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# Caloundra Visitor Survey

January 2009





## Executive Summary

The Caloundra visitor survey is conducted each year to gain an understanding of the tourism market that is attracted to Caloundra. Caloundra is situated in the southeast corner of Queensland at the southern end of the Sunshine Coast Tourism Region. Throughout this report 'Caloundra' refers to the former Caloundra City Council area, which includes Beerburrum, Beerwah, Caloundra itself, Conondale, Currimundi, the Glasshouse Mountains, Golden Beach/Pelican Waters, Kawana, Landsborough, Maleny, Minyama, Mooloolah and Witta. This region is now part of the Sunshine Coast Regional Council Local Government Area.

The report begins with a profile of visitors to the whole Sunshine Coast to place the data collected in the visitor survey into context. This data indicates that 91% of visitors to the Sunshine Coast come from within Australia, especially from within Queensland. It also indicates that during 2008 the number of international visitors decreased like many other regions of Queensland. While most visitors to the Sunshine Coast are on holidays, just under one third of domestic visitors are visiting friends or relatives. A much smaller proportion of international visitors are visiting friends or relatives.

The survey of visitors to Caloundra found that nearly three quarters of visitors come from Queensland, the largest proportion are travelling as a family group and represent all income groups. The proportion of visitors in the highest income groups has tended to increase in recent years. The largest age group is between 35 and 54 years. Most visitors, especially those who stay for longer periods of time, tend to travel as a family group (adults and children). First time visitors, however, are almost as likely to be adult couples. Caloundra attracts only a small number of visitors travelling as independent adults in a large group.

Most visitors go to Caloundra for leisure or holidays, although visiting friends or relatives is a very important secondary purpose. Very important is the desire to relax and rejuvenate in the context of a family holiday, particularly amongst those from Brisbane. Indulgence and luxury is not as important as in other destinations. Overseas visitors place greater emphasis on Caloundra providing the opportunity to enjoy the peace and quiet of an uncrowded destination.

Many visitors do not use any official information when planning their trip and many claim to rely on prior knowledge of the area, especially amongst those who are repeat visitors and come from Brisbane. The internet is a particularly important source of information amongst those from interstate and overseas, whilst overseas visitors also use travel brochures, travel magazines and travel guides. The internet is being used to find and book accommodation at a lower rate than in the 2008 Wave, but it is now more in line with the steady increase noted in the previous surveys. Just over one third of visitors recall seeing some form of advertising before leaving home which represents a substantial increase on the 2008 Wave. The highest recollection level is amongst those who come from the Southern Darling Downs and Toowoomba.

Over four out of five have visited Caloundra before, with this proportion being greatest amongst those from Brisbane and less amongst those from overseas and interstate (except Victoria). Just over a third of visitors are on a day trip and of those who stayed overnight almost two thirds stay over 5 nights. The most popular form of commercial accommodation is a rented apartment or holiday flat, especially amongst those over 45 years of age and amongst the highest income group. Nine out of ten visitors book their accommodation before leaving home, except those who are in the youngest age group and/or are travelling alone.

The most popular activity undertaken by visitors is to go to the beach, especially amongst those on their first visit. Going to a café or coffee shop is also a popular activity, especially amongst more frequent visitors and those that are staying for longer periods of time. Overseas and interstate visitors are more likely to visit attractions such as Australia Zoo and AussieWorld.

Visitors are satisfied with most aspects of their experience in Caloundra, and their overall satisfaction is very high. The level of satisfaction with many aspects of their experience has risen since the last Wave, including visitor satisfaction with signage, the tourist information available and public transport. This high level of satisfaction is reflected in a high intention to return, even amongst interstate and some overseas visitors.



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## Introduction

### What is this report all about?

The Caloundra Visitor Survey was undertaken by Tourism Sunshine Coast, in partnership with Caloundra Tourism over the January 2009 holiday period. It is one part of a region-wide research 'Wave' that Tourism Sunshine Coast has managed on behalf of its partners Caloundra Tourism, Discover Maroochy, Tourism Noosa and the Cooloola Regional Development Bureau.

The report is designed to develop a better understanding of the existing markets for Caloundra which, in turn, will help to guide the development of tourism strategies for that part of the Sunshine Coast region. It is anticipated that information gathered will be used by Caloundra Tourism, Tourism Queensland, Tourism Sunshine Coast and tourism operators to optimize tourism in the area and to provide input into future development and marketing strategies. The specific objectives of the research are:

- to profile visitors to Caloundra in terms of demographics and travel behaviour;
- to determine the effectiveness of certain marketing activities;
- to determine what motivates people to visit Caloundra;
- to measure visitor satisfaction with specific aspects of Caloundra;
- to track the profile and opinions of visitors to Caloundra over time.

The report presents the findings of the January 2009 Caloundra Visitor Survey. A similar report is available for each of the partner destinations and one that aggregates the data for the whole region.

### How can you use this report?

The ultimate value of this report is to enable the reader to better manage and market Caloundra as a tourism 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 can occur.

#### DISCLAIMER

When using this information you acknowledge that the data is provided by Tourism Sunshine Coast (TSC) to you without any responsibility on behalf of TSC or its consultants or agents. You agree to release and indemnify TSC and its consultants or agents for any loss or damage that you may suffer as a result of your reliance on this information. TSC and its consultants or agents do not represent or warrant that this data is correct, complete or suitable for the purposes for which you wish to use it.

## Methodology

Throughout this report the name 'Caloundra' refers to the former Local Government Area of Caloundra\*, which is at the southern end of the Sunshine Coast Tourism Region.

Caloundra includes a wide diversity of tourism destinations including Caloundra itself, Beerwah, Currimundi, the Glasshouse Mountains, Golden Beach/Pelican Waters, Landsborough, Maleny and Witta. 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, Caloundra, Maroochy, Noosa and Cooloola. The questionnaire included questions about visitor demographics, travel behaviour, motivations and satisfaction. Interviewing was conducted from 10 January until 20 January 2009, coinciding with the region's high tourist season.

Over 250 respondents were targeted for the project. This was achieved with 263 surveys being completed. This is comparable with the number collected in previous 'Waves' and provides a large enough sample for conclusions to be drawn. Tourism Sunshine Coast managed the collection process, including the training of individual interviewers. Interviewers recruited respondents by randomly intercepting passers-by at various locations around Caloundra. These locations were chosen to obtain a good cross-section of visitors to various parts of the City. Residents of Caloundra were not eligible to participate in the research. The locations of interviewing and the proportion of interviews completed at each location are presented in Figure 1. That figure also provides similar information for the January 2008 Wave.

Data from completed questionnaires were analysed using SPSS statistical analysis software. The results are presented as tables and graphs and in many 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, Length of Stay and Visitation. Comparisons with the January 2008 Wave have been included where the data is available.

Figure 1: Location of Interviews

| Interview Location   | 2009 |       | 2008 |       |
|----------------------|------|-------|------|-------|
|                      | n    | %     | n    | %     |
| Kings Beach          | 78   | 29.7% | 60   | 26.0% |
| Moffat Beach         | 48   | 18.3% | 34   | 14.7% |
| Golden beach         | 37   | 14.1% | 21   | 9.1%  |
| Bulcock Street/Beach | 58   | 22.1% | 100  | 43.3% |
| Dicky Beach          | 42   | 16.0% | 13   | 5.6%  |
| Happy Valley         | -    | -     | 3    | 1.3%  |
| Total                | 263  | 100%  | 231  | 100%  |

\* Caloundra ceased to exist when it was amalgamated into the Sunshine Coast LGA in March 2008.



# Sunshine Coast Regional Visitor Profile



This section of the report provides an overview of tourism performance on the Sunshine Coast as a whole. It is drawn from a variety of sources including the National Visitor Survey, the International Visitor Survey and the Roy Morgan Holiday Tracking Monitor. Data collected from these sources is not available at the Local Government Area level due to limitations of sample size. Despite this, the provision of this information is useful as it helps to place Caloundra into its regional context.



## Visitors and Expenditure

- In 2008 Queensland received 23.7% (16,711,000) of the domestic overnight trips that were taken in Australia in the year ended December 2008. The Sunshine Coast received 2,792,000 (17%) of these trips taken in Queensland.
- Queensland received 24.3% (\$16.7B) of the \$13.2 billion spent in Australia by international tourists in the year ended December 2008. Of the \$44.6 billion spent in Australia by domestic overnight visitors, Queensland received 27.8% of this.

Figure 2: Visitors, Visitor Nights and Expenditure on the Sunshine Coast

|                                      | Domestic Day Trip Visitors to the Sunshine Coast | Domestic Overnight visitors to the Sunshine Coast | International Visitors to the Sunshine Coast |
|--------------------------------------|--|---|--|
| Visitors (YE Dec 2008)               | 4,738,000  | 2,792,000   | 279,000                                      |
| Visitor nights (YE Dec 2008)         | n.a.   | 10,870,000  | 2,333,000                                    |
| Average length of stay (YE Dec 2008) | n.a.   | 3.9 nights  | 8.4 nights                                   |
| Expenditure (YE Dec 2008)*           | \$425 million                                    | \$1,811 million                                   | \$185 million                                |
| % of total expenditure in Queensland | n.a.   | 15%   | 5%   |
| Average expenditure per visitor      | \$96   | \$719   | \$727  |
| Average expenditure per night        | n.a.   | \$160   | \$85   |

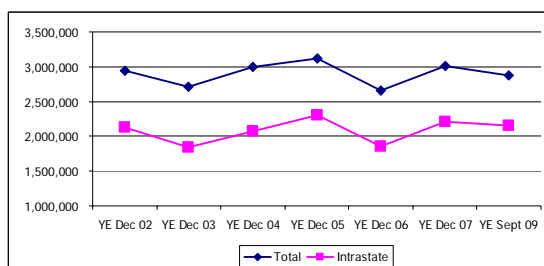
[SOURCE: TRA Visitor Expenditure by Domestic and International Visitors in Australia's Regions; National Visitor Survey; International Visitor Survey]

\* All expenditure data refers to the year ended December 2008 as this was the latest available at the time of publication.

## Visitors

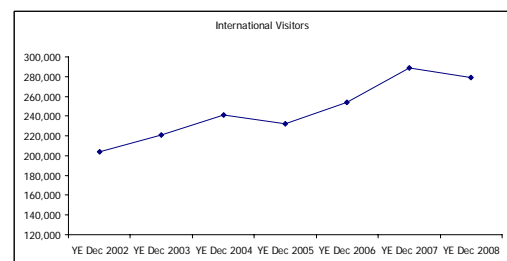
- The Sunshine Coast received 2,792,000 domestic overnight visitors in the year ended December 2008. This represents a slight decline (7.7%) on the number in the 2007 calendar year.
- The Sunshine Coast had the 7th largest number of visitors (domestic and international combined) of all regions in Australia in the year ended December 2008.
- One quarter of domestic overnight visitors (25%) were from interstate. The remainder (75%) came from within Queensland with 46% of the total coming from Brisbane.
- The Sunshine Coast received 279,000 international visitors in the year ended December 2008. This represents 19% of the total number of visitor nights to the Region. The number has declined by 3.5% since the previous calendar year but the average length of stay has increased slightly.

Figure 3: Domestic Overnight Visitors (000s)



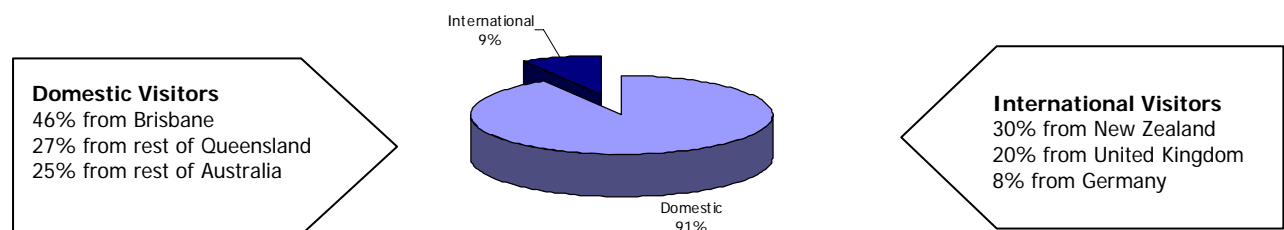
[SOURCE: NVS 2002-2008]

Figure 4: International Overnight Visitors



[SOURCE: IVS 2002-2008]

Figure 5: Origin of Overnight Visitors– Year Ended September 2008



## Profile of Overnight Visitors

Figure 6: Purpose of Visit to the Sunshine Coast– YE December 2008

| Purpose of Trip                | Domestic Overnight Visitors | International Overnight Visitors |
|--------------------------------|-----------------------------|----------------------------------|
| Holiday or Leisure             | 62.7%                       | 79.4%                            |
| Visiting Friends and Relatives | 28.1%                       | 16.1%                            |
| Business                       | 7.5%                        | 2.4%                             |
| Other                          | 1.6%                        | 2.1%                             |

[SOURCE: NVS and IVS YE Dec 2008]

Figure 7: Sunshine Coast Overnight Domestic Visitor Profile– YE December 2008

|  |  |
|--|--|
| Travel Party<br>(% of visitors)            | <ul style="list-style-type: none"> <li>• 31% travelling as an Adult Couple</li> <li>• 29% as a Family (parents and children)</li> <li>• 21% with Friends and Relatives</li> <li>• 16% travelled alone</li> </ul>   |
| Accommodation<br>(% of visitor nights)     | <ul style="list-style-type: none"> <li>• 30% stayed with Friends or Relatives</li> <li>• 25% rented a House, Apartment, Flat or Unit</li> <li>• 21% stayed in a Hotel, Resort, Motel or Motor Inn</li> <li>• 9% stayed in a Serviced Apartment</li> </ul>  |
| Most Popular Activities<br>(% of visitors) | <ul style="list-style-type: none"> <li>• 61% ate at a restaurant</li> <li>• 53% went to the beach (including swimming)</li> <li>• 41% visited Friends or Relatives</li> <li>• 31% went shopping for pleasure</li> <li>• 28% general sightseeing</li> </ul> |

[SOURCE: NVS YE Dec 2008]

## Profile of Day Trippers

- Just over half (52%) of all domestic day-trippers to the Sunshine Coast were from Brisbane.
- Sixty-one percent of these day-trippers went to the Sunshine Coast for holiday or leisure purposes, while a little under a quarter (22%) was visiting friends or relatives.

Figure 8: Activities Participated in by Day-Trippers to the Sunshine Coast– YE December 2007

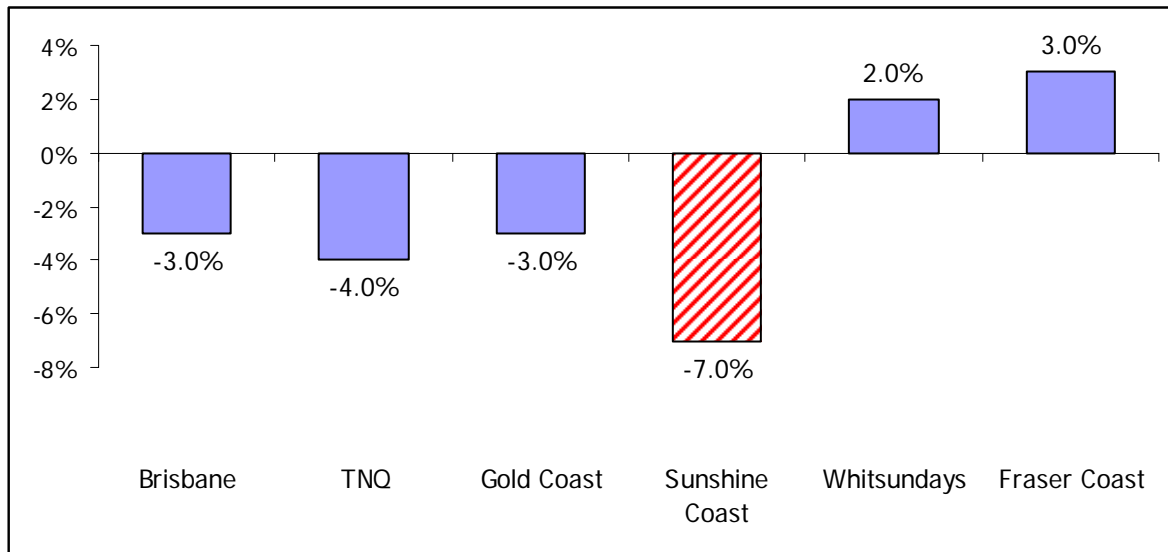
| Activity                             | Percentage of Day-Trippers to the Sunshine Coast |
|--------------------------------------|--|
| Eat out at a restaurant              | 45%  |
| Go to the beach (including swimming) | 28%  |
| Visiting friends and relatives       | 26%  |
| Go shopping for pleasure             | 22%  |

[SOURCE: NVS YE Dec 2008]

## International Performance

- The Sunshine Coast has experienced a decline in the number of international visitors (-7%) during the period September 2007 to September 2008. As can be seen in Figure 9 most other Queensland destinations have experienced a similar decline in international visitors.
- The average length of stay of international overnight visitors declined slightly from 8.7 to 8.2 nights.
- The main source countries remain New Zealand, United Kingdom and Europe.

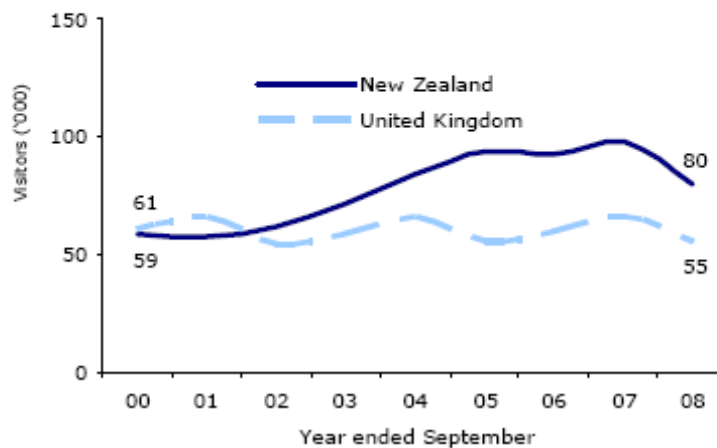
Figure 9: Annual Growth in International Visitors in Queensland Regions– YE September 2008



SOURCE: Tourism Queensland International Tourism Snapshot

Figure 10: Annual Growth in Visitors from NZ and UK (2000-2008)

### New Zealand and United Kingdom visitors to Sunshine Coast YE September 00-08



SOURCE: Tourism Queensland Tourism Snapshot

## Commercial Accommodation

- The Survey of Tourist Accommodation (STA) shows the average room occupancy in Sunshine Coast establishments declined slightly from 59.7% in year ended September 2007 to 59.5% in year ended September 2008.
- The yield (takings per available room night) increased by 1.9% from \$87.88 to \$88.17 between September 2007 and September 2008, which compensated for the slight decline in occupancy.

Figure 10: Sunshine Coast Commercial Accommodation – YE September 2008

| All Establishments               |           |       |
|----------------------------------|-----------|-------|
| Rooms nights available           | 3,868,581 | +1.8% |
| Room nights occupied             | 2,301,141 | -0.2% |
| Average Room Occupancy rate      | 59.5%     | -1.2% |
| Average daily room rate          | \$148.23  | +3.9% |
| Takings per room night available | \$88.17   | +1.9% |

[SOURCE: Australian Bureau of Statistics, Survey of Tourist Accommodation]





# Overview of Findings for Caloundra



Figure 13: Summary of Key Results over Time (All Visitors) in Caloundra

| ALL VISITORS  | January 2006   | January 2007  | January 2008  | January 2009  |
|---|--|---|---|---|
| Where do they come from?                                  | 70% Queensland<br>(52% Brisbane)   | 65% Queensland<br>(42% Brisbane)  | 74% Queensland<br>(54% Brisbane)  | 81% Queensland<br>(52% Brisbane)  |
| Who do they travel with?                                  | 51% travel as a family group   | 47% travel as a family group  | 59% travel as a family group  | 51% travel as a family group  |
| What is their gross annual household income?              | 61% earn under \$80,000 (20% earn \$60,000 to \$79,999)  | 56% earn under \$80,000<br>17% \$120,000+   | 50% earn under \$80,000<br>17% \$120,000+   | 49% earn under \$80,000<br>21% \$120,000+   |
| What is their age?  | 30% 35 to 44 years   | 31% 35 to 44 years  | 37% 25 to 34 years  | 32% 35 to 44 years  |
| What motivated them to visit?                             | 83% want to relax and rejuvenate   | 83% want to relax and rejuvenate  | 90% want to relax and rejuvenate  | 86% want to relax and rejuvenate  |
| What information sources did they use to plan their trip? | 72% use no information sources or had prior knowledge of Caloundra   | 68% use no information sources or had prior knowledge of Caloundra  | 68% use no information sources or had prior knowledge of Caloundra                        | 77% use no information sources or had prior knowledge of Caloundra                            |
| Do they recall seeing advertising?                        | 28% recall seeing advertising  | 38% recall seeing advertising   | 24% recall seeing advertising   | 34% recall seeing advertising   |
| Why do they visit?  | 83% for holiday or leisure purposes  | 78% for holiday or leisure purposes   | 90% for holiday or leisure purposes   | 81% for holiday or leisure purposes   |
| How many times have they visited in the last three years? | 52% have visited 4 or more times   | 50% have visited 4 or more times  | 52% have visited 4 or more times  | 58% have visited 4 or more times  |
| How long do they stay?                                    | 70% stay at least one night<br>30% stay 5 to 7 nights  | 77% stay at least one night<br>43% stay 5+ nights   | 73% stay at least one night<br>71% stay 5+ nights   | 66% stay at least one night<br>45% stay 5+ nights   |
| What commercial accommodation do they use?                | 34% rent an apartment or flat  | 28% rent an apartment or flat   | 48% rent an apartment or flat   | 43% rent an apartment or flat   |
| How do they book their commercial accommodation?          | 23% book direct leaving home<br>23% book direct as have stayed there before<br>23% use internet to find and book | 16% book direct before leaving home<br>22% book direct as have stayed there before<br>14% use internet to find and book | 25% use internet to find and book<br>22% book direct as have stayed there before          | 17% use internet to find and book<br>37% book direct as have stayed there before              |
| What activities do they do?                               | 91% go to the beach  | 74% go to the beach   | 40% go to the beach   | 95% go to the beach   |
| What are they most satisfied with?                        | 95% beaches<br>89% safety/security<br>85% friendliness of locals   | 94% safety/security<br>91% beaches<br>89% friendliness of locals  | 84% are satisfied with attractions (service)<br>84% are satisfied with shopping (overall) | 84% are satisfied with the tourist information on Caloundra<br>87% are satisfied with signage |
| What are they most dissatisfied with?                     | 48% nightlife or entertainment   | 26% nightlife or entertainment  | 22% are dissatisfied with public transport  | 7% are dissatisfied with the beaches (overall)  |
| Do they intend to return?                                 | 83% intend to return   | 77% intend to return  | 89% intend to return  | 91% intend to return  |

Figure 14: Summary of Key 2009 Results by Previous Visitation in Caloundra

|  | First Time  | One to Three Times   | Four Times or More   |
|--|---|--|--|
| Where do they come from?                                 | 30% Queensland (10% Brisbane)                           | 73% Queensland (46% Brisbane)                                      | 95% Queensland (63% Brisbane)                                      |
| Who do they travel with?                                 | 35% Adult Couple  | 60% Family group   | 49% Family group   |
| What is their gross annual household income?             | 26% earn \$100,000+                                     | 39% earn \$80,000-\$119,999  | 29% earn \$60,000-\$99,999   |
| What is their age?                                       | 50% less than 45 years old                              | 68% 25 to 54 years   | 12% over 65 years  |
| What motivates them to visit?                            | 83% to relax and rejuvenate                             | 91% to relax and rejuvenate  | 93% to relax and rejuvenate  |
| What information sources do they use to plan their trip? | 40% internet  | 73% use no information sources or had prior knowledge of Caloundra | 92% use no information sources or had prior knowledge of Caloundra |
| Do they recall seeing advertising?                       | 20% recall seeing advertising                           | 30% recall seeing advertising                                      | 40% recall seeing advertising                                      |
| Why do they visit?                                       | 73% holiday or leisure purpose                          | 85% holiday or leisure purpose                                     | 81% holiday or leisure purpose                                     |
| How long do they stay?                                   | 33% Day Visitor   | 46% 5+ nights  | 44% 5+ nights  |
| What percentage stay with friends and relatives?         | 27% stay with friends and relatives                     | 21% stay with friends and relatives                                | 24% stay with friends and relatives                                |
| What commercial accommodation do they use?               | 36% stay in a motel/resort                              | 59% rent apartment or holiday flat                                 | 36% rent apartment or holiday flat                                 |
| How do they book their commercial accommodation?         | 56% use internet to find and book                       | 23% made direct booking (stayed before)                            | 48% made direct booking (stayed before)                            |
| What activities do they do?                              | 100% go to the beach                                    | 95% go to the beach  | 93% go to the beach  |
| What were they most satisfied with?                      | 93% are satisfied with tourist information on Caloundra | 94% are satisfied with tourist information on Caloundra            | 94% are satisfied with tourist information on Caloundra            |
| What is their overall level of satisfaction?             | 80% are Satisfied and Very Satisfied                    | 94% are Satisfied and Very Satisfied                               | 93% are Satisfied and Very Satisfied                               |
| What are they most dissatisfied with?                    | 14% are dissatisfied with public transport              | 7% are dissatisfied with attractions (value for money)             | 8% are dissatisfied with public transport                          |
| Do they intend to return?                                | 60% intend to return                                    | 90% intend to return   | 99% intend to return   |

Figure 15: Summary of Key 2009 Results by Origin in Caloundra

|   | Brisbane   | Rest of Queensland   | Overseas   | Interstate   |
|---|--|--|--|--|
| Who do they travel with?                                  | 60% Family group   | 42% Family group   | 33% Adult Couple                                     | 51% Family group   |
| What is their annual household income?                    | 43% \$100,000+   | 22% \$100,000+   | 54% \$100,000+                                       | 26% \$100,000+   |
| What is their age?  | 66% 35 to 54 years   | 48% 35 to 54 years   | 23% 35 to 54 years                                   | 69% 35 to 54 years   |
| What motivates them to visit?                             | 92% to relax and rejuvenate  | 88% to relax and rejuvenate  | 90% to take a family holiday                         | 89% to relax and rejuvenate  |
| What information sources do they use to plan their trip?  | 87% use no information sources or had prior knowledge of Caloundra       | 24% use the internet   | 59% use word of mouth<br>50% use the internet        | 36% use the internet<br>43% had prior knowledge of Caloundra             |
| Do they recall seeing advertising?                        | 33% recall seeing an advertisement                                       | 27% recall seeing an advertisement                                       | 47% recall seeing an advertisement                   | 10% recall seeing an advertisement                                       |
| Why do they visit?  | 90% holiday or leisure purpose   | 71% holiday or leisure purpose   | 59% holiday or leisure purpose                       | 83% holiday or leisure purpose   |
| How many times have they visited in the last three years? | 70% 4+ times   | 64% 4+ times   | 64% First time                                       | 52% 1-3 times  |
| How long do they stay?                                    | 45% 5+ nights  | 29% 5+ nights  | 59% 5+ night   | 76% 5+ nights  |
| What percentage stay with friends and relatives?          | 17% stayed with friends or relatives                                     | 21% stayed with friends or relatives                                     | 54% stayed with friends or relatives                 | 44% stayed with friends or relatives                                     |
| What commercial accommodation do they use?                | 42% rent an apartment or flat  | 40% rent apartment or holiday flat                                       | 50% rent apartment or holiday flat                   | 50% rent apartment or holiday flat                                       |
| How do they book their commercial accommodation?          | 46% book directly (stayed before)  | 25% used the internet to find and book accommodation                     | 60% used the internet to find and book accommodation | 33% used the internet to find accommodation then phoned directly         |
| What activities do they do?                               | 96% go to beach  | 88% go to beach  | 100% go to beach                                     | 100% go to beach   |
| What were they most satisfied with?                       | 94% are satisfied with availability of tourist information for Caloundra | 94% are satisfied with availability of tourist information for Caloundra | 99% attractions (overall)                            | 97% are satisfied with availability of tourist information for Caloundra |
| What is their overall level of satisfaction?              | 95% are Satisfied and Very Satisfied                                     | 90% are Satisfied and Very Satisfied                                     | 82% are Satisfied and Very Satisfied                 | 93% are Satisfied and Very Satisfied                                     |
| What are they most dissatisfied with?                     | 15% are dissatisfied with public transport                               | 17% are dissatisfied with public transport t                             | 20% are dissatisfied with public transport           | 13% are dissatisfied with beaches (overall)                              |
| Do they intend to return?                                 | 94% intend to return   | 96% intend to return   | 59% intend to return                                 | 89% intend to return   |

Figure 16: Summary of Key 2009 Results by Age in Caloundra

|   | < 25 years  | 25-44 years   | 45 and over   |
|---|---|---|---|
| Where do they come from?                                  | 88% Queensland<br>(38% Brisbane)  | 81% Queensland<br>(57% Brisbane)  | 79% Queensland<br>(49% Brisbane)  |
| Who do they travel with?                                  | 38% Adult Couple  | 70% Family group  | 42% Family group  |
| What is their annual household income?                    | 61% under \$20,000  | 38% \$100,000+  | 33% under \$59,000  |
| What motivates them to visit?                             | 75% to socialise with friends and meet new people   | 92% to relax and rejuvenate   | 91% to relax and rejuvenate   |
| What information sources do they use to plan their trip?  | 75% use no information sources or had prior knowledge of Caloundra<br>13% used the internet | 72% use no information sources or had prior knowledge of Caloundra<br>30% used the internet | 82% use no information sources or had prior knowledge of Caloundra<br>27% used the internet |
| Do they recall seeing advertising?                        | 50% recall seeing an advertisement  | 29% recall seeing an advertisement  | 36% recall seeing an advertisement  |
| Why do they visit?  | 88% holiday or leisure purpose  | 79% holiday or leisure purpose  | 81% holiday or leisure purpose  |
| How many times have they visited in the last three years? | 88% 4+ times  | 56% 4+ times  | 56% 4+ times  |
| How long do they stay?                                    | Day visitor 44%   | 5+ nights 56%   | 5+ nights 45%   |
| What percentage stay with friends or relatives?           | 56% stayed with friends or relatives  | 24% stayed with friends or relatives  | 21% stayed with friends or relatives  |
| What commercial accommodation do they use?                | 25% stayed in backpacker or youth hostel  | 45% stayed in a Rented apartment or holiday flat  | 45% stayed in a Rented apartment or holiday flat  |
| How do they book their commercial accommodation?          | 50% did not book ahead  | 41% Direct Booking<br>(Stayed before)   | 36% Direct Booking<br>(Stayed before)   |
| What activities do they do?                               | 100% Go to the beach  | 94% Go to the beach   | 94% Go to the beach   |
| What are they most satisfied with?                        | 100% are satisfied with signage   | 93% Availability of tourist information for Caloundra                                       | 95% Availability of tourist information for Caloundra)                                      |
| What is their overall level of satisfaction?              | 81% are Satisfied and Very Satisfied  | 92% are Satisfied and Very Satisfied  | 93% are Satisfied and Very Satisfied  |
| What are they most dissatisfied with?                     | <i>33% are dissatisfied with public transport</i>   | <i>19% are dissatisfied with public transport</i>   | <i>20% are dissatisfied with public transport</i>   |
| Do they intend to return?                                 | 88% intend to return  | 92% intend to return  | 90% intend to return  |

Figure 17: Summary of Key 2009 Results by Length of Stay in Caloundra

|   | Day Tripper  | Four nights or less                                  | Five or more nights  |
|---|--|--|--|
| Where do they come from?                                  | Queensland 87%<br>Brisbane 48%                                     | Queensland 91%<br>Brisbane 57%                       | Queensland 70%<br>Brisbane 51%                                 |
| Who do they travel with?                                  | Family group 43%   | Family group 43%                                     | Family group 61%   |
| What is their annual household income?                    | 31% have an annual family gross income of >\$100,000               | 36% have an annual family gross income of >\$100,000 | 39% have an annual family gross income of >\$100,000           |
| What is their age?  | 60% are 35 to 54 years   | 50% are 25 to 34 years                               | 65% are 25 to 34 years   |
| What motivates them to visit?                             | 85% to relax & rejuvenate  | 93% to relax & rejuvenate                            | 92% to relax & rejuvenate                                      |
| What information sources do they use to plan their trip?  | 87% use no information sources or had prior knowledge of Caloundra | 30% use the internet                                 | 39% use the internet   |
| Do they recall seeing advertising?                        | 33% recall seeing an advertisement                                 | 30% recall seeing an advertisement                   | 36% recall seeing an advertisement                             |
| Why do they visit?  | 81% holiday or leisure purpose                                     | 71% holiday or leisure purpose                       | 86% holiday or leisure purpose                                 |
| How many times have they visited in the last three years? | 71% have visited 4+ times  | 56% have visited 4+ times                            | 64% have visited 4+ times                                      |
| What percentage stay with friends or relatives?           | 33% stayed with friends or relatives                               | 19% stayed with friends or relatives                 | 24% stayed with friends or relatives                           |
| What accommodation do they use?                           | n.a.   | 32% stay in a hotel or resort                        | 47% rent apartment of holiday flat                             |
| How do they book their commercial accommodation?          | n.a.   | 23% used the internet to find and book accommodation | 47% Direct Booking (Stayed before)                             |
| What activities do they do?                               | 90% go to beach  | 93% go to beach                                      | 100% go to beach   |
| What are they most satisfied with?                        | 100% are satisfied with signage                                    | 92% are satisfied with shopping (overall)            | 97% are satisfied with the tourist information about Caloundra |
| What is their overall level of satisfaction?              | 87% are Satisfied and Very Satisfied                               | 88% are Satisfied and Very Satisfied                 | 97% are Satisfied and Very Satisfied                           |
| What are they most dissatisfied with?                     | 23% are dissatisfied with beaches (overall)                        | 13% are dissatisfied with public transport           | 9% are dissatisfied with public transport                      |
| Do they intend to return?                                 | 86% intend to return   | 87% intend to return                                 | 97% intend to return   |



# Caloundra Visitor Profile



## What do Caloundra's visitors look like?

### **Their travel party . . .**

Caloundra attracts a large number of families (parents and children), particularly amongst those who stay for longer periods and who have visited many times before. This type of travel party is particularly dominant in the 25 - 44 year age group. When compared with repeat visitors, first time visitors are more likely to be adult couples. Visitors under 25 years of age are also more likely to be travelling alone or as an adult couple. Caloundra attracts only a small number of visitors travelling as independent adults in a large group. This pattern is very similar to that found in previous Waves.

### **Their household income . . .**

Caloundra is attracting the full range of income earners. The proportion of visitors in the highest income bracket (\$120,000+) has continued to increase as it has done over the last four Waves. Those in the higher income brackets tend to be intrastate visitors aged 45+ years, and these are more highly represented in the group staying 5+ nights and travelling with children. The lower income groups are more likely to be travelling without children and on a day trip or staying only 1-4 nights. Day trippers are generally from the middle income groups (\$40,000 - \$99,999).

### **Their origin . . . .**

Caloundra is attracting a large proportion of its visitors from Brisbane and Southeast Queensland which is very similar to the situation in previous waves. Brisbane is the main source of both day trippers and overnight visitors, but a very large proportion of day trippers come from within the Sunshine Coast itself. Overseas visitor numbers are less than in previous Waves but still represent an important market, especially amongst those staying overnight. They tend to represent the third largest group amongst those staying 5+ nights. Generally they tend to be older and mainly on their first visit. However, approximately one third are on a repeat visit. Interstate visitors are more likely to be on a repeat visit, especially amongst those from Victoria. Sunshine Coast residents tend to be repeat visitors, generally have lower incomes and are travelling alone.

# Travel Party

## Key Findings:

- The 'Family Group (Parents and Children)' is the largest single group type, accounting for over half (51%) of visitors.
- The second most popular group type is 'Adult Couple'.
- When the results are analysed by visitation (number of times respondents had visited previously), the 'Family Group (Parents and Children)' and 'Adult Couples' are the two most prevalent travel parties in each group.
- The proportion of overnight visitors who are 'Travelling Alone' or travelling as an 'Adult Couple' decreases the longer the length of stay.
- The proportion of people travelling alone is lowest in the 24-45 year age group.
- The Family Group (parents and children) is the major travel party in the 25-44 year age group (70%).
- The results outlined in each case above are consistent with the results found in previous Waves although the proportion has varied slightly. This suggests that Caloundra has been attracting a similar market for several years.

## Data Collected:

Respondents were asked to describe their immediate travel party. These were grouped into 7 different types, including 'Other'. None of the responses were included in the 'Other' category.

Figure 18: Travel Party by Wave

| Travel Party                                    | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|------|------|------|------|------|
| Travelling alone                                | 7%   | 10%  | 11%  | 9%   | 8%   |
| Adult couple                                    | 23%  | 22%  | 32%  | 22%  | 21%  |
| Family Group (parents and children)             | 55%  | 51%  | 47%  | 59%  | 51%  |
| Friends and relatives with children             | 7%   | 8%   | 2%   | 5%   | 12%  |
| Friends and relatives (without children)        | 5%   | 9%   | 5%   | 5%   | 5%   |
| Independent adults in large group (no children) | 0%   | 0%   | 2%   | 0%   | 3%   |
| Other   | 1%   | 1%   | 0%   | 0%   | 0%   |

Figure 19: Travel Party by Visitation

| Travel Party                                    | First Visit | 1-3 Times Before | 4+ Times Before |
|---|-------------|------------------|-----------------|
| Travelling alone                                | 17%         | 6%               | 6%              |
| Adult couple                                    | 35%         | 16%              | 21%             |
| Family Group (parents and children)             | 35%         | 60%              | 49%             |
| Friends and relatives with children             | 7%          | 9%               | 15%             |
| Friends and relatives (without children)        | 7%          | 5%               | 5%              |
| Independent adults in large group (no children) | 0%          | 4%               | 4%              |
| Total   | 100%        | 100%             | 100%            |

Figure 20: Travel Party by Length of Stay

| Travel Party                                    | Day Trip | 1-4 Nights | 5+ Nights |
|---|----------|------------|-----------|
| Travelling alone                                | 9%       | 11%        | 4%        |
| Adult couple                                    | 18%      | 32%        | 17%       |
| Family Group (parents and children)             | 43%      | 43%        | 61%       |
| Friends and relatives with children             | 16%      | 7%         | 12%       |
| Friends and relatives (without children)        | 8%       | 4%         | 3%        |
| Independent adults in large group (no children) | 6%       | 4%         | 2%        |
| Total   | 100%     | 100%       | 100%      |

Figure 21: Travel Party by Age

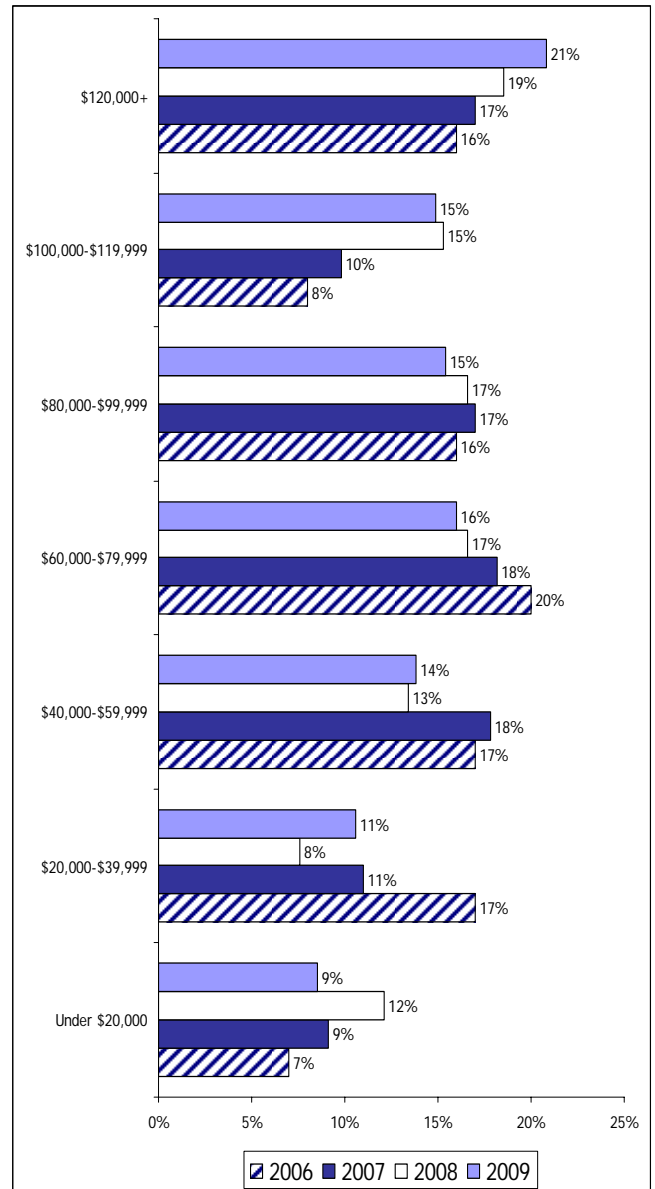
| Party Type                                      | 18-24 years | 25-44 years | 45+ years |
|---|-------------|-------------|-----------|
| Travelling alone                                | 12.5%       | 5.6%        | 8.9%      |
| Adult couple                                    | 37.5%       | 7.5%        | 28.9%     |
| Family Group (parents and children)             | 6.3%        | 70.1%       | 42.2%     |
| Friends and relatives with children             | 6.3%        | 11.2%       | 13.3%     |
| Friends and relatives (without children)        | 12.5%       | 2.8%        | 5.9%      |
| Independent adults in large group (no children) | 25.0%       | 2.8%        | 0.7%      |
| Total   | 100%        | 100%        | 100%      |

# Annual Household Gross Income

## Key Findings:

- Almost half of the visitors (46%) have gross household incomes of \$60,000-\$119,999.
- The proportion of respondents in the highest income groups (\$120,000+) has increased over each of the Waves.
- The proportion of visitors with gross household incomes of less than \$40,000 has remained the same (20%) in the last three Waves.
- Those staying 5+ nights are more likely to come from the \$60,000 - \$119,000+ groups.
- A large proportion of day visitors (44.9%) are in the \$40,000-\$99,999 group.
- The percentage of those in the under \$40,000 income bracket is higher for those travelling without children than amongst those travelling with children. This may reflect the fact that the former cohort is generally older and younger than those travelling with children.

Figure 23: Annual Household Income by Wave



## Data Collected:

Respondents were asked to identify what their approximate annual household income before tax. This was recorded in (9) categories. In the current Wave extra categories above \$120,000 were used. These were collapsed for comparisons with other Waves.

Figure 22: Annual Household Income

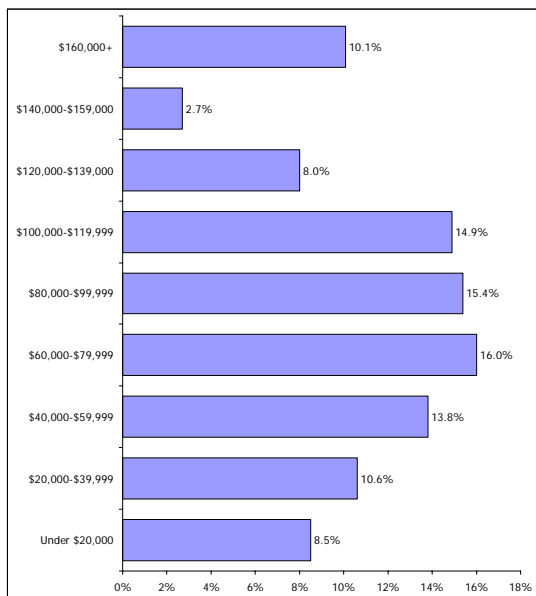


Figure 24: Annual Household Income by Age

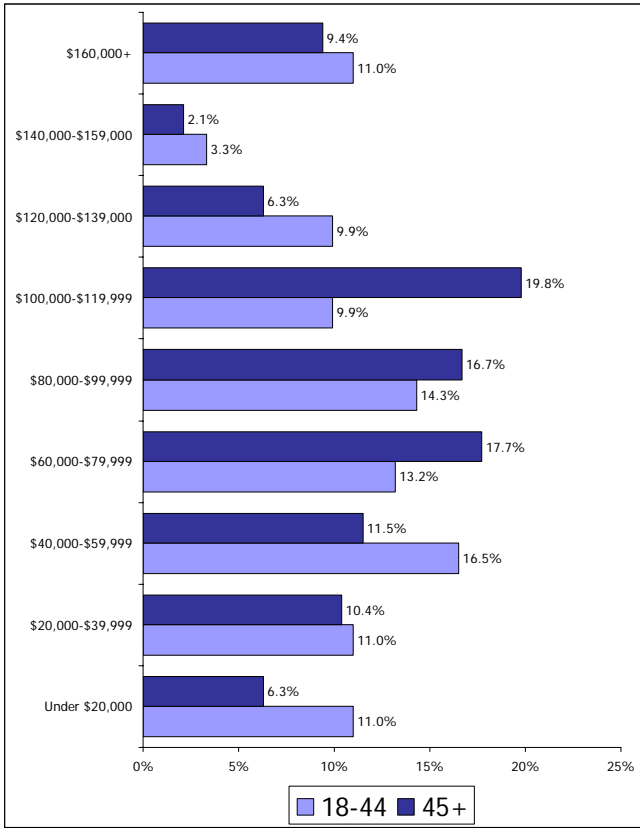


Figure 26: Annual Household Income by Length of Stay

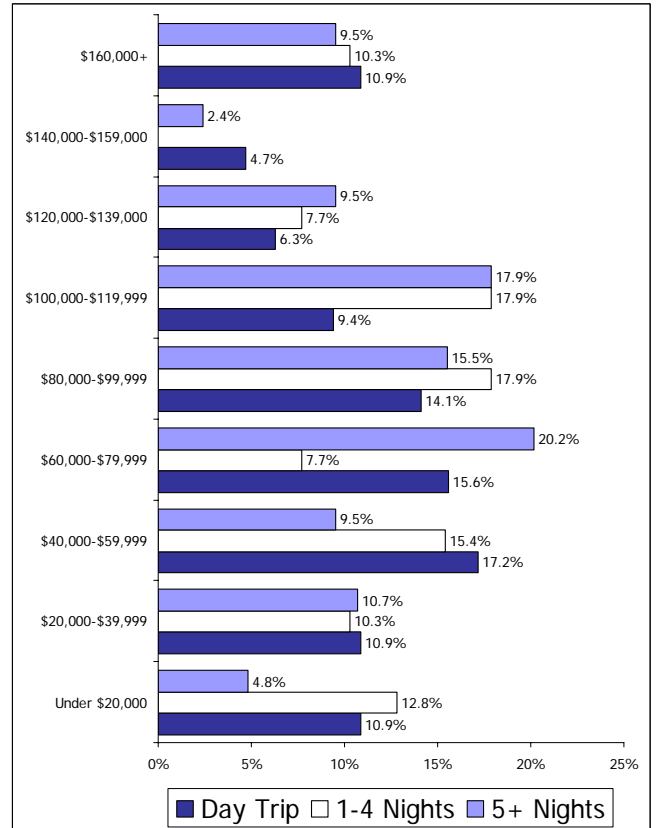


Figure 25: Annual Household Income by Travel Party

| Gross Annual Income | Travelling With Children | Travelling Without Children |
|---------------------|--------------------------|-----------------------------|
| Under \$20,000      | 6.4%                     | 13.1%                       |
| \$20,000-\$39,999   | 8.8%                     | 14.8%                       |
| \$40,000-\$59,999   | 12.8%                    | 16.4%                       |
| \$60,000-\$79,999   | 16.8%                    | 13.1%                       |
| \$80,000-\$99,999   | 17.6%                    | 11.5%                       |
| \$100,000-\$119,999 | 13.6%                    | 18.0%                       |
| \$120,000-\$139,000 | 10%                      | 5%                          |
| \$140,000-\$159,000 | 3.2%                     | 1.6%                        |
| \$160,000+          | 11.2%                    | 6.6%                        |
| Total               | 100.0%                   | 100.0%                      |

# Age and Gender of Respondents

## Key Findings:

- The majority of visitors are female. This is consistent with previous Waves.
- Women are over represented in the older age categories.
- The age of visitors tends to be a little older than in previous Waves.
- Almost two thirds (61%) of visitors are in the 35-54 age category.
- The age and gender distribution is similar to that found in previous Waves, except for the larger numbers in the 45-54 year age group.

## Data Collected:

Respondents were asked their gender and age. The latter were fitted into predetermined categories.

Figure 27: Gender of Respondents

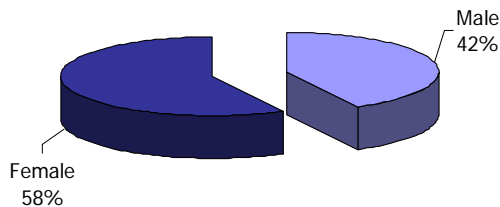


Figure 29: Age of Respondents by Wave

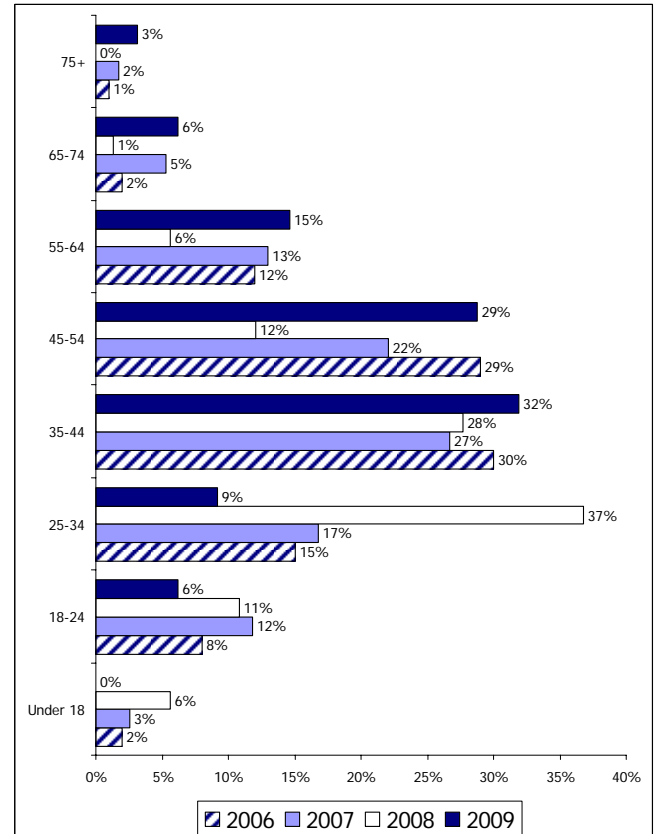


Figure 28: Gender by Age

| Gender | 18-24 years | 25-44 years | 45+ years |
|--------|-------------|-------------|-----------|
| Male   | 68.8%       | 39.4%       | 41.6%     |
| Female | 31.3%       | 60.6%       | 58.4%     |
| Total  | 100.0%      | 100.0%      | 100.0%    |

# Origin of Respondents

## Key Findings:

- The majority of respondents (52%) come from Brisbane, which is similar to previous years.
- Almost half of day visitors (48%) come from Brisbane, with the next largest source being from within the Sunshine Coast itself (35%).
- Although the proportion of total visitors that come from overseas (85) is less than last year, they still represent the third highest group.
- Just over one tenth (11%) of total visitors come from interstate with the main sources being New South Wales (7%) and Victoria (4%).
- The interstate market is far more important amongst those staying overnight with one fifth (20%) of visitors who stay 5+ days coming from interstate.
- In this Wave there are no interstate visitors in the 18-24 year age group.
- Over two thirds (68%) of overseas visitors are from 45+ year age group, which is similar to the 2008 Wave.
- A lower proportion of visitors from Sunshine Coast visitors are found in the \$100,000+ income bracket than is the case with visitors from other source areas.
- Overseas visitors tend to be polarised in terms of their income. They are either in the lowest or highest income categories.
- Almost two thirds of visitors (61%) travelling as a family group come from Brisbane which is the same as in the 2009 Wave.
- As might be expected, new visitors to Caloundra mainly come from interstate or overseas.

## Data Collected:

Respondents were asked to identify where they normally resided and, if that was in Australia, what the postcode was for that location. Origin categories are the same as in previous Waves to enable direct comparisons.

Figure 30: Origin of Visitors by Wave

This chart shows the proportion of visitors in each Wave that come from different origin categories. For example, 51.5% of respondents in the January 2009 Wave come from Brisbane.

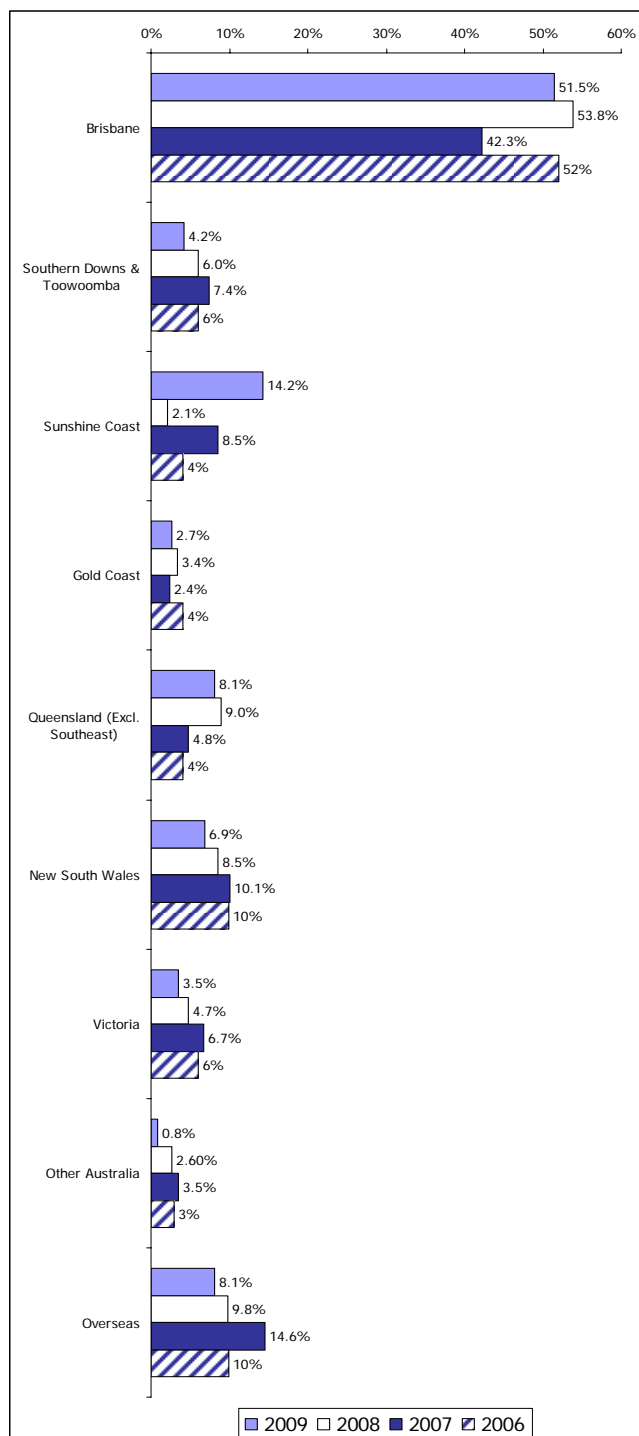


Figure 31: Origin of Visitors by Length of Stay

This chart shows the origin of visitors in each visitation category. For example, 48.3% of day visitors come from Brisbane.

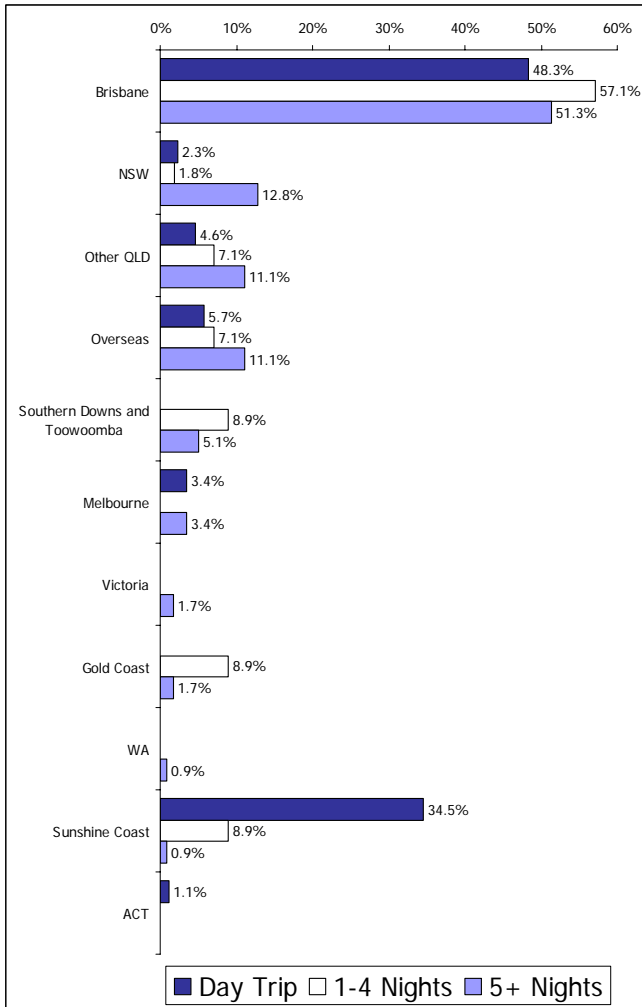


Figure 32: Origin by Annual Gross Household Income

This chart indicates the origin of visitors in different income brackets. For example, 64.2% of visitors with a gross annual household income of \$100,000+ come from Brisbane.

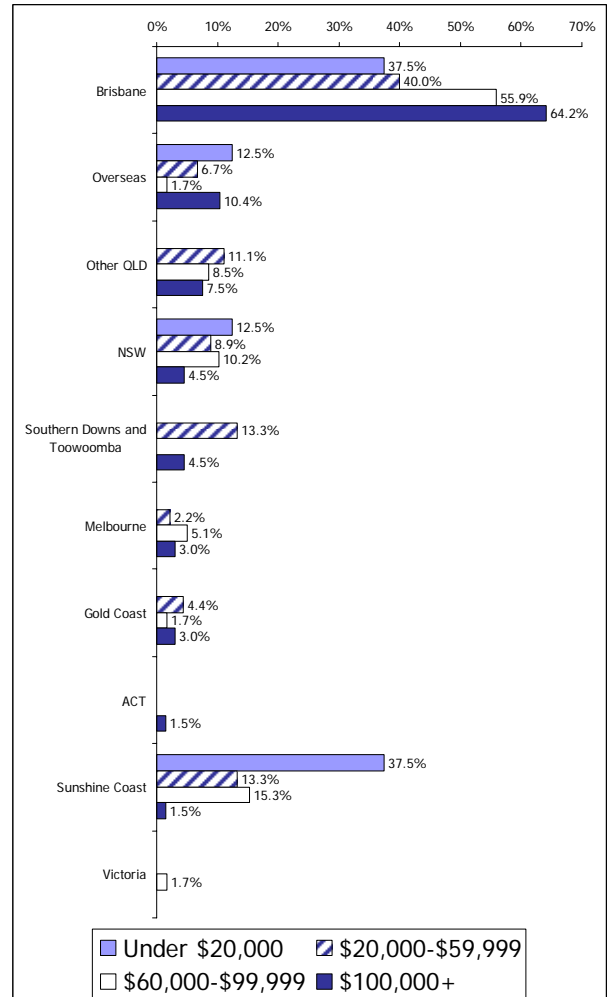


Figure 33a: Origin of Visitors by Age

This chart shows the breakdown of age for respondents from each origin category. For example, 50.4% of visitors from Brisbane are aged 45+ years. Note that the age categories have been chosen to permit comparisons with previous years.

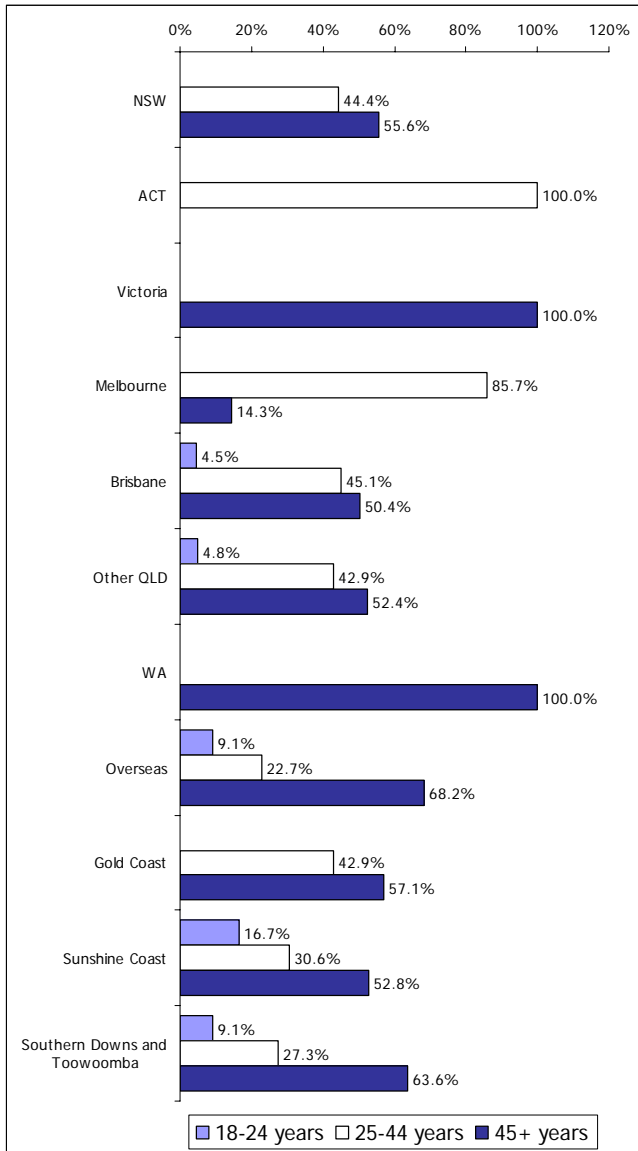


Figure 33b: Age of Visitors by Origin

This chart shows the breakdown of each origin category by age. For example, 38% of visitors aged 18-44 years are from Brisbane.

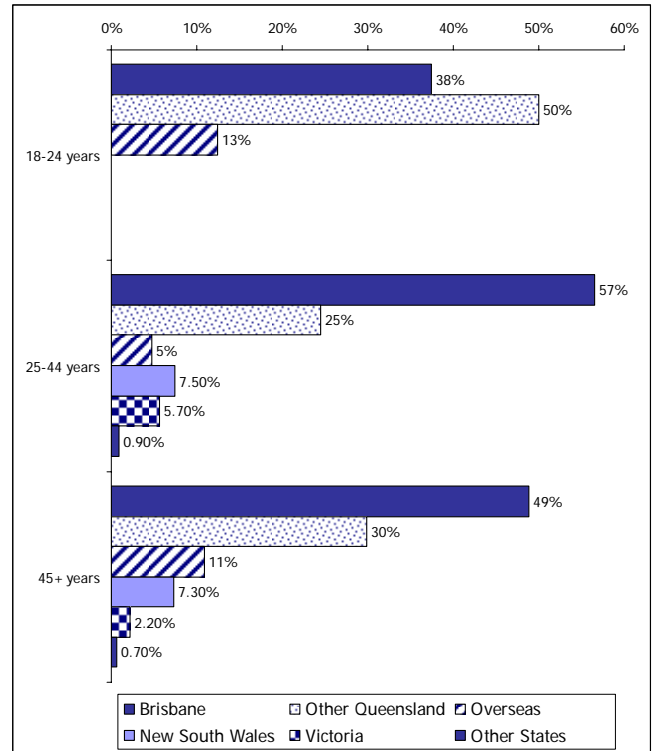


Figure 34: Origin by Travel Party

This chart indicates the type of travel party that comes from each origin category. For example, 60.9% of those travelling as a family group come from Brisbane. Note that only the top three Travel Part types are included in the graph as there were insufficient visitors in many of the other categories.

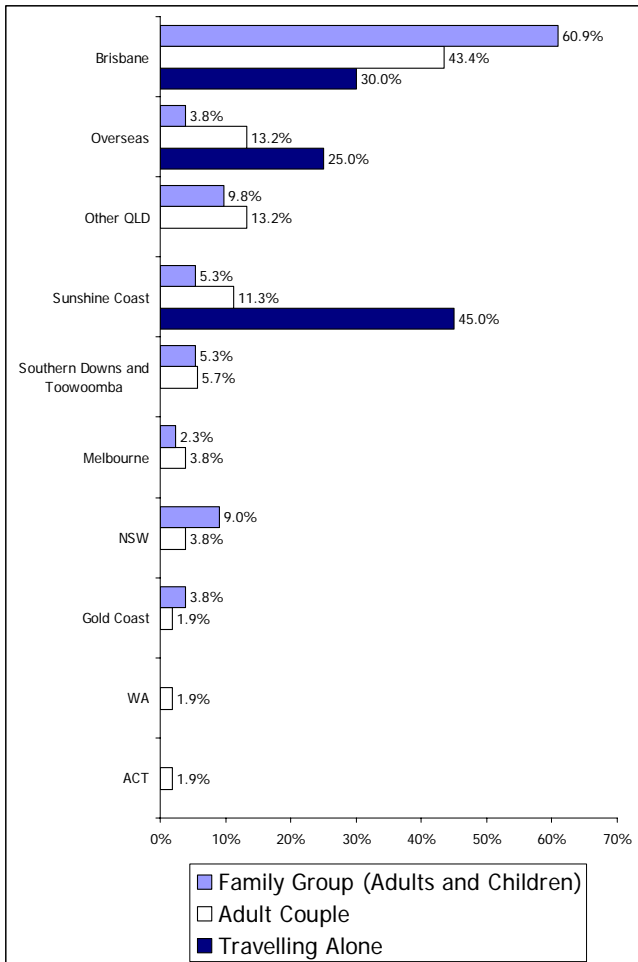


Figure 35: Origin by Visitation

This chart indicates the proportion of respondents from each origin category that have either visited before or were on their first visit. For example, only 2.2% of respondents from Brisbane are on their first visit.

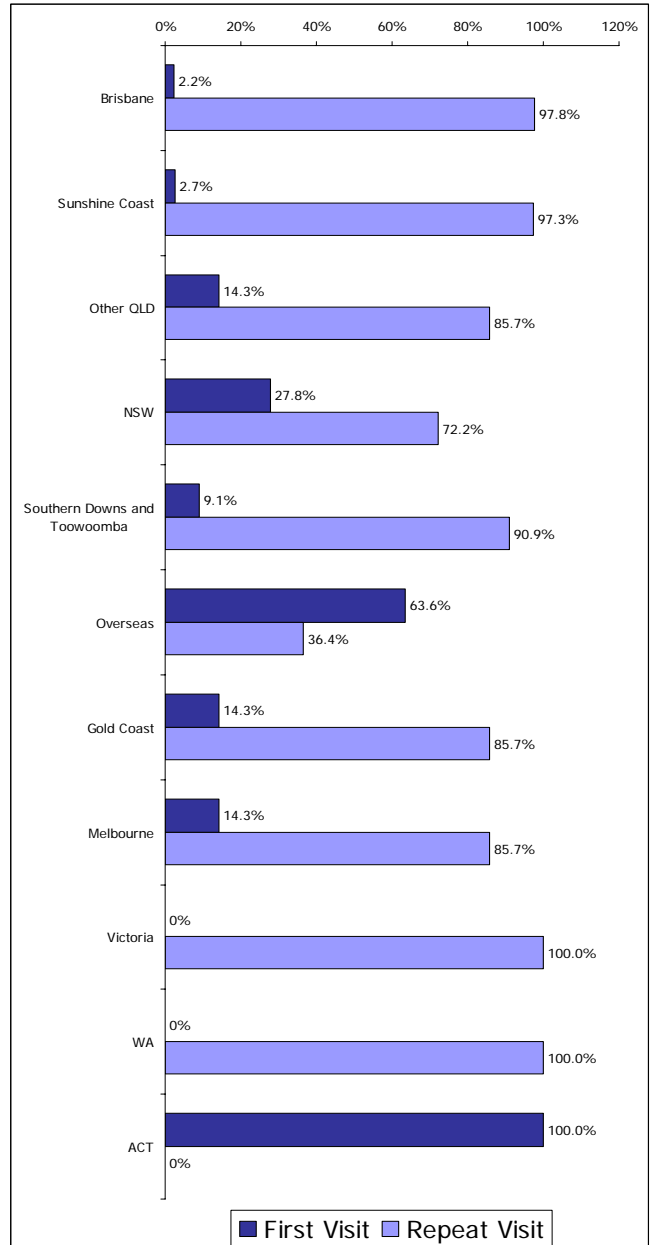


Figure 36: Visitation by Origin

This chart looks at the same data in reverse. It indicates the proportion of respondents from each visit category that come from each origin area. For example, only 10% of respondents on their first visit come from Brisbane.

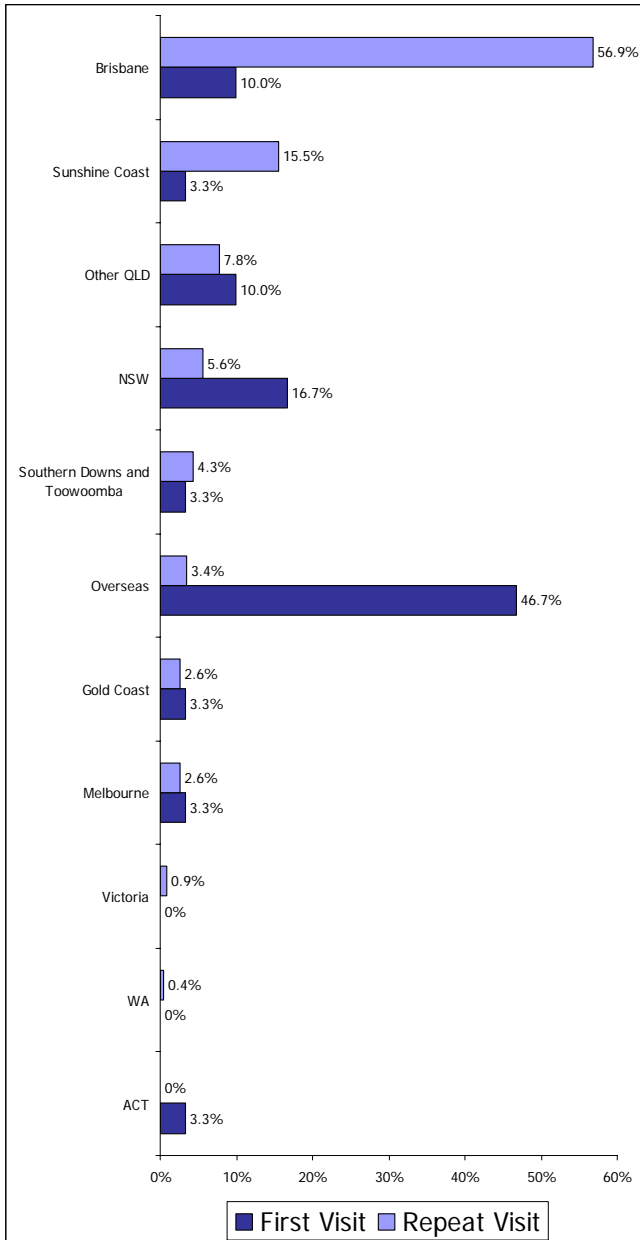


Figure 37: Origin of Overseas Visitors

| Area           | Number | Percent |
|----------------|--------|---------|
| Europe         | 5      | 22.7%   |
| United Kingdom | 7      | 31.8%   |
| Africa         | 3      | 13.6%   |
| USA            | 1      | 4.5%    |
| Canada         | 3      | 13.6%   |
| New Zealand    | 3      | 13.6%   |



*Find your space*

# Motivation and Information Sources



## **What affects people's decision to travel to Caloundra?**

### **Their motives . . . .**

Most people are visiting Caloundra for leisure or holiday purposes, although visiting friends and relatives remains a significant secondary purpose. For the large majority seeking a holiday in Caloundra, the importance of relaxation and rejuvenation is paramount, particularly in the context of a family holiday. Indulgence and luxury is not as important as in other destinations, nor is experiencing culture and heritage. Rather, many are seeking a family-oriented holiday particularly those staying over-night, and especially amongst those staying longer. Spending time with one's partner is also important amongst those staying for 1-4 nights which is an indication that the short stay market exists without an emphasis on luxury. Day trippers have similar motives, except that they also emphasise a desire to socialise and meet new friends.

### **The sources of information that they use . . . .**

Advertising appears to be recognised by an increased number of visitors. This is particularly so amongst those from the Southern Darling Downs and other parts of Queensland. Interestingly, advertising is also recalled well by overseas visitors, possibly because they are on the lookout for it. Many visitors to Caloundra rely on their prior knowledge of the area when planning their trip, especially amongst those that have visited four or more times and come from Brisbane or the rest of Queensland. The internet is being used by an even larger proportion of visitors than in previous Waves. Travel brochures, travel agents and travel guides are important for overseas visitors, as are Visitor Information Centres. The vast majority of day visitors rely on either prior knowledge or no information. By contrast, those staying five or more nights place a reasonably high reliance of the internet and word of mouth recommendations.

### **How they book their accommodation . . . .**

A significant number of visitors to Caloundra do not book their accommodation before they arrive, even amongst those on repeat visits. As in previous Waves, this is particularly so amongst those travelling alone or without children, staying four nights or less and generally in the younger age groups. Those who stay longer tend to book ahead more, especially via direct bookings where they have stayed before. The use of the internet to either find or book accommodation is slightly less than in the last Wave, but it is still a significant method, particularly amongst interstate and overseas visitors. Travel agents are still used by a small group of visitors, but unlike previous Waves they are not used by interstate and overseas visitors who appear to rely more on the internet.

# Motivation for the Trip

## Key Findings:

- The prime motive for visiting Caloundra is to 'relax and rejuvenate'.
- 'To indulge in a luxurious escape' and 'Experiencing local culture and heritage' are the least important motivators.
- The top three motives are generally the same for all overnight visitors, irrespective of their length of stay.
- To socialise with friends and meet new people is much more important to day trippers.
- The motive 'to take a family holiday' is less important to visitors from 'Other Queensland', possibly reflecting a lower percentage travelling in a family group.
- 'To be active and adventurous' is a much more important motive amongst visitors from interstate and overseas than amongst Queenslanders.
- The three important features of the destination that attract visitors are its perceived relaxed and lay-back atmosphere the presence of nice beaches and Caloundra's proximity to where people live.
- The majority of visitors consider other places as alternative destinations for their trip.

## Data Collected:

Visitors were asked to indicate what motivated them to visit Caloundra. The question asked the respondents how strongly they agreed with statements on ten factors that could have motivated them. Responses were measured on a five point scale where one equalled 'Strongly Disagree' and five equalled 'Strongly Agree'.

Visitors were also asked to identify the main purpose of their trip to Caloundra from a list of four alternatives.

Figure 38: Motivations

This chart shows the respondents who indicated that they either 'Agree' or 'Strongly Agree' with the statements presented to them.

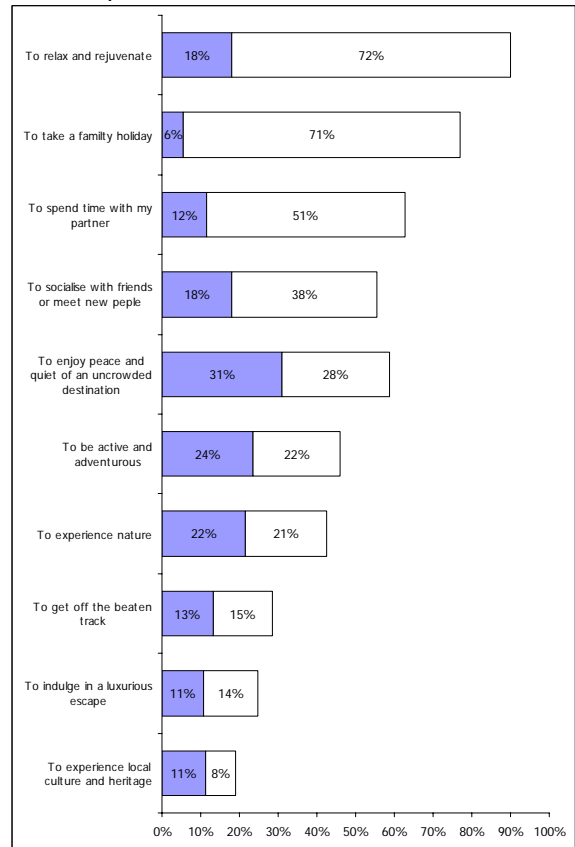


Figure 38: Main Purpose of Trip by Wave

| Main Purpose of Visit          | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|--------------------------------|------|------|------|------|------|------|
| Holiday/Leisure                | 78%  | 79%  | 83%  | 78%  | 90%  | 81%  |
| Honeymoon                      | 0%   | 0%   | 0%   | 0%   | 1%   | 0%   |
| Special Public Event           | 0%   | 0%   | 0%   | 0%   | 0%   | 1%   |
| Visiting Friends and Relatives | 16%  | 16%  | 12%  | 19%  | 8%   | 18%  |
| Business/Employment/Training   | 3%   | 0%   | 3%   | 2%   | 0%   | 0%   |
| Other                          | 3%   | 5%   | 3%   | 1%   | 1%   | 0%   |

Figure 40: Distribution of Motivation Measures

This table shows the mean score recorded for each of the 10 motivation statements. The higher the mean score, the greater the importance of that particular motive. Because scores are scattered around this mean the standard deviation of each is also presented. The higher the standard deviation, the greater the range in the value of responses to that particular motive statement.

| Motive Scale   | N   | Mean | Std. Deviation |
|--|-----|------|----------------|
| To relax and rejuvenate                              | 251 | 4.6  | 0.86           |
| To take a family holiday                             | 252 | 4.1  | 1.54           |
| To spend time with my partner                        | 250 | 3.6  | 1.70           |
| To enjoy peace and quiet of an uncrowded destination | 248 | 3.5  | 1.36           |
| To socialise with friends or meet new people         | 251 | 3.4  | 1.55           |
| To be active and adventurous                         | 246 | 3.2  | 1.35           |
| To experience nature                                 | 246 | 3.0  | 1.49           |
| To get off the beaten track                          | 250 | 2.4  | 1.51           |
| To indulge in a luxurious escape                     | 250 | 2.4  | 1.47           |
| To experience local culture and heritage             | 247 | 2.3  | 1.32           |

Figure 42: Motivations by Day vs Overnight Visit

| Motive Scale   | Day Visit | Overnight Visit |
|--|-----------|-----------------|
| To take a family holiday                             | 55%       | 88%             |
| To spend time with my partner                        | 50%       | 69%             |
| To relax and rejuvenate                              | 85%       | 92%             |
| To indulge in a luxurious escape                     | 14%       | 30%             |
| To experience nature                                 | 43%       | 42%             |
| To experience local culture and heritage             | 15%       | 22%             |
| To be active and adventurous                         | 41%       | 48%             |
| To enjoy peace and quiet of an uncrowded destination | 51%       | 62%             |
| To socialise with friends or meet new people         | 60%       | 54%             |
| To get off the beaten track                          | 27%       | 29%             |

Figure 41: Motivations by Length of Stay

This table combines the 'Agree' and 'Strongly Agree' responses for three categories of Visitation. Approximately 85% of Day Visitors agree or strongly agree with the statement that they visited Caloundra 'to relax and rejuvenate'. This contrasts with 92% of those who stayed 5 nights or more.

| Motive Scale   | Day Trip | 1-4 Nights | 5+ Nights |
|--|----------|------------|-----------|
| To relax and rejuvenate                              | 85%      | 93%        | 92%       |
| To take a family holiday                             | 55%      | 74%        | 95%       |
| To spend time with my partner                        | 50%      | 73%        | 68%       |
| To enjoy peace and quiet of an uncrowded destination | 51%      | 63%        | 62%       |
| To socialise with friends or meet new people         | 60%      | 51%        | 55%       |
| To experience nature                                 | 43%      | 46%        | 41%       |
| To be active and adventurous                         | 41%      | 33%        | 55%       |
| To get off the beaten track                          | 27%      | 23%        | 32%       |
| To indulge in a luxurious escape                     | 14%      | 21%        | 34%       |
| To experience local culture and heritage             | 15%      | 19%        | 23%       |

Figure 43: Motivations by Origin

The data in this table shows the percentage in each origin group that 'Agree' or 'Strongly Agree' with the statement. The top motive has been shaded for each origin. While they are not substantially different, some motives are distinctly different for visitors from different origins. The best example is the different motives driving those from Brisbane and from other states.

| Motive Scale   | Brisbane | Other Queensland | Overseas | New South Wales | Victoria | Other States |
|--|----------|------------------|----------|-----------------|----------|--------------|
| To take a family holiday                             | 87.3%    | 52.9%            | 90.0%    | 83.3%           | 88.9%    | 0.0%         |
| To spend time with my partner                        | 69.5%    | 54.3%            | 55.0%    | 66.7%           | 33.3%    | 100.0%       |
| To relax and rejuvenate                              | 92.4%    | 87.1%            | 85.0%    | 94.4%           | 77.8%    | 100.0%       |
| To indulge in a luxurious escape                     | 23.5%    | 17.4%            | 35.0%    | 50.0%           | 33.3%    | 0.0%         |
| To experience nature                                 | 43.9%    | 32.8%            | 72.2%    | 38.9%           | 55.5%    | 0.0%         |
| To experience local culture and heritage             | 14.1%    | 15.7%            | 70.0%    | 11.2%           | 22.2%    | 0.0%         |
| To be active and adventurous                         | 46.9%    | 28.3%            | 65.0%    | 72.2%           | 66.6%    | 100.0%       |
| To enjoy peace and quiet of an uncrowded destination | 53.4%    | 55.9%            | 90.0%    | 72.2%           | 66.7%    | 0.0%         |
| To socialise with friends or meet new people         | 50.0%    | 62.8%            | 75.0%    | 61.1%           | 22.2%    | 0.0%         |
| To get off the beaten track                          | 29.8%    | 17.1%            | 35.0%    | 38.9%           | 66.7%    | 0.0%         |

Figure 44: Detailed Analysis of Reasons for choosing Caloundra

To get a better understanding of why people chose Caloundra as the destination for their holiday or visit they were each asked an open-ended question: "If friends asked you why you chose Caloundra for this trip (rather than anywhere else) what would you say to them?"

While this analysis is not quantitative in nature, the relative number of responses in each category can be used to indicate what are the important motives driving visitors. The three important features of the destination are its perceived relaxed and lay-back atmosphere the presence of nice beaches and Caloundra's proximity to where people live. Also important is the family-oriented nature of the destination, including it being perceived as being child or family friendly. Interestingly, the presence of specific attractions or facilities was not given as a major motivation for visitors.

The detailed verbatim results of this are listed in Appendix A. A categorisation of those responses is also provided to demonstrate what patterns occur. The following categories identified are shown in the table on the following page.

| Category of Answer             | Description  |
|--------------------------------|--|
| Beach Related (41)             | Visitors nominated the beaches, including their quality, the surf and the warmth of the water.   |
| Familiarity (18)               | This is common amongst repeat visitors who nominated that they feel comfortable and know the area well.  |
| Family/Friend Attraction (31)  | This means that visitors chose to visit Maroochy because they have friends or relatives living here.   |
| Family/Child Friendly (18)     | This includes comments about the attractiveness of the area for children or that they feel it is a very family oriented place.   |
| Accommodation Related(7)       | This means that the choice was based on the accommodation (either its availability or price) and not on any characteristic of the area itself.   |
| Proximity/Convenience (43)     | This includes comments about the proximity of the destination to where they live and the fact that getting here is very convenient.  |
| Quiet/Relaxed (23)             | This was referred to by many visitors and covers a range of descriptors that reflect a feeling of relaxation or peacefulness that they get when they are in the destination.   |
| Not Over Developed (4)         | This includes a number of different comments about the destination being not busy or commercialised. There were only a few comments of this kind.  |
| General Positive Comments (18) | These are general comments about the destination that reflect a positive attitude towards it. They are not place-specific but give an idea of how people perceive the destination.   |
| Activity Related(6)            | These comments suggest that the destination is seen as having lots of things to do. They generally reflect 'activities' rather than 'entertainment' and are mainly related to beach activities.  |
| Facility Related (17)          | These comments reflect a feeling that the destination has a lot of specific facilities such as parks or walkways. Very few referred to specific attractions in the area. While the specific comments are very diverse, those who offered these comments clearly value the availability of these things in the destination. |
| Weather Related (4)            | These are generally positive comments about the weather/climate in general, rather than about the specifics of the day they were interviewed. The comments also include reference to the temperature of the water.   |
| Comparative (14)               | These comments show that visitors compare the destination with others. The most common comparison is with the Gold Coast or Mooloolaba.  |
| Cost Related (3)               | These are generally comments about the fact that the destination is affordable.  |
| Other (7)                      | This diverse group includes the fact that they own property in Caloundra.  |

Figure 45: Alternative Destinations Considered When Making Decision to Visit Caloundra

Visitors were also asked what other destinations they considered when making their decision about whether to travel to Caloundra. As can be seen in the following table, almost three quarters (70.4%) did not consider other destinations. However, almost one in 5 (18.1%) did consider at least one other destination.

| Number of Alternatives Considered | Number of visitors | Percentage |
|-----------------------------------|--------------------|------------|
| 0                                 | 183                | 70.4%      |
| 1                                 | 47                 | 18.1%      |
| 2                                 | 18                 | 6.9%       |
| 3                                 | 12                 | 4.6%       |
| Total                             | 260                | 100.0%     |

| Area Considered      | Comments   |
|----------------------|--|
| Sunshine Coast       | These are mainly areas around the Sunshine Coast and are clearly the most commonly considered alternatives |
| Southeast Queensland | While there are different areas mentioned, the major alternative destination considered is the Gold Coast  |
| Fraser Coast         | This includes Fraser Island and Hervey Bay   |
| Other Queensland     | This is mainly northern destinations   |
| Interstate           | Several destinations in other states were mentioned  |
| Northern NSW         | This includes a small number of areas on the Coast, the most common of which is Byron Bay.                 |
| Overseas             | A small number of Pacific destinations are amongst alternatives considered                                 |

# Information Sources

## Key Findings:

- Prior knowledge of the region remains a very important source of information that visitors use in planning or organising their trips.
- Although the percentage value of those with prior knowledge of the region is much higher than in the previous Wave (70% compared with 61%), it is consistently the most important source of information in all Waves.
- Prior knowledge of the region is a more important information source amongst those who have visited 4 or more times.
- As a source of information amongst visitors, the internet has been used by an even larger proportion of visitors than in previous Waves. It is particularly important for those who stay overnight (both are over 30%). This compares with 8% for day visitors.
- Just over one third (34%) of visitors recall seeing advertisements about Caloundra before leaving home. This is a significant jump on previous Waves.
- Advertising recall is greatest amongst those from the Southern Darling Downs and Toowoomba.

## Data Collected:

Visitors were presented a list of sources that could be used to plan or organise a trip or holiday. For each source type, they were asked to indicate whether or not they had used it to plan their current trip to Caloundra. Respondents were therefore able to give more than one response (Multiple Responses). Multiple responses are included.

Visitors were also asked whether they could recall seeing any advertisements about Caloundra before leaving home. Only one response was permitted.

Figure 46: Information Sources Used

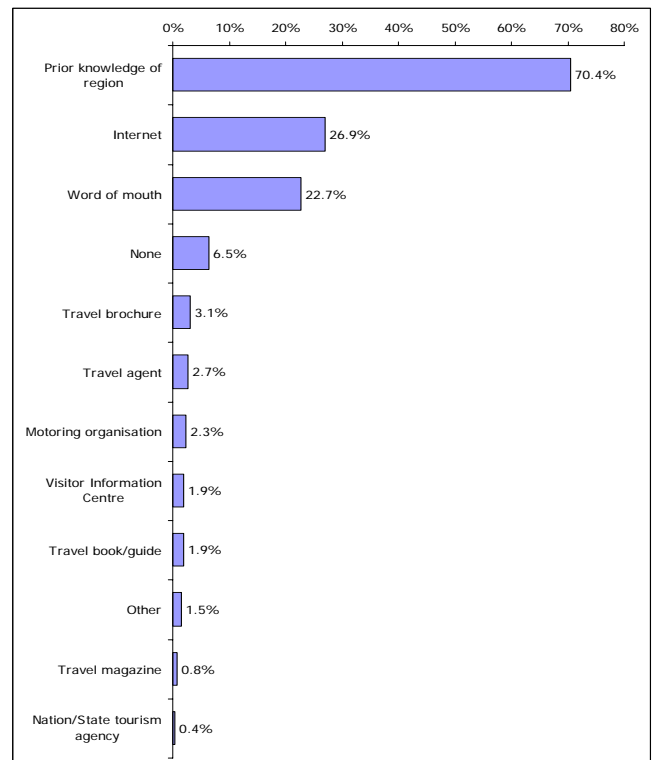


Figure 47: Information Sources Used by Wave

| Information Source          | 2006 | 2007 | 2008 | 2009 |
|-----------------------------|------|------|------|------|
| Prior knowledge of region   | 72%  | 72%  | 61%  | 70%  |
| Internet                    | 17%  | 14%  | 24%  | 27%  |
| Word of mouth               | 17%  | 12%  | 6%   | 23%  |
| None                        | 7%   | 22%  | 6%   | 7%   |
| Travel brochure             | 4%   | 7%   | 2%   | 3%   |
| Travel agent                | n.a. | 4%   | 3%   | 3%   |
| Motoring organisation       | n.a. | 1%   | 1%   | 2%   |
| Travel book/guide           | n.a. | 3%   | 1%   | 2%   |
| Visitor Information Centre  | n.a. | 2%   | 1%   | 2%   |
| Other                       | 11%  | 3%   | 4%   | 2%   |
| Travel magazine             | n.a. | 2%   | 0%   | 1%   |
| Nation/State tourism agency | n.a. | 0%   | 0%   | 0%   |

Figure 48: Information Sources by Visitation

This chart shows the percentage of responses for those on their first visit compared with those on repeat visits. For example, of those on their first visit, 40.0% use the internet to plan their trip. This compares with only 25.2% who are on a repeat visit.

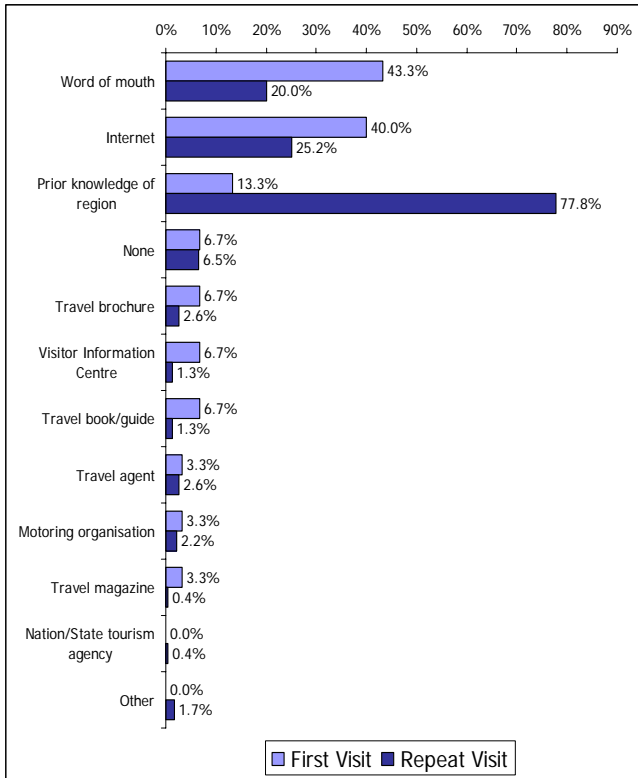


Figure 49: Information Sources by Origin

This table shows the percentage of responses for each origin category. For example, 79% of respondents who came from Brisbane use prior knowledge of the region to plan their trip.

| Information Source          | Brisbane | Other Queensland | Overseas | New South Wales | Victoria | Other States |
|-----------------------------|----------|------------------|----------|-----------------|----------|--------------|
| Prior knowledge of region   | 79%      | 78%              | 27%      | 35%             | 56%      | 50%          |
| Internet                    | 23%      | 24%              | 50%      | 47%             | 11%      | 50%          |
| Word of mouth               | 16%      | 19%              | 59%      | 29%             | 44%      | 50%          |
| None                        | 9%       | 3%               | 5%       | 12%             | 0%       | 0%           |
| Travel agent                | 3%       | 4%               | 0%       | 0%              | 0%       | 0%           |
| Motoring organisation       | 2%       | 3%               | 5%       | 0%              | 0%       | 0%           |
| Travel brochure             | 2%       | 3%               | 9%       | 6%              | 0%       | 0%           |
| Travel book/guide           | 2%       | 1%               | 5%       | 0%              | 0%       | 0%           |
| Nation/State tourism agency | 1%       | 0%               | 0%       | 0%              | 0%       | 0%           |
| Travel magazine             | 1%       | 0%               | 5%       | 0%              | 0%       | 0%           |
| Visitor Information Centre  | 0%       | 3%               | 9%       | 6%              | 0%       | 0%           |
| Other                       | 0%       | 3%               | 0%       | 6%              | 11%      | 0%           |

Figure 50: Information Sources by Length of Stay

This chart shows the percentage of responses for those staying for different periods of time. For example 67% of those staying 5+ nights use prior knowledge of the region to plan their trip.

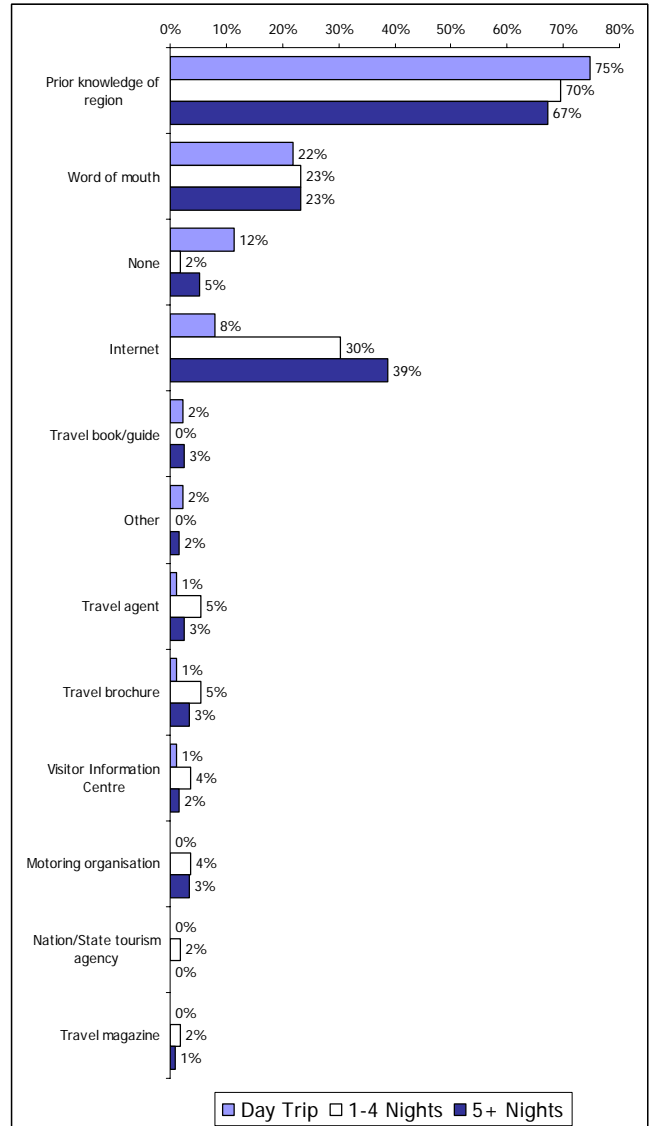


Figure 51: Advertising Recall

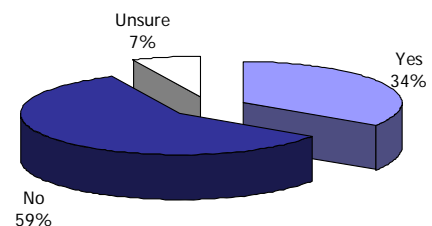


Figure 52: Advertising Recall by Wave

| Advertising Recall | Jan-04 | Jan-05 | Jan-06 | Jan-07 | Jan-08 | Jan-09 |
|--------------------|--------|--------|--------|--------|--------|--------|
| Yes                | 32%    | 36%    | 28%    | 38%    | 24%    | 34%    |
| No                 | 66%    | 59%    | 64%    | 49%    | 74%    | 59%    |
| Unsure             | 2%     | 5%     | 8%     | 13%    | 2%     | 7%     |

Figure 53: Advertising Recall by Origin

| Origin                       | Yes | No   | Unsure |
|------------------------------|-----|------|--------|
| Southern Downs and Toowoomba | 73% | 27%  | 0%     |
| Sunshine Coast               | 49% | 32%  | 19%    |
| Other QLD                    | 43% | 48%  | 10%    |
| Brisbane                     | 33% | 62%  | 4%     |
| Overseas                     | 27% | 73%  | 0%     |
| Melbourne                    | 14% | 71%  | 14%    |
| Gold Coast                   | 14% | 71%  | 14%    |
| NSW                          | 11% | 83%  | 6%     |
| ACT                          | 0%  | 100% | 0%     |
| Victoria                     | 0%  | 100% | 0%     |
| Other SEQ                    | 0%  | 0%   | 0%     |
| SA                           | 0%  | 0%   | 0%     |
| WA                           | 0%  | 100% | 0%     |
| Tasmania                     | 0%  | 0%   | 0%     |
| NT                           | 0%  | 0%   | 0%     |

# Accommodation Booking Method

## Key Findings:

- A reasonable proportion of visitors (9%) do not book ahead. This is particularly significant amongst those who are less than 25 years of age (50%) and those travelling alone (33%).
- The most popular booking method is a direct booking where the visitor has stayed before (37%). This is very important for those travelling as a family group (44%), those from Brisbane and those staying for 5+ nights (47%).
- The internet is used by almost one third of visitors (29%) whether this is to find and book or to find then to phone to make the booking.
- Use of the internet is particularly important amongst those in the 25-44 age group, those travelling as an adult couple and those on their first visit.

## Data Collected:

Visitors were asked to identify how they booked their accommodation in Caloundra. Nine alternatives were presented, including a category for those who are staying with friends or relatives or own their own unit. This category was not included in the data for commercial accommodation.

Figure 54: Accommodation Booking Method

| Booking Method                      | Jan-06 | Jan-07 | Jan-08 | Jan-09 |
|-------------------------------------|--------|--------|--------|--------|
| Direct Booking (stayed before)      | 23%    | 22%    | 22%    | 37%    |
| Internet to find and book           | 23%    | 14%    | 25%    | 17%    |
| Direct booking from home            | 23%    | 16%    | 17%    | 13%    |
| Internet to find then phoned direct | 6%     | 7%     | 13%    | 12%    |
| Did not book ahead                  | 4%     | 10%    | 8%     | 9%     |
| Other (Incl. Real Estate Agents)    | 17%    | 17%    | 5%     | 8%     |
| Travel Agent                        | 4%     | 13%    | 9%     | 4%     |
| Visitor Information Centre          | na     | 2%     | 1%     | 0%     |

Figure 55: Accommodation Booking Method by Visitation

| Booking Method                      | First Visit | Repeat Visit |
|-------------------------------------|-------------|--------------|
| Direct Booking (Stayed before)      | 11%         | 39%          |
| Internet to find and book           | 56%         | 14%          |
| Direct Booking from home            | 11%         | 13%          |
| Internet to find then phoned direct |             | 13%          |
| Did not book ahead                  | 11%         | 9%           |
| Other                               |             | 9%           |
| Travel Agent                        | 11%         | 3%           |

Figure 56: Accommodation Booking Method by Age

| Booking Method                      | 18-24 years | 25-44 years | 45+ years |
|-------------------------------------|-------------|-------------|-----------|
| Did not book ahead                  | 50%         | 7%          | 7%        |
| Direct Booking (Stayed before)      |             | 41%         | 36%       |
| Direct Booking from home            | 25%         | 13%         | 12%       |
| Travel Agent                        | 25%         | 4%          | 2%        |
| Internet to find and book           |             | 22%         | 16%       |
| Internet to find then phoned direct |             | 11%         | 14%       |
| Other                               |             | 2%          | 14%       |
| TOTAL                               | 100%        | 100%        | 100%      |

\* The number of respondents in the 18-24 age group is very small

Figure 57: Accommodation Booking Method by Travel Party

| Booking Method                      | Travelling Alone | Adult Couple | Family Group (Adults and Children) |
|-------------------------------------|------------------|--------------|------------------------------------|
| Direct Booking (Stayed before)      | 33%              | 5%           | 44%                                |
| Internet to find and book           |                  | 19%          | 18%                                |
| Direct Booking from home            | 33%              | 19%          | 12%                                |
| Internet to find then phoned direct |                  | 14%          | 12%                                |
| Did not book ahead                  | 33%              | 19%          | 6%                                 |
| Other                               |                  | 14%          | 6%                                 |
| Travel Agent                        |                  | 10%          | 3%                                 |
| Total                               | 100%             | 100%         | 100%                               |

Figure 58: Accommodation Booking Method by Whether Travelling with Children

| Booking Method                      | Travelling With Children | Travelling Without Children |
|-------------------------------------|--------------------------|-----------------------------|
| Direct Booking (Stayed before)      | 45%                      | 17%                         |
| Internet to find and book           | 18%                      | 13%                         |
| Internet to find then phoned direct | 12%                      | 13%                         |
| Direct Booking from home            | 10%                      | 20%                         |
| Did not book ahead                  | 6%                       | 17%                         |
| Other                               | 6%                       | 13%                         |
| Travel Agent                        | 3%                       | 7%                          |
| Total                               | 100%                     | 100%                        |

Figure 59: Accommodation Booking Method by Length of Stay

This table shows the booking method used by visitors staying in commercial accommodation for two groups categorised by their length of stay in Caloundra.

| Booking Method                      | 1-4 Nights | 5+ Nights |
|-------------------------------------|------------|-----------|
| Internet to find and book           | 23%        | 15%       |
| Did not book ahead                  | 19%        | 5%        |
| Direct Booking from home            | 16%        | 12%       |
| Internet to find then phoned direct | 16%        | 10%       |
| Other                               | 13%        | 6%        |
| Direct Booking (Stayed before)      | 10%        | 47%       |
| Travel Agent                        | 3%         | 4%        |
| Total                               | 100%       | 100%      |

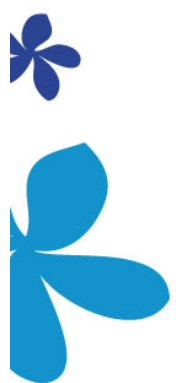
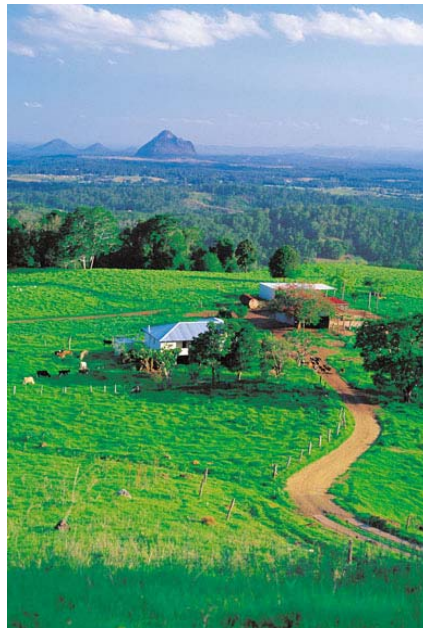
Figure 60: Accommodation Booking Method by Origin

| Booking Method                      | Brisbane | Other Queensland | Overseas | New South Wales | Victoria |
|-------------------------------------|----------|------------------|----------|-----------------|----------|
| Direct Booking (Stayed before)      | 46%      | 21%              | 20%      | 14%             | 50%      |
| Direct Booking from home            | 15%      | 11%              |          | 14%             |          |
| Internet to find and book           | 12%      | 25%              | 60%      | 14%             |          |
| Other                               | 10%      | 7%               |          |                 |          |
| Did not book ahead                  | 8%       | 7%               | 20%      | 29%             |          |
| Internet to find then phoned direct | 8%       | 18%              |          | 29%             | 50%      |
| Travel Agent                        | 2%       | 11%              |          |                 |          |
| Total                               | 100%     | 100%             | 100%     | 100%            | 100%     |



*Find your space*

## Details of the Trip



## **What types of experiences do they have?**

### **Where do they stay . . . . .**

Visitors to Caloundra most commonly stay in a rented apartment or holiday unit. The next most popular accommodation type is staying with friends and relatives followed by a caravan, cabin or tent. While the latter form of accommodation is more likely to be used by those under 45 years of age it is not related to income with a significant number in the upper income bracket choosing this form of accommodation. Those staying longer tend to use apartments or flats whereas those staying with friends and relatives tend to stay for less than 5 nights. First time visitors are more likely to stay in a hotel or resort than those who have been to Caloundra before. Those travelling in a family group (parents and children) tend to stay in a rented apartment or flat.

### **How long are they staying . . . . .**

Visitors to Caloundra can be divided into day visitors and those staying overnight. Day visitors tend to come from 'Other Queensland', particularly from other parts of the Sunshine Coast. Some even come from interstate and overseas as they move through the area and stay somewhere else within reach. A typical overnight visitor will stay for 7 nights or more, with a significant number staying for over 14 nights. Those staying 5 or more nights tend to belong to all age groups, come from interstate, overseas or 'Other' Queensland and are generally travelling as a family group (parents and children). A larger than average proportion of those in the higher income group also stay for 5 nights or more.

### **What they do . . . . .**

The number of activities undertaken is greater than the 2008 Wave, but much more in line with previous Waves. Last year visitor activity was affected by the inclement weather. The most popular activity undertaken by visitors in this Wave is to go to the beach, especially amongst those on their first visit. The opportunity to do this is clearly a major attractor to visitors. Going to a café or coffee shop is also a popular activity, especially amongst more frequent visitors and those that are staying for longer periods of time. Going to attractions such as the Australia Zoo and Aussie World is a popular activity amongst visitors from overseas and interstate. On the other hand, the Big Kart Track generally attracts those from within Queensland. It also appears that visitors from overseas undertake a far greater range of activities than those from interstate.

# Visitation

## Key Findings:

- Over three quarters (89%) have visited Caloundra before.
- The rate of return visitation is the highest amongst visitors from Queensland (98%).
- Over half of interstate visitors have been to Caloundra before.
- Less than one quarter (22%) of those on a day trip are first time visitors.
- Approximately half (49%) of those travelling as a family group have been to Caloundra 4 or more times.

## Data Collected:

Visitors were asked how many times they had travelled to Caloundra over the previous three years. Four alternative answers were possible, including 'Travelled to this area more than 3 years ago'.

Figure 61: Previous Visitation by Wave

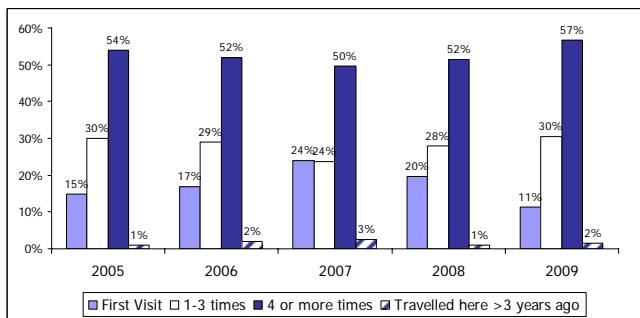


Figure 62: First Visit

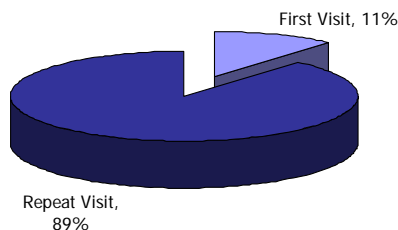


Figure 63: Origin by Previous Visitation (1)

| Origin           | First Visit | Repeat Visit |
|------------------|-------------|--------------|
| Brisbane         | 2%          | 98%          |
| Other Queensland | 8%          | 92%          |
| Overseas         | 64%         | 36%          |
| New South Wales  | 28%         | 72%          |
| Victoria         | 11%         | 89%          |
| Other States     | 50%         | 50%          |

Figure 64: Origin by Previous Visitation (2)

| Origin           | First Visit | 1-3 times | 4 or more times | Travelled here >3 years ago |
|------------------|-------------|-----------|-----------------|-----------------------------|
| Brisbane         | 2%          | 27%       | 69%             | 2%                          |
| Other Queensland | 8%          | 28%       | 62%             | 3%                          |
| Overseas         | 64%         | 32%       | 5%              |                             |
| New South Wales  | 28%         | 56%       | 17%             |                             |
| Victoria         | 11%         | 56%       | 33%             |                             |
| Other States     | 50%         |           | 50%             |                             |

Figure 65: Previous Visitation by Length of Stay

| Length of Stay | First Visit | 1-3 times | 4 or more times | Travelled here >3 years ago |
|----------------|-------------|-----------|-----------------|-----------------------------|
| Day Trip       | 21.9%       | 21.9%     | 56.3%           | 0.0%                        |
| 1-4 Nights     | 22.0%       | 18.0%     | 58.0%           | 2.0%                        |
| 5+ Nights      | 17.6%       | 35.3%     | 46.2%           | 0.8%                        |

Figure 66: Previous Visitation by Age

| Previous Visit?             | 18-24 years | 25-44 years | 45+ years |
|-----------------------------|-------------|-------------|-----------|
| First Visit                 | 13%         | 12%         | 11%       |
| 1-3 times                   |             | 31%         | 33%       |
| 4 or more times             | 88%         | 55%         | 55%       |
| Travelled here >3 years ago |             | 2%          | 2%        |
| Total                       | 100%        | 100%        | 100%      |

Figure 67: Previous Visitation by Travel Party

| Previous Visit?  | Travelling alone | Adult couple | Family Group (parents and children) | Friends and relatives with children | Friends and relatives (without children) | Independent adults in large group (no children) | TOTAL |
|------------------|------------------|--------------|-------------------------------------|-------------------------------------|--|---|-------|
| First Visit      | 17%              | 35%          | 35%                                 | 7%                                  | 7%                                       |   | 100%  |
| 1-3 Times Before | 6%               | 16%          | 60%                                 | 9%                                  | 5%                                       | 4%  | 100%  |
| 4+ Times Before  | 6%               | 21%          | 49%                                 | 15%                                 | 5%                                       | 4%  | 100%  |

Figure 68: Travel Party by Previous Visitation

| Visited before?  | Travelling alone | Adult couple | Family Group (parents and children) | Friends and relatives with children | Friends and relatives (without children) | Independent adults in large group (no children) |
|------------------|------------------|--------------|-------------------------------------|-------------------------------------|--|---|
| First Visit      | 26%              | 19%          | 8%                                  | 7%                                  | 15%                                      |   |
| 1-3 Times Before | 26%              | 24%          | 37%                                 | 23%                                 | 31%                                      | 33%   |
| 4+ Times Before  | 47%              | 57%          | 56%                                 | 71%                                 | 54%                                      | 67%   |
| Total            | 100%             | 100%         | 100%                                | 100%                                | 100%                                     | 100%  |

# Length of Stay

## Key Findings:

- Over one third (34%) of visitors are on a day trip.
- Amongst those staying overnight, over half (57%) stay for over seven nights.
- A stay of 5+ nights is the most common duration amongst those aged 25 or more.
- A stay of 5+ nights is also most common amongst those in a Family Group (parents and children) (54%) and those on a gross annual household salary of \$100,000+ (49%).
- The results are very similar to those found in previous waves.

## Data Collected:

Visitors were asked to identify how many nights they had or planned to stay in Caloundra City. Those who were only there for the day were categorised as a 'Day Tripper'.

Figure 69: Length of Stay

This chart shows the length of stay of all visitors, including those who do not stay overnight.

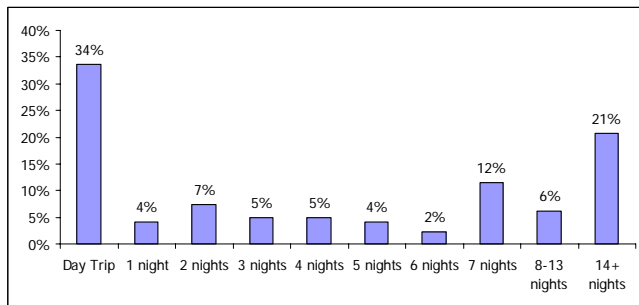


Figure 70: Length of Stay (Overnight Visitors)

This chart shows the length of stay of all visitors who stayed overnight.

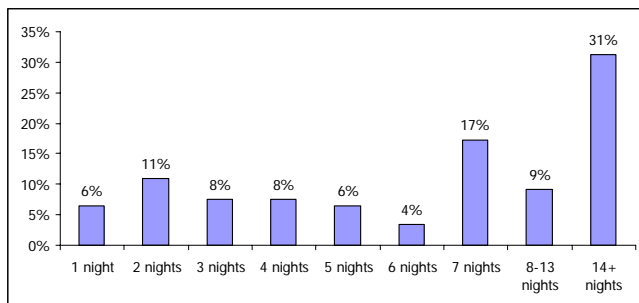


Figure 71: Length of Stay by Age (Overnight Visitors)

| Length of Stay | 18-24 years | 25-44 years | 45+ years |
|----------------|-------------|-------------|-----------|
| 1-4 Nights     | 66.7%       | 29.0%       | 31.2%     |
| 5+ Nights      | 33.3%       | 71.0%       | 68.8%     |
| Total          | 100.0%      | 100.0%      | 100.0%    |

Figure 72: Length of Stay by Origin (All Visitors)

| Length of Stay | Brisbane | Other Queensland | Overseas | Interstate |
|----------------|----------|------------------|----------|------------|
| Day Trip       | 31.3%    | 45.3%            | 22.7%    | 20.7%      |
| 1-4 Nights     | 23.9%    | 25.3%            | 18.2%    | 3.4%       |
| 5+ Nights      | 44.8%    | 29.3%            | 59.1%    | 75.9%      |
| Total          | 100%     | 100%             | 100%     | 100%       |

Figure 73: Length of Stay by Travel Party

| Length of Stay | Travelling alone | Adult couple | Family Group (parents and children) | Friends and relatives with children | Friends and relatives (without children) | Independent adults in large group (no children) |
|----------------|------------------|--------------|-------------------------------------|-------------------------------------|--|---|
| Day Trip       | 42%              | 30%          | 28%                                 | 44%                                 | 54%                                      | 56%   |
| 1-4 Nights     | 32%              | 33%          | 18%                                 | 13%                                 | 15%                                      | 22%   |
| 5+ Nights      | 26%              | 37%          | 54%                                 | 44%                                 | 31%                                      | 22%   |
| Total          | 100%             | 100%         | 100%                                | 100%                                | 100%                                     | 100%  |

Figure 74: Length of Stay by Income

| Length of Stay | Under \$20,000 | \$20,000-\$59,999 | \$60,000-\$99,999 | \$100,000+ |
|----------------|----------------|-------------------|-------------------|------------|
| Day Trip       | 43.8%          | 40.0%             | 32.2%             | 29.9%      |
| 1-4 Nights     | 31.3%          | 22.2%             | 16.9%             | 20.9%      |
| 5+ Nights      | 25.0%          | 37.8%             | 50.8%             | 49.3%      |
| Total          | 100%           | 100%              | 100%              | 100%       |

# Accommodation Type

## Key Findings:

- The most popular type of accommodation used is the apartment or holiday flat (33%).
- The next most popular accommodation type is staying with friends and relatives (24%).
- Staying with friends and relatives is particularly popular amongst those who stayed for 4 nights or less (33%).
- For those staying 5+ nights, the most popular type of accommodation is a rented apartment or holiday flat (38%).
- Except for those earning less than \$20,000 the holiday apartment or flat is the most popular with all income groups.
- Those travelling as a Family Group (parents and children) are more likely to stay in a rented apartment or holiday flat (42%) than in a hotel or resort (14%).
- Visitors are happy with the level of service they received at their accommodation (83% said that they are satisfied or very satisfied).

## Data Collected:

Visitors were presented with a list of accommodation types and asked to identify which most closely described where they were staying whilst in Caloundra. This list included a category for staying with friends and relatives.

Visitors were also asked to rate their accommodation according to three different aspects: Overall, value for money and service. A rating scale of 1 (Very Dissatisfied) to 5 (Very Satisfied) was used.

Figure 75: Accommodation by Visitation

| Accommodation Type            | First Visit | Repeat Visit |
|-------------------------------|-------------|--------------|
| Hotel/Resort                  | 26.7%       | 12.9%        |
| Friends or Relatives          | 26.7%       | 23.7%        |
| Rented Apartment/Holiday Flat | 20.0%       | 33.8%        |
| Motel                         | 6.7%        | 2.2%         |
| Rented House                  | 6.7%        | 2.9%         |
| Caravan/Cabin/Tent            | 6.7%        | 17.3%        |
| Other                         | 6.7%        | 6.5%         |
| Youth/Backpacker Hostel       |             | 0.7%         |
| Total                         | 100%        | 100%         |

Figure 76: Accommodation Type Used

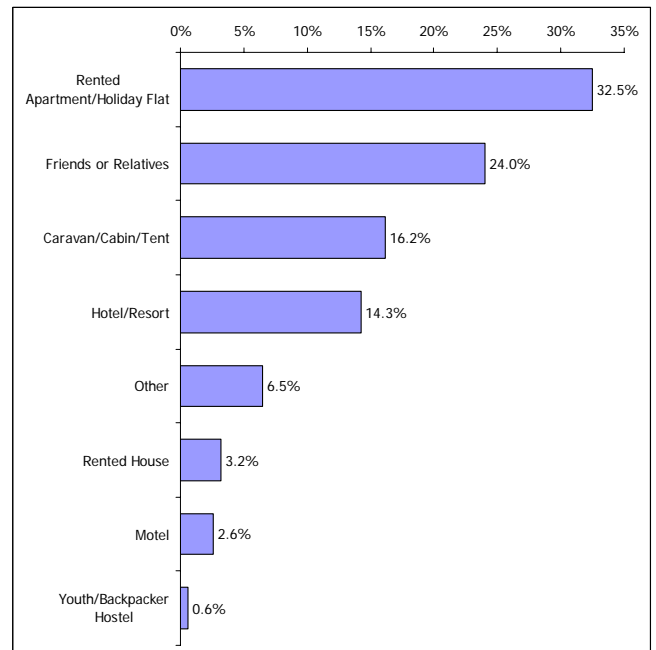


Figure 77: Accommodation by Age

| Accommodation Type            | 18-44 | 45+   |
|-------------------------------|-------|-------|
| Rented Apartment/Holiday Flat | 29.6% | 35.8% |
| Friends or Relatives          | 28.2% | 21.0% |
| Caravan/Cabin/Tent            | 16.9% | 14.8% |
| Hotel/Resort                  | 15.5% | 13.6% |
| Rented House                  | 4.2%  | 2.5%  |
| Motel                         | 2.8%  | 2.5%  |
| Youth/Backpacker Hostel       | 1.4%  |       |
| Other                         | 1.4%  | 9.9%  |
| Total                         | 100%  | 100%  |

Figure 78: Accommodation by Length of Stay

This chart shows the choice of accommodation type by respondents staying either 4 nights or less or 5+ nights. For example, 22% of those staying 4 nights or less stay in an apartment or holiday flat.

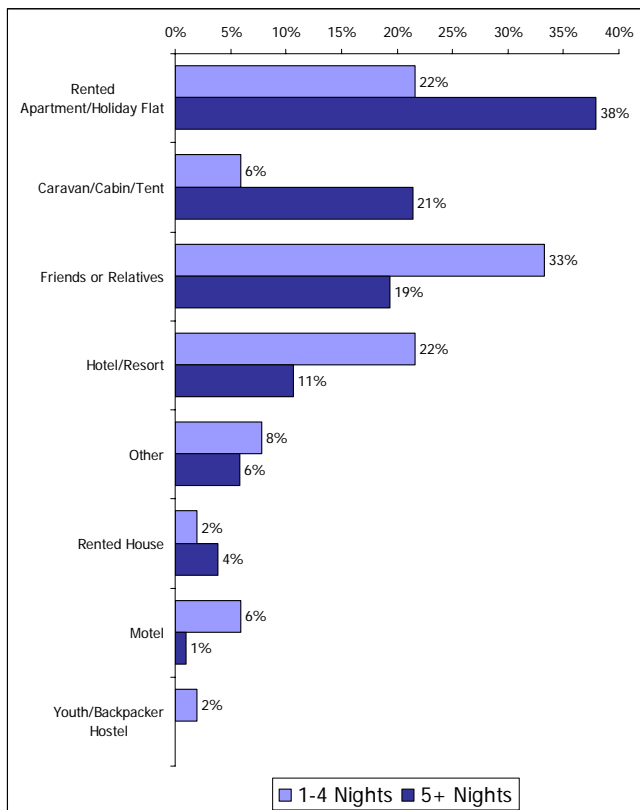


Figure 79: Accommodation by Income

| Accommodation Type            | Under \$20,000 | \$20,000-\$59,999 | \$60,000-\$99,999 | \$100,000 + |
|-------------------------------|----------------|-------------------|-------------------|-------------|
| Rented Apartment/Holiday Flat | 14.3%          | 40.0%             | 27%               | 43.2%       |
| Friends or Relatives          | 57.1%          | 24.0%             | 19%               | 27.3%       |
| Hotel/Resort                  |                | 16.0%             | 11%               | 6.8%        |
| Caravan/Cabin/Tent            |                | 12.0%             | 30%               | 9.1%        |
| Motel                         |                | 4.0%              |                   | 2.3%        |
| Rented House                  |                | 4.0%              | 5%                | 2.3%        |
| Youth/Backpacker Hostel       | 14.3%          |                   |                   |             |
| Other                         | 14.3%          |                   | 8%                | 9.1%        |
| Total                         | 100%           | 100%              | 100%              | 100%        |

Figure 80: Accommodation by Travel Party (Top Four)

| Accommodation Type            | Travelling alone | Adult couple | Family Group (parents and children) | Friends and relatives with children |
|-------------------------------|------------------|--------------|-------------------------------------|-------------------------------------|
| Rented Apartment/Holiday Flat | 11.1%            | 15.6%        | 42%                                 | 17.6%                               |
| Caravan/Cabin/Tent            | 11.1%            | 9.4%         | 18%                                 | 29.4%                               |
| Friends or Relatives          | 55.6%            | 31.3%        | 17%                                 | 35.3%                               |
| Hotel/Resort                  |                  | 21.9%        | 14%                                 | 11.8%                               |
| Rented House                  | 11.1%            |              | 5%                                  |                                     |
| Other                         |                  | 12.5%        | 4%                                  | 5.9%                                |
| Motel                         |                  | 9.4%         | 1%                                  |                                     |
| Youth/Backpacker Hostel       | 11.1%            |              |                                     |                                     |
| Total                         | 100%             | 100%         | 100%                                | 100%                                |

Figure 81: Satisfaction with Accommodation

This table shows the level of satisfaction of respondents with various aspects of their accommodation. Responses were gathered on a five point scale and referred to Overall satisfaction and satisfaction with the Level of Service received.

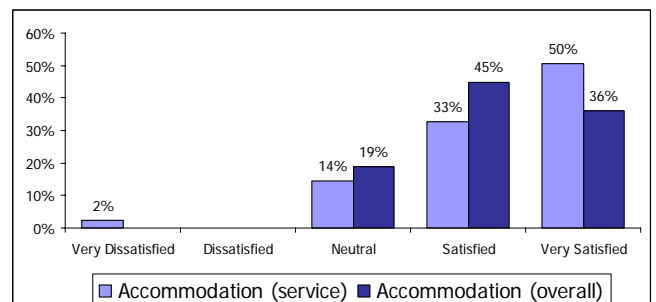


Figure 82: Satisfaction with Accommodation

This table shows the satisfaction data as a Mean. The higher the mean value, the greater the degree of satisfaction with that particular aspect of accommodation. The higher the standard deviation the greater the dispersion of the individual score around the Mean.

| Aspect of satisfaction  | N   | Mean | Std. Deviation |
|-------------------------|-----|------|----------------|
| Accommodation (service) | 125 | 4.3  | 0.89           |
| Accommodation (overall) | 189 | 4.2  | 0.72           |

# Activities Undertaken

## Key Findings:

- The number and variety of activities undertaken during the visitor's trip is much more than in the 2008 Wave (during which inclement weather was experienced). It is more like it has been in previous Waves.
- Going to the beach is the most popular activity (95%).
- The latter has been the most popular activity in all of the last 5 January Waves.
- Only a small proportion of visitors attend 'specialist' attractions like wineries and museums.
- Visiting these 'specialist' attractions is even less popular amongst those who have been to Caloundra 4+ times.
- Most activities are undertaken more often by those staying longer.

## Data Collected:

Visitors were asked to identify which activities they had engaged in during their stay. They were able to provide multiple answers to this question. The scores represent the percentage who indicated that they did.

Figure 83: Activities Participated in by Each Wave

| Activities                       | Jan-04 | Jan-05 | Jan-06 | Jan-07 | Jan-08 | Jan-09 |
|----------------------------------|--------|--------|--------|--------|--------|--------|
| Go to Beach                      | 67%    | 95%    | 91%    | 74%    | 49%    | 95%    |
| Visit a winery                   | 8%     | 4%     | 5%     | 4%     | 44%    | 3%     |
| Cafe/Coffee Shop                 | 67%    | 70%    | 60%    | 53%    | 32%    | 74%    |
| Go Shopping                      | 58%    | 66%    | 53%    | 49%    | 29%    | 56%    |
| Go on a walk                     | 66%    | 76%    | 53%    | 59%    | 28%    | 65%    |
| Visit markets                    | 37%    | 40%    | 30%    | 24%    | 28%    | 41%    |
| Eat at Restaurant                | 49%    | 54%    | 56%    | 51%    | 26%    | 52%    |
| Visit Friends/Relatives          | 42%    | 44%    | 39%    | 42%    | 24%    | 43%    |
| Visit a museum                   | 7%     | 1%     | 2%     | 5%     | 19%    | 2%     |
| Water Sports                     | 16%    | 62%    | 60%    | 29%    | 16%    | 55%    |
| Fishing                          | 14%    | 25%    | 24%    | 21%    | 14%    | 20%    |
| Visit Australia Zoo              | 15%    | 20%    | 15%    | 31%    | 13%    | 19%    |
| Go on boat cruise                | 9%     | 13%    | 10%    | 10%    | 12%    | 6%     |
| Play golf                        | 6%     | 6%     | 6%     | 11%    | 12%    | 6%     |
| Visit Glass House Mountains      | 19%    | 11%    | 9%     | 14%    | 9%     | 12%    |
| Vist Art/Craft Gallery           | 14%    | 13%    | 23%    | 12%    | 4%     | 15%    |
| Visit a National Park            | 16%    | 10%    | 7%     | 9%     | 3%     | 8%     |
| Visit Aussie World/Ettamogah Pub | 6%     | 7%     | 8%     | 7%     | 3%     | 12%    |
| Visit Mary Cairncross Park       | 40%    | 7%     | 5%     | 5%     | 2%     | 5%     |
| Visit Big Kart Track             | 4%     | 5%     | 5%     | 6%     | 1%     | 4%     |
| None of the above                | n.a.   | n.a.   | 1%     | 1%     | 1%     | 2%     |

Figure 84: Activities Participated in by Visitation

| Activities                       | First Visit | 1-3 Times Before | 4+ Times Before |
|----------------------------------|-------------|------------------|-----------------|
| Go to Beach                      | 100%        | 95%              | 93%             |
| Cafe/Coffee Shop                 | 77%         | 68%              | 78%             |
| Go on a walk                     | 60%         | 68%              | 65%             |
| Water Sports                     | 57%         | 54%              | 55%             |
| Eat at Restaurant                | 57%         | 48%              | 53%             |
| Go Shopping                      | 50%         | 61%              | 55%             |
| Visit markets                    | 47%         | 49%              | 37%             |
| Visit Friends/Relatives          | 40%         | 45%              | 42%             |
| Visit Australia Zoo              | 37%         | 21%              | 14%             |
| Visit Glass House Mountains      | 23%         | 19%              | 6%              |
| Fishing                          | 17%         | 18%              | 21%             |
| Vist Art/Craft Gallery           | 17%         | 20%              | 12%             |
| Visit Aussie World/Ettamogah Pub | 17%         | 16%              | 8%              |
| Go on boat cruise                | 10%         | 9%               | 4%              |
| Visit a National Park            | 10%         | 15%              | 5%              |
| Visit Mary Cairncross Park       | 7%          | 5%               | 4%              |
| Play golf                        | 3%          | 6%               | 6%              |
| Visit museum                     | 3%          | 4%               | 1%              |
| Visit a winery                   | 0%          | 6%               | 1%              |
| Visit Big Kart Track             | 0%          | 5%               | 5%              |
| None of the above                | 0%          | 3%               | 1%              |

Figure 85: Activities Participated in by Length of Stay

| Activities                       | Day Trip | 1-4 Nights | 5+ Nights |
|----------------------------------|----------|------------|-----------|
| Go to Beach                      | 90%      | 93%        | 100%      |
| Cafe/Coffee Shop                 | 66%      | 68%        | 85%       |
| Water Sports                     | 51%      | 36%        | 68%       |
| Go on a walk                     | 32%      | 70%        | 87%       |
| Visit Friends/Relatives          | 24%      | 46%        | 56%       |
| Go Shopping                      | 23%      | 57%        | 81%       |
| Eat at Restaurant                | 20%      | 55%        | 74%       |
| Visit markets                    | 16%      | 27%        | 68%       |
| Visit Australia Zoo              | 9%       | 20%        | 26%       |
| Visit Glass House Mountains      | 7%       | 9%         | 17%       |
| Fishing                          | 5%       | 14%        | 33%       |
| Vist Art/Craft Gallery           | 2%       | 7%         | 28%       |
| Play golf                        | 2%       | 0%         | 10%       |
| Visit a winery                   | 2%       | 2%         | 3%        |
| Visit Big Kart Track             | 2%       | 4%         | 6%        |
| Visit Aussie World/Ettamogah Pub | 2%       | 11%        | 19%       |
| None of the above                | 2%       | 2%         | 1%        |
| Go on boat cruise                | 1%       | 7%         | 9%        |
| Visit Mary Cairncross Park       | 1%       | 2%         | 9%        |
| Visit a National Park            | 1%       | 9%         | 14%       |
| Visit museum                     | 0%       | 0%         | 4%        |

Figure 86: Activities Participated in by Origin

| Activities                       | Brisbane | Other Queensland | Overseas | Interstate |
|----------------------------------|----------|------------------|----------|------------|
| Go to Beach                      | 96.3%    | 87.8%            | 100.0%   | 100.0%     |
| Cafe/Coffee Shop                 | 76.3%    | 68.9%            | 72.7%    | 79.3%      |
| Go on a walk                     | 68.9%    | 56.8%            | 63.6%    | 72.4%      |
| Water Sports                     | 59.3%    | 44.6%            | 54.5%    | 62.1%      |
| Go Shopping                      | 54.1%    | 51.4%            | 68.2%    | 69.0%      |
| Eat at Restaurant                | 51.9%    | 47.3%            | 59.1%    | 58.6%      |
| Visit Friends/Relatives          | 37.8%    | 41.9%            | 54.5%    | 58.6%      |
| Visit markets                    | 37.8%    | 32.4%            | 59.1%    | 69.0%      |
| Fishing                          | 17.8%    | 20.3%            | 18.2%    | 27.6%      |
| Visit Art/Craft Gallery          | 14.8%    | 9.5%             | 27.3%    | 20.7%      |
| Visit Australia Zoo              | 9.6%     | 18.9%            | 54.5%    | 34.5%      |
| Visit Glass House Mountains      | 8.1%     | 9.5%             | 36.4%    | 17.2%      |
| Visit Aussie World/Ettamogah Pub | 6.7%     | 10.8%            | 31.8%    | 20.7%      |
| Play golf                        | 5.9%     | 4.1%             | 13.6%    | 3.4%       |
| Go on boat cruise                | 5.2%     | 4.1%             | 22.7%    | 3.4%       |
| Visit a National Park            | 5.2%     | 5.4%             | 27.3%    | 17.2%      |
| Visit Mary Cairncross Park       | 4.4%     | 2.7%             | 18.2%    | 0.0%       |
| Visit Big Kart Track             | 3.0%     | 9.5%             | 0.0%     | 0.0%       |
| Visit a winery                   | 2.2%     | 2.7%             | 9.1%     | 0.0%       |
| Visit museum                     | 1.5%     | 2.7%             | 4.5%     | 0.0%       |
| None of the above                | 0.7%     | 4.1%             | 0.0%     | 0.0%       |

Figure 87: Activities Participated in by Age

| Activities                       | 18-24 years | 25-44 years | 45+ years |
|----------------------------------|-------------|-------------|-----------|
| Go to Beach                      | 100%        | 94%         | 94%       |
| Cafe/Coffee Shop                 | 69%         | 76%         | 74%       |
| Water Sports                     | 63%         | 63%         | 48%       |
| Visit Friends/Relatives          | 50%         | 44%         | 42%       |
| Eat at Restaurant                | 44%         | 51%         | 53%       |
| Go Shopping                      | 44%         | 49%         | 63%       |
| Go on a walk                     | 44%         | 59%         | 72%       |
| Fishing                          | 31%         | 27%         | 13%       |
| Visit markets                    | 31%         | 41%         | 43%       |
| Visit Australia Zoo              | 25%         | 17%         | 20%       |
| Visit Big Kart Track             | 13%         | 3%          | 4%        |
| Visit Aussie World/Ettamogah Pub | 13%         | 10%         | 13%       |
| Vist Art/Craft Gallery           | 6%          | 12%         | 18%       |
| Play golf                        | 6%          | 7%          | 5%        |
| Go on boat cruise                | 6%          | 6%          | 7%        |
| Visit a winery                   | 6%          | 2%          | 2%        |
| Visit Glass House Mountains      | 6%          | 8%          | 16%       |
| Visit Mary Cairncross Park       | 6%          | 0%          | 8%        |
| Visit museum                     | 0%          | 2%          | 2%        |
| Visit a National Park            | 0%          | 6%          | 12%       |
| None of the above                | 0%          | 3%          | 1%        |

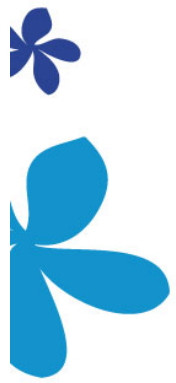




*Find your space*



## Visitor Satisfaction



## And how satisfied are the visitors?

### **Their overall satisfaction . . . . .**

Visitors to Caloundra are satisfied with most aspects of their experience. Most of those who are in a position to return (ie. not living overseas) have indicated that they would return, particularly those from Brisbane and other parts of Queensland. Only 2% of visitors expressed dissatisfaction with the destination.

### **Satisfaction with particular features . . . . .**

Visitors expressed strong satisfaction with their experience in Caloundra and the level of satisfaction for some aspects appears to have improved over the last 12 months. Amongst those aspects that have improved are signage, the tourist information available, public transport and the Caloundra CBD streetscape. Satisfaction with shopping has also improved. However, there has been a slight reduction in the level of visitor satisfaction with restaurants and attractions. This is relatively small and may be due to sampling. Of particular note is the very high level of satisfaction with the tourist information available on Caloundra. Interstate visitors express particularly high levels of satisfaction with most aspects, except for signage and beaches.

# Satisfaction

## Key Findings:

- 92% of visitors express overall satisfaction with Caloundra. This is similar to the January 2008 result.
- Satisfaction with all but four aspects of Caloundra has increased since the January 2008 Wave. Those where satisfaction has not increased mainly concern attractions.
- Over nine out of ten (91%) of visitors indicate that they would return to Caloundra. As would be expected, this is lowest amongst overseas and interstate visitors.
- The availability of tourist information, signage and shopping are the most commonly identified satisfactory aspect of Caloundra by all origin groups.
- The most common aspects that visitors are most dissatisfied with are public transport and the service in restaurants.

## Data Collected:

Visitors were presented with a list of various aspects of the Caloundra tourism product, including such things as the service in cafes and restaurants and attractions or the friendliness of locals. For each they were asked to indicate on a five point scale whether they were satisfied or not with that aspect – from Very Satisfied to Very Dissatisfied.

Where the results are shown as 'Satisfied' they represent the sum of both the Satisfied and Very Satisfied categories. The same goes for results presented as 'Dissatisfied' (ie the sum of both Dissatisfied and Very Dissatisfied).

Figure 88: Overall Satisfaction

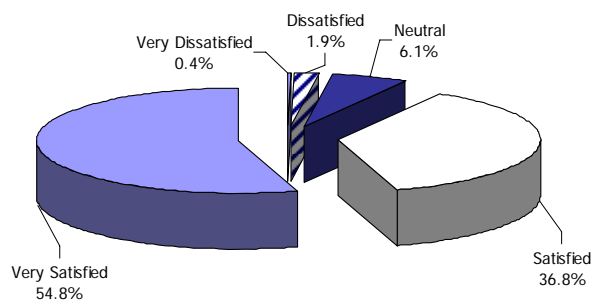


Figure 89: Intention to Return

Intention to return can sometimes be seen as a measure of satisfaction. However, it must be realised that some people are from overseas and unlikely to think about returning.

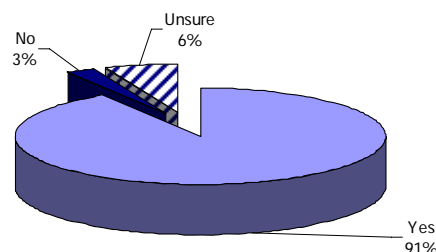


Figure 90: Intention to Return by Origin

To get a better understanding of intention to return the table below shows how this differs for people from different origins.

| Origin           | Intention to Return |       |        | Total |
|------------------|---------------------|-------|--------|-------|
|                  | Yes                 | No    | Unsure |       |
| Brisbane         | 93.9%               | 0.8%  | 5.3%   | 100%  |
| Other Queensland | 95.8%               | 2.8%  | 1.4%   | 100%  |
| Overseas         | 59.1%               | 13.6% | 27.3%  | 100%  |
| Interstate       | 89.3%               | 3.6%  | 7.1%   | 100%  |

Figure 91: Satisfaction with Aspects of Caloundra (Percent)

| Aspect of Caloundra                               | Very Dissatisfied | Dissatisfied | Neutral | Satisfied | Very Satisfied |
|---|-------------------|--------------|---------|-----------|----------------|
| Restaurants/cafes (service)                       | 0.9%              | 2.4%         | 19.0%   | 46.9%     | 30.8%          |
| Restaurants (overall)                             | 1.0%              | 2.4%         | 15.2%   | 47.1%     | 34.3%          |
| Public transport                                  | 2.6%              | 10.3%        | 17.9%   | 33.3%     | 35.9%          |
| Signage   | 2.4%              | 2.4%         | 8.7%    | 37.3%     | 49.2%          |
| Shopping (service)                                | 0.0%              | 0.0%         | 17.3%   | 47.6%     | 35.1%          |
| Shopping (overall)                                | 0.0%              | 1.7%         | 10.9%   | 42.7%     | 44.8%          |
| Attractions (value for money)                     | 0.0%              | 3.2%         | 22.3%   | 35.1%     | 39.4%          |
| Attractions (service)                             | 0.0%              | 1.2%         | 17.3%   | 45.7%     | 35.8%          |
| Attractions (overall)                             | 0.0%              | 3.7%         | 17.3%   | 40.7%     | 38.3%          |
| Availability of tourist information for Caloundra | 0.0%              | 0.4%         | 5.2%    | 32.1%     | 62.2%          |
| Beaches (overall)                                 | 2.3%              | 5.1%         | 13.1%   | 34.1%     | 45.5%          |
| Caloundra CBD Streetscape                         | 0.5%              | 3.0%         | 20.9%   | 33.8%     | 41.8%          |

Figure 92: Satisfaction with Aspects of Caloundra (Mean Scores)

Another way of showing satisfaction is to calculate the mean for each of the different aspects. The mean is determined by giving a value to each of the responses (Strongly Disagree = 1; Disagree=2; etc). The mean therefore takes into account the distribution and is a more meaningful expression of the level of satisfaction.

| Aspect of Caloundra                               | N   | Mean | Std. Deviation |
|---|-----|------|----------------|
| Availability of tourist information for Caloundra | 249 | 4.6  | 0.61           |
| Shopping (overall)                                | 239 | 4.3  | 0.73           |
| Signage   | 126 | 4.3  | 0.90           |
| Shopping (service)                                | 191 | 4.2  | 0.70           |
| Attractions (service)                             | 81  | 4.2  | 0.75           |
| Beaches (overall)                                 | 176 | 4.2  | 0.99           |
| Attractions (overall)                             | 81  | 4.1  | 0.83           |
| Caloundra CBD Streetscape                         | 201 | 4.1  | 0.88           |
| Restaurants (overall)                             | 210 | 4.1  | 0.82           |
| Attractions (value for money)                     | 94  | 4.1  | 0.86           |
| Restaurants/cafes (service)                       | 211 | 4.0  | 0.82           |
| Public transport                                  | 39  | 3.9  | 1.10           |

Figure 93: Total Satisfied by Wave

This table shows the percentage of visitors who suggested that they were 'Satisfied' and 'Very Satisfied' with particular aspects of Caloundra

| Aspects of Caloundra                              | 2006 Wave | 2007 Wave | 2008 Wave | 2009 Wave |
|---|-----------|-----------|-----------|-----------|
| Restaurants/cafes (service)                       | 71%       | 72%       | 80%       | 78%       |
| Restaurants (overall)                             | 75%       | 80%       | 82%       | 81%       |
| Public transport                                  | 63%       | 45%       | 58%       | 69%       |
| Signage   | 73%       | 83%       | 82%       | 87%       |
| Shopping (service)                                | 70%       | 88%       | 79%       | 83%       |
| Shopping (overall)                                | 66%       | 85%       | 84%       | 88%       |
| Attractions (value for money)                     | 64%       | 74%       | 80%       | 75%       |
| Attractions (service)                             | 77%       | 82%       | 83%       | 82%       |
| Attractions (overall)                             | 72%       | 84%       | 85%       | 79%       |
| Availability of tourist information for Caloundra | 83%       | 89%       | 87%       | 94%       |
| Beaches (overall)                                 | 95%       | 91%       | 79%       | 80%       |
| Caloundra CBD Streetscape                         | 81%       | 78%       | 71%       | 76%       |

Satisfaction with a number of aspects of Caloundra has improved over the last 12 months. Those with the greatest improvement are:

- Public Transport
- Signage
- Availability of tourist information
- Caloundra CBD Streetscape

Figure 94: Total Satisfied by Origin

This table shows the percentage of visitors from different origins who indicated that they are 'Satisfied' or 'Very Satisfied' with an aspect of Caloundra.

| Aspect of Caloundra                               | Brisbane | Other Queensland | Overseas | Interstate |
|---|----------|------------------|----------|------------|
| Availability of tourist information for Caloundra | 94%      | 94%              | 95%      | 97%        |
| Shopping (overall)                                | 89%      | 85%              | 84%      | 92%        |
| Signage   | 85%      | 85%              | 100%     | 87%        |
| Accommodation (service)                           | 85%      | 79%              | 91%      | 80%        |
| Shopping (service)                                | 81%      | 83%              | 88%      | 84%        |
| Restaurants (overall)                             | 79%      | 85%              | 85%      | 83%        |
| Accommodation (overall)                           | 78%      | 85%              | 81%      | 80%        |
| Restaurants/cafes (service)                       | 77%      | 78%              | 77%      | 83%        |
| Attractions (value for money)                     | 76%      | 74%              | 70%      | 75%        |
| Caloundra CBD Streetscape                         | 75%      | 69%              | 82%      | 88%        |
| Beaches (overall)                                 | 74%      | 90%              | 90%      | 75%        |
| Attractions (service)                             | 74%      | 83%              | 100%     | 87%        |
| Attractions (overall)                             | 72%      | 83%              | 100%     | 75%        |
| Public transport                                  | 69%      | 75%              | 60%      | 75%        |

Visitors from interstate are more satisfied with more aspects of Caloundra than those from other areas. These include:

- Accommodation (overall)
- Shopping (service)
- Shopping (overall)
- Attractions
- Availability of tourist information

They expressed the lowest level of satisfaction with the beaches.

Figure 95: Total Satisfied by Visitation

| Aspect of Caloundra                               | First Visit | Repeat Visit |
|---|-------------|--------------|
| Availability of tourist information for Caloundra | 93%         | 95%          |
| Accommodation (service)                           | 92%         | 82%          |
| Restaurants/cafes (service)                       | 90%         | 76%          |
| Attractions (service)                             | 90%         | 80%          |
| Attractions (overall)                             | 90%         | 77%          |
| Shopping (overall)                                | 88%         | 87%          |
| Signage   | 85%         | 87%          |
| Beaches (overall)                                 | 83%         | 79%          |
| Attractions (value for money)                     | 82%         | 74%          |
| Shopping (service)                                | 81%         | 83%          |
| Restaurants (overall)                             | 80%         | 82%          |
| Accommodation (overall)                           | 75%         | 82%          |
| Public transport                                  | 72%         | 69%          |
| Caloundra CBD Streetscape                         | 70%         | 76%          |



*Find your space*

# Appendices





# **APPENDIX A**

## Verbatim Reasons Why Caloundra Chosen

| Categories                            | Actual words used to describe why visitor chose Caloundra |                                      |                           |                                |   |
|---------------------------------------|---|--------------------------------------|---------------------------|--------------------------------|---|
| <b>Beach Related<br/>(41)</b>         | Beach (4)   | Beach and restaurants                | Beach.                    | Beaches (8)                    | Beaches - sheltered, good for kids        |
|                                       | Beaches and nice facilities for children                  | Beaches are fantastic                | Beaches are spacious      | Beaches great                  | Beaches safe                              |
|                                       | Beaut beaches   | Beautiful beach                      | Beautiful beaches         | Enjoy the beach and atmosphere | For the surf                              |
|                                       | Winds for wind surfing                                    | Nice beaches (2)                     | Good beaches for children | Cleanliness of beaches         | Great beaches (3)                         |
|                                       | Uncrowded beaches   | Great for beach walking              | Love the beaches          | Surf                           | Uncrowded beaches                         |
|                                       | Great beach without being crowded                         | Like the beach                       | Many different beaches    |                                |   |
| <b>Familiarity<br/>(18)</b>           | Been here before and loved it.                            | Tradition for family                 | Refresh old memories      | Habit and family tradition     | Enjoyed it last time                      |
|                                       | Been before   | Strong memories from previous visits | Always come here          | Because we enjoy staying here  |   |
|                                       | Been here before and loved it.                            | Tradition for family                 | Refresh old memories      | Habit and family tradition     | Enjoyed it last time                      |
|                                       | Been before   | Strong memories from previous visits | Always come here          | Because we enjoy staying here  |   |
| <b>Family Attraction<br/>(31)</b>     | Family (2)  | Family and friends here              | Family commitments        | Family connections             | Family here (2)                           |
|                                       | Family live here (5)                                      | Family living (2)                    | Family reasons (5)        | Family reunion (2)             | Visit family (2)                          |
|                                       | Visit friends and family                                  | Visiting a friend                    | Visiting friends          | Where sister lives             | Friends                                   |
|                                       | Relatives here  | To see family                        | Kids like it              |                                |   |
| <b>Family/Child Friendly<br/>(18)</b> | Child friendly  | Good family atmosphere               | Good family destination   | Good for families              | Nice for families.                        |
|                                       | Safe for children   | Family oriented area                 | Very kid friendly         | Family friendly (2)            | Family environment, especially beachfront |
|                                       | Family location   | Family oriented                      | Family beach atmosphere   |                                |   |
|                                       | Friendliness  | Friendliness of locals               | Friendly                  | Nice, friendly place           |   |

|                                       |  |   |   |   |   |
|---------------------------------------|--|---|---|---|---|
| <b>Accommodation Related (7)</b>      | Good resort                                    | Availability of accommodation   | Free accommodation with family and friends          | Free accommodation  | Fairly cheap accommodation                    |
|                                       | Excellent accommodation, both choice and price | Great choice and variety of accommodation                             |   |   |   |
| <b>Proximity/ Convenience (43)</b>    | Closest beach                                  | Closest beach to home   | Closest to Brisbane                                 | Close and convenient.   | Convenience                                   |
|                                       | Close to Brisbane (11)                         | Convenient from home.   | Close to friends                                    | Close to friends of ours.   | Close to home (4)                             |
|                                       | Close to Redcliffe                             | Convenient to Brisbane  | Convenient to home                                  | Distance to travel  | Nice place close to home                      |
|                                       | Easy close holiday from Brisbane               | Proximity to Brisbane (8)   | Proximity to home                                   | Reasonably close to home (3)  | Convenience                                   |
|                                       | Proximity                                      |   |   |   |   |
| <b>Quiet/Relaxed (23)</b>             | Lay back                                       | Layback lifestyle (2)   | Relaxed (2)   | Relaxing (5)  | Relaxing destination                          |
|                                       | Relaxing place to be                           | Relaxing with plenty to do  | Relaxing.   | Very relaxed place to be  | Nice and quiet                                |
|                                       | Nice place to sit and relax                    | Quiet location  | Quiet   | Quiet and peaceful  | Laid back                                     |
|                                       | Unhurried, no rush holiday.                    | Peaceful  |   |   |   |
| <b>Not Over Developed (4)</b>         | Not over-crowded                               | Uncommercial  | Not overcrowded                                     | Low key destination   |   |
| <b>General Positive Comments (18)</b> | So nice  | This is paradise (3)  | Great location                                      | Great place   | Top spot                                      |
|                                       | Good place                                     | Beautiful (3)   | Beautiful area                                      | It is perfect   | Very clean                                    |
|                                       | Very pretty                                    | Lovely area   | Attractive  | Great place   |   |
| <b>Activity Related (6)</b>           | Sky diving location                            | Kite boarding   | Kite surfing area                                   | It has everything - surf and quiet water for fishing. Also easily accessible. | Attend a club meeting                         |
|                                       | Attend a swim carnival                         |   |   |   |   |
| <b>Facility Related (17)</b>          | Shopping                                       | The walkways  | Good places to shop (2)                             | Has everything we need  | Central play area - water facilities and pool |
|                                       | Picnic areas always available                  | Gold Coast beaches are better but access to facilities here is better | Facilities are good. Don't need to go anywhere else | Has everything for all ages   | Facilities good                               |
|                                       | All facilities here                            |   | Low key but   | Good shops  | Facilities excellent                          |

|                            |   |  |   |                                  |                           |
|----------------------------|---|--|---|----------------------------------|---------------------------|
|                            |   |  | lovely range of walking areas                 | close to beach                   |                           |
|                            | Like a big country town with all the amenities      | Convenient to all amenities                    |   |                                  |                           |
| <b>Weather Related (4)</b> | Nice weather  | Ocean is warmer                                | Oceans warmer than further south              | Because it is sunny and fun!     |                           |
| <b>Comparative (14)</b>    | Quieter than the Gold coast                         | Quieter than the Gold coast                    | More relaxed than Gold Coast or Mooloolaba    | More to do than on Bribie Island | Not as busy as Gold Coast |
|                            | Change from all the hustle and bustle of Mooloolaba | Change from Mooloolaba                         | To have a change of scenery                   | Curiosity                        | Different                 |
|                            | Different feel to other places on coast             | As beautiful as anywhere on the Sunshine Coast | Never been before so wanted to explore        | Not as crowded as the Gold Coast |                           |
| <b>Cost Related (3)</b>    | Economical  | Affordability                                  | Affordable compared with Noosa and Mooloolaba |                                  |                           |
| <b>Recommended (4)</b>     | Suggested by relatives                              | Word of mouth                                  | Friend recommended                            | Asked by friends to come here    |                           |
| <b>Other (7)</b>           | Own property  | House is here                                  | Off the beaten track                          | Comfortable                      | Enjoy a day trip          |
|                            | Don't need a car as can walk everywhere             | Love rock pools                                |   |                                  |                           |

# **APPENDIX B**

## Alternative Destinations Considered

|                               |    |                             |    |
|-------------------------------|----|-----------------------------|----|
| <b>Sunshine Coast</b>         |    | <b>Southeast Queensland</b> |    |
| Alexandra Headlands           | 1  | Redcliffe                   | 3  |
| Coolum                        | 6  | SouthBank                   | 2  |
| Buderim                       | 1  | Stradbroke Island           | 2  |
| Hinterland, Montville, Maleny | 7  | Surfers Paradise            | 2  |
| Kings Beach                   | 2  | Bribie Island               | 6  |
| Mooloolaba                    | 17 | Brisbane                    | 1  |
| Peregian Beach                | 3  | Broadbeach                  | 1  |
| Maroochydore                  | 7  | Shorncliff                  | 1  |
| Noosa                         | 18 | Pottsville                  | 1  |
| Mapleton                      | 1  | Gold Coast                  | 19 |
| Sunshine Beach                | 1  |                             |    |
| Kawana                        | 1  | <b>Northern NSW</b>         |    |
| Gympie                        | 1  | Tweed Heads                 | 1  |
| Other parts of Sunshine Coast | 1  | Northern NSW                | 1  |
| All Sunshine Coast south      | 2  | Ballina                     | 1  |
| Rainbow Beach                 | 1  |                             |    |
|                               |    | <b>Interstate</b>           |    |
| <b>Fraser Coast</b>           |    | Adelaide                    | 2  |
| Fraser Island                 | 1  | Melbourne                   | 2  |
| Hervey Bay                    | 2  | Kakadu                      | 1  |
|                               |    | Perth                       | 1  |
| <b>Other Queensland</b>       |    |                             |    |
| Whitsundays                   | 1  | <b>Overseas</b>             |    |
| Mackay                        | 1  | New Zealand                 | 1  |
| Rockhampton                   | 1  | Fiji                        | 1  |

# **APPENDIX C:** Detailed Brisbane Visitor Origin

The origin of visitors from Brisbane was analysed in detail by grouping postcodes into the categories shown in the table below. The categories are described in the following paragraphs.

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 Bribie Island in the north east, and from Mt Mee in the south west to Deception Bay in the south east.

The **Western** suburbs of Brisbane 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.

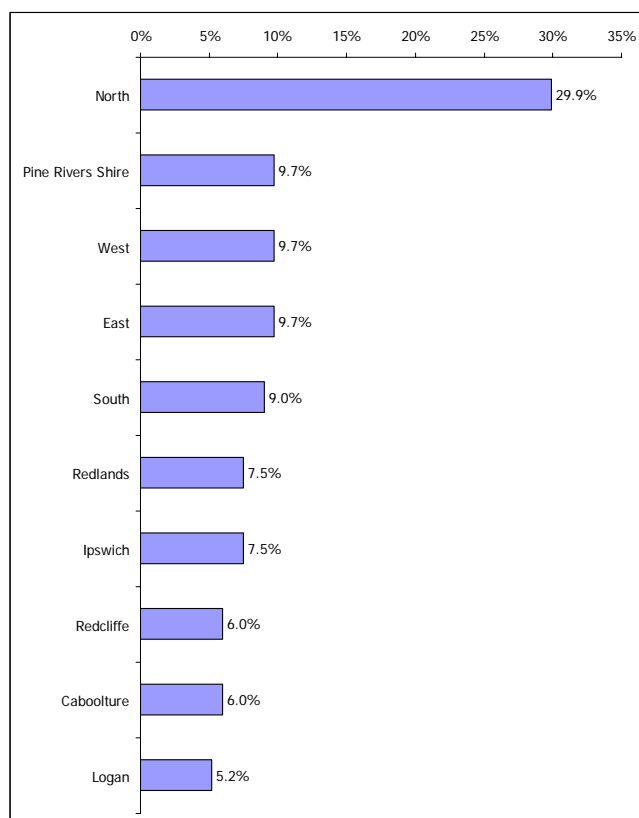
The **Redland** Shire includes from Thornside in the North to Mount Cotton in the south west and Redland Bay in the south east (also includes Stradbroke, Peel, Coochiemudlo, Macleay, Lamb, Karragarra, Pannikin and Russell Islands).

**Redcliffe** City includes from Kippa-Ring in the North West to Scarborough in the north east and from Clontarf Beach in the south east to Woody Point in the south east.

**Logan City** includes the area 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.



Information pertaining to shire/city boundaries was determined by Tourism Queensland based on an analysis of respective Council websites. The shire / city divisions are current as of March 2005, obtained via each.

# **APPENDIX D:** Questionnaire used in the survey



# Caloundra Visitor Survey

## January 2009

### SECTION 1 – About your visit to this area

**Q1. What is the *main* purpose of your trip to Caloundra? (READ OUT)**

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

**Q2. Do you recall seeing any advertising for Caloundra before leaving home?**

- 1 Yes
- 2 No
- 3 Unsure

**Q3. How many other times have you travelled to Caloundra over the last three years?**

- 1 Never before, this is my first visit
- 2 1 – 3 times
- 3 4 or more times
- 4 Travelled to this area more than 3 years ago

**Q4. What information sources did you use when planning your trip to Caloundra? (READ OUT) (CIRCLE ALL THAT APPLY)**

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

**Q5. How many nights have you or do you plan to spend in Caloundra?**

- |                 |               |
|-----------------|---------------|
| 0 Day trip only | 5 5 nights    |
| 1 1 night       | 6 6 nights    |
| 2 2 nights      | 7 7 nights    |
| 3 3 nights      | 8 8-13 nights |
| 4 4 nights      | 9 14+ nights  |

**C1. What activities have you done or do you plan to do during your stay in Caloundra? (READ OUT) (CIRCLE ALL THAT APPLY)**

- 1 Water sport/s
- 2 Go fishing
- 3 Go to café/coffee shop
- 4 Eat at a restaurant
- 5 Visit an art/craft gallery
- 6 Visit friends/relatives
- 7 Go to the beach
- 8 Play golf
- 9 Go shopping
- 10 Go on a boat/cruise
- 11 Visit markets
- 12 Visit a museum
- 13 Visit a winery
- 14 Visit the Glass House Mountains
- 15 Visit Australia Zoo
- 16 Visit the Big Kart Track
- 17 Visit Aussie World/ Ettamogah Pub
- 18 Visit Mary Cairncross Park
- 19 Visit a National Park
- 20 Go on a walk
- 21 None of the above

**ONLY VISITORS ON OVERNIGHT TRIP TO ANSWER C6 to Q7. DAY VISITORS SKIP TO Q8 (Section 2).**

**Q6. What is the *main* type of accommodation you will be using during your stay in Caloundra?**

- 1 Rented apartment/holiday flat
- 2 Motel
- 3 Hotel/Resort
- 4 Rented house
- 5 Bed & Breakfast/Guest house
- 6 Youth or backpacker hostel
- 7 Caravan/cabin/tent
- 8 Friend's or relative's property
- 9 Other (*please specify*)

**Q7. How did you book your accommodation in Caloundra? (READ OUT)**

- 1 Staying with friends or relatives
- 2 Did not book ahead, just arrived
- 3 Booked direct with the accommodation (stayed before)
- 4 Booked direct with accommodation before leaving home (not stayed there before)
- 5 Booked through a Travel Agent
- 6 I used the internet to find and book accommodation
- 7 I used the internet to find accommodation and phoned them to book
- 8 Visitor Information Centre
- 9 Other (*please specify*)

## SECTION 2 – Satisfaction

**Q8.** On a scale of 1 to 5, where 1 equals Very Dissatisfied and 5 equals Very Satisfied, please indicate your **OVERALL** satisfaction with Caloundra.

|                      | Very<br>Dissatisfied |   |   |   |   | Very<br>Satisfied |
|----------------------|----------------------|---|---|---|---|-------------------|
| Overall satisfaction | 1                    | 2 | 3 | 4 | 5 |                   |

**Q9.** Do you plan to return to Caloundra in the next 3 years for a holiday?

- 1 Yes
- 2 No
- 3 Unsure

**Q10.** 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 Caloundra. (CIRCLE ONE ONLY ON EACH ROW)

|   | Very<br>Dissatisfied |   |   |   |   | Satisfied |
|---|----------------------|---|---|---|---|-----------|
| 1. Restaurants/Cafes – service                        | 1                    | 2 | 3 | 4 | 5 | NA        |
| 2. Restaurants/Cafes – overall                        | 1                    | 2 | 3 | 4 | 5 | NA        |
| 3. Availability of Public Transport                   | 1                    | 2 | 3 | 4 | 5 | NA        |
| 4. Accommodation – service                            | 1                    | 2 | 3 | 4 | 5 | NA        |
| 5. Accommodation – overall                            | 1                    | 2 | 3 | 4 | 5 | NA        |
| 6. Shopping – service                                 | 1                    | 2 | 3 | 4 | 5 | NA        |
| 7. Shopping – overall                                 | 1                    | 2 | 3 | 4 | 5 | NA        |
| 8. Friendliness of locals                             | 1                    | 2 | 3 | 4 | 5 | NA        |
| 9. Attractions – value for money                      | 1                    | 2 | 3 | 4 | 5 | NA        |
| 10. Attractions - service                             | 1                    | 2 | 3 | 4 | 5 | NA        |
| 11. Attractions – overall                             | 1                    | 2 | 3 | 4 | 5 | NA        |
| 12. Beaches overall                                   | 1                    | 2 | 3 | 4 | 5 | NA        |
| 13. Availability of tourist information for Caloundra | 1                    | 2 | 3 | 4 | 5 | NA        |
| 14. Caloundra CBD Streetscape                         | 1                    | 2 | 3 | 4 | 5 | NA        |

## SECTION 3 – Motivation

**Q11.** On the following scale of 1 to 5, where 1 equals Strongly Disagree and 5 equals Strongly Agree, please indicate which of the following factors motivated you to take this trip. (READ OUT) (CIRCLE ONE ONLY ON EACH ROW)

|   | Strongly<br>Disagree |   |   |   | Strongly<br>Agree |
|---|----------------------|---|---|---|-------------------|
| 1. To take a family holiday                                 | 1                    | 2 | 3 | 4 | 5                 |
| 2. To spend time with my partner                            | 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 experience nature                                     | 1                    | 2 | 3 | 4 | 5                 |
| 6. To experience local culture and heritage                 | 1                    | 2 | 3 | 4 | 5                 |
| 7. To be active and adventurous                             | 1                    | 2 | 3 | 4 | 5                 |
| 8. To enjoy the peace and quiet of an uncrowded destination | 1                    | 2 | 3 | 4 | 5                 |
| 9. To socialise with friends or meet new people             | 1                    | 2 | 3 | 4 | 5                 |
| 10. To get off the beaten track                             | 1                    | 2 | 3 | 4 | 5                 |

**Q12.** If your friends ask you why you chose Caloundra for this trip (rather than anywhere else), what would you say to them?

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**Q13.** When you were planning your trip, what other destinations did you consider (TOP THREE)?

- 0 None
- 1
- 2
- 3

## SECTION 4 – Some information about you

**Q14.** Where do you usually live?

Town/City/Suburb (Australia Only):

Postcode (Australia Only):

Country (Overseas only):

**Q15.** Please complete details for one person in the travel party only:

**a. Gender**

- 1 Male
- 2 Female

**b. Which age bracket do you fall into?**

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

**Q16.** How would you describe your immediate travel party? (READ OUT)

- 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 Other (*please specify*)

**Q17.** What is your approximate annual household income before tax? If from overseas please estimate in Australian dollars.

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 \$139,999
8. \$140,000 to \$159,999
9. \$160,000+
10. Refused

As part of quality control procedures, some interviews are verified. If required, would you mind if my supervisor contacted you regarding your participation in this survey?

Name:

\_\_\_\_\_

Phone Number:

\_\_\_\_\_

*THANK YOU FOR YOUR TIME.  
WE HOPE YOU ENJOY YOUR STAY IN QUEENSLAND.*

**Interviewer to complete at conclusion of interview**

Time Completed (please circle):      AM      PM

Day/Date Completed: \_\_\_\_\_

Location of Interview: \_\_\_\_\_

Interviewer Name: \_\_\_\_\_

