Caloundra

Visitor Survey

September 2005

in partnership with

and

EXECUTIVE SUMMARY

Introduction

The Sunshine Coast region receives approximately 16% of domestic visitors to Queensland, two-thirds of these domestic visitors originate from within Queensland (67%), according to the National Visitor Survey (NVS June 2005).

Where possible results of the June 2005 Caloundra Visitor Survey have been compared with previous waves conducted in June 2003 and June 2004, however, differences in sample size and respondent recruitment may have a greater influence in the results than changes in visitor perceptions or experiences.

Visitor Profile

• In June 2005, Visitor Survey results indicate that the majority of visitors were from Australia, specifically from within South East Queensland (56%) and Victoria (15%). Overseas visitors accounted for 14% of respondents.

• The majority of Queensland respondents were repeat visitors to Caloundra, with only one percent indicating this trip was their first visit. Just under half of all other Australians and 56% of overseas respondents were on their first visit to Caloundra.

• Adult couples (44%) and family groups (23%) were the most common travel party types. Two thirds of respondents aged 55 years or over travelled as an adult couple, whereas 40% of those aged 55 years or under travelled as part of a family group.

• Three quarters of respondents visited Caloundra for holiday/leisure purposes.

• Not surprisingly, the majority of Brisbane respondents used their own, or a friend's or relatives vehicle to travel to Caloundra.

• Two-thirds of respondents stayed at least one night in the region (66%), with a quarter of those overnight respondents staying between five and seven nights. Brisbane respondents tended to have a shorter length of stay than respondents from other parts of Australia.

• The most popular form of accommodation was a rented apartment or holiday flat. Three-quarters of respondents stayed in Caloundra (i.e. Kings Beach, Shelley Beach, Dicky Beach and Bulcock Beach). One third of respondents from outside Brisbane stayed with friends or relatives.

• Four out of five respondents had an annual household income less than $80,000.

• One third of respondents were aged 25 to 44 years, and another third were aged 45 to 64 years.

• Almost all respondents were motivated to visit Caloundra to relax and rejuvenate.

Information Sources and Advertising

• More than half of the respondents used either no information sources, or prior knowledge of the region when planning their trip to Caloundra. This was particularly strong for Brisbane respondents, which is not surprising given the majority from Brisbane were repeat visitors.

• Word of mouth and the Internet were other important tools, as well as travel agents for non-Brisbane respondents.

• More than two thirds of respondents did not recall seeing any advertising for the Caloundra region before they left home. For those that did, most saw the advertising on television.

EXECUTIVE SUMMARY Continued

Activities and Places Visited

•Maroochydore, Mooloolaba and the Sunshine Coast Hinterland were the most common places visited during the trip

• The five most popular activities across all respondents were:
  • Go to the beach
  • Go on a walk
  • Go to a café/coffee shop
  • Go shopping
  • Eat at a restaurant

Visitor Satisfaction

• Ninety percent of respondents were either satisfied or very satisfied with their overall experience in Caloundra.

• The majority of respondents were either satisfied or very satisfied with:
  • The beaches (95%)
  • Friendliness of the locals (95%)
  • Personal safety and security (93%)
  • Accommodation overall (93%)
  • Range of accommodation (92%)

• Areas of some ambivalence to respondents (neutral scores) were:
  • Range of shopping
  • Value for money when shopping

• The aspects of their trip that may require some attention, given the level of dissatisfaction recorded, were:
  • Nightlife/entertainment (22%)
  • Current level of development (19%)
  • Availability of public transport (8%)

• Respondents aged 55 years and over often registered satisfaction with the nightlife and entertainment in Caloundra, and the opening hours and value for money in Caloundra's restaurants and cafes.

• The majority of respondents intend to return to Caloundra within the next three years for a holiday.

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INTRODUCTION

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

The overall outcome of the research is to help guide the development of the Caloundra area. It is anticipated that information gathered from this research will be used by Tourism Queensland, Tourism Sunshine Coast, Caloundra Tourism, and tourism operators to maximise tourism in the area and to provide input into future directions and marketing strategies.

The specific objectives of the research are:
- to profile visitors to Caloundra in terms of demographics and travel behaviour;
- to measure visitor satisfaction with specific aspects of Caloundra;
- to determine improvements that could be made in Caloundra to increase visitor satisfaction;
- to determine what motivates people to visit Caloundra; and
- To track the profile and opinions of visitors to Caloundra over time.

This report presents the findings of the June 2005 Caloundra Visitor Survey.

METHODOLOGY

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

The questionnaire used for the study was designed by Tourism Queensland and is based on the Standard Visitor Survey. The questionnaire included questions about visitor demographics, travel behaviour, improvements, motivations and satisfaction.

Interviewing for the June 2005 wave was conducted from 23 May until 12 June 2005, coinciding with the region's low tourist season. In total, 203 surveys were completed. Community Solutions was commissioned to undertake the interviews and trained by Tourism Queensland staff. The results of the June 2005 wave are presented in isolation, and also in relation to results of previous waves of the survey conducted in June 2003 and June 2004.

Interviewing for the June 2003 wave was conducted from 07 June until 25 June 2003. In total, 329 interviews were completed. Local volunteers, who were recruited by Caloundra Tourism and trained by Tourism Queensland staff, conducted the interviews.

Interviewing for the June 2004 wave was conducted from 06 June until 23 June 2004. In total, 421 interviews were completed. Oaki Doaki Business Consultants were commissioned to undertake the interviews and were trained by Tourism Queensland staff.

It should be noted that interviewing for the June 2005 wave was only undertaken in costal areas of Caloundra, while various Hinterland locations were included in June 2004 and June 2003. Regional stakeholders decided to exclude Hinterland interviewing locations from the June 2005 wave of this survey due to the implementation of a separate Sunshine Coast Hinterland Visitor Survey. The considerable difference in interviewing locations between June 2005 and earlier waves of this research, limits the ability to interpret changes across waves. Readers are advised to use caution when comparing June 2005 results with earlier waves. Detailed information on the interviewing locations of each wave are presented on the next page.

METHODOLOGY (Continued)

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

TABLE 1 – LOCATION AND PROPORTION OF INTERVIEWS COMPLETED

Interview Location	June 2003		June 2004		June 2005	
	N	%	N	%	N	%
Bulcock Beach	32	10%	46	11%	110	54%
Kings Beach	22	7%	45	11%	44	22%
Moffat Beach	5	2%	61	15%	29	14%
Bulcock St	53	16%	56	13%	11	5%
Golden Beach	16	5%	1	0.2%	4	2%
Dicky Beach	18	6%		-	2	1%
Happy Valley	11	3%		-	2	1%
Maple St	74	23%	47	11%		-
Mary Cairncross Park	72	22%	155	37%		-
Currimundi		-	4	1%		-
Australia Zoo		-	6	1%		-
Caloundra Hospital Markets	6	2%		-		-
Sunland Shopping Centre	5	2%		-		-
Golden Beach Foreshore	5	2%		-		-
Bunya St, Maleny	1	0.3%		-		-
Golden Beach Shopping Centre	1	0.3%		-		-
Not specified	8	2%		-	1	0.5%
Total	**329**	**100%**	**421**	**100%**	**203**	**100%**

Data from all completed questionnaires was entered into a database and prepared for analysis. Analysis was undertaken using *SPSS* statistical analysis software. The results are presented in tables and graphs, supplemented with written comment and interpretation. The findings are presented in an order considered appropriate and relevant to the client's needs and not necessarily in the order questions were asked of respondents.

Selected questions in the survey were analysed by cross-tabulation (or by means comparison for scaled questions) to find any notable differences between different groups of respondents. The **sub-groups** of particular interest for this research are determined by visitors' **age, origin** and **by wave**. To improve the validity of results at the subgroup level some variables were recoded, collapsing some response categories to allow for more robust subgroup sample sizes.

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

SUNSHINE COAST VISITOR PROFILE

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

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

SUNSHINE COAST VISITOR PROFILE

Visitors

• According to the National Visitor Survey (NVS), the Sunshine Coast received 16% of domestic visitors to Queensland in the year ended June 2005. Two-thirds of these were intrastate visitors (67%).

FIGURE 1 – DOMESTIC VISITORS ('000) TO THE SUNSHINE COAST

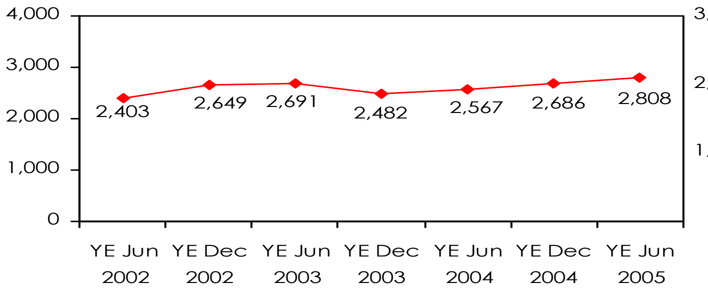
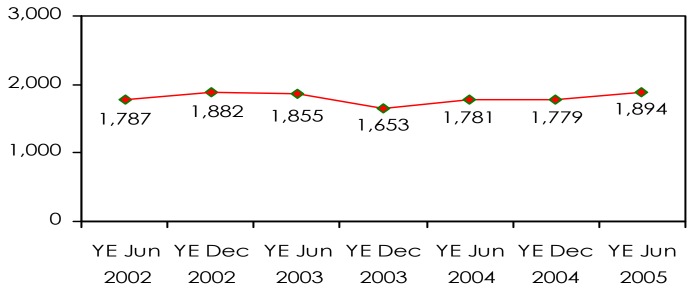


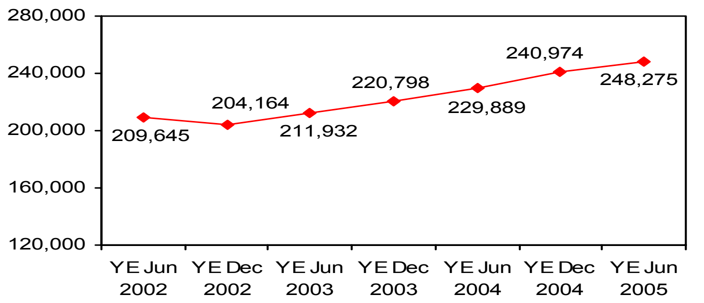
FIGURE 2 – INTRASTATE VISITORS ('000) TO THE SUNSHINE COAST



(Source: TRA – NVS, 2002-2005)

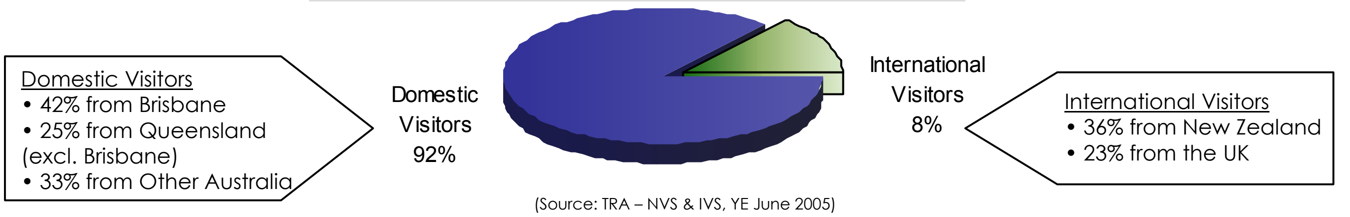
• The International Visitor Survey (IVS), estimates the Sunshine Coast received 12% of all international visitors who visited Queensland in the year ended June 2005.

FIGURE 3 – INTERNATIONAL VISITORS TO THE SUNSHINE COAST



(Source: TRA – IVS, 2002-2005)

FIGURE 4 – TOTAL VISITORS TO THE SUNSHINE COAST



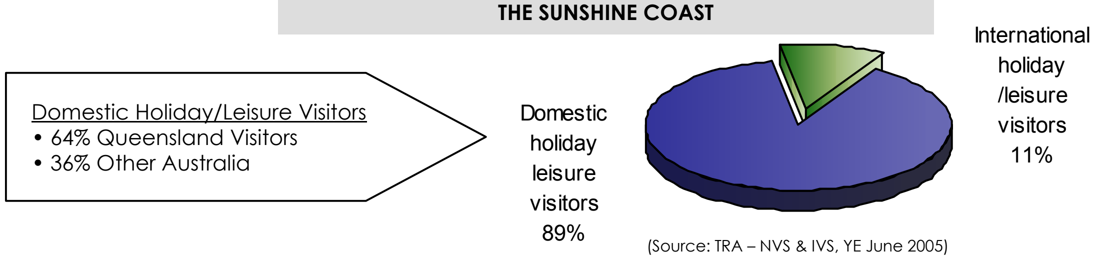
(Source: TRA – NVS & IVS, YE June 2005)

• The majority of visitors to the Sunshine Coast region were domestic.
• Similarly 86% of the total visitor nights spent on the Sunshine Coast region were by domestic visitors.
• The average length of stay for domestic visitors was 4.2 nights, while for international visitors it was 7.8 nights.

Holiday Leisure Visitors

• The NVS estimates that 58% of domestic visitors to the Sunshine Coast are holiday/leisure visitors.

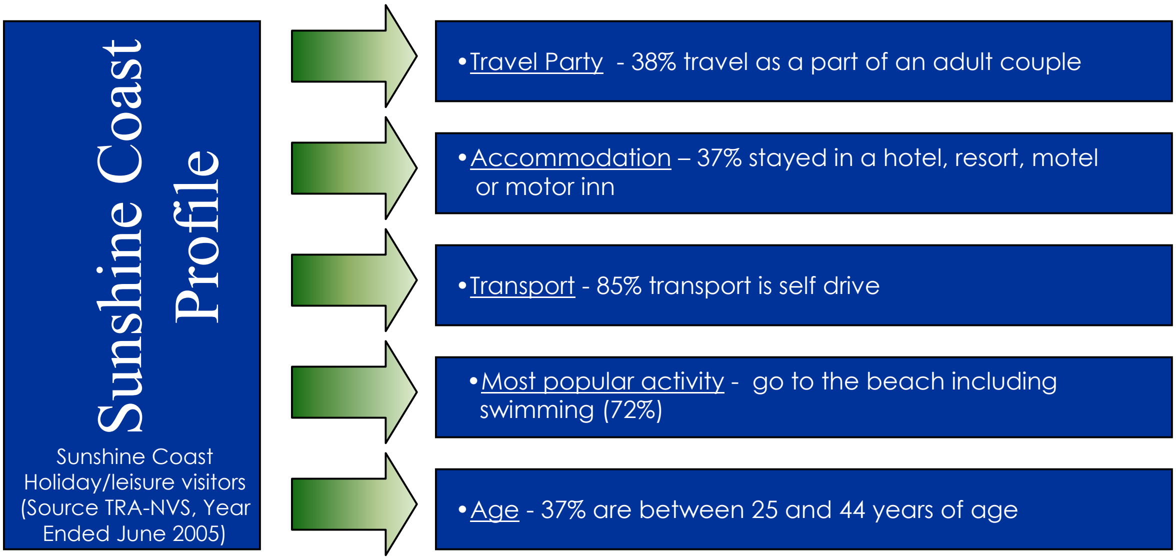
FIGURE 5 – HOLIDAY/LEISURE VISITORS TO THE SUNSHINE COAST



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

SUNSHINE COAST VISITOR PROFILE
Holiday Leisure Visitors (continued)

FIGURE 6 – SUNSHINE COAST HOLIDAY/LEISURE VISITOR PROFILE



Day Trippers

• According to the NVS, the Sunshine Coast received 14% of all Australians who went on a day trip within Queensland in the year ended June 2005.
• Over half of all domestic day trippers to the Sunshine Coast were from Brisbane (57%), and one third were from the Sunshine Coast (28%).

TABLE 2 – ACTIVITIES PARTICIPATED IN BY DOMESTIC DAYTRIPPERS ON THE SUNSHINE COAST

Activity	% of Daytrip Visitors to the Sunshine Coast
Social and others	82%
Outdoor or nature activities	35%
Sports or active outdoor activities	13%
Local attractions or tourist activities	9%
Arts, heritage or festival activities	9%

(Source: TRA – NVS, YE June 2005)

Awareness, Preference and Intention for the Sunshine Coast

• Forty-two percent (42%) of the Australian population interviewed by Roy Morgan Research (Holiday Tracking Survey, Year Ended June 2005) remember having seen, read or heard advertising for the Sunshine Coast.
• Sixteen percent (16%) of the Australian population interviewed would like to spend a holiday at the Sunshine Coast in the next two years and 6% intend to spend at least one night in the region on their next trip.
• Seven percent (7%) have spent at least one night on the Sunshine Coast for a holiday in the last 12 months.

Tourism Impacts and Support

• Positive - tourism has many positive impacts, providing 20% of employment and contributing $733 million to the local Sunshine Coast economy in 1998/99
• Negative - creates crowding, queuing, traffic congestion, inadequate parking, litter, noise, an increase in crime rates at the key tourism precincts, increased Council rates, and retail and restaurant prices.

TABLE 3 – SUNSHINE COAST TOURISM EMPLOYMENT

Total regional employment	Tourism Full – Time Equivalent	Tourism share of Sunshine Coast employment	Sunshine Coast's Share of Queensland tourism employment
71,700 positions	14,500 positions	20.2%	12.1%

(Source: OESR – The Contribution of International and Domestic Visitor Expenditure to the Queensland Regional Economies, 1998-1999)

TABLE 4 – SUNSHINE COAST

GRP Sunshine Coast	Tourism GRP Sunshine Coast	Tourism share of Sunshine Coast's GRP	Sunshine Coast's share of QLD tourism GSP
$4,586 million	$733 million	16.0%	11.6%

(Source: OESR – The Contribution of International and Domestic Visitor Expenditure to the Queensland Regional Economies, 1998-1999)

Commercial Accommodation

• The Survey of Tourist Accommodation (STA) shows that average room occupancy rate increased slightly from 63.9% in the year ended December 2003 to 64.9% in the year ended December 2004.
• The average length of stay in commercial accommodation on the Sunshine Coast is 3.5 days.
• Access Economics (TARDIS) forecasts an increase in the average room occupancy on the Sunshine Coast to 65.9% over the two years to June 2006.

TABLE 5 – SUNSHINE COAST COMMERCIAL ACCOMMODATION

Hotels, Motels, Guest Houses and Serviced Apartments	
Rooms Available	4,859
Average Room Occupancy Rate	64.9%
Average Daily Room Rate	$130.19

(Source: Australian Bureau of Statistics, Survey of Tourist Accommodation, Year Ended December 2004)

OVERVIEW OF FINDINGS

OVERVIEW OF FINDINGS

Table 6 summarises the key findings from the June 2003, 2004 and 2005 Caloundra Visitor Surveys.

TABLE 6 – SUMMARY OF KEY RESULTS (ALL RESPONDENTS)

	June 2003	June 2004	June 2005
Where do they come from?	50% Queensland (31% Brisbane)	71% Queensland (44% Brisbane)	57% Queensland (41% Brisbane)
Who do they travel with?	55% adult couple	36% adult couple	44% adult couple
What type of transport did they use?	79% own/friends/relatives vehicle 16% air transport	87% own/friends/relatives vehicle 13% air transport	68% own/friends/relatives vehicle 21% air transport
What is their annual household income?	Between $40,000 & $59,999 and $20,000 & $39,999(27% each)	24% earn between $40,000 & $59,999	21% earn between $20,000 & $39,999
What is their age?	27% 55 to 64 years	22% 35 to 44 years	21% 55 to 64 years
What motivated them to visit?	86% to relax and rejuvenate	---	91% to relax and rejuvenate
What information sources did they use to plan their trip?	55% none or had prior knowledge of the area	74% none or had prior knowledge of the area	55% none or had prior knowledge of the area
Do they recall seeing advertising?	44% recalled seeing advertising. 61% saw it on TV	33% recalled seeing advertising. 54% saw it on TV	30% recalled seeing advertising. 63% saw it on TV
Why did they visit?	69% holiday/leisure purposes	71% holiday/leisure purposes	73% holiday/leisure purposes
How many times had they visited in the past three years?	34% 4 or more times	51% 4 or more times	40% 4 or more times
How long did they stay?	57% stayed at least one night (23% 5-7 nights)	37% stayed at least one night (5-7 nights & 14+ nights, 24% each)	66% stayed at least one night (26% 5-7 nights)
What accommodation did they use?	48% rented apartment or flat	---	49% rented apartment or flat
Where was their accommodation located?	59% Caloundra	59% Caloundra	75% Caloundra
How did they book their accommodation?	---	33% booked directly before leaving home	21% booked directly before leaving home
Where else did they go?	73% Sunshine Coast Hinterland 53% Mooloolaba	63% Sunshine Coast Hinterland 36% Maroochydore	43% Maroochydore 35% Mooloolaba
What activities did they do?	71% went to a café or coffee shop	75% went on a walk	94% went to the beach
What were they most satisfied with?	95% friendliness of locals; 94% personal safety/security; 94% beaches	96% accommodation range; 94% beaches	95% beaches; 95% friendliness of locals
What were they most dissatisfied with?	23% nightlife/entertainment	42% availability of public transport	22% nightlife/entertainment
What improvements did they suggest?	10% restrict development	10% more or improved parking	13% restrict development
Do they intend to return?	---	82% intend to return	79% intend to return

Base: June 2003 (n=329) Base: June 2004 (n=421) Base: June 2005 (n= 203)

OVERVIEW OF FINDINGS

Table 7 provides a summary of the June 2005 findings when respondents are separated into two groups, those under 55 years of age and those 55 years and over.

TABLE 7 – SUMMARY OF RESULTS BY AGE

	Under 55 years	55 years and over
Where do they come from?	47% Brisbane	37% Brisbane
Who do they travel with?	39% family group	64% adult couple
What type of transport did they use?	61% own/friend/relatives vehicle	75% own/friend/relatives vehicle
What is their annual household income?	25% earn between $60,000 & $79,999	33% earn under $20,000
What motivated them to visit?	91% to relax and rejuvenate	91% to relax and rejuvenate
What information sources did they use to plan their trip?	52% none or had prior knowledge of the area	60% none or had prior knowledge of the area
Why did they visit?	70% holiday/leisure purposes	76% holiday/leisure purposes
How many times had they visited in the past three years?	41% 4 or more times	39% 4 or more times
How long did they stay?	74% stayed at least one night (27% stayed 5-7 nights)	61% stayed at least one night (23% stayed 5-7 nights)
What accommodation did they use?	52% rented apartment or flat	48% rented apartment or flat
Where was their accommodation located?	72% Caloundra	77% Caloundra
How did they book their accommodation?	Travel agent and did not book prior to arrival (17% each)	32% booked directly before leaving home
Where else did they go?	37% Maroochydore 33% Mooloolaba	51% Maroochydore 41% Sunshine Coast Hinterland
What activities did they do?	95% went to the beach	94% went to the beach
What were they most satisfied with?	97% beaches; 96% friendliness of locals	96% beaches; 96% accommodation overall; 96% accommodation availability
What were they most dissatisfied with?	24% nightlife/entertainment	18% nightlife entertainment
What improvements did they suggest?	13% restrict development	13% restrict development
Do they intend to return?	81% intend to return	78% intend to return

Base: Under 55 years (n= 105)   Base: 55 years and over (n = 93)

OVERVIEW OF FINDINGS

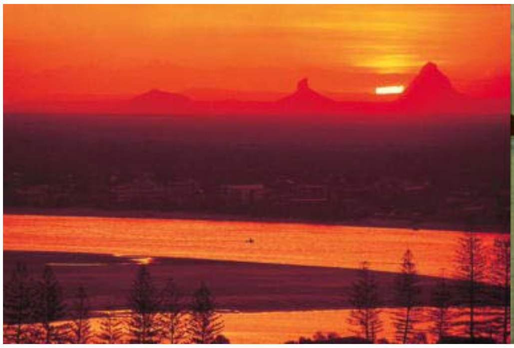
Table 8 provides a summary of the June 2005 findings when respondents are separated into two groups, those from Brisbane and those from the rest of Australia.

TABLE 8 – SUMMARY OF RESULTS BY ORIGIN

	Brisbane	Rest of Australia
Who do they travel with?	40% adult couple	46% adult couple
What type of transport did they use?	89% own/friends/relatives vehicle	63% own/friends/relatives vehicle
What is their annual household income?	22% earn between $60,000 & $79,999	29% earn between $20,000 & $39,999
What is their age?	21% 35 to 44 years	24% 55 to 64 years
What motivated them to visit?	91% to relax and rejuvenate	93% to relax and rejuvenate
What information sources did they use to plan their trip?	69% none or had prior knowledge of the area	53% none or had prior knowledge of the area
Why did they visit?	75% holiday/leisure purposes	71% holiday/leisure purposes
How many times had they visited in the past three years?	67% 4 or more times	40% between 1 & 3 times
How long did they stay?	63% stayed at lest one night (44% stayed 2-3 nights)	67% stayed at least one night (46% stayed 5-14 nights)
What accommodation did they use?	62% rented apartment or flat	39% rented apartment or flat
Where was their accommodation located?	78% Caloundra	68% Caloundra
How did they book their accommodation?	26% booked directly before leaving home	25% booked directly before leaving home
Where else did they go?	34% Sunshine Coast Hinterland 23% Mooloolaba	53% Maroochydore 39% Mooloolaba
What activities did they do?	94% went to the beach 87% go for a walk	94% went to the beach 86% go for a walk
What were they most satisfied with?	100% beaches; 95% personal safety and security; 95% accommodation availability	97% accommodation range; 95% friendliness of locals
What were they most dissatisfied with?	19% current level of development	23% current level of development
What improvements did they suggest?	12% restrict development	16% restrict development
Do they intend to return?	85% intend to return	81% intend to return

Base: Brisbane(n = 83) Base: Rest of Australia (n = 90)

RESPONDENT PROFILE




RESPONDENT PROFILE

Overview

- Almost half of the respondents travelled to Caloundra as part of an adult couple
- The annual household income of most respondents was under $80,000
- A slightly higher proportion of respondents were female
- One third of respondents were aged between 45 and 64 years
- 57% of respondents were from Queensland, followed by Victoria and Overseas (15% and 14% respectively).

Who do they travel with?

The largest proportion of respondents travelled to Caloundra as part of an adult couple, followed by family groups. In June 2005, the third highest proportion of respondents were travelling alone.

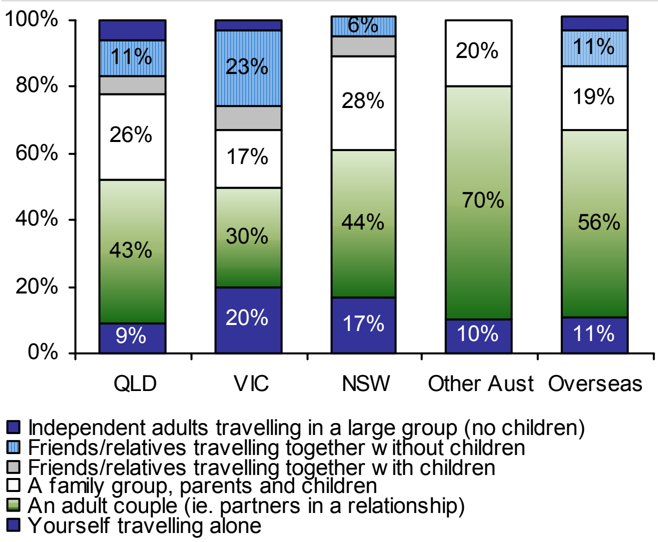
Adult couples were the most popular travel party type across all Australian and overseas origins.

TABLE 9 – TRAVEL PARTY

Travel Party	June 2003	June 2004	June 2005
An adult couple (I.e. partners in a relationship)	55%	36%	44%
A family group, parents and children	15%	29%	23%
Yourself travelling alone	7%	7%	13%
Friends/relatives travelling together without children	18%	13%	12%
Friends/relatives travelling together with children	3%	10%	5%
Independent Adults in group (no Children)	2%	3%	5%

Base: June 03 (n=329); June 04 (n=418); June 05 (n=200).
Top 3 responses for each wave are highlighted.

FIGURE 7 – TRAVEL PARTY BY ORIGIN



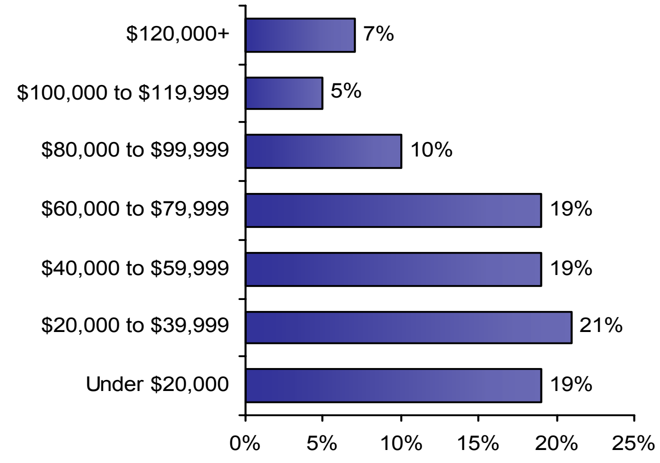
Base: June 2005 (n=200)

What is their annual household income?

The majority of respondents had an annual household income less than $80,000 per year with 21% earning between $20,000 and $39,999.

In June 2003 and June 2004, the greatest proportion of respondents also had an annual household income of $20,000 to $39,999.

FIGURE 8 – ANNUAL HOUSEHOLD INCOME



Base: June 2005 (n =134)

What is their gender?

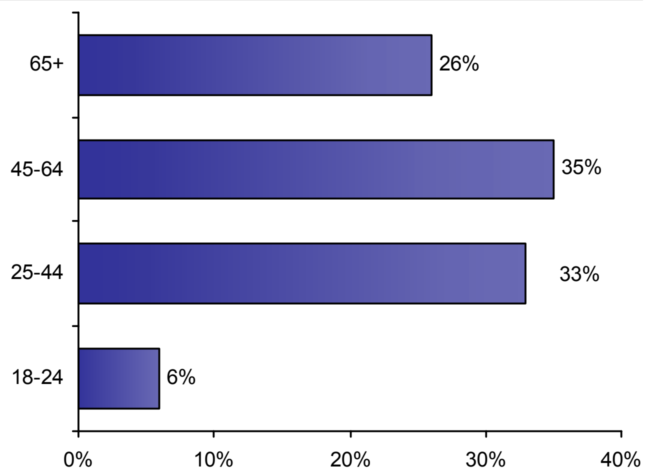
A higher proportion of females were interviewed (57%).

What is their age?

The greatest proportion of respondents were aged between 45 and 64 years (35%). Only a small percentage of respondents were 24 years or under (6%).

Across waves respondents are of similar age. In the June 2005 and 2003 waves, the largest proportion of respondents were aged between 55 and 64 years (21% and 27% respectively), and in the June 2004 wave the largest proportion were aged between 35 and 44 years (22%).

FIGURE 9 – AGE



Base: June 2005 (n = 199)

RESPONDENT PROFILE

Where do they come from?

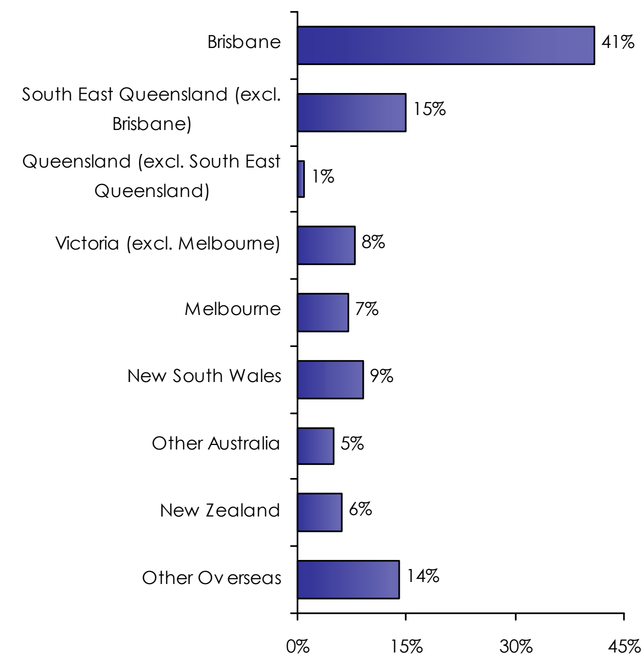
Forty-one percent of respondents originated from Brisbane, with a further 15% originating from South East Queensland (excluding Brisbane). Fifteen percent of respondents originated from Victoria, while 14% were from overseas.

Of the respondents who originated from Brisbane, one third were from the Northern suburbs of Brisbane (28%) and 17% were from the Eastern suburbs. Equal proportions of respondents originated from the Southern suburbs of Brisbane and the Pine Rivers Shire (10% each).

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

Note: South East Queensland encompasses the areas of Rainbow Beach, Gympie, Landsborough, Beerburrum, Samford, Goodna, Ipswich, Jimboomba, Springbrook and Coolangatta through to the coastline.

FIGURE 10 – ORIGIN



Base: June 2005 (n = 201)

Previous waves show that respondents originating from Brisbane consistently represent the largest proportion of visitors surveyed.

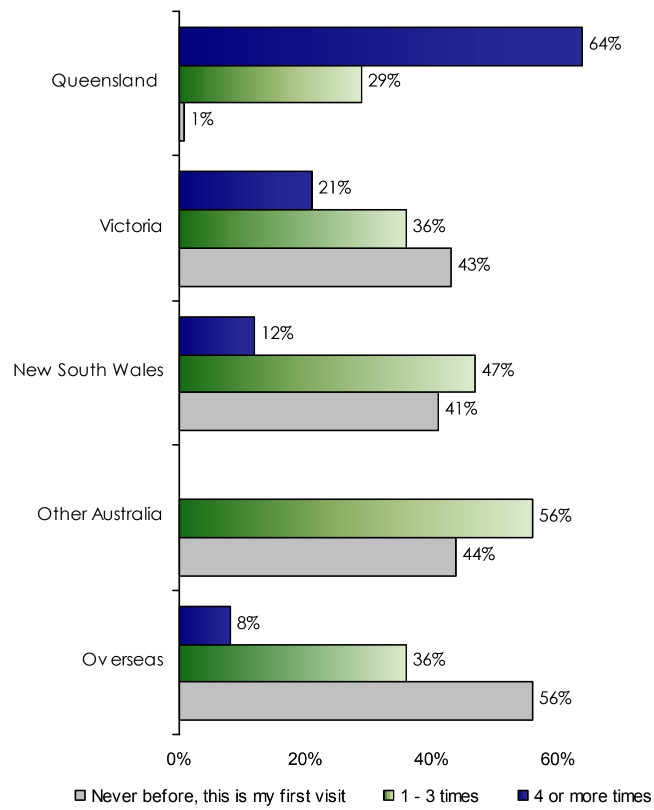
TABLE 10 – ORIGIN BY WAVE

Origin	June 2003	June 2004	June 2005
Brisbane	31%	44%	41%
Other Queensland	19%	27%	16%
Melbourne	6%	3%	7%
Other Victoria	5%	4%	8%
New South Wales	19%	10%	9%
Other Australia	10%	2%	5%
New Zealand	3%	4%	6%
Other Overseas	10%	9%	14%

Base: June 2003 (n=329); June 2004 (n=421); June 2005 (n=201)

Figure 11 shows that Queensland respondents were regular visitors to Caloundra. Respondents from other Australian states were generally visiting for the first time or had previously visited between one and three times. The majority of Overseas respondents were first time visitors to Caloundra.

FIGURE 11 – ORIGIN BY PREVIOUS VISITATION



Base: June 2005 (n=187)

MOTIVATION FOR TRIP

MOTIVATIONS

Overview

• Most respondents agreed with the statement that they were motivated to visit Caloundra to relax and rejuvenate. Another common motivation was to enjoy the peace and quiet of an uncrowded destination. These results combined with findings regarding respondent satisfaction and suggested improvements suggest respondents' desire to restrict commercial development in Caloundra.

• Eighty-seven percent of respondents stated that their greatest motivation for visiting Caloundra was fulfilled.

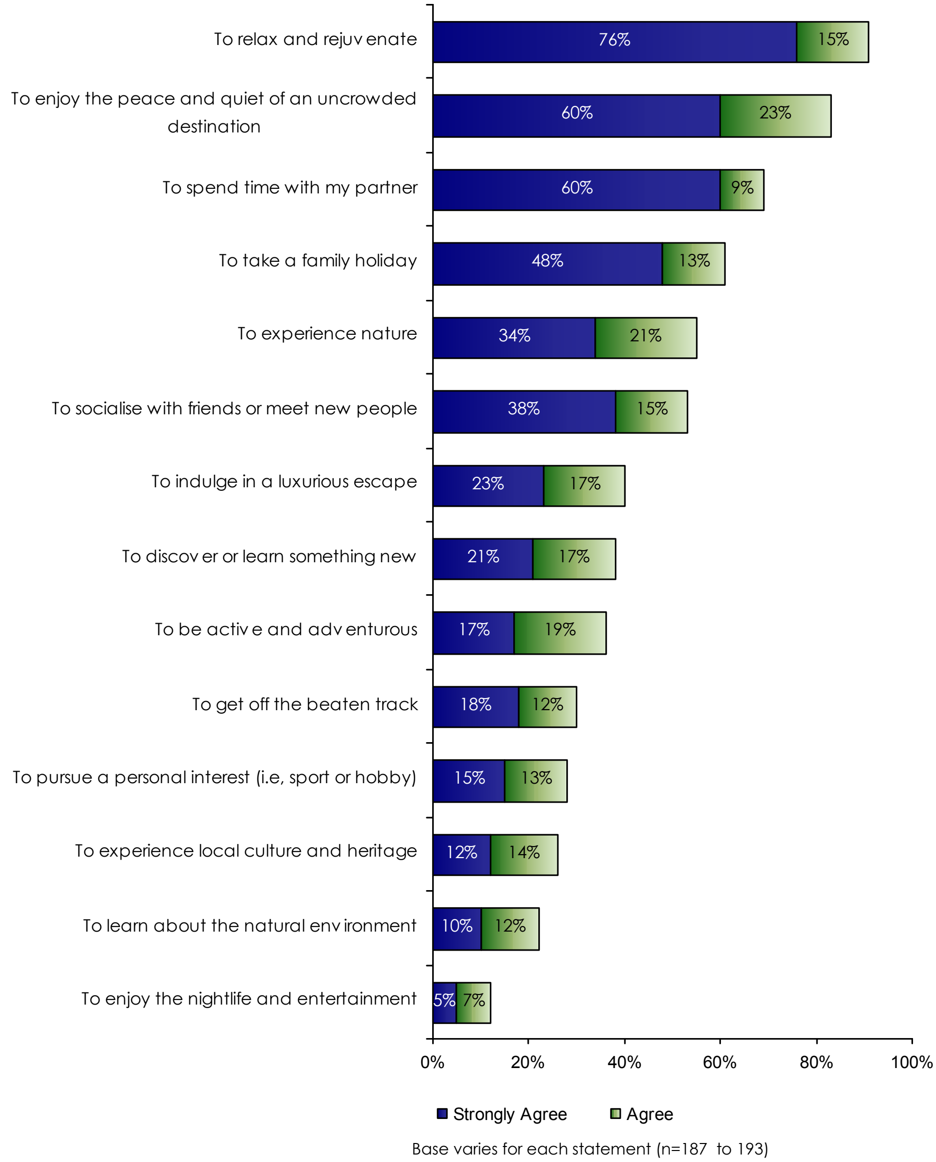
What motivated them to visit?

Respondents were asked about motivations for their trip to Caloundra. The question asked respondents to rate how strongly they agreed with statements on factors that motivated them to take their trip. Responses were measured on a five-point scale, where one equalled strongly disagree and five equalled strongly agree. Data shown in this report represents the proportion of respondents who stated they either agree or strongly agree with each statement.

The most common motivations for taking the trip to Caloundra were to relax and rejuvenate and to enjoy the peace and quiet of an uncrowded destination.

The top three motivations for taking the trip to Caloundra in June 2005 were the same as in June 2003. (This question was not asked in the June 2004 survey).

FIGURE 12 – MOTIVATIONS



Base varies for each statement (n=187 to 193)

MOTIVATIONS

What motivates them? (continued)

The most common motivations for each age and origin group are consistent with those for all respondents.

TABLE 11 – TOP 5 MOTIVATIONS BY AGE

	Under 55 years	55 years & over
To relax and rejuvenate	91%	91%
To enjoy the peace and quiet of an uncrowded destination	80%	89%
To spend time with my partner	65%	76%
To take a family holiday	58%	63%
To experience nature	51%	58%

Base varies: Under 55 years (n=100 to 101); 55 years and over(n=87 to 90).
Data represents proportion of respondents who stated they either agree or strongly agree with each statement.

TABLE 12 – TOP 5 MOTIVATIONS BY ORIGIN

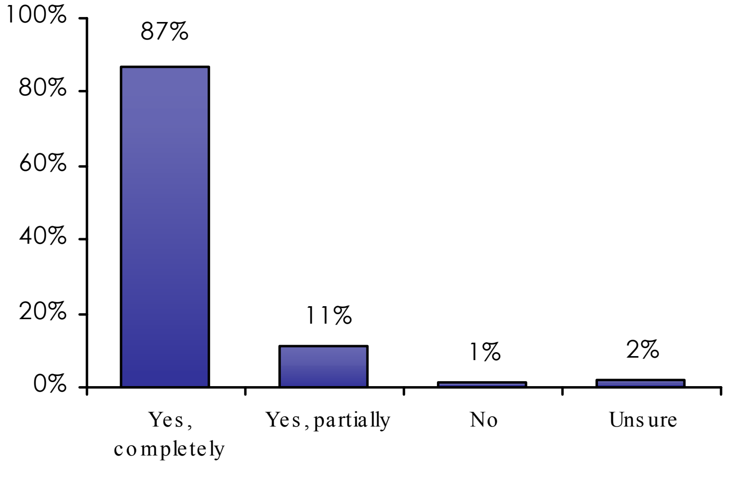
	Brisbane	Rest of Australia
To relax and rejuvenate	91%	93%
To enjoy the peace and quiet of an uncrowded destination	85%	83%
To spend time with my partner	71%	66%
To take a family holiday	64%	62%
To experience nature	58%	51%

Base: Brisbane(n=83); Rest of Aust (n=90).
Data represents proportion of respondents who stated they either agree or strongly agree with each statement.

Was their greatest motivation fulfilled?

Respondents were asked to think about their greatest motivation for taking their trip, and whether their trip to Caloundra had fulfilled that motivation. The greatest proportion of respondents stated their trip did fulfil their greatest motivation (87%) while 11% of respondents said their motivation was partially fulfilled.

FIGURE 13 – FULFILLMENT OF GREATEST MOTIVATION



Base: June 2005 (n = 196)

INFORMATION SOURCES AND ADVERTISING

INFORMATION SOURCES USED TO PLAN TRIP

Overview

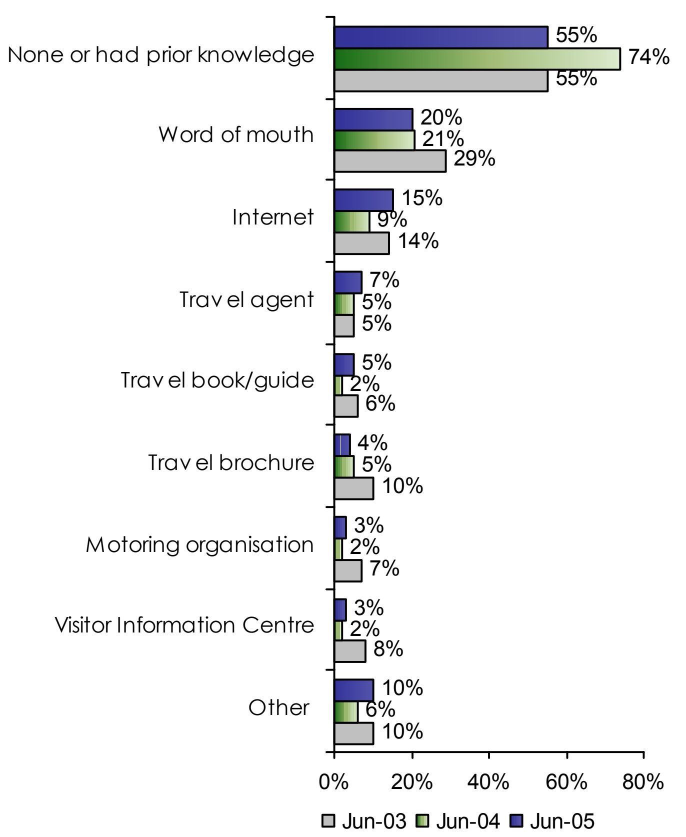
- 55% of respondents either used no information sources or had prior knowledge of Caloundra.
- Word of mouth and the internet were common information sources used.
- 69% of respondents did not recall seeing any advertising prior to their trip to Caloundra. Similar percentages occur in previous waves also.

What information sources did they use to plan their trip?

Respondents were asked about the information sources they used when planning their trip to Caloundra. The greatest proportion of respondents indicated they had prior knowledge of Caloundra or did not use any information sources (55%).

The most common information source respondents used when planning their trip to Caloundra was word of mouth, used by 20% of respondents, and 15% sourced information from the internet.

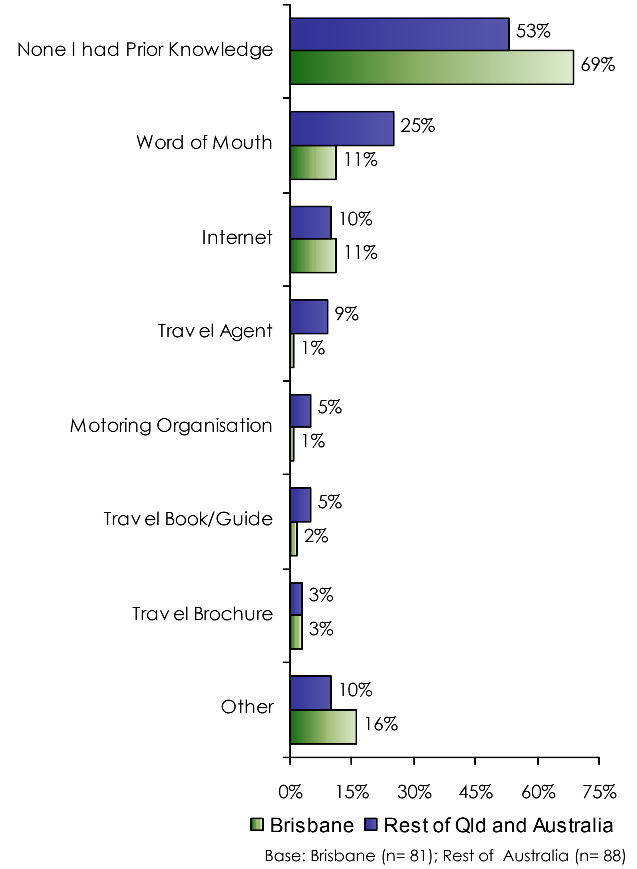
FIGURE 14 – INFORMATION SOURCES



Base: June 2003 (n=329); June 2004 (421); June 2005 (n=199).
Multiple responses accepted

The majority of Brisbane respondents had prior knowledge of the region. Australian respondents from outside Brisbane most commonly reported using prior knowledge and word of mouth when planning their trip.

FIGURE 15 – INFORMATION SOURCES BY ORIGIN



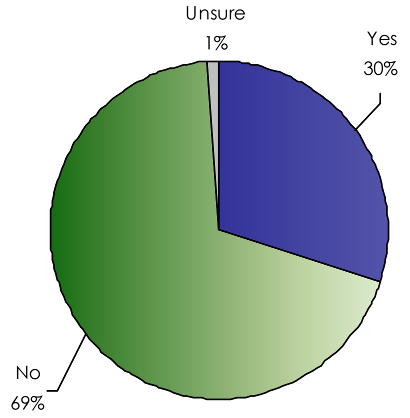
Base: Brisbane (n= 81); Rest of Australia (n= 88)
Multiple responses accepted

ADVERTISING MEDIUMS

Do they recall seeing advertising?

Respondents were asked whether they recalled seeing any advertising for the Caloundra region before leaving home. More than two thirds of respondents did not recall seeing advertising before leaving home (69%). Thirty percent (30%) of respondents did recall seeing advertising for the Caloundra region.

FIGURE 16 – ADVERTISING RECALL



Base: June 2005 (n = 200)

ADVERTISING RECALL BY ORIGIN
Brisbane
Yes = 40% No = 59% (n=82)

Rest of Australia
Yes = 23% No = 76% (n=88)

Across waves, the largest proportion of respondents consistently state that they had not seen any advertising for the Caloundra region prior to leaving home.

TABLE 13 – ADVERTISING RECALL

Advertising Recall	June 2003	June 2004	June 2005
Yes	44%	33%	30%
No	56%	65%	69%
Unsure	0%	2%	1%

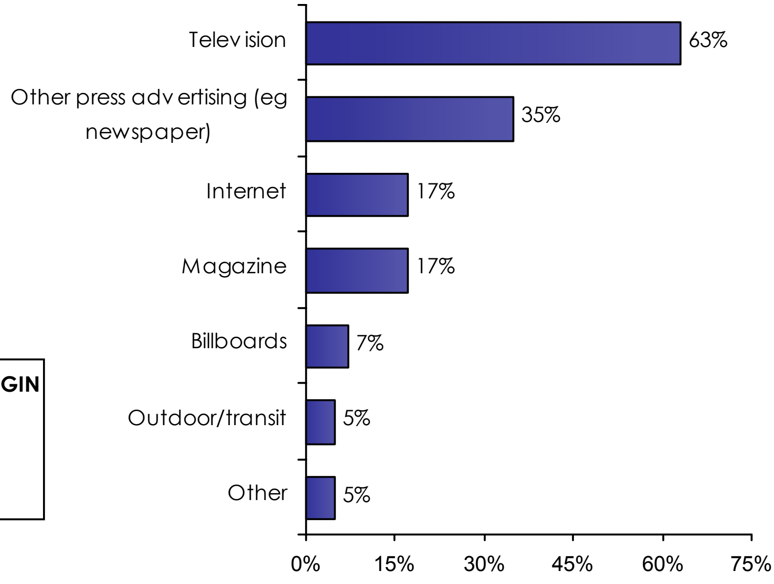
Base: June 2003 (n=329), June 2004 (n=420), June 2005 (n= 200)

Which advertising mediums do they recall?

Respondents were asked in which advertising mediums they recalled seeing advertising for the Caloundra region. Sixty-three percent of respondents who saw advertising before leaving home saw the advertising on television, and over one third recalled seeing advertising in other press advertising (35%).

For those respondents that recalled seeing advertising across the June 2005, 2004 and 2003 waves, the most common advertising medium recalled was television (63%, 54% and 61% respectively).

FIGURE 17 – ADVERTISING MEDIUMS



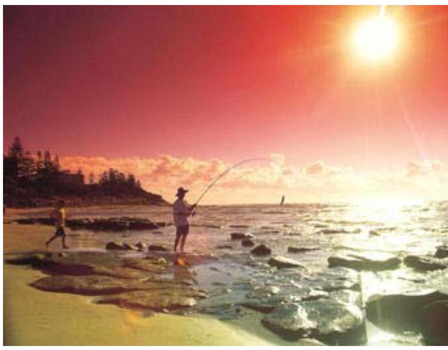
Base: respondents who saw advertising; June 2005 (n = 60)

TABLE 14 – ADVERTISING MEDIUMS

Advertising Mediums Recalled	June 2003	June 2004	June 2005
Television	61%	54%	63%
Other press advertising (e.g. newspaper)	26%	29%	35%
Magazine	16%	14%	17%
Internet	13%	14%	17%
Billboard	9%	15%	8%
Outdoor/transit	2%	0.7%	5%
Other	13%	9%	5%

Base: Respondents who saw advertising.
June 2003 (n=145); June 2004 (n=139); June 2005 (n= 60)

DETAILS OF TRIP




DETAILS OF TRIP

Overview

- 68% travelled to Caloundra via their own, a friend's or relative's vehicle.
- Three quarters (73%) were travelling for holiday or leisure purposes
- 66% were in Caloundra on an overnight stay. Of these, 26% of those stayed five to seven nights
- 49% stayed in a rented apartment or holiday flat.
- 21% booked their accommodation direct with the accommodation provider before leaving home
- The highest percentage of respondents were staying in accommodation in Caloundra (75%).
- 43% also visited Maroochydore during their trip
- 94% went to the beach and 86% went for a walk

TABLE 15 – TRANSPORTATION BY ORIGIN

Form of Transportation	Brisbane	Rest of Australia
Own/friends/relatives vehicle	89%	63%
Air Transport	0%	28%
Hire Vehicle	1%	12%
Bus/Coach	10%	9%
Railway	4%	4%
Other	0%	2%

Base: Brisbane (n= 83); Rest of Australia (n= 90)

TABLE 16 – TRANSPORTATION BY WAVE

Form of Transport	June 2003	June 2004	June 2005
Own/friends/relatives vehicle	79%	87%	68%
Air Transport	16%	13%	21%
Hire Vehicle	10%	5%	14%
Bus/Coach	5%	5%	10%
Railway	2%	1%	4%
Motor home/Campervan Towing a Caravan	6%	1%	1%
Other	1%	1%	1%

Base: June 2003 (n=329); June 2004 (n=421); June 2005 (n=202)

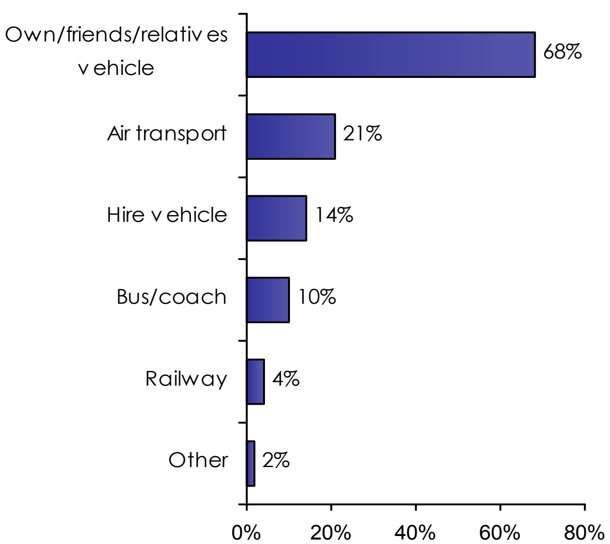
What type of transport did they use?

Respondents were asked which methods of transport they had used on their journey to Caloundra. The greatest proportion of visitors used their own, friend's or relative's vehicle to travel to Caloundra (68%). One in five respondents used air transport on their journey to Caloundra (21%), with 60% of those flying into Brisbane airport and 37% flying into the Sunshine Coast airport.

Across all waves (June 2003 to June 2005), their own, friend's or relative's vehicle was the most popular form of transport used to travel to Caloundra.

For each origin group, their own, friend's or relative's vehicle was the most popular form of transport used to travel to Caloundra.

FIGURE 18 – TRANSPORTATION

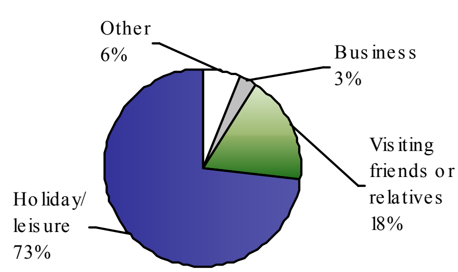


Base: June 2005 (n= 203)

Why did they visit?

Respondents were asked about the main purpose for their trip to Caloundra. By far, the greatest proportion of respondents travelled to Caloundra for holiday or leisure purposes (73%).

FIGURE 19 – MAIN PURPOSE OF VISIT



Base: June 2005 (n = 202)

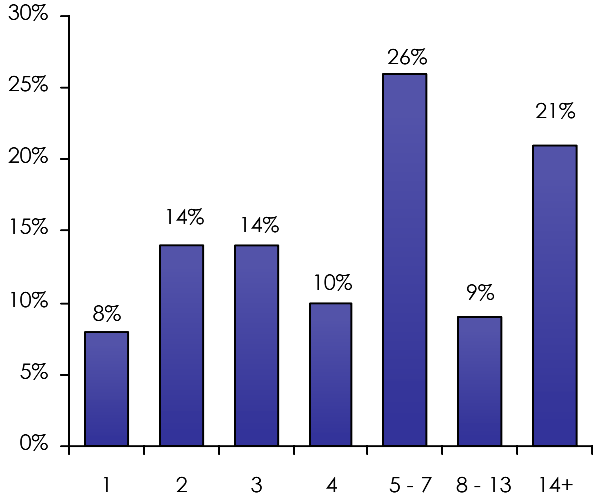
DETAILS OF TRIP

How long did they stay?

The majority of respondents stayed at least one night in Caloundra (66%), while about one third were on a daytrip (34%) .

Respondents who stayed in Caloundra for at least one night were asked how many nights they were spending in Caloundra. The length of stay was relatively long with 26% of overnight visitors staying between five and seven nights, and one in five staying for two weeks or more (21%).

FIGURE 20 – LENGTH OF STAY (NIGHTS)

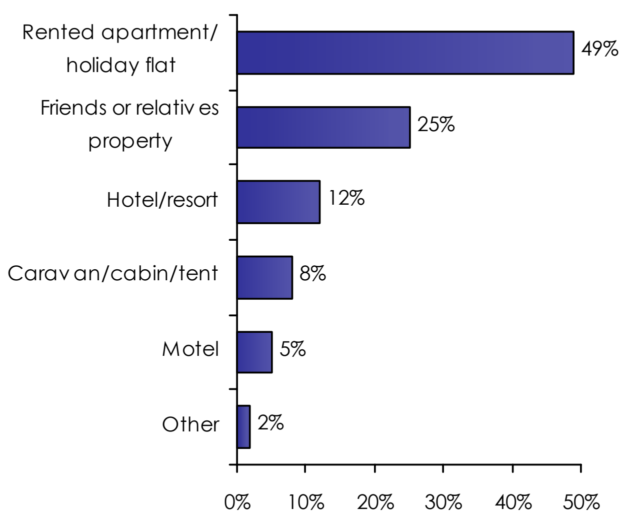


Base: Overnight respondents; June 2005 (n= 199)

What accommodation did they use?

Overnight visitors were asked about the main type of accommodation they used during their stay in Caloundra. Approximately half stayed in a rented apartment or holiday flat (49%), with a further 25% staying at a friend's or relative's property.

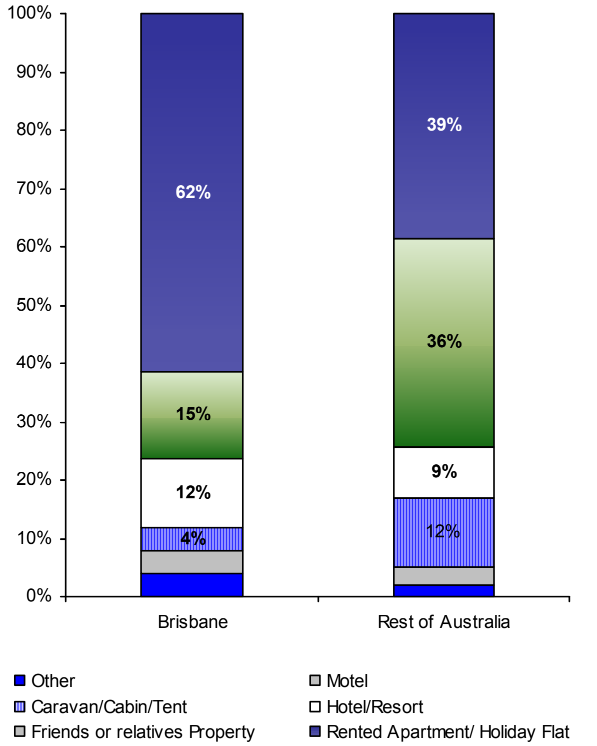
FIGURE 21 – ACCOMMODATION USED



Base: Overnight respondents to Caloundra; June 2005 (n= 134)

Figure 22 shows that the majority of respondents visiting from Brisbane stayed in a rented apartment or holiday flat. Respondents from the rest of Australia predominantly stayed with their friends or relatives or in a rented apartment or holiday flat.

FIGURE 22 – ACCOMMODATION BY ORIGIN



Base: Over night respondents Brisbane (n=52); Rest of Australia (n=59)

TABLE 17 – SATISFACTION WITH ACCOMMODATION

Accommodation Aspect	n	Total Dissatisfied	Total Satisfied
Overall	94	1%	93%
Range	92	1%	92%
Availability	91	3%	91%
Quality	94	0%	89%
Value for money	92	3%	88%
Service	84	4%	86%

Base: Varies for each statement; June 2005 (n=84 to 94)

DETAILS OF TRIP

How did they book their accommodation?

Respondents who stayed in commercial accommodation were asked how they booked their accommodation in Caloundra. The greatest proportion had booked directly with the accommodation provider before leaving home (21%), while 17% of respondents did not book their accommodation ahead of arriving in Caloundra.

TABLE 18 – ACCOMMODATION BOOKING METHOD

Accommodation Booking Method	June 2004	June 2005
Booked direct with accommodation before leaving home	33%	21%
Did not book ahead, just arrived	16%	17%
Booked direct with accommodation because I have stayed there	10%	15%
Booked through a travel agent	8%	15%
I used the internet to find and book accommodation	8%	8%
Booked through rental or real estate agent	---	4%
I used the internet to find accommodation and phoned them to	12%	4%
Work or business organised	---	4%
Friend/family booked	---	3%
Other	12%	8%

Base: June 2004 (n=111); June 2005 (n=99)
Respondents who stayed in commercial accommodation in Caloundra

TABLE 19 – ACCOMMODATION BOOKING METHOD BY ORIGIN

Accommodation Booking Method	Brisbane	Rest of Australia
Booked direct with accommodation before leaving home	26%	25%
Booked direct with accommodation because I have stayed there	19%	17%
Did not book ahead, just arrived	14%	17%
Booked through a travel agent	9%	14%
I used the internet to find and book accommodation	5%	8%
I used the internet to find accommodation and phoned to Book	2%	6%
Other	26%	14%

Base: Brisbane (n= 43); Rest of Australia (n= 36).
Top 2 responses for each origin group are highlighted.
Respondents who stayed in commercial accommodation in Caloundra

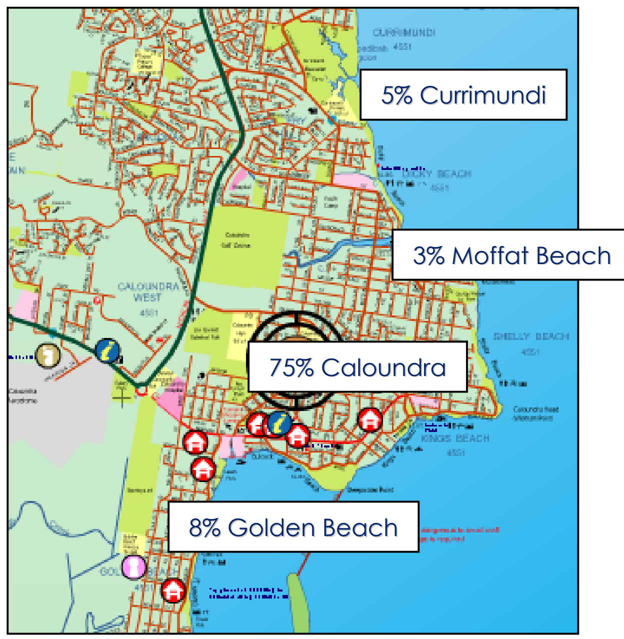
When comparing waves, results should be interpreted with caution as differences in sample size and interview location across waves may account for variation in results

Where was their accommodation located?

Respondents were asked where their accommodation was located in the Caloundra region. The greatest proportion of respondents stayed overnight in Caloundra (i.e Kings Beach, Shelly Beach, Dicky Beach and Bulcock Beach, 75%), while 8% stayed at Golden Beach. Five percent (5%) of respondents stayed in accommodation located in Currimundi, while 3% stayed at Moffat Beach.

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

FIGURE 23 – ACCOMMODATION LOCATION



Map Source: http://www.driveqld.com.au
Base: Respondents who stayed overnight in Caloundra
June 2005 (n= 131)

TABLE 20 – ACCOMMODATION LOCATION

Accommodation Location	June 2003	June 2004	June 2005
Caloundra (i.e. Kings Beach, Shelly Beach, Dicky Beach, Bulcock Beach)	59%	59%	75%
Golden Beach	14%	12%	8%
Currimundi	3%	2%	5%
Moffat Beach	2%	10%	3%
Kawana	2%	2%	2%
Beerwah/Landsborough	3%	4%	2%
Maleny/Witta	14%	8%	1%
Other	3%	4%	3%

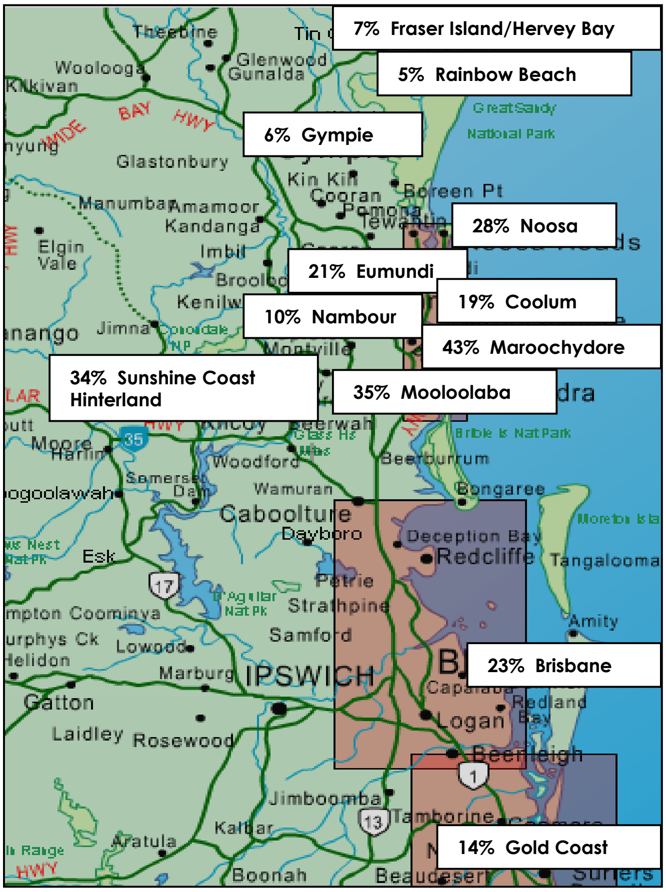
Base: June 2003 (n=183); June 2004 (n=162); June 2005 (n=131)
Top 3 responses for each wave are highlighted
Base: Respondents who stayed overnight in Caloundra

DETAILS OF TRIP

Where else did they go?

Respondents were asked which of a number of places they had visited or planned to visit on their current trip (apart from passing through). Forty-three percent (43%) of respondents indicated that they had visited or planned to visit Maroochydore, while 35% visited or planned to visit Mooloolaba. One third of respondents indicated that they had visited or planned to visit the Sunshine Coast Hinterland (34%).

FIGURE 24 – PLACES VISITED ON CURRENT TRIP



Base: June 2005 (n=203). Multiple responses accepted

TABLE 21 – PLACES VISITED BY AGE

Places Visited	Under 55 years	55 years & over
Maroochydore	37%	51%
Sunshine Coast Hinterland	27%	41%
Mooloolaba	33%	37%
Noosa	27%	28%
Eumundi	18%	26%
Coolum	18%	22%
Brisbane	25%	20%
Gold Coast	14%	15%
Nambour	8%	14%
Gympie	4%	9%
Fraser Island/Hervey Bay	9%	5%
Rainbow Beach	8%	1%

Base: Under 55 years (n=106), 55 years & over (n=93). Multiple responses accepted.

TABLE 22 – PLACES VISITED BY ORIGIN

Places Visited	Brisbane	Rest of Australia
Maroochydore	22%	53%
Mooloolaba	23%	39%
Sunshine Coast Hinterland	34%	31%
Noosa	13%	34%
Eumundi	12%	28%
Coolum	13%	23%
Brisbane	13%	22%
Gold Coast	8%	13%
Nambour	7%	13%
Fraser Island/Hervey Bay	5%	8%
Gympie	5%	6%
Rainbow Beach	2%	4%

Base: Brisbane (n=83); Rest of Aust (n=90). Multiple responses accepted.

Visitation by wave illustrates that Maroochydore and Mooloolaba are popular places visited by respondents during their trip.

It should be noted that the June 2003 and 2004 waves had a large proportion of surveys conducted in Hinterland locations (see methodology for more information).

TABLE 23 – PLACES VISITED

Places Visited	June 2003	June 2004	June 2005
Maroochydore	50%	36%	43%
Mooloolaba	53%	34%	35%
Sunshine Coast Hinterland	73%	63%	34%
Noosa	46%	24%	28%
Brisbane	30%	20%	23%
Eumundi	39%	22%	21%
Coolum	26%	17%	19%
Gold Coast	21%	15%	14%
Nambour	24%	18%	10%
Fraser Island/Hervey Bay	16%	8%	7%
Gympie	15%	9%	6%
Rainbow Beach	15%	7%	5%
Other	N/a	N/a	3%

Base: June 2003 (n=323); June 2004 (n=421); June 2005 (n=203). Multiple responses accepted. The highest response for each wave is highlighted.

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

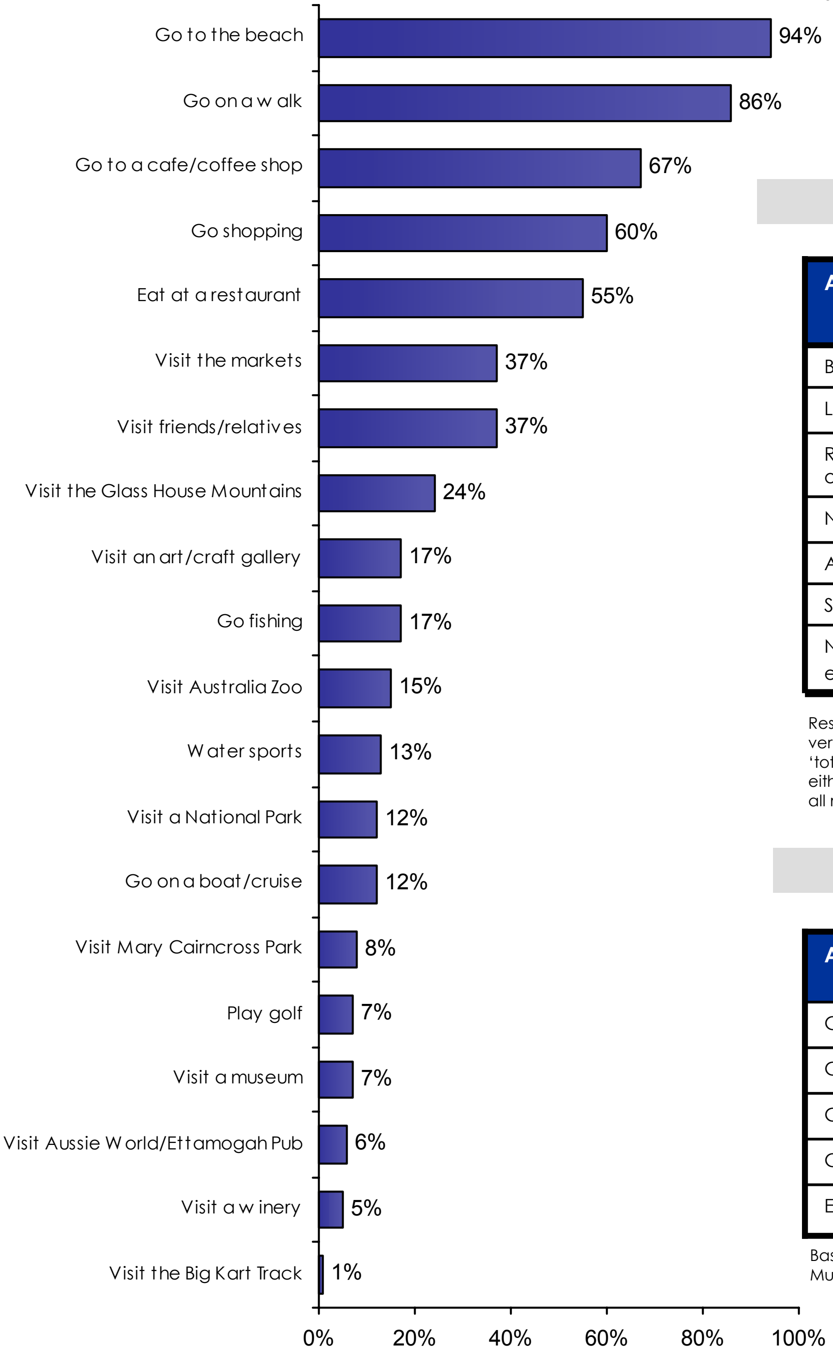
DETAILS OF TRIP

What activities did they do?

Respondents were asked what activities they had participated in (or planned to participate in) during their stay in Caloundra. The most popular activity was going to the beach (94%). In addition, a large proportion of respondents went on a walk (86%), went to a café or coffee shop (67%) and went shopping (60%).

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

FIGURE 25 – ACTIVITIES



Base: June 2005 (n=203). Multiple responses accepted

TABLE 24 – TOP 5 ACTIVITIES BY ORIGIN

Activities	Brisbane	Rest of Australia
Go to the Beach	94%	94%
Go on a Walk	87%	86%
Go to a café/coffee shop	64%	68%
Go shopping	47%	67%
Eat at a restaurant	52%	54%

Base: Brisbane (n=83); Rest of Aust (n=90)
Multiple responses accepted

Two-thirds of respondents originating from areas outside of Brisbane listed shopping as an activity done whilst in Caloundra

TABLE 25 – SATISFACTION WITH ACTIVITIES

Aspect	n	Total Dissatisfied	Total Satisfied
Beaches	198	0%	95%
Lots to see and do	184	1%	91%
Restaurants/cafes - overall	142	1%	89%
National Parks	52	6%	87%
Attractions - overall	83	1%	82%
Shopping - overall	131	2%	82%
Nightlife, entertainment	36	22%	53%

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

TABLE 26 – TOP 5 ACTIVITIES BY AGE

Activities	Under 55 years	55 years & over
Go to the Beach	95%	94%
Go on a Walk	80%	92%
Go to a café/coffee shop	68%	69%
Go shopping	56%	65%
Eat at a restaurant	50%	61%

Base: Under 55 years (n=106); 55 years and over (n= 93).
Multiple responses accepted

DETAILS OF TRIP

What activities did they do? (continued)

Results indicate an increasing trend in the proportion of respondents who went on a walk during their visit to Caloundra since June 2003.

Please note that differences between waves may be due to variation in interviewing locations. For example, many of the regions' art and craft galleries are located in the Hinterland, and the apparent decline in visitation to these attractions may be due to the removal of Hinterland interview locations in the June 2005 wave of the research. A similar finding may also hold true for visitation to Mary Cairncross Park and the regions' wineries.

A breakdown of the number of interviews conducted in each location is provided in the methodology section of this report.

TABLE 27 – ACTIVITIES PARTICIPATED IN

Activity	June 2003	June 2004	June 2005
Go to the Beach	N/A	52%	94%
Go on a walk	69%	75%	86%
Go to a cafe/coffee shop	71%	64%	67%
Go shopping	64%	53%	60%
Eat at a restaurant	56%	39%	55%
Visit friends/relatives	38%	46%	37%
Visit the markets	42%	39%	37%
Visit the Glass House Mountains	30%	21%	24%
Go fishing	14%	9%	17%
Visit an art/craft gallery	34%	27%	17%
Visit Australia Zoo	18%	13%	15%
Go on a boat/cruise	12%	9%	12%
Visit a National Park	21%	15%	12%
Visit Mary Cairncross Park	39%	44%	8%
Visit a museum	15%	7%	7%
Play golf	5%	4%	7%
Visit Aussie World/Ettamogah Pub	12%	9%	6%
Visit a winery	18%	10%	5%
Visit the Big Kart Track	3%	3%	1%

Base: June 2003 (n=329); June 2004 (n=421); June 2005 (n=203). Multiple responses accepted

The apparent increase in the number of respondents going on a walk may be due to new walkway infrastructure

SATISFACTION AND IMPROVEMENTS

SATISFACTION AND IMPROVEMENTS

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

TABLE 28 – SATISFACTION WITH ASPECTS OF CALOUNDRA – JUNE 2005

Aspect	N	Total Dissatisfied	Neutral	Total Satisfied
Caloundra overall	**197**	**1%**	**9%**	**90%**
Beaches	198	0%	5%	95%
Friendliness of locals	184	1%	4%	95%
Personal safety/security	197	1%	7%	93%
Accommodation - overall	94	1%	6%	93%
Accommodation - range	92	1%	7%	92%
Weather during your visit	197	1%	8%	91%
Lots to see and do	184	1%	8%	91%
Accommodation - availability	91	3%	5%	91%
Availability of tourist information	128	1%	9%	91%
Accommodation - quality	94	0%	11%	89%
Restaurants/cafes - overall	142	1%	11%	89%
Attractions - service	78	1%	10%	88%
Accommodation - value for money	92	3%	9%	88%
Restaurants/cafes - service	145	1%	12%	87%
Access/transport to the region	182	5%	8%	87%
National Parks	52	6%	8%	87%
Restaurants/cafes - range	150	1%	13%	86%
Accommodation - service	84	4%	11%	86%
Attractions - range	101	3%	12%	85%
Shopping - service	130	2%	14%	84%
Availability of tours	55	2%	15%	84%
Restaurants/cafes - value for money	144	1%	16%	83%
Signage	181	4%	13%	83%
Restaurants/cafes - atmosphere	145	2%	16%	82%
Restaurants/cafes - quality of food	144	1%	17%	82%
Attractions - overall	83	1%	17%	82%
Shopping - overall	131	2%	17%	82%
Attractions - quality	81	5%	15%	80%
Attractions - value for money	82	2%	18%	79%
Shopping - quality of goods	131	2%	20%	79%
Car park facilities	158	4%	17%	78%
Shopping - value for money	130	1%	21%	78%
Caloundra CBD Streetscape	180	4%	18%	78%
Availability of public transport	52	8%	15%	77%
Restaurants/cafes - opening hours	140	6%	19%	76%
Shopping - range	133	2%	23%	75%
Current level of development	187	19%	15%	66%
Nightlife/entertainment	36	22%	25%	53%

Beaches and the friendliness of the locals received the highest satisfaction ratings

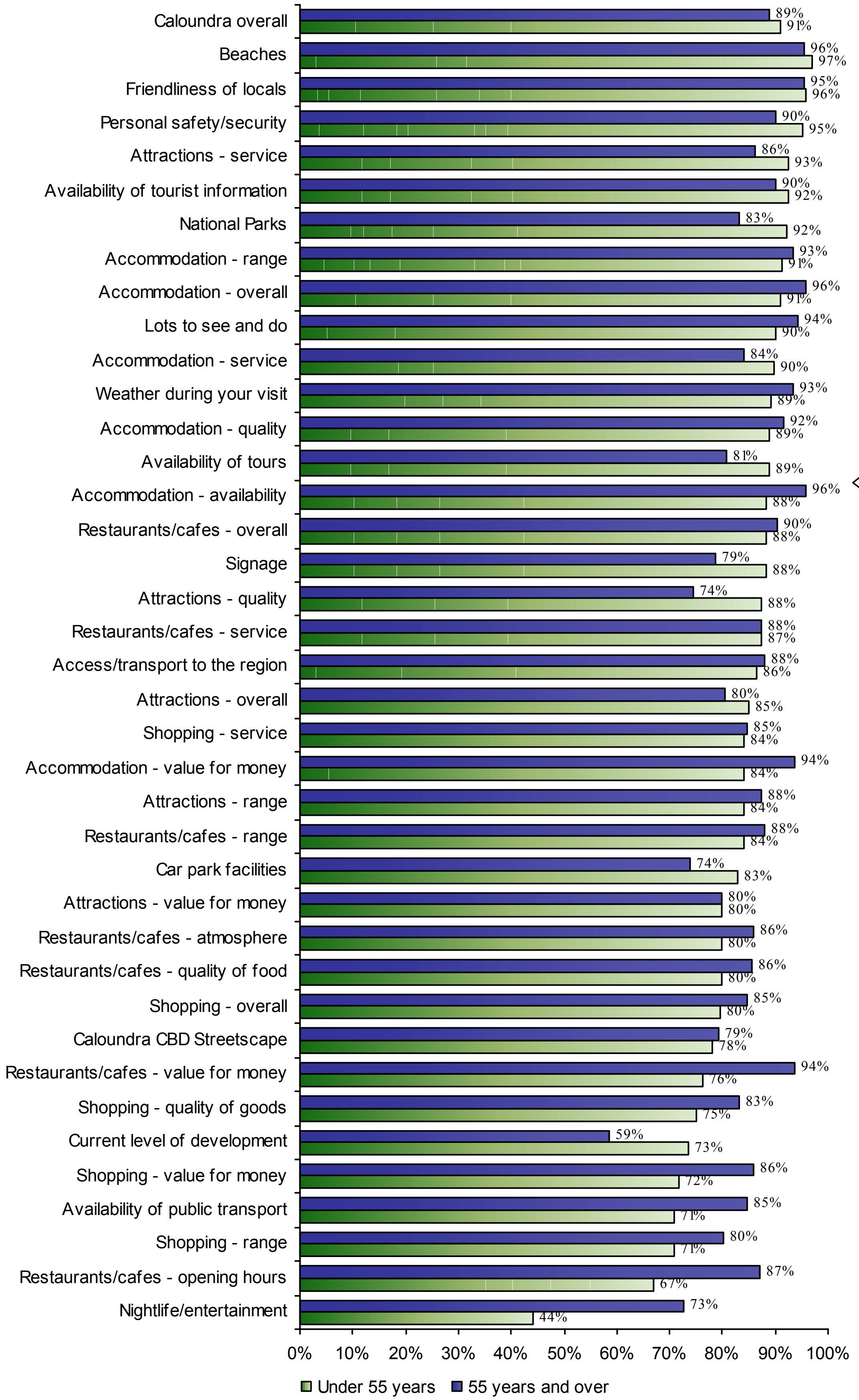
There is a high satisfaction with accommodation in Caloundra

The highest dissatisfaction ratings received were for the current level of development and nightlife/entertainment in Caloundra

SATISFACTION AND IMPROVEMENTS

Total satisfaction by age group is presented in Figure 26. Respondents in both age groups gave highest satisfaction ratings for the beaches in Caloundra. Percentages shown comprise all respondents that rated each aspect either 4 (satisfied) or 5 (very satisfied) on the satisfaction scale.

FIGURE 26 – TOTAL SATISFIED BY AGE – JUNE 2005



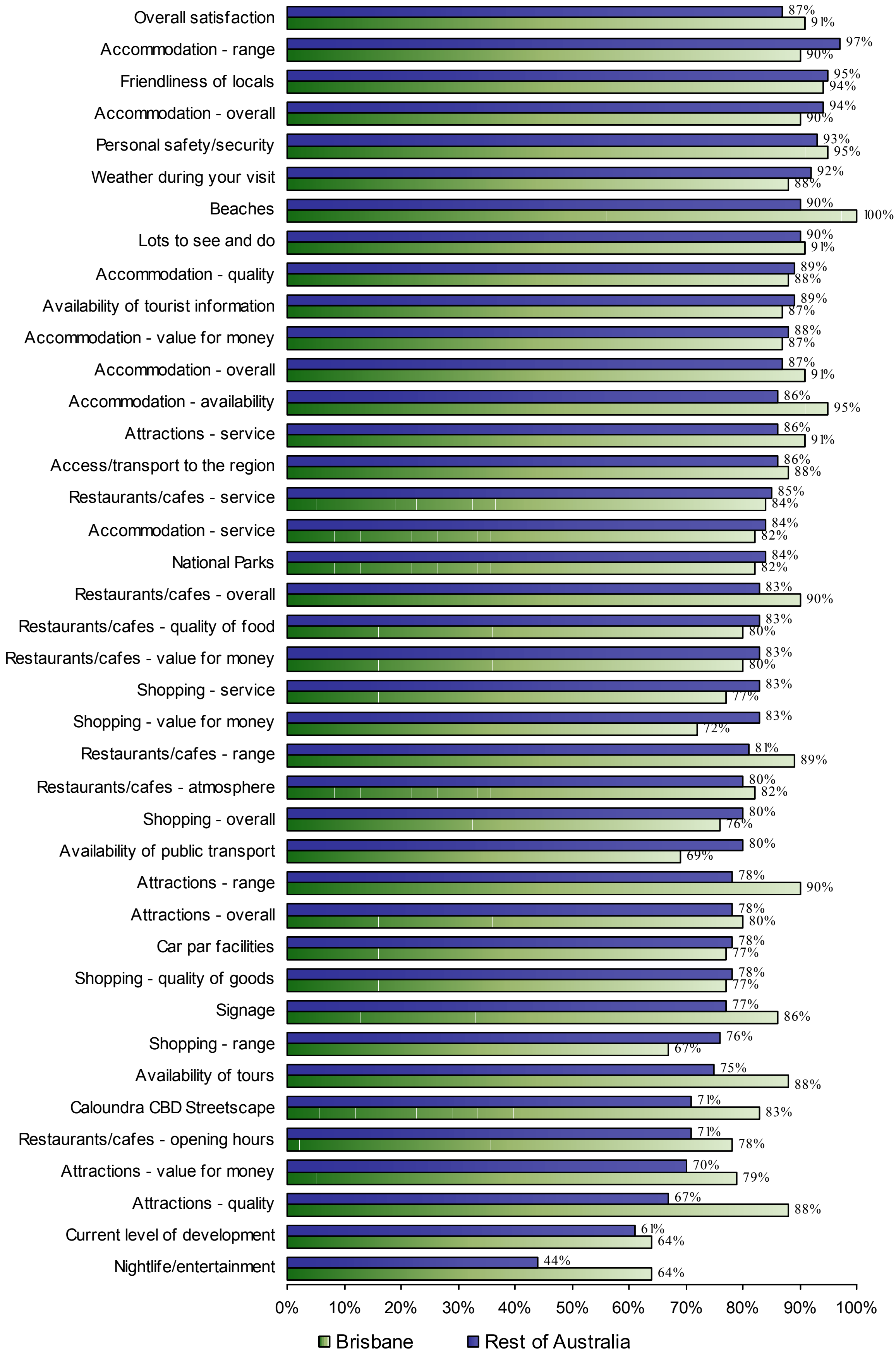
For respondents aged 55 years and older, accommodation rated equal highest with satisfaction for beaches

Base varies: Under 55 years (n=24 to 105); 55 years and over (n=11 to 91)

SATISFACTION AND IMPROVEMENTS

Total satisfaction by origin is presented in Figure 27. Percentages shown comprise all respondents that rated each aspect either four (satisfied) or 5 (very satisfied) on the satisfaction scale.

FIGURE 27 – TOTAL SATISFIED BY ORIGIN – JUNE 2005



Base varies: Brisbane (n=11 to 83); Rest of Australia(n = 16 to 87)

SATISFACTION AND IMPROVEMENTS

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

TABLE 29 – TOTAL SATISFIED BY WAVE

Aspects of Caloundra	June 2003		June 2004		June 2005	
	N	%	N	%	N	%
Caloundra overall	**316**	**96%**	**400**	**94%**	**197**	**90%**
Beaches	245	94%	346	94%	198	95%
Friendliness of locals	309	95%	382	93%	184	95%
Personal safety/security	317	94%	395	88%	197	93%
Accommodation - overall	160	84%	96	88%	94	93%
Accommodation - range	-	-	94	96%	92	92%
Weather during your visit	-	-	-	-	197	91%
Lots to see and do	296	91%	392	87%	184	91%
Accommodation - availability	-	-	97	89%	91	91%
Availability of tourist information	241	87%	241	80%	128	91%
Accommodation - quality	-	-	98	81%	94	89%
Restaurants/cafes - overall	253	87%	289	83%	142	89%
Attractions - service	-	-	184	81%	78	88%
Accommodation - value for money	-	-	96	88%	92	88%
Restaurants/cafes - service	-	-	285	84%	145	87%
Access/transport to the region	266	83%	333	76%	182	87%
National Parks	-	-	220	88%	52	87%
Restaurants/cafes - range	-	-	287	83%	150	86%
Accommodation - service	-	-	87	85%	84	86%
Attractions - range	-	-	199	79%	101	85%
Shopping - service	-	-	239	78%	130	84%
Availability of tours	93	89%	83	86%	55	84%
Restaurants/cafes - value for money	-	-	287	76%	144	83%
Signage	306	73%	388	73%	181	83%
Restaurants/cafes - atmosphere	-	-	290	84%	145	82%
Restaurants/cafes - quality of food	-	-	288	84%	144	82%
Attractions - overall	-	-	187	85%	83	82%
Shopping - overall	238	76%	239	76%	131	82%
Attractions - quality	-	-	189	83%	81	80%
Attractions - value for money	-	-	188	70%	82	79%
Shopping - quality of goods	-	-	236	77%	131	79%
Car park facilities	294	72%	386	71%	158	78%
Shopping - value for money	-	-	234	71%	130	78%
Caloundra CBD Streetscape	-	-	311	69%	180	78%
Availability of public transport	79	72%	103	33%	52	77%
Restaurants/cafes - opening hours	-	-	-	-	140	76%
Shopping - range	-	-	248	72%	133	75%
Current level of development	-	-	-	-	187	66%
Nightlife/entertainment	84	56%	80	55%	36	53%

The beaches and friendliness of the locals have received consistently high satisfaction ratings

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

SATISFACTION AND IMPROVEMENTS

What improvements did they suggest?

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

The most common suggestion was to restrict development in Caloundra (13%). Six percent of respondents stated they would like to see improved or more public facilities, amenities or parks, while a further 5% suggested that Caloundra needed improved or more signage.

Restricting development in Caloundra and improving or providing more public facilities, amenities and parks have featured in respondents' top three suggested improvements since the June 2003 wave of the Caloundra Visitor Survey.

TABLE 30 – POSSIBLE IMPROVEMENTS

Improvements	June 2003	June 2004	June 2005
Restrict development (e.g. no more high-rises)	10%	6%	13%
Improved/more public facilities/amenities/parks	8%	9%	6%
Improved/more signage	6%	6%	5%
Improved/more restaurants/ cafes (incl. extended opening hours)	n/a	3%	4%
Improved/more parking	4%	10%	4%
Improved/more public transport	3%	8%	3%
Less crowding/touristy/commercial/not like Gold Coast	4%	3%	3%
More entertainment /activities/attractions (including extended opening hours)	n/a	8%	2%
Modernise CBD/streetscape	n/a	n/a	2%
Improved/more Shops (incl. extended opening hours)	n/a	5%	2%
More Tourist Information	3%	4%	1%
Maintenance/cleanliness of town/public areas	4%	2.4%	2%
Improve traffic flow / roads	5%	7%	1%
Other	8%	13%	16%

Base all respondents: June 2003 (n=329); June 2004 (n=421); June 2005 (n=203).
Multiple responses accepted. Most common response in each wave highlighted
'Other' consists of a range of responses, each mentioned by fewer than 3% of respondents – see Appendix A for full listing.

Do they intend to return?

Respondents were asked whether they would consider returning to Caloundra within the next three years for a holiday. The greatest proportion of respondents intend to return to Caloundra for a holiday (79%), with a further 12% unsure about whether they will return. Nine percent (9%) of respondents said they did not intend to return to Caloundra for a holiday within the next three years.

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

APPENDIX A – POSSIBLE IMPROVEMENTS "OTHER" RESPONSES

The following possible improvements for Caloundra were mentioned by less than 3% of the respondents in the June 2005 wave of the Caloundra Visitor Survey.

Possible Improvements	N
Attention to native vegetation and character, incorporate more natural environment, emphasis on environment and outdoor planning - landscape architecture - local environment and natives	2
Caravan parks (more various different facilities)	2
Cheaper Property	2
Better Accommodation service/facilities. Lower prices	2
You seem to have to travel to everything like Aussie Zoo	1
Try to develop a more vibrant life centre in evenings	1
Some of the younger locals are obnoxious	1
More dogs off leash areas during day time	1
More art galleries	1
Dogs on benches not appreciated	1
Keep it for young families	1
"By the sea" can mean at least 2-3 streets off the front beach	1
Flatten the hills out	1
Get more people in - the place is empty	1
Hospitals,	1
Jetty at Kings Beach for fishing	1
Meter Maids 30 years ago	1
More accessible shire office - get moved around office when have complaint	1
More post boxes	1
More Pubs and Cheaper Beer	1
Removal of fencing which spoils views (Golden Beach area)	1
Wine Bar on Bulcock beach	1
Area for kids to play	1

APPENDIX B – DETAILED BRISBANE RESPONDENT ORIGIN

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 West to Woody Point in the South East.

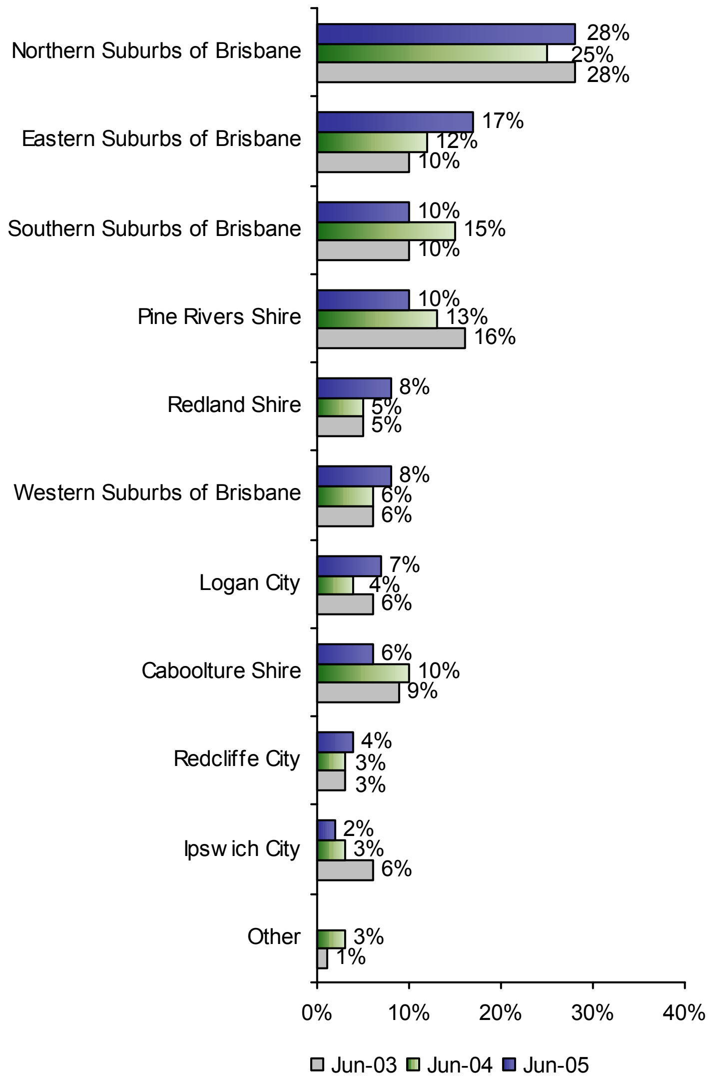
Information pertaining to shire/city boundaries was obtained via each respective council website. Shire/city divisions current as at March 2005.

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

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

Other/Location Unknown refers to regions of Brisbane which are included in the Regional Tourist Organisation (RTO) definition of Brisbane, but are not included in the Australian Bureau of Statistics (ABS) definition of Brisbane. This category also includes visitors who specified '4001' as their postcode, rather than providing their exact suburb postcode.

FIGURE 28 – RESPONDENT ORIGIN IN BRISBANE



Base: All respondents from Brisbane;
June 2003 (n=100); June 2004 (n=181); June 2005 (n=83)

DATA SOURCES

National and International Visitor Surveys (NVS/IVS)

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

Survey of Tourist Accommodation (STA)

The Survey of Tourist Accommodation is a quarterly survey of all establishments providing predominantly short-term accommodation (i.e. for less than two months) to the general public. It is conducted by the Australian Bureau of Statistics. From January 1998 the survey includes establishments with 15 or more rooms and provides information relating to the following categories:

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

Uses the ABS/TRA regions.

Visitor Expenditure & Economic Contribution

Tourism Queensland, in conjunction with the Department of State Development and the Office of Economic and Statistical Research (a division of Queensland Treasury), have recently been involved in a project aimed at quantifying the economic contribution of tourism to Queensland. The first stage of this research was to determine the level of international and domestic visitor expenditure in Queensland from 1985 to 1999, at both a state and regional level. The second stage of this research was to determine the contribution of this expenditure to the Queensland economy in terms of Gross Regional Product and Gross State Product for the 1998-1999 financial year.

Various data sources were utilised for this project including the International and National Visitor Surveys (TRA), the National Tourism Satellite Account (ABS), the Survey of Tourist Accommodation (ABS) and Queensland Input-Output Tables (Office of the Government Statistician). A more detailed explanation of the methodology can be obtained by referring to the individual reports (www.statistics.qld.gov.au). Updated expenditure and economic contribution figures are expected to be released in late 2004.

Roy Morgan Research Holiday Tracking Survey (HTS)

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

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

FURTHER INFORMATION

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