



# Caloundra Visitor Survey June 2006

Prepared by the Tourism Queensland

Research Department in September 2006



The Caloundra Visitor Survey was conducted to help gain a better understanding of the region's tourism market. Caloundra is situated an hour's drive north of Brisbane and is known for its perfect weather and numerous attractions. The survey was conducted during June 2006, coinciding with the low tourist season.

Survey results indicate that respondents travelled mostly as a couple, have an annual household income under \$60,000 and live in Queensland (with 30% of respondents originating from Brisbane). Half the respondents were aged 45 years or over.

For the majority of respondents the purpose of their visit was for a holiday or for leisure, for a smaller proportion it was to visit friends and relatives. Respondents were commonly motivated to take their trip to relax and rejuvenate, to enjoy the peace and quiet of an uncrowded destination and to spend time with their partner.

Seven in every ten respondents were on a return visit to Caloundra, therefore, it is not surprising that the greatest proportion of participants used their prior knowledge of the area when planning their trip. Other important sources of information were word of mouth followed by the internet. Predictably respondents from South East Queensland were more likely than other respondents to use their prior knowledge of Caloundra to plan their trip.

Results show that most respondents stayed at least one night in Caloundra, with the majority staying either at Kings, Golden or Bulcock Beach. Rented apartments or holiday flats were the most popular type of accommodation, which respondents tended to book directly with the property prior to leaving home. Participants aged 18 to 44 years were more likely to use the internet to find and book accommodation than those aged 45 years and over. Those on a short break, 1 or 2 nights, tended to arrive in the destination and find accommodation with little pre-planning.

Typically respondents visit Mooloolaba and Maroochydore as part of their holiday itinerary. The most popular activities undertaken include going to the beach; to a café or coffee shop; on a walk and going shopping. Interestingly, respondents originating from outside of South East Queensland, as well as those staying three or more nights, were more likely to visit a greater number of locations and participate in a larger range of activities on their holiday than other respondents.

Respondents found the beaches in Caloundra the most appealing aspect. The relaxed, peaceful, laidback and quiet atmosphere was also frequently mentioned. Not surprisingly satisfaction levels were the highest for beaches, the friendliness of the locals and respondents personal safety and security. When survey participants were prompted for possible improvements, the largest proportion indicated they felt Caloundra should lessen or restrict the development and commercialisation of the area as well as improve or create more parking and lessen the cost of goods at cafes in the area (as well as improve and increase the number in general).

Attributes of Caloundra that stand out consistently across waves include: Caloundra is seen as a place people can have a holiday to relax and rejuvenate; the beaches are a major draw card and deliver high visitor satisfaction; the cafes and restaurants are popular; the locals are friendly; and visitors feel safe and secure when in the region. Overall satisfaction with Caloundra was high (89%) and seven out of ten respondents indicated they would return within the next three years for a holiday.

in partnership with



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<b>Executive Summary</b> .....	<b>4</b>
<b>Introduction</b> .....	<b>3</b>
<b>Methodology</b> .....	<b>4</b>
<b>Sunshine Coast Visitor Profile</b> .....	<b>6</b>
<b>Overview of Findings</b> .....	<b>12</b>
<b>Respondent Profile</b> .....	<b>17</b>
Travel Party/Income.....	18
Age/Origin.....	19
<b>Motivation For Trip</b> .....	<b>20</b>
<b>Information Sources and Advertising</b> .....	<b>22</b>
Information Sources.....	23
Advertising.....	24
<b>Details of Trip</b> .....	<b>25</b>
Purpose of Visit/Length of Stay.....	27
Accommodation.....	27
Places Visited.....	28
Activities .....	29
<b>Satisfaction, Appeals and Improvements</b> .....	<b>30</b>
Satisfaction.....	31
Appeals.....	38
Improvements/Intention to Return.....	34
<b>Appendices</b> .....	<b>35</b>
Appendix A: Detailed Brisbane Respondent Origin.....	35
<b>Further Information</b> .....	<b>36</b>

The Caloundra Visitor Survey was undertaken by the Tourism Queensland Research Department, in partnership with Caloundra Tourism and as part of the Sunshine Coast regional research program coordinated by Tourism Sunshine Coast. It is envisaged 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 track the profile and opinions of visitors to Caloundra over time.

This report presents the findings of the June 2006 Caloundra Visitor Survey. Results are presented in isolation, and where possible in relation to results of previous waves of the survey conducted in June 2004 and June 2005.

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 is based on the Standard Visitor Survey and was designed by Tourism Queensland in consultation with Tourism Sunshine Coast and Caloundra Tourism. The questionnaire included questions about visitor demographics, travel behaviour, improvements, motivations and satisfaction.

Interviewing was conducted from 30 May 2006 until 15 June 2006, coinciding with the region’s low tourist season and incorporating the Queen’s Birthday long weekend (Saturday 10 to Monday 12 June) and the celebrations commemorating 70 years of the Spitfire at the Caloundra Air Museum. In total, 317 surveys were completed. In the June 2005 wave a total of 203 surveys were completed from 23 May until 12 June 2005 (also coinciding with the Queen’s Birthday long weekend Saturday 11 to Monday 13 June 2005). In both the June 2006 and June 2005 waves interviews were conducted by Community solutions. In June 2004 421 interviews were completed (06 to 23 June 2004; incorporating the Queen’s Birthday long weekend 12 June to 14 June 2004) and Oaki Doaki Business Consultants were commissioned to undertake the interviews. In all waves interviewers were trained by Tourism Queensland staff.

It should be noted that interviewing for the June 2006 and June 2005 waves was only conducted in coastal areas of Caloundra, while various Hinterland locations were included in June 2004. Regional stakeholders decided to exclude Hinterland interviewing locations after the June 2004 wave of the Caloundra Visitor Survey due to the implementation of a separate Sunshine Coast Hinterland Visitor Survey. The considerable difference in interviewing locations between waves limits the ability to interpret changes across waves. Readers are advised to use caution when comparing June 2006 and June 2005 results with earlier waves. Detailed information on the interviewing locations of each wave are presented in Table 1.

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	June 2004		June 2005		June 2006	
	N	%	N	%	N	%
Kings Beach	45	11%	44	22%	88	28%
Bulcock Beach	46	11%	110	54%	74	24%
Moffat Beach	61	15%	29	14%	49	16%
Golden Beach	1	<1%	4	2%	30	10%
Dicky Beach	-	-	2	1%	29	9%
Bulcock Street	56	13%	11	5%	14	4%
Caloundra	-	-	-	-	26	8%
Happy Valley	-	-	2	1%	4	1%
Mary Cairncross	155	37%	-	-	-	-
Maple Street	47	11%	-	-	-	-
Australia Zoo	6	1%	-	-	-	-
Currimundi	4	1%	-	-	-	-
Not specified	-	-	1	<1%	3	<1%
<b>Total</b>	<b>421</b>	<b>100%</b>	<b>203</b>	<b>100%</b>	<b>317</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. 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. To improve the validity of results when comparing the groups, some variables were recoded, collapsing some response categories to allow for a more robust sample size.

Selected questions in the survey were analysed by cross-tabulation to find any notable differences between different groups of respondents. The **sub-groups** of particular interest for this research are determined by visitors' **origin, age and length of stay**. 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.

While reported figures between cross tabulations do vary, not all differences are statistically significant. Significance testing was conducted at the 95% level of confidence, thus where differences are significant there is a 95% chance that they are "real" differences and not due to random chance. Any variable in the report, where there is a statistically significant difference between the sub-groups, the larger proportion has been highlighted with an asterisk (\*).

Please note the data has not been weighted hence the results in this report refer to the survey samples only and cannot be extrapolated to the general population.

# SUNSHINE COAST VISITOR PROFILE



The following section provides an overview of Sunshine Coast tourism performance, obtained from various national data sources (details on these data sources are provided at the end of this report). The Sunshine Coast Visitor Profile contains data for the wider Sunshine Coast tourism region and helps to provide a context for the interpretation of results of the Caloundra Visitor Survey.

Due to limited sample, national tourism data sets cannot be used to profile visitors at a local tourism area level, hence the need for undertaking the Caloundra Visitor Survey.

## Visitors and Expenditure

- According to Tourism Research Australia (TRA), Queensland received 24% of the 69,923,000 domestic overnight trips taken in the year ending December 2005. The Sunshine Coast received 17% of the 16,448,000 domestic overnight trips taken in Queensland.
- Additionally, Queensland received 26% of the \$64.4 billion spent in Australia by domestic and international tourists in the year ended December 2005. Of the \$39,252 million<sup>^</sup> spent in Australia by domestic overnight visitors Queensland received 28% and the Sunshine Coast received 4%.

**TABLE 2 – VISITORS, VISITOR NIGHTS AND EXPENDITURE ON THE SUNSHINE COAST – YE DECEMBER 2005**

	Domestic Daytrip visitors to the Sunshine Coast	Domestic Overnight visitors to the Sunshine Coast	International Visitors to the Sunshine Coast
Visitors	3,980,000	2,727,000	233,000
Visitor nights	n/a	10,965,000	2,021,000
Expenditure	\$335 million	\$1,525 million <sup>^</sup>	\$165 million <sup>^</sup>
% of total expenditure in Australia	3%	4%	1%
Average length of stay	n/a	4 nights	9 nights
Average Expenditure per visitor	\$84	\$560	\$711
Average Expenditure per night	n/a	\$139	\$82

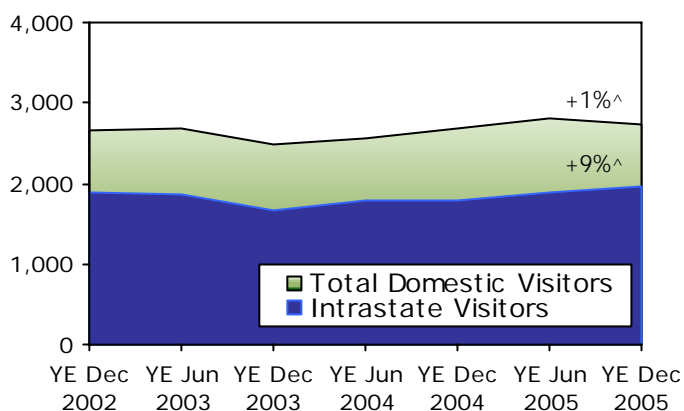
(Source: TRA – Visitor Expenditure by Domestic and International Visitors in Australia's Regions, 2005)

n/a – not applicable; <sup>^</sup> - figure includes airfares and long distance transport

## Visitors

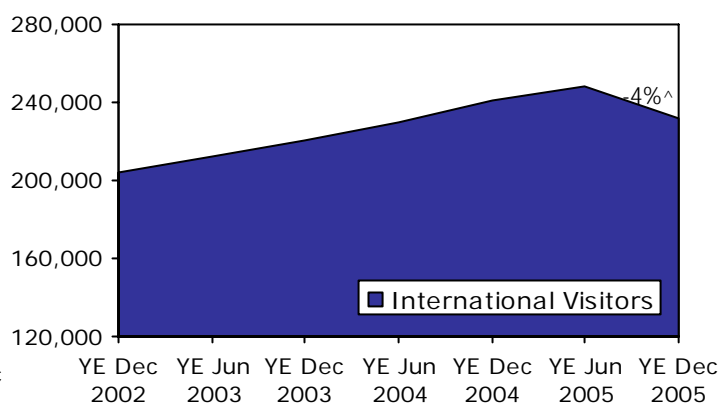
- According to the National Visitor Survey (NVS), the Sunshine Coast received approximately 2,727,000 domestic overnight visitors in the year ended December 2005. Almost three-quarters of these were intrastate visitors (1,956,000).
- The International Visitor Survey (IVS) estimate the Sunshine Coast received 233,000 international visitors, 11% of all international visitors who visited Queensland in the year ending December 2005.

**FIGURE 1 – DOMESTIC OVERNIGHT VISITORS ('000)**



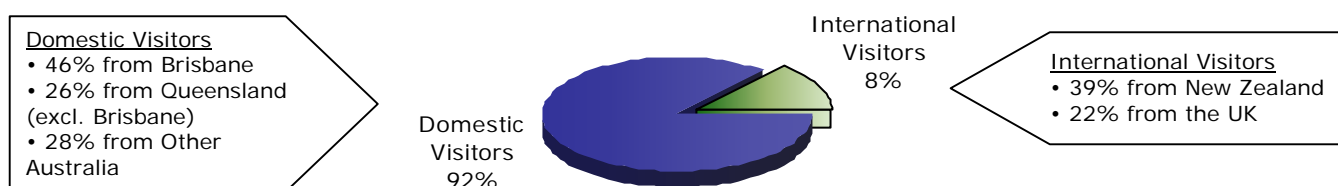
(Source: TRA – NVS, 2002-2005)  
<sup>^</sup> - Growth YE Dec 2005 on YE Dec 2004

**FIGURE 2 – INTERNATIONAL VISITORS**



(Source: TRA – IVS, 2002-2005)  
<sup>^</sup> -Growth YE Dec 2005 on YE Dec 2004

**FIGURE 3 – ORIGIN OF OVERNIGHT VISITORS**



(Source: TRA – NVS & IVS, YE Dec 2005)

Fifty-nine percent of domestic overnight visitors to the Sunshine Coast in 2005 were visiting for holiday or leisure. Three quarters of international visitors to the Sunshine Coast were on a holiday.

**TABLE 3 – PURPOSE OF VISIT TO THE SUNSHINE COAST**

Domestic Overnight	International
Holiday or leisure 59%	Holiday 76%
Visiting friends or relatives 32%	Visiting friends or relatives 19%
Business 7%	Business 3%

(Source: TRA – NVS & IVS, YE Dec 2005)

**FIGURE 4 – SUNSHINE COAST OVERNIGHT DOMESTIC VISITOR PROFILE**

• **Travel Party** - 36% were travelling as an adult couple, 27% as a family and 21% with friends or relatives

• **Accommodation** – 33% stayed with friends or relatives; 29% rented house, apartment or flat; 21% hotel, resort, motel or motor inn

• **Most popular activities** – ate at a restaurant (61%), went to the beach including swimming (60%), visited friends and relatives (44%), and went shopping (42%)

• **Age** - 42% were between 25 and 44 years of age; 37% were aged 45 to 64 years

(Source: TRA – NVS, YE Dec 2005)

## Domestic Daytrip visitors

- According to the NVS, the Sunshine Coast received 14% of all Australians who went on a day trip within Queensland in the year ended December 2005.
- Over half of all domestic day-trippers to the Sunshine Coast were from Brisbane (57%) and one third were from the Sunshine Coast (29%).
- Sixty percent of these day-trippers went to the Sunshine Coast for holiday or leisure purposes, while a further one in five were visiting friends or relatives (21%).

**TABLE 4 – ACTIVITIES PARTICIPATED IN BY DOMESTIC DAY-TRIPPERS**

Activity	% of Daytrip Visitors to the Sunshine Coast
Eat out at a restaurant	57%
Go to the beach	30%
Visit friends or relatives	27%
Go shopping	27%

(Source: TRA – NVS, YE Dec 2005)

## Commercial Accommodation

- The Survey of Tourist Accommodation (STA) shows the average room occupancy in Sunshine Coast hotels, motels, guest houses and serviced apartments decreased slightly from 64.9% in the year ended December 2004 to 61.7% in the year ended December 2005.
- The average length of stay in commercial accommodation on the Sunshine Coast was 3.6 days in 2005.

**TABLE 5 – SUNSHINE COAST COMMERCIAL ACCOMMODATION**

Hotels, Motels, Guest Houses and Serviced Apartments	
Rooms Available	5,444
Average Room Occupancy Rate	61.7%
Average Daily Room Rate	\$136.68
Growth (YE Dec 05 on YE Dec 04)	5.0%

(Source: Australian Bureau of Statistics, Survey of Tourist Accommodation, Year Ended December 2005)

## Awareness, Preference and Intention for the Sunshine Coast

- Approximately thirty-nine percent of the Australian population remember having seen, read or heard advertising for the Sunshine Coast. (*Roy Morgan Research Holiday Tracking Survey, Year Ended June 2006*)
- Fifteen percent of respondents interviewed would like to spend a holiday at the Sunshine Coast in the next two years and 6% intend to spend at least one night in the region on their next trip.
- Six percent have spent at least one night at the Sunshine Coast for a holiday or non-business trip in the last 12 months.

## Holiday Attitudes

The following information is from Roy Morgan Research Holiday Tracking Survey Year Ending June 2006 and highlights what makes people who holiday on the Sunshine Coast different to the average Queensland holiday maker.

**TABLE 6 – PEOPLE WHO HOLIDAY ON THE SUNSHINE COAST ARE MORE LIKELY TO....**

	Sunshine Coast Visitors	Total Queensland Visitors
<b>Agree with the following statements</b>		
I like to take holidays away from the crowds	77%	74%
I prefer to holiday where I can see nature or be in a natural setting	76%	73%
I usually book and arrange my holiday details myself	72%	69%
I like to go away on weekends	56%	55%
I sometimes organise holidays on behalf of my family and friends	31%	30%
<b>Describe a Queensland Holiday as</b>		
Somewhere I can have my kind of holiday	53%	48%
Has a great variety of things to do	45%	43%
Gives me a sense of freedom	33%	32%
Gives me a feeling of escape	31%	29%
Has many interesting aspects	25%	24%
<b>Intend to go on the following type of holiday (in the next year)</b>		
A short break to escape the grind	26%	24%
A family holiday where I can relax and the kids are occupied	14%	13%
A holiday where I can undertake some active outdoor pursuits	12%	11%
<b>Want to holiday in the following locations (in the next 2 years)</b>		
The Sunshine Coast	58%	29%
The Whitsundays	20%	18%
Fraser Island	12%	7%
Toowoomba and the Darling Downs	7%	5%
<b>Have participated in the following activities on their last holiday</b>		
Shopping	34%	31%
Beach holiday	30%	21%
Surfing or swimming	30%	24%
Restaurants, international food or wine	30%	26%
Country, wildlife or scenery	19%	17%
National Parks or forest	19%	17%
Gardens or parks	17%	16%
Bushwalking	13%	12%
Zoo, sanctuary or animal parks	12%	10%

**TABLE 7 – PEOPLE WHO HOLIDAY ON THE SUNSHINE COAST LESS LIKELY TO....**

	Sunshine Coast Visitors	Total Queensland Visitors
<b>Agree with the following statements</b>		
I am always very active on holidays	44%	48%
I enjoy holidays where everything is organised for you	20%	23%
For my next holiday I'd really like a total ecotourism experience	18%	16%
I avoid staying at accommodation that does not have genuine environmental policies	14%	15%
I prefer the bright lights and big cities when I travel	11%	14%
<b>Describe a Queensland Holiday as</b>		
Gives me the feeling of adventure	18%	20%
<b>Want to holiday in the following locations (in the next 2 years)</b>		
Gold Coast	29%	30%
Far North Queensland	20%	21%
Brisbane	11%	15%
Northern Queensland	7%	8%
<b>Have participated in the following activities on their last holiday</b>		
Visiting friends and relatives	45%	48%
Attend a special event or festival	15%	18%
Visit a theme or entertainment park	6%	9%

## OVERVIEW OF FINDINGS



Table 6 summarises the key findings from the June 2004, 2005 and 2006 Caloundra Visitor Surveys.

**TABLE 6 – SUMMARY OF KEY RESULTS (ALL RESPONDENTS)**

	June 2004	June 2005	June 2006
Where do they come from?	71% Queensland (44% Brisbane)	57% Queensland (41% Brisbane)	49% Queensland (30% Brisbane)
Who do they travel with?	36% adult couple	44% adult couple	43% adult couple
What is their annual household income?	45% earn less than \$60,000	59% earn less than \$60,000	58% earn less than \$60,000
What is their age?	22% 35 to 44 years	21% 55 to 64 years	20% 35 to 44 years
What motivated them to visit?	N/A	91% to relax and rejuvenate	82% to relax and rejuvenate
What information sources did they use to plan their trip?	N/A	N/A	48% had prior knowledge of the area
Do they recall seeing advertising?	33% recalled seeing advertising	30% recalled seeing advertising	29% recalled seeing advertising
Why did they visit?	71% holiday or leisure purposes	73% holiday or leisure purposes	68% holiday or leisure purposes
How many times had they visited in the past three years?	57% 4 or more times	40% 4 or more times	40% 4 or more times
How long did they stay?	N/A	66% stayed at least one night. Of those 26% stayed 5 to 7 nights	65% stayed at least one night. Of those 29% 5 to 7 nights
What accommodation did they use?	N/A	49% rented apartment or flat	35% rented apartment or flat
Where was their accommodation located?	N/A	N/A	29% Kings Beach
How did they book their accommodation?	N/A	21% booked directly before leaving home	25% booked direct before leaving home
Where else did they go?	63% Sunshine Coast Hinterland 36% Maroochydore	43% Maroochydore 35% Mooloolaba	45% Mooloolaba 44% Maroochydore
What activities did they do?	75% went on a walk	94% went to the beach	78% went to the beach
What were they most satisfied with?	94% beaches; 93% friendliness of locals	95% beaches; 95% friendliness of locals	96% beaches; 89% friendliness of locals
What were they most dissatisfied with?	42% availability of public transport	22% nightlife or entertainment	26% nightlife or entertainment
What appealed to them the most?	N/A	N/A	82% beaches
What improvements did they suggest?	N/A	N/A	28% less or restrict development or commercialisation
Do they intend to return?	82% intend to return	79% intend to return	70% intend to return

N/A – Information not available

Base: June 2004 (n=421)

Base: June 2005 (n= 203)

Base: June 2006 (n= 317)

When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

Table 7 provides a summary of the June 2006 findings when respondents are separated into two groups, those that stayed in Caloundra two nights or less and those that stayed in Caloundra three nights or more.

**TABLE 7 – SUMMARY OF RESULTS BY LENGTH OF STAY**

	<b>2 nights or less</b>	<b>3 nights or more</b>
<b>Where do they come from?</b>	44% Brisbane	21% New South Wales
<b>Who do they travel with?</b>	43% adult couple	44% adult couple
<b>What is their annual household income?</b>	54% earn less than \$60,000	61% earn less than \$60,000
<b>What is their age?</b>	24% 35 to 44 years 18% 25 to 34 years	21% 55 to 64 years 18% 45 to 54 years
<b>What motivated them to visit?</b>	78% to relax and rejuvenate	87% to relax and rejuvenate
<b>What information sources did they use to plan their trip?</b>	51% had prior knowledge of the area	47% had prior knowledge of the area
<b>Why did they visit?</b>	63% holiday or leisure purposes; 18% friends/relatives	73% holiday or leisure purposes; 20% friends/relatives
<b>How many times had they visited in the past three years?</b>	49% 4 or more times	36% 1 to 3 times
<b>What accommodation did they use?</b>	23% hotel or resort; 23% friends or relatives property	39% rented apartment or flat
<b>Where was their accommodation located?</b>	28% Golden Beach	30% Kings Beach
<b>How did they book their accommodation?</b>	27% did not book ahead and just arrived	29% booked direct with accommodation before leaving home
<b>Where else did they go?</b>	36% Maroochydore 35% Mooloolaba	55% Mooloolaba 53% Maroochydore
<b>What activities did they do?</b>	71% went to the beach	89% went to the beach
<b>What were they most satisfied with?</b>	95% beaches; 90% friendliness of locals	97% beaches; 90% lots to see and do
<b>What were they most dissatisfied with?</b>	34% nightlife or entertainment	21% nightlife or entertainment
<b>What appealed to them the most?</b>	79% beaches	85% beaches
<b>What improvements did they suggest?</b>	28% less or restrict development or commercialisation	30% less or restrict development or commercialisation
<b>Do they intend to return?</b>	68% intend to return	71% intend to return

Base: Two nights or less (n=154)

Base: Three nights or more (n=161)

Table 8 provides a summary of the June 2006 findings when respondents are separated into two groups, those from South East Queensland and those from the rest of Australia.

Please note that for the purpose of this report South East Queensland refers to the areas encompassed by the Sunshine Coast, Brisbane and the Gold Coast.

**TABLE 8 – SUMMARY OF RESULTS BY ORIGIN**

	South East Queensland	Rest of Australia
Who do they travel with?	42% adult couple	42% adult couple
What is their annual household income?	65% earn less than \$60,000	60% earn less than \$60,000
What is their age?	41% 25 to 44 years	41% 45 to 64 years
Did they recall any advertising?	33% recalled seeing advertising	30% recalled seeing advertising
What motivated them to visit?	85% to enjoy the peace and quiet of a uncrowded destination	88% to relax and rejuvenate
What information sources did they use to plan their trip?	65% had prior knowledge of the area	39% had prior knowledge of the area
Why did they visit?	67% holiday or leisure purposes	71% holiday or leisure purposes
How many times had they visited in the past three years?	68% 4 or more times	41% 1 to 3 times
How long did they stay?	56% were on a day trip	85% stayed overnight
What accommodation did they use?	33% friends or relatives property	38% rented apartment or holiday flat
Where was their accommodation located?	27% Golden Beach	26% Kings Beach
How did they book their accommodation?	28% booked direct with accommodation before leaving home	26% booked direct with accommodation before leaving home
Where else did they go?	24% Mooloolaba 23% Maroochydore	61% Mooloolaba 61% Maroochydore
What activities did they do?	73% went to the beach 55% went to a café or coffee shop	87% went to the beach 76% went to a café or coffee shop
What were they most satisfied with?	96% beaches 90% lots to see and do	97% beaches 93% visitor information centres – quality of service
What were they most dissatisfied with?	36% nightlife or entertainment	21% nightlife or entertainment
What appealed to them the most?	82% beaches	80% beaches
What improvements did they suggest?	28% less or restrict development or commercialisation	32% less or restrict development or commercialisation
Do they intend to return?	88% intend to return	71% intend to return

Base: South East Queensland (n=126)

Base: Rest of Australia (n=124)

Table 9 provides a summary of the June 2006 findings when respondents are separated into two groups, those that are 18 to 44 years of age and those that are 45 years of age and over.

**TABLE 9 – SUMMARY OF RESULTS BY AGE**

	18-44 years of age	45 years and over
Where do they come from?	31% Brisbane	28% Brisbane
Who do they travel with?	31% family group 26% adult couple	61% adult couple 17% alone
What is their annual household income?	55% earn under \$60,000	60% earn under \$60,000
What motivated them to visit?	80% to relax and rejuvenate	85% to relax and rejuvenate
What information sources did they use to plan their trip?	46% had prior knowledge of the area	51% had prior knowledge of the area
Do they recall seeing any advertising for Caloundra	20% recalled seeing advertising	37% recalled seeing advertising
Why did they visit?	65% holiday or leisure purposes	72% holiday or leisure purposes
How many times had they visited in the past three years?	44% 4 or more times	35% 4 or more times
How long did they stay?	43% were on a day trip	28% were on a day trip
What accommodation did they use?	31% rented apartment or flat	38% rented apartment or flat
Where was their accommodation located?	28% Kings Beach 22% Bulcock Beach	29% Kings Beach 18% Bulcock Beach
How did they book their accommodation?	26% booked direct with accommodation before leaving home; 26% used the internet to find and book accommodation	24% booked direct with accommodation before leaving home
Where else did they go?	43% Mooloolaba 41% Maroochydore	48% Mooloolaba 47% Maroochydore
What activities did they do?	78% went to the beach	82% went to the beach
What were they most satisfied with?	97% beaches	95% beaches
What were they most dissatisfied with?	33% nightlife or entertainment	13% availability of public transport
What appealed to them the most?	81% beaches	83% beaches
What improvements did they suggest?	28% less or restrict development or commercialisation	32% less or restrict development or commercialisation
Do they intend to return?	71% intend to return	70% intend to return

Base: 18 to 44 years (n=152)

Base: 45 years and over (n=157)

## RESPONDENT PROFILE



## Overview

- 43% of respondents travelled to Caloundra as part of a couple.
- The annual household income of most respondents was under \$80,000.
- A slightly higher proportion of respondents were female.
- The greatest proportion of respondents were aged between 35 and 54 years.
- Approximately half of all respondents originated from Queensland.

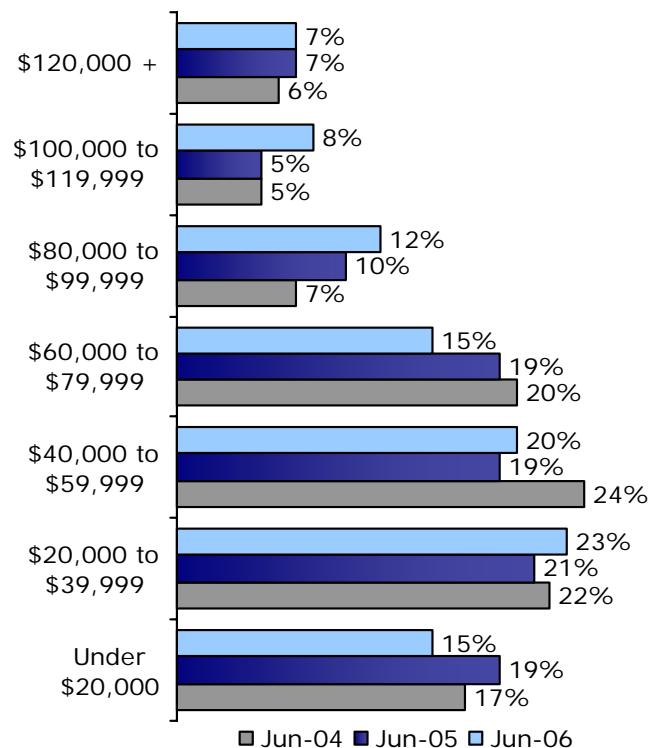
## What is their annual household income?

The majority of respondents in all three waves of the Caloundra Visitor Survey had an annual household income under \$80,000.

One fifth of respondents in June 2006 and June 2005 had an annual household income of between \$20,000 and \$39,999.

In June 2004, one fifth of respondents had an annual household income of \$40,000 to \$59,999.

**FIGURE 4 – ANNUAL HOUSEHOLD INCOME BY WAVE**



Base: June 2004 (n=293); June 2005 (n=134); June 2006 (n = 208)

When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

**TABLE 10 – TRAVEL PARTY BY WAVE**

Travel Party	June 2004	June 2005	June 2006
An adult couple (partners in a relationship)	36%	44%	43%
Family group (parents & children)	29%	23%	23%
Yourself travelling alone	7%	13%	20%
Friends/relatives travelling together without children	13%	12%	8%
Friends/relatives travelling together with children	10%	5%	5%
Other	3%	5%	1%

Base: June 04 (n=418); June 05 (n=200); June 06 (n=312).

Top 3 responses for each wave are highlighted.

When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

**TABLE 11 – TRAVEL PARTY BY AGE**

Travel Party	18-44 years	45 years & over
Family group (parents & children)	31%*	16%
An adult couple (i.e. partners in a relationship)	26%	61%*
Yourself travelling alone	23%	17%
Friends/relatives travelling together without children	12%*	3%
Friends/relatives travelling together with children	7%	3%
Independent adults in group (no children)	1%	0%
Other	0%	0%

Base: June 2006, 18-44 years (n=151); 45 years and over (n=157).

Top 3 responses highlighted. \* - Denotes significantly larger proportion

Adult couples were more likely to be 45 years or over whereas family groups and friends and relatives travelling together without children were more likely to be 18 to 44 years of age.

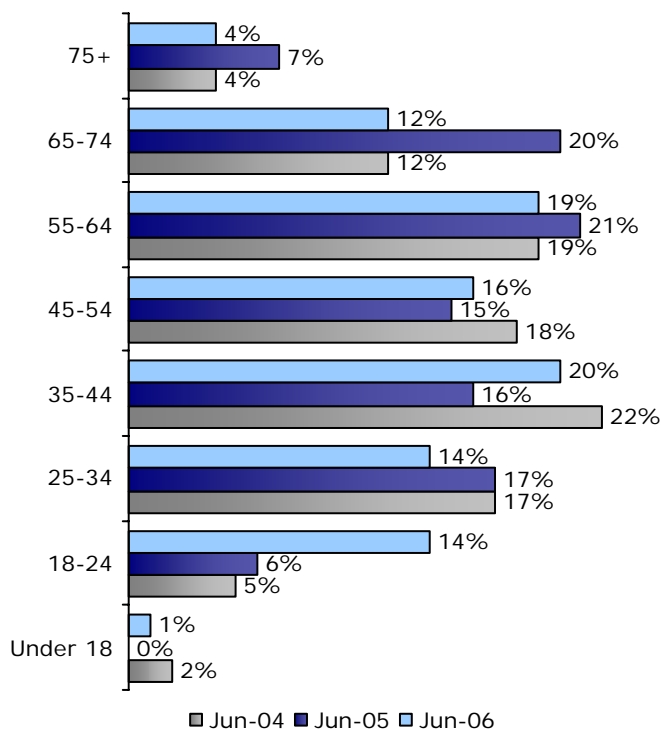
## What is their gender?

A higher proportion of females were interviewed (55%).

## What is their age?

In the June 2004 and June 2006 waves the largest proportion of respondents were aged 35 to 54 years (40% and 36% respectively). In June 2005 the greatest proportion of respondents were aged 55 to 74 years (41%).

**FIGURE 5 – AGE BY WAVE**



Base: June 2004 (n=413); June 2005 (n=199); June 2006 (n=312)  
When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

## Where do they come from?

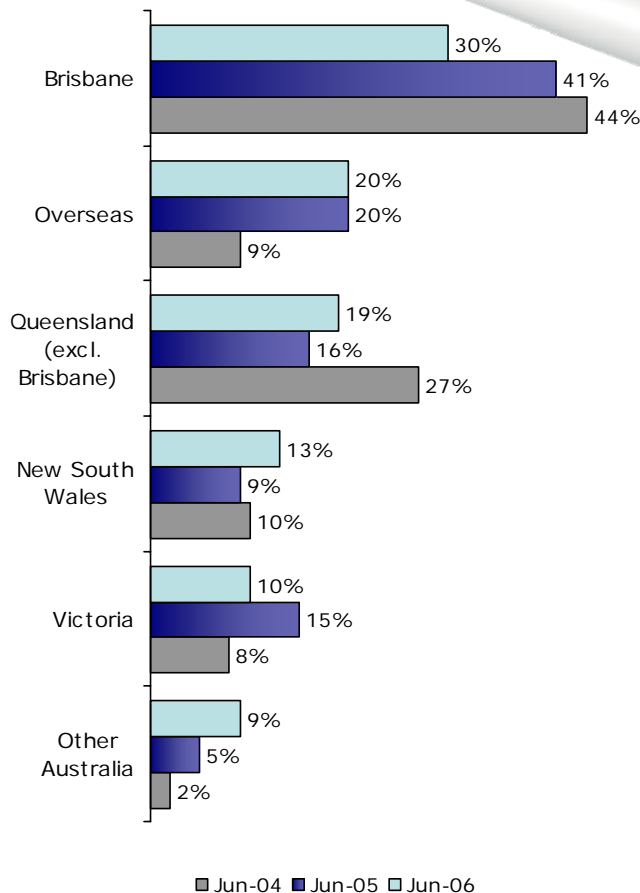
In June 2006 30% of respondents were from Brisbane, while a further 20% originated from overseas. Nineteen percent of respondents originated from Queensland (excluding Brisbane) and 13% were from New South Wales.

Of those respondents who originated from Brisbane, one third were from the Northern suburbs of Brisbane (32%) and 15% were from the Caboolture Shire. A further 12% of respondents originated from the Southern suburbs of Brisbane.

Across all waves respondents from Brisbane consistently represent the largest proportion of visitors surveyed.

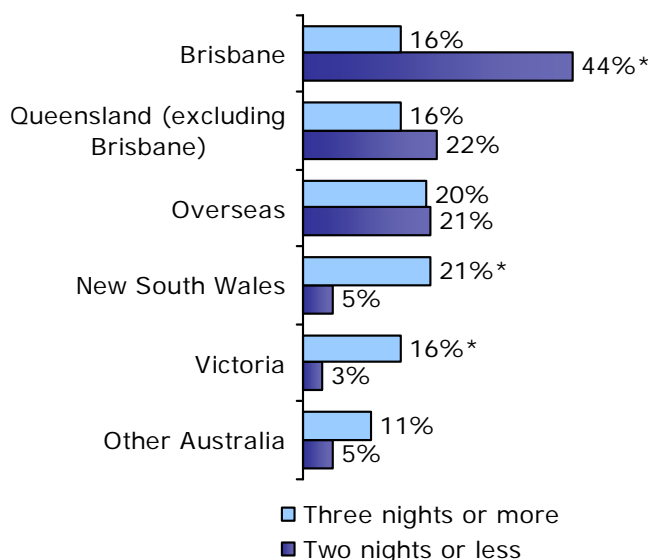
Refer to Appendix A for detailed information on the breakdown of Caloundra visitors from the Brisbane region.

**FIGURE 6 – ORIGIN BY WAVE**



Base: June 2004 (n=406); June 2005 (n=201); June 2006 (n=314)  
When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

**FIGURE 7 – ORIGIN BY LENGTH OF STAY**



Base: Two nights or less (n=153); Three nights or more (n=160)  
\* - Denotes significantly larger proportion

Respondents originating from Brisbane were more likely to be staying in Caloundra for two nights or less.  
Respondents from New South Wales or Victoria were more likely to be staying three nights or more in Caloundra.

## MOTIVATION FOR TRIP



## Overview

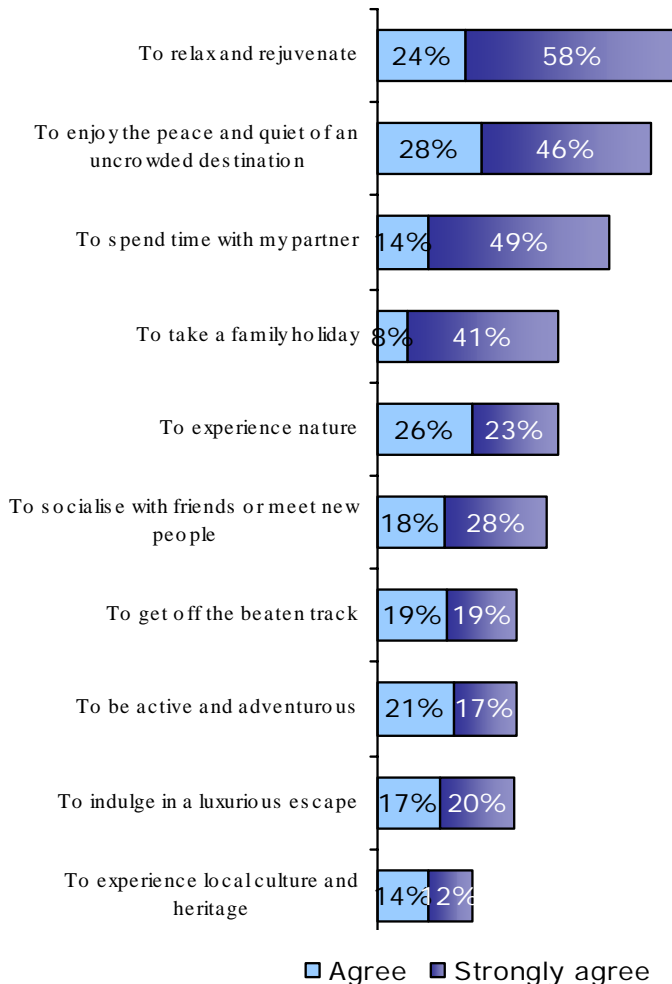
Most respondents were motivated to visit Caloundra to relax and rejuvenate (82%) or to enjoy the peace and quiet of an uncrowded destination (74%).

## What motivated them to visit?

Respondents were asked about motivations for their trip to Caloundra. The question asked respondents to rate 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. Data shown in this report represents the proportion of respondents who stated they either agree or strongly agree with each statement.

The most common motivations for taking the trip to Caloundra were to relax and rejuvenate, to enjoy the peace and quiet of an uncrowded destination and to spend time with my partner. These were also to top three trip motivation statements in June 2005.

**FIGURE 8 – MOTIVATIONS**



Base varies for each statement: June 2006, (n=294 to 300).  
Data represents proportion of respondents who stated they either agree or strongly agree with each statement

When examining how strongly respondents agree with motivation statements, results are similar regardless of age, origin, or length of stay. The few exceptions to this include:

- To relax and rejuvenate was a more common motivation for those staying three or more nights than those staying two nights or less (87%\* and 78% respectively).
- Respondents aged 45 years or over were more likely to be motivated by the following aspects than those aged 18 to 44 years: to visit to enjoy the peace and quiet of an uncrowded destination (83%\* and 65% respectively), to spend time with their partner (72%\* and 56%\* respectively) and to experience nature (55%\* and 43% respectively).
- Respondents motivated to visit Caloundra to take a family holiday were more likely to be staying for three or more nights than on a shorter stay (66%\* and 31% respectively).
- Respondents from South East Queensland were less likely to cite the following motivational aspects, compared with those from other areas in Australia: "to take a family holiday" (38% and 66%\* respectively), "to indulge in a luxurious escape" (28% and 43%\* respectively) and "to experience local culture and heritage" (14% and 28%\* respectively).

\* - Denotes significantly larger proportion

## INFORMATION SOURCES AND ADVERTISING



## Overview

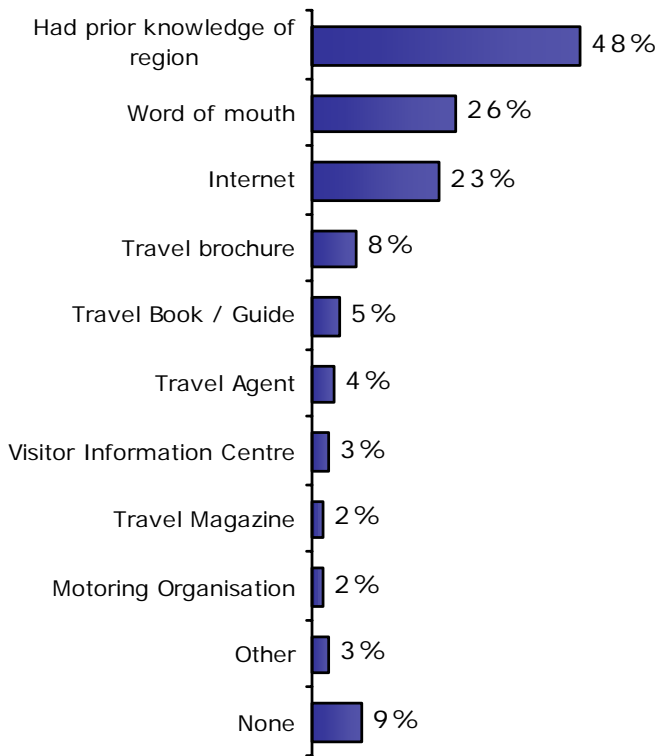
- Almost half of respondents used their prior knowledge of Caloundra when planning their trip
- Word of mouth and the internet were the most common information sources used
- Nearly two thirds of respondents did not recall seeing any advertising for Caloundra prior to their trip.

## What information sources did they use to plan their trip?

The greatest proportion of respondents indicated they had prior knowledge of Caloundra (48%).

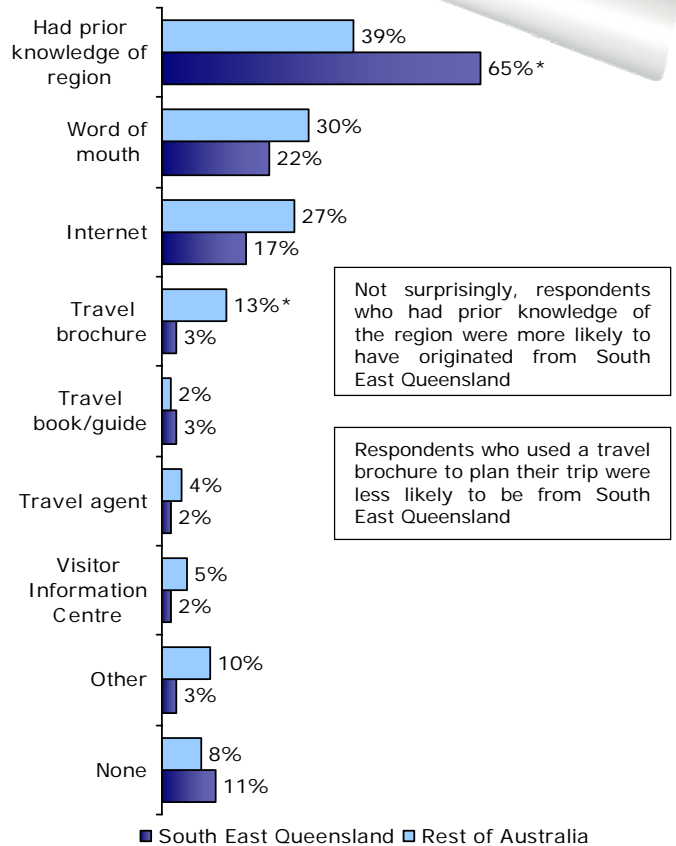
The most common information sources respondents used when planning their trip to Caloundra were word of mouth and the internet.

**FIGURE 9 – INFORMATION SOURCES**



Base: June 2006 (n=313). Multiple responses accepted

**FIGURE 10 – INFORMATION SOURCES BY ORIGIN**

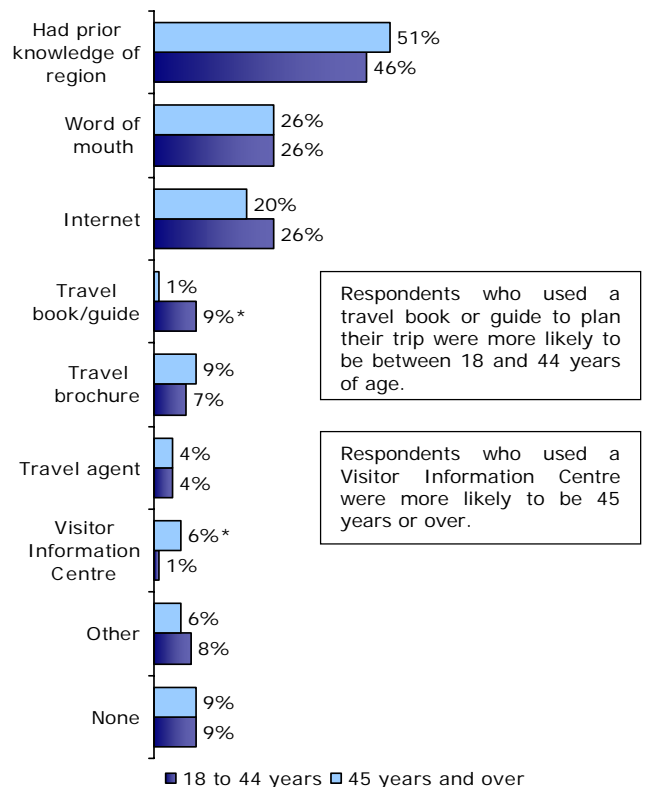


Not surprisingly, respondents who had prior knowledge of the region were more likely to have originated from South East Queensland

Respondents who used a travel brochure to plan their trip were less likely to be from South East Queensland

Base: Queensland (n= 125); Rest of Australia (n= 123). Multiple responses accepted. \* - Denotes significantly larger proportion

**FIGURE 11 – INFORMATION SOURCES BY AGE**



Respondents who used a travel book or guide to plan their trip were more likely to be between 18 and 44 years of age.

Respondents who used a Visitor Information Centre were more likely to be 45 years or over.

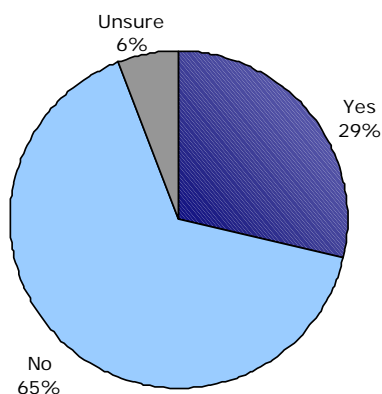
Base: 18 to 44 years (n=150); 45 years and over (n=156).

Multiple responses accepted. \* - Denotes significantly larger proportion

## Do they recall seeing advertising?

Respondents were asked whether they recalled seeing any advertising for the Caloundra region before leaving home. Two thirds of respondents did not recall seeing advertising before leaving home (65%). Twenty-nine percent of respondents did recall seeing advertising for the Caloundra region.

**FIGURE 12 – ADVERTISING RECALL**



Base: June 2006 (n = 315)

The proportion of respondents that recall seeing advertising for the Caloundra region before leaving home has remained fairly consistent since June 2004.

**TABLE 15 – ADVERTISING RECALL BY WAVE**

Advertising Recall	June 2004	June 2005	June 2006
Yes	33%	30%	29%
No	65%	69%	66%
Unsure	2%	1%	6%

Base: June 2004 (n=420), June 2005 (n= 200), June 2006 (n= 315)

When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

## DETAILS OF TRIP



## Overview

- The majority of respondents were travelling for holiday or leisure purposes
- Approximately two thirds were in Caloundra on an overnight stay
- One third stayed in a rented apartment or holiday flat
- Two thirds booked their accommodation direct or used the internet
- Kings Beach, Bulcock Beach and Golden Beach were the most popular accommodation locations
- Almost half of respondents visited Mooloolaba during their trip
- Going to the beach was the most popular activity

## Why did they visit?

Across all three waves the greatest proportion of respondents travelled to Caloundra for holiday or leisure purposes.

**TABLE 16 – MAIN PURPOSE OF VISIT BY WAVE**

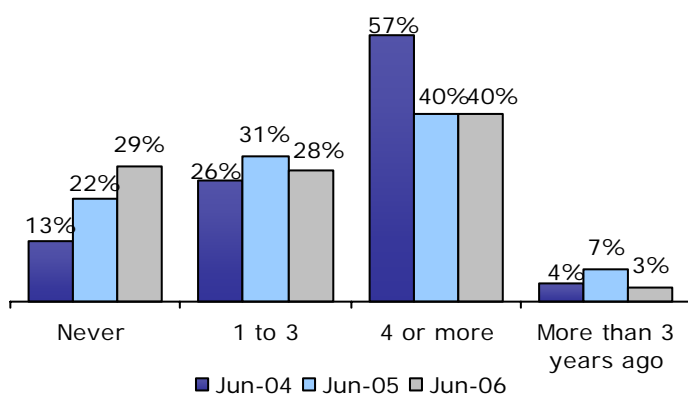
Main purpose of visit	June 2004	June 2005	June 2006
Holiday/leisure	71%	73%	68%
Visiting friends or relatives	18%	18%	20%
Business/employment/training	6%	3%	5%
Other	6%	6%	8%

Base: June 2004 (n=421); June 2005 (n=202); June 2006 (n=312)  
When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

## How many times have they visited in the past 3 years?

The majority of respondents across all three waves of the survey were on a return visit to Caloundra.

**FIGURE 13 – PREVIOUS VISITATION BY WAVE**



Base: June 2004 (n=420); June 2005 (n=201); June 2006 (n=312)  
When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

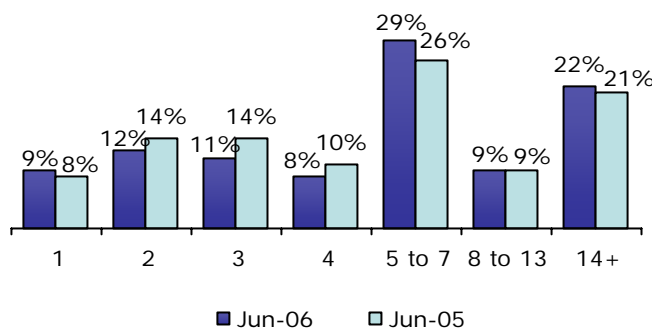
The greatest proportion of respondents, who have visited Caloundra four or more times in the past three years were from South East Queensland. Conversely, those who have visited less than four times were less likely to have originated from South East Queensland.

## How long did they stay?

The majority of respondents stayed at least one night in Caloundra (65%), while about one third were on a daytrip (35%). Similar results were shown in the June 2005 wave with 66% of respondents staying overnight and 34% on daytrips.

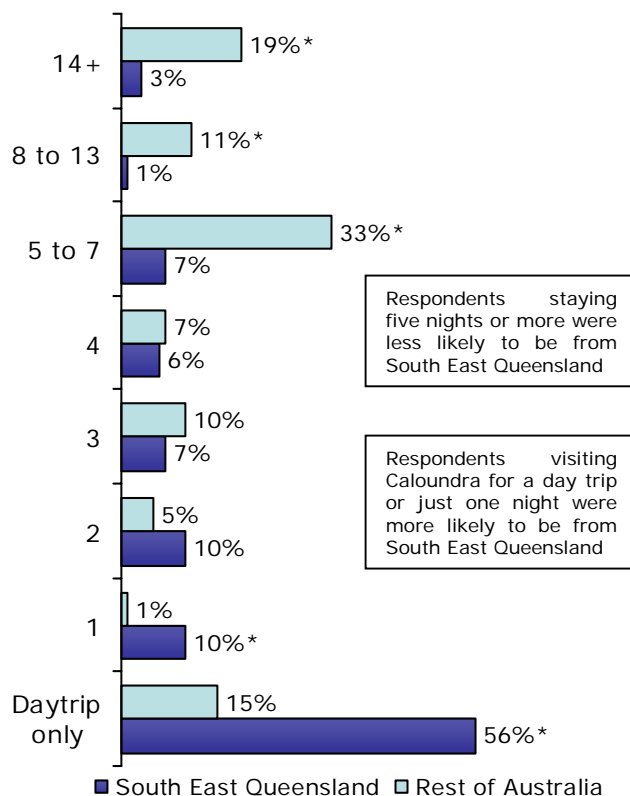
Respondents who stayed for at least one night were asked how many nights they were spending in Caloundra. In both waves the majority of respondents stayed five nights or more.

**FIGURE 14 – LENGTH OF STAY (NIGHTS) BY WAVE**



Base: Overnight respondents; June 2006 (n=204), June 2005 (n=199)

**FIGURE 15 – LENGTH OF STAY (NIGHTS) BY ORIGIN**



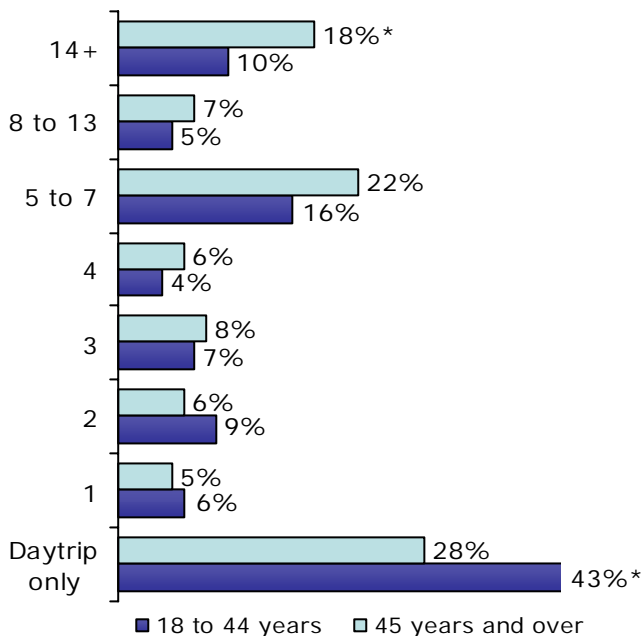
Respondents staying five nights or more were less likely to be from South East Queensland

Respondents visiting Caloundra for a day trip or just one night were more likely to be from South East Queensland

Base: South East Queensland (n=117); Rest of Australia (n=96)

\* - Denotes significantly larger proportion

**FIGURE 16 – LENGTH OF STAY (NIGHTS) BY AGE**



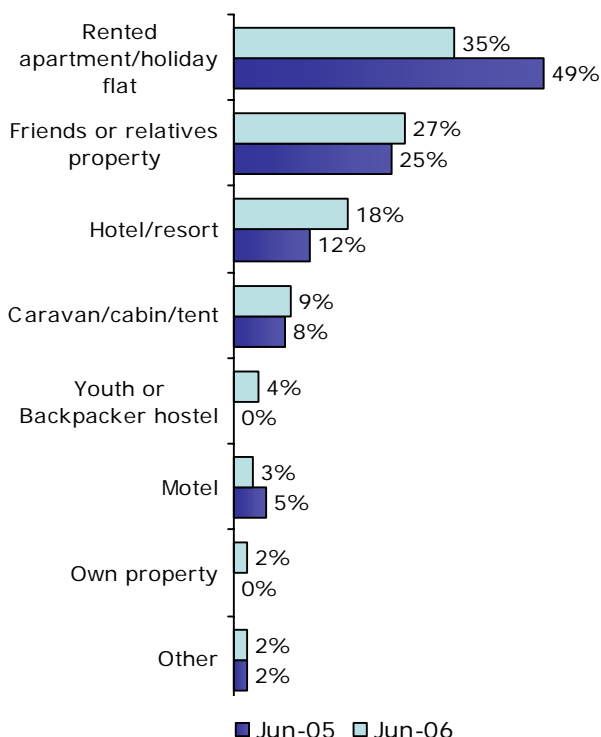
Base: June 2006 18 to 44 years (n=152); 45 years and over (n=156)  
 \* - Denotes significantly larger proportion

Respondents on a daytrip are more likely to be 18-44 years of age, while those who stay for 14 nights or more are more likely to be aged 45+.

### What accommodation did they use?

One third stayed in a rented apartment or holiday flat (35%), with a further 28% staying at a friend's or relative's property.

**FIGURE 17 – ACCOMMODATION USED**



Base: Overnight respondents - June 2006 (n= 202); June 2005 (n=134)

### How did they book their accommodation?

The greatest proportion used one of three methods: booked direct with accommodation before leaving home (25%), used the internet to find and book accommodation (17%), or booked direct with accommodation because they had stayed there before (16%). Ten percent of respondents did not book their accommodation ahead of arriving in Caloundra.

### Did they book through a discount internet site?

Of those respondents who booked their accommodation through the internet 50% booked through a discount internet site such as wotif.com. Forty-four percent did not book through a discount internet site.

**TABLE 17 – ACCOMMODATION BOOKING METHOD**

Accommodation Booking Method	June 2005	June 2006
Booked direct with accommodation before leaving home	21%	25%
I used the internet to find and book accommodation	8%	17%
Booked direct with accommodation because I have stayed there before	15%	16%
I used the internet to find accommodation and phoned them to book	4%	10%
Did not book ahead, just arrived	17%	10%
Booked through a travel agent	15%	7%
Real Estate	4%	0%
Work or business organised	4%	4%
Friend/family booked	3%	3%
Other	8%	10%

Base: Respondents who stayed in commercial accommodation in Caloundra, June 2005 (n=99); June 2006 (n=134).  
 Top 3 responses for each wave highlighted.

Respondents on a short break (staying two nights or less) were less likely to book prior to arriving than those staying 3 nights or more (27%\* and 6% respectively). Conversely, those staying 3 nights or more were more likely to book direct before leaving home than those on a short break (29%\* and 8% respectively).

A higher proportion of respondents aged 18 to 44 years used the internet to find and book their accommodation than those aged 45 years or older (26%\* and 12% respectively).

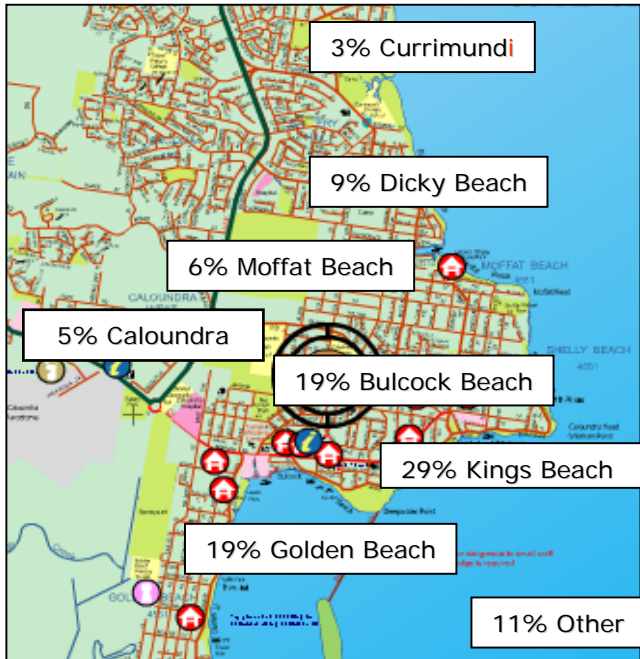
A greater proportion of respondents aged 45 or over booked direct with their accommodation as they had stayed there before, compared with those aged 18 to 44 years (22%\* and 7% respectively).

\* - Denotes significantly larger proportion

## Where was their accommodation located?

The greatest proportion of respondents stayed at Kings Beach (29%). Nineteen percent of respondents stayed at Bulcock Beach and a further 19% of respondents stayed in accommodation located at Golden Beach.

**FIGURE 18 – ACCOMMODATION LOCATION**



Base: Respondents who stayed overnight in Caloundra, June 2006 (n = 198).  
Map Source: <http://www.driveqld.com.au>

**TABLE 18 SATISFACTION WITH ACCOMMODATION**

Accommodation aspect	n	Total dissatisfied	Total satisfied
Overall	124	1%	82%
Value for money	125	2%	81%
Service	113	4%	81%

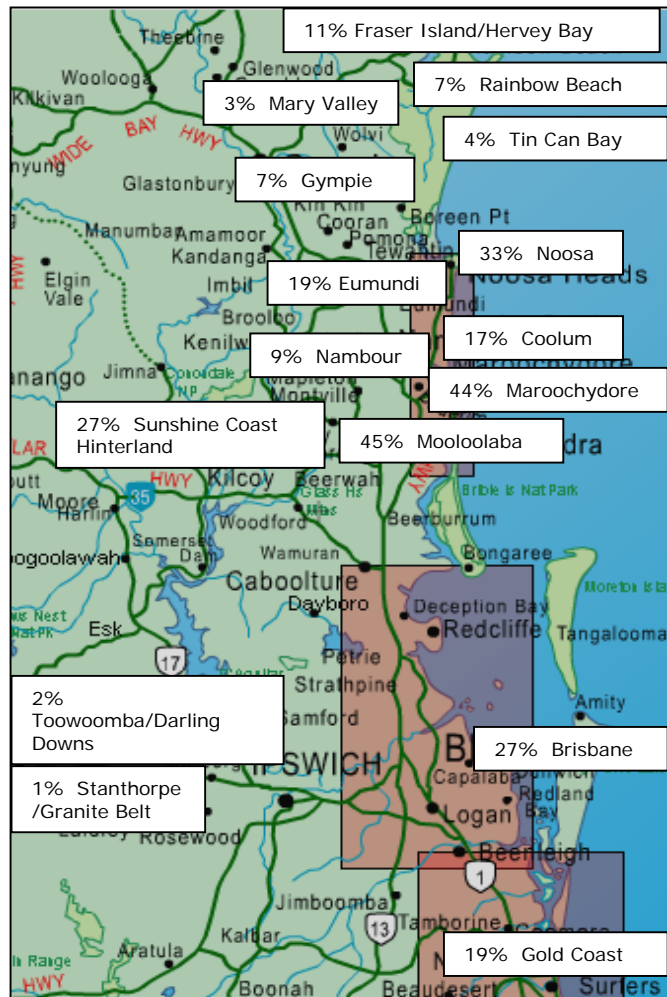
Base: Varies for each statement; June 2006 (n=113 to 125)

Responses were measured on a five-point scale, where one equalled very dissatisfied and five equalled very satisfied. Percentages show for 'total dissatisfied' comprise of all respondents that rated each aspect either a one or a two. Percentages shown for 'total satisfied' comprise all respondents that rated each aspect a four or a five.

## Where else did they go?

Respondents were asked which of a number of places they had visited or planned to visit on their current trip (apart from passing through). Forty-five percent of respondents indicated that they had visited or planned to visit Mooloolaba, while 44% had visited or planned to visit Maroochydore. About a third of respondents indicated that they had visited or planned to visit Noosa, during their trip (33%). Mooloolaba and Maroochydore were also the most popular places for June 2005 respondents to visit while on their trip to Caloundra (see Table 19).

**FIGURE 19 – PLACES VISITED ON CURRENT TRIP**



Base: June 2006 (n=317). Multiple responses accepted

**TABLE 19 – PLACES VISITED BY WAVE**

Places Visited	June 2004	June 2005	June 2006
Mooloolaba	34%	35%	45%
Maroochydore	36%	43%	44%
Noosa	24%	28%	33%
Sunshine Coast Hinterland	63%	34%	27%
Brisbane	20%	23%	27%
Eumundi	22%	21%	19%
Gold Coast	15%	14%	19%
Coolum	17%	19%	17%
Fraser Island/Hervey Bay	8%	7%	11%
Nambour	18%	10%	9%
Gympie	9%	6%	7%
Rainbow Beach	7%	5%	7%
Tin Can Bay	n/a	n/a	4%
Gympie	9%	6%	7%
Mary Valley	N/A	N/A	3%
Toowoomba/Darling Downs	N/A	N/A	2%
Stanthorpe/Granite Belt	N/A	N/A	1%

Base: June 2004: (n=421); June 2005 (n=203); June 2006 (n=317). Multiple responses accepted. Top three responses for each wave highlighted. When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

Respondents 45 years and over, those staying three nights or more or those originating from the rest of Australia, were more likely to visit other areas of the Sunshine Coast during their trip.

### What activities did they do?

Across all three waves, going to the beach has been the most popular activity. Going to a café or coffee shop also continues to rate in the top three activities across waves.

Differences in activity participation rates between waves may be due to variation in interviewing locations. For example, the apparent decline in visitation to Mary Cairncross Park may be due to the removal of Hinterland interview locations in the January 2006 and 2005 waves of the research.

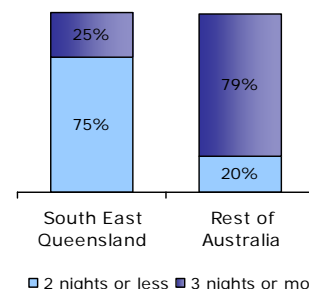
**TABLE 20 – ACTIVITIES PARTICIPATED IN BY WAVE**

Activity	June 2004	June 2005	June 2006
Go to the Beach	52%	94%	80%
Go to a café/coffee shop	64%	67%	66%
Go on a walk	75%	86%	65%
Go shopping	53%	60%	59%
Eat at a restaurant	39%	55%	56%
Visit friends/relatives	46%	37%	35%
Visit the markets	39%	37%	29%
Visit Australia Zoo	13%	15%	23%
The Glasshouse Mountains	21%	24%	17%
Go fishing	9%	17%	17%
Visit an art/craft gallery	27%	17%	14%
Watersports	8%	13%	14%
Go on a boat/cruise	9%	12%	12%
Visit Aussie World/Ettamogah Pub	9%	6%	9%
Visit a national park	15%	12%	8%
Visit the Big Kart Track	3%	1%	7%
Visit a winery	10%	5%	6%
Visit Mary Cairncross Park	44%	8%	4%
Visit a museum	7%	7%	4%
Play golf	4%	7%	3%
None of the above	N/A	N/A	2%

Base: June 2004 (n=420); June 2005 (n=203); June 2006 (n=308). Multiple responses accepted. Top 3 responses for each wave highlighted. N/A – Information not available

Respondents who stayed three or more nights or originated from the rest of Australia, were more likely to participate in a greater number of activities during their stay in Caloundra. This could be because 79% of all respondents that originated from the rest of Australia stayed three or more nights in Caloundra (see figure 20 below), thereby giving them time to explore the region more extensively than those on a shorter break.

**FIGURE 20 VISITATION BY ORIGIN**



Base: South East Queensland (n=126); Rest of Australia (n=123)

## SATISFACTION, APPEALS AND IMPROVEMENTS



## What were respondents most satisfied with?

Respondents were asked to rate their satisfaction with various aspects of Caloundra. Responses were measured on a five-point scale, where one equalled very dissatisfied and five equalled very satisfied. Percentages shown for 'Total dissatisfied' comprise all respondents that rated each aspect either a one or a two. Percentages shown for 'Total satisfied' comprise all respondents that rated each aspect either a four or a five.

Aspects respondents were most satisfied with included the beaches, the friendliness of the locals, and personal safety or security.

**TABLE 21 – SATISFACTION WITH ASPECTS OF CALOUNDRA - JUNE 2006**

Aspect	N	Total Dissatisfied	Neutral	Total Satisfied
<b>Caloundra overall</b>	<b>294</b>	<b>0%</b>	<b>11%</b>	<b>89%</b>
Beaches	299	0%	4%	96%
Friendliness of locals	290	2%	9%	89%
Personal safety/security	289	2%	11%	87%
Lots to see and do	292	3%	12%	85%
Visitor Information Centres - quality of service	121	3%	14%	83%
Accommodation – overall	124	1%	17%	82%
Accommodation – service	113	4%	15%	81%
Accommodation - value for money	125	2%	18%	81%
Restaurants/cafes – service	231	3%	19%	78%
Restaurants/cafes – overall	227	2%	21%	78%
Attractions – service	137	3%	20%	77%
Restaurants/cafes - value for money	229	3%	21%	77%
Availability of tours	96	2%	22%	76%
Attractions – overall	137	3%	21%	76%
Restaurants/cafes - quality of food	228	4%	21%	75%
Signage	275	5%	22%	73%
Attractions - value for money	137	2%	26%	72%
Shopping – service	232	2%	28%	70%
Restaurants/cafes - opening hours	213	9%	21%	70%
Caloundra CBD Streetscape	275	8%	23%	69%
Shopping – overall	229	2%	33%	65%
Availability of public transport	95	15%	22%	63%
Carpark facilities	267	12%	25%	63%
Shopping – range	231	8%	34%	58%
Nightlife/entertainment	91	26%	27%	46%

The beaches, personal safety and security and the friendliness of the locals in Caloundra consistently received the highest satisfaction ratings in the June 2004, June 2005 and June 2006 waves.

Percentages shown comprise all respondents that rated each aspect either a four (satisfied) or a five (very satisfied) on the satisfaction scale.

**TABLE 22 – TOTAL SATISFIED BY WAVE**

Aspects of Caloundra	June 2004		June 2005		June 2006	
	N	%	N	%	N	%
<b>Caloundra overall</b>	<b>400</b>	<b>94%</b>	<b>197</b>	<b>90%</b>	<b>294</b>	<b>89%</b>
Beaches	346	94%	198	95%	299	96%
Friendliness of locals	382	93%	184	95%	290	89%
Personal safety/security	395	88%	197	93%	289	87%
Lots to see and do	392	87%	184	91%	292	85%
Visitor Information Centres – quality of service	N/A	N/A	N/A	N/A	121	83%
Accommodation – overall	96	88%	94	93%	124	82%
Accommodation – service	87	85%	84	86%	113	81%
Accommodation - value for money	96	88%	92	88%	125	81%
Restaurants/cafes – service	285	84%	145	87%	231	78%
Restaurants/cafes – overall	289	83%	142	89%	227	78%
Attractions – service	184	81%	78	88%	137	77%
Restaurants/cafes – value for money	287	76%	144	83%	229	77%
Availability of tours	83	86%	55	84%	96	76%
Attractions – overall	187	85%	83	82%	137	76%
Restaurants/cafes – quality of food	288	84%	144	82%	228	75%
Signage	388	73%	181	83%	275	73%
Attractions – value for money	188	70%	82	79%	137	72%
Shopping – service	239	78%	130	84%	232	70%
Restaurants/cafes – opening hours	N/A	N/A	140	76%	213	70%
Caloundra CBD Streetscape	311	69%	180	78%	275	69%
Shopping – overall	239	76%	131	82%	229	65%
Availability of public transport	103	33%	52	77%	95	63%
Car park facilities	386	71%	158	78%	267	63%
Shopping – range	248	72%	133	75%	231	58%
Nightlife/entertainment	80	55%	36	53%	91	46%

When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results. Top 3 responses for each wave highlighted. N/A – Information not available

Satisfaction levels were analysed according to respondents age, origin and length of stay. Whilst results did vary across groups, the following aspects showed statistically significant differences:

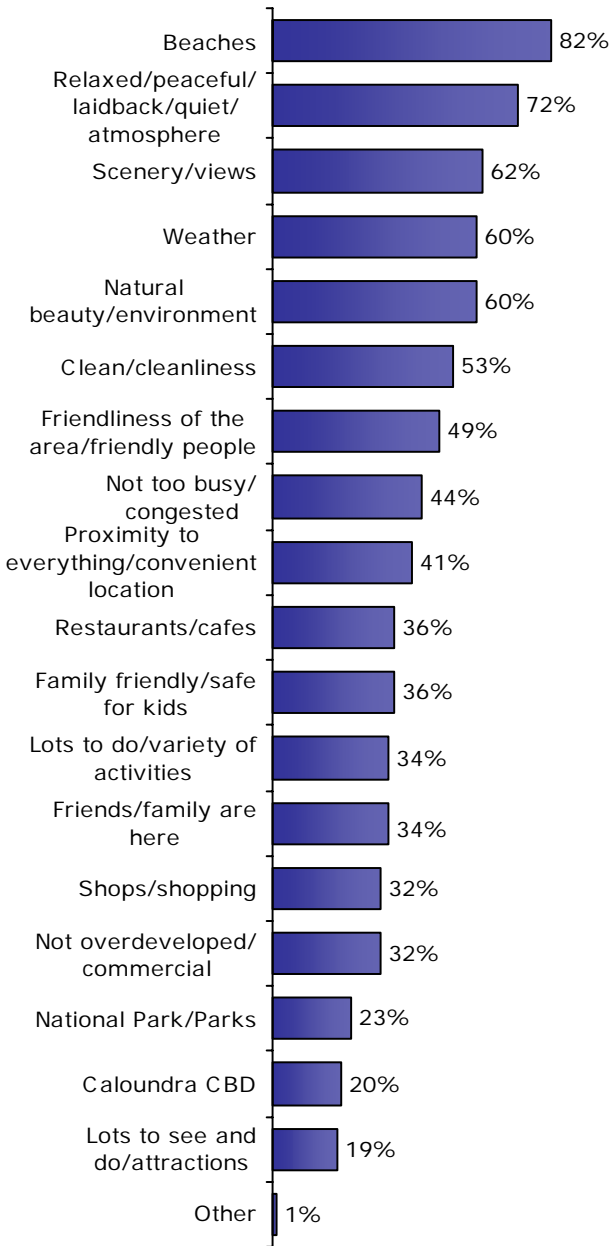
- Respondents were more likely to be satisfied by their their visit to Caloundra overall if they were 45 years of age or more (94%\*) than those under 45 years of age (83%).
- Respondents from South East Queensland were more satisfied with personal safety or security in Caloundra than respondents from the rest of Australia (93%\* and 80% respectively).
- Satisfaction ratings for “lots to see and do” were higher from those staying three nights or more (90%\*), than those in Caloundra on a short break (two nights or less; 79%). Similarly, those aged 45 years or more were more likely to rate “lots to see and do” higher than younger respondents (those under 45 years; 92%\* and 77% respectively).
- Respondents satisfaction with the value for money at restaurants and cafes was more likely to be higher if they were staying in Caloundra three nights or more (83%\*), compared to those on a short break (two nights or less; 70%), and for those aged 45 years or over (83%\*) compared with those aged under 45 (70%).

\* - Denotes significantly larger proportion

## What appealed to them the most?

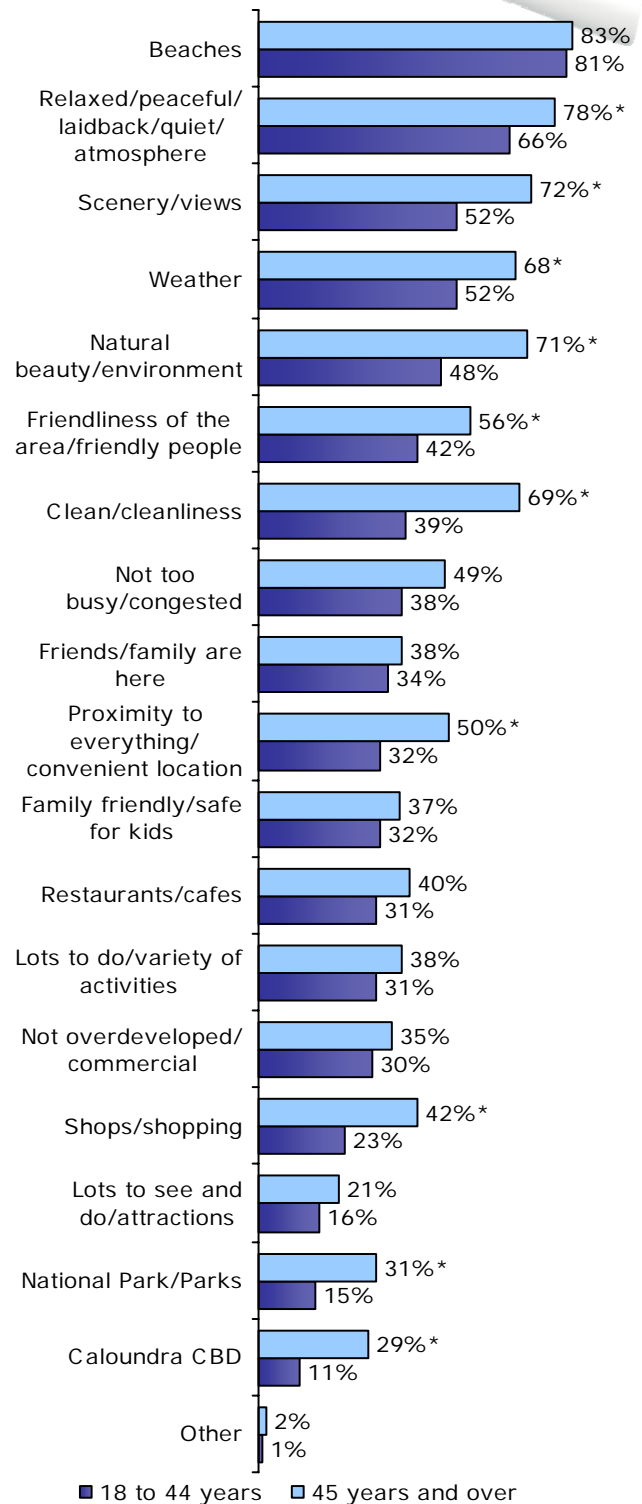
Respondents were asked what aspects of Caloundra appealed to them the most. The most appealing aspect was the beaches (82%) followed by the relaxed, peaceful, laidback and quiet atmosphere (72%), and the scenery or views (62%). Sixty percent of respondents also found the weather appealing.

**FIGURE 21 – APPEALS**



Base: June 2006 (n= 307). Multiple responses accepted.

**FIGURE 22 – APPEALS BY AGE**



Base: 18 to 44 years (n=149), 45 years and over (n=153)  
Multiple responses accepted. \* - Denotes significantly larger proportion

Compared with younger respondents, a higher proportion of respondents 45 years of age or more found the following aspects of Caloundra appealing: relaxed, peaceful, laidback, quiet atmosphere; scenery or views; natural beauty or environment; clean or cleanliness; weather; friendliness of the area or friendly people; proximity to everything or convenient location; shops or shopping; national parks or parks; and Caloundra CBD.

## What improvements did they suggest?

Respondents were asked to indicate what improvements they would like made to make Caloundra more enjoyable for visitors.

The largest proportion of respondents indicated they would like to see less or restricted development or commercialisation (28%). Nineteen percent of respondents agreed that Caloundra needed improved or more parking, while a further 19% suggested that Caloundra needed improved, more or cheaper restaurants and cafes.

In June 2005 the most common suggestion was to restrict development in Caloundra followed by improved or more public facilities, amenities or parks.

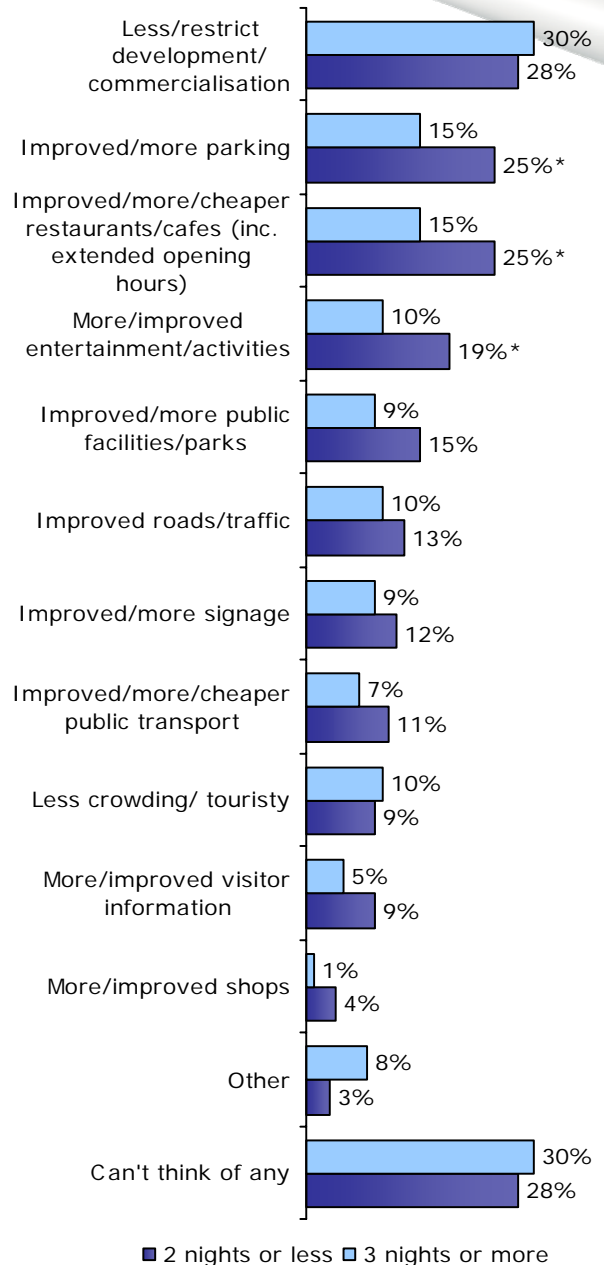
**TABLE 23 – POSSIBLE IMPROVEMENTS**

Improvements	June 2006
Less/restrict development/commercialisation	28%
Improved/more parking	19%
Improved/more/ cheaper restaurants/cafes	19%
More/improved entertainment/activities	14%
Improved/more public facilities	12%
Improved roads/traffic	11%
Improved/more signage	10%
Less crowding/touristy	9%
Improved/more/ cheaper public transport	9%
More/improved visitor information	7%
Other	7%
Can't think of any	28%

Base: June 2006 (n=307). Multiple responses accepted.

A higher proportion of respondents aged 18 to 44 years suggested more or improved entertainment activities than older respondents (45 years or more, 19%\* and 8% respectively).

**FIGURE 23 – IMPROVEMENTS BY LENGTH OF STAY**



Base: June 2006, 2 nights or less (n= 148); 3 nights or more (n=155). Multiple responses accepted. \* - Denotes significantly larger proportion

Respondents who indicated that the following improvements would make Caloundra more enjoyable for visitors were more likely to have been staying for 3 nights or more: improved or more parking; improved or more cheaper restaurants or cafes (including extended opening hours); and more or improved entertainment or activities.

## Do they intend to return?

The greatest proportion of respondents intend to return to Caloundra for a holiday (70%), with a further 20% unsure about whether they will return. 10% of respondents said they did not intend to return to Caloundra for a holiday within the next three years.

Not surprisingly, respondents from South East Queensland were more likely to state that they intended to return to Caloundra within three years, compared with those from the rest of Australia (88%\* and 63% respectively).

Across all waves of the Caloundra Visitor Survey, the greatest proportion of respondents consistently indicate they would return to Caloundra within the next three years for a holiday.

\* - Denotes significantly larger proportion

The Northern suburbs of Brisbane include 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.

The 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 incorporate 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.

The Caboolture Shire includes from Bellthorpe in the North West to Bribe 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 extend 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 include 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.

The 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, Cochiemudlo, 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.

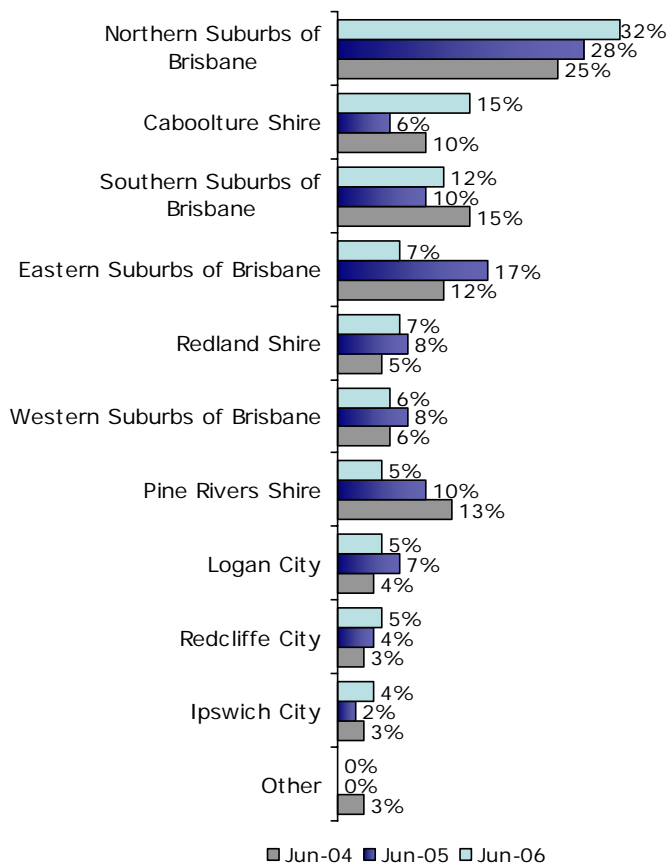
Information pertaining to shire/city boundaries was obtained via each respective council website. Shire/city divisions current as at March 2005.

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.

Ipswich City includes from Goodna in the East, to Marburg in the West, to Pine Mountain in the North, to Peak Crossing and Mount Mort in the South.

Other/Location Unknown refers to regions of Brisbane which are included in the Regional Tourist Organisation (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 '4001' as their postcode, rather than providing their exact suburb postcode.

**FIGURE 24 – RESPONDENT ORIGIN IN BRISBANE**



Base: All respondents from Brisbane – June 2004 (n=181); June 2005 (n=82); June 2006 (n=94)

When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

## **National and International Visitor Surveys (NVS/IVS)**

The NVS which is managed by Tourism Research Australia (TRA), commenced in January 1998 replacing the Domestic Tourism Monitor (DTM). The NVS is a household survey involving telephone interviews with an annual national sample of approximately 80,000 Australian residents aged 14 years and over. From 2005, the annual national sample is increased to approximately 120,000 Australian residents. The IVS involves a detailed single purpose questionnaire which is administered by personal interviews with a sample of "overseas visitors" aged 15 years and older, departing from Australia's nine major international airports. Uses the ABS/TRA regions.

## **Visitor Expenditure**

Regional visitor expenditure estimates for 2005 are derived by Tourism Research Australia (TRA), by applying a model based approach to information on domestic day, domestic overnight and international travel activity at a regional level.

## **Survey of Tourist Accommodation (STA)**

The Survey of Tourist Accommodation is a quarterly survey of establishments providing predominantly short-term accommodation (i.e. for less than two months) to the general public. It is conducted by the Australian Bureau of Statistics and provides information relating to the following categories:

- 1.Licensed hotels with facilities;
- 2.Motels and guesthouses with facilities; and
- 3.Serviced apartments (daily servicing must be available, although this service may not necessarily be used).

Uses the ABS/TRA regions.

From January 1998 the survey included establishments with 15 or more rooms or units however the scope of the survey was expanded in January 2005 to include establishments with 5 or more rooms or units. STA data included in this report comprises establishments with 15 or more rooms or units

## **Roy Morgan Research Holiday Tracking Survey (HTS)**

Roy Morgan Research's HTS is a component of Roy Morgan Single Source, which uses the same methodology as the Morgan Gallup Poll. Roy Morgan Single Source uses a stratified random probability sample to ensure that all states, then metropolitan and country areas, are correctly represented. Interviewing is carried out to ensure complete coverage spread evenly across all electorates, with interviewers being sent to different randomly selected "clusters" of dwellings. The HTS has two components: a face-to-face interview and a self-completion questionnaire. All people who complete the face-to-face component are offered the self-completion survey. Only one person aged 14 years and over is interviewed per dwelling. A large sample collected continuously over the year means that samples of lower incidence populations can be accumulated week by week to the desired size. The HTS information is collected as part of the self-completion questionnaire. Approximately 25,000 of these are processed in each twelve month period. These are weighted by age, sex and area to be representative of the Australian population.

The HTS uses broad descriptors for the regions. The definitions are open to interpretation by the respondents and thus represent what the respondents perceives to be in that region.

## **FURTHER INFORMATION**

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