Sunshine Coast Hinterland Standard Visitor Survey
September 2008

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Executive Summary

The Hinterland Standard Visitor Survey (SVS) was designed to gain an understanding of the tourism market that is attracted to the Hinterland of the Sunshine Coast. The Sunshine Coast is situated in the southeast corner of Queensland and is made up of the four shires of Caloundra, Maroochy, Noosa and Cooloola. The Hinterland is the inland part of this tourism region. It covers the area from the Glass House Mountains in the south to the Mary Valley in the north.

The survey reported here was conducted from July to September 2008. Respondents were recruited from amongst those staying at accommodation establishments throughout the Hinterland area. Day trippers were therefore not included in the survey.

The survey uncovered similar results to those obtained in 2007. The typical visitor to the Hinterland is someone who is seeking a short break, comes from Brisbane or southeast Queensland, is travelling as an adult couple without children, is between 25 and 54 years of age and has a high annual household income. They have generally visited the hinterland before, see it as their only destination on this particular trip and usually spend between 1 and 2 nights there. They use the internet to search for information about the hinterland and to identify and book their accommodation. They visit a number of areas in the Hinterland, but mainly concentrate around Maleny and Montville.

Obviously the typical visitor does not represent the entire market. The survey found that there is also a smaller group of visitors who are on an extended trip around various parts of Queensland (and even Australia) and have included the Hinterland in their itinerary. This group represents almost a quarter of the market. They are more likely to be travelling with children and describe their purpose in being there on a holiday rather than a short break. Some even use the area as a base to explore the local region. This group still uses the internet to source information and make bookings. However, they are also much more likely to use traditional sources of information such as travel brochures and travel guides/books and to rely more on word of mouth recommendation.

Looking at the data in terms of individual features, less than one in ten visitors are travelling with children. Interestingly, those with children tend to be slightly more highly represented in the highest income categories and amongst overseas visitors. In terms of sheer numbers, the largest number of visitors comes from Brisbane and southeast Queensland. The vast majority are also visiting the Hinterland as their only destination, especially those coming from within Queensland. There is a large number of first time overnight visitors from all source areas, even Brisbane. Because many overnight visitors have been to the Hinterland before as day trippers, there appears to be some form of conversion from day trippers to overnight visitors occurring.

Most overnight visitors surveyed identified either a short break or a holiday as their purpose for going to the Hinterland. The short break is particularly important to those who are only visiting this destination. Having a holiday is of more importance to those on an extended trip beyond the Hinterland. In terms of motivation, enjoying the peace and quiet of an uncrowded destination and relaxing and rejuvenating are the primary drivers. Interestingly, seeking indulgence in a luxurious escape does not rate as highly as could be expected in such a destination. Almost half considered other destinations to visit, demonstrating that the Hinterland operates in a competitive environment, even amongst return visitors. Advertising recall is relatively high, especially amongst those living overseas or in Queensland outside of Brisbane. The power of the internet is also seen with many using it to seek information about the area and the availability of accommodation.

Visitors are very satisfied with their experiences in general and nominate various characteristics of the natural environment as the most appealing aspects of the Hinterland. The highest level of satisfaction is expressed for the friendliness of the locals, the range of restaurants and cafes and the level of personal safety / security that they feel. This high level of satisfaction is reflected in a high intention to return, even amongst interstate and some overseas visitors. Aspects of the Hinterland that visitors find most appealing generally involve the natural environment rather than man-made attractions. They identify the need to limit or restrict further commercialisation as the most important improvement the area needs. Suggestions for improvements are to provide more car parking, to restrict or limit development or commercialisation and to improve signage.

Introduction

What is this report all about?

The Hinterland Standard Visitor Survey was undertaken by Tourism Sunshine Coast in partnership with the Blackall Range Business and Tourism Association from July to September 2008. It is based on similar region-wide visitor research that Tourism Sunshine Coast has managed on behalf of its partners Caloundra Tourism, Discover Maroochy, Tourism Noosa and the Cooloola Regional Development Bureau.

The specific objectives of the research are:

- to profile visitors to the Hinterland in terms of demographics and travel behaviour;
- to determine the effectiveness of certain marketing activities;
- to determine what motivates people to visit the Hinterland;
- to measure visitor satisfaction with specific aspects of the Hinterland; and
- to determine improvements that could be made in the Hinterland to increase visitor satisfaction.

How can you use this report?

The ultimate value of this report is to enable the reader to better manage and market the Sunshine Coast Hinterland as a tourist destination and to ensure that individual tourism products address consumer needs. Knowing who the current visitors are can help to target more likeminded people with similar interests and behaviours. At various points throughout the report snapshots of visitor types are provided to help paint a clear picture of who should be targeted. It is well known that there is no such thing as a 'typical' tourist as the market becomes increasingly diversified. However, if we can paint a picture of different sub-groups within this amorphous mass then more targeted marketing and product development can occur.

Methodology

Throughout this report the name 'Hinterland' refers to the area from the Glass House Mountains in the south to the Mary Valley in the north, which is the inland part of the Sunshine Coast Tourism Region.

The Hinterland includes a wide diversity of tourism destinations including Maleny, Montville, Eumundi, Glass House Mountains, Beerwah, Woombye, Pomona, Cooroy and Kin Kin and surrounding areas. The data collection process attempted to capture visitors from across this diverse area.

The questionnaire used for the study is based on the Standard Visitor Survey that was designed by Tourism Queensland in consultation with Tourism Sunshine Coast and the local tourism partners, Maroochy, Caloundra, Noosa and Cooloola and Hinterland stakeholders. This was modified to meet the expressed needs of operators in the Hinterland. The questionnaire included questions about visitor demographics, travel behaviour, motivations and satisfaction.

Data was collected by accommodation providers located in the region. Each asked their visitors to complete the questionnaire during their stay. Because this data collection method could only capture those staying at least one night in the Hinterland the report covers only a section of the visitors to the area. Tourism Sunshine Coast and its Local Tourism Partners capture 'day tripper' data in the peak season January Standard Visitor Survey.

Although a total of 200 respondents were targeted for the project, this was exceeded and 255 surveys were completed. Tourism Sunshine Coast managed the collection process, including the recruitment of accommodation providers willing to distribute the questionnaires. Volunteer accommodation providers were given instructions and advice about the structure and layout of the questionnaire and data collection guidelines. This proved to be very effective. The types of participating accommodation establishments are presented in Figure 1. As can be seen, the largest category is that of Cabin/Cottage (not in a park). Tourism Sunshine Coast would like to thank them for their efforts.

Data from completed questionnaires were analysed using SPSS statistical analysis software. The results are presented as tables and graphs and in some cases these are accompanied by written comments. The order that the data is presented is designed to capture its key features rather than being in the order found on the questionnaire. Most questions have been crosstabulated with five key variables: origin, age, income, group type[*] and type of visit (ie. whether or not it was the sole destination).

Figure 1: Location of Interviews

Accommodation Type	Frequency	Percent
Rented Apartment /Holiday flat	2	0.90%
Motel	4	1.80%
Hotel/Resort	9	4.00%
Bed & Breakfast	82	36.10%
Caravan/Cabin/Tent	19	8.40%
Cottage/Cabin (not in park)	101	44.50%
Farmstay	9	4.00%
Other	1	0.40%
Total	255	100.00%

Not Known = 28

[*] As will be seen, the most significant difference in group type is whether the travel party includes children.

Visitor Profile



What do the Hinterland visitors look like?

A typical visitor . . . .
A typical overnight visitor to the Hinterland is someone who comes from Brisbane or southeast Queensland, is travelling as an adult couple, aged between 25 and 54 years and has an annual gross household income of $80,000-$120,000. They have generally visited the Hinterland before but they are on their first overnight visit. They spend between 1 and 2 nights in the Hinterland which is their only destination.

Their travel party . . . .
An extremely large proportion of overnight visitors to the Hinterland are travelling as an adult couple. When these are added to the groups travelling alone, in a small group or as friends/relatives without children, it can be seen that the overall market is dominated by people travelling without children. Those with children mainly come from Brisbane and overseas, are in the 25-54 year age group and (except for those from Brisbane) are more likely to be on a longer trip.

Their household income . . . .
The majority of visitors have an annual household income of $80,000 or more and there is an unusually high proportion of visitors with $120,000+. Those with the highest household incomes tend to come from overseas and to a lesser extent Brisbane. Visitors from other parts of Queensland tend to be under-represented in the highest income group. Those in the $60,000-$99,000 groups are likely to be travelling without children and the Hinterland is their only destination on this trip.

Their origin . . . .
The Hinterland is attracting a large proportion of its visitors from Brisbane and Southeast Queensland. Although those from Brisbane come from all over the urban area, the largest number comes from the northern suburbs. An important secondary market is interstate visitors, with the majority of these coming from New South Wales. Of the small number from overseas, the majority come from English-speaking countries. Overseas and interstate visitors are more likely to be travelling with children than those from other areas. Visitors from Brisbane and Southeast Queensland tend to be over-represented in the 25-44 age group and under-represented in the older groups. The opposite is the case for interstate visitors who are over-represented in the over 45 groups. Overseas visitors are predominantly in the 55-64 year group. Not surprisingly, interstate and overseas visitors are more likely to be on their first overnight trip to the Hinterland. Brisbane visitors are more likely to be repeat visitors, and are particularly over-represented amongst those who have been four or more times before.

Their trip . . . .
While the Hinterland is a single destination for most visitors, almost one in four is on a multi-destination extended tour. Many of the latter are touring southeast Queensland, but almost half are visiting the Hinterland as part of an extended trip that could include several states. Most visitors on a multi-destination trip are from interstate or overseas and are more likely to be travelling without children. A significant number of visitors are on their first trip to the Hinterland, even as a day visitor.

Visitor Characteristics

General Overview

- Just under two thirds of respondents are female.
- Over two thirds of visitors are aged between 25 and 54 years, with the largest group being in the 35-44 year group.
- Three quarters of visitors are travelling as an adult couple.
- Less than 1 in 10 are travelling with children.
- The largest single income group has an annual household gross income of $80,000-$90,000.
- The proportion of visitors with an annual household gross income of less than $60,000 is very small (26%).
- Over half of those travelling without children are over 45 years old. This contrasts with only 37% who are travelling with children.
- Over one third (38%) of visitors travelling with children are from overseas or interstate.
- Although the proportion of Brisbane visitors travelling with children is low, the sheer number of visitors from Brisbane means that half of those travelling with children are from there.

Figure 1: Gender of respondents

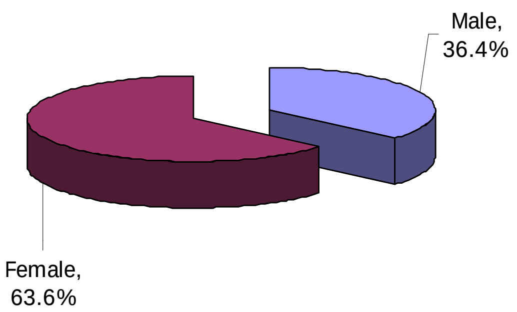


Figure 2: Age of visitors

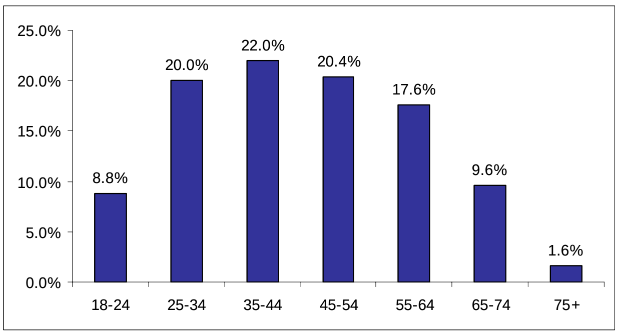


Figure 3: Trip party

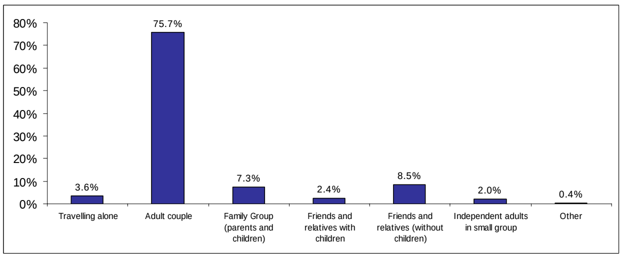


Figure 4: Income of visitors

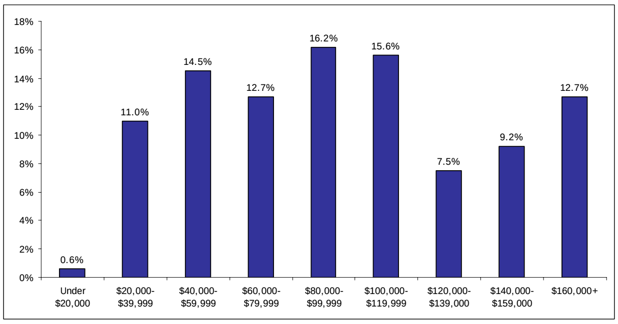


Figure 5: With/Without children by income

Income	Travelling with Children	Travelling Without Children
$0-$59,999	36.8%	24.7%
$60,000-$119,000	26.3%	46.0%
$120,000+	36.8%	29.3%
Total	100.0%	100.0%

Figure 6: With/Without children by origin

Origin	Travelling with Children	Travelling Without Children
Brisbane	50.0%	54.1%
Southeast Queensland	4.2%	17.9%
Other Queensland	8.3%	4.6%
Interstate	16.7%	18.3%
Overseas	20.8%	5.0%
Total	100.0%	100.0%

Figure 7: With/Without children by age

Age	Travelling with Children	Travelling Without Children
18-24	4.2%	8.6%
25-34	25.0%	19.4%
35-44	33.3%	20.7%
45-54	25.0%	20.3%
55-64	4.2%	19.4%
65-74	8.3%	9.9%
75+	0.0%	1.8%
Total	100.0%	100.0%

Origin of Visitors

General Overview

- Over half of visitors (58%) come from Brisbane.
- Amongst those visitors who come from Brisbane, just under one third (30%) come from the northern suburbs.
- Visitors from overseas tend to be few in number and come mainly from English speaking countries, particularly the UK and New Zealand.
- Just under half the visitors from Brisbane are aged 35-44 while less than expected are in the older age groups.
- Those visitors with the highest incomes tend to come from overseas and to a lesser extent Brisbane.
- Interstate and overseas visitors are more likely to be travelling with children than intrastate visitors.
- The largest proportion of repeat overnight guests comes from Brisbane and southeast Queensland.
- Some Brisbane visitors have never been to the Hinterland before (even as a day visitor).
- Visitors from overseas and from Other Queensland are more likely to be travelling with children.

Figure 8: Origin of Australian visitors

Origin	Frequency	Percent
NSW	19	8.3%
Victoria	5	2.2%
Brisbane	132	57.6%
Other QLD	12	5.2%
South Australia	4	1.7%
Western Australia	8	3.5%
Tasmania	1	0.4%
Northen Territory	1	0.4%
Melbourne	6	2.6%
Gold Coast	17	7.4%
Sunshine Coast	19	8.3%
Southern Downs and Toowoomba	5	2.2%
Total	229	100.0%

Figure 9: Origin of all visitors

Origin	2007	2008	
	Percent	Frequency	Percent
Brisbane	49.4%	132	53.9%
Southeast Queensland	18.4%	41	16.7%
Other Queensland	9.6%	12	4.9%
Interstate	17.6%	44	18.0%
Overseas	5.0%	16	6.5%
Total	100.0%	245	100.0%

Figure 10: Origin of Brisbane visitors

Origin	2007	2008	
	Percent	Frequency	Percent
North	29.7%	39	29.8%
Pine Rivers Shire	11.0%	9	6.9%
Redcliffe	5.1%	4	3.1%
West	9.3%	9	6.9%
South	9.3%	17	13.0%
Logan	5.1%	8	6.1%
East	11.0%	16	12.2%
Redlands	5.9%	10	7.6%
Caboolture	7.6%	10	7.6%
Ipswich	5.9%	9	6.9%
Total	100.0%	131	100.0%

Figure 11: Origin of overseas visitors

Origin	Percent
United Kingdom	38.9%
New Zealand	27.8%
USA	16.7%
Canada	5.6%
Japan	5.6%
Malaysia	5.6%

Figure 12: Origin by with/without children

Origin	Travelling with Children	Travelling Without Children	Total
Brisbane	9.2%	90.8%	100%
Southeast Queensland	2.5%	97.5%	100%
Other Queensland	16.7%	83.3%	100%
Interstate	9.1%	90.9%	100%
Overseas	31.3%	68.8%	100%

Figure 13: Origin by income

Origin	$0-$59,999	$60,000-$119,000	$120,000+	Total
Brisbane	24%	44%	32%	100%
Southeast Queensland	23%	50%	27%	100%
Other Queensland	25%	50%	25%	100%
Interstate	36%	40%	24%	100%
Overseas	20%	40%	40%	100%

Figure 14: Origin by Age

Origin	Brisbane	Southeast Queensland	Other Queensland	Interstate	Overseas
18-24	9.8%	14.6%	8.3%	0%	6.3%
25-34	25.0%	17.1%	25.0%	9.1%	12.5%
35-44	24.2%	17.1%	8.3%	25.0%	12.5%
45-54	22.0%	31.7%	31.7%	9.1%	12.5%
55-64	14.4%	9.8%	16.7%	29.5%	37.5%
65-74	3.0%	7.3%	16.7%	27.3%	12.5%
75+	1.5%	31.7%	0%	0%	6.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Figure 15: Repeat visit by origin

Origin	First overnight visit	Visited overnight before
Brisbane	43.0%	66.7%
Southeast Queensland	15.6%	18.4%
Other Queensland	7.0%	2.6%
Interstate	23.4%	10.5%
Overseas	10.9%	1.8%
Total	100.0%	100.0%

Figure 16: Previous day visit by origin

Origin	First day visit	Visited 1-3 times	Visited 4+ times
Brisbane	31.2%	61.0%	72.5%
Southeast Queensland	11.7%	17.1%	21.3%
Other Queensland	3.9%	6.1%	3.8%
Interstate	36.4%	12.2%	2.5%
Overseas	16.9%	3.7%	0.0%
Total	100.0%	100.0%	100.0%

Trip Pattern

General Overview

- Almost one quarter (23.1%) of visitors are on an extended trip beyond the Sunshine Coast Hinterland.
- Of those on an extended trip to several destinations, over half (56%) are on an extended trip that goes beyond the immediate southeast Queensland region.
- Three quarters of visitors on an extended trip were from overseas and interstate.
- Those visitors who are travelling with children are more likely to be visiting the Hinterland as part of an extended trip (38%) compared with those who are travelling without children (22%).
- Just over half of all visitors (52%) are on their first overnight stay in the Hinterland. This is higher than in the 2007 survey.
- Only a third of visitors (33%) are on their first visit to the Hinterland. This means that many people have experienced the Hinterland on a day trip and returned to stay at a later date.
- Of those who are on their first overnight visit, over half (57%) have never visited the Hinterland before. Amongst those on an extended trip this rises to 83%.
- Visitors on a longer trip tend to stay longer than those who have the Hinterland as their only destination. The former group appear to use it as a base for exploring this part of the world.

Figure 17: Type of trip

Type of Trip	2007	2008	
	Percent	Frequency	Percent
Only Destination	81.4%	193	76.9%
Longer Trip	18.6%	58	23.1%
Total	100%	251	100%

Figure 18: Type of trip by origin

Number of nights	Only Destination	Longer Trip
Brisbane	67%	9%
Southeast Queensland	18%	9%
Other Queensland	5%	6%
Interstate	9%	50%
Overseas	1%	26%
Total	100%	100%

Figure 19: Extended trip location

Extended Trip Location	2007	2008	
	Percent	Number	Percent
Coastal Queensland	14%	12	24%
Sunshine Coast	19%	8	16%
East Coast of Australia	14%	8	16%
Extended tour of Australia	12%	7	14%
Southeast Queensland	5%	5	10%
Brisbane and Surrounds	23%	4	8%
Gympie Muster	-	2	4%
Gold Coast and Northern NSW	2%	2	4%
Regional Queensland	7%	1	2%
Business	-	1	2%
Sunshine Coast and Gold Coast	5%	-	-
Total	100%	50	100%

Figure 20: Visitors with/without children by trip type

Type of Trip	Travelling with Children	Travelling Without Children
Only Destination	63%	78%
Longer Trip	38%	22%
Total	100%	100%

Figure 21: Number of overnight visits

Overnight Trips to Hinterland	2007 Percent	2008	
		Frequency	Percent
First Overnight Visit	39%	130	52%
1-3 times	36%	80	32%
4 or more times	25%	41	16%
Total	100%	251	100%

Figure 22: Number of day trips

Day Trips to Hinterland	Frequency	Percent
First Visit Ever	81	33%
1-3 times	87	35%
4 or more times	80	32%
Total	248	100%

Figure 23: Day visit by overnight visit

Day Visit	Overnight Visit			
	First Overnight Visit	1-3 times	4 or more times	Total
First Visit	57%	7%	5%	33%
1-3 times	25%	55%	28%	35%
4 or more times	19%	38%	68%	33%
Total	100%	100%	100%	100%

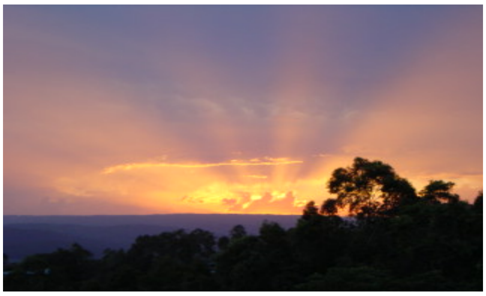
Figure 24: Nights in Hinterland

Nights spent in Hinterland	2007	2008	
	Percent	Frequency	Percent
1 night	22%	41	16%
2 nights	52%	131	52%
3 nights	12%	35	14%
4 nights	7%	12	5%
5-7 nights	4%	23	9%
8-13 nights	-	8	3%
14+ nights	2%	4	2%
Total	100%	254	100%

Figure 25: Type of trip by nights

Number of nights	Only Destination	Longer Trip
1 night	17%	12%
2 nights	61%	24%
3 nights	13%	16%
4 nights	4%	9%
5-7 nights	5%	22%
8-13 nights	1%	10%
14+ nights		7%
Total	100%	100%

Motivation and Information Search



What affects people's decision to stay in the Hinterland?

Their motives . . . .

In simple terms, most people are staying in the Hinterland for a short break or a holiday, with the latter meaning a trip of longer duration. Those on a short break are generally visiting the Hinterland as their only destination and are more likely to be travelling without children. Those on holidays come from all income groups, are more likely to be travelling with children and generally considered more than the Hinterland as a destination. The most important motivation amongst all visitors is the desire to enjoy the peace and quiet of an uncrowded destination and to relax and rejuvenate. Those travelling without children also emphasised the need to spend time with their partner. Those travelling with children emphasised the need to experience nature and to experience local culture and heritage.

The sources of information that they use . . . .

Advertising is recognised by a high proportion of visitors to the Hinterland. This recall level is highest amongst those from Overseas and Other Queensland. Those travelling with children and those who have visited before indicate a slightly higher recall rate. The internet is by far the most important means by which information about the area is sourced. Some visitors to the Hinterland rely on their prior knowledge of the area when planning their trip, with the level being highest amongst those that have visited before. The internet and word of mouth are very important sources of information for those from overseas and interstate. Travel guides are also important for overseas visitors.

Information Sources Used

General Overview

- Just under two thirds of all visitors (61%) recall seeing some form of advertising about the hinterland before their trip. This is an increase on the 2007 figure.
- The proportion of visitors who recall seeing advertising before they arrived in the Hinterland is about the same for those on an extended trip and those only visiting the Hinterland.
- The proportion which recalls seeing advertising is high for all areas except southeast Queensland (excluding Brisbane).
- The level of advertising recall amongst those travelling with children is greater than those travelling without children.
- Those who have visited before have a marginally higher level of advertising recall than those on their first overnight visit.
- The internet is the greatest source of information used by visitors in planning their trip (59%). This was also the case in 2007.
- The internet is also the greatest source of information for visitors from all origins.
- The internet is a particularly important source of information for visitors from overseas (63%), as is the traditional travel book/guide (44%) and word of mouth recommendations (44%).
- Brisbane visitors also use the internet to source information (61%).
- The internet is less important as a source of information amongst those on a longer trip (55%) compared with those having the Hinterland as their only destination (60%).
- Word of mouth is particularly important amongst those visiting the Hinterland as part of a longer trip (36%).
- Although prior knowledge of the region is much more important amongst those on a repeat visit (56%), the internet still plays a significant role (60%) amongst this group.
- Almost half of visitors (47%) consider alternative destinations when planning their trip. This is approximately the same proportion doing so in 2007.
- The proportion who considered alternative destinations is only slightly higher for visitors on a repeat visit than for those on their first trip.

Figure 26: Advertising recall

Recall seeing advertisements before leaving home	2007	2008	
	Percent	Frequency	Percent
Yes	46%	153	61%
No	46%	30	12%
Unsure	8%	69	27%
Total	100%	252	100%

Figure 27: Type of trip by advertising recall

Advertising recall	Only Destination	Longer Trip
Yes	60%	64%
No	12%	12%
Unsure	28%	24%
Total	100%	100%

Figure 28: Origin by advertising recall

Origin	Advertising Recall			
	Yes	No	Unsure	Total
Brisbane	61%	10%	29%	100%
Southeast Queensland	50%	15%	35%	100%
Other Queensland	67%	0%	33%	100%
Interstate	59%	16%	25%	100%
Overseas	75%	19%	6%	100%
Total	60%	12%	28%	100%

Figure 29: Type of group by advertising recall

Advertising recall	Travelling with Children	Travelling Without Children
Yes	71%	59%
No	13%	12%
Unsure	17%	29%
Total	100%	100%

Figure 30: Visit by advertising recall

Advertising recall	First overnight visit	Visited overnight before
Yes	59%	63%
No	16%	7%
Unsure	26%	30%
Total	100%	100%

Figure 31: Information source used

Information source	2007	2008
None	10%	11%
Prior knowledge of region	36%	42%
Travel agent	5%	9%
Word of mouth	22%	29%
Motoring organisation	5%	12%
Internet	63%	59%
Travel brochure/ Magazine	10%	17%
Travel Book / Guide	8%	15%
Nation/State tourism agency	2%	8%
Visitor Information Centre	5%	15%
Other	8%	10%

Figure 32: Information source by visit

Information source	First overnight visit		Visited overnight before	
	Count	Percent	Count	Percent
None	16	12%	10	8%
Prior knowledge of region	37	29%	68	56%
Travel agent	15	12%	9	7%
Word of mouth	43	33%	29	24%
Motoring organisation	17	13%	12	10%
Internet	76	59%	72	60%
Travel brochure/magazine	23	18%	19	16%
Travel Book / Guide	25	19%	14	12%
Nation/State tourism agency	12	9%	7	6%
Visitor Information Centre	24	19%	15	12%
Other	13	10%	12	10%

Figure 33: Information source by type of trip

Information source	Only destination		Part of longer trip	
	Count	Percent	Count	Percent
None	23	12%	5	9%
Prior knowledge of region	83	43%	22	38%
Travel agent	21	11%	3	5%
Word of mouth	51	26%	21	36%
Motoring organisation	22	11%	8	14%
Internet	116	60%	32	55%
Travel brochure/magazine	26	14%	14	24%
Travel Book / Guide	23	12%	15	26%
Nation/State tourism agency	16	8%	3	5%
Visitor Information Centre	21	11%	17	29%
Other	21	11%	4	7%

Figure 34: Information source by origin

Information source	Brisbane	Southeast Queensland	Other Queensland	Interstate	Overseas
None	11%	15%	25%	9%	0%
Prior knowledge of region	42%	46%	50%	34%	31%
Travel agent	8%	15%	17%	7%	13%
Word of mouth	24%	34%	25%	30%	44%
Motoring organisation	10%	12%	17%	14%	6%
Internet	61%	59%	58%	43%	63%
Travel brochure/magazine	11%	22%	17%	27%	13%
Travel Book / Guide	11%	10%	25%	21%	44%
Nation/State tourism agency	7%	10%	17%	7%	0%
Visitor Information Centre	11%	17%	17%	23%	19%
Other	9%	12%	17%	5%	13%

Figure 35: Other destinations considered

Destinations considered	2007 Percent	2008 Count	2008 Percent
Only destination considered	54%	135	53%
Sunshine Coast	38%	89	35%
Gold Coast	10%	48	19%
Stanthorpe/Granite Belt	6%	33	13%
Byron Bay & Hinterland	10%	46	18%
Northern Rivers of NSW	3%	33	13%
Cooloola	2%	20	8%
Brisbane	5%	31	12%
Other	8%	46	18%

Figure 36: Destinations considered by visit

Destinations considered	First overnight visit		Visited overnight before	
	Count	Percent	Count	Percent
Only destination considered	65	50%	67	55%
Sunshine Coast	45	35%	43	36%
Gold Coast	31	24%	17	14%
Stanthorpe/Granite Belt	17	13%	16	13%
Byron Bay & Hinterland	26	20%	20	17%
Northern Rivers of NSW	22	17%	11	9%
Cooloola	12	9%	8	7%
Brisbane	22	17%	9	7%
Other	26	20%	20	17%

Motivation for the trip

General Overview

- Just over half of visitors (56%) described the purpose of their visit as a short break. This is slightly lower than in 2007.
- Those travelling with children are still more likely to describe the purpose of their trip as being a short break (38%) rather than a holiday (29%).
- While both first time and repeat visitors nominate short break as the primary purpose, the proportion of those on their first visit who describe it as a holiday is twice that of repeat visitors. This may reflect the fact that many first time visitors are on an extended trip. A quarter (25%) of the latter group describes it as a holiday.
- The importance of the short break is evident in all income groups.
- The most important motivators amongst all visitors are 'to relax and rejuvenate', 'to enjoy the peace and quiet of an uncrowded destination' and 'to spend time with my partner'.
- The desire 'to indulge in a luxurious escape' does not appear to be as important as the previous motives with all groups.
- There is considerable difference between the motives of those travelling with children and those travelling without. Those travelling with children placed greater emphasis on 'to experience nature', 'to experience local culture and heritage' and 'to get off the beaten track'.
- Those on a repeat visit place more emphasis on being able 'to spend time with my partner', 'to relax and rejuvenate', 'to enjoy the peace and quiet of an uncrowded destination' than do those on their first overnight visit.

Figure 37: Purpose of the trip

Purpose	2007	2008	
	Percent	Frequency	Percent
Holiday	15%	49	19%
Short Break	60%	142	56%
Honeymoon	1%	6	2%
Wedding	5%	17	7%
Special public event	1%	7	3%
Visiting friends and relatives	5%	8	3%
Business/employment/training	5%	6	2%
Other	7%	20	8%
Total	100%	255	100%

Figure 38: Purpose by income

Purpose	$0-$59,999	$60,000-$119,000	$120,000+	Total
Holiday	40%	40%	20%	100%
Short Break	19%	47%	34%	100%
Honeymoon	43%	29%	29%	100%
Wedding	29%	47%	24%	100%
Special public event		67%	33%	100%
Business/employment/training		50%	50%	100%
Other	50%	33%	17%	100%

Figure 39: Income by purpose

INCOME	Holiday	Short Break	Honey-moon	Wedding	Special public event	Visiting Friends and Relatives	Business/ employment/ training	Other	Total
$0-$59,999	27%	42%	4%	11%	2%			13%	100%
$60,000-$119,000	16%	60%	1%	8%	1%	3%	7%	5%	100%
$120,000+	12%	67%	2%	2%	6%	6%	2%	4%	100%

Figure 40: Travel party by purpose

Purpose	Travelling with Children	Travelling Without Children
Holiday	29%	19%
Short Break	38%	57%
Honeymoon		2%
Wedding	8%	7%
Special public event	4%	3%
Visiting Friends & Relatives	13%	2%
Business/employment/training		3%
Other	8%	8%
Total	100%	100%

Figure 41: Visit by purpose

Purpose	First overnight visit	Visited overnight before
Holiday	25%	13%
Short Break	48%	65%
Honeymoon	2%	2%
Wedding	9%	5%
Special public event	5%	
Visiting Friends and Relatives	2%	4%
Business/employment/training	2%	3%
Other	9%	7%
Total	100%	100%

Figure 42: Trip type by purpose

Purpose	Only Destination	Longer Trip
Holiday	6%	64%
Short Break	68%	14%
Honeymoon	3%	
Wedding	8%	3%
Special public event	3%	3%
Visiting Friends and Relatives	3%	5%
Business/employment/training	3%	2%
Other	8%	9%
Total	100%	100%

Figure 43: Origin by purpose

Purpose	Brisbane	Southeast Queensland	Other Queensland	Interstate	Overseas
Holiday	5%	15%		50%	63%
Short Break	74%	59%	50%	16%	13%
Honeymoon	2%			5%	
Wedding	8%	2%	25%	5%	6%
Special public event	1%	5%		7%	6%
Visiting Friends and Relatives	2%		8%	11%	
Business/employment/training	2%	7%	8%		
Other	7%	12%	8%	7%	13%
Total	100%	100%	100%	100%	100%

Figure 44: Motivation scale[*]

Motivation scale	N	Mean	Std. Deviation
To spend time with my partner	241	4.4	1.2
To enjoy peace and quiet of an uncrowded destination	245	4.6	0.8
To relax and rejuvenate	243	4.5	0.8
To indulge in a luxurious escape	236	3.9	1.2
To get off the beaten track	236	3.5	1.2
To experience nature	239	3.7	1.2
To experience local culture and heritage	236	3.0	1.3
To be active and adventurous	241	2.7	1.2
To socialise with friends or meet new people	246	2.6	1.5

[*] Note: The motivation scales have been analysed using the measures of Mean and Standard Deviation. The higher the Mean the more important that scale is perceived to be. The lower the Standard Deviation the more agreement there is on the Mean score.

Figure 45: Motivation Scale by Travel Party

Motivation scale	Travelling with children		Travelling without children	
	Mean	Std. Deviation	Mean	Std. Deviation
To spend time with my partner	3.2	1.8	**4.5**	1.1
To enjoy peace and quiet of an uncrowded destination	4.4	1.0	**4.6**	0.8
To relax and rejuvenate	4.4	1.1	**4.6**	0.8
To indulge in a luxurious escape	3.2	1.4	**4.0**	1.2
To get off the beaten track	**3.8**	1.1	3.5	1.3
To experience nature	**4.2**	1.1	3.7	1.2
To experience local culture and heritage	**3.9**	1.3	2.9	1.2
To be active and adventurous	**3.2**	1.3	2.6	1.2
To socialise with friends or meet new people	**3.2**	1.6	2.5	1.5

Bold indicates that the motive is more important for that group than the other group.

Figure 46: Motivation scale by visit

Motivation scale	First overnight visit		Visited overnight before	
	Mean	Std. Deviation	Mean	Std. Deviation
To spend time with my partner	4.2	1.4	**4.6**	1.1
To enjoy peace and quiet of an uncrowded destination	4.5	0.9	**4.7**	0.7
To relax and rejuvenate	4.4	0.9	**4.7**	0.6
To indulge in a luxurious escape	3.8	1.3	**4.0**	1.1
To get off the beaten track	**3.5**	1.2	3.4	1.3
To experience nature	3.7	1.3	3.7	1.1
To experience local culture and heritage	**3.1**	1.3	2.9	1.2
To be active and adventurous	2.7	1.2	2.7	1.2
To socialise with friends or meet new people	**2.6**	1.5	2.5	1.5

Bold indicates that the motive is more important for that group than the other group.

Figure 47: Motivation scale by trip type

Motivation scale	Only destination		Longer trip	
	Mean	Std. Deviation	Mean	Std. Deviation
To spend time with my partner	4.56	1.13	3.82	1.45
To enjoy peace and quiet of an uncrowded destination	4.58	0.80	4.45	0.90
To relax and rejuvenate	4.61	0.72	4.27	1.05
To indulge in a luxurious escape	4.07	1.11	3.34	1.42
To get off the beaten track	3.43	1.25	3.75	1.09
To experience nature	3.62	1.19	3.96	1.16
To experience local culture and heritage	2.93	1.22	3.27	1.39
To be active and adventurous	2.60	1.19	3.07	1.27
To socialise with friends or meet new people	2.41	1.52	2.96	1.39

Trip Experiences

What types of experiences do they have?

Where they go . . . .

A large number of places in the broader region are visited by guests during their visit to the Hinterland. However, this does not mean that everyone is visiting all these places as none of the locations are visited by even a third of the guests. The most popular are Eumundi and Noosa. Within the Hinterland a large number of places are visited by respondents with the main activity being concentrated around Maleny and Montville. The Glass House Mountains and Beerwah area is slightly more popular with those travelling with children. This may be due to a number of such groups visiting Australia Zoo.

What they do . . . .

The most popular activities undertaken by visitors during their stay are eating at a restaurant, going to a café or coffee shop, going for a walk or shopping for pleasure. These are very similar activities to those undertaken in non-beach destinations around Australia. Visiting a market and an art/craft gallery are also very popular amongst visitors to the Hinterland. Specialised activities such as golf, visiting a museum or going horse-riding are only engaged in by a small number of visitors.

Where they stay . . . .

The choice of specific accommodation is made using a variety of sources, the most important of which is the internet. Travel agents are used by only a very small proportion of visitors and none booked through a Visitor Information Centre. Most visitors are satisfied with all aspects of accommodation in the Hinterland. The level of service received provides the highest level of satisfaction. The overall level of satisfaction of those on an extended trip is slightly less than those who have the Hinterland as their only destination.

Places Visited

General Overview

- People staying overnight in the Hinterland visit a large number of places during their stay.
- Those travelling with children visit a lot more areas than those travelling without. This may reflect their different motives for travelling, the fact that many are from overseas and interstate (and therefore interested in seeing many places) and are more likely to be on an extended trip.
- Overnight visitors appear to go to many places within the Hinterland itself, but the major areas visited are around Maleny and Montville.
- The area around the Glass House Mountains, Beerwah and Landsborough is slightly more popular amongst those travelling with children. This may indicate that a large number visit Australia Zoo.
- Those travelling without children are more likely to visit the Montville – Mapleton area.
- The most popular activities amongst visitors are eating in a restaurant, going to a café or coffee shop, going on a walk or going shopping for pleasure.
- Many of the more specialist activities (such as fishing and playing golf) are not undertaken by many visitors.
- Visiting a winery is one activity that is more popular than one would expect given the limited number that exist in the area.

Figure 48: Places visited during stay

Locations Visited	Count	Percent
Eumundi	77	30%
Noosa	69	27%
Brisbane	59	23%
Mooloolaba	50	20%
Caloundra	46	18%
Gympie	44	17%
Nambour	44	17%
Maroochydore	43	17%
Mary Valley	39	15%
Coolum	38	15%
Fraser Island/Hervey Bay	36	14%
Gold Coast	36	14%
Rainbow Beach	26	10%
Toowoomba/Darling Downs	22	9%
Tin Can Bay	15	6%
Stanthorpe/Granite Belt	12	5%

Figure 49: Places visited by with/without children

Locations Visited	Travelling with children	Travelling without children
Fraser Island/Hervey Bay	21%	14%
Gympie	25%	17%
Mary Valley	21%	15%
Tin Can Bay	0%	7%
Rainbow Beach	17%	10%
Noosa	17%	28%
Coolum	4%	16%
Eumundi	25%	30%
Nambour	13%	19%
Maroochydore	13%	18%
Mooloolaba	21%	20%
Caloundra	13%	19%
Brisbane	38%	22%
Gold Coast	13%	15%
Toowoomba/Darling Downs	13%	9%
Stanthorpe/Granite Belt	4%	5%

Figure 50: Places visited by destination

Locations Visited	Only destination	Longer trip
Fraser Island/Hervey Bay	8%	36%
Gympie	12%	36%
Mary Valley	10%	31%
Tin Can Bay	3%	16%
Rainbow Beach	6%	24%
Noosa	19%	53%
Coolum	14%	17%
Eumundi	26%	45%
Nambour	14%	31%
Maroochydore	14%	26%
Mooloolaba	15%	35%
Caloundra	16%	26%
Brisbane	14%	57%
Gold Coast	8%	36%
Toowoomba/Darling Downs	5%	21%
Stanthorpe/Granite Belt	5%	5%

Figure 51: Places Visited within the Hinterland

Hinterland locations visited	Count	Percent
Montville/Hunchy/Flaxton/Mapleton	151	59%
Maleny/Witta/Conondale/Kenilworth	125	49%
Eumundi/Yandina	66	26%
Glass House Mountains/Beerwah/Landsborough	62	24%
Other	24	9%
Woombye/Palmwoods/Eudlo/Mooloolah	15	6%
Cooroy	8	3%
Pomona	5	2%
Kin Kin	4	2%

Figure 52: Activities undertaken

Activities	Count	Percent
Go to Cafe/Coffee Shop	161	63%
Eat at Restaurant	148	58%
Go on a walk	146	57%
Go Shopping	123	48%
Visit a National Park/State Forest/Reserve	100	39%
Purchase local gourmet food items	96	38%
Vist Art/Craft Gallery	89	35%
Visit markets	82	32%
Visit a major attraction	44	17%
Visit a winery	42	17%
Visit Friends/Relatives	42	17%
Go to the beach	39	15%
Go to a day spa/Have a massage	22	9%
Go fishing	11	4%
Visit museum	10	4%
None of the above	10	4%
Go on a tour	8	3%
Go horse riding	7	3%
Play golf	3	1%
Go on the Noosa Food Trail	2	1%

Figure 53: Places visited within the Hinterland by with / without children

Hinterland locations visited	Travelling with children	Travellin without children
Maleny/Witta/Conondale/Kenilworth	50%	51%
Montville/Hunchy/Flaxton/Mapleton	38%	63%
Glass House Mountains/Beerwah/Landsborough	29%	24%
Eumundi/Yandina	25%	25%
Other	8%	10%
Cooroy	0%	4%
Pomona	0%	2%
Kin Kin	0%	2%
Woombye/Palmwoods/Eudlo/Mooloolah	0%	7%

Accommodation

General Overview

- The internet is used extensively in the accommodation booking process with 46% of respondents using it in some way. This represents a significant rise on the 2007 results (39.3%).
- The most common way that most groups use the internet is to search for accommodation and then phone to book.
- Travel agents are only used by a small minority of visitors (2%) even amongst those on a longer trip.
- Only 7% of visitors did not book ahead. The proportion is much greater amongst those on a longer trip (21%). A similar result was found in the 2007 survey.
- Visitors express a high level of overall satisfaction with the accommodation in the Hinterland. Over ninety-six percent (96.1%) say that they are either satisfied or very satisfied.
- Visitors are satisfied with all aspects of accommodation, with the highest score being for service.
- Visitors on an extended holiday are least satisfied with value for money, but even their level of satisfaction is high and there is a diversity of opinion on this point.
- The least satisfied aspect amongst those not on an extended trip is availability. Again this is only a marginal reduction in the satisfaction score and the widest diversity of opinion amongst the scores is evident. This could reflect difficult experiences booking accommodation by a few rather than an overall concern.

Figure 54: How accommodation booked

Booking method	Frequency	Percent
Did not book ahead	17	7%
Direct Booking (Stayed before)	30	12%
Direct Booking from home	68	27%
Travel Agent	6	2%
Internet to find and book	41	16%
Internet to find then phoned direct	54	22%
Visitor Information Centre	1	0%
Internet booking site	19	8%
Other	15	6%
Total	251	100%

Figure 55: With/Without children by booking method

Booking method	Travelling with children	Travelling without children
Did not book ahead	8%	7%
Direct Booking (Stayed before)	8%	12%
Direct Booking from home	25%	27%
Travel Agent	0%	3%
Internet to find and book	29%	15%
Internet to find then phoned direct	8%	23%
Visitor Information Centre	0%	1%
Internet booking site	4%	8%
Other	17%	5%
Total	100%	100%

Figure 56: Visit by booking method

Booking method	First overnight visit	Visited overnight previously
Did not book ahead	9%	5%
Direct Booking (Stayed before)	2%	22%
Direct Booking from home	25%	30%
Travel Agent	3%	2%
Internet to find and book	22%	11%
Internet to find then phoned direct	23%	19%
Visitor Information Centre	1%	0%
Internet booking site	9%	7%
Other	6%	6%
Total	100%	100%

Figure 57: Trip type by booking method

Booking method	Only destination	Longer trip
Did not book ahead	3%	21%
Direct Booking (Stayed before)	12%	9%
Direct Booking from home	30%	21%
Travel Agent	3%	2%
Internet to find and book	17%	16%
Internet to find then phoned direct	25%	9%
Visitor Information Centre	0%	0%
Internet booking site	7%	9%
Other	4%	14%
Total	100%	100%

Figure 58: Satisfaction with accommodation

Scale	Number	Mean	Standard deviation
Overall assessment of accommodation	231	4.6	0.62

Figure 59: Satisfaction with accommodation

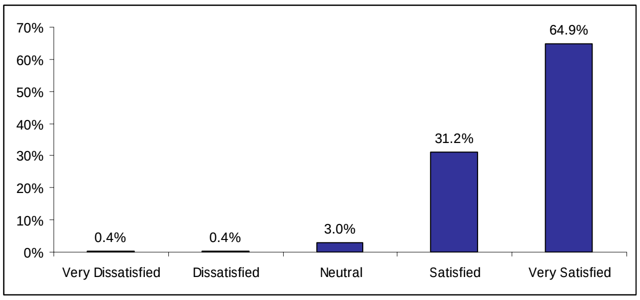


Figure 60: Satisfaction with aspects of accommodation

Aspect of accommodation	Number	Mean	Standard deviation
Range	230	4.5	0.77
Value for money	233	4.4	0.76
Quality	235	4.6	0.64
Service	231	4.7	0.63
Availability	227	4.4	0.82

NB: The higher the Mean, the greater the level of satisfaction.

Figure 61: Trip type by satisfaction with aspects of accommodation

Aspect of accommodation	Only destination			Longer trip		
	Number	Mean	Standard deviation	Number	Mean	Standard deviation
Range	175	4.5	0.75	52	4.4	0.87
Value for money	175	4.5	0.72	55	4.3	0.90
Quality	177	4.7	0.58	55	4.5	0.79
Service	176	4.7	0.57	52	4.5	0.78
Availability	173	4.4	0.81	51	4.4	0.83
Overall assessment	**175**	**4.6**	**0.56**	**53**	**4.5**	**0.78**

Satisfaction, Appealing Aspects and Suggested Improvements



And how satisfied are the visitors?

Their overall satisfaction . . . .
Visitors to the Hinterland are satisfied with most aspects of their experience. The level of satisfaction is highest amongst interstate and overseas visitors. Most visitors who are in a position to return (ie. not living overseas) indicate that they would do so. Less than 1% of visitors expressed dissatisfaction with the destination.

Satisfaction with particular features . . . . .
Visitors express strong satisfaction with most aspects of their experience. They express particularly high satisfaction with the friendliness of the locals, the range of restaurants and cafes and the level of personal safety / security that they feel. In terms of services, the level of service provided while shopping and in cafés and restaurants is very high. The friendliness of the local people is rated highly by both interstate and overseas visitors.

What they like and how it could be improved . . . . . .
Most visitors suggest that the appealing aspects of the Hinterland revolve around the natural environment, scenery and relaxed quiet atmosphere. These aspects are particularly appealing to overseas visitors. The weather is also seen as very appealing by both interstate and overseas visitors who also emphasise the friendliness of the locals. Repeat overnight visitors place greatest importance on the relaxed, peaceful and quiet atmosphere. A popular suggestion is to improve parking and to not over develop the destination or allow too much commercialisation. This suggests that it is the natural endowments of the area that people value most highly, rather than the facilities and services that are provided. This is particularly important amongst those from Brisbane and southeast Queensland. Overseas visitors place greater emphasis on the need for more walking trails and those from interstate suggest the need for better signage.

Satisfaction with the Hinterland

General Overview

- Most visitors (90%) say that they will return to the Hinterland at some point. This is very high and includes some who live interstate and overseas.
- When asked how they would return most (81%) said that it would be for another overnight trip of some sort.
- The highest number planning to return are those who have visited before (97.4%). This indicates a high level of loyalty to the area.
- Overall satisfaction is very high with 38% stating that they are satisfied and 58% stating that they are very satisfied.
- Overall satisfaction is slightly higher amongst those travelling without children and those on a return visit.
- There is no difference in the overall satisfaction amongst those who have the Hinterland as their only destination and those on an extended trip.
- Visitors are generally satisfied with most aspects of the region. They are particularly satisfied with the friendliness of the locals, the feeling of personal safety/security and the range of restaurants and the quality of food in cafes and restaurants.
- Value for money when shopping, car parking facilities and the availability of public transport and tours are those aspects where there is the lowest level of satisfaction. It should be noted that there is quite a difference of opinion with regards to the question of public transport possibly reflecting the relevance of the issue to their experience.
- There is a difference in the satisfaction levels regarding a few aspects of the Hinterland between those on an extended trip and those that are not. Those on an extended trip are generally more satisfied with many aspects (see Table 73 where these are highlighted).
- Overall, return visitors express less satisfaction with most aspects of the Hinterland than first time visitors, except with reference to the question of value for money in restaurants and cafes.
- Visitors nominate the relaxed/peaceful/quiet atmosphere, natural beauty/environment and scenery/views as the most appealing aspects of the Hinterland. The more 'man-made' features like attractions, shopping and markets are nominated far less.
- Those travelling with children emphasize different aspects of the Hinterland as appealing to when compared with those travelling without children. These include less emphasis on restaurants and more on the family friendly atmosphere.
- In line with the latter comment, the most suggested improvement is to restrict or reduce commercialisation/ development followed by more parking.

Figure 62: Would visitor return?

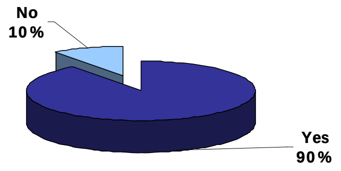


Figure 63: How would visitor return

	Percent	Percent
Unsure	29	13%
Day Trip	13	6%
Weekend/Midweek	88	41%
Holiday	87	40%
Total	217	100%

Figure 64: Trip type by plan to return

Return?	Only Destination	Longer Trip
Yes	96.7%	69.6%
No	3.3%	30.4%

Figure 65: Visit by plan to return

Return?	First overnight visit	Visited overnight before
Yes	83.1%	97.4%
No	16.9%	2.6%

Figure 66: Overall satisfaction

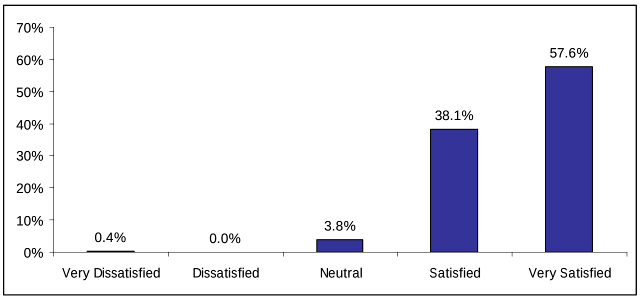


Figure 67: Overall satisfaction by party type

Satisfation level	Travelling with Children	Travelling Without Children
Very Dissatisfied	0.0%	0.5%
Dissatisfied	0.0%	0.0%
Neutral	4.8%	3.3%
Satisfied	28.6%	40.0%
Very Satisfied	66.7%	56.2%

Figure 68: Visit by overall satisfaction

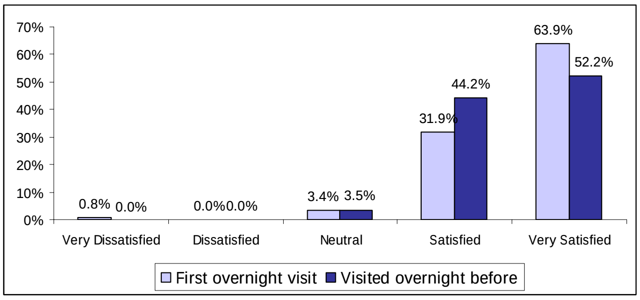


Figure 69: Overall Satisfaction by trip type

Satisfation level	Only Destination	Longer Trip
Very Dissatisfied	0.6%	0.0%
Dissatisfied	0.0%	0.0%
Neutral	3.9%	3.7%
Satisfied	40.0%	31.5%
Very Satisfied	55.6%	64.8%

Figure 70: Origin by overall satisfaction

Level of satisfaction	Brisbane	Southeast Queensland	Other Queensland	Interstate	Overseas
Very Dissatisfied	0%	3%	0%	0%	0%
Dissatisfied	0%	0%	0%	0%	0%
Neutral	5%	5%	0%	3%	0%
Satisfied	37%	40%	64%	38%	25%
Very Satisfied	58%	53%	36%	60%	75%

Figure 71: Satisfaction with Aspects of Hinterland

Aspect of the Hinterland	N	Mean	Std. Deviation
Personal safety/security	206	4.7	4.36
Friendliness of locals	223	4.5	0.73
Range of Restaurants/Cafes	216	4.2	0.78
Quality of food in Restaurants/Cafes	205	4.2	0.78
Service in Restaurants/Cafes	200	4.2	0.83
Overall assessment of Restaurants/Cafes	200	4.1	0.71
Atmosphere in Restaurants/Cafes	198	4.1	0.77
VIC - quality of service	120	4.1	1.01
Access/transport to region	177	4.1	0.92
Quality of goods in shops	174	4.0	0.83
Current level of development	198	4.0	0.92
Service in shops	176	4.0	0.85
Overall view of shopping	180	3.9	0.81
Value for money in Restaurants/Cafes	207	3.9	0.90
Range of shopping	181	3.9	0.87
Opening hours of Restaurants/Cafes	195	3.8	1.01
Directional signage	219	3.7	1.02
Availability of events	88	3.7	1.11
Value for money of shopping	176	3.7	0.86
Availability of tours	78	3.7	1.05
Car park facilities	214	3.7	1.05
Availability of public transport	73	2.8	1.24

Figure 72: Travel group by satisfaction with aspects of hinterland

Aspect of the Hinterland	Travelling with Children			Travelling Without Children		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Friendliness of locals	19	**4.6**	0.50	200	4.5	0.67
Availability of tours	8	**4.4**	0.74	67	3.7	0.98
VIC - quality of service	13	**4.4**	0.96	105	4.1	0.94
Personal safety/security	18	4.3	0.83	184	**4.7**	4.59
Current level of development	16	**4.2**	0.75	178	4.0	0.88
Availability of events	8	**4.1**	0.64	76	3.7	1.08
Overall assessment of Restaurants/Cafes	15	4.1	0.59	182	**4.2**	0.66
Range of Restaurants/Cafes	19	4.1	0.71	192	**4.2**	0.74
Value for money in Restaurants/Cafes	18	4.0	0.69	185	4.0	0.87
Quality of food in Restaurants/Cafes	16	4.0	0.82	185	**4.2**	0.71
Service in Restaurants/Cafes	15	4.0	0.76	182	**4.2**	0.77
Service in shops	11	4.0	0.78	162	4.0	0.79
Access/transport to region	17	3.9	0.90	156	**4.1**	0.87
Car park facilities	18	**3.9**	0.87	191	3.6	1.04
Overall view of shopping	11	3.9	0.70	166	**4.0**	0.77
Quality of goods in shops	10	3.9	0.74	161	**4.0**	0.78
Range of shopping	11	3.7	0.79	167	**3.9**	0.86
Directional signage	20	3.7	1.22	195	**3.8**	0.97
Atmosphere in Restaurants/Cafes	14	3.6	0.84	181	**4.2**	0.69
Availability of public transport	5	**3.6**	1.67	65	2.8	1.17
Opening hours of Restaurants/Cafes	14	3.6	1.02	178	**3.9**	0.97
Value for money of shopping	11	3.5	0.82	162	**3.7**	0.82

Group with greater satisfaction highlighted

Figure 73: Trip type by satisfaction with aspects of hinterland

Aspect of the Hinterland	Only Destination			Longer Trip		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Personal safety/security	160	**4.7**	4.94	45	4.5	0.66
Friendliness of locals	171	4.4	0.73	51	**4.6**	0.73
Service in Restaurants/Cafes	152	**4.2**	0.83	47	4.1	0.84
Range of Restaurants/Cafes	165	4.2	0.81	50	**4.4**	0.69
Quality of food in Restaurants/Cafes	156	4.2	0.79	48	**4.3**	0.76
Atmosphere in Restaurants/Cafes	151	**4.2**	0.74	46	4.0	0.86
Overall assessment of Restaurants/Cafes	154	4.1	0.73	45	**4.3**	0.65
VIC - quality of service	80	4.1	0.99	39	**4.2**	1.09
Access/transport to region	140	4.0	0.93	36	**4.2**	0.89
Current level of development	160	**4.0**	0.91	37	3.8	0.91
Quality of goods in shops	133	3.9	0.87	40	**4.2**	0.62
Service in shops	134	3.9	0.87	41	**4.2**	0.74
Value for money in Restaurants/Cafes	157	3.9	0.94	49	**4.0**	0.79
Overall view of shopping	138	3.9	0.84	41	**4.2**	0.67
Range of shopping	139	3.8	0.88	41	**4.2**	0.79
Opening hours of Restaurants/Cafes	150	3.8	1.04	44	**3.9**	0.93
Directional signage	168	3.7	1.04	49	**3.9**	0.94
Value for money of shopping	135	3.6	0.89	40	**3.9**	0.71
Availability of tours	61	3.6	1.05	17	**3.9**	1.03
Car park facilities	162	3.6	1.04	51	**3.8**	1.06
Availability of events	68	3.6	1.15	20	**4.2**	0.88
Availability of public transport	56	2.8	1.16	17	**2.9**	1.48

Group with greater satisfaction highlighted

Figure 74: Visit by satisfaction with aspects of hinterland

Aspect of the Hinterland	First overnight visit			Visited overnight before		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Personal safety/security	110	**5.0**	5.91	92	4.3	0.84
Friendliness of locals	111	**4.6**	0.61	108	4.4	0.76
VIC - quality of service	65	**4.3**	0.94	52	4.0	1.11
Quality of food in Restaurants/Cafes	102	4.2	0.71	100	4.2	0.84
Range of Restaurants/Cafes	107	4.2	0.69	105	4.2	0.88
Service in Restaurants/Cafes	100	**4.2**	0.75	97	4.1	0.91
Access/transport to region	91	**4.2**	0.89	83	4.0	0.96
Overall assessment of Restaurants/Cafes	99	**4.2**	0.63	98	4.1	0.79
Atmosphere in Restaurants/Cafes	99	4.1	0.70	96	4.1	0.84
Current level of development	101	**4.1**	0.74	93	3.9	1.07
Service in shops	85	4.0	0.76	88	4.0	0.93
Overall view of shopping	89	**4.0**	0.74	88	3.9	0.89
Quality of goods in shops	83	4.0	0.74	88	4.0	0.92
Range of shopping	90	**3.9**	0.76	88	3.8	0.99
Availability of events	45	**3.9**	1.04	40	3.5	1.20
Value for money in Restaurants/Cafes	104	3.9	0.88	100	**4.0**	0.94
Availability of tours	35	**3.9**	1.03	41	3.5	1.08
Directional signage	115	**3.8**	0.98	100	3.7	1.08
Opening hours of Restaurants/Cafes	97	3.8	1.02	95	3.8	1.01
Car park facilities	108	**3.8**	1.01	103	3.5	1.09
Value for money of shopping	84	**3.7**	0.75	89	3.6	0.97
Availability of public transport	31	2.8	1.41	40	2.8	1.14

Group with greater satisfaction highlighted

Figure 75: Aspects of Hinterland most appealing

Aspect of the Hinterland	Count	Percent
Relaxed/peaceful/quiet atmosphere	224	89.2%
Natural Beauty/environment	190	75.7%
Scenery/Views	189	75.3%
Not overdeveloped commercial	153	61.0%
Friendliness of area/people	151	60.2%
Not too busy/congested	149	59.4%
Cleanliness	134	53.4%
Weather	124	49.4%
National Parks/Parks	123	49.0%
Restaurants/cafes	102	40.6%
Crafts and Markets	93	37.1%
Proximity to everything/convenient	69	27.5%
Lots to do/Variety of activities	66	26.3%
Lots to see and do/attractions	53	21.1%
Shops/Shopping	46	18.4%
Friends/Family here	31	12.4%
Family friendly/safe for kids	28	11.2%
Other	9	3.6%

Figure 76: Aspects of Hinterland most appealing by with/without children

Aspect of the Hinterland	Travelling with Children		Travelling Without Children	
	Count	Percent	Count	Percent
Relaxed/peaceful/quiet atmosphere	22	91.7%	198	90.4%
Friendliness of area/people	15	62.5%	134	61.2%
Weather	12	50.0%	110	50.2%
Cleanliness	12	50.0%	120	54.8%
Friends/Family here	7	29.2%	24	11.0%
Crafts and Markets	7	29.2%	84	38.4%
Family friendly/safe for kids	12	50.0%	16	7.3%
National Parks/Parks	10	41.7%	111	50.7%
Not overdeveloped commercial	11	45.8%	138	63.0%
Restaurants/cafes	5	20.8%	97	44.3%
Proximity to everything/convenient	4	16.7%	65	29.7%
Lots to do/Variety of activities	8	33.3%	57	26.0%
Shops/Shopping	1	4.2%	45	20.6%
Scenery/Views	16	66.7%	172	78.5%
Natural Beauty/environment	17	70.8%	170	77.6%
Not too busy/congested	12	50.0%	135	61.6%
Lots to see and do/attractions	7	29.2%	46	21.0%
Other	0	0.0%	8	3.7%

Figure 77: Origin by aspects of hinterland most appealing

Aspect of the Hinterland	Brisbane	Southeast Queensland	Other Queensland	Interstate	Overseas
Relaxed/peaceful/quiet atmosphere	94%	81%	83%	91%	94%
Friendliness of area/people	60%	54%	58%	70%	69%
Weather	49%	37%	42%	63%	75%
Cleanliness	58%	34%	42%	63%	69%
Friends/Family here	7%	12%	17%	31%	6%
Crafts and Markets	44%	24%	17%	47%	19%
Family friendly/safe for kids	12%	7%	0%	9%	19%
National Parks/Parks	50%	46%	33%	51%	69%
Not overdeveloped commercial	67%	54%	25%	67%	50%
Restaurants/cafes	45%	37%	25%	47%	31%
Proximity to everything/convenient	29%	22%	42%	35%	13%
Lots to do/Variety of activities	21%	27%	33%	44%	25%
Shops/Shopping	19%	15%	17%	23%	19%
Scenery/Views	82%	61%	75%	74%	94%
Natural Beauty/environment	81%	66%	75%	70%	100%
Not too busy/congested	69%	49%	33%	51%	69%
Lots to see and do/attractions	23%	15%	8%	26%	25%
Other	2%	7%	0%	2%	0%

Figure 78: Trip type by aspects of hinterland most appealing #

Aspect of the Hinterland	Only Destination		Longer Trip	
	Count	Percent	Count	Percent
Relaxed/peaceful/quiet atmosphere	171	**90.0%**	52	**89.7%**
Natural Beauty/environment	147	**77.4%**	42	**72.4%**
Scenery/Views	143	**75.3%**	45	**77.6%**
Not overdeveloped commercial	117	**61.6%**	35	**60.3%**
Not too busy/congested	115	**60.5%**	33	56.9%
Friendliness of area/people	111	**58.4%**	40	**69.0%**
Cleanliness	99	52.1%	35	60.3%
National Parks/Parks	88	46.3%	34	58.6%
Weather	87	45.8%	37	**63.8%**
Restaurants/cafes	81	42.6%	21	36.2%
Crafts and Markets	69	36.3%	23	39.7%
Proximity to everything/convenient	50	26.3%	18	31.0%
Lots to do/Variety of activities	44	23.2%	21	36.2%
Lots to see and do/attractions	38	20.0%	15	25.9%
Shops/Shopping	33	17.5%	13	22.4%
Family friendly/safe for kids	20	10.5%	8	13.8%
Friends/Family here	19	10.0%	12	21.1%
Other	6	3.2%	3	5.2%

Top 6 highlighted

Figure 79: Visit by aspects of hinterland most appealing

Aspect of the Hinterland	First overnight visit		Visited overnight before	
	Count	Percent	Count	Percent
Relaxed/peaceful/quiet atmosphere	114	88.4%	107	90.7%
Scenery/Views	101	78.3%	86	72.9%
Natural Beauty/environment	101	78.3%	86	72.9%
Friendliness of area/people	85	65.9%	64	54.2%
Not too busy/congested	79	61.2%	69	58.5%
Not overdeveloped commercial	77	59.7%	74	62.7%
Cleanliness	70	54.3%	62	52.5%
Weather	63	48.8%	59	50.0%
National Parks/Parks	63	48.8%	58	49.2%
Restaurants/cafes	46	35.7%	55	46.6%
Crafts and Markets	43	33.3%	48	40.7%
Lots to do/Variety of activities	40	31.0%	25	21.2%
Proximity to everything/convenient	38	29.5%	30	25.4%
Lots to see and do/attractions	34	26.4%	19	16.1%
Shops/Shopping	24	18.8%	21	17.8%
Friends/Family here	19	14.8%	12	10.2%
Family friendly/safe for kids	14	10.9%	14	11.9%
Other	6	4.7%	2	1.7%

Figure 80: Suggested improvements

Suggested improvements	Count	Percent
Improve/more parking	67	26.7%
Less/restrict development/commercialisation	58	23.1%
Improve/more/cheaper restaurants/cafes (& extended opening hours)	48	19.1%
Improve/more signage	44	17.5%
More walking trails	41	16.3%
Improve/more/cheaper transport	26	10.4%
Improve public facilities/parks	25	10.0%
Less crowded/touristy	24	9.6%
Improve roads/traffic	23	9.2%
Improve Other	17	6.8%
More/improved entertainment/activities	12	4.8%
More facilities for childen/teenagers	8	3.2%
More/improved visitor information	4	1.6%

Figure 81: Without/with children by suggested improvements

Aspect of the Hinterland	Travelling with Children		Travelling Without Children	
	Count	Percent	Count	Percent
Less/restrict development/commercialisation	5	20.8%	52	23.7%
Improve public facilities/parks	4	16.7%	21	9.6%
Improve/more/cheaper restaurants/cafes (& extended opening hours)	4	16.7%	44	20.1%
Improve roads/traffic	3	12.5%	19	8.7%
Improve/more signage	3	12.5%	41	18.7%
More walking trails	3	12.5%	36	16.4%
More facilities for childen/teenagers	3	12.5%	5	2.3%
Improve/more/cheaper transport	2	8.3%	23	10.5%
Improve/more parking	2	8.3%	65	29.7%
Less crowded/touristy	2	8.3%	21	9.6%
More/improved entertainment/activities	1	4.2%	10	4.6%
More/imporved visitor information	1	4.2%	3	1.4%
Improve Other	1	4.2%	16	7.3%

Figure 82: Origin by suggested improvements

Suggested improvements	Brisbane	Southeast Queensland	Other Queensland	Interstate	Overseas
Improve/more/cheaper transport	10%	5%	8%	11%	13%
Improve/more parking	33%	20%	8%	32%	13%
Improve roads/traffic	7%	12%	17%	16%	0%
Improve/more signage	17%	15%	8%	25%	13%
Less/restrict development/commercialisation	26%	22%	25%	25%	6%
Improve public facilities/parks	10%	10%	0%	14%	6%
Improve/more/cheaper restaurants/cafes (& extended opening hours)	21%	22%	25%	14%	13%
Less crowded/touristy	8%	15%	8%	14%	6%
More/improved entertainment/activities	5%	7%	0%	7%	0%
More/improved visitor information	1%	0%	0%	7%	0%
More walking trails	15%	22%	17%	16%	25%
More facilities for childen/teenagers	3%	2%	0%	2%	6%
Improve Other	7%	5%	0%	2%	31%

Appendices

Appendix A

Questionnaire used in Hinterland Visitor Survey

Sunshine Coast Hinterland Visitor Survey 2008

INSTRUCTIONS
- Please answer the questions listed below. If you have any difficulties, please ask the manager.
- Questions are to be answered by <u>one person only</u> in each travel party
- The questions are for visitors who do not reside in the Sunshine Coast Hinterland.

The "Sunshine Coast Hinterland" includes Glass House Mountains, Beerwah, Landsborough, Maleny, Witta, Conondale, Kenilworth, Montville, Hunchy, Flaxton, Mapleton, Woombye, Palmwoods, Eudlo, Mooloolah, Yandina, Eumundi, Cooroy, Pomona, Boreen Point & Kin Kin.

SECTION 1 – About your visit to this area

Q1. Is this trip to the Sunshine Coast Hinterland part of a longer trip?

1 No, the Sunshine Coast Hinterland is the only destination.
2 Yes.

If yes, could you please briefly describe the trip in terms of its length and destinations? (eg. Round Australia tour; Queensland coastal tour; visit to Sunshine Coast)

Q2a. How many <u>other</u> times have you travelled as an <u>Overnight</u> Visitor to the Sunshine Coast Hinterland over the last three years? (CIRCLE ONE ONLY)

1 Never before, this is my first overnight visit
2 1 – 3 times
3 4 or more times

Q2b. How many <u>other</u> times have you travelled as a <u>Day</u> Visitor to the Sunshine Coast Hinterland over the last three years? (CIRCLE ONE ONLY)

1 Never before, this is my first visit
2 1 – 3 times
3 4 or more times

Q3. On this trip how many nights have you spent or do you plan to spend in the Sunshine Coast Hinterland? (CIRCLE ONE ONLY)

1. 1 night
2. 2 nights
3. 3 nights
4. 4 nights
5. 5-7 night
6. 8-13 nights
7. 14+ nights

SECTION 2 –Motivation

Q4. What is the *main* purpose of your trip to the Sunshine Coast Hinterland? (CIRCLE ONE ONLY)

1 Holiday
2 Short break
3 Honeymoon
4 Wedding
5 A special public event (festivals/entertainment/sports)
6 Visiting friends or relatives
7 Business/employment/training
8 A convention or conference
9 Other ***(please specify)***

Q5. Do you recall seeing any advertising for the Sunshine Coast Hinterland <u>before leaving home</u>? (CIRCLE ONE ONLY)

1 No
2 Unsure
3 Yes

If 'Yes' please describe the advertisement

Q6. What information sources did you use when planning your trip to the Sunshine Coast Hinterland (including looking for accommodation, looking for things to do)? (CIRCLE ALL THAT APPLY)

1 None
2 Prior knowledge of region
3 Travel agent
4 Word of mouth
5 Motoring organisation
6 Internet sites
7 Travel Brochure/Travel Magazine
8 Travel book/guide
9 National or state tourism agency
10 Visitor Information Centre
11 Other ***(please specify)***

Q7 On the following scale of 1 to 5, where 1 equals Not Important and 5 equals Very Important, please indicate how important each of the following factors were in motivating you to stay overnight in the Sunshine Coast Hinterland. (CIRCLE ONE ONLY ON EACH ROW)

	Not important				Very Importnat
1. To spend time with my partner	1	2	3	4	5
2. To enjoy the peace and quiet of an uncrowded destination	1	2	3	4	5
3. To relax and rejuvenate	1	2	3	4	5
4. To indulge in a luxurious escape	1	2	3	4	5
5. To get off the beaten track	1	2	3	4	5
6. To experience nature	1	2	3	4	5
7. To experience local culture and heritage	1	2	3	4	5
8. To be active and adventurous	1	2	3	4	5
9. To socialise with friends or meet new people	1	2	3	4	5

Q8. Which of the following areas did you consider when thinking about where to go for <u>this</u> trip? (CIRCLE ALL THAT APPLY)

1 This was the only destination considered
2 Sunshine Coast (Coastal/beach area)
3 Gold Coast
4 Stanthorpe/Granite Belt
5 Byron bay & Hinterland
6 Northern Rivers of NSW
7 Cooloola
8 Brisbane
9 Other

Q9. Why did you choose the Sunshine Coast Hinterland for <u>this</u> trip rather than some other destination?

SECTION 3 –Activities

Q10. Which of the following places have you visited or do you plan to visit on your <u>current</u> trip (apart from passing through)? (CIRCLE ALL THAT APPLY)

1 Fraser Island/Hervey Bay
2 Gympie
3 Mary Valley
4 Tin Can Bay
5 Rainbow Beach
6 Noosa
7 Coolum
8 Eumundi
9 Nambour
10 Maroochydore
11 Mooloolaba
12 Caloundra
13 Brisbane
14 Gold Coast
15 Toowoomba/Darling Downs
16 Stanthorpe/Granite Belt

Q11. Which of the following places have you visited or do you plan to visit in the Sunshine Coast Hinterland on your <u>current</u> trip (apart from passing through)? Include where you are now. (CIRCLE ALL THAT APPLY)

1 Cooroy
2 Pomona
3 Kin Kin
4 Maleny/Witta/Conondale/Kenilworth
5 Glass House Mountains, Beerwah, Landsborough,
6 Montville/Hunchy/Flaxton/Mapleton
7 Woombye/Palmwoods/Eudlo/Mooloolah
8 Eumundi/Yandina
9 Other ***(please specify)***

Q12. What activities have you done or do you plan to do during your stay in the Sunshine Coast Hinterland? (CIRCLE ALL THAT APPLY)

1 Go to café/coffee shop
2 Eat at a restaurant
3 Visit a winery
4 Go shopping for pleasure
5 Purchase local gourmet food items
6 Visit an art/craft gallery
7 Visit markets
8 Visit a museum
9 Visit a National Park/State Forest/Reserve
10 Go on a walk
11 Go to a day spa/have a massage
12 Go horse riding
13 Go on an organised tour
14 Go fishing
15 Play golf
16 Go to the beach
17 Visit friends/relatives
18 Go on the Noosa Food Trail
19 Visit a major attraction (Australia Zoo, Ginger Factory, Underwater World, Big Pineapple etc)
20 None of the above

SECTION 4 –Accommodation

Q13 How did you book your accommodation in the Sunshine Coast Hinterland? (CIRCLE ONE ONLY)

1 Did not book ahead, just arrived
2 Stayed at the accommodation place before so booked before leaving home.
3 Booked direct with accommodation before leaving home (even though had never stayed there before)
4 Booked through a Travel Agent
5 I used the internet to find **and** book accommodation
6 I used the internet to find accommodation and then phoned them to book
7 Visitor Information Centre
8 Internet booking site (eg wotif.com/quickbeds.com etc)
9 Other ***(please specify)***

Q14. On the following scale of 1 to 5, where 1 equals Very Dissatisfied and 5 equals Very Satisfied, please indicate your satisfaction with the following aspects of accommodation in the Hinterland. Think about accommodation in general, not the specific place that you are staying in at the moment.
(CIRCLE ONE ONLY ON EACH ROW)

	Very Dissatisfied				Very Satisfied	
1. Accommodation – range	1	2	3	4	5	N/A
2. Accommodation – value for money	1	2	3	4	5	N/A
3. Accommodation – quality	1	2	3	4	5	N/A
4. Accommodation – service	1	2	3	4	5	N/A
5. Accommodation – availability	1	2	3	4	5	N/A
6. Accommodation – overall	1	2	3	4	5	N/A

SECTION 5 –Satisfaction

Q15a. Do you plan to return to the Sunshine Coast Hinterland in the next 3 years?

1 Yes
2 No

Q15b. If yes for what purpose?

1. Unsure
2 Day trip
3 Weekend/midweek
4 Holiday

Q16. On the following scale of 1 to 5, where 1 equals Very Dissatisfied and 5 equals Very Satisfied, please indicate your satisfaction with the following aspects of the Sunshine Coast Hinterland. (CIRCLE ONLY ONE ON EACH ROW)

	Very Dissatisfied				Very Satisfied	
1. Access /transport to the region	1	2	3	4	5	N/A
2. Restaurants/Cafes – range	1	2	3	4	5	N/A
3. Restaurants/Cafes value for money	1	2	3	4	5	N/A
4. Restaurants/Cafes – quality of food	1	2	3	4	5	N/A
5. Restaurants/Cafes – atmosphere	1	2	3	4	5	N/A
6. Restaurants/Cafes – service	1	2	3	4	5	N/A
7. Restaurants/Cafes – opening hours	1	2	3	4	5	N/A
8. Restaurants/Cafes – overall	1	2	3	4	5	N/A
9. Availability of Public Transport	1	2	3	4	5	N/A
10. Directional signage	1	2	3	4	5	N/A
11. Personal safety/security	1	2	3	4	5	N/A
12. Current level of development	1	2	3	4	5	N/A
13. Shopping – range	1	2	3	4	5	N/A
14. Shopping – value for money	1	2	3	4	5	N/A
15. Shopping – quality of goods	1	2	3	4	5	N/A
16. Shopping – service	1	2	3	4	5	N/A
17. Shopping – overall	1	2	3	4	5	N/A
18. Friendliness of locals	1	2	3	4	5	N/A
19. Car park facilities	1	2	3	4	5	N/A
20. Availability of tours	1	2	3	4	5	N/A
21. Availability of events	1	2	3	4	5	N/A
22. Visitor Information Centres – Quality of service	1	2	3	4	5	N/A

Q17. On a scale of 1 to 5, where 1 equals Very Dissatisfied and 5 equals Very Satisfied, please indicate your OVERALL satisfaction with the Sunshine Coast Hinterland.

	Very Dissatisfied				Very Satisfied	
Overall satisfaction	1	2	3	4	5	N/A

Q18 What aspects of the Sunshine Coast Hinterland appeal to you the most? (CIRCLE ALL THAT APPLY)

1 Relaxed/peaceful/laidback/quiet/atmosphere
2 Friendliness of the area/friendly people
3 Weather
4 Clean/cleanliness
5 Friends/family are here
6 Craft and Markets
7 Family friendly/safe for kids
8 National Park/Parks
9 Not overdeveloped/commercial
10 Restaurants/cafes
11 Proximity to everything/convenient location
12 Lots to do/variety of activities
13 Shops/shopping
14 Scenery/views
15 Natural beauty/environment
16 Not too busy/congested
17 Lots to see and do/attractions
18 Other ***(please specify)***

Q19. What improvements would you like to see to make the Sunshine Coast Hinterland more enjoyable for visitors such as yourself? (CIRCLE ALL THAT APPLY)

1 Improved/more/cheaper public transport
2 Improved/more parking
3 Improved roads/traffic
4 Improved/more signage
5 Less/restrict development/commercialisation
6 Improved/more public facilities/parks
7 Improved/more/cheaper restaurants/cafes (incl. extended opening hours)
8 Less crowding/touristy
9 More/improved entertainment/activities
10 More/improved visitor information
11 More walking trails
12 More facilities for children/teenagers
13 Other (***(please specify)***

Q20. What improvements would you like to see to make the shopping in the Sunshine Coast Hinterland shopping precincts more enjoyable for visitors such as yourself?

SECTION 6 – Some information about you

Q21. Where do you usually live?

Town/City/Suburb (Australia Only):

Postcode (Australia Only):

Country (Overseas only):

Q22. Please complete details <u>for one person in the travel party only</u>: (CIRCLE ONE ONLY)

a. Are you…

1 Male 2 Female

b. Which age bracket do you fall into? Are you…

1	Under 18	4	35 – 44	7	65 - 74
2	18 – 24	5	45 – 54	8	75+
3	25 – 34	6	55 – 64	9	Refused

Q23. How would you describe your immediate travel party? (CIRCLE ONE ONLY)

1 Yourself travelling alone
2 An adult couple (ie. partners in a relationship)
3 A family group, parents and children
4 Friends/relatives travelling together with children
5 Friends/relatives travelling together without children
6 Independent adults travelling in a large group (no children)
7 Independent adults travelling in a small group
8 Other ***(please specify)***

Q24. What is your approximate annual <u>household</u> income *before tax*? If from overseas please estimate in Australian dollars. (CIRCLE ONE ONLY)

1 Under $20,000
2 $20,000 to $39,999
3 $40,000 to $59,999
4 $60,000 to $79,999
5 $80,000 to $99,999
6 $100,000 to $119,999
7 $120,000 to $139,000
8 $140,000 to $159,000
9 $160,000+
10 Prefer not to disclose

THANK YOU FOR YOUR TIME.
WE HOPE YOU ENJOY YOUR STAY IN THE SUNSHINE COAST HINTERLAND.

Accommodation Provider to complete at conclusion of interview

Time Completed (please circle): AM PM
Day/Date Completed:_____________
Location of Interview: ____________
Type of Accommodation:

1 Rented apartment /holiday flat	2 Motel
3 Hotel/Resort	4 Rented house
5 B&B	6 Youth/Backpacker hostel
7 Caravan/cabin/tent	8 Guest house
9 Cottage/cabin (not in park)	10 Farm stay
11. Other ***(please specify)***	

Business Name: ________________________

Business Contact Number: ___________________

Appendix B

Alternative locations considered

Almost half (47%) of overnight visitors considered alternative destinations when planning their visit to the Hinterland. A list of alternative destinations that they may have considered was presented to visitors and the results can be seen in Figure 35 (p19). Some visitors nominated alternative locations that were not listed on the questionnaire. The alternative destinations that they nominated are presented on the next page.

Alternative locations considered

Brisbane city hotel stay
Buderim
Bundaberg Atherton Tablelands, Cairns, Bunya Mountains
Bunge
Definitely wanted to include Hinterland
Far North Queensland
Fiji
Fraser Island
Gold Coast Hinterland
Gold Coast Hinterland
Gold Coast Hinterland/Tamborine Mountains
Harvey Bay, drive from Sydney to Brisbane & Maleny
Lamington
New Zealand
Somewhere for horse riding for my daughter
South Burnett
Stradbroke Island
Sydney
Sydney, Alice Springs, Fraser Island
Tamworth, Southwest Rocks, Nambucca Heads, Brunswick Heads

Appendix C

Detailed Motivations

In an attempt to understand more about the motivation for travelling to the Hinterland, visitors were asked the following question:

"Why did you choose the Sunshine Coast Hinterland for this trip rather than any other destination?"

This question was designed to help us understand why they chose this destination in particular, rather than why they chose to be on holiday. Other questions were included to understand their motivation for going on holiday or going somewhere. This sought to find out what factors affected their choice of specific destination.

The responses are outlined in the table on the next few pages. Individual responses have been grouped to provide an understanding of the range of motives that are found amongst overnight visitors. A few observations can be made about the results:

- There is a great diversity in the factors that affect that choice.
- The most common factor is proximity to home.
- The presence of a specific personal connection to the Hinterland is evident (eg. having family or friends there; attending a personal event there; etc.).
- The role of novelty is important to first time visitors.
- Repeat visitors expressed the role of a satisfactory previous experience.
- There are a number of aspects of the destination that are themselves attractors, including its naturalness, peace and quiet nature, beautiful vistas, etc.
- Some have chosen the accommodation rather than the area;
- Only a few visitors suggested that their choice had been influenced by advertising or information provision.

Verbatim Detailed Motives

Part of an extended trip

Different way
Part of the overall trip
Important part of round trip
Between Bundaberg and Coffs harbour
Passing through the region and wanted a change from the coast
First stop
Didn't - part of trip

Looking for a couple of different stops on our trip - been mainly
staying at costal parks

Specific things in area

Eumundi Markets
Bribie Island
See Mary Valley and rural areas
To visit Fraser Island
To see the Glass House Mountains

Activity Related

Better for motorbike riding
Brooloo Park - horse riding looked good
Bush walks/Falls
The opportunity to hike in the hills
walking trails

Like mountains

Wanted to go to the Hinterland
Wanted to head to the mountains
Wanted to see the Glasshouse Mountains

Beauty of area

Natural beauty
Scenery
Scenic and peaceful
Natural beauty

Public event

Gympie CM muster
We are heading to the Gympie Muster for 2 days
To attend Gympie muster
Because the muster was here

Peace and Quiet

For peace and quiet
Peace & quiet
Peace and quiet
Peaceful
Peaceful and tranquil

Peaceful, beautiful and cold
Have been here before and liked the peace and tranquillity
More peaceful, especially this time of year

Because it looked peaceful, no one around, close to you
Seclusion, privacy and nature
Pleasant and relaxing
To experience peace and quiet with my partner

Beauty & atmosphere

Because of its charm & beauty
Beautiful Scenery, away from busy costal strip
Country atmosphere
Friends, beautiful scenery & abundant birds & whales
Unknown but beautiful

Business related

Business needs
Business trip, location assigned
Work location
Work related

Recommended

It was recommended to us
Recommendation
Recommendation from a friend
Recommended
Recommended by family member
Word of mouth
Friends on Sunshine Coast referred destination
Article in the Q magazine and we have not stayed at Maleny before
Have heard that it is absolutely gorgeous & I had to go
Sounded interesting
Reputation

Prior experience

Previous good experience - peace and quiet
Previous visit
Prior experiences
Prior experiences
Prior Knowledge
Previous day trips
Previous experience
Previous experience
Stayed here before, every year for 10 years
Stayed previously
Been here before
Been here before and liked it
Been there before
Stayed here before - always very hard to get accomm
Natural beauty
Know destination/accommodation
We Enjoyed the area
Enjoyed previous stays
Have been before and enjoyed the experience

Love the area

Like it
Because I wish I could live here
Always loved it
Favourite destination

Novelty

Because I hadn't been before
New adventure
Not experienced this area before
Something different. Like the area.
Somewhere different
We came to experience new places
We have never been out here before
A different place to go
Never been here before and we were told it was nice
For a change
To experience a different environment
Been to other places
To see somewhere we've not been before

Love the area

We love it here
We love Montville
We like the Hinterland
Love Maleny
Love the location
Love this area

Gift Voucher or Win

Won a competition
Won weekend away
We were given a gift voucher

Accommodation related

Accommodation available in the right location
Only place we could get
B&B
We absolutely love "Seaview cabins' at Montville
Accommodation was very appealing
Wanted a farm stay
Crookneck retreat
Due to type of accommodation present
Persuaded by accommodation
It looked nice and was available on short notice
Word of mouth referral from brother on accommodation
Found accommodation for a bargain on wotif.com
Not stayed here before - the idea of a cottage weekend appealed
The Blue Summit Cottages accommodation
This place is what I wanted
The property presented very well on line
What the accommodation had on offer
To get away from crowded caravan parks
Wanted to stay at Buderim White House Grand Manor
Because of the presentation for the retreat
B&B

Rattler Train

Rattler Train
Train
Wanted to ride valley rattler

Weather

Climate & nature
Weather
The weather

Proximity

Not too far from Brisbane
Climate & proximity to Brisbane
Close proximity to Brsibane. Beautiful. Peaceful
Close proximity to where we live
Close to Brisbane yet seems far away
Close to home
Close to home
Close to home
Close to home
Close to home
Close to home
Close to home, yet isolated
Closer
Convenience
Convenience and to see family
Convenience for work travel
Convenience of location
Convenient
Distance and price
Distance from Brisbane
Distance to Brisbane, heard it was nice
Easy drive
Close to home and yet feels so far away. Love it here
Location
Location
Not a lot of distance from home
Not far away
Not too far from home
Not too far from home
Proximity
Proximity to Brisbane
Proximity to Brisbane
Proximity to Brisbane (home) and quiet location
Proximity to Brisbane. Views.
Proximity to home
Shorter distance from home
Shortest time travelling.
Simple, closeness, good area

Family Related

Family
Friends and family
Relatives live at Mapleton
Visiting family
Visiting friends
This is where the friends and family are
To spend time with family
Family
To show family from overseas
It is where my mother was born
To visit friends - also never been here before

Personal event

Engagement party
Here as guests for wedding
Invitation to a wedding in Maleny
60th Birthday party of a friend
Personal and family reasons
The wedding is here
Specific occasion
Wedding
Wedding
Wedding
Wedding
Wedding
Wedding
Wedding nearby we are attending
Wedding was here
Wedding was here
Birthday gathering for 6 couples every year not far from Brisbane
Yearly reunion with friends
Work invite
Tradition with friends
Friends have met for past 8 years at this destination

Less crowded

Not overpopulated
Quiet
Quiet & peaceful with friendly hosts
Quiet getaway - away from people
Quieter than Gold Coast & further away from Brisbane
Relax, tranquillity, nature
We like the Hinterland and also the absence of too many people
We wanted a quiet getaway
Less people
Surroundings/not busy
Preferred area, not so crowded
Was looking for a quiet place to relax and take a break from city
Green, beautiful, green, less traffic

Other

Get away from city for relaxing weekend
Always wanted to visit Hinterland
Personal interest
Unique
Value for money
Views at treetops Seaview
To experience the area for an extended period of time
Costal and rural location plus the sunshine
Live on the Gold Coast so rather come here
More variety/places to visit
We were going to Brisbane and did not want to go the Gold Coast (from Airlie Beach on trip to BNE)

Appendix D

Verbatim suggested improvements

Visitors were asked to nominate specific improvements that they would like to see in the Hinterland. These are listed in the table on the next page.

Specific infrastructure proposals

Footpaths to Mapleton from Montville
Kenilworth - Maleny Road needs upgrading
More improved foot paths as some are unsafe
More circuit walks would be good
More mountain bike trails
Better range of accommodation

Retail related

Less shops selling junk
More mens shops

Traffic related

Maleny too crowded. Didn't stop because of backward parking.
Traffic from Brisbane - terrible

Leave it as it is

Nothing it is great the way it is
Ok as is
Very Happy with it now
Leave things how they are
Enjoying the Hinterland as it is
All ok

Other

Warmer nights!
Vegetarian food availability
Legal naturist beaches needed

Appendix E

Verbatim suggestions regarding shopping

Visitors were asked to nominate specific improvements that they would like to see to make shopping in the Hinterland shopping precincts more enjoyable. These are listed in the table on the next page.

Increase range of shops

Bigger range of shops.
More variety,
Variety of shops

More variety

More variety
More variety
More variety
More variety
More variety of shops

Market /Stalls

A market
I like the roadside stalls

Specific suggestions regarding range

More for men
More mens shops
More indoor/outdoor furniture, small pieces of furniture something different, more cottage style furniture
More range

Price of goods

Some shops are over priced
Some items were overpriced
Realistic prices.
more competitive prices
Reduced cost

Local produce

Larger emphasis on local goods. Marketing this as a reason to come here.
More natural products/organic foods
less 'made in China',
Local made items
Less imports. More local products.
Too much rubbish for sale
Less trendy, more original

Retain small size

Don't make them too big
Keep it small
No major retailers
Get rid of them, have local shops, IGA etc
Let's keep it simple! We already have one Gold Coast
No great big shopping malls
I would not like a mall or shopping centre. Do not be like the coast or city
I love it how there are lots of little shops and family owned. A massive shopping centre would ruin the feel of the "getting away"

Leave it as it is

None
None
None
Nothing
Nothing
Nothing - it's fine
Ok as is
Ok as is
I love it the way it is
All ok
Nice the way it is
It is fine just the way it is
Change nothing
Good as it is
None, I enjoy the more personable small shops as they are
Leave it as is
There is already a huge variety bordering on excess.
No more needed

Parking Related

Montville very difficult to park for shopping
Adequate parking
Better parking
Better parking
Better Parking at Montville
More parking
More parking
More parking near shops and cafes
Increased parking facilities
Easy parking
More parking only for Montville
Car parking
Parking
Parking bays for larger vehicles
Parking
I hate reverse parking
Some improvements in parking

Other

Range & professionalism of the presentation & service
Road signage could be more directive
Need route to bypass Montville if passing through
Toilets
Advertise more in SE QLD to showcase the area