

**TOURISM QUEENSLAND**

**Caloundra Visitor Survey**

**Final Report**

**January 2003**

Report prepared by the Tourism Queensland Research Department

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## 1 Introduction

The Caloundra Visitor Survey was undertaken by the Tourism Queensland Research Department, in association with Caloundra Tourism Levy Board, 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; and
- to measure visitor satisfaction and appeal with specific aspects of Caloundra.

This report presents the findings of the January 2003 Caloundra Visitor Survey.

## 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, Landsborough, Beerwah, Beerburum, Minyama, Currimundi and Golden Beach/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 origin, trip purpose, level of repeat visitation, appeals, activities, satisfaction and demographics.

Interviewing was conducted from Wednesday 8 January to Tuesday 21 January 2003 between the hours of 8am and 6pm. Volunteers, who were recruited by Caloundra Tourism and trained by Tourism Queensland staff, conducted the interviews. Interviewing was conducted in the following locations:

Interview Location	N	%
Kings Beach	94	23%
Bulcock St	83	21%
Mary Cairncross Park	75	19%
Maleny	59	15%
Maple Street	39	10%
Bulcock Beach	38	9%
Currimundi	8	2%
Location not specified	7	2%
	<b>403</b>	<b>100%</b>

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, means comparisons, regression and cluster analysis.

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. Please note that 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: **Travel Party, Origin and Repeat Visitation.**

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.

### 3 Top Line Findings

This section presents the top line findings of the 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.

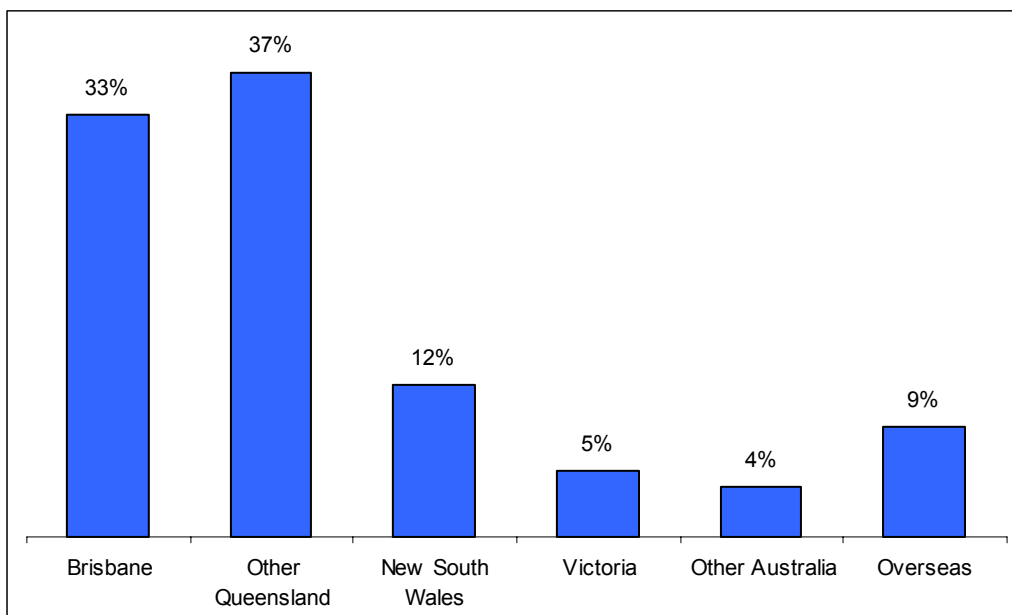
#### 3.1 Visitor Details

The survey included a number of questions about respondents.

##### 3.1.1 Source Markets

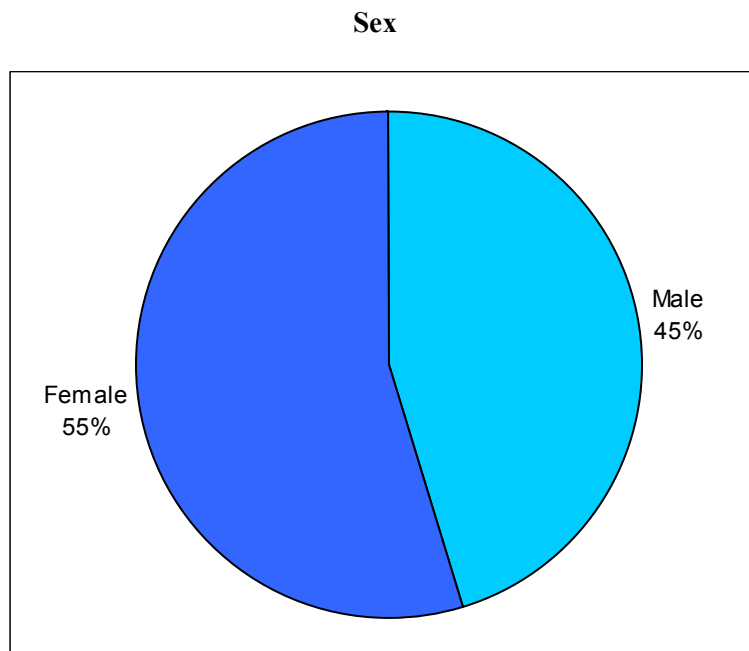
The majority of respondents were from intrastate (70%), with 33% from Brisbane and 37% from Queensland regions (excluding Brisbane). A further 12% of respondents were from New South Wales, while the overseas market represented 9% of respondents. Visitors from Victoria and other states of Australia represent only a small proportion of respondents (5% and 4%, respectively).

**Origin**



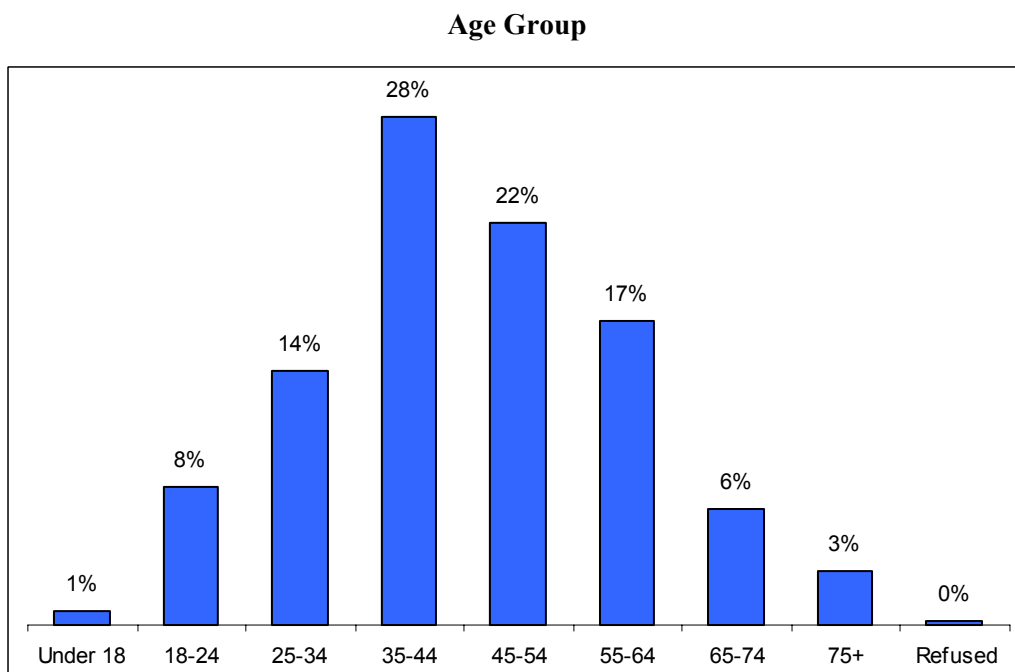
### 3.1.2 Sex

The sample is slightly skewed towards females (55%).



### 3.1.3 Age

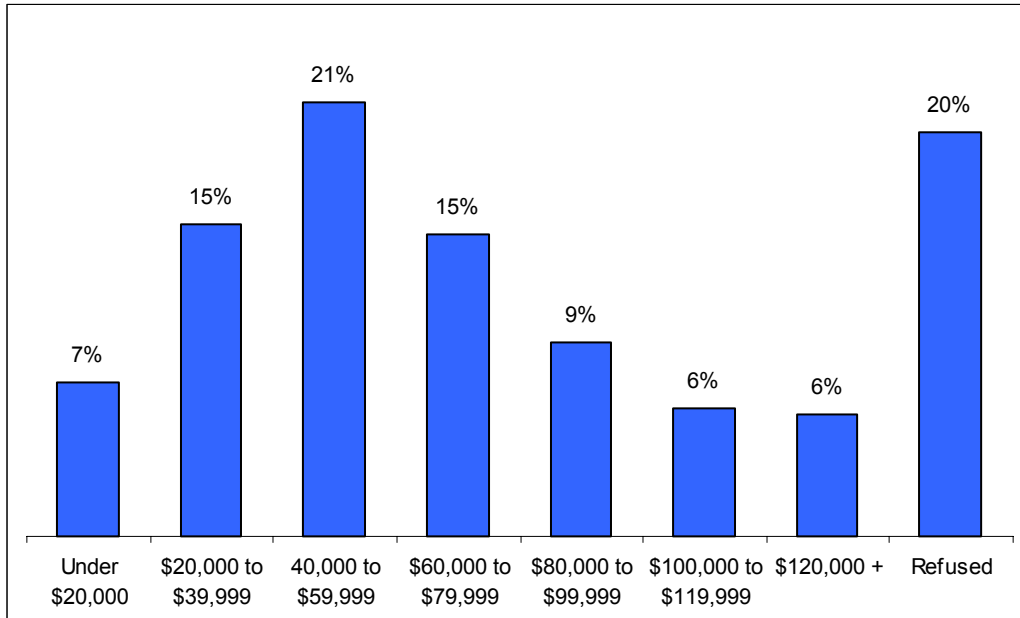
There is a range of ages represented within the sample group, with half (51%) being under 45 years of age and half (49%) being 45 years or over.



### 3.1.4 Income

Almost two-thirds of respondents (59%) have an annual household income of \$80,000 or less.

**Household Income**



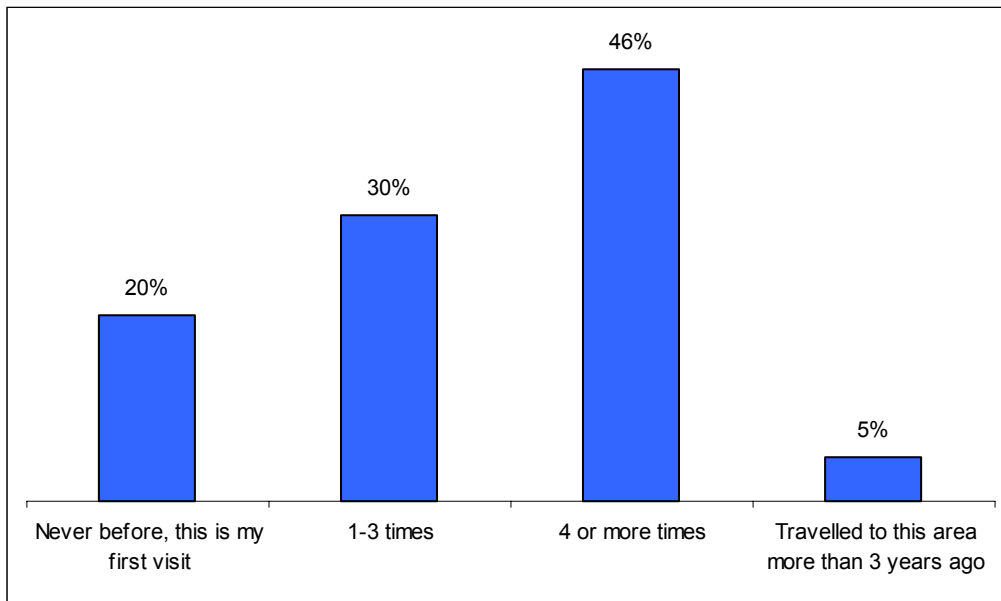
### 3.2 Details of the Visit

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

#### 3.2.1 Previous Visitation

Most respondents have visited the region before, with over three-quarters having visited Caloundra at least one other time in the previous three years (76%).

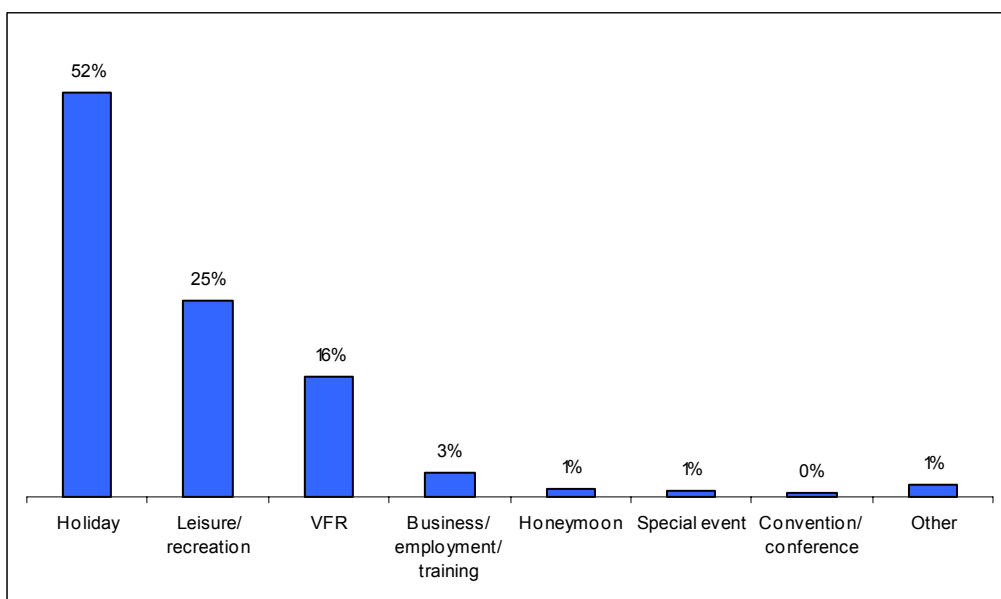
**Number of Visits to Caloundra in the Last Three Years**



#### 3.2.2 Main Purpose

Respondents were asked the main purpose of their trip. Most respondents were visiting for a holiday (52%), or for leisure/recreation purposes (25%). A small proportion of respondents travelled to Caloundra to visit friends or relatives (VFR) (16%).

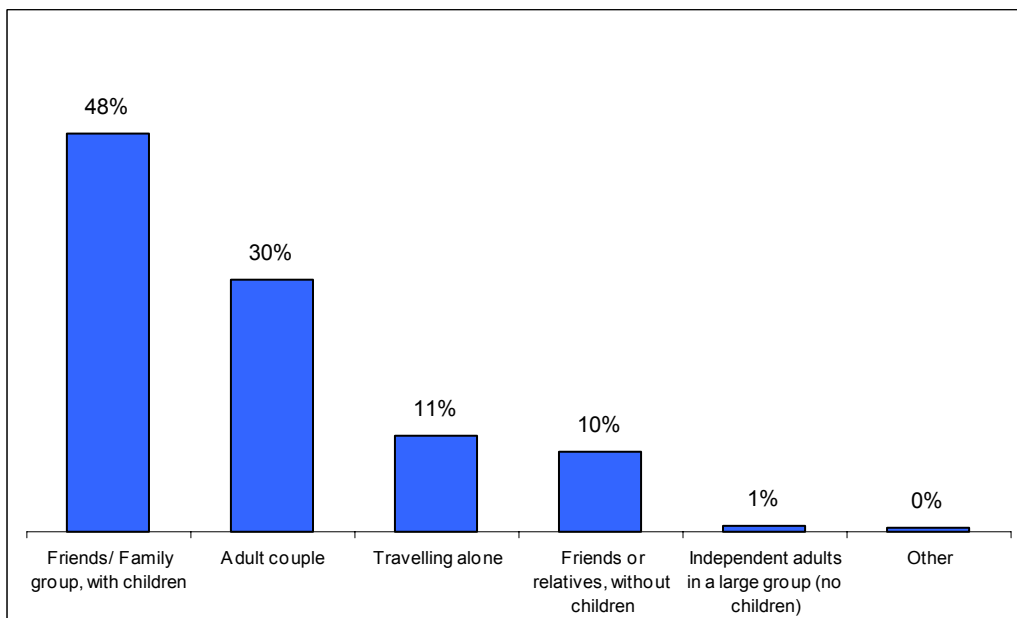
**Main Purpose of Trip**



### 3.2.3 Travel Party

A large proportion of respondents travelled as a group of friends or family with children on their visit to Caloundra (48%). Almost one-third of respondents travelled as an adult couple (30%).

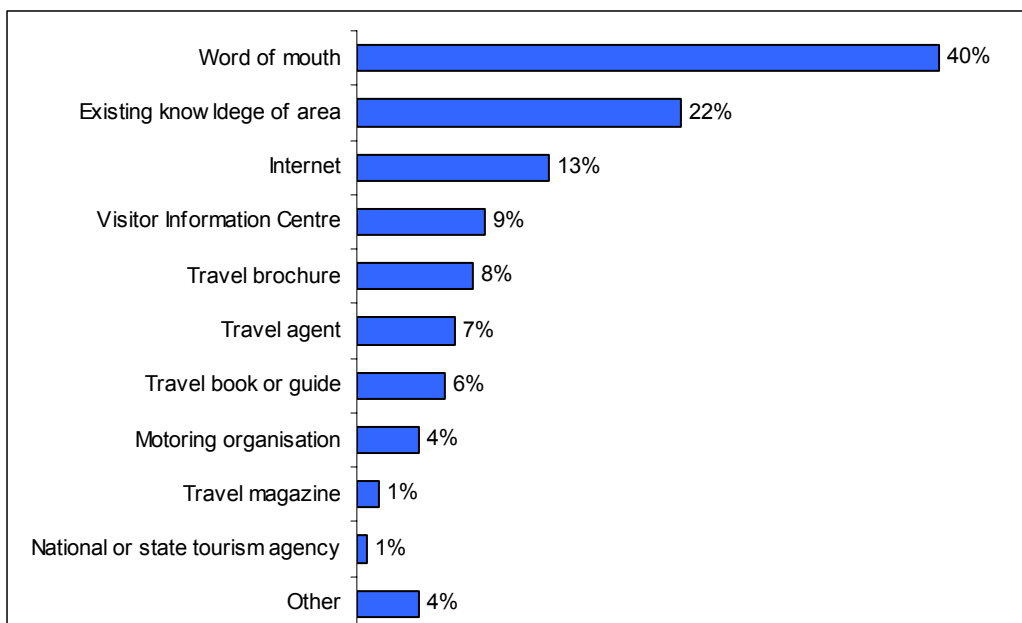
**Travel Party**



### 3.2.4 Information Sources

Respondents were asked about the information sources they used when planning their trip to the Caloundra region. Word of mouth was the most popular source of information (40%), followed by existing knowledge of the area (22%).

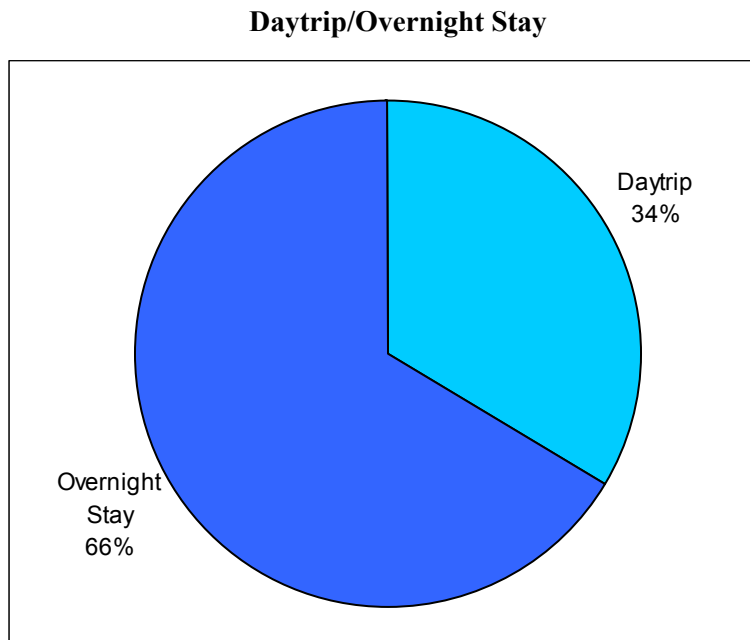
**Information Sources**



*\*\*Existing knowledge of area” was not on the pre-coded list for this question.*

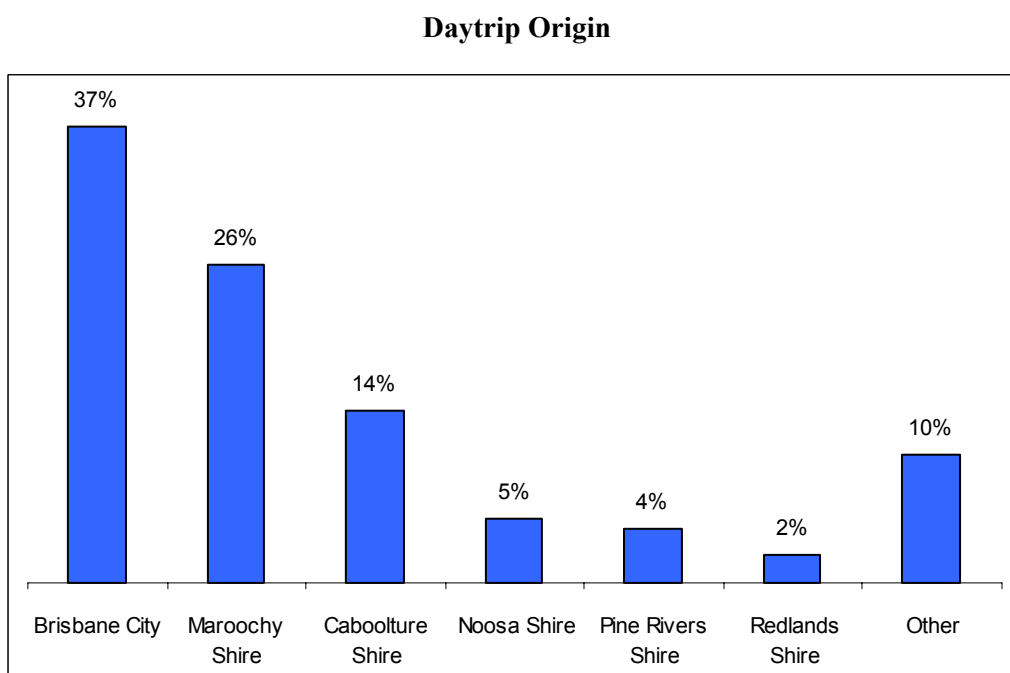
### 3.2.5 Daytrip/Overnight Stay

Thirty-four percent (34%) of those interviewed were on a daytrip to the Caloundra region and 66% were staying overnight.



### 3.2.6 Daytrip Origin

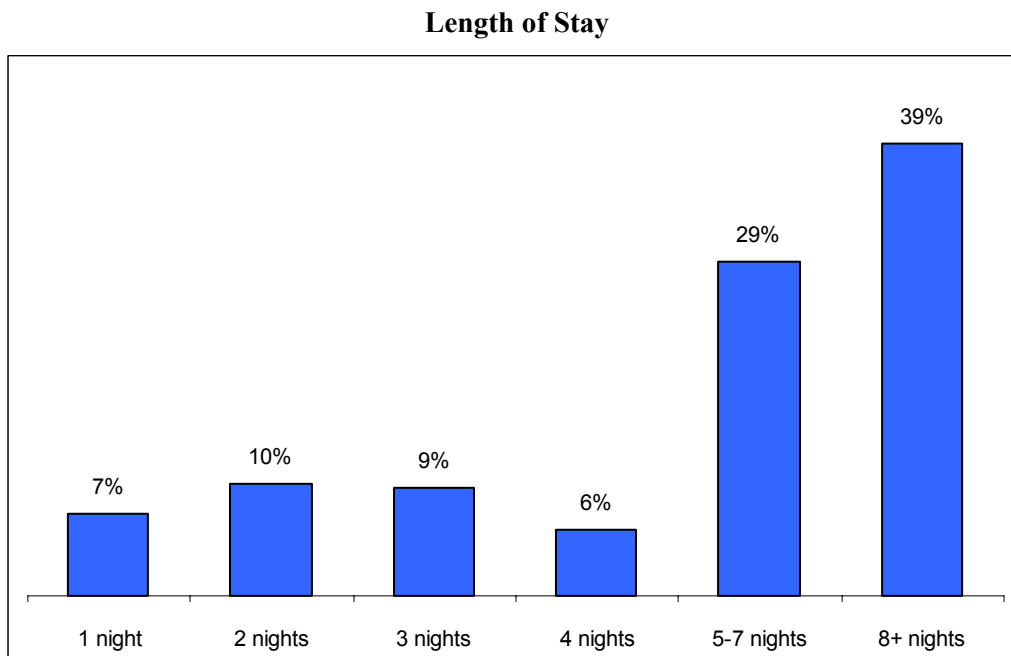
Respondents who were on a daytrip were asked where they had travelled from prior to arriving in the Caloundra region. Respondents on daytrips were most likely to have travelled to the Caloundra region from Brisbane City (37%). A significant proportion of those who were on a daytrip also travelled from other areas of the Sunshine Coast, with 26% from the Maroochy Shire and 5% from the Noosa Shire.



Base=Daytrip Visitors Only (n=135)

### 3.2.7 Length of Stay

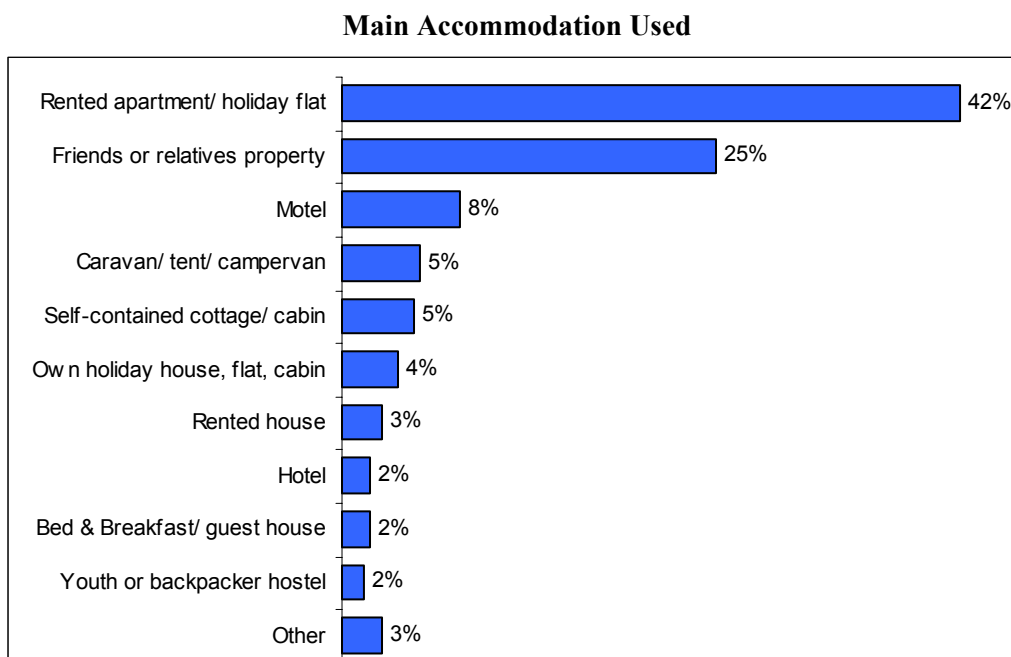
Overnight visitors were asked how many nights they were spending in the Caloundra region. The majority were staying for five or more nights in the region (68%), with 39% spending eight or more nights and 29% spending between five and seven nights.



Base = Overnight Visitors Only (n=266)

### 3.2.8 Accommodation Used

Rented apartments/holiday flats are the most popular form of accommodation, with 42% of those who stayed overnight utilising this type of accommodation. Staying in the home of a friend or relative also accounted for a large proportion of respondents (25%).

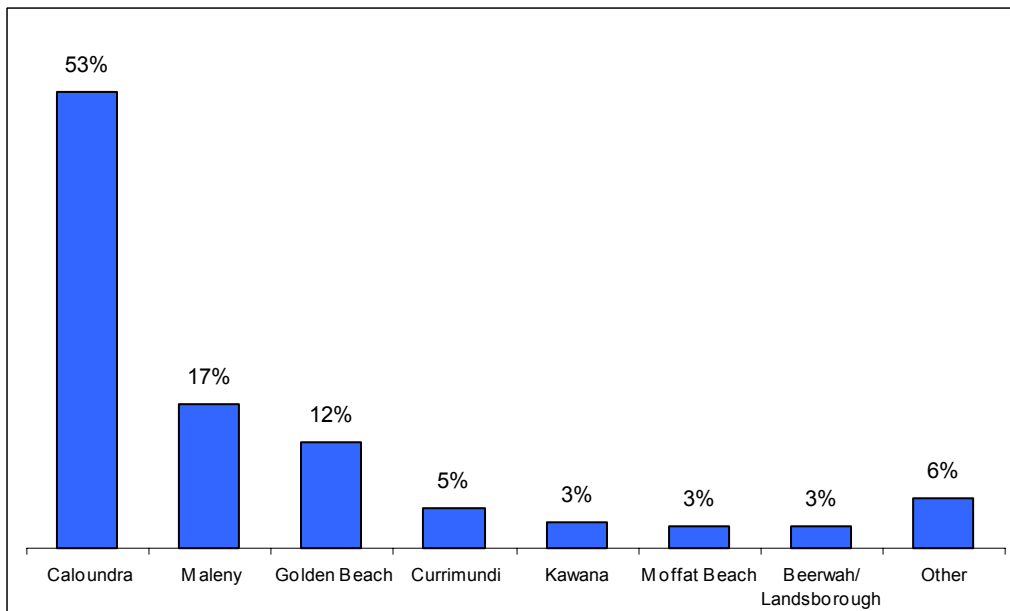


Base = Overnight Visitors Only (n=264)

### 3.2.9 Accommodation Location

Most respondents were staying in Caloundra City (53%). A further 19% were staying in the Hinterland region (i.e. Maleny and Beerwah/Landsborough).

**Location of Main Accommodation**

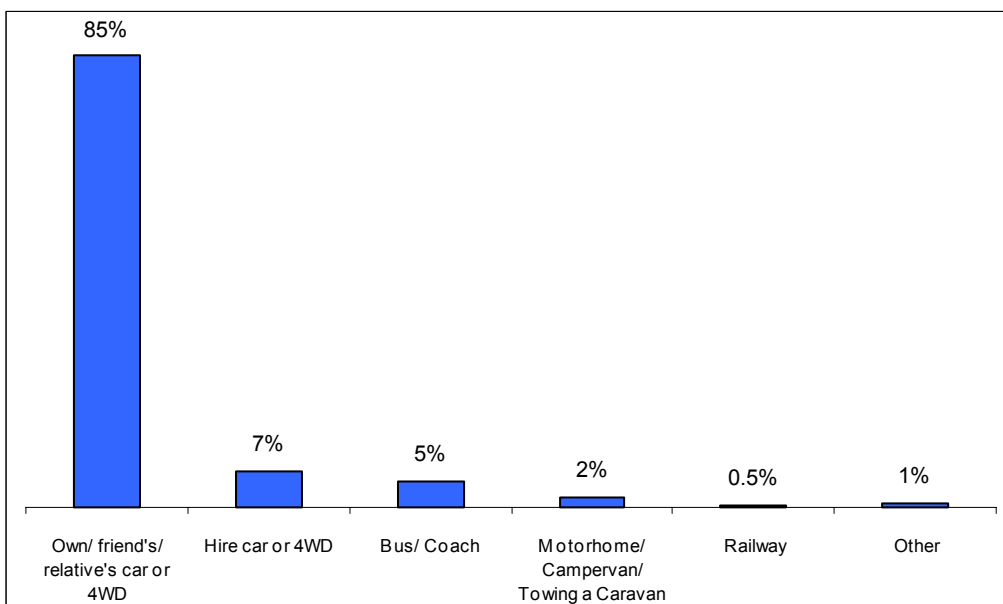


Base = Overnight Visitors Only (n=264)

### 3.2.10 Form of Transportation

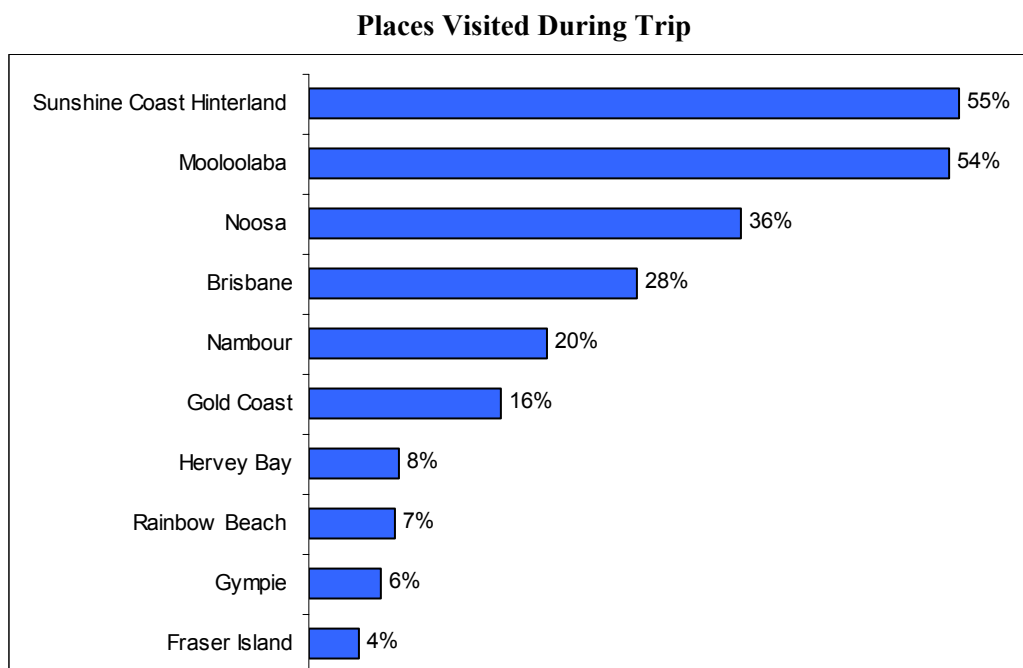
Ninety-two percent (92%) of respondents used a car or four-wheel drive on the last leg of their journey to Caloundra.

**Form of Transport Used**



### 3.2.11 Places Visited

Respondents were asked about places they had visited or intended to visit on their current trip. The Sunshine Coast Hinterland and Mooloolaba were visited by an almost equal proportion of respondents (55% and 54%, respectively). A further one-third of respondents (36%) had already visited or were intending to visit Noosa on their current trip.



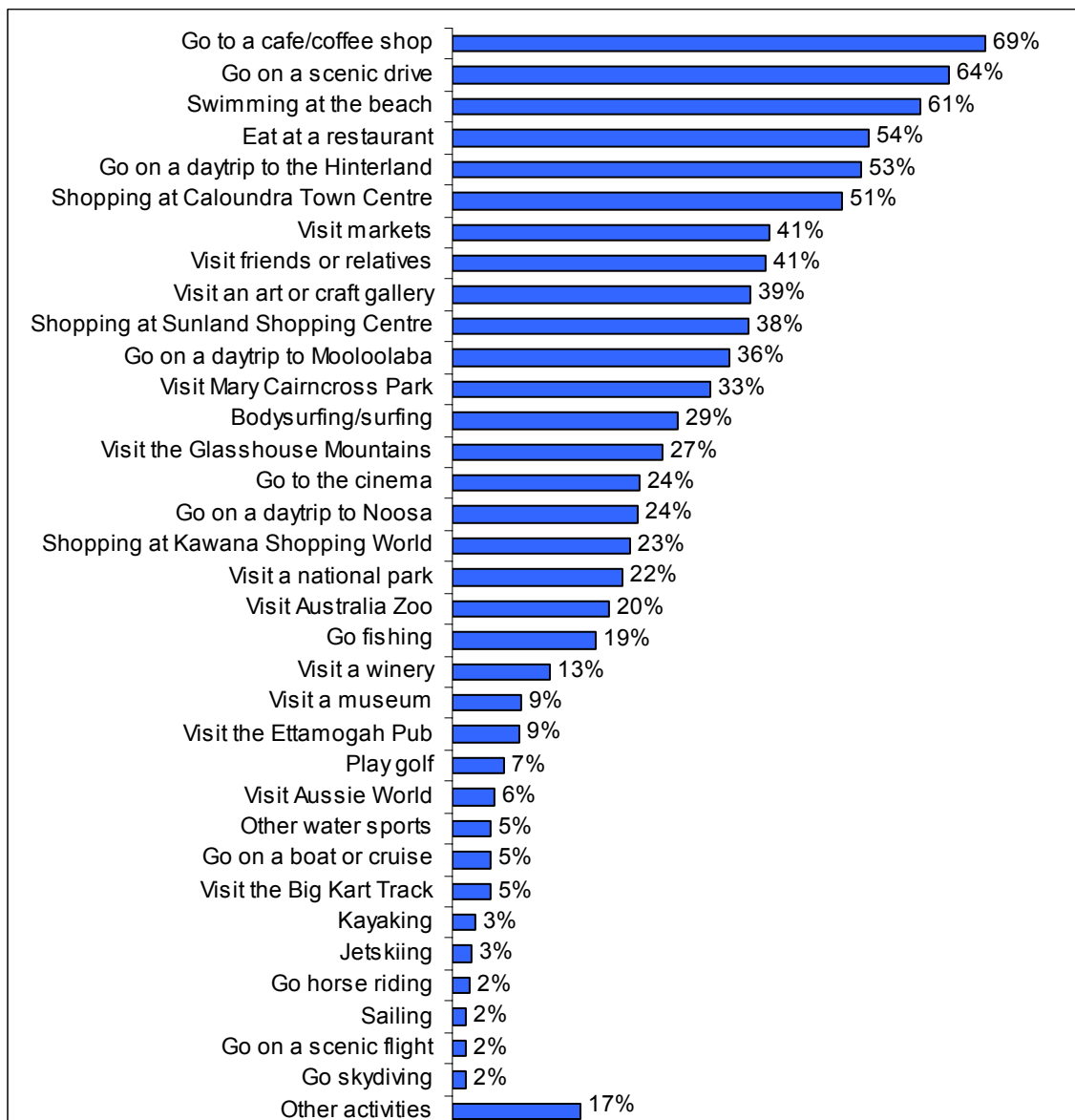
A cluster analysis was performed on the places visited data to find groups of respondents who tended to have similar visitation patterns to areas other than Caloundra on their current trip. Whilst cluster analysis is an exploratory technique, and therefore is only suggestive as to patterns in the data, a three-group model emerged. The three places visited cluster groups can be broadly described as follows:

- **Few-Stops Visitors (39%)** – This group of respondents is characterised by low visitation levels to all areas. Highest visitation levels are to the Hinterland and Brisbane, but these are still less than half the group. Respondents in this group appear more likely than those in other groups to be on their current trip for the reasons of leisure and recreation or to visit friends or relatives, and to have visited the area previously. This group's length of stay in the Caloundra area tends to be short, with around half only visiting for a daytrip. These respondents tend to have lower household incomes.
- **Mooloolaba Visitors (28%)** – Respondents in this group are highly likely to have visited Mooloolaba on their current trip and not many other locations. Respondents in this group also appear likely to have visited the area previously and to be staying in the area in a rented apartment or holiday flat, but are likely to be staying longer than the Few-Stops Visitors. A large majority of this group live in Queensland, with a smaller majority travelling as a family group with children and are aged between 35 and 54 years.
- **Many-Stops Visitors (33%)** – This group is likely to have visited a number of areas on their current trip. The areas most likely to be visited by this group are Noosa, Mooloolaba, and the Hinterland. A large majority of this group stated holidays as being the main purpose of their current trip and are likely to be staying longer in the Caloundra area, although they seem to have visited the area less in the past than those from other groups. Compared with the other groups, respondents in this group are far more likely to be from interstate or overseas, with less than half being from Queensland.

### 3.2.12 Activities

Respondents were asked what activities they had participated in (or planned to participate in) during their stay in Caloundra. The most popular activities were going to a café/coffee shop (69%), going on a scenic drive (64%), swimming at the beach (61%), eating at a restaurant (54%), going on a daytrip to the Hinterland (53%) and shopping at Caloundra Town Centre (51%).

**Activities**



*\*Responses are shown only for those activities listed in the questionnaire*

A cluster analysis was performed on the activities data to find groups of respondents who tended to participate in similar activities whilst in the Caloundra area. Whilst cluster analysis is an exploratory technique, and therefore is only suggestive as to patterns in the data, a three-group model emerged. The three activity cluster groups can be broadly described as follows:

- **Beach-Going Shoppers (41%)** – This group of respondents appear highly likely to participate in water sports, eat at cafes and restaurants, and go shopping in the major shopping complexes. A little less than half of this group also visited (or planned to visit) friends or relatives. Apart from these activities, participation levels in other activities are low. Compared to other groups, respondents in this group tend to have been to the Caloundra area a greater number of times, driven to the area in their own car, stayed in accommodation located in Caloundra and live in Queensland. Over half of this group stayed in the area for 5 or more nights, are aged between 35 and 54 and travelled to the area as a family group.
- **Do-All Activity Participants (25%)** – This group is highly active with high levels of participation in a broad range of activities. In particular they were very likely to be involved in water sports, visiting markets, eating at cafes and restaurants, shopping in the major shopping complexes, visiting nature attractions, scenic drives and daytrips. Compared with the other groups, large proportions of respondents in this group also visit built attractions and visit friends or relatives. This group is more likely than other groups to be staying longer in the Caloundra area, to be visiting from interstate (though still over half are from within Queensland), and also appear to have slightly higher annual household incomes.
- **Sightseers (34%)** – This group seems interested in only a small number of activities. These activities are visiting nature attractions, going on a scenic drive and going on a daytrip (especially to the Hinterland). Most this group are only visiting the area for a daytrip and are from Queensland. Of those who are staying one or more nights, around half are staying in Maleny.

### 3.2.13 Activities Would Like to See Available

Respondents were asked if there were any activities they would like to see available in the Caloundra region that they weren't able to do on their current trip. Suggestions from the 39 respondents who answered this question are listed in the table below.

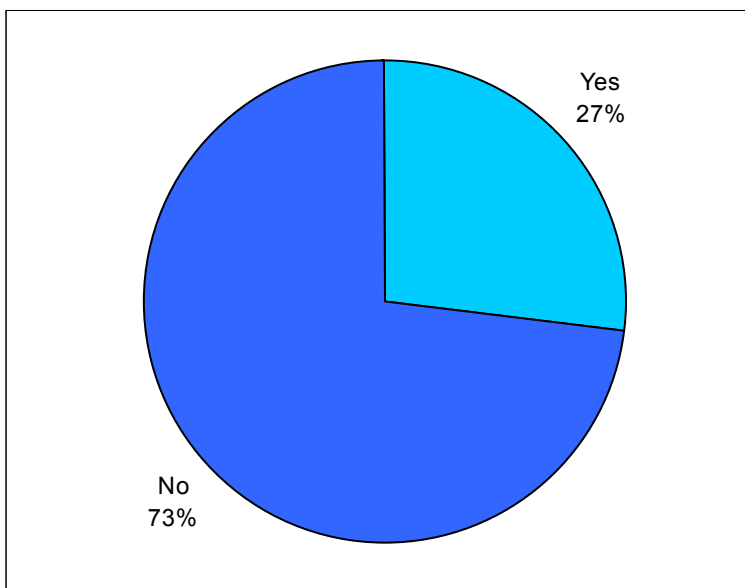
#### Activities Would Like to See Available

<b>Water sports/ water based activities (14 responses)</b>
<i>Hiring a jet ski</i>
<i>Hire a surf ski (paddle); surf kayaking</i>
<i>Jet skiing</i>
<i>Fresh water skiing</i>
<i>Hiring water sports gear</i>
<i>Hire boats (paddle); More fishing boat hire</i>
<i>Paddle boats at Bulcock Beach</i>
<i>Hire of Jet Ski</i>
<i>Marina</i>
<i>Surf classes</i>
<i>Surf competitions</i>
<i>Wave machine at Moffat beach</i>
<i>Fly fishing trips</i>
<i>Indoor public heated pool/aquatic centre</i>
<b>Children/ family friendly activities/ facilities (5 responses)</b>
<i>Day crèche - so parents can have free time to enjoy attractions</i>
<i>Child minding centre</i>
<i>More children's activities</i>
<i>Child friendly cafes, restaurants</i>
<i>Something for teenagers e.g. ice-skating</i>
<b>Cinemas/ theatres (4 responses)</b>
<i>Upgrade cinema</i>
<i>Better cinema</i>
<i>Big cinema screens!</i>
<i>More theatre/plays etc.</i>
<b>Shopping (3 responses)</b>
<i>No shopping to attract people in the town centre</i>
<i>Antique shops</i>
<i>Main thing lack is a big complex eg Big W in Caloundra itself</i>
<b>Walking tracks/ bikeways (3 responses)</b>
<i>More walking tracks!</i>
<i>More designated bush walks</i>
<i>Safer bike ways</i>
<b>Other activities (9 responses)</b>
<i>Kings beach SLSC developed - small restaurants; remove salt water pool</i>
<i>More places like Mary Cairncross Park, more rainforests, more natural habitat</i>
<i>Fun rides, e.g. Movieworld</i>
<i>More pubs</i>
<i>Horse riding (x2)</i>
<i>Not enough golf links - should be one in Maleny</i>
<i>Circuit tourist shuttle</i>
<i>Motor cycle riding - road touring etc</i>
<i>Hot air ballooning</i>

### 3.2.14 Advertising Recall

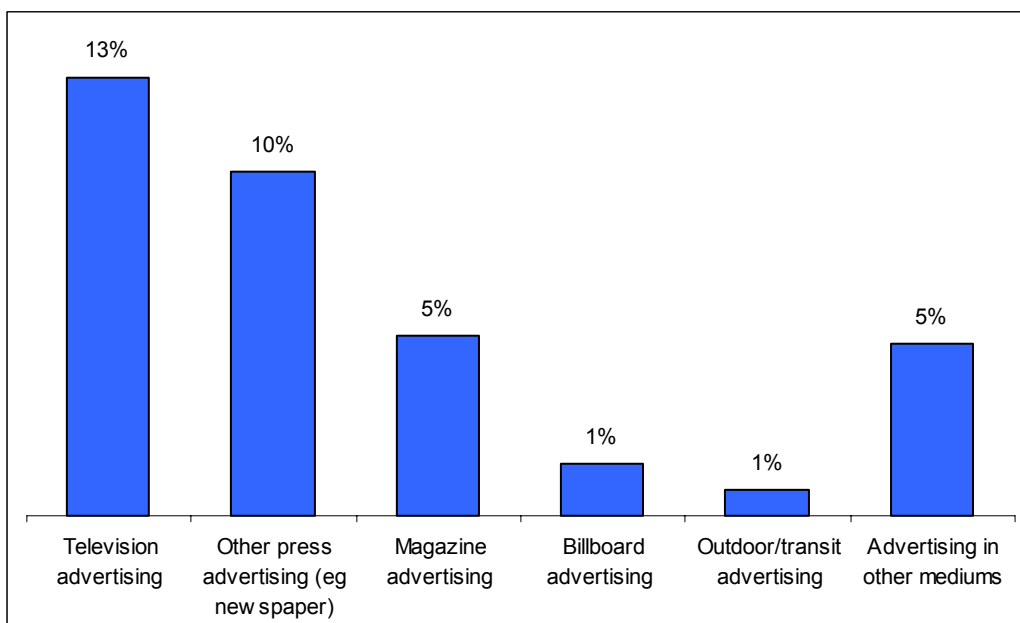
Respondents were asked whether they recalled seeing any advertising for the Caloundra region before leaving home. Twenty-seven percent (27%) of respondents recalled seeing some form of advertising relating to the Caloundra region.

**Advertising Recall**



Respondents were also asked about the mediums where they recalled seeing advertising for the Caloundra region. Thirteen percent (13%) of respondents recalled seeing television advertising for the region, while a further 10% recalled seeing other press advertising (e.g. newspapers).

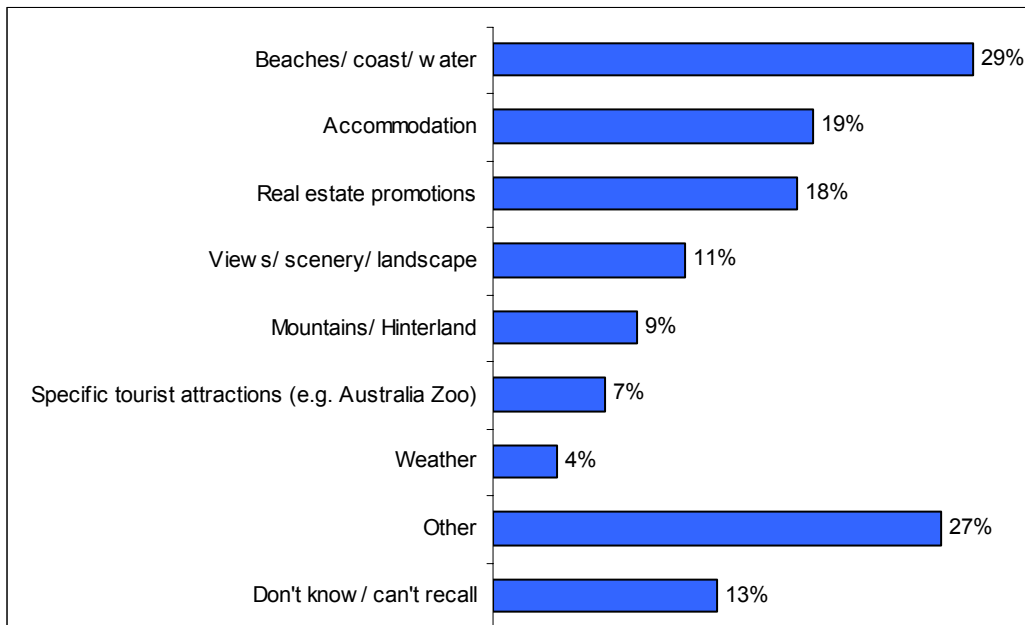
**Advertising Mediums Recalled**



Base = All respondents (n=403)

Respondents were asked what they specifically recalled about the advertising they had seen for the Caloundra region. Of those who recalled seeing advertising, 29% remembered seeing beaches/coast/water. An almost equal proportion of respondents recalled seeing accommodation or real estate promotions (19% and 18%, respectively).

**Aspects of Advertising Recalled**



Base = Respondents who recalled seeing advertising (n=105)

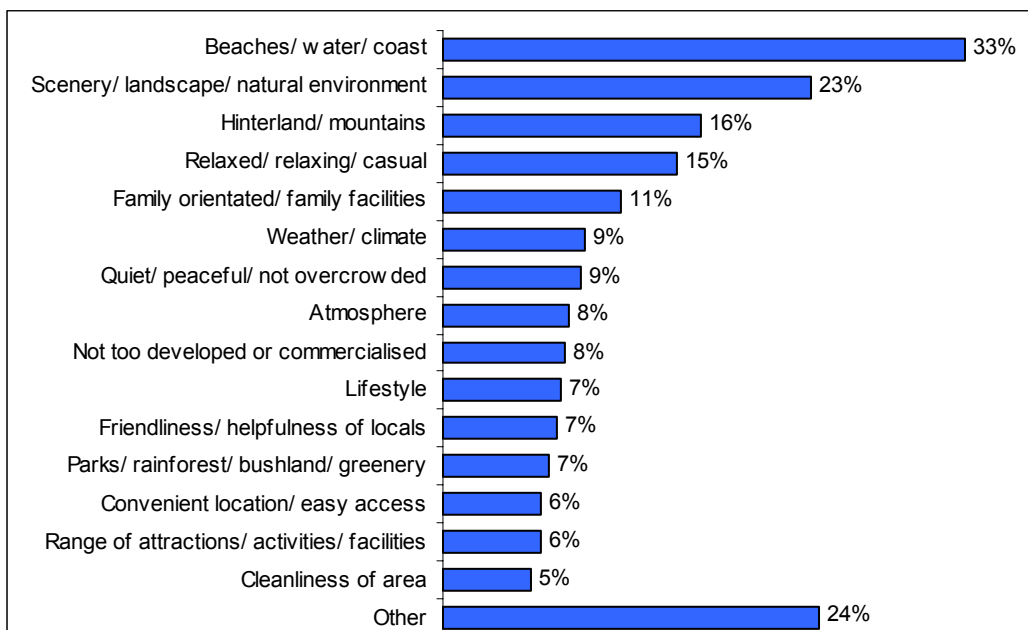
## 4 Opinions and Satisfaction

Respondents were asked questions about what aspects of Caloundra they found most appealing and what improvements they think could be made 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.

### 4.1.1 Appealing Aspects

The beaches/water/coast (33%) and the scenery/landscape/natural environment (23%) were identified as the most appealing aspects of Caloundra.

**Most Appealing Aspects**



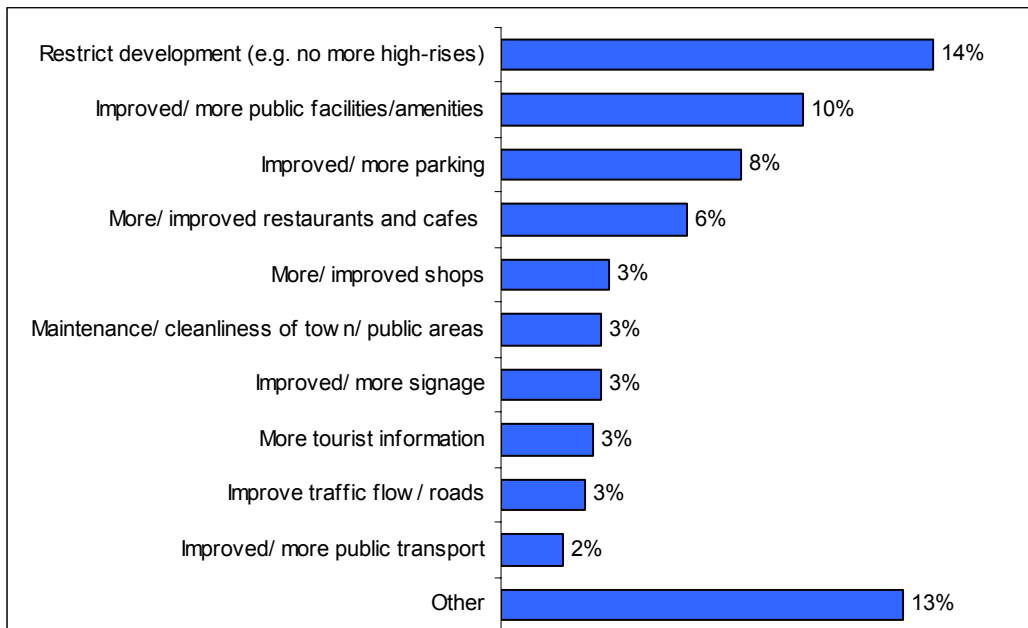
*\*Multiple responses accepted*

*\*\*“Other” consists of a range of responses, each mentioned by less than 3% of respondents*

### 4.1.2 Possible Improvements

When asked for possible improvements to the area, 14% of respondents explicitly stated that they would like to see development in the region restricted. The most popular improvement suggested was to improve or provide more public facilities/amenities (10%).

**Possible Improvements**



*\*Multiple responses accepted*

*\*\* "Other" consists of a range of responses, each mentioned by fewer than 2% of respondents*

### 4.1.3 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 friendliness of locals (4.55), weather during the visit (4.49), the cleanliness of beaches (4.43), the quality of beaches (4.42) and lots to see and do (4.41). The bottom five mean ratings received were for the availability of public transport (3.54), nightlife/entertainment (3.55), the current level of development (3.71), car park facilities (3.84) and value for money at attractions (3.90).

Regression analysis was conducted to determine which aspects had the most influence on overall satisfaction with the region. For the Caloundra respondents, satisfaction with the beaches had the largest influence on overall satisfaction, followed by the friendliness of locals.

#### Satisfaction with Aspects of Caloundra

	N	Mean	TOTAL Dissatisfied	Very Dissatisfied 1	2	Neutral 3	TOTAL Satisfied	4	Very Satisfied 5
Friendliness of locals	373	4.55	0%	0%	0%	3%	97%	38%	58%
Weather during your visit	387	4.49	1%	1%	1%	6%	93%	35%	58%
Cleanliness of beaches	301	4.43	2%	1%	1%	5%	93%	40%	53%
Quality of beaches	301	4.42	1%	0%	1%	10%	89%	36%	53%
Lots to see and do	360	4.41	1%	0%	1%	9%	90%	37%	53%
Beaches overall	303	4.41	0%	0%	0%	9%	91%	40%	50%
Personal safety and security	385	4.34	1%	0%	1%	8%	91%	47%	44%
Accommodation range	216	4.34	3%	0%	2%	10%	88%	38%	50%
National parks	223	4.34	2%	0%	2%	10%	88%	40%	48%
Availability of tourist information	301	4.29	5%	1%	4%	10%	85%	35%	50%
Access/transport to Caloundra	327	4.27	3%	0%	2%	13%	84%	38%	46%
Locals' knowledge about Caloundra	209	4.22	1%	0%	1%	16%	83%	42%	41%
Beach facilities	286	4.19	3%	0%	3%	16%	81%	40%	41%
Attractions range	315	4.17	3%	0%	3%	17%	80%	39%	41%
Accommodation quality	207	4.17	2%	0%	2%	15%	83%	45%	38%
Accommodation overall	205	4.16	1%	1%	0%	14%	84%	50%	34%
Availability of tours	114	4.16	4%	2%	3%	18%	78%	34%	44%
Restaurant/cafe range	318	4.15	2%	0%	2%	16%	82%	47%	35%
Accommodation service	194	4.14	3%	1%	2%	15%	81%	44%	37%
Attractions overall	265	4.11	1%	0%	1%	14%	85%	56%	28%
Attractions service	253	4.11	2%	0%	2%	15%	83%	51%	31%
Shopping range	310	4.11	3%	0%	2%	19%	79%	44%	35%
Shopping service	297	4.09	1%	0%	1%	18%	81%	51%	30%
Restaurant/cafe atmosphere	300	4.09	2%	0%	2%	17%	81%	51%	30%
Attractions quality	266	4.07	2%	0%	1%	16%	83%	56%	26%
Restaurants/cafes overall	297	4.06	2%	0%	2%	14%	83%	58%	25%
Shopping overall	299	4.06	1%	0%	1%	15%	83%	60%	24%
Accommodation availability	202	4.03	6%	0%	5%	20%	74%	38%	36%
Accommodation value for money	205	4.03	3%	0%	3%	21%	76%	44%	32%
Restaurant/cafe service	293	4.02	4%	0%	3%	19%	77%	48%	29%
Caloundra streetscape	303	4.02	4%	0%	4%	18%	78%	50%	28%
Shopping quality of goods	289	4.01	2%	0%	2%	20%	77%	51%	26%
Restaurant/cafe quality of food	298	4.00	2%	0%	2%	20%	78%	54%	24%
Signage	365	3.99	5%	1%	4%	19%	76%	46%	30%
Restaurant/cafe value for money	297	3.99	2%	0%	2%	19%	79%	57%	22%
Shopping value for money	294	3.94	2%	0%	2%	25%	73%	51%	22%
Attractions value for money	260	3.90	5%	1%	4%	23%	72%	47%	25%
Car park facilities	363	3.84	9%	1%	8%	24%	67%	39%	28%
Current level of development	348	3.71	12%	5%	7%	25%	62%	36%	26%
Nightlife/entertainment	132	3.55	14%	4%	10%	36%	51%	30%	21%
Availability of public transport	102	3.54	22%	8%	14%	23%	56%	28%	27%
<b>Overall Satisfaction</b>	<b>387</b>	<b>4.39</b>	<b>1%</b>	<b>0%</b>	<b>1%</b>	<b>6%</b>	<b>94%</b>	<b>48%</b>	<b>45%</b>

Scale: 1 = Very Dissatisfied; 5 = Very Satisfied

## 5 Differences by Travel Party

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

Sub-group	Sample Size*
Travelling WITHOUT children	209
Travelling WITH children	192
<b>TOTAL</b>	<b>401</b>

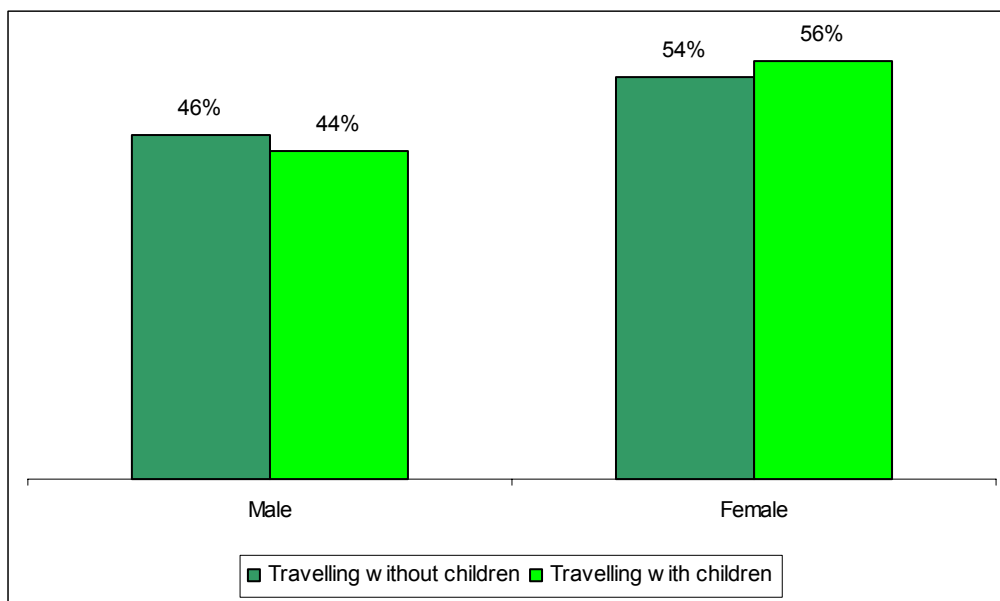
\*2 missing cases

### 5.1 Visitor Details

#### 5.1.1 Sex

Males and females are almost equally likely to be travelling to the region with or without children.

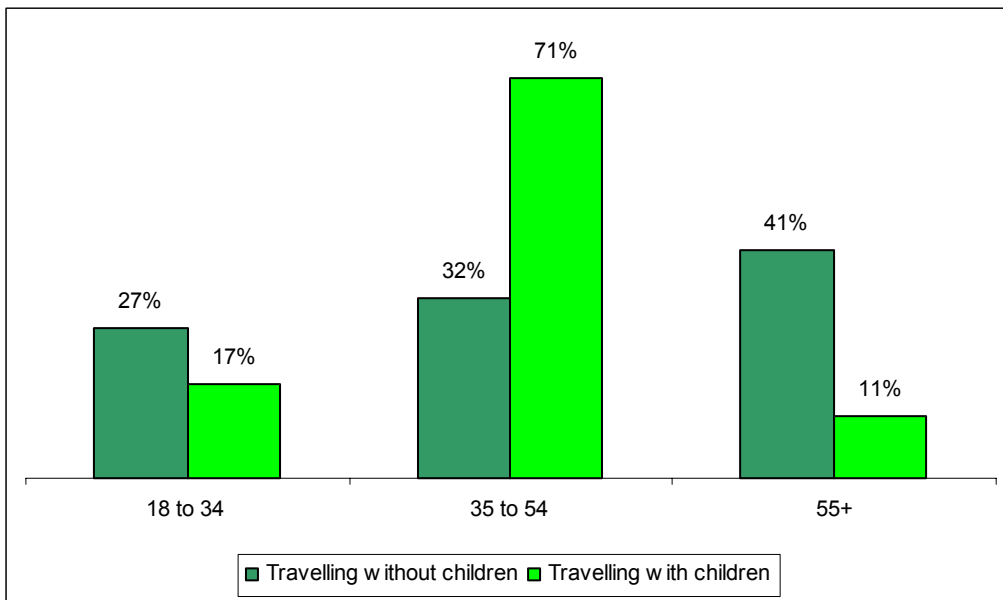
Sex by Travel Party Type



### 5.1.2 Age

People travelling with children are most likely to fall into the 35 to 54 years age group (71%). In contrast, the largest proportion of the people travelling to the Caloundra region without children are aged 55 years or older (41%).

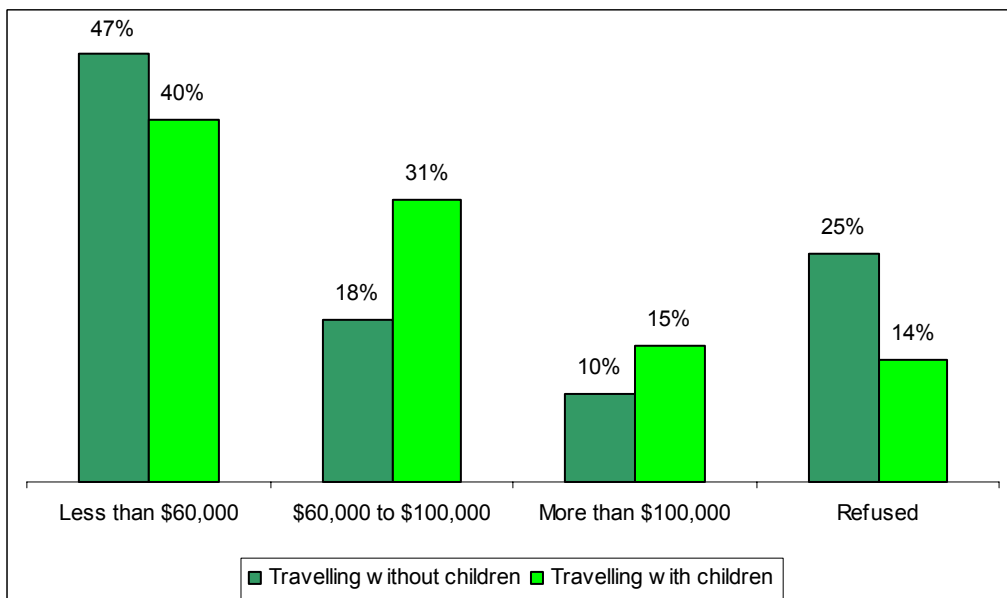
**Age by Travel Party Type**



### 5.1.3 Income

Those travelling with children have higher incomes overall than those travelling without children.

**Household Income by Travel Party Type**

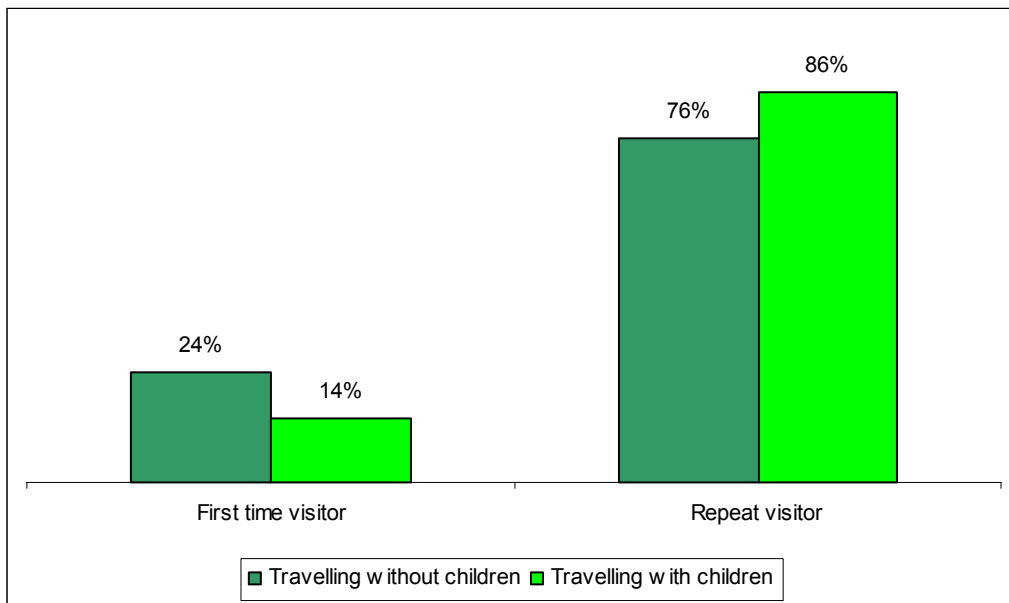


## 5.2 Details of the Visit

### 5.2.1 Previous Visitation

A slightly higher proportion of people travelling to the region with children are repeat visitors (86%) than people travelling to the region without children (76%).

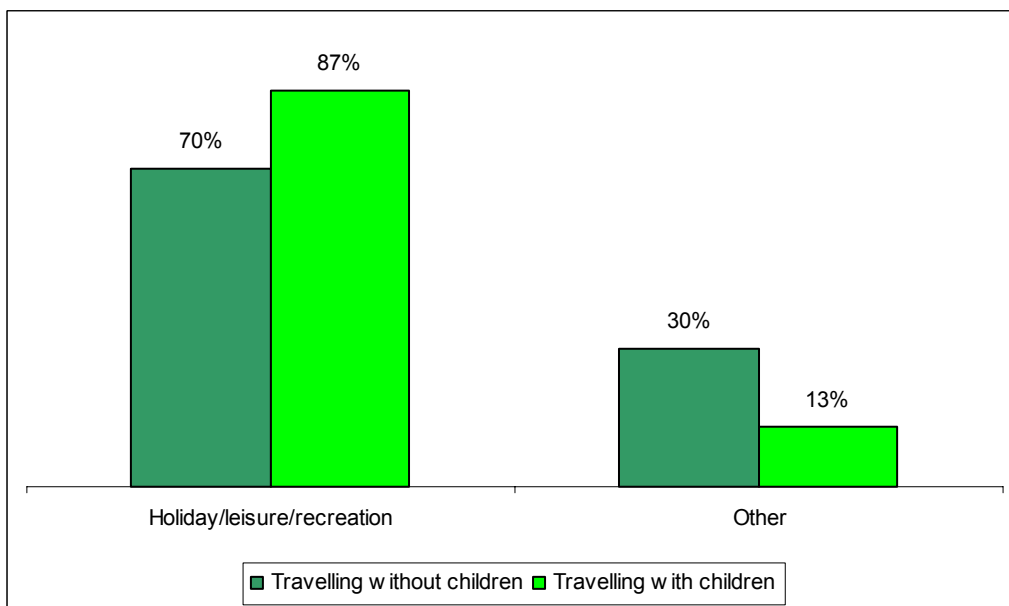
**Previous Visitation by Travel Party Type**



### 5.2.2 Main Purpose

People travelling with children are more likely to be in Caloundra for holiday or leisure (87%) than people travelling without children (70%).

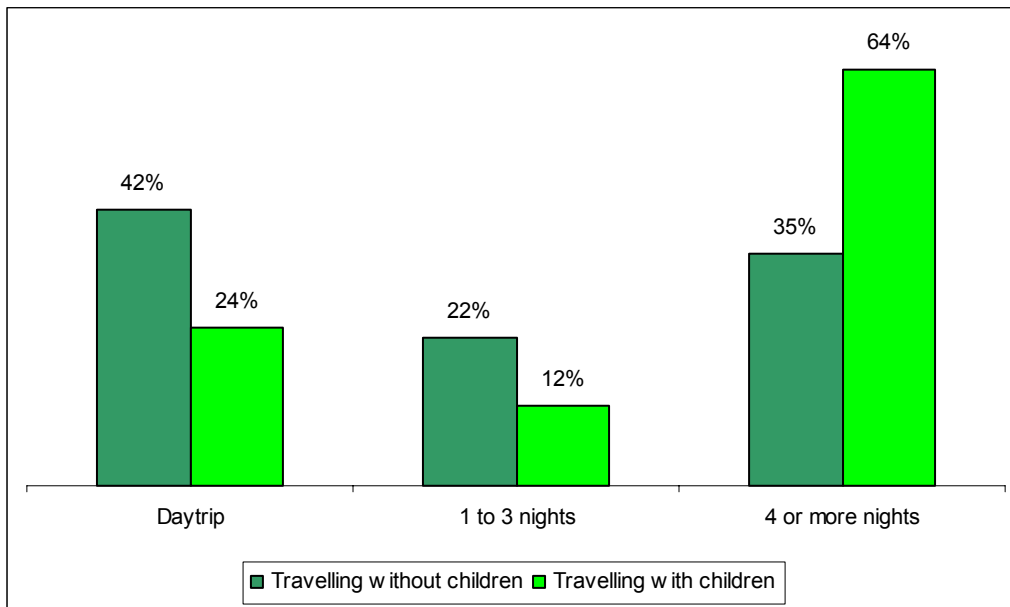
**Main Purpose by Travel Party Type**



### 5.2.3 Length of Stay

A higher proportion of people travelling without children were on a daytrip to the Caloundra region (42%). Those travelling to the region with children were almost twice as likely to be staying in the region for four or more nights (64%) than those travelling without children (35%).

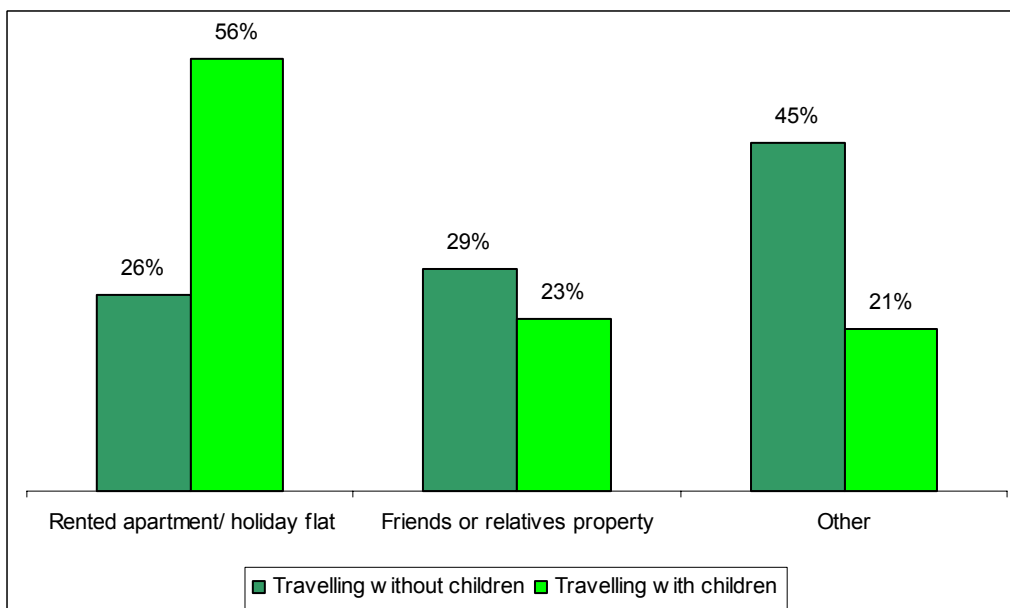
**Length of Stay by Travel Party Type**



### 5.2.4 Accommodation Used

People travelling with children were more likely than people travelling without children to be staying in a rented apartment or holiday flat (56%). Those travelling without children favoured other forms of accommodation.

**Accommodation Used by Travel Party Type**

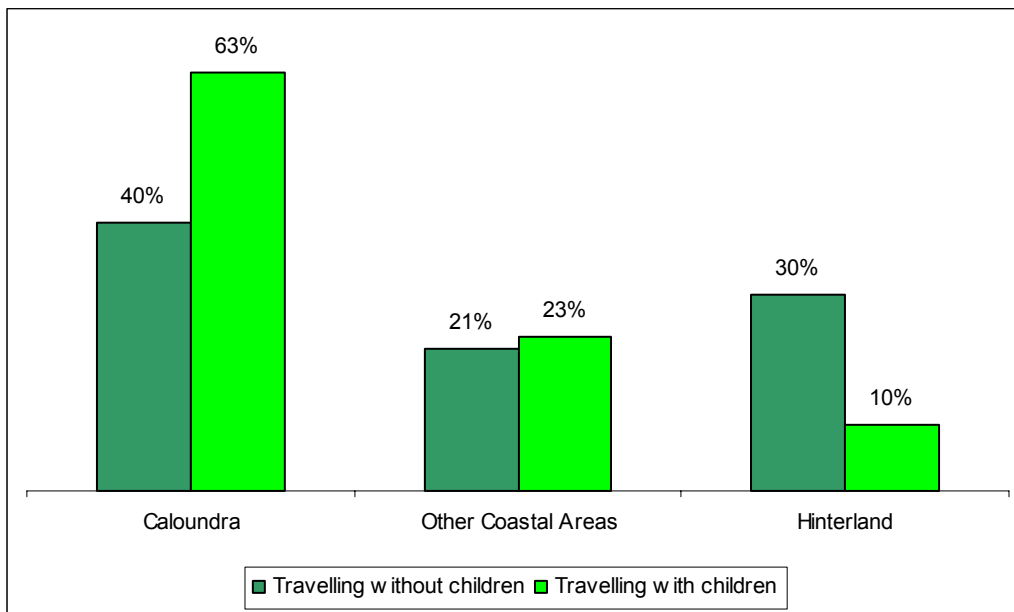


Base = Overnight Visitors Only (n=264)

### 5.2.5 Accommodation Location

People travelling with children were more likely to be staying in Caloundra (63%), while people travelling without children were more likely to be staying in the Hinterland (30%).

**Accommodation Location by Travel Party Type**

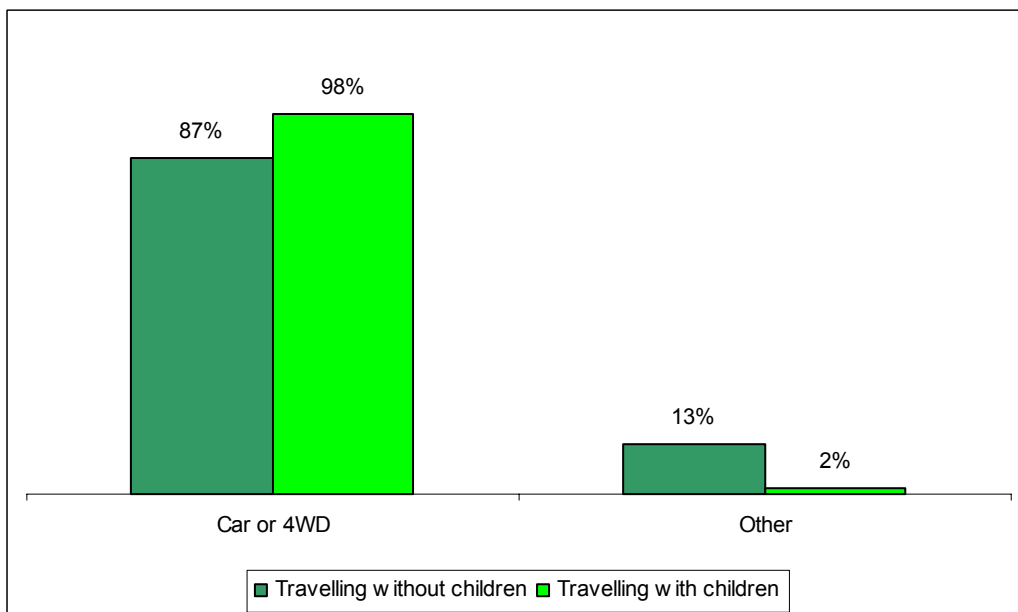


Base = Overnight Visitors Only (n=264)

### 5.2.6 Form of Transportation

Irrespective of travel party type, most respondents travelled the last leg of their journey to Caloundra by car or four-wheel drive.

**Transport by Travel Party Type**



## 5.2.7 Activities

People travelling to the Caloundra region with children were more likely to go shopping, swim at the beach, go bodysurfing/surfing, go to the cinema, go fishing and go on a daytrip to Mooloolaba than people travelling without children. In contrast, people travelling to the region without children were more likely to visit Mary Cairncross Park, visit a national park, visit an art or craft gallery, visit a national park and visit the Glasshouse Mountains than people travelling with children.

### Activities Participated In by Travel Party Type

Activity	Overall (N=403)	Travelling without children	Travelling with children	Max Diff*
Go to a cafe/coffee shop	69%	68%	71%	3%
Go on a scenic drive	64%	66%	63%	3%
Swimming at the beach	61%	48%	74%	26%
Eat at a restaurant	54%	54%	54%	0%
Go on a daytrip to the Hinterland	53%	56%	51%	5%
Shopping at Caloundra Town Centre	51%	39%	64%	25%
Visit markets	41%	39%	43%	4%
Visit friends or relatives	41%	39%	43%	5%
Visit an art or craft gallery	39%	45%	31%	14%
Shopping at Sunland Shopping Centre	38%	24%	54%	31%
Go on a daytrip to Mooloolaba	36%	29%	43%	13%
Visit Mary Cairncross Park	33%	43%	23%	19%
Bodysurfing/surfing	29%	17%	43%	26%
Visit the Glasshouse Mountains	27%	33%	21%	13%
Go to the cinema	24%	15%	34%	19%
Go on a daytrip to Noosa	24%	23%	25%	3%
Shopping at Kawana Shopping World	23%	17%	29%	12%
Visit a national park	22%	29%	14%	15%
Visit Australia Zoo	20%	17%	23%	6%
Go fishing	19%	12%	26%	14%
Visit a winery	13%	17%	8%	9%
Visit a museum	9%	11%	6%	4%
Visit the Ettamogah Pub	9%	10%	7%	3%
Play golf	7%	5%	9%	4%
Visit Aussie World	6%	5%	6%	1%
Other water sports	5%	2%	8%	5%
Go on a boat or cruise	5%	4%	6%	1%
Visit the Big Kart Track	5%	2%	8%	6%
Kayaking	3%	2%	4%	2%
Jet skiing	3%	3%	2%	1%
Horse riding	2%	2%	3%	1%
Sailing	2%	1%	3%	2%
Go on a scenic flight	2%	3%	1%	2%
Go skydiving	2%	2%	1%	1%
Other activities	17%	21%	12%	10%

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

■ = Top 5 for each sub group.

NB - Responses are shown only for those activities listed in the questionnaire

### 5.3 Opinions and Satisfaction

#### 5.3.1 Appealing Aspects

People travelling with children found aspects such as the beach (38%) and the family orientated environment (19%) more appealing than people travelling without children. In contrast, people travelling without children found aspects such as the scenery/landscape (30%), the weather (13%) and the Hinterland/mountains (21%) more appealing than people travelling with children.

**Most Appealing Aspects by Travel Party Type**

Appealing Aspect	Overall (N=403)	Travelling without children	Travelling with children	Max Diff*
Beaches/water/coast	33%	29%	38%	9%
Scenery/landscape/natural environment	23%	30%	15%	15%
Hinterland/mountains	16%	21%	11%	10%
Relaxed/relaxing/casual	15%	12%	18%	6%
Family orientated/family facilities	11%	4%	19%	14%
Weather/climate	9%	13%	4%	9%
Quiet/peaceful/not overcrowded	9%	8%	10%	2%
Atmosphere	8%	8%	7%	1%
Not too developed or commercialised	8%	7%	9%	2%
Lifestyle	7%	9%	6%	3%
Friendliness/helpfulness of locals	7%	9%	5%	3%
Parks/rainforest/bushland/greenery	7%	8%	6%	2%
Convenient location/easy access	6%	4%	8%	4%
Range of attractions/activities/facilities	6%	6%	6%	0%
Cleanliness of area	5%	7%	4%	4%
Other	24%	24%	23%	1%

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

### 5.3.2 Possible Improvements

People travelling with children are more likely to mention that they would like to see more or improved public facilities and amenities (15%) than those travelling to the region without children (5%).

#### Possible Improvements by Travel Party Type

Improvement Category	Overall (N=403)	Travelling without children	Travelling with children	Max Diff*
Restrict development	14%	15%	13%	2%
Improved/more public facilities/amenities	10%	5%	15%	10%
Improved/more parking	8%	6%	9%	3%
Improved/more restaurants and cafes	6%	4%	8%	4%
Maintenance/cleanliness of town and public areas	3%	2%	4%	2%
More tourist information	3%	2%	4%	1%
Improved/more signage	3%	3%	3%	0%
Improve traffic flow/roads	3%	3%	2%	1%
More/improved shops	3%	3%	4%	1%
Improved/more public transport	2%	2%	2%	1%
Other	13%	13%	13%	1%

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

### 5.3.3 Visitor Satisfaction

People travelling without children rate the following aspects lower than people travelling with children: availability of public transport, the Caloundra streetscape, the current level of development and accommodation value for money. People travelling with children rate the following aspects lower than people travelling without children: attractions overall, service at attractions, attractions value for money, restaurant/café range, range of attractions and quality of attractions.

**Mean Satisfaction with Aspects of Caloundra by Travel Party Type**

Aspects of Caloundra	Overall (N=403)	Travelling without children	Travelling with children	Max Diff*
Friendliness of locals	4.55	4.59	4.50	0.09
Weather during your visit	4.49	4.48	4.48	0.00
Cleanliness of beaches	4.43	4.37	4.46	0.09
Quality of beaches	4.42	4.39	4.45	0.06
Lots to see and do	4.41	4.46	4.36	0.09
Beaches overall	4.41	4.39	4.42	0.02
Personal safety and security	4.34	4.40	4.28	0.12
Accommodation range	4.34	4.33	4.37	0.04
National parks	4.34	4.32	4.35	0.02
Availability of tourist information	4.29	4.28	4.30	0.02
Access/transport to Caloundra	4.27	4.23	4.31	0.08
Locals' knowledge about Caloundra	4.22	4.20	4.23	0.04
Beach facilities	4.19	4.20	4.18	0.02
Attractions range	4.17	4.27	4.10	0.17
Accommodation quality	4.17	4.15	4.19	0.04
Accommodation overall	4.16	4.11	4.20	0.09
Availability of tours	4.16	4.10	4.21	0.11
Restaurant/café range	4.15	4.23	4.06	0.17
Accommodation service	4.14	4.10	4.17	0.07
Attractions overall	4.11	4.22	4.01	0.20
Attractions service	4.11	4.21	4.02	0.20
Shopping range	4.11	4.17	4.04	0.12
Shopping service	4.09	4.08	4.10	0.02
Restaurant/café atmosphere	4.09	4.13	4.05	0.08
Attractions quality	4.07	4.14	4.01	0.14
Restaurants/cafes overall	4.06	4.10	4.02	0.08
Shopping overall	4.06	4.05	4.06	0.01
Accommodation availability	4.03	4.02	4.04	0.02
Accommodation value for money	4.03	3.97	4.10	0.13
Restaurant/café service	4.02	4.07	3.97	0.10
Caloundra streetscape	4.02	3.94	4.09	0.15
Shopping quality of goods	4.01	3.98	4.04	0.06
Restaurant/café quality of food	4.00	4.01	3.99	0.03
Signage	3.99	3.98	4.01	0.03
Restaurant/café value for money	3.99	4.01	3.97	0.04
Shopping value for money	3.94	3.88	3.97	0.09
Attractions value for money	3.90	4.02	3.82	0.19
Car park facilities	3.84	3.87	3.82	0.05
Current level of development	3.71	3.64	3.78	0.15
Nightlife/entertainment	3.55	3.51	3.58	0.07
Availability of public transport	3.54	3.38	3.80	0.42
<b>Overall Satisfaction</b>	<b>4.39</b>	<b>4.39</b>	<b>4.39</b>	<b>0.00</b>

Scale: 1 = Very Dissatisfied; 5 = Very Satisfied

■ = Top 5 for each sub group.

\*Max. Diff shows the difference between the highest and the lowest mean scores across the sub-groups.

## 6 Differences by Origin

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

Sub-group	Sample Size
Intrastate visitors	281
Interstate visitors	85
<b>TOTAL</b>	<b>366</b>

Respondents from “Overseas” have not been included in this section due to the small sample size in this group.

### 6.1 Opinions and Satisfaction

#### 6.1.1 Appealing Aspects

Interstate respondents were more likely than intrastate respondents to find the lifestyle (16%), weather (15%) and scenery or landscape (27%) appealing in the Caloundra region. In contrast, intrastate respondents found aspects such as the beaches (36%) and the family orientated environment (14%) more appealing than their interstate counterparts.

#### Most Appealing Aspects by Origin

Appealing Aspect	Overall (N=403)	Intrastate visitor	Interstate visitor	Max Diff*
Beaches/water/coast	33%	36%	28%	8%
Scenery/landscape/natural environment	23%	19%	27%	8%
Hinterland/mountains	16%	16%	19%	3%
Relaxed/relaxing/casual	15%	16%	16%	1%
Family orientated/family facilities	11%	14%	6%	8%
Weather/climate	9%	6%	15%	9%
Quiet/peaceful/not overcrowded	9%	10%	6%	4%
Atmosphere	8%	8%	8%	0%
Not too developed or commercialised	8%	9%	4%	6%
Lifestyle	7%	5%	16%	11%
Friendliness/helpfulness of locals	7%	5%	9%	4%
Parks/rainforest/bushland/greenery	7%	6%	11%	5%
Convenient location/easy access	6%	7%	4%	4%
Range of attractions/activities/facilities	6%	6%	6%	0%
Cleanliness of area	5%	5%	6%	1%
Other	24%	25%	18%	7%

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

## 6.1.2 Possible Improvements

Intrastate visitors were more likely than interstate visitors to mention that they would like to see more or improved public facilities and amenities (12%). Improved or more signage was mentioned more frequently by interstate visitors (7%).

### Possible Improvements by Origin

Improvement Category	Overall (N=403)	Intrastate visitor	Interstate visitor	Max Diff*
Restrict development	14%	13%	15%	2%
Improved/more public facilities/amenities	10%	12%	5%	7%
Improved/more parking	8%	9%	7%	2%
Improved/more restaurants and cafes	6%	7%	4%	3%
More/improved shops	3%	4%	5%	1%
Maintenance/cleanliness of town and public areas	3%	4%	0%	4%
Improved/more signage	3%	2%	7%	5%
More tourist information	3%	2%	5%	2%
Improve traffic flow/roads	3%	3%	2%	1%
Improved/more public transport	2%	2%	2%	0%
Other	13%	13%	12%	1%

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

### 6.1.3 Visitor Satisfaction

On average, interstate respondents gave higher satisfaction ratings for individual aspects of the Caloundra region than their interstate counterparts and had higher satisfaction overall.

#### Mean Satisfaction with Aspects of Caloundra by Origin

Aspects of Caloundra	Overall (N=403)	Intrastate visitor	Interstate visitor	Max Diff*
Friendliness of locals	4.55	4.53	4.55	0.01
Weather during your visit	4.48	4.47	4.43	0.03
Cleanliness of beaches	4.42	4.39	4.52	0.13
Quality of beaches	4.42	4.39	4.49	0.10
Lots to see and do	4.41	4.37	4.53	0.16
Beaches overall	4.41	4.35	4.58	0.23
Personal safety and security	4.34	4.32	4.38	0.06
Accommodation range	4.34	4.35	4.33	0.01
National parks	4.34	4.35	4.24	0.12
Availability of tourist information	4.29	4.22	4.45	0.23
Access/transport to Caloundra	4.27	4.22	4.43	0.21
Locals' knowledge about Caloundra	4.22	4.24	4.17	0.07
Beach facilities	4.18	4.12	4.42	0.31
Attractions range	4.17	4.11	4.39	0.29
Accommodation quality	4.17	4.20	4.05	0.15
Accommodation overall	4.16	4.18	4.05	0.13
Availability of tours	4.16	4.03	4.39	0.36
Restaurant/cafe range	4.15	4.12	4.20	0.08
Accommodation service	4.14	4.12	4.15	0.03
Attractions overall	4.11	4.03	4.26	0.24
Attractions service	4.11	4.03	4.23	0.20
Shopping range	4.11	4.05	4.31	0.26
Shopping service	4.09	4.04	4.19	0.15
Restaurant/cafe atmosphere	4.09	4.05	4.25	0.19
Attractions quality	4.07	4.02	4.15	0.14
Restaurants/cafes overall	4.06	4.00	4.22	0.22
Shopping overall	4.06	3.99	4.23	0.24
Accommodation availability	4.03	4.03	3.95	0.08
Accommodation value for money	4.03	4.05	4.02	0.03
Restaurant/cafe service	4.02	3.96	4.13	0.17
Caloundra streetscape	4.01	3.91	4.36	0.45
Shopping quality of goods	4.01	4.00	4.06	0.07
Restaurant/cafe quality of food	4.00	3.98	4.02	0.03
Restaurant/cafe value for money	3.99	3.96	4.03	0.07
Signage	3.99	3.98	3.99	0.01
Shopping value for money	3.94	3.91	4.02	0.11
Attractions value for money	3.90	3.86	3.98	0.12
Car park facilities	3.84	3.82	3.89	0.07
Current level of development	3.71	3.72	3.65	0.06
Nightlife/entertainment	3.55	3.56	3.45	0.11
Availability of public transport	3.54	3.52	3.50	0.02
Overall Satisfaction	4.39	4.38	4.42	0.04

Scale: 1= Very Dissatisfied; 5= Very Satisfied

■ = Top 5 for each sub group.

\*Max. Diff shows the difference between the highest and the lowest mean scores across the sub-groups.

## 7 Differences by Repeat Visitation

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

Sub-group	Sample Size*
First time visitor	79
Repeat visitor	323
<b>TOTAL</b>	<b>402</b>

\*1 missing case

**NB – It is important to note that “repeat visitors” refers to people who have visited Caloundra at least one other time in the last three years and “first-time visitors” refers to people who are on their only visit to Caloundra in the last few years. “First time visitors” may or may not have visited Caloundra more than three years ago.**

### 7.1 Opinions and Satisfaction

#### 7.1.1 Appealing Aspects

Repeat visitors found aspects such as the beaches (35%) and the family orientated environment (13%) more appealing than first time visitors. In contrast, people on their first to the region found aspects such as the scenery/landscape (33%) more appealing than people who had visited the region before.

#### Most Appealing Aspects by Repeat Visitation

Appealing Aspect	Overall (N=403)	First time visitor	Repeat Visitor	Max Diff*
Beaches/water/coast	33%	25%	35%	9%
Scenery/landscape/natural environment	23%	33%	21%	12%
Hinterland/mountains	16%	18%	16%	2%
Relaxed/relaxing/casual	15%	10%	16%	6%
Family orientated/family facilities	11%	3%	13%	11%
Weather/climate	9%	13%	8%	5%
Quiet/peaceful/not overcrowded	9%	6%	9%	3%
Atmosphere	8%	9%	8%	1%
Not too developed or commercialised	8%	3%	9%	6%
Lifestyle	7%	11%	7%	5%
Friendliness/helpfulness of locals	7%	10%	7%	4%
Parks/rainforest/bushland/greenery	7%	10%	6%	4%
Convenient location/easy access	6%	1%	7%	6%
Range of attractions/activities/facilities	6%	5%	7%	1%
Cleanliness of area	5%	3%	6%	4%
Other	23%	22%	24%	2%

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

## 7.1.2 Possible Improvements

Repeat visitors were more likely to mention that they would like to see more or improved public facilities and amenities in the Caloundra region.

### Possible Improvements by Repeat Visitation

Improvement Category	Overall (N=403)	First time visitor	Repeat Visitor	Max Diff*
Restrict development	14%	18%	13%	5%
Improved/more public facilities/amenities	10%	4%	11%	7%
Improved/more parking	7%	3%	9%	6%
Improved/more restaurants and cafes	6%	1%	7%	6%
More/improved shops	3%	0%	4%	4%
Maintenance/cleanliness of town and public areas	3%	0%	4%	4%
Improved/more signage	3%	6%	2%	4%
More tourist information	3%	4%	3%	1%
Improve traffic flow/roads	3%	1%	3%	2%
Improved/more public transport	2%	1%	2%	1%
Other	13%	8%	14%	7%

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

### 7.1.3 Visitor Satisfaction

First time visitors rated the following aspects lower than repeat visitors: accommodation value for money, accommodation quality, signage, accommodation overall and accommodation service. Repeat visitors rated the following aspects lower than first time visitors: service at attractions, availability of tours, availability of tourist information, attractions overall and car park facilities.

**Mean Satisfaction with Aspects of Caloundra by Repeat Visitation**

	Overall (N=403)	First time visitor	Repeat visitor	Max Diff*
Friendliness of locals	4.6	4.6	4.5	0.0
Weather during your visit	4.5	4.4	4.5	0.0
Cleanliness of beaches	4.4	4.5	4.4	0.1
Quality of beaches	4.4	4.3	4.4	0.1
Lots to see and do	4.4	4.4	4.4	0.0
Beaches overall	4.4	4.4	4.4	0.0
Personal safety and security	4.3	4.4	4.3	0.0
Accommodation range	4.3	4.2	4.4	0.1
National parks	4.3	4.3	4.3	0.0
Availability of tourist information	4.3	4.5	4.2	0.3
Access/transport to Caloundra	4.3	4.3	4.3	0.0
Locals' knowledge about Caloundra	4.2	4.2	4.2	0.1
Beach facilities	4.2	4.3	4.2	0.1
Attractions - range	4.2	4.2	4.2	0.1
Accommodation quality	4.2	3.9	4.2	0.3
Accommodation overall	4.2	4.0	4.2	0.2
Availability of tours	4.2	4.4	4.1	0.3
Restaurant/cafe range	4.1	4.2	4.1	0.1
Accommodation service	4.1	4.0	4.2	0.2
Attractions - overall	4.1	4.3	4.1	0.2
Attractions - service	4.1	4.4	4.1	0.3
Shopping range	4.1	4.1	4.1	0.0
Shopping service	4.1	4.1	4.1	0.0
Restaurant/cafe atmosphere	4.1	4.1	4.1	0.0
Attractions - quality	4.1	4.2	4.1	0.1
Restaurant/cafe overall	4.1	4.1	4.0	0.1
Shopping overall	4.1	4.2	4.0	0.1
Accommodation availability	4.0	4.0	4.0	0.1
Accommodation value for money	4.0	3.8	4.1	0.3
Restaurant/cafe service	4.0	4.1	4.0	0.1
Caloundra streetscape	4.0	4.1	4.0	0.1
Shopping quality of goods	4.0	4.0	4.0	0.1
Restaurant/cafe quality of food	4.0	4.0	4.0	0.0
Signage	4.0	3.8	4.0	0.2
Restaurant/cafe value for money	4.0	3.9	4.0	0.1
Shopping value for money	3.9	3.9	3.9	0.1
Attractions - value for money	3.9	4.0	3.9	0.1
Car park facilities	3.8	4.0	3.8	0.2
Current level of development	3.7	3.8	3.7	0.1
Nightlife/entertainment	3.5	3.6	3.5	0.1
Availability of public transport	3.5	3.5	3.5	0.0
Overall Satisfaction	4.4	4.5	4.4	0.1

Scale: 1= Very Dissatisfied; 5= Very Satisfied

■ = Top 5 for each sub group

\*Max. Diff shows the difference between the highest and the lowest mean scores across the sub-groups.

**NB – This table shows only one decimal place due to the small sample in the “first time visitors” category**

## 8 Key Findings - Overall

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

### 8.1 Visitor Details

The majority of respondents were from intrastate (70%), with 33% from Brisbane and 37% from Queensland regions (excluding Brisbane). A further 12% of respondents were from New South Wales, while the overseas market represented 9% of respondents. Visitors from Victoria and other states of Australia represent only a small proportion of respondents (5% and 4%, respectively).

A range of ages was represented within the sample group, with half (51%) being under 45 years of age and half (49%) being 45 years or over.

Almost two-thirds of respondents (59%) have an annual household income of \$80,000 or less.

### 8.2 Details of the Visit

Most respondents had visited the region before, with over three-quarters having visited Caloundra at least one other time in the previous three years (76%).

The majority of respondents were visiting for a holiday (52%), or for leisure/recreation purposes (25%). A small proportion of respondents travelled to Caloundra to visit friends or relatives (VFR) (16%).

A large proportion of respondents travelled as a group of friends or family with children on their visit to Caloundra (48%). Almost one-third of respondents travelled as an adult couple (30%).

Word of mouth was the most popular source of information used by respondents when planning their trip to the Caloundra region (40%), followed by existing knowledge of the area (22%).

Thirty-four percent (34%) of those interviewed were on a daytrip to the Caloundra region and 66% were staying overnight.

Most of the daytrip respondents travelled to the Caloundra region from Brisbane City (37%). A significant proportion of those who were on a daytrip also travelled from other areas of the Sunshine Coast, with 26% from the Maroochy Shire and 5% from the Noosa Shire.

Of those who were staying overnight, the majority were spending five or more nights in the region (68%), with 39% spending eight or more nights and 29% spending between five and seven nights.

Rented apartments/holiday flats are the most popular form of accommodation, with 42% of those who stayed overnight utilising this type of accommodation. Staying in the home of a friend or relative also accounted for a large proportion of respondents (25%).

Most of the overnight respondents were staying in Caloundra City (53%). A further 19% were staying in the Hinterland region (i.e. Maleny and Beerwah/Landsborough).

Ninety-two percent (92%) of respondents used a car or four-wheel drive on the last leg of their journey to Caloundra.

The Sunshine Coast Hinterland and Mooloolaba were visited by an equal proportion of respondents (55% and 54%, respectively). A further one-third of respondents (36%) had already visited or were intending to visit Noosa on their current trip.

The most popular activities participated in by respondents were going to a café/coffee shop (69%), going on a scenic drive (64%), swimming at the beach (61%), eating at a restaurant (54%), going on a daytrip to the Hinterland (53%) and shopping at Caloundra Town Centre (51%).

### **8.3 Opinions and Satisfaction**

The beaches/water/coast (33%) and the scenery/landscape/natural environment (23%) were identified by respondents as the most appealing aspects of Caloundra.

When asked for possible improvements to the area, 14% of respondents explicitly stated that they would like to development in the region restricted. The most popular improvement suggested was to improve or provide more public facilities/amenities (10%).

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 friendliness of locals (4.55), weather during the visit (4.49), the cleanliness of beaches (4.43), the quality of beaches (4.42) and lots to see and do (4.41). The bottom five mean ratings received were for the availability of public transport (3.54), nightlife/entertainment (3.55), the current level of development (3.71), car park facilities (3.84) and value for money at attractions (3.90).