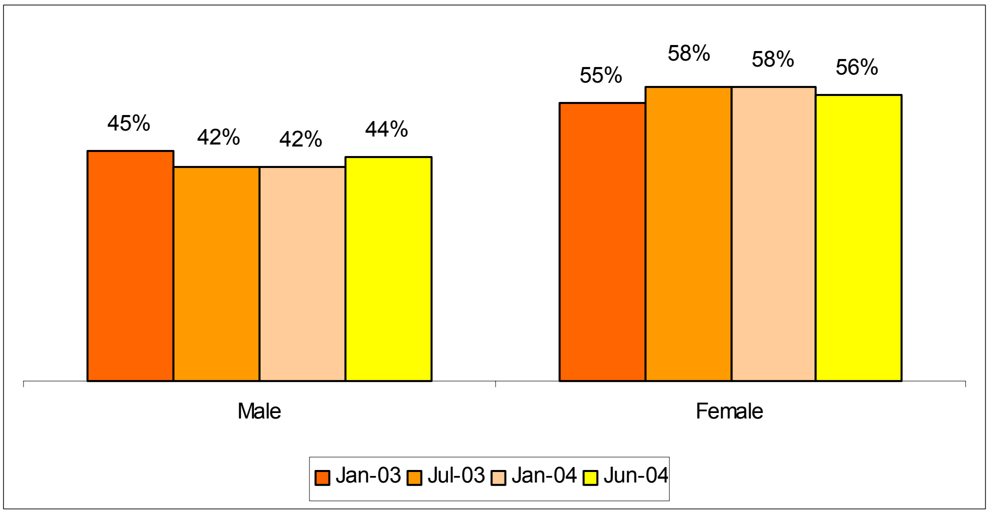
Origin by Wave



5.1.2 Sex by Wave

Each sample is slightly skewed towards females.

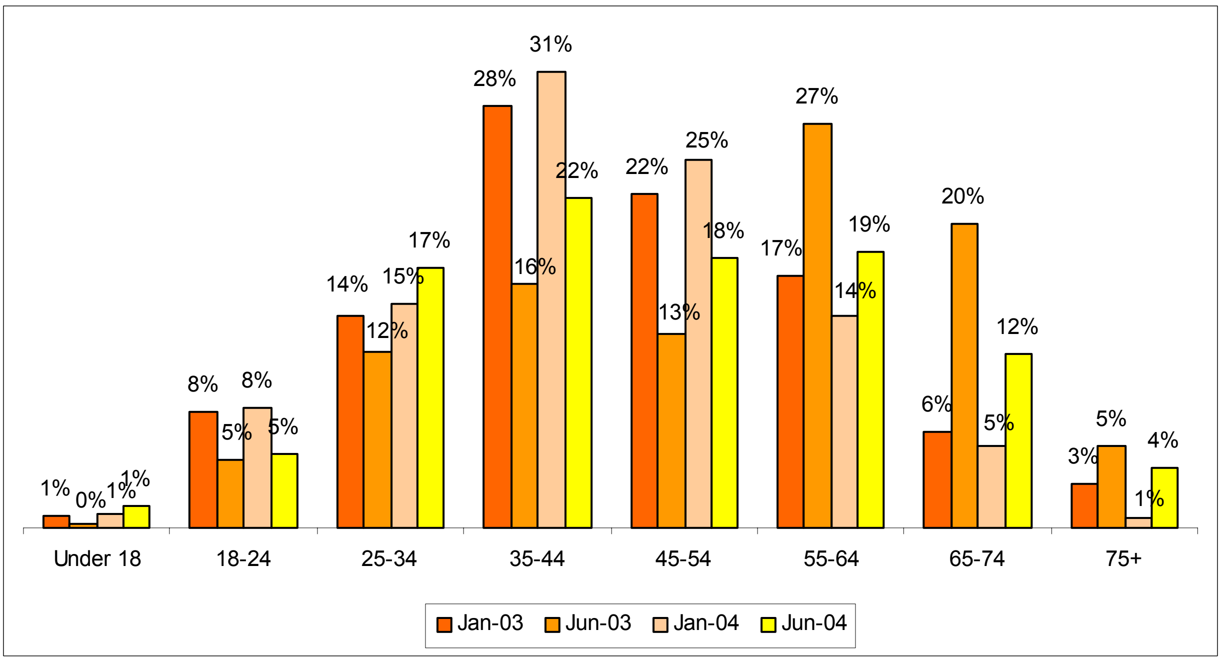
Sex by Wave



5.1.3 Age by Wave

The age profile of visitors to Caloundra is younger in January 2003 and January 2004 than in June 2003 and June 2004. The June 2004 sample was younger than the June 2003 sample.

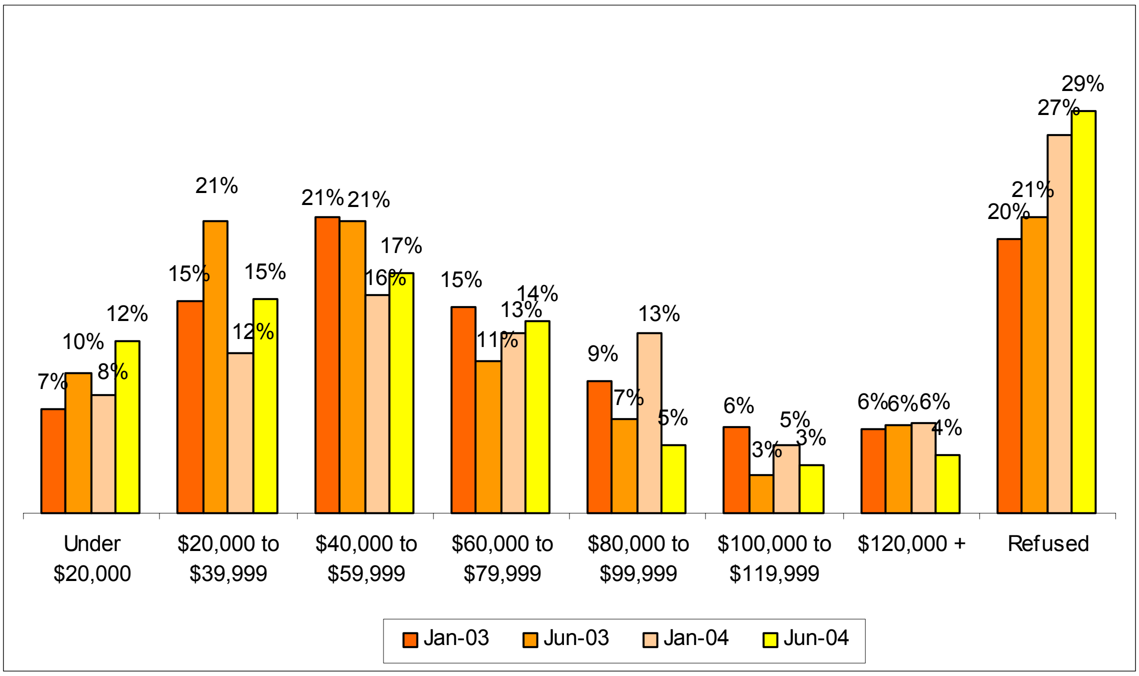
Age Group by Wave



5.1.4 Income by Wave

Visitors in June 2003 and June 2004 have a lower income profile than visitors in January 2003 and January 2004.

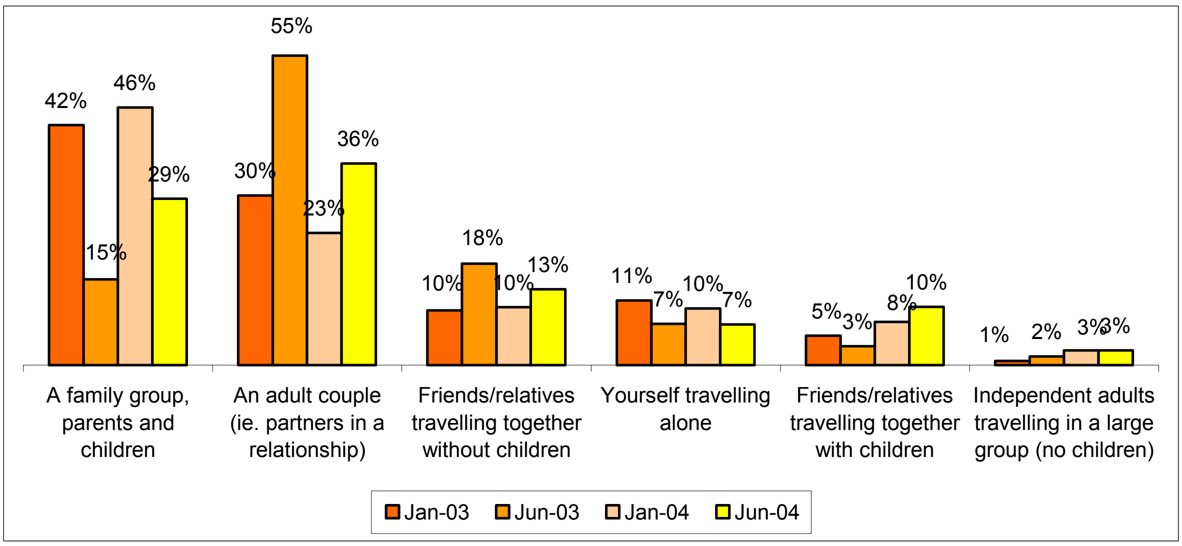
Household Income by Wave



5.1.5 Travel Party by Wave

In June 2003 and June 2004 there was a higher proportion of adult couples, and a much lower proportion of family groups (parents and children), compared with January 2003 and January 2004.

Travel Party by Wave

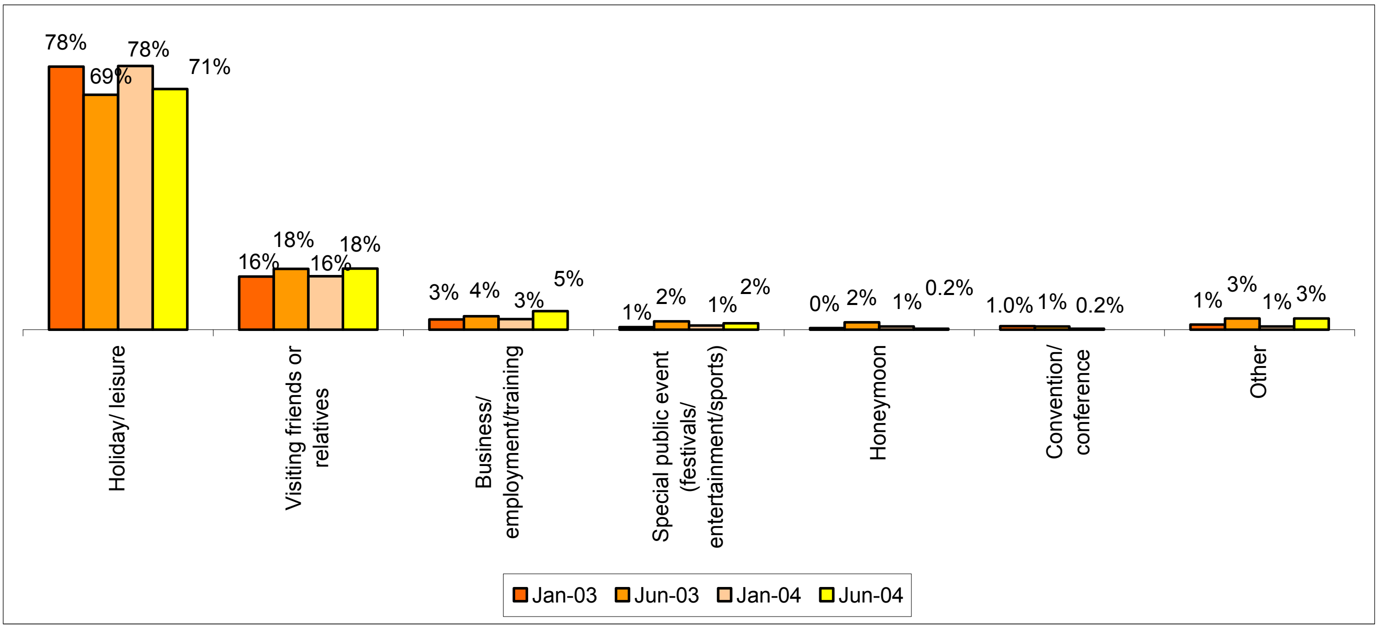


5.2 Details of the Visit by Wave

5.2.1 Main Purpose by Wave

Respondents were asked the main purpose of their trip. A smaller proportion of visitors in June 2003 and June 2004 were on a holiday, compared with January 2003 and January 2004.

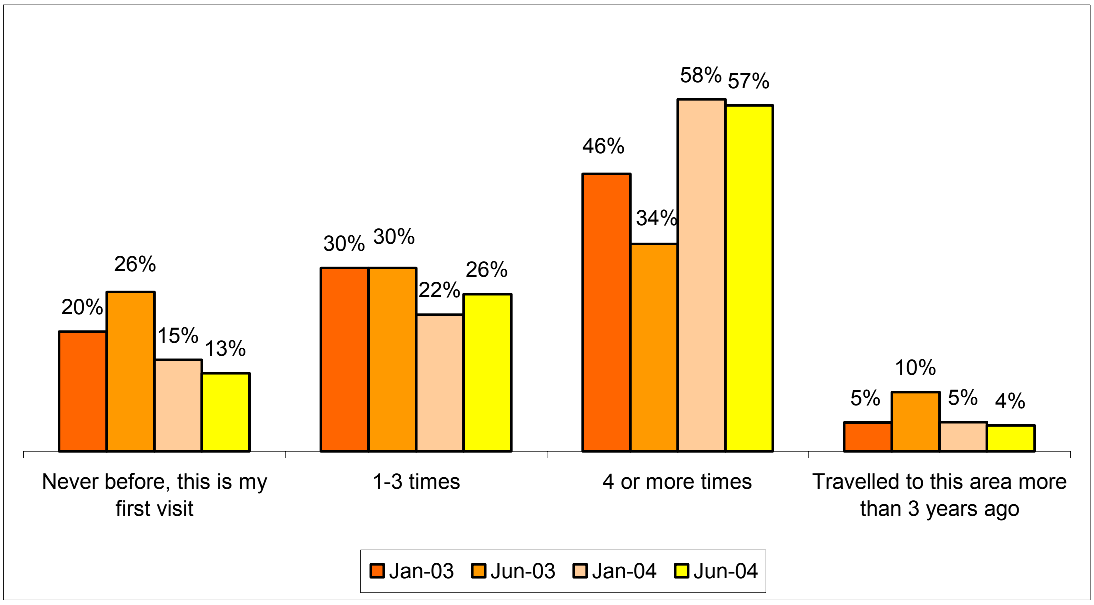
Main Purpose of Trip by Wave



5.2.2 Previous Visitation by Wave

Respondents were more likely to have travelled to Caloundra four or more times in the past three years in January 2004 and June 2004 than in January 2003 and June 2003. Respondents were more likely to be first time visitors in the June 2003 sample than any other samples.

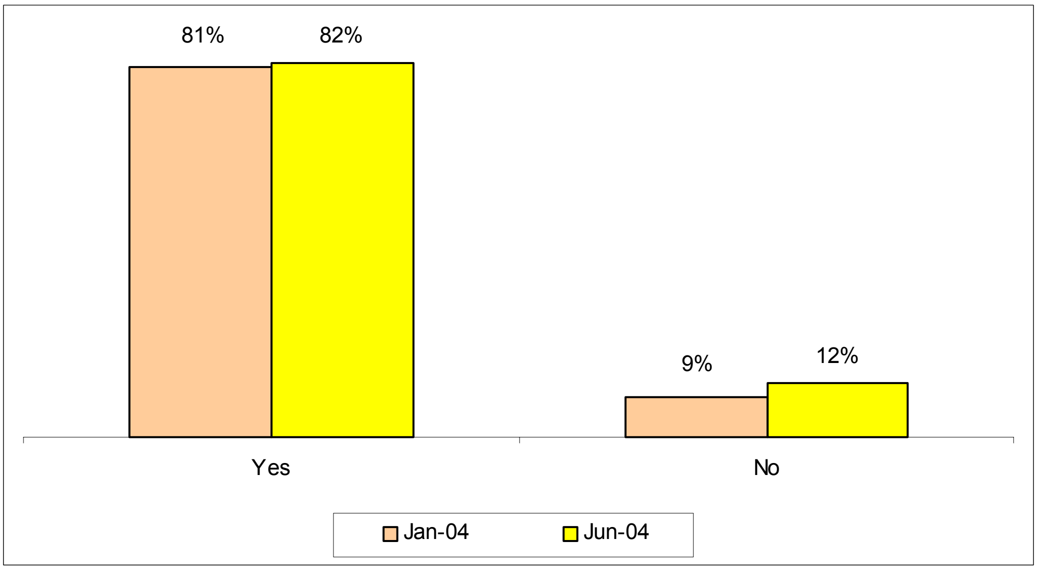
Number of Visits to Caloundra in the Last Three Years by Wave



5.2.3 Plan to Return to Caloundra by Wave

Respondents in the January 2004 and June 2004 samples were equally likely to indicate that they would return to Caloundra for a holiday in the next three years.

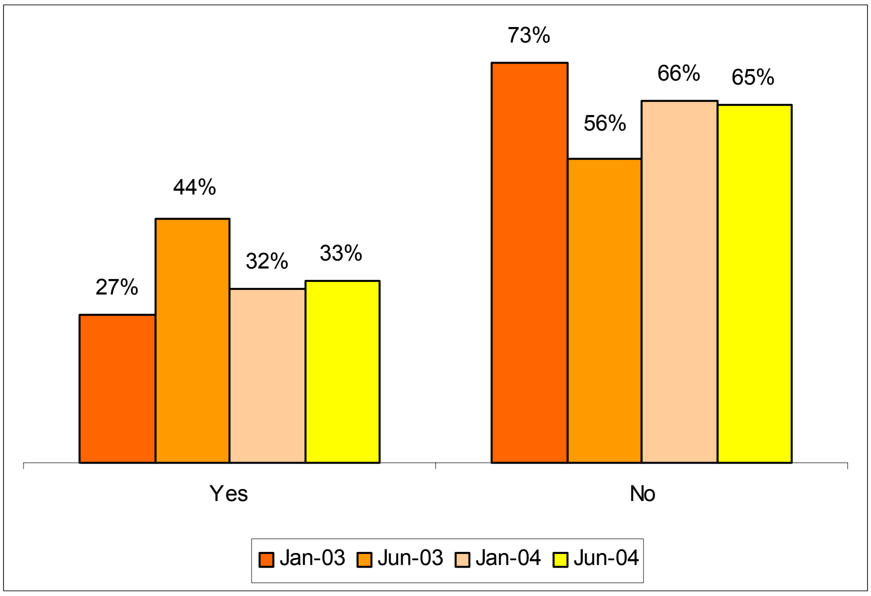
Plan to Return to Caloundra by Wave (Jan-04 and Jun-04 only)



5.2.4 Advertising Recall by Wave

A higher proportion of visitors in June 2003 recalled seeing advertising for the Caloundra region before leaving home. Advertising recall levels were relatively equal in January 2004 and June 2004.

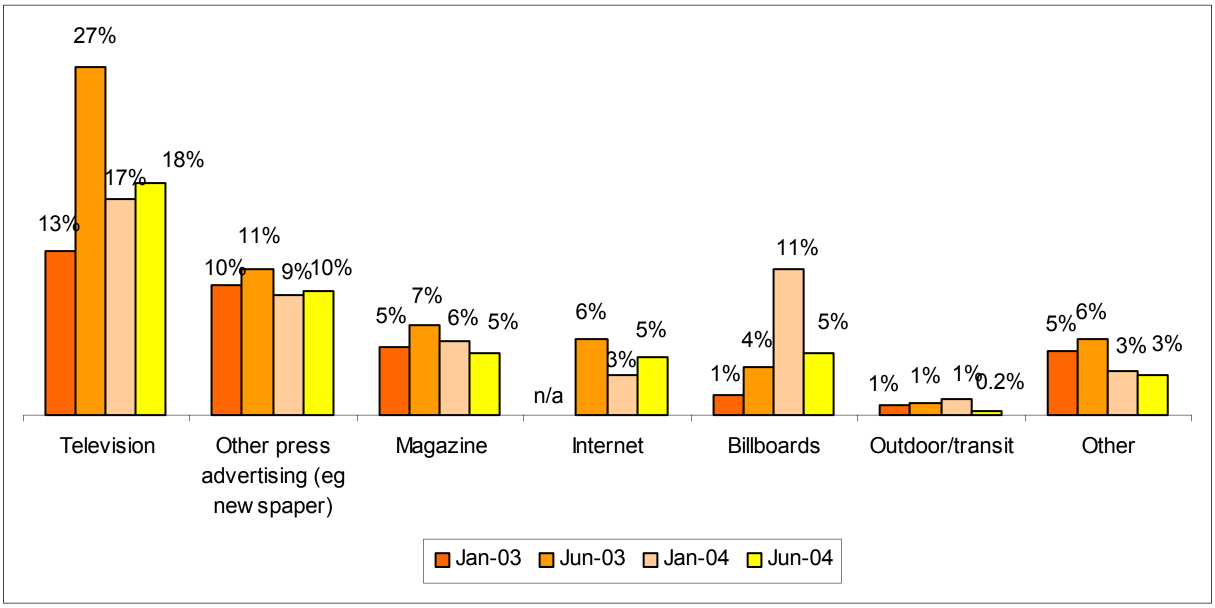
Advertising Recall by Wave



5.2.5 Advertising Medium Recalled by Wave

In June 2003, a higher proportion of respondents recalled seeing advertising for the Caloundra region on television, compared with January 2003, January 2004 and June 2004. A higher proportion of visitors in January 2004 recalled seeing advertising on billboards compared with January 2003, June 2003 and June 2004.

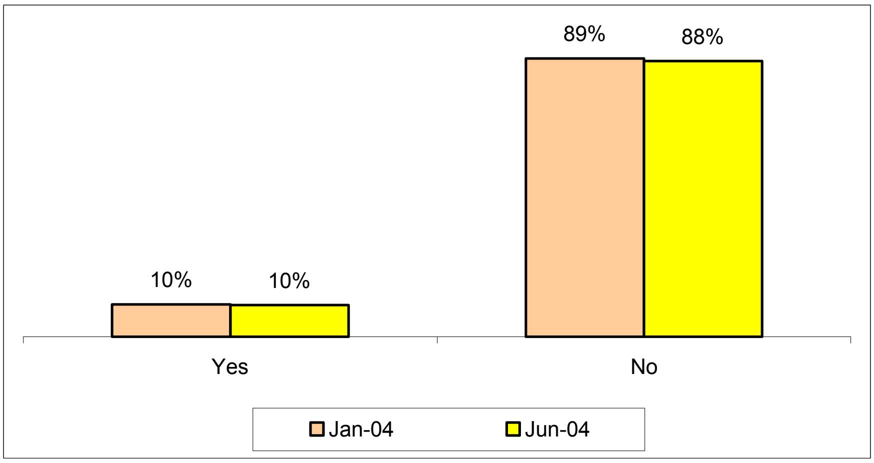
Advertising Mediums Recalled by Wave



5.2.6 Slogan "Lazy Days, Play Days, Every Day" Recall by Wave

An equal proportion of respondents recalled the slogan Lazy days, play days, every day in January 2004 and June 2004.

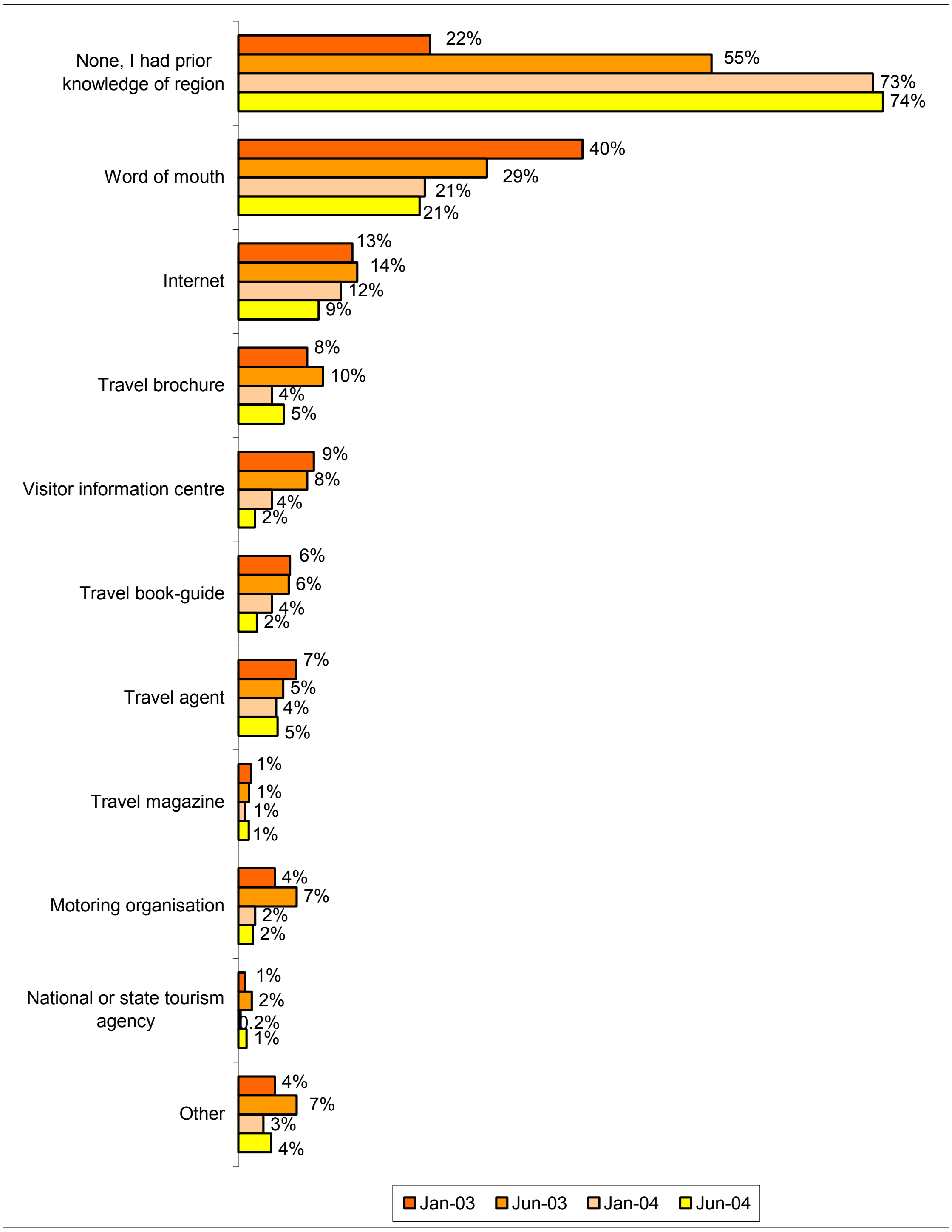
Slogan Recall by Wave



5.2.7 Information Sources by Wave

More visitors had prior knowledge of the region in January 2004 and in June 2004 than in June 2003. More people used word of mouth as an information source in June 2003 than in January 2003 and June 2004.

Information Sources by Wave

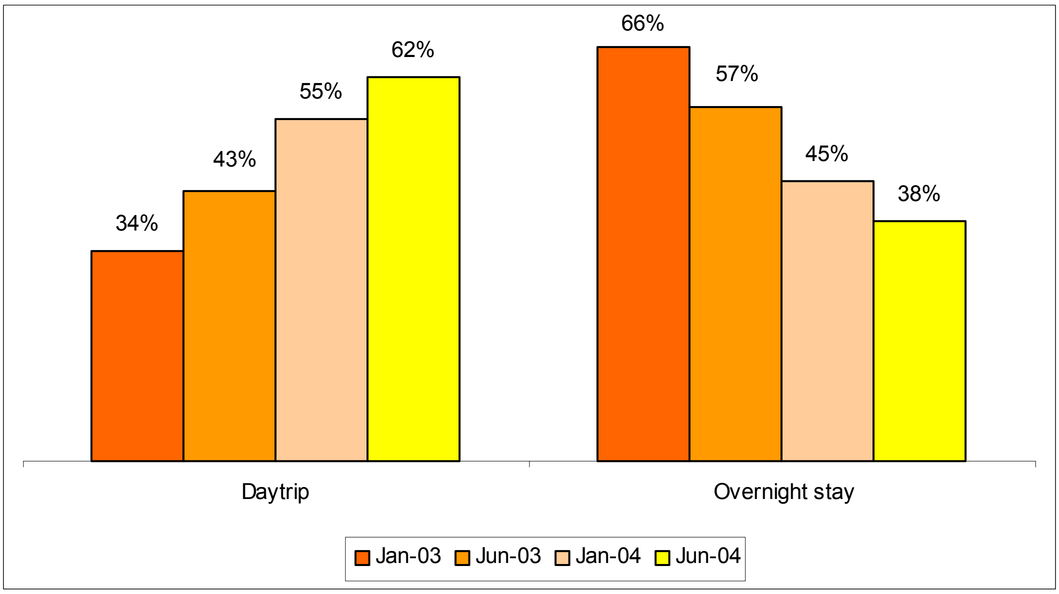


"None, had prior knowledge" was not on the pre-coded list for this question in the January 2003 survey

5.2.8 Daytrip/Overnight Stay by Wave

Since January 2003 visitors have been more and more likely to be on a daytrip to Caloundra than be staying overnight.

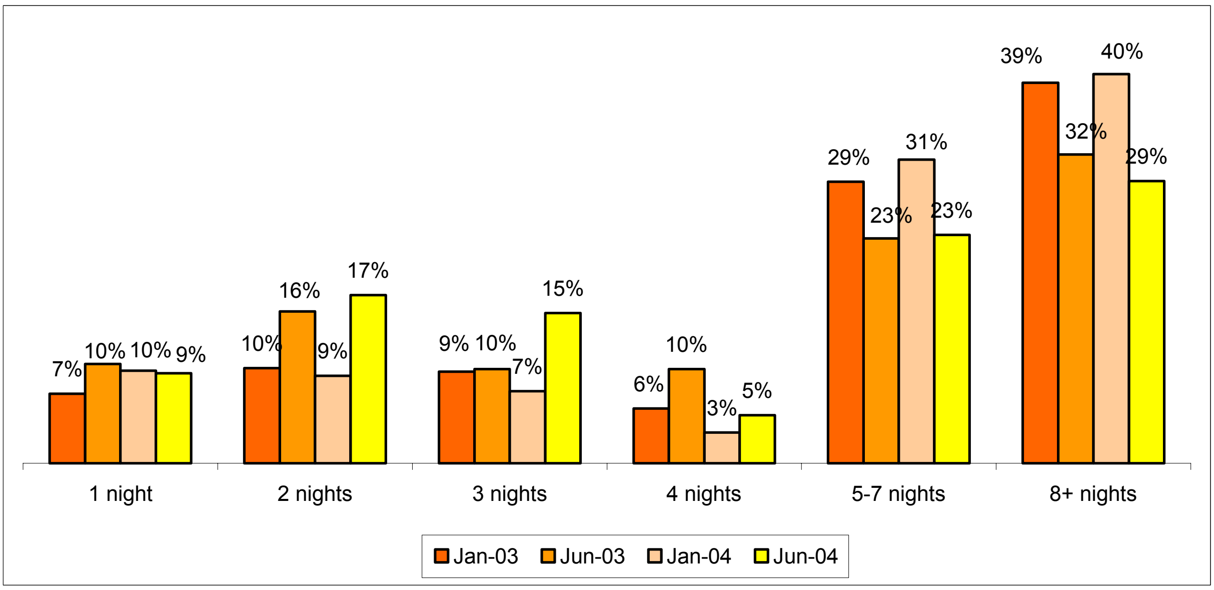
Daytrip/Overnight Stay by Wave



5.2.9 Length of Stay by Wave

Visitors in January 2003 and January 2004 have a longer length of stay than visitors in June 2003 and June 2004.

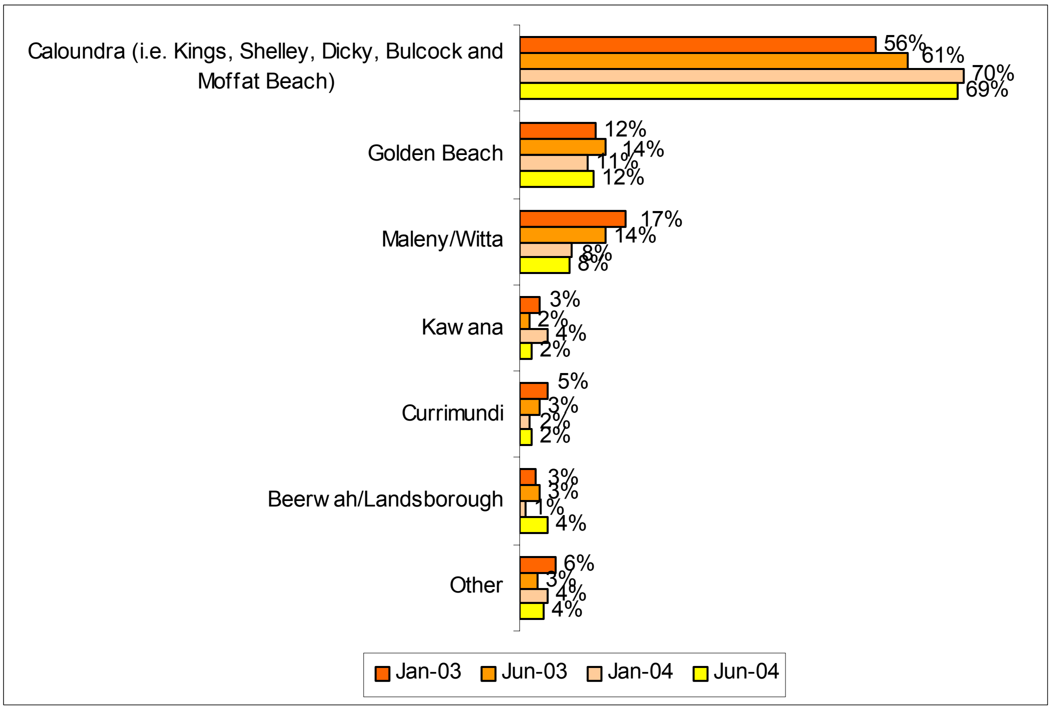
Length of Stay by Wave



5.2.10 Accommodation Location by Wave

A higher proportion of visitors in January 2004 and June 2004 stayed in Caloundra beaches compared with January 2003 and June 2003, while a smaller proportion stayed in Maleny or Witta in comparison with January and June 2003.

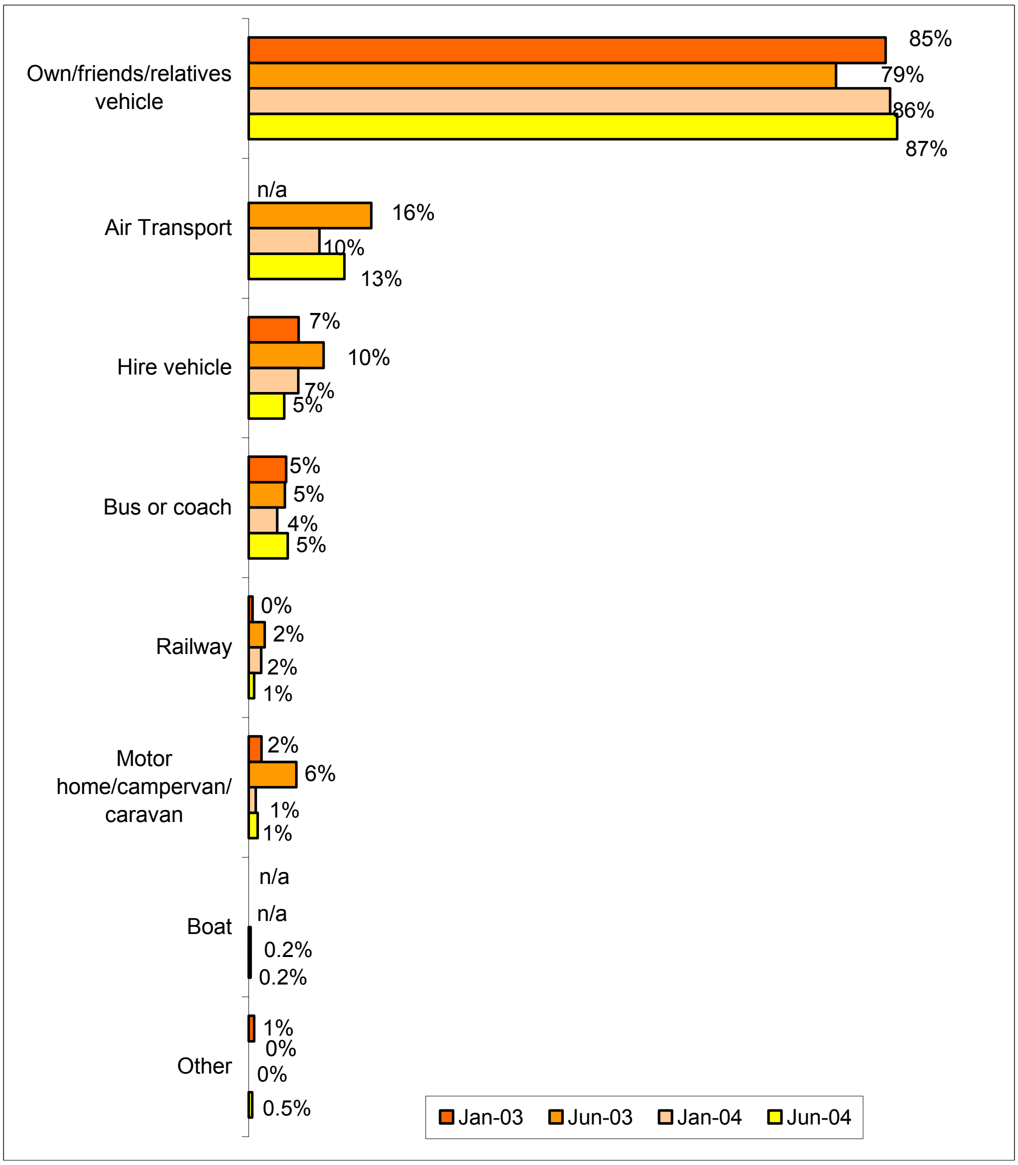
Location of Main Accommodation by Wave



5.2.11 Form of Transportation by Wave

A larger proportion of visitors travelled by air in June 2003 and June 2004 compared with January 2004. June 2003 had the highest proportion of visitors using a motor home/campervan/caravan.

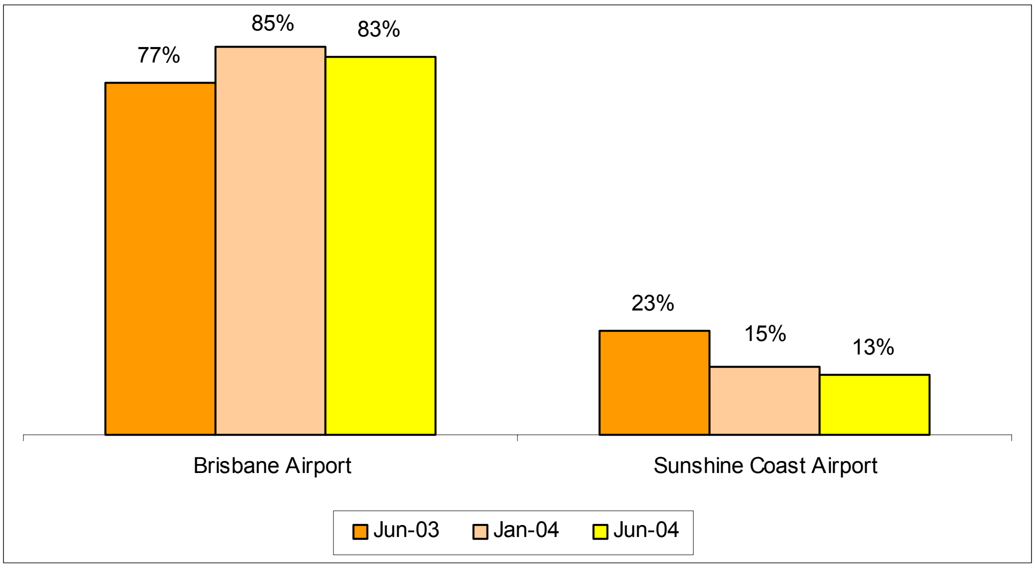
Form of Transport Used by Wave



Multiple responses accepted in June 2003, January 2004, and June 2004
Only single response accepted in January 2003
'n/a': not prompted in survey

A slightly larger proportion of visitors in June 2003 flew into the Sunshine Coast Airport compared to January 2004 and June 2004.

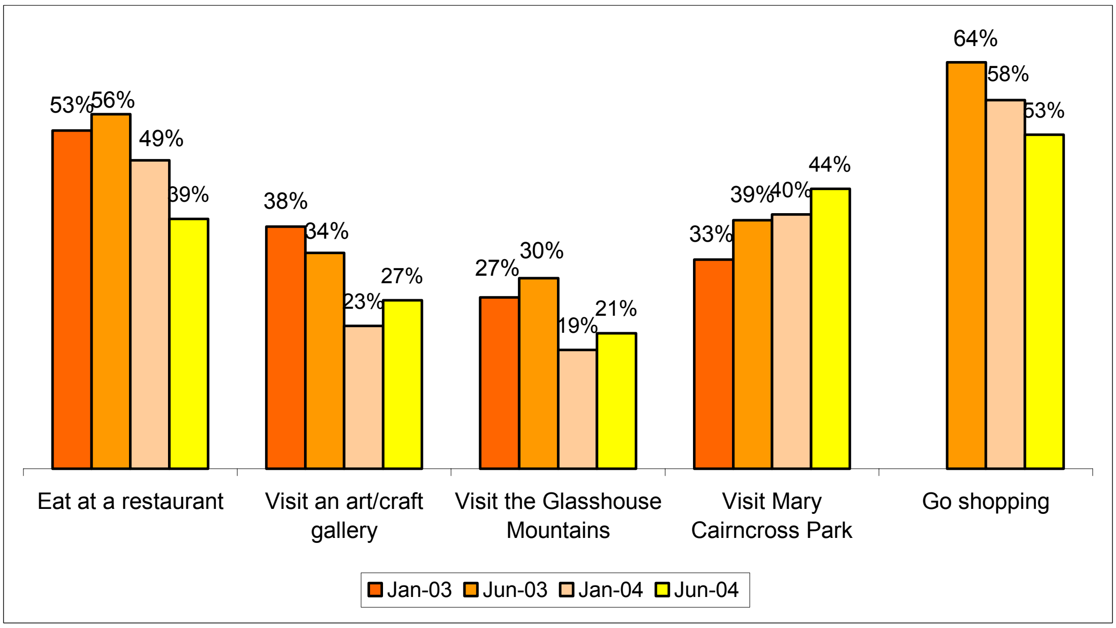
Airport Arrival by Wave (not including Jan-03)



5.2.12 Activities by Wave

More visitors participated in the activities eating at a restaurant, visiting art/craft galleries and visiting the Glass House Mountains in the 2003 waves compared to the 2004 waves. The proportions of visitors going shopping has also shown a decrease since the Jun-2003 wave. More people visited Mary Cairncross Park in the June 2004 wave than any other waves. However it should be noted that more interviews were conducted in Mary Cairncross Park than in any other locations in June 2003 and more than in any of the previous waves.

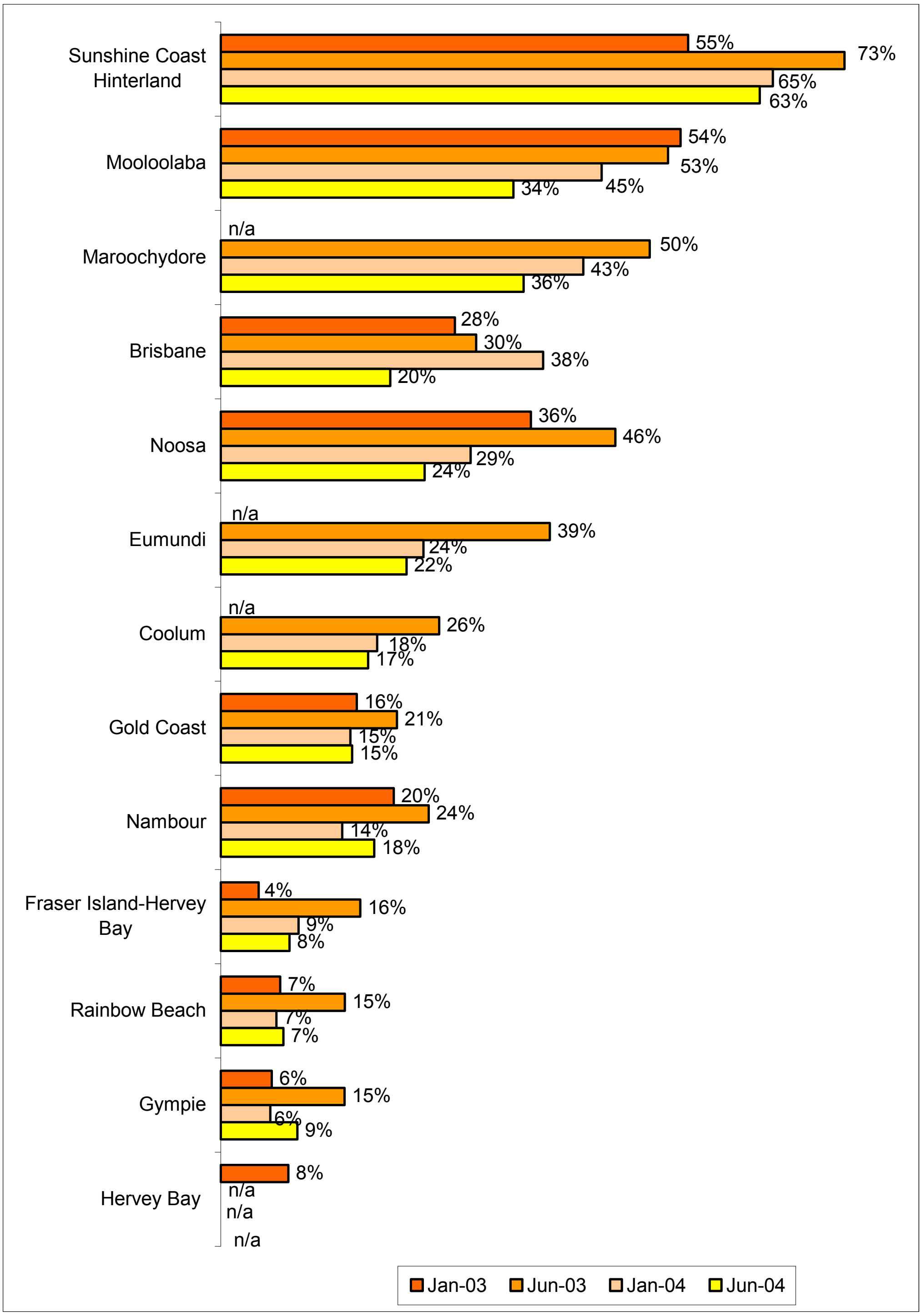
Activities – Notable Differences Between Waves



5.2.13 Places Visited by Wave

In June 2003, a higher proportion of respondents planned to visit Noosa, the Sunshine Coast Hinterland Fraser Island/Hervey-Bay, Rainbow Beach and Gympie compared with respondents in January 2003, January 2004 and June 2004. Respondents in June 2004 were less likely to visit or plan to visit Mooloolaba, Maroochydore, Brisbane and Noosa than in previous samples.

Places Visited During Trip by Wave



'n/a': Destination not prompted
Multiple responses accepted
Fraser Island and Hervey Bay were separate places in Jan-03 survey, but combined in June-03, Jan-04 and Jun 04 surveys.

5.3 Opinions and Satisfaction by Wave

5.3.1 Possible Improvements by Wave

Improved/more public transport was mentioned more often in the June 2004 sample, than in the previous three waves. Restricting development (e.g. no more high-rises) was not mentioned as frequently in the June 2004 sample as it was in the previous three samples.

Possible Improvements by Wave

Improvement	Jan-03	Jun-03	Jan-04	Jun-04	Max. Diff*
None/nothing		3%	19%		16%
Improved/more parking	8%	4%	10%	10%	6%
Restrict development (e.g. no more high-rises)	14%	10%	9%	6%	8%
Improved/more public facilities/ amenities	10%	8%	9%	9%	2%
Improve traffic flow/roads	3%	5%	8%	7%	5%
Less crowding/touristy/commercial		4%	5%	3%	2%
More shade/sheltered areas			4%		-
Improved/more restaurants and cafes (extended opening hours)	6%		4%	3%	3%
Improved/more signage	3%	6%	4%	5%	3%
Maintenance/cleanliness of town and public areas	3%	4%	3%	2.4%	2%
Improved/more public transport	2%	3%	3%	8%	6%
More tourist information	3%	3%		4%	1%
More/ improved shops	3%			4%	1%
More entertainment /activities/attractions (including extended opening hours)				8%	-
Other		8%	17%	13%	9%

**Max. Diff shows the percentage difference between the highest and the lowest percentages across the sub-groups.*

5.3.2 Visitor Satisfaction by Wave

There was a decrease in satisfaction for many aspects of Caloundra in January 2004 from satisfaction levels in January 2003 and June 2003. However satisfaction levels in June 2004 have increased again to levels similar to January 2003 and June 2003 levels. One anomaly to this general trend is satisfaction with availability of public transport in the region, which has shown a steady decline since 2003.

Mean Satisfaction with Aspects of Caloundra by Wave

Aspects of Caloundra	Jan-03	Jun-03	Jan-04	Jun-04	Max Diff*
Friendliness of locals	4.55	4.57	4.30	4.48	0.27
Weather during your visit	4.49	n/a	4.01	n/a	0.48
Cleanliness of Beaches	4.43	n/a	4.39	n/a	0.03
Quality of Beaches	4.42	n/a	4.47	n/a	0.05
Lots to see and do	4.41	4.42	4.05	4.37	0.37
Beaches Overall	4.41	4.48	4.41	4.64	0.23
Personal safety/security	4.34	4.48	4.23	4.31	0.25
Accommodation - range	4.34	n/a	4.23	4.59	0.36
National Parks	4.34	n/a	4.13	4.31	0.20
Availability of tourist information	4.29	4.35	3.95	4.16	0.40
Access/transport to the region	4.27	4.22	3.86	4.00	0.41
Locals' knowledge about Caloundra	4.22	4.19	3.92	n/a	0.30
Beach Facilities	4.19	n/a	4.01	n/a	0.18
Attractions - range	4.17	n/a	3.91	4.01	0.27
Accommodation - quality	4.17	n/a	4.06	4.30	0.24
Accommodation - overall	4.16	4.21	4.05	4.35	0.31
Availability of tours	4.16	4.37	3.92	4.25	0.44
Restaurants/Cafes - range	4.15	n/a	4.01	4.21	0.20
Accommodation - service	4.14	n/a	4.02	4.33	0.32
Attractions - overall	4.11	4.28	3.86	4.11	0.42
Attractions - service	4.11	n/a	3.82	4.11	0.29
Shopping - range	4.11	n/a	3.77	3.94	0.34
Shopping - service	4.09	n/a	3.90	4.02	0.19
Restaurants/Cafes - atmosphere	4.09	n/a	3.98	4.20	0.22
Attractions - quality	4.07	n/a	3.80	4.09	0.29
Restaurants/Cafes - overall	4.06	4.20	3.95	4.12	0.25
Shopping - overall	4.06	4.00	3.87	4.00	0.19
Accommodation - availability	4.03	n/a	3.79	4.36	0.57
Accommodation - value for money	4.03	n/a	4.02	4.39	0.36
Restaurants/Cafes - service	4.02	n/a	3.90	4.16	0.27
Caloundra CBD Streetscape	4.02	n/a	3.62	3.87	0.39
Shopping - quality of goods	4.01	n/a	3.82	4.03	0.20
Restaurants/Cafes - quality of food	4.00	n/a	3.94	4.15	0.20
Signage	3.99	3.98	3.76	3.92	0.22
Restaurants/Cafes - value for money	3.99	n/a	3.86	3.98	0.13
Shopping - value for money	3.94	n/a	3.75	3.90	0.19
Attractions - value for money	3.90	n/a	3.67	3.83	0.23
Car park facilities	3.84	3.95	3.57	3.84	0.38
Current level of development	3.71	n/a	3.61	n/a	0.10
Nightlife/entertainment	3.55	3.35	3.15	3.24	0.40
Availability of Public Transport	3.54	3.78	3.30	2.76	0.40
Overall Satisfaction	**4.39**	**4.50**	**4.22**	**4.40**	**0.28**

*Scale: 1= Very Dissatisfied; 5= Very Satisfied *Max. Diff shows the difference between the highest and the lowest mean scores across the sub-groups.* *= Top 5 for each sub group* = *Bottom 5 for each subgroup*

5.3.3 Development by Wave

A smaller percentage of people in the June 2004 sample wanted more public/tourist facilities/activities compared to the January 2004 sample.

Development by Wave

Development	Jan-04	Jun-04	Max. Diff*
No more development/stay same	22%	28%	6%
Restrict/stop high rise development	19%	16%	3%
Less commercial/ overdeveloped/not like Gold Coast/Maroochydore/Mooloolaba	17%	22%	5%
More public/tourist facilities/activities	12%	6%	6%
Develop slowly	9%	8%	1%
Parking/roads/signage	7%	6%	1%
Upgrade/beautify/landscape	4%	3%	1%
Family orientation/facilities	3%	n/a	n/a
Maintain/focus on natural/environment features	n/a	5%	n/a
Other	19%	14%	5%

**Max. Diff shows the percentage difference between the highest and the lowest percentages across the sub-groups.*

6 Key Findings - Overall

This section provides a short summary of the key findings from the research.

6.1 Visitor Details

Almost three quarters of the respondents are from intrastate (71%), with 43% from Brisbane, 20% from other areas of the Sunshine Coast and 8% from other Queensland regions. One in ten respondents are from New South Wales and Victoria each (10% and 8% respectively), while the overseas market represents 9% of respondents. The January and June 2004 samples had more visitors from Brisbane than in the January and June 2003 samples.

A larger proportion of females were interviewed (56%). A higher proportion of interstate and intrastate visitors were females, while a higher proportion of overseas visitors were males. There is a range of ages represented within the sample group; however, three-quarters of respondents are aged between 25 and 64 years (76%). The majority of interstate travellers were aged 45 years and over, while the majority of intrastate travellers were aged 25-64. The age profile of visitors to Caloundra is younger in January 2003 and January 2004 than in June 2003 and June 2004.

One in four respondents have an annual household income less than $39,999 (27%). Overseas visitors were more common in the $80,000 + age bracket than interstate and intrastate visitors. Visitors in June 2003 and June 2004 have a lower income profile than visitors in January 2003 and January 2004.

One third of respondents travelled as an adult couple on their visit to Caloundra (36%), with 39% of respondents travelling with children. The most common travel party for interstate and overseas visitors was an adult couple, whereas a family group was the most common travel party for intrastate visitors. In June 2003 and June 2004 there was a higher proportion of adult couples, and a much lower proportion of family groups (parents and children), compared with January 2003 and January 2004.

6.2 Details of the Visit

Main Purpose
Most respondents were visiting for holiday/leisure purposes (71%). A small proportion of respondents travelled to Caloundra to visit friends or relatives (18%).

Previous Visitation
Most respondents had visited the region before, with more than three quarters having visited Caloundra at least one other time in the previous three years (83%). Interstate and overseas visitors were more likely than intrastate visitors to be visiting Caloundra for the first time.

Plan to Return to Caloundra
The majority of respondents (82%) indicated that they planned to return to the Caloundra region for a holiday in the next three years.

Advertising Recall
One third of respondents recalled seeing some form of advertising relating to the Caloundra region (33%). One third of intrastate visitors had seen advertising for Caloundra, while only one in five overseas visitors had seen advertising. One in five respondents saw advertising for the Caloundra region on television (18%), while one in ten respondents saw other press advertising (e.g. newspaper) (10%). Intrastate visitors were more likely to see advertising on television rather than other press advertising, while the reverse was true for interstate visitors, who were more likely to see advertising in other press advertising. Only one in ten respondents had heard the Caloundra slogan “Lazy days, play days, every day”(10%). A small percentage of intrastate visitors recalled the Caloundra slogan (14%), while only one interstate and one overseas visitor had heard the slogan.

Information Sources
Three-quarters of respondents did not source information as they had prior knowledge of the area (74%). Some common sources of information that people did utilise were word of mouth (21%), and the Internet (9%). The majority of intrastate visitors did not use information sources to plan their trip to Caloundra as they already had prior knowledge. Overseas visitors accessed more information sources than interstate and intrastate visitors; particularly travel brochures and travel agents. Interstate visitors used word of mouth more often than intrastate and overseas visitors.

Length of Stay
Most respondents were on a daytrip in the Caloundra region (62%). Half of overnight visitors were staying for five or more nights (52%), with a large proportion of respondents staying for two weeks or more (23%). One in four overnight visitors were staying for one or two nights (26%). A higher proportion of intrastate visitors were on a daytrip, whereas a higher proportion of interstate and overseas visitors were on an overnight trip. The majority of intrastate overnight visitors stayed between one and four nights, whereas the majority of interstate visitors stayed five or more nights. Since January 2003 visitors have been more and more likely to be on a daytrip to Caloundra than be staying overnight. Visitors in January 2003 and January 2004 have a longer length of stay than visitors in June 2003 and June 2004.

Accommodation
Most overnight visitors were staying at Caloundra Beaches (69%). Twelve percent (12%) of overnight visitors stayed in Golden Beach, while 8% of overnight visitors stayed in Maleny/Witta. A higher proportion of visitors in January 2004 and June 2004 stayed in Caloundra beaches compared with January 2003 and June 2003, while a smaller proportion stayed in Maleny or Witta in comparison with January and June 2003.

The majority of overnight visitors staying in commercial accommodation booked/organised their accommodation prior to arriving with only 16% of overnight visitors staying in commercial accommodation indicating that they did not book ahead/just arrived. Interstate visitors just arrived in Caloundra without booking accommodation in advance more often than intrastate visitors.

Transportation
The majority of respondents used their own/friends/relatives or a hire vehicle on their journey to the Caloundra region (92%), while a significant proportion of respondents used air transport on their journey (13%). The majority of domestic visitors to Caloundra used their own/friends/relatives vehicle on their journey to Caloundra, while overseas visitors were more likely to use a combination of air transport and hire vehicle. Of those visitors who travelled to the Caloundra region via air transport, the majority flew into Brisbane Airport (87%), while the remaining 13% flew in to the Sunshine Coast Airport.

Places Visited
Respondents were asked if they had visited or planned to visit a number of locations on their current trip. The Sunshine Coast Hinterland was the most popular location to visit (63%). Maroochydore and Mooloolaba were also popular places to visit (36% and 34% respectively). Other locations that respondents visited or planned to visit included Noosa, Eumundi and Brisbane (24%, 22% and 20% respectively). Overseas and interstate visitors visited more places around South East Queensland on their trip than intrastate visitors.

Activities
The most popular activities were going on a walk (75%) going to a café/coffee shop (64%), going shopping (53%), going to the beach (52%) and visiting friends and relatives (46%). Visiting Mary Cairncross Park was also a popular activity (44%), however it should be noted that more than a third of interviews took place at Mary Cairncross Park (37%). Interstate and overseas visitors participated in more activities during their stay in Caloundra than intrastate visitors.

6.3 Opinions and Satisfaction

Possible Improvements
When asked for possible improvements to the area, 10% of respondents suggested improved/more parking. Other improvements suggested were to improve or provide more public facilities/amenities/parks (9%), to provide more entertainment/activities/attractions (8%), to provide more or improve public transport (8%) and to improve Caloundra's roads and traffic flow (7%). Six percent (6%) of respondents indicated that an improvement to the area would be to see development restricted, with no high rises being a common response.

A higher proportion of overseas visitors suggested improved public transport as a possible improvement to the Caloundra area, while a higher proportion of interstate visitors suggested improved/more signage. Improved parking and improved traffic flow/roads was an improvement mentioned more often by intrastate visitors. Improved/more public transport was mentioned more often in the June 2004 sample, than in the previous three waves. Restricting development (e.g. no more high-rises) was not mentioned as frequently in the June 2004 sample as it was in the previous three samples.

Improved/more public transport was mentioned more often in the June 2004 sample, than in the previous three waves. Restricting development (e.g. no more high-rises) was not mentioned as frequently in the June 2004 sample as it was in the previous three samples.

Visitor Satisfaction
The top five mean ratings received were for the beaches (4.64), the range of accommodation (4.59), the friendliness of locals (4.48), accommodation-value for money (4.39) and that there is lots to see and do in Caloundra (4.37). The bottom five mean ratings received were for the availability of public transport (2.76), the nightlife/entertainment (3.24), the attractions-value for money (3.83), the car park facilities (3.84), and the Caloundra CBD streetscape (3.87). However it should be noted that public transport was the only aspect in which the mean was below the scale midpoint of 3 (neutral). Almost all respondents were either satisfied or very satisfied with their overall experience in the Caloundra region (94%). Only 1% (2 respondents) indicated that they were dissatisfied with their overall experience, with six percent rating their overall satisfaction as neutral.

Interstate visitors were more satisfied than intrastate visitors with the availability of tourist information, the range of attractions, the value for money of attractions and the car parking facilities. Intrastate visitors were more satisfied than interstate visitors with the quality of accommodation. There was a decrease in satisfaction for many aspects of Caloundra in January 2004 from satisfaction levels in January 2003 and June 2003. However satisfaction levels in June 2004 have increased again to levels similar to January 2003 and June 2003 levels. One anomaly to this general trend is satisfaction with availability of public transport in the region, which has shown a steady decline since 2003.

Development of Caloundra
Respondents were asked how they would like to see Caloundra develop in the next five years. One in four respondents said they would like no more development in Caloundra/it should stay the same (28%). One in five respondents said development should be less commercial or overdeveloped and less like the Gold Coast or Maroochydore/Mooloolaba (22%). Sixteen percent (16%) of respondents indicated that they would like to see development restricted particularly restricting/stopping high-rise development.

A higher proportion of interstate and intrastate visitors compared to overseas visitors wanted Caloundra to not develop at all or to be less commercial/overdeveloped/not like Gold Coast. A smaller percentage of respondents in the June 2004 sample wanted more public/tourist facilities/activities compared to the January 2004 sample.

7 Appendix

7.1 Appendix A – Possible Improvements "Other" Responses

Improvements
Less coffee shops
Revamp CBD
Stay same (families)
Get rid of pine trees on Bullock beach, house boats in area
More police patrols RE; Hoons of an evening (2-3am), keep sea side pool (saltwater)
Cheap home so can move
Direct flights to Caloundra
Too overpriced
Vote the council out
Cheaper real estate prices
More dog and animal friendly
Esplanades changed to esplanade & beach names i.e. kings esplanade
Main street mall
Poker machines should pay more
Should be able to smoke everywhere
Keep the trees in the main street
More modern
More disability access & facilities more disability friendly
Just leave it as it is and don't cut out those trees over there (woolworths site) we need places like these because we can come here and go back to nature love is very important together people get here
More affordable family accommodation
I think the biggest thing is there's a lot of people coming to the area so you've got to make it able to cope with the numbers.
Better service
Make sure the atmosphere maintained big markets like eagle street Maleny
No bush turkeys
Make things a little bit cheaper to draw more people in otherwise its pretty good
Has a character of its own. Don't over promote
Right-hand driving from Sweden
More hospital facilities
More accessible for people with disabilities & wheelchairs
More overnight stays for motor homes
More national Parks
More green space
More affordable family orientated places/venues
Maybe a few more camping & picnic areas but don't knock down trees
Bigger tourist centre
Disabled facilities. Disabled facilities as close as possible.
Kid friendly
Disabled access toilet
Get rid of the hoons
Not enough police patrols
Taxis
More road side rest areas between sunshine & gold coast
Graduate high rises so everyone gets a view
Keep foreshore natural
Tired looking buildings, clean up the old ones pretty tacky
Easy & accessible to all
Better main street

Value for money

More camping facilities

To be different

Less coffee shops on the beach

I don’t want to see franchises. No maccas, no kfc, no pizza hut. It ruined Airlie Beach. I don’t think they're ready for a woolies here keep it for the small shops. It would kill off the uniqueness of the area and people wouldn't want to come here.

Keep it natural

Leave more natural beauty natural

7.2 Appendix B - Development of Caloundra "Other" Response

Development

More tourist information to see available in small units. Develop esplanade along Golden Beach
Less houses. Not splitting up farms
Keep development low, stay in character
More direction facilities,
Just nice & family orientated as is.
Well thought out planning
Turn back the clock
To the best of its ability
They couldn't develop any better than now
They cant do much more than what they're doing so whatever they do is quite good
Slowly-not!
Same way its going
Remain friendly & retain atmosphere
Population cap & more infrastructure
Not too much change
Not too Crazy
Not to increase its population
Not- make it quieter. Curb the sprawling housing developments
Not growing because that's a big problem its growing too quickly
More user friendly
More of the same
More family friendly
More advertising
Maybe a bit more focus on the beaches they are pretty good you could capitalise on that
Maintaining its family feel
Maintain the facilities and keep the rural feel
Maintain a discrete balance between tourist demands & ecological demands. Kiss principle understated
Lots of high rise apartments
Lifeguards on Moffat beach & Shelly beach
Keep it going as it is
Its well developed already it's a good place to visit not too far away from Brisbane
Its going ahead quite well so keep going ahead as is
I would like to see population density controlled, as in Noosa. I think Caloundra should do the same
I cant see its big enough now to develop it more what about safety
Go backwards
Easy access to the facilities
Don't lose its small appeal- family orientated
Better customer service. Better quality of goods
Backwards
Affordable waterfront unit for personal use
More defined family areas and nightlife areas more clearly defined, more taps here
Better streets open up more
More money put into public transport & health- more hospitals.
Target families
Retain the beach cottages
Sensitive development for the numbers
Real estate prices level off
Keep the friendly atmosphere
Superstructure work with population development
Lose its family appeal needs to cater for everyone.
Community focused Keep its laid back atmosphere

Id like to see the uniqueness at the Caloundra area very carefully protected
With sensitivity.
Better infrastructure
Keep the Queenslanders
Tear some units down
More advertising of events