

CALOUNDRA VISITOR SURVEY



FINAL REPORT MARCH 2005



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INTRODUCTION

The Caloundra Visitor Survey was undertaken by the Tourism Queensland Research Department, in association with Caloundra Tourism and Tourism Sunshine Coast. It is envisaged that this report will assist in developing a better understanding of the existing Caloundra tourism market.

The overall outcome of the research is to help guide the development of the Caloundra area. It is anticipated that information gathered from this research will be used by Tourism Queensland, Tourism Sunshine Coast, Caloundra Tourism, 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 with specific aspects of Caloundra;
- to determine improvements that could be made in Caloundra to increase visitor satisfaction;
- to determine what motivates people to visit Caloundra; and
- to identify any difference in the profile and opinions of visitors over time.

This report presents the findings of the January 2005 Caloundra Visitor Survey, the fifth wave of the survey, and the third January wave of the survey.

KEY RESULTS

Details of the Visit

The majority of respondents cited holiday/leisure as the main purpose for their trip to Caloundra (79%). The majority of daytrip and overnight visitors were visiting Caloundra for the purpose of a holiday (71% and 82% respectively). Similarly, 88% of people travelling with children were travelling for holiday or leisure purposes and 67% of people travelling with children were visiting for holiday/leisure.

Eighty-four percent (84%) of respondents had visited the region before. The majority of daytrip and overnight visitors were on a return visit to Caloundra (89% and 84% respectively). Eighty-nine percent (89%) of visitors travelling with children were repeat visitors, as were 78% of those travelling without children. There has been a slight increase over time of visitors who have been to Caloundra four times or more (from 46% in 2003 to 54% in 2005).

Two thirds of respondents did not use any information sources when planning their trip to Caloundra, as they had prior knowledge of the region (62%). Eighty-four percent (84%) of daytrip visitors used their prior knowledge of the region when planning their trip, as did more than half of the overnight visitors (56%). The majority of people travelling with and without children used their prior knowledge of the region when planning their trip (65% and 60% respectively). The most common information sources utilised by all respondents were word of mouth (19%), and the internet (14%).

Over three quarters of respondents were on an overnight visit to Caloundra (77%), with almost one third of visitors staying for two weeks or longer (31%). A further forty-two percent (42%) of respondents were staying in Caloundra for between five and 13 nights. Since January 2003, there has been an increase in the proportion of overnight visitors staying for more than one week in the Caloundra region (from 39% in 2003 to 48% in 2005).

More than one third of respondents recalled seeing advertising for the Caloundra region prior to leaving home (36%). Sixty-four percent (64%) and 58% of day-trippers and overnight visitors had not seen advertising for the Caloundra region prior to leaving home, respectively. There has been a steady increase in the proportion of people who could recall seeing advertising for Caloundra since January 2003 (from 27% in 2003 to 36% in 2004). One fifth of all respondents recalled seeing advertising for the Caloundra region on television (22%), and 10% recalled seeing advertising in press advertising (excluding magazines). One in ten respondents recalled hearing the Caloundra slogan 'Lazy days, play days, everyday' in January 2005. Since January 2003 there has been an increase in the proportion of visitors recalling seeing television advertisements for the Caloundra region (up from 13% in 2003 to 22% in 2005).

One third of overnight visitors stayed in a rented apartment or holiday flat while visiting Caloundra (35%). A further 27% of overnight visitors stayed with a friend or relative, 15% stayed in a caravan, cabin or tent, and 13% stayed at a hotel or resort. Forty-one percent (41%) of people travelling with children stayed in a rented apartment or holiday flat and 31% of people travelling without children stayed at a friend or relatives property. In January 2005, a greater proportion of visitors used caravan/cabin/tents or hotel/resorts as accommodation while staying in Caloundra, compared to previous years.

The greatest proportion of overnight visitors staying in commercial accommodation booked directly before leaving home (25%), or booked directly with the accommodation provider as they had stayed there before (23%). One in five overnight respondents staying in commercial accommodation used the internet to find their accommodation (20%), and equal proportions of respondents booking online or phoning to make the booking (10% each). One third of people travelling without children booked directly with their accommodation before leaving home (30%) and one quarter of people travelling with children booked direct with the accommodation as they had stayed there before (25%). Two thirds of overnight respondents were staying in Caloundra (62%), with one in five staying at Golden Beach (20%). Sixty-six percent (66%) of visitors travelling with children were staying in Caloundra as were 55% of people travelling without children.

The greatest proportion of visitors to Caloundra used their own/friends/relatives vehicle to travel to Caloundra (83%). One in ten respondents used air transport on their journey to Caloundra (12%), with three quarters of those visitors flying into Brisbane airport and the remainder flying into Sunshine Coast Airport. Ninety-four percent (94%) of day trip visitors used their own/friends/relatives vehicle to get to Caloundra, as did 80% of overnight visitors. Ninety percent (90%) of people travelling with children used their own/friends/relative vehicle on their journey to Caloundra as did three quarters of people travelling without children (72%).

KEY RESULTS

Details of the Visit (Continued)

Forty-three percent (43%) of visitors to Caloundra had visited or planned to visit Maroochydore during their trip to Caloundra, while 38% visited or planned to visit Mooloolaba. Approximately one in four respondents had visited or planned to visit Noosa, the Sunshine Coast Hinterland and Eumundi (24%, 24%, and 23% respectively). Over half of all overnight visitors to Caloundra visited Maroochydore (51%) and 46% visited Mooloolaba. Fifteen percent (15%) of daytrip visitors to Caloundra visited Maroochydore, and 13% visited Noosa. The most popular places to visit for people travelling without children were Maroochydore (46%) Mooloolaba (40%), and Noosa (32%). The most popular places visited by people travelling with children were Maroochydore (42%), Mooloolaba (36%) and the Sunshine Coast Hinterland (23%).

The most popular activities participated in by visitors to Caloundra were going to the beach (95%), going on a walk (76%), going to a café/coffee shop (70%), going shopping (66%), and participating in water sports (62%). The most popular activities undertaken by daytrip visitors were going to the beach (88%), going to a café/coffee shop (63%), and participating in water sports (55%). The most popular activities undertaken by overnight visitors were going to the beach (98%), going on a walk (83%), and going shopping (76%). The majority of people travelling both with and without children went to the beach (96% and 95% respectively), went on a walk (74% and 80% respectively), and went to a café/coffee shop (67% and 74% respectively). Sixty-seven (67%) percent of people travelling without children went shopping and 63% of people travelling with children participated in water sports.

The most common motivations for taking the trip to Caloundra were to relax and rejuvenate, to take a family holiday and to spend time with one's partner. These motivation was also in the top three for both day trip and overnight visitors. The top three motivations for visitors travelling with children were to take a family holiday, to relax and rejuvenate, and to spend time with their partner. The top three motivations for visitors travelling without children were to relax and rejuvenate, to enjoy the peace and quiet of an uncrowded destination and to spend time with their partner. The majority of respondents indicated that their greatest motivation for travelling to Caloundra had been fulfilled (89%), with 1% stating their motivation for travelling to Caloundra had not been fulfilled.

Eighty-three percent (83%) of respondents intend to return to Caloundra for a holiday within the next three years. Three quarters of day tip visitors plan to return to Caloundra for a holiday within the next three years (76%), while 85% of overnight visitors plan to return within the next three years. Similarly, 85% of people travelling with children plan to return to Caloundra within the next three years, as do 80% of people travelling without children.

Opinions and Satisfactions

The most commonly suggested improvement respondents would like made to Caloundra is to improve or provide more parking (15%). More, improved or cheaper restaurants and cafes, less or restricted development and commercialisation, and improved or more shops were each mentioned by 7% of respondents. The most commonly suggest improvement for day trip and overnight visitors was for improved or more parking (16% and 14% respectively). Improved/more parking was the improvement most often suggest by people travelling with children (14% and without children (16%). Restricting development in Caloundra and improving/providing more parking have been in the top three mentioned improvements by visitors since the first wave of the survey in January 2003.

The majority of respondents were either satisfied or very satisfied with their overall experiences in Caloundra, (94%, the remaining 6% stating their satisfaction was neutral). The top five mean satisfaction ratings for the Caloundra region were for the beaches, the range of accommodation, friendliness of the locals, personal safety/security and lots to see and do. The bottom five mean ratings of satisfaction for the Caloundra region are for the nightlife and entertainment, the availability of public transport, car park facilities, the value for money of attractions and the value for money of shopping. Consistent declines in satisfaction between January 2003 and January 2005 were noted with the following aspects of Caloundra: nightlife/entertainment, restaurant/café atmosphere, restaurant café range, availability of tours, shopping overall, weather, National Parks and friendliness of the locals. In contrast, satisfaction with Caloundra beaches has increased between January 2003 and January 2005.

KEY RESULTS

Respondent Profile

Half of the respondents originated from Brisbane (51%), with a further 23% originating from other regions of Queensland. Nine percent (9%) of respondents travelled from New South Wales and overseas respondents accounted for 7% of all respondents. Seventy percent (70%) of daytrip visitors were from Brisbane, and a further 21% were from other areas of Queensland. Almost half of the respondents staying in Caloundra overnight were from Brisbane (45%), and 22% were from other areas of Queensland. More than half of those travelling with children were from Brisbane (56%), with a further 16% originating from other areas of South East Queensland. Forty-one percent (41%) of people travelling without children originated from Brisbane, with a further 19% travelling from other areas of South East Queensland. Since January 2003, the proportion of visitors coming to Caloundra from Brisbane has increased (up from 44% in 2003 to 51% in 2005).

One third of respondents were aged between 35 and 44 years (34%), and a further 26% were aged between 45 and 54 years. Thirty-five percent (35%) of day-trippers were aged between 35 and 44 years, as were a similar proportion of overnight visitors (33%). Three quarters (75%) of the visitors travelling with children were aged between 35 and 54, while one quarter of people travelling without children were aged 25 to 34 years (25%). There has been an increase in the proportion of visitors aged between 35 and 54 years of age since January 2003 (from 50% in 2003 to 60% in 2005). Conversely, the proportion of visitors aged between 55 and 64 years has declined from 17% in 2003 to 11% in 2005.

Sixty-one percent (61%) of respondents had an annual household income of below \$80,000, while one quarter of respondents had an annual household income of \$100,000 or greater (24%). Seventy-nine percent (79%) of people travelling without children had a household income below \$80,000. Half of those travelling with children had a household income of \$80,000 or more (49%).

Over half of the respondents travelled to Caloundra as a family group (55%), and one quarter of respondents travelled as an adult couple (23%). The majority of both daytrip and overnight visitors were travelling as either a family group (49% and 57% respectively) or as an adult couple (25% and 22% respectively). Since January 2003 there has been an increase in the proportion of visitors travelling as a family group (parents and children, 42% in 2003 to 55% in 2005) and a decrease in the proportion of visitors travelling to the Caloundra region with no children in the travel party (52% in 2003 to 46% in 2005).

METHODOLOGY

Throughout this report "Caloundra" refers to the Caloundra City Council area, which includes Beerburrum, Beerwah, Caloundra, Conondale, Currimundi, the Glasshouse Mountains, Golden Beach/Pelican Waters, Kawana, Landsborough, Maleny, Minyama, Mooloolah and Witta.

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, improvements, motivations and satisfaction.

Interviewing for the January 2005 wave was conducted from Wednesday 05 January until Tuesday 18 January 2005, coinciding with the region's peak visitation period, the Australian summer school holidays. In total, 349 surveys were completed. Community Solutions was commissioned to undertake the interviews and trained by Tourism Queensland staff. The results of the January 2005 wave are presented in isolation, and also in relation to the results of previous waves of the survey conducted in 2004 and 2003

The survey period for the January 2003 wave ran from 08 January to 21 January 2003, coinciding with the Australian school summer holidays. In total, 403 surveys were completed for the January 2003 wave. Volunteers were utilised to undertake the interviews and trained by Tourism Queensland staff.

The survey period for the January 2004 wave ran from 10 January to 26 January 2004. The interview period for the January 2004 wave coincided with Australian school summer holidays. A total of 421 surveys were completed. Oaki Doaki Business Consultants was commissioned to undertake the interviews and trained by Tourism Queensland staff.

Interviewers recruited respondents by randomly intercepting passers-by at various locations around Caloundra. Residents of the Caloundra region were excluded from participating in the research. The locations of interviewing and the proportion of interviews completed at each location are as follows:

TABLE 1 – LOCATION AND PROPORTION OF INTERVIEWS COMPLETED

Interview Location	January 2003	January 2004	January 2005
Bulcock Beach	10%	7%	28%
Dicky Beach	-	-	21%
Kings Beach	24%	23%	21%
Golden Beach	-	-	12%
Moffat Beach	-	5%	11%
Bulcock Street	21%	10%	5%
Location Unspecified		-	1%
Maple Street	10%	9%	-
Mary Cairncross Park	19%	32%	-
Caloundra	-	3%	<1%
Currimundi	2%	-	-
Maleny	15%	11%	-
TOTAL	100%	100%	100%

METHODOLOGY (Continued)

Data from all completed questionnaires was entered into a database and prepared for analysis. Analysis was undertaken using SPSS statistical analysis software. The results are presented in tables and graphs, supplemented with written comment and interpretation. 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.

Certain questions within the survey were analysed by cross-tabulation (or by means comparison for scaled questions) to find any notable differences between different groups of respondents. The **sub-groups** of particular interest for this research are determined by visitors' **length of stay, travel party** and **by 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.

Please 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.

TOPLINE RESULTS

DETAILS OF THE VISIT ⁽¹⁾

Main Purpose ⁽²⁾

Respondents were asked about the main purpose for their trip to Caloundra. The greatest proportion of visitors travelled to Caloundra for holiday/leisure (79%). A smaller proportion of respondents travelled to Caloundra to visit friends or relatives (16%).

Previous Visitation

The majority of visitors had been to Caloundra before, with approximately one third of respondents having visited between one and three times before (30%), and more than half having been to the area four or more times in the past three years (54%). Fifteen percent (15%) of visitors were visiting Caloundra for the first time.

Information Sources ^{(2) (3)}

Respondents were asked about the information sources they used when planning their trip to Caloundra. The greatest proportion of respondents did not use any information sources as they had prior knowledge of the region (62%).

The most common source of information respondents utilised was word of mouth, which was utilised by one in five respondents (19%). Another common information source utilised was the internet (14%).

Length of Stay

The majority of respondents stayed overnight in Caloundra (77%), while about one in four respondents travelled for a daytrip (23%).

Overnight visitors were asked how many nights they were spending in Caloundra. Length of stay was relatively long with approximately one third of overnight visitors staying for two weeks or more (31%), and nearly three quarters staying for five or more nights (73%). ⁽⁴⁾

FIGURE 1 – MAIN PURPOSE

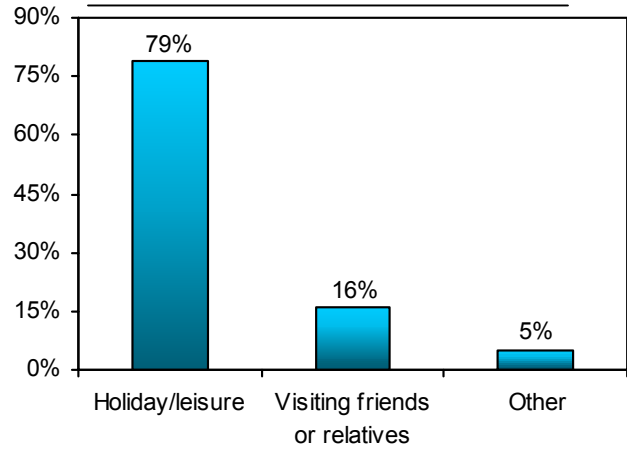


FIGURE 2 – INFORMATION SOURCES

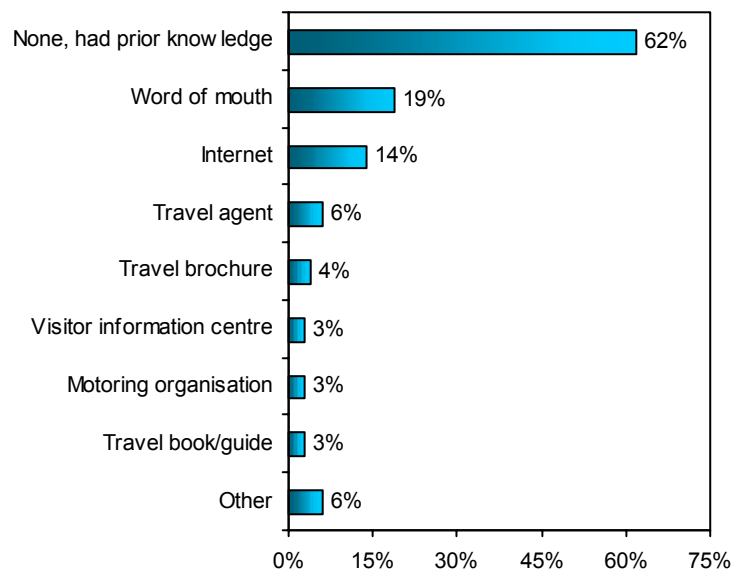
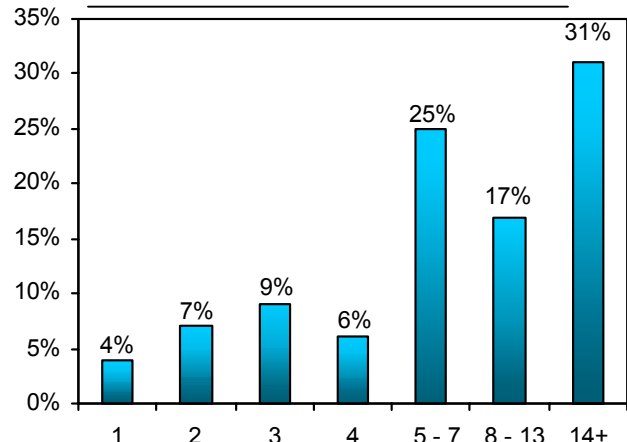


FIGURE 3 – LENGTH OF STAY (NIGHTS)



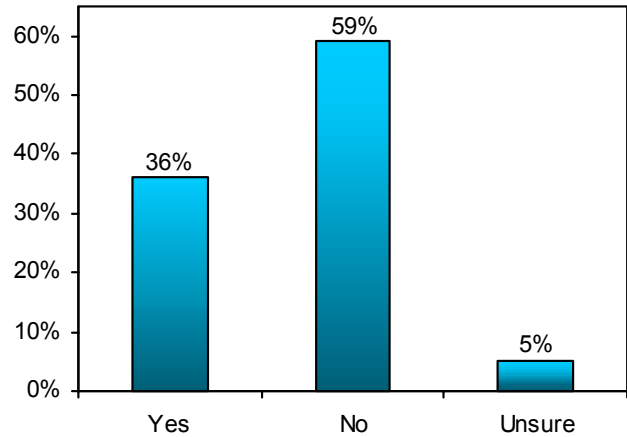
1. Base: All respondents
 2. 'Other' consists of a range of purposes each mentioned by fewer than 3% of respondents
 3. Multiple responses accepted
 4. Base: Overnight visitors (n=268)

DETAILS OF THE VISIT ⁽¹⁾

Advertising Recall

Respondents were asked whether they recalled seeing any advertising for the Caloundra region before leaving home. More than one third of respondents recalled seeing advertising before leaving home (36%). Fifty-nine percent (59%) of respondents did not recall seeing any advertising prior to leaving home, and 5% of respondents were unsure whether they had seen any advertising for the Caloundra region.

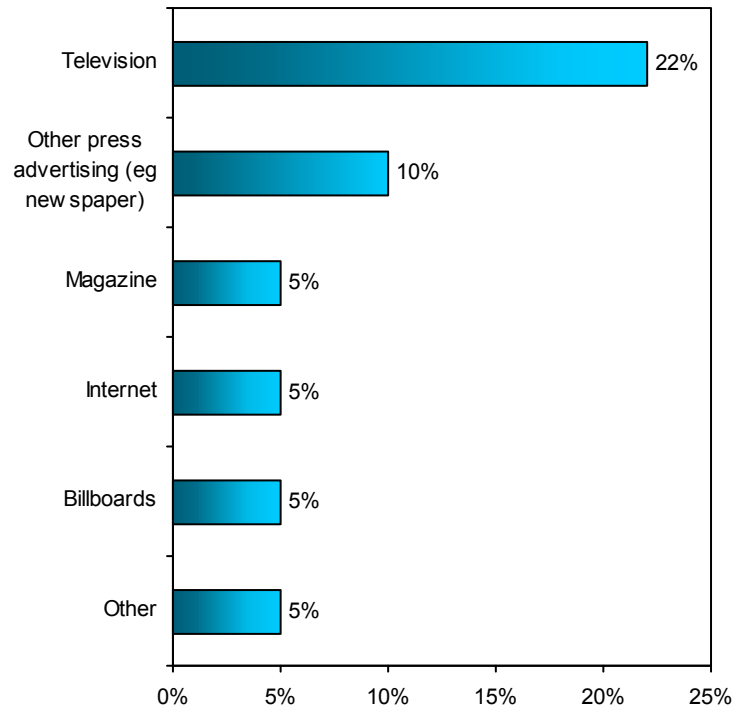
FIGURE 4 – ADVERTISING RECALL



Advertising Medium Recall ^{(2) (3)}

Respondents were also asked which advertising mediums they recalled seeing advertising for the Caloundra. Twenty-two percent (22%) of all respondents recalled seeing advertising for the Caloundra region on television, and 10% recalled seeing advertising in other press advertising.

FIGURE 5 – ADVERTISING MEDIUMS RECALLED



Caloundra Slogan

Respondents were asked whether they had heard the slogan for Caloundra, 'Lazy days, play days, every day'. Twelve percent (12%) of respondents indicated they had heard the slogan, while 83% stated they had never heard the slogan. Six percent (6%) of respondents stated they were unsure if they had heard the Caloundra slogan before.

Please note the slogan 'Lazy days, play days, every day' was not in use by Caloundra Tourism at the time the survey was conducted.

1. Base: All respondents
 2. Multiple responses accepted
 3. 'Other' consists of a range of responses each mentioned by fewer than 3% of respondents

DETAILS OF THE VISIT ⁽¹⁾ ⁽²⁾

Accommodation Used

Overnight visitors were asked about the main type of accommodation they used during their stay in Caloundra. Approximately one third of overnight visitors stayed in a rented apartment or holiday flat (35%), with a further 27% staying with friends or relatives. Other common accommodation types were caravans/cabins/tents and hotels/resorts (15% and 13% respectively).

Accommodation Booking Method ⁽³⁾

Overnight visitors who stayed in commercial accommodation were asked how they had booked their accommodation in Caloundra. The greatest proportion of these respondents either booked directly before leaving home (25%) or booked directly because they had stayed at the accommodation before (23%). Therefore in total 48% of visitors book their accommodation directly.

One in five respondents used the Internet to find their accommodation (20%, with equal proportions actually booking online or phoning to make the booking, 10% each). Eleven percent (11%) of respondents booked their accommodation through a real estate agent, 7% booked through a travel agent, and a further 6% did not book ahead of arriving in Caloundra. Nine percent (9%) of respondents used other methods for booking accommodation not listed above.

Accommodation Location

Overnight respondents were also asked where their accommodation was located in the Caloundra region. The greatest proportion of respondents stayed overnight in Caloundra (62%), while one in five overnight visitors stayed at Golden Beach (20%). The next largest proportion of respondents stayed in accommodation located in Moffat Beach (8%).

It should be noted that interviews were conducted at various locations around Caloundra and number of responses received for each accommodation location may have been affected by interview location. A breakdown of the number of interviews conducted in each location is provided in the methodology section of this report.

FIGURE 6 – ACCOMMODATION USED

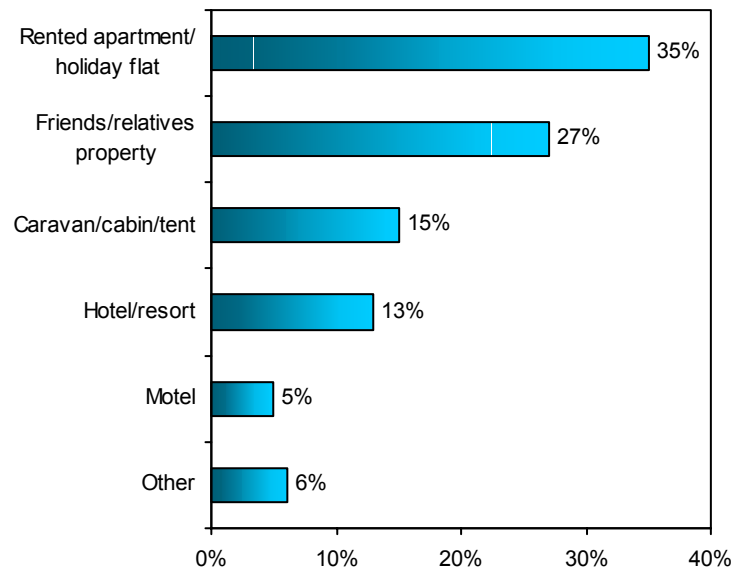
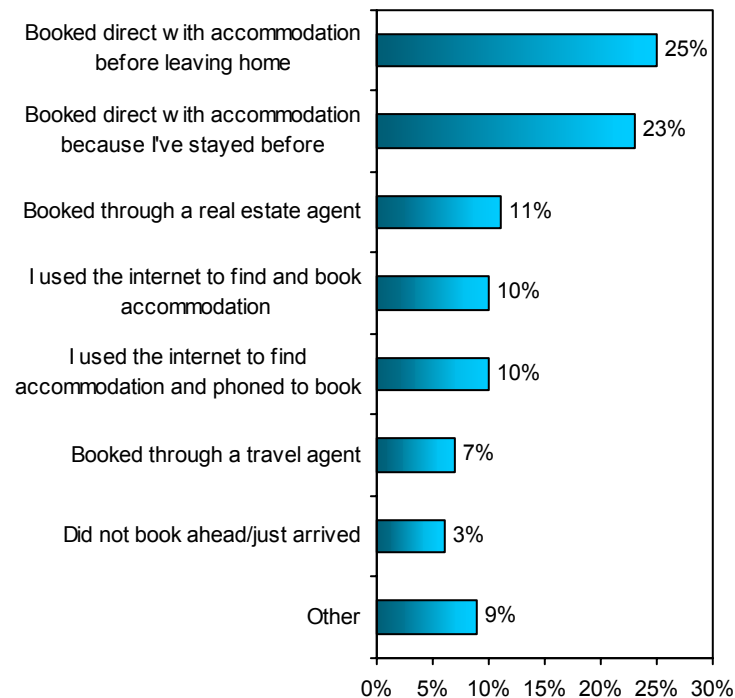


FIGURE 7 – ACCOMMODATION BOOKING METHOD



1. Base: Overnight visitors (n=268)

2. 'Other' consists of a range of responses each mentioned by fewer than 3% of respondents

3. Base: Overnight visitors staying in commercial accommodation (n=194)

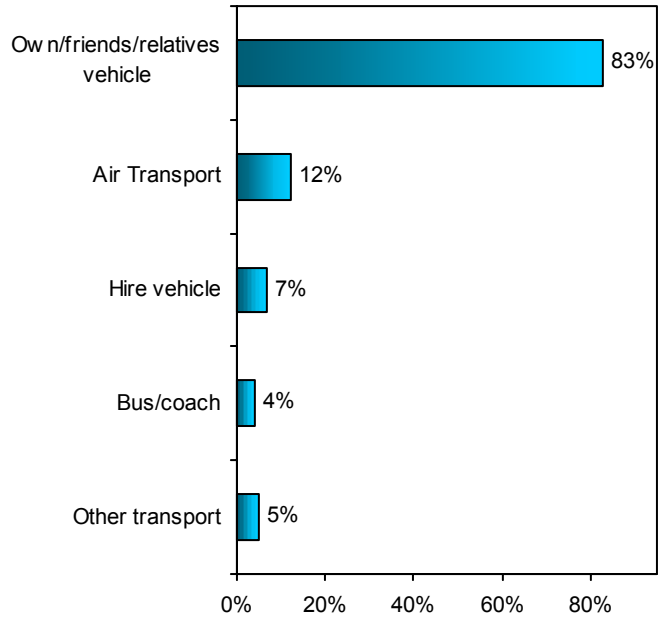
DETAILS OF THE VISIT ^{(1) (2)}

Form of Transportation ⁽³⁾

Respondents were asked which methods of transport they had used on their journey to Caloundra. The greatest proportion of visitors used their own/friends/relatives vehicle to travel to Caloundra (83%). Twelve percent (12%) of respondents used air transport on their journey to Caloundra, with three quarters of those flying into Brisbane airport (76%) and the remainder flying into Sunshine Coast airport (24%).

Seven percent (7%) of respondents used a hire vehicle to travel to Caloundra, while a small number of respondents travelled by bus/coach (4%). Five percent (5%) of respondents travelled to Caloundra via other methods of transport not mentioned above.

FIGURE 8 – FORM OF TRANSPORTATION

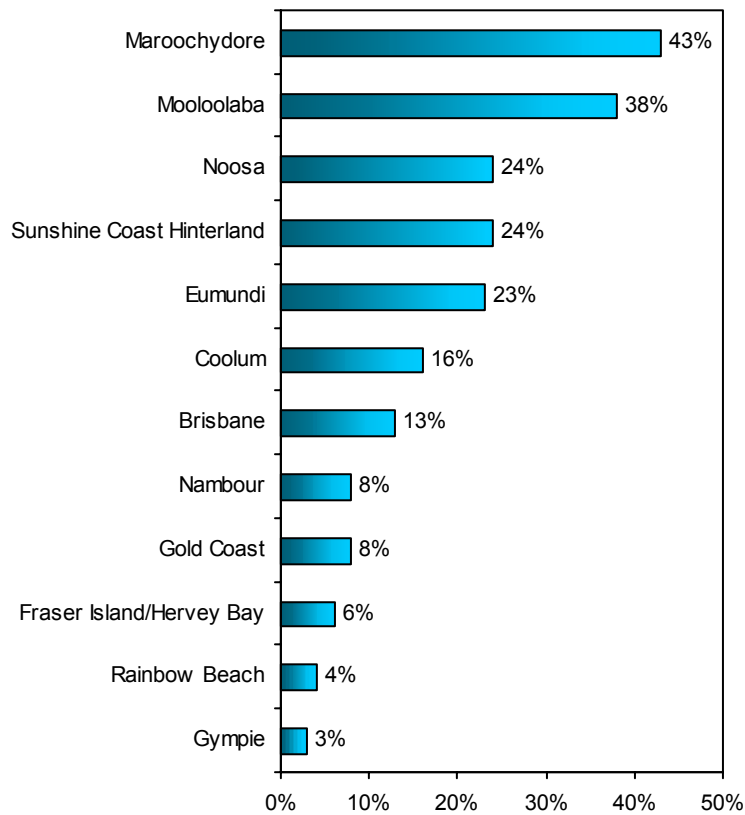


Places Visited

Respondents were asked whether they had visited or planned to visit on their current trip (apart from passing through). Forty-three percent (43%) of respondents indicated they had visited or planned to visit Maroochydore, while a slightly smaller proportion had visited or planned to visit Mooloolaba (38%).

Approximately one in four respondents had visited or planned to visit Noosa, the Sunshine Coast Hinterland or Eumundi (24%, 24%, and 23%, respectively)

FIGURE 9 – PLACES VISITED ON CURRENT TRIP



1. Base All respondents
 2. 'Other' consists of a range of transport types each mentioned by fewer than 3% of respondents
 3. Multiple responses accepted

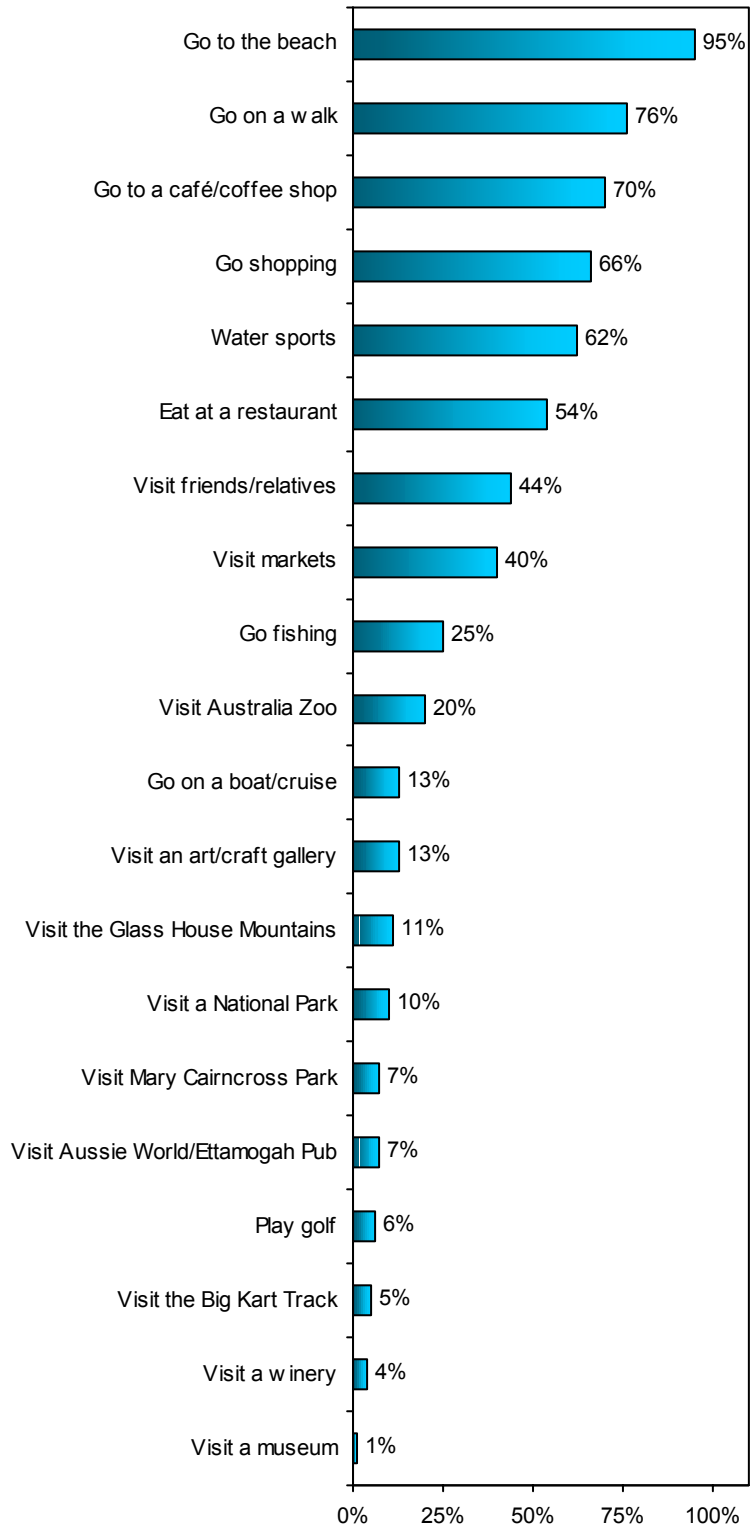
DETAILS OF THE VISIT ⁽¹⁾ ⁽²⁾

Activities

Respondents were asked what activities they had participated in (or planned to participate in) during their trip to Caloundra. The most popular activity was going to the beach (95%). In addition, a large proportion of respondents went on a walk (76%), went to a café/coffee shop (70%), went shopping (66%), participated in water sports (62%), ate at a restaurant (54%), visited friends/relatives (44%), and visited markets (40%).

It should be noted that interviews were conducted at various locations around Caloundra and the number of responses received for each activity may have been affected by interview location.

FIGURE 10 – ACTIVITIES



1. Base: All respondents
2. Multiple responses accepted

DETAILS OF THE VISIT

Motivation for Trip to Caloundra (1)

Respondents were asked about their motivations for their trip to Caloundra. The question asked respondents to indicate how strongly they agreed with statements on factors that motivated them to take their trip. Responses were measured on a five-point scale, where one equalled strongly disagree and five equalled strongly agree.

The most common motives for taking the trip to Caloundra were to relax and rejuvenate (mean rating of 4.41) and to take a family holiday (mean rating of 4.13). Other popular motivations included spending time with one's partner (mean rating of 3.70) and enjoying the peace and quiet of an uncrowded destination (mean rating of 3.37).

Respondents were asked to think about their greatest motivation for taking their trip, and whether their trip to Caloundra had fulfilled that motivation. The largest proportion of respondents stated their trip did fulfil their greatest motivation (89%), while 8% of respondents said their trip only partially fulfilled their motivation, and a further 2% of respondents were unsure. One percent (1%) of respondents stated their trip did not fulfil their primary motivation, which was most commonly attributed to poor weather and windy conditions.

Intention to Return (2)

Respondents were also asked whether they would consider returning to Caloundra within the next three years for a holiday.

The greatest proportion of respondents intend to return to Caloundra for a holiday (83%), with a further 12% unsure about whether they will return. Five percent (5%) of respondents said they did not intend to return to Caloundra for a holiday within the next three years.

FIGURE 11 – TRIP MOTIVATION (MEAN RATINGS)

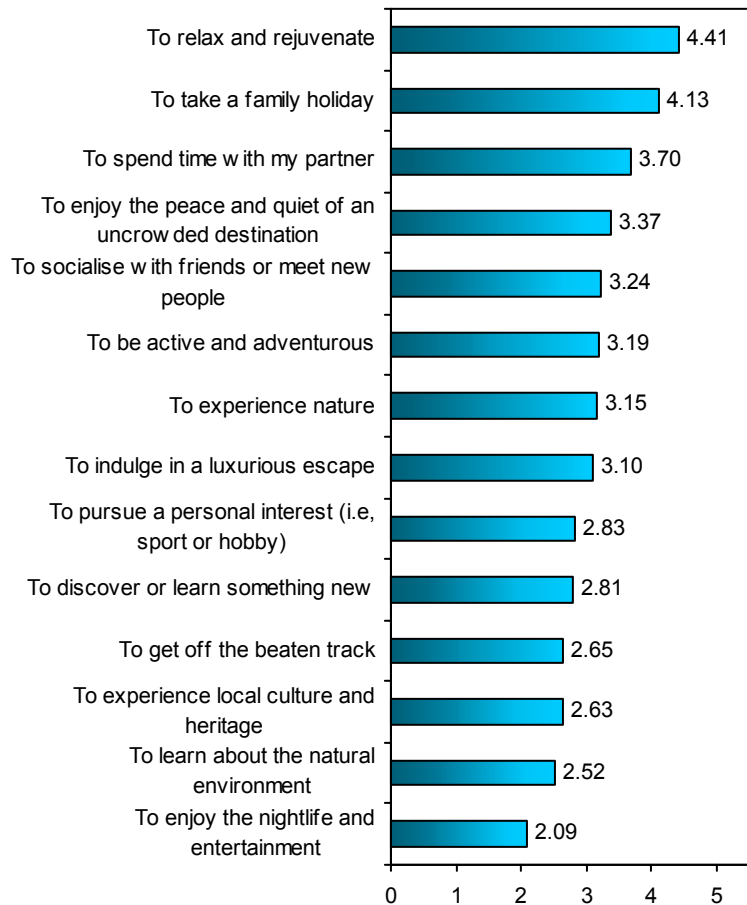


TABLE 2 - REASON FOR NON-FULFILLMENT OF GREATEST MOTIVATION

Reason	N
Poor weather/windy	3
"Too overcrowded, expected less people and less commercialisation"	1
"Made out to be more than it is. Travel agent and magazines talk up Caloundra. There are a lot more nicer places in Australia that I could have gone to, for cheaper e.g. Bondi Beach"	1

1. Base: All respondents (n varies for each statement; range from 318 responses to 335 responses)
 2. Base: All respondents

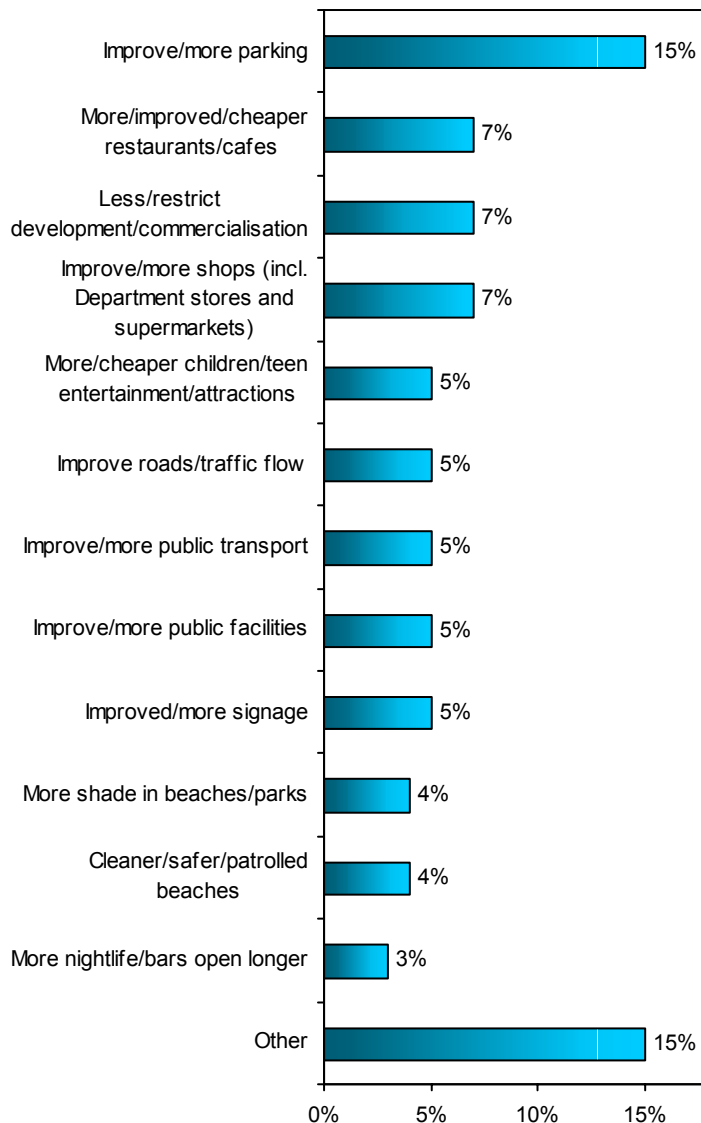
OPINIONS AND SATISFACTION

Respondents were asked what improvements they would like made to make Caloundra more enjoyable for visitors. They were also asked to rate their satisfaction with a number of aspects relating to their visit to Caloundra.

Possible Improvements ⁽¹⁾ ⁽²⁾ ⁽³⁾ ⁽⁴⁾

When asked for possible improvements that would make Caloundra more enjoyable for visitors, the most common suggestion was to improve or provide more parking (15%). Seven percent (7%) of respondents stated they would like to see more/improved/cheaper restaurants and cafes, less/restricted development and commercialisation, and improved/more shops.

FIGURE 12 – POSSIBLE IMPROVEMENTS



1. 'Other' consists of a range of responses, each mentioned by fewer than 3% of respondents

2. Base: All respondents

3. See Appendix A for a full list of 'Other' responses

4. Multiple responses accepted

OPINIONS AND SATISFACTION

Visitor Satisfaction ⁽¹⁾

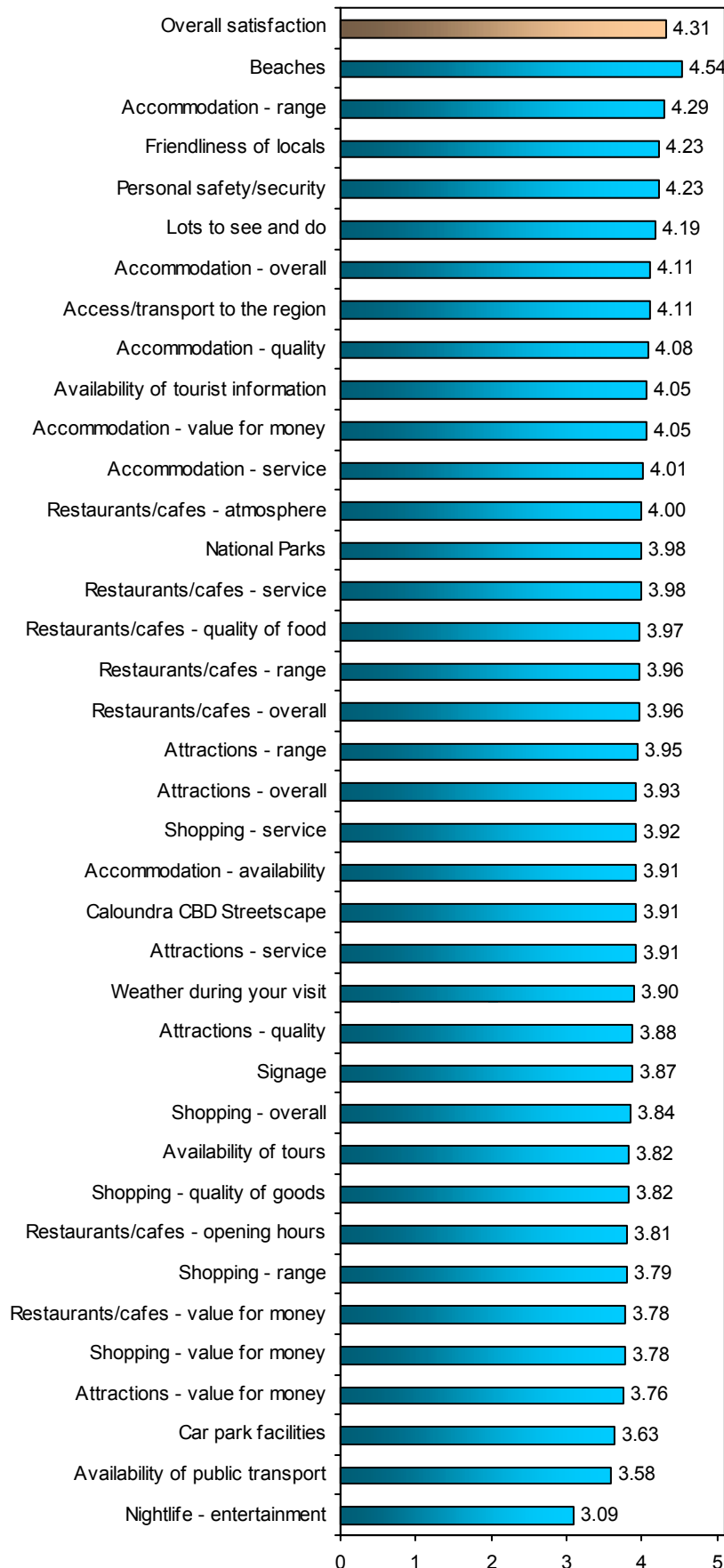
Respondent satisfaction with a number of aspects of Caloundra was measured on a five-point scale, where one equalled very dissatisfied and five equalled very satisfied.

The top five mean ratings received were for the beaches (4.54), the range of accommodation (4.29), friendliness of locals (4.23), personal safety/security (4.23) and lots to see and do (4.19).

The bottom five mean ratings received were for the nightlife/entertainment (3.09), the availability of public transport (3.58), car park facilities (3.63), the value for money of attractions (3.76) and the value for money of shopping (3.78).

Overall, Caloundra received a mean satisfaction rating of 4.31, with the majority of respondents stating they were either satisfied or very satisfied with their overall experience in Maroochy (94%). Five percent (5%) of respondents rated their overall satisfaction as neutral.

FIGURE 13 – SATISFACTION WITH ASPECTS OF CALOUNDRA (MEAN RATINGS)



1. Base size varies for each statement – details are provided in the table on the next page

TABLE 3 – SATISFACTION WITH ASPECTS OF CALOUNDRA

Aspect	N	Mean	Total Dissatisfied	1	2	Neutral	4	5	Total Satisfied
Beaches	343	4.54	2%	0%	2%	4%	31%	62%	94%
Accommodation - range	181	4.29	2%	1%	2%	9%	46%	43%	89%
Friendliness of locals	334	4.23	1%	0%	1%	13%	47%	39%	86%
Personal safety/security	327	4.23	2%	0%	2%	12%	47%	39%	86%
Lots to see and do	322	4.19	2%	1%	2%	12%	49%	37%	86%
Accommodation - overall	184	4.11	2%	1%	2%	13%	57%	29%	85%
Access/transport to the region	293	4.11	4%	1%	3%	15%	44%	36%	80%
Accommodation - quality	183	4.08	3%	1%	2%	15%	51%	31%	81%
Availability of tourist information	255	4.05	4%	2%	3%	17%	47%	32%	79%
Accommodation - value for money	177	4.05	3%	1%	3%	19%	46%	31%	77%
Accommodation - service	173	4.01	5%	2%	3%	17%	50%	28%	79%
Restaurants/cafes - atmosphere	275	4.00	2%	1%	1%	20%	54%	24%	78%
National Parks	191	3.98	4%	1%	3%	22%	46%	28%	74%
Restaurants/cafes - service	285	3.98	3%	0%	2%	21%	52%	25%	76%
Restaurants/cafés - quality of food	286	3.97	3%	0%	3%	20%	53%	24%	77%
Restaurants/cafes - range	285	3.96	5%	1%	4%	22%	46%	27%	74%
Restaurants/cafés - overall	281	3.96	4%	0%	4%	19%	55%	22%	77%
Attractions - range	264	3.95	3%	0%	3%	23%	48%	25%	73%
Attractions - overall	240	3.93	2%	1%	1%	23%	55%	20%	75%
Shopping - service	277	3.92	3%	0%	2%	23%	54%	21%	75%
Accommodation - availability	180	3.91	6%	3%	3%	21%	46%	27%	73%
Caloundra CBD Streetscape	306	3.91	5%	0%	5%	26%	42%	27%	69%
Attractions - service	234	3.91	3%	0%	3%	23%	55%	20%	74%
Weather during your visit	335	3.90	8%	3%	5%	22%	37%	32%	70%
Attractions - quality	242	3.88	2%	0%	2%	27%	52%	19%	71%
Signage	311	3.87	7%	2%	5%	21%	48%	24%	72%
Shopping - overall	276	3.84	2%	0%	1%	26%	58%	14%	72%
Availability of tours	146	3.82	5%	1%	4%	30%	42%	23%	65%
Shopping - quality of goods	270	3.82	3%	1%	2%	28%	52%	17%	69%
Restaurants/cafés - opening hours	263	3.81	8%	2%	6%	27%	39%	26%	65%
Shopping - range	282	3.79	6%	1%	5%	30%	44%	21%	65%
Restaurants/cafés - value for money	291	3.78	4%	1%	3%	29%	51%	16%	67%
Shopping - value for money	277	3.78	4%	0%	4%	29%	52%	16%	67%
Attractions - value for money	246	3.76	4%	1%	4%	30%	49%	16%	65%
Car park facilities	326	3.63	13%	4%	9%	30%	35%	23%	57%
Availability of public transport	143	3.58	15%	6%	10%	28%	34%	22%	57%
Nightlife/entertainment	147	3.09	28%	5%	22%	40%	22%	10%	32%
Overall satisfaction	343	4.31	1%	0%	1%	5%	56%	38%	94%

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

RESPONDENT PROFILE ⁽¹⁾

Sex

A higher proportion of females than males were interviewed (60% and 40%, respectively).

Origin

Approximately half of respondents originate from Brisbane (51%), with a further 23% originating from other Queensland regions. New South Wales and Victorian visitors collectively accounted for 15% of respondents. Less than one in ten respondents were from overseas (7%).

Of the respondents who originated from Brisbane, one third were from the Northern Suburbs of Brisbane (32%), 12% were from the Pine Rivers Shire, and one in ten originated from the Eastern Suburbs of Brisbane (10%). ⁽²⁾

Refer to Appendix B for detailed information on the breakdown of Caloundra visitors from the Brisbane region.

Age ⁽³⁾

The greatest proportion of respondents were aged between 35 and 44 years (34%) and 45 to 54 years (26%). The next greatest proportion of visitors were aged between 25 and 34 years (16%).

Travel Party

Fifty-five percent (55%) of respondents travelled as a family group on their visit to Caloundra. Approximately one quarter of respondents travelled as an adult couple (23%). Lone travellers accounted for 7% of visitors to Caloundra.

Friends or relatives travelling with children and friends or relatives travelling without children each accounted for a small proportion of visitors to Caloundra (7% and 5%, respectively), while the remaining 3% of visitors were comprised of other travel party types.

Household Income ⁽⁴⁾

Almost two thirds of the respondents have an annual household income below \$79,999 (61%). One quarter of respondents had an annual household income of \$100,000 or greater (24%).

FIGURE 14 – ORIGIN

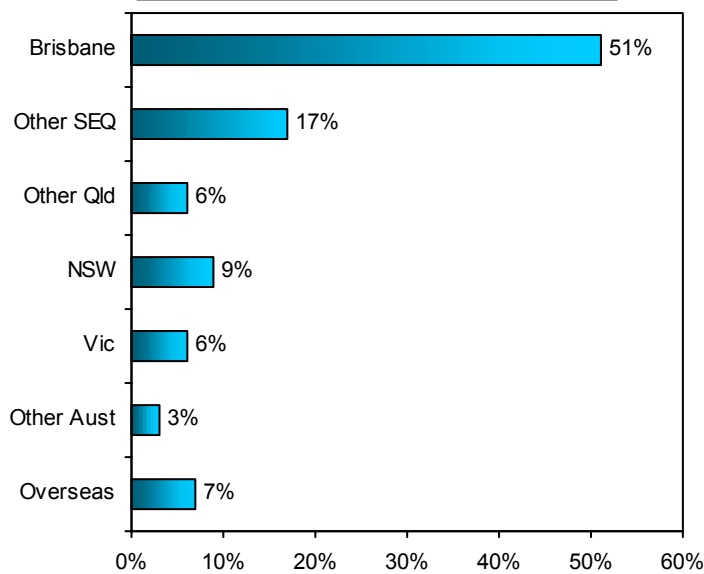


FIGURE 15 – AGE

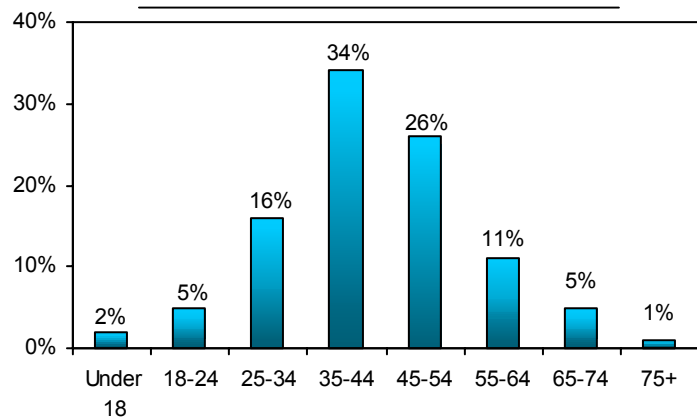
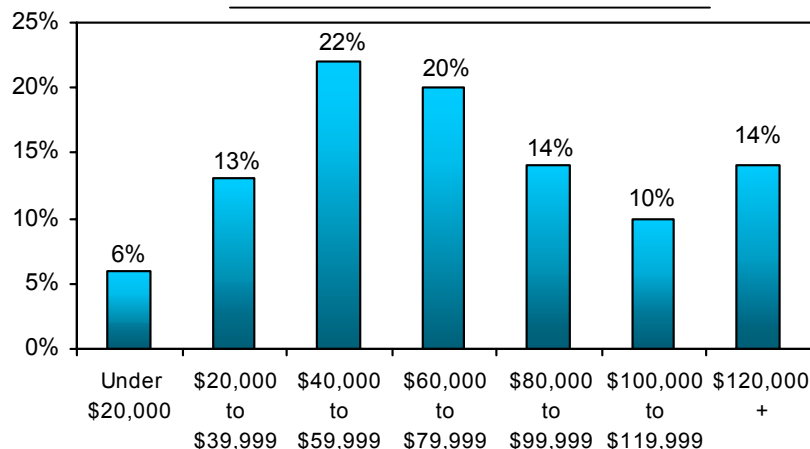


FIGURE 16 – ANNUAL HOUSEHOLD INCOME



1. Base: All respondents
 2. Please refer to Appendix B for a complete breakdown of Brisbane origin and a detailed description of the Brisbane region
 3. Base: N=343
 4. Base: N=270

DIFFERENCES BY LENGTH OF STAY

Subgroup comparisons should only be performed on groups with similar sized samples. For this reason, comparisons are not made on all possible subgroups.

This section presents results for subgroups based on **length of stay**. The subgroups included in the results and the sample sizes for each are:

Daytrip: n=80

Overnight: n=268

It should be noted that the 'length of stay' subgroups are not considered to be equal, so any direct comparisons made by the reader should be undertaken with caution.

Results by subgroup are only included if there were observational differences between the subgroups. The cross-tabulations of data in this section of the report have not undergone significance testing, hence any observational differences between subgroups of the samples may not be significantly different. Results are only presented where a difference of five (5) percentage points or more existed between the subgroups.

DETAILS OF THE VISIT BY LENGTH OF STAY

Main Purpose of Trip

The majority of daytrip and overnight visitors were visiting Caloundra for the purpose of a holiday (71% and 82% respectively).

Previous Visitation

The majority of daytrip and overnight visitors were on a return visit to Caloundra (89% and 84% respectively).

Information Sources ^{(1) (2)}

Eighty-four percent (84%) of daytrip visitors used their prior knowledge of the region when planning their trip to Caloundra. Over half of the overnight visitors to Caloundra also used their prior knowledge of the region when planning their trip (56%).

Advertising Recalled

Almost two thirds of day-trippers had not seen any advertising for Caloundra before leaving home (64%). Fifty-eight percent (58%) of overnight visitors did not recall seeing any advertising prior to leaving home.

FIGURE 17 – MAIN PURPOSE

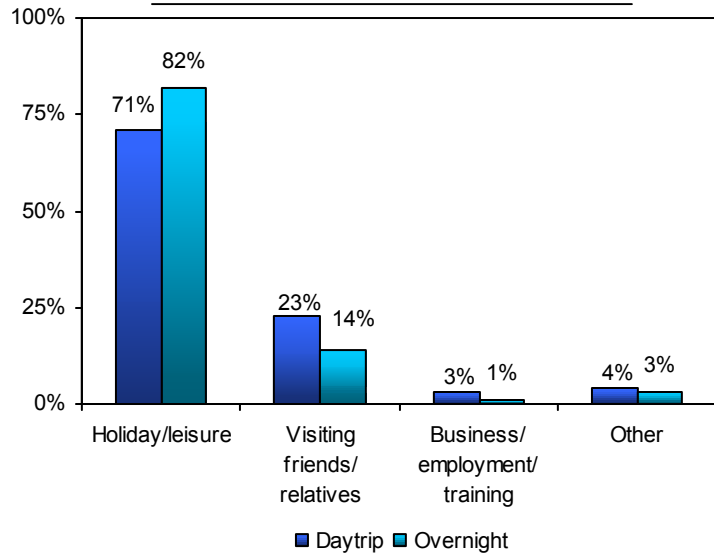


FIGURE 18 – PREVIOUS VISITATION

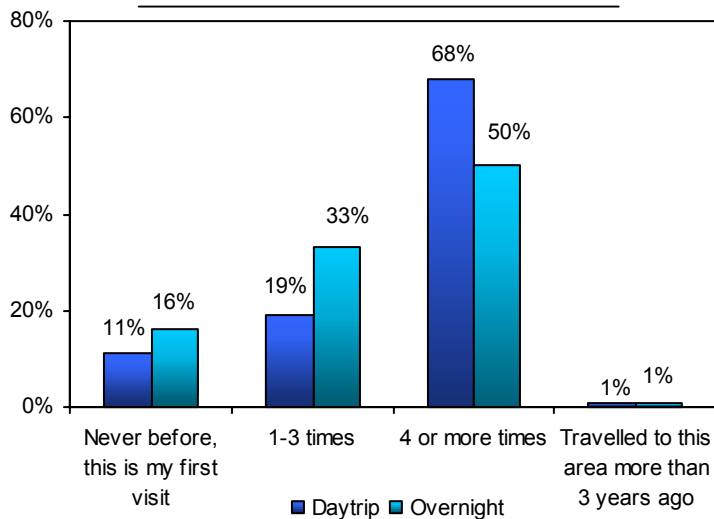


TABLE 4 – INFORMATION SOURCES

Information Sources Used	Daytrip (%)	Overnight (%)
None, had prior knowledge	84%	56%
Word of mouth	13%	21%
Internet	3%	17%
Travel brochure	3%	4%
Visitor information centre	3%	3%
Travel book-guide	1%	3%
Travel agent	0%	7%
Motoring organisation	0%	3%
Travel magazine	0%	1%
Other	3%	6%

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

DETAILS OF THE VISIT BY LENGTH OF STAY ⁽¹⁾

Form of Transportation ⁽²⁾

The majority of day-trippers to Caloundra used their own/friends/relatives vehicle to get to Caloundra (94%). Eighty percent (80%) of overnight visitors also utilised their own/friends/relatives vehicle on their journey to Caloundra.

TABLE 5 – FORM OF TRANSPORTATION

Form of Transportation	Daytrip	Overnight
Own/friends/relatives vehicle	94%	80%
Hire vehicle	5%	8%
Air Transport	3%	15%
Bus/coach	0%	5%
Railway	1%	1%
Motor home/campervan/ towing a caravan	0%	3%
Boat	0%	1%
Other	0%	1%

Places Visited

Over half of all overnight visitors to Caloundra visited Maroochydore (51%), and 46% visited Mooloolaba. Twenty-eight percent (28%) of overnight visitors also visited Eumundi, the Sunshine Coast Hinterland and Noosa.

Fifteen percent (15%) of daytrip visitors to Caloundra visited Maroochydore, and 13% visited Noosa.

TABLE 6 – PLACES VISITED

Places Visited	Daytrip	Overnight
Maroochydore	15%	51%
Noosa	13%	28%
Coolum	10%	18%
Nambour	9%	8%
Sunshine Coast Hinterland	9%	28%
Mooloolaba	9%	46%
Brisbane	9%	15%
Eumundi	8%	28%
Fraser Island/Hervey Bay	5%	7%
Gold Coast	5%	9%
Gympie	4%	3%
Rainbow Beach	0%	6%

Top 3 places visited for each sub group highlighted.

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

DETAILS OF THE VISIT BY LENGTH OF STAY ⁽¹⁾

Activities

The most popular activities participated in by day-trippers were going to the beach (88%), going to a café/coffee shop (63%), and participating in water sports (55%). The most popular activities undertaken by overnight visitors were going to the beach (98%), going on a walk (83%) and going shopping (76%).

TABLE 7 – ACTIVITIES

Activities	Daytrip	Overnight
Go to the beach	88%	98%
Go to a café/coffee shop	63%	72%
Water sports	55%	64%
Go on a walk	51%	83%
Go shopping	34%	76%
Visit friends/relatives	33%	48%
Eat at a restaurant	18%	65%
Visit markets	10%	49%
Visit Australia Zoo	8%	23%
Go fishing	5%	30%
Visit the Glass House Mountains	5%	13%
Visit a National Park	5%	11%
Go on a Boat/cruise	3%	16%
Visit Aussie World/Ettamogah Pub	1%	9%
Play golf	1%	7%
Visit an art/craft gallery	0%	16%
Visit a museum	0%	2%
Visit a winery	0%	5%
Visit the Big Kart Track	0%	7%
Visit Mary Cairncross Park	0%	10%

Top 5 activities for each sub group highlighted.

DETAILS OF THE VISIT BY LENGTH OF STAY

Motivation for Trip to Caloundra

The top three motivations for both daytrip and overnight visitors to visit Caloundra were to relax and rejuvenate (mean ratings of 4.11 and 4.50 respectively), to spend time with their partner (3.43 and 3.77 respectively), and to take a family holiday (3.25 and 4.50 respectively), however taking a family holiday took precedence over spending time with their partner for overnight visitors.

FIGURE 19 – MOTIVATION FOR TRIP TO CALOUNDRA



Return to Caloundra for a Holiday

Most day-trippers plan to return to Caloundra for a holiday within the next three years (76%), with 17% unsure whether they would return, and 7% stating they would not return within three years. Eighty-five percent (85%) of overnight visitors planned to return to Caloundra for a holiday within the next three years, with 11% unsure whether they would return, and 5% stating they would not return within three years.

OPINIONS AND SATISFACTION BY LENGTH OF STAY

Possible Improvements ⁽¹⁾ ⁽²⁾

The top three improvements for daytrip visitors were improved/more parking (16%), improved roads/traffic flow (6%), and less/restricted development/commercialisation (6%). The top three improvements for overnight visitors were improved/more parking (14%), improved/more shops (8%), and improved/more/cheaper restaurants/cafes (8%).

TABLE 8 – POSSIBLE IMPROVEMENTS

Improvements	Daytrip	Overnight
Improve/more parking	16%	14%
Improve roads/traffic flow	6%	5%
Less/restrict development/commercialisation	6%	7%
Improved/more signage	5%	4%
More/improved/cheaper restaurants/cafes	5%	8%
Improve/more public facilities	5%	5%
More/cheaper children/teen entertainment/attractions	4%	6%
Improve/more public transport	3%	6%
More shade in beaches/parks	3%	4%
More nightlife/bars open longer	3%	3%
Cleaner/safer/patrolled beaches	3%	4%
Improve/more shops (incl. Department stores and supermarkets)	1%	8%
Other	15%	15%

Top 3 improvements for each sub group highlighted.

Visitor Satisfaction

Table 9 on the following page presents the means ratings given by these two subgroups on specific aspects of the Caloundra region. The top five mean rating received from people on a day trip were for the beaches (4.53), personal safety/security (4.32), lots to see and do (4.27), friendliness of locals (4.22), access/transport to the region (4.13). The top five mean rating received from people staying overnight were for the beaches (4.54), friendliness of locals (4.23), the range of accommodation (4.29), personal safety/security (4.20), and lots to see and do (4.17).

1. Multiple responses accepted

2. 'Other' consists of a range of responses each mentioned by fewer than 3% of respondents

TABLE 9 – MEAN SATISFACTION WITH ASPECTS OF CALOUNDRA

Aspects of Caloundra	Daytrip	Overnight
Beaches	4.53	4.54
Personal safety/security	4.32	4.20
Lots to see and do	4.27	4.17
Friendliness of locals	4.22	4.23
Access/transport to the region	4.13	4.10
Restaurants/Cafes – atmosphere	4.11	3.97
Restaurants/Cafes – overall	4.09	3.92
Restaurants/Cafes – quality of food	4.09	3.94
Restaurants/Cafes – service	4.05	3.96
Weather during your visit	4.04	3.87
Attractions – service	4.03	3.88
Attractions – overall	4.02	3.90
Signage	4.01	3.83
Availability of tourist information	3.98	4.07
Restaurants/Cafes - opening hours	3.98	3.77
Attractions – range	3.96	3.95
Attractions – quality	3.95	3.86
National Parks	3.94	3.99
Caloundra CBD Streetscape	3.93	3.90
Shopping – quality of goods	3.93	3.80
Restaurants/Cafes – range	3.92	3.97
Shopping – service	3.87	3.94
Attractions – value for money	3.81	3.75
Shopping – overall	3.77	3.85
Shopping – range	3.77	3.80
Restaurants/Cafes - value for money	3.76	3.79
Availability of tours	3.74	3.83
Shopping – value for money	3.73	3.79
Availability of Public Transport	3.71	3.55
Car park facilities	3.68	3.62
Nightlife/entertainment	3.11	3.09
Accommodation – range	-	4.29
Accommodation – overall	-	4.11
Accommodation – quality	-	4.08
Accommodation – value for money	-	4.05
Accommodation – service	-	4.01
Accommodation – availability	-	3.91
Overall satisfaction	4.37	4.29

Scale: 1= Very Dissatisfied; 5= Very Satisfied
 Top 5 for each sub group highlighted in orange
 Bottom 5 for each sub group highlighted in green

RESPONDENT PROFILE BY LENGTH OF STAY

Origin

Over two thirds of daytrip visitors were from Brisbane (70%), with a further 19% originating from other areas of South East Queensland. Just under half of the overnight visitor to Caloundra were from Brisbane (45%), with 16% travelling from other areas of South East Queensland. A further 12% of overnight visitors to Caloundra originated from New South Wales.

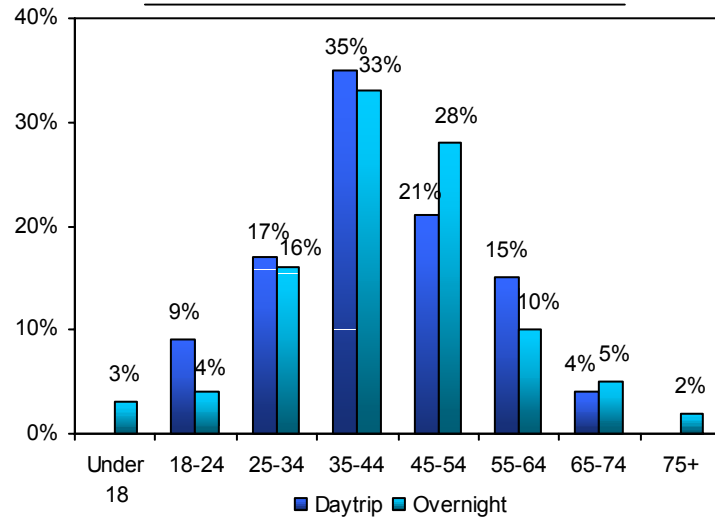
TABLE 10 – ORIGIN

Origin	Daytrip	Overnight
Brisbane	70%	45%
Other South East Queensland	19%	16%
Other Queensland	3%	8%
New South Wales	-	12%
Victoria	1%	8%
Other Australia	5%	2%
Overseas	3%	9%

Age

Thirty-five percent (35%) of day-trippers were aged between 35 and 44 years, and one in five were aged between 45 and 54 years (21%). One third of overnight visitors were aged between 35 and 44 years (33%), while 28% were aged between 45 and 54 years.

FIGURE 20 – AGE



Travel Party ⁽¹⁾

Half of the day-trippers to Caloundra were travelling as a family group (49%), and a further 25% were travelling as an adult couple. Fifty-seven percent (57%) of overnight visitors travelled to Caloundra as a family group, and 22% travelled as an adult couple.

TABLE 11 – TRAVEL PARTY

Travel Party	Daytrip	Overnight
A family group, parents and children	49%	57%
An adult couple (i.e.. partners in a relationship)	25%	22%
Friends/relatives travelling together with children	9%	6%
Friends/relatives travelling together without children	9%	4%
Yourself travelling alone	8%	7%
Independent adults travelling in a large group (no children)	0%	3%
Other	1%	1%

1. 'Other' consists of a range of responses each mentioned by fewer than 3% of respondents.

DIFFERENCES BY TRAVEL PARTY

This section presents results for sub-groups based on visitors' **travel party**. The sub-groups included in the results and the sample sizes for each are:

Travelling with children: 216 respondents
 Travelling without children: 129 respondents

It should be noted that the 'travel party' subgroups are not considered to be equal, so any direct comparisons made by the reader should be done with caution.

Results by subgroup are only included if there were observational differences between the subgroups. The cross-tabulations of data in this section of the report have not undergone significance difference testing, hence any observational differences between subgroups of the samples may not be significantly different. Results are only presented where a difference of five (5) percentage points or more existed between the subgroups.

DETAILS OF THE VISIT BY TRAVEL PARTY

Main Purpose

Eighty-eight percent (88%) of people travelling with children were travelling for holiday/leisure, and 29% were visiting friends/family. Two thirds of those travelling without children were travelling for holiday/leisure (67%), whilst 8% were visiting friends/family.

Previous Visitation

Eighty-nine percent (89%) of visitors travelling with children were repeat visitors to the Caloundra region. Seventy-eight percent (78%) of people travelling without children were repeat visitors.

Length of Stay

Forty-two percent (42%) of visitors travelling without children were staying in the Caloundra region for two nights or less. Sixty-one percent (61%) of people travelling with children were staying for five nights or more.

Information Sources ^{(1) (2)}

The majority of people travelling with and without children used with prior knowledge of the Caloundra region when planning their trip (65% and 60% respectively). Around one quarter of people travelling without children used word of mouth as an information source (23%), and 15% of people travelling with children used the internet as a source of information.

FIGURE 21 – PREVIOUS VISITATION

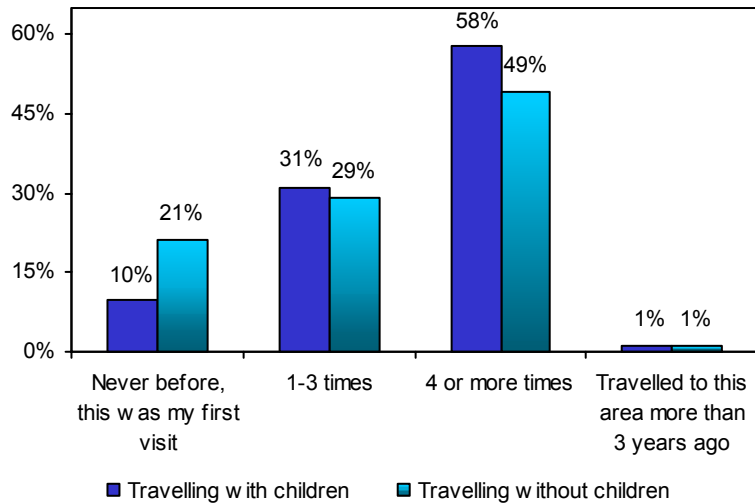


FIGURE 22 – LENGTH OF STAY

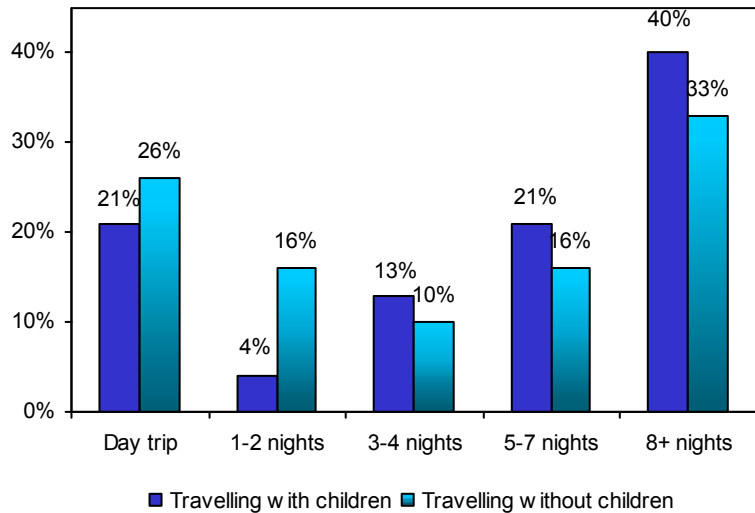


TABLE 12 – INFORMATION SOURCES

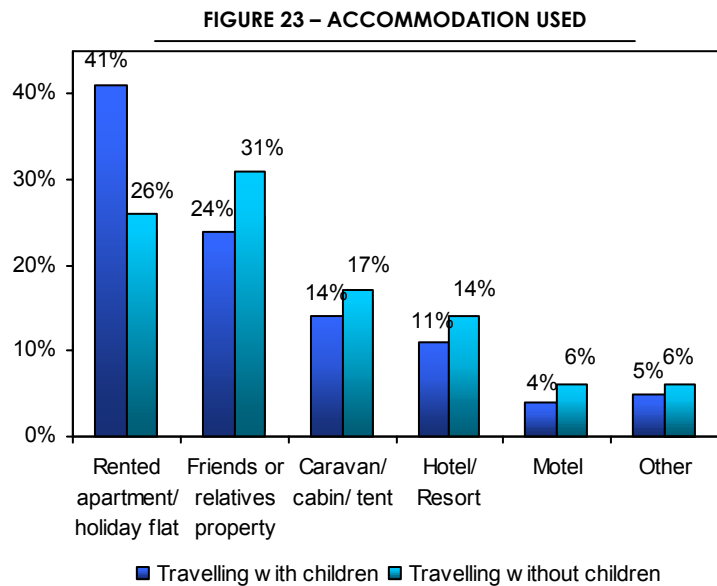
Information Sources	Travelling with Children	Travelling without Children
None, had prior knowledge	65%	60%
Word of mouth	16%	23%
Internet	15%	12%
Travel agent	4%	9%
Motoring organisation	3%	2%
Travel brochure	3%	5%
Visitor information centre	3%	4%
Travel book/guide	1%	5%
Other	6%	5%

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

DETAILS OF THE VISIT BY TRAVEL PARTY ⁽¹⁾

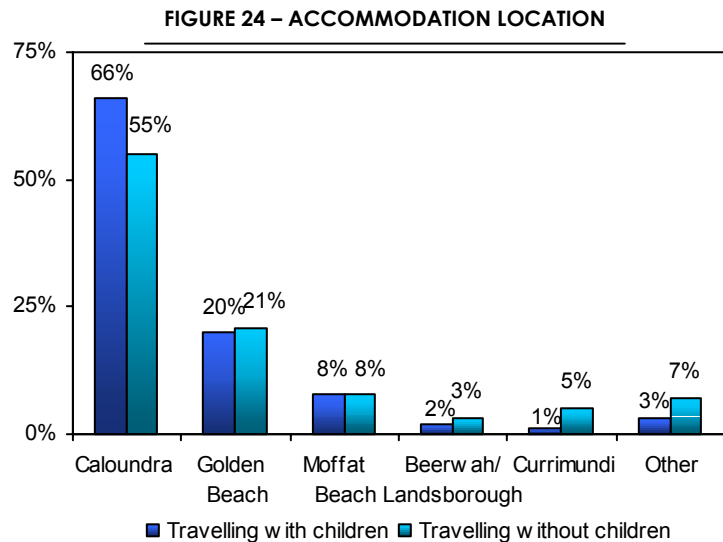
Accommodation Used

Forty-one percent (41%) of people travelling with children stayed in a rented apartment/holiday flat whilst in Caloundra and one quarter stayed with friends or family (24%). Just under one third of people travelling without children stayed at a friends or relatives property (31%), and a further 26% stayed in a rented apartment/holiday flat.



Accommodation Location

Two thirds of visitors travelling with children were staying in Caloundra (66%), and one in five stayed at Golden Beach (20%). Over half of people travelling without children stayed in Caloundra (55%), and 21% stayed at Golden Beach.



Accommodation Booking Method

One third of people travelling without children booked directly with their accommodation before leaving home (30%), and a further 19% booked direct with the accommodation as they had stayed there before. One quarter of people travelling with children booked direct with accommodation as they had stayed there before (25%), whilst a similar proportion booked direct with accommodation before leaving home (23%).

TABLE 13 – ACCOMMODATION BOOKING METHOD

Accommodation Booking Method	Travelling with Children	Travelling without Children
Booked direct with accommodation because I've stayed before	25%	19%
Booked direct with accommodation before leaving home	23%	30%
Booked through a real estate agent	14%	5%
I used the internet to find and book accommodation	10%	9%
I used the internet to find accommodation and phoned to book	9%	11%
Booked through a travel agent	7%	6%
Did not book ahead/just arrived	2%	14%
Other	9%	6%

Top 3 booking methods for each sub group

1. 'Other' consists of a range of responses each mentioned by fewer than 3% of respondents

DETAILS OF THE VISIT BY TRAVEL PARTY ⁽¹⁾

Form of Transportation ⁽²⁾

Ninety percent (90%) of those travelling with children used their own/friends/relatives vehicle on their journey to Caloundra, and a further 10% utilised air transport. Three quarters of people travelling without children utilised their own/friends/relative vehicle on the journey (72%), and 16% used air transport.

TABLE 14 – FORM OF TRANSPORTATION

Form of Transportation	Travelling With Children	Travelling Without Children
Own/friends/relatives vehicle	90%	72%
Air Transport	10%	16%
Bus/coach	1%	7%
Hire vehicle	6%	10%
Motor home, campervan, towing a caravan	1%	3%
Railway	0%	3%
Boat	-	2%
Other transport	1%	2%

Places Visited

The most popular places to visit for people travelling without children were Maroochydore (46%), Mooloolaba (40%), and Noosa (32%). The most popular places visited by people travelling with children were Maroochydore (42%), Mooloolaba (36%), and the Sunshine Coast Hinterland (23%).

TABLE 15 – PLACES VISITED

Places Visited	Travelling With Children	Travelling Without Children
Maroochydore	42%	46%
Mooloolaba	36%	40%
Sunshine Coast Hinterland	23%	25%
Eumundi	21%	26%
Noosa	20%	32%
Brisbane	9%	21%
Coolum	12%	24%
Gold Coast	7%	10%
Fraser Island/Hervey Bay	5%	9%
Nambour	4%	15%
Rainbow Beach	2%	7%
Gympie	2%	6%

Top 3 places visited for each sub group highlighted.

1. Multiple responses accepted

2. 'Other' consists of a range of responses each mentioned by fewer than 3% of respondents

DETAILS OF THE VISIT BY TRAVEL PARTY ⁽¹⁾

Activities

The majority of people travelling both with and without children went to the beach (96% and 95% respectively), went on a walk (74% and 80% respectively), and went to a café/coffee shop (67% and 74% respectively). Sixty-seven (67%) percent of people travelling without children went shopping and 63% of people travelling with children participated in water sports.

TABLE 16 – ACTIVITIES

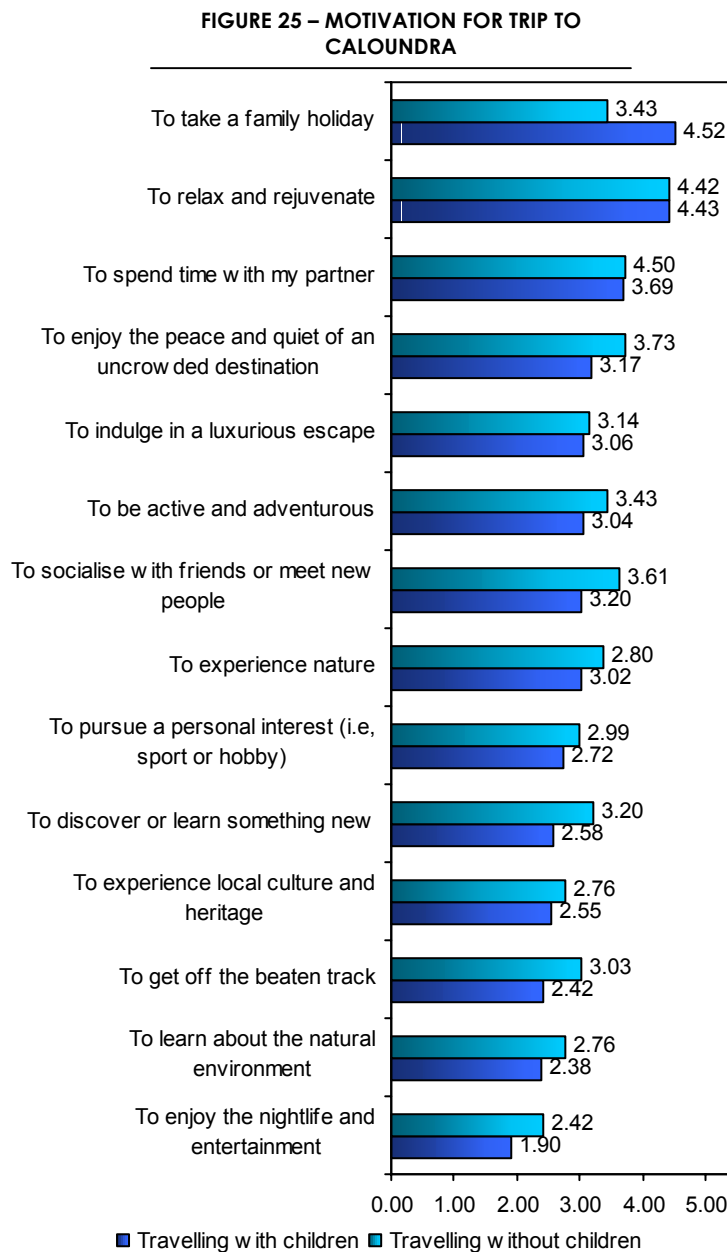
Activities	Travelling with Children	Travelling without Children
Go to the beach	96%	95%
Go on a walk	74%	80%
Go to a café/coffee shop	67%	74%
Go shopping	65%	67%
Water sports	63%	60%
Eat at a restaurant	56%	51%
Visit friends/relatives	42%	50%
Visit markets	41%	40%
Go fishing	25%	26%
Visit Australia Zoo	20%	19%
Go on a boat/cruise	12%	15%
Visit Mary Cairncross Park	8%	5%
Visit an art/craft gallery	11%	16%
Visit the Glass House Mountains	7%	17%
Visit a National Park	7%	14%
Visit Aussie World/Ettamogah Pub	6%	9%
Play golf	6%	5%
Visit the Big Kart Track	5%	5%
Visit a winery	3%	5%
Visit a museum	1%	2%

Top 5 activities for each sub group highlighted.

DETAILS OF THE VISIT BY TRAVEL PARTY

Motivation for Trip to Caloundra

The top three motivations for visitors travelling with children were to take a family holiday (4.52), to relax and rejuvenate (4.43), and to spend time with their partner (3.69). The top three motivations for visitors travelling without children were to relax and rejuvenate (4.42), to enjoy the peace and quiet of an uncrowded destination (3.73) and to spend time with their partner (3.73).



Return to Caloundra for a Holiday

Most visitors travelling with children planned to return to Caloundra for a holiday within the next three years (85%), with 10% unsure whether they would return and 5% stating they would not return within three years. Similarly, the greatest proportion of visitors travelling without children planned to return to Caloundra for a holiday within the next three years (80%), with 16% unsure whether they would return, and 5% stating they would not return within three years.

OPINIONS AND SATISFACTION BY TRAVEL PARTY

Possible Improvements

The top three improvements for people travelling with children were improved/more parking (14%), more/improved/cheaper restaurants/cafes (9%), and improved/more shops (8%). The top three improvements for those travelling without children were improved/more parking (16%), less/restricted development/commercialisation (8%), and improved/more public transport (7%).

TABLE 17 – POSSIBLE IMPROVEMENTS

Improvements	Travelling with Children	Travelling without Children
Improve/more parking	14%	16%
More/improved/cheaper restaurants/cafes	9%	5%
Improve/more shops (incl. Department stores and supermarkets)	8%	5%
More/cheaper children/teen entertainment/attractions	7%	2%
Less/restrict development/commercialisation	6%	8%
Improve roads/traffic flow	6%	5%
Cleaner/safer/patrolled beaches	5%	2%
Improve/more public transport	4%	7%
Improved/more signage	4%	5%
Improve/more public facilities	4%	7%
More shade in beaches/parks	3%	5%
More nightlife/Bars open longer	1%	5%
Other	14%	17%

Top 3 improvements for each sub group highlighted.

Visitor Satisfaction

Table 18 on the following page presents the means ratings given by these two subgroups on specific aspects of the Caloundra region.

TABLE 18 – MEAN SATISFACTION WITH ASPECTS OF CALOUNDRA

Aspects of Caloundra	Travelling with Children	Travelling without Children
Beaches	4.52	4.57
Accommodation – range	4.35	4.21
Personal safety/security	4.21	4.27
Friendliness of locals	4.21	4.26
Lots to see and do	4.20	4.18
Accommodation – overall	4.14	4.08
Access/transport to the region	4.14	4.04
Accommodation – quality	4.09	4.05
Accommodation – value for money	4.05	4.02
Availability of tourist information	4.03	4.07
Accommodation – service	4.03	3.98
Attractions – range	3.99	3.88
Restaurants/cafés – service	3.99	3.95
Restaurants/cafés – atmosphere	3.96	4.06
National Parks	3.95	3.98
Restaurants/cafés – range	3.95	3.97
Caloundra CBD Streetscape	3.95	3.84
Restaurants/cafés – quality of food	3.94	4.02
Shopping – service	3.94	3.90
Attractions – overall	3.93	3.93
Signage	3.93	3.79
Attractions – service	3.92	3.88
Restaurants/cafés – overall	3.89	4.06
Attractions – quality	3.89	3.86
Accommodation – availability	3.87	4.00
Shopping – overall	3.86	3.80
Shopping – quality of goods	3.83	3.80
Shopping – range	3.83	3.72
Shopping – value for money	3.83	3.68
Weather during your visit	3.82	4.03
Restaurants/cafés – opening hours	3.81	3.80
Attractions – value for money	3.77	3.73
Availability of tours	3.76	3.92
Restaurants/cafés – value for money	3.76	3.80
Car park facilities	3.63	3.64
Availability of public transport	3.61	3.53
Nightlife/entertainment	3.10	3.09
Overall satisfaction	4.33	4.29

Scale: 1= Very Dissatisfied; 5= Very Satisfied
 Top 5 for each sub group highlighted in orange
 Bottom 5 for each sub group highlighted in green

RESPONDENT PROFILE BY TRAVEL PARTY

Origin

More than half of those travelling with children were from Brisbane (56%), with a further 16% originating from other areas of South East Queensland.

Forty-one percent (41%) of people travelling without children originated from Brisbane, with a further 19% travelling from other areas of South East Queensland.

TABLE 19 – ORIGIN

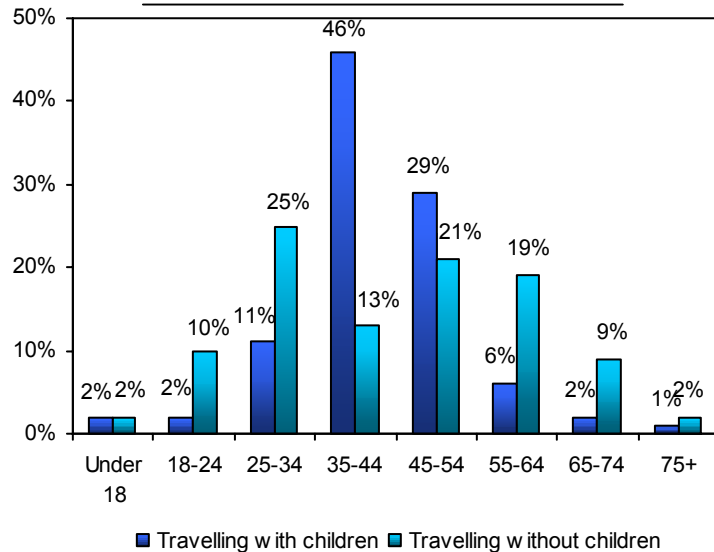
Origin	Travelling With Children	Travelling Without Children
Brisbane	56%	41%
Other South East Queensland	16%	19%
Other Queensland	7%	6%
New South Wales	9%	10%
Victoria	7%	4%
Other Australia	1%	6%
Overseas	4%	12%

Age

Three quarters of the visitors travelling with children were aged between 35 and 54 (75%), and one third were between 45 and 54 years of age (29%).

One quarter of people travelling without children were aged 25 to 34 years (25%), with a further 21% aged between 45 and 54, and 19% aged between 55 and 64.

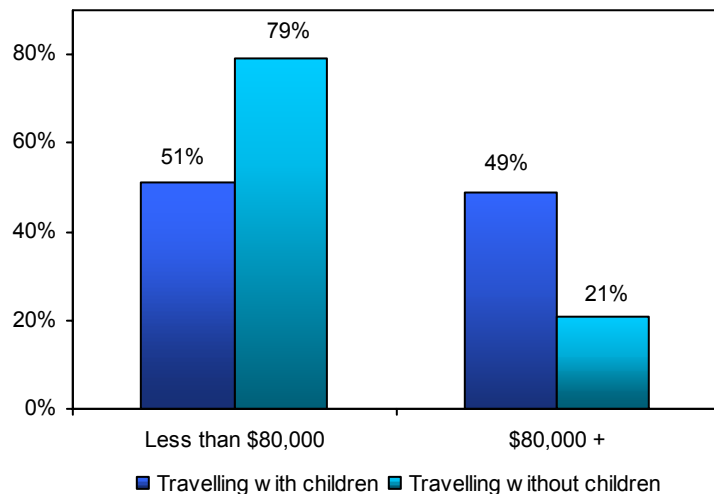
FIGURE 26 – AGE



Household Income by Travel Party

Seventy-nine percent (79%) of people travelling without children had a household income below \$80,000. Half of those travelling with children had a household income of \$80,000 or more (49%).

FIGURE 27 – HOUSEHOLD INCOME



TRACKING OF RESULTS

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

- Wave 1 – January 2003: 403 respondents
- Wave 3 – January 2004: 421 respondents
- Wave 5 – January 2005: 349 respondents

Results by subgroup are only included if there were differences between the sub groups. The cross-tabulations of data in this section of the report have not undergone significance difference testing, hence any observational differences between subgroups of the samples may not be significantly different. Results are only presented where a difference of five (5) percentage points or more exist between the subgroups.

Not all of the questions included in this report were asked in previous waves. Therefore, only questions that were asked across wave are included in this section.

Interviewing for Wave 5 was conducted in coastal areas of Caloundra, while various Hinterland locations were included during waves 1 and 3. The decision was made by regional stakeholders to exclude the Hinterland region from this survey, as a distinct Hinterland analysis, incorporating all Sunshine Coast Hinterland areas, will be conducted during the next wave of the survey. As Wave 5 was only undertaken in the coastal areas of the Caloundra region, caution is recommended when making observational comparisons across waves on various aspects of the survey.

DETAILS OF THE VISIT BY WAVE

Previous Visitation

There has been a slight increase over time of visitors who have been to Caloundra four times or more (from 46% in 2003 to 54% in 2005).

Length of Stay

Since January 2003, there has been an increase in the proportion of overnight visitors staying for more than one week in the Caloundra region (from 39% in 2003 to 48% in 2005).

FIGURE 28 – PREVIOUS VISITATION

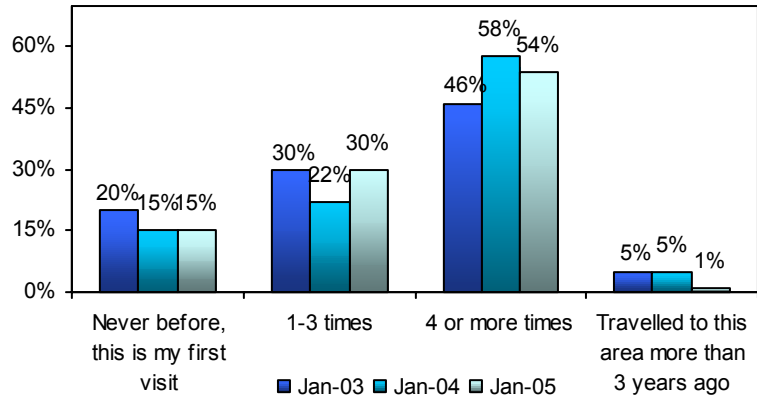
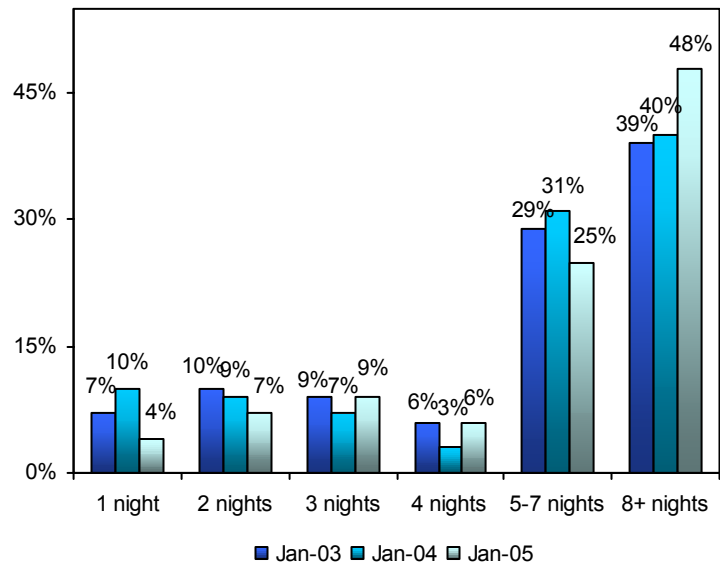


FIGURE 29 – LENGTH OF STAY

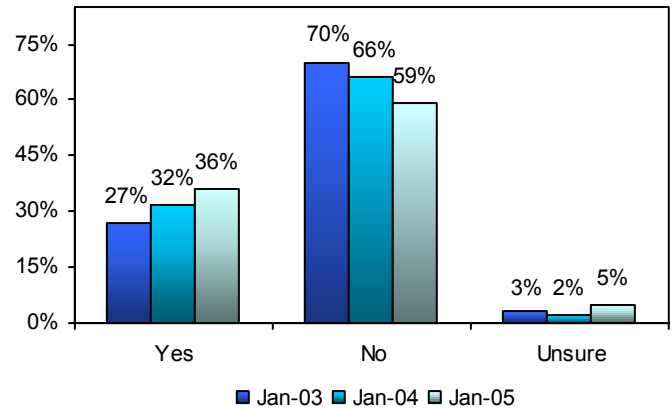


DETAILS OF THE VISIT BY WAVE

Advertising Recall

There has been a steady increase in the proportion of people who could recall seeing advertising for Caloundra since January 2003 (from 27% in 2003 to 36% in 2004).

FIGURE 30 – ADVERTISING RECALL



Advertising Medium Recall ⁽¹⁾

Since January 2003 there has been an increase in the proportion of visitors recalling seeing television advertisements for the Caloundra region (up from 13% in 2003 to 22% in 2005).

TABLE 20 – ADVERTISING MEDIUMS RECALLED

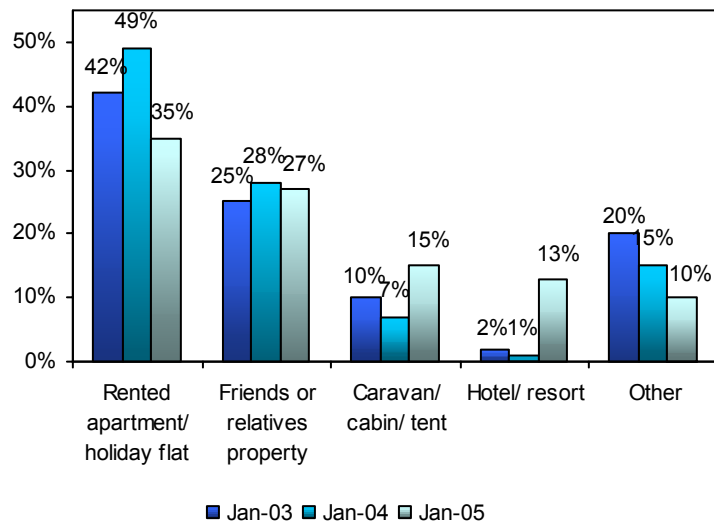
Advertising Mediums Recalled	January 2003	January 2004	January 2005
Television	13%	17%	22%
Other press advertising (eg newspaper)	10%	9%	10%
Magazine	5%	6%	5%
Internet	N/A	3%	5%
Billboards	1%	11%	5%
Outdoor/transit	1%	1%	1%
Other	5%	3%	4%

Accommodation Used ⁽²⁾

In January 2005, a greater proportion of visitors used caravan/cabin/tents or hotel/resorts as accommodation while staying in Caloundra, compared to previous years.

Please note that differences over time with regard to caravan/cabin/tent and hotel/resort may be partially due to different wording in previous wave of the Caloundra Visitor Survey. That is, in the 2003 and 2004 waves, hotel and resort were separate accommodation options. Similarly, for the 2005, caravan/tent has been combined with cabin, whereas these were separate options in 2003 and 2004.

FIGURE 31 – ACCOMMODATION USED



1. Multiple responses accepted
2. Base: Overnight visitors only

OPINIONS AND SATISFACTION BY WAVE

Possible Improvements

Restricting development in Caloundra and improving/providing more parking have been in the top three mentioned improvements by visitors since the first wave of the survey in January 2003.

TABLE 21 – POSSIBLE IMPROVEMENTS

Improvements	January 2003	January 2004	January 2005
Improved/more parking	8%	10%	15%
Improved/more restaurants and cafes (including extended opening hours)	6%	4%	7%
Restrict development (e.g. no more high-rises)	14%	9%	7%
More/ improved shops	3%	-	7%
More/cheaper children/teen entertainment/attractions	-	-	5%
Improve traffic flow/roads	3%	8%	5%
Improved/more public facilities/amenities	10%	9%	5%
Improved/more public transport	2%	3%	5%
Improved/more signage	3%	4%	5%
More shade/sheltered areas	-	4%	4%
Cleaner/safer/patrolled beaches	-	-	4%
More entertainment /activities/attractions (including extended opening hours)	-	-	3%
Less crowding/touristy/commercial	-	5%	-
Maintenance/cleanliness of town and public areas	3%	3%	-
More tourist information	3%	-	-
Other	13%	17%	15%

Top 3 improvements for each sub group highlighted.

Visitor Satisfaction

Overall, there was little difference between the mean ratings given by visitors over the three waves of the survey. However, consistent declines in satisfaction between January 2003 and January 2005 were noted with the following aspects of Caloundra: nightlife/entertainment (from 3.55 to 3.09), restaurant/café atmosphere (from 4.09 to 3.81), restaurant café range (from 4.15 to 3.96), availability of tours (from 4.16 to 3.82), shopping overall (from 4.06 to 3.84), weather (from 4.49 to 3.90), National Parks (from 4.34 to 3.98), and friendliness of the locals (from 4.55 to 4.23). In contrast, satisfaction with Caloundra beaches has increase between January 2003 and January 2004 (up from 4.41 to 4.54).

Table 22 on the following page presents the means ratings given by respondents in each of the waves on specific aspects of the Caloundra region.

TABLE 22 – MEAN SATISFACTION WITH ASPECTS OF CALOUNDRA

Aspects of Caloundra	January 2003	January 2004	January 2005
Beaches	4.41	4.41	4.54
Accommodation - range	4.34	4.23	4.29
Friendliness of locals	4.55	4.30	4.23
Personal safety/security	4.34	4.23	4.23
Lots to see and do	4.41	4.05	4.19
Accommodation - overall	4.16	4.05	4.11
Access/transport to the region	4.27	3.86	4.11
Accommodation - quality	4.17	4.06	4.08
Availability of tourist information	4.29	3.95	4.05
Accommodation - value for money	4.03	4.02	4.05
Accommodation - service	4.14	4.02	4.01
Quality of beaches	4.42	4.47	4.00
National Parks	4.34	4.13	3.98
Restaurants/cafes - service	4.02	3.90	3.98
Restaurants/cafes - quality of food	4.00	3.94	3.97
Restaurants/cafes - range	4.15	4.01	3.96
Restaurants/cafes - overall	4.06	3.95	3.96
Attractions - range	4.17	3.91	3.95
Attractions - overall	4.11	3.86	3.93
Shopping - service	4.09	3.90	3.92
Accommodation - availability	4.03	3.79	3.91
Caloundra CBD Streetscape	4.02	3.62	3.91
Attractions - service	4.11	3.82	3.91
Weather during your visit	4.49	4.01	3.90
Attractions - quality	4.07	3.80	3.88
Signage	3.99	3.76	3.87
Shopping - overall	4.06	3.87	3.84
Availability of tours	4.16	3.92	3.82
Shopping - quality of goods	4.01	3.82	3.82
Restaurants/cafes - atmosphere	4.09	3.98	3.81
Shopping - range	4.11	3.77	3.79
Restaurants/cafes - value for money	3.99	3.86	3.78
Shopping - value for money	3.94	3.75	3.78
Attractions - value for money	3.90	3.67	3.76
Car park facilities	3.84	3.57	3.63
Availability of public transport	3.54	3.30	3.58
Nightlife/entertainment	3.55	3.15	3.09
Overall satisfaction	4.39	4.22	4.31

Scale: 1= Very Dissatisfied; 5= Very Satisfied
 Top 5 for each sub group highlighted in orange
 Bottom 5 for each sub group highlighted in green

RESPONDENT PROFILE BY WAVE

Origin

Since January 2003, the proportion of visitors coming to Caloundra from Brisbane has increased (up from 44% in 2003 to 51% in 2005).

In each wave of the survey, the majority of visitors travelling from Brisbane originated from the Northern Suburbs of Brisbane (29% in 2003, 23% in 2004, and 32% in 2005). (1)

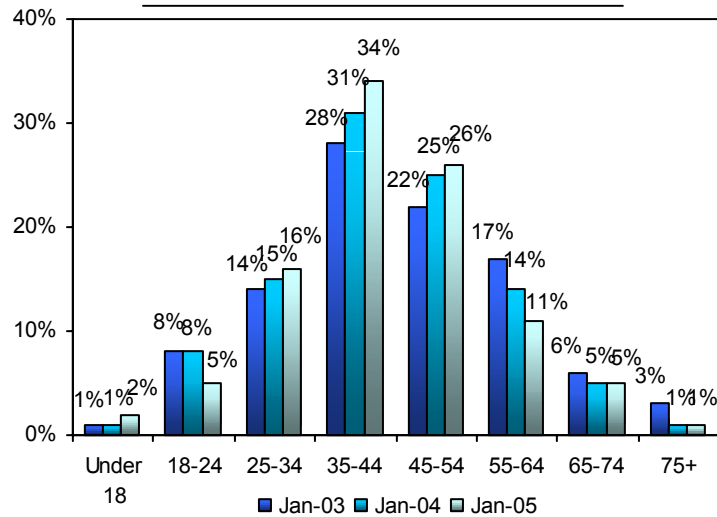
TABLE 23 – ORIGIN

Origin	January 2003	January 2004	January 2005
Brisbane	44%	44%	51%
Other Queensland	26%	27%	23%
New South Wales	12%	9%	9%
Victoria	5%	6%	6%
Other Australia	4%	2%	3%
Overseas	9%	11%	7%

Age

There has been an increase in the proportion of visitors aged between 35 and 54 years of age since January 2003 (from 50% in 2003 to 60% in 2005). Conversely, the proportion of visitors aged between 55 and 64 years has declined from 17% in 2003 to 11% in 2005.

FIGURE 32 – AGE



Travel Party

Since January 2003 there has been an increase in the proportion of visitors travelling as a family group (parents and children, 42% in 2003 to 55% in 2005), and a decrease in the proportion of visitors travelling to the Caloundra region with no children in the travel party (52% in 2003 to 46% in 2005).

TABLE 24 – TRAVEL PARTY

Travel Party	January 2003	January 2004	January 2005
A family group, parents and children	42%	46%	55%
An adult couple (i.e., partners in a relationship)	30%	23%	23%
Yourself travelling alone	11%	10%	7%
Friends/relatives travelling together with children	5%	8%	7%
Friends/relatives travelling together without children	10%	10%	5%
Independent adults travelling in a large group (no children)	1%	3%	2%
Other	0%	0%	1%

1. Please refer to Appendix B for a complete breakdown of Brisbane origin and a detailed description of the Brisbane region

APPENDIX

APPENDIX A – POSSIBLE IMPROVEMENTS “OTHER” RESPONSES

Possible Improvements	N
More walking areas like walking tracks	10
At night no lighting (for Bulcock Beach)	3
Lighting on boardwalk to kings beach	1
Building site hours should be 8am not 10 to 7	1
No people surveying. Enjoy peace and quiet	1
Improvement in main street	1
Boardwalk between Golden Beach and Bulcock with \out going on road. Lighting on boardwalk at kings	1
More green space/does not like the concrete (water park) at Kings Beach	1
A new cinema complex, more comfortable	1
Improve atmosphere in the main street	1
Probably upkeep of the parks	1
One more cinema. More bins in parks	1
Perhaps some more walk ways near the beach to make it easier to cross creeks	1
Consistent 4-6 foot swell	1
Recycling facilities throughout region very poor	1
Lifts in high-rise. Better management of hoons around Kings beach	1
Shorter survey.less wind. nicer people	1
Nicer weather	1
Everything not so expensive in holiday time-getting out of reach of the average person	1
Less people	1
More lower range accommodation. Buderim Pines caravan park disgusting.	1
Leave caravan parks open	1
More atms	1
Upgrade of Bulcock Street as it looks old and ratty	1
Revamp of main street (Bulcock). Pedestrian access only	1
Difficulties finding a caravan park to stay in a campervan	1
Spanish translation on tourist brochures	1
King's beach - maintain a high standard (Cleanliness) of the sand, paths at the beach	1
Destink beaches;	1
More trendy, overdone	1
Better maps in tourist brochures - scales, overviews	1
Need to redo Bulcock st, shut cars out of the street so only walkers can go there like the Queen st mall	1
Less crowds that spoil the area	1
Advertise open vacant land near beaches to promote beaches; Over the top with paying for signs, e.g., esp. on hwy that can advertise the region's major sporting events; national parks need upgrading; get area, water supply & sunshine to beautifying area; pump sand and make a channel to Mooloolaba to get cruise ships into the region. A proper dock would be excellent to tourism even through Pumicestone passage via just dredging/pumping and for a receiving wharf.	1
More market stalls aimed at men, like machinery and tools	1
Better footpaths. Some places (parks) kept cleaner	1

APPENDIX A – POSSIBLE IMPROVEMENTS “OTHER” RESPONSES

Possible Improvements	N
Main street in CBD needs urgent attention	1
Backpacker info for international and local students	1
More markets	1
Area for dogs	1
Improve the lifesavers complex, perhaps put on a new deck, have an eatery	1
More tourist info, civic maintenance-tree cutting	1
Wider range of motels	1
Too many people	1
Better access to northern beaches (Maroochydore)	1
Standard of restaurants is poor, standard of accommodation is poor for the price paid in the area	1
More promotion	1
More cheaper accommodation	1
No footpath dining, retain camping on beach fronts	1
A bread shop/newsagent at Kings Beach	1
Continue the boardwalk.	1
More police patrols at night at King's beach (due to groups), police presence - walking, not in cars.	1
A person who goes along selling water along the beach	1

APPENDIX B – DETAILED BRISBANE VISITOR ORIGIN ⁽¹⁾

Northern Suburbs of Brisbane includes along the Brisbane River from Brisbane City in the South West to Pinkenba in the North East, to Ferny Grove, Everton Park and Bridgeman Downs in the West, and from Bald Hills and Brighton in the North to the Brisbane River in the South.

Pine Rivers Shire extends from Ocean View in the North West to Griffin in the North East, and from Mount Nebo in the South West to Everton Hills in the South East.

The Eastern Suburbs of Brisbane incorporates the area along the Brisbane River from Kangaroo Point and Woolloongabba in the West to Lytton and Manly in the East, and from Wishart and Rochedale in the South West to Capalaba West and Burbank in the South East.

Caboolture Shire includes from Bellthorpe in the North West to Bribie Island in the North East, and from Mt Mee in the South West to Deception Bay in the South East.

The Western Suburbs of Brisbane extends along the Brisbane River from Milton and Paddington in the East to Chuwar and Kholo in the South West, and from England Creek and Banks Creek in the North West to Upper Kedron and The Gap in the North East.

Brisbane's Southern Suburbs includes along the Brisbane River from South Brisbane and West End in the East to Wacol in the West, and from Eight Mile Plains and McGregor in the East to Forest Lake and Heathwood in the West, and to Drewvale, Berrinba and Karawatha in the South East.

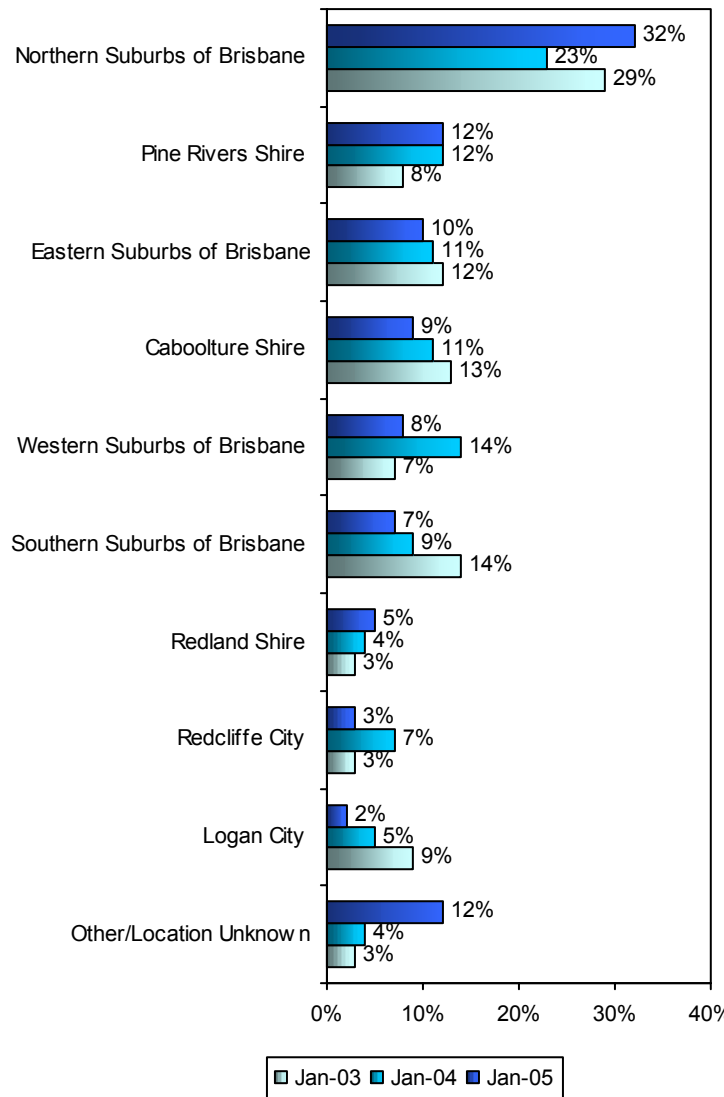
Redland Shire includes from Thornside in the North to Mount Cotton in the South West and Redland Bay in the South East (also includes Stradbroke, Peel, Coochiemudlo, Macleay, Lamb, Karragarra, Pannikin and Russell Islands).

Redcliffe City includes from Kippa-Ring in the North West to Scarborough in the North East, and from Clontarf Beach in the South West to Woody Point in the South East.

Logan City includes from Greenbank in the West to Carbrook in the East, and from Rochedale South in the North to Park Ridge and Loganholme in the South.

Other/Location Unknown refers to regions of Brisbane which are included in the Regional Tourist Association (RTO) definition of Brisbane, but are not included in the Australian Bureau of Statistics (ABS) definition of Brisbane. This category also includes visitors who specified '4000' as their postcode, rather than providing their exact suburb postcode.

FIGURE 33 – BRISBANE ORIGIN BY WAVE



1. Information pertaining to shire/city boundaries was obtained via each respective council website. Shire/city divisions current as at March 2005.

FURTHER INFORMATION

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