Minjerribah Futures

Minjerribah Visitor Research Program

Round 3 Report

November 2021

The University of Queensland Australia

Queensland Government

Acknowledgements

Acknowledgement of Country

We acknowledge the Quandamooka People as the Traditional Owners of Minjerribah, and their connection to land and community. We pay our respects to all Traditional Owners, and to the Elders both past and present.

Minjerribah Futures

The Minjerribah Visitor Research Program is one of 25 projects being delivered under the Queensland Government's *Minjerribah Futures* initiative. *Minjerribah Futures* is coordinated by the Department of Tourism, Innovation and Sport (DTIS). *Minjerribah Futures* continues the work commenced by the *North Stradbroke Island Economic Transition Strategy (ETS)*.

Stakeholder Reference Group

The project team would like to acknowledge the assistance of members of the Stakeholder Reference Group consisting of:

- Department of Tourism, Innovation and Sport (DTIS)
- Tourism and Events Queensland (TEQ)
- Brisbane Marketing
- Redland City Council
- Quandamooka Yoolooburrabee Aboriginal Corporation (QYAC)
- Straddie Chamber of Commerce (SCoC)

Other Acknowledgements

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- Discover Stradbroke
- The University of Queensland Moreton Bay Research Station

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Other Reports

- North Stradbroke Island Visitor Research Program, Round 1 Report (March 2018).
- North Stradbroke Island Visitor Research Program, Round 2 Report (June 2019).

Executive Summary

Background

Minjerribah, or North Stradbroke Island (NSI) as the island was named by European settlers, is the world's second-largest sand island. Tourism is the island's largest employer, with 20 per cent of the island's workforce employed in accommodation and food services. However, future tourism opportunities have been constrained by mining activity. The Queensland Government has phased out sand mining on Minjerribah and has implemented strategies to expand the island's existing industries to ensure a strong, sustainable economy for the future. The **NSI Economic Transition Strategy (ETS)** was released in 2016 to deliver this commitment. The **Minjerribah Futures** program was established to continue the implementation of the ETS.

The six-year **Minjerribah Visitor Research Program** is one of 25 projects being delivered under the Minjerribah Futures initiative. The **purpose** of the Minjerribah Visitor Research Program is to collect data from a range of sources to better understand the visitor market and its needs. The program provides insights into market awareness, travel intentions, transport and activity preferences, visitor behaviour, and spending patterns for major market segments.

Methodology

The project methodology draws on **five data sources,** including the NSI Visitor Survey of current visitors; an Online Survey Panel of potential visitors and non-visitors; focus groups with visitors and non-visitors; TripAdvisor reviews for accommodation, restaurants and activities on the island; and secondary data and information. The project is organised into three reporting rounds between 2017 and 2021. This report is the third and final in the series and summarises the key findings from the third round of data collection, which took place between October 2020 and October 2021.

Key Findings

The findings are organised around six major sections that answer key questions about current and potential visitors and their needs:

1. **Market Profile:** Who are the visitors? What motives drive visitation to Minjerribah? What are the reasons for not visiting? How much do visitors spend?
2. **Market Origin:** Where do visitors come from?
3. **Seasonality:** When do visitors come to the island?
4. **Destination Awareness:** How much do current and potential visitors know about Minjerribah? How do current and potential visitors perceive the destination? What are the key destination attributes? How is the destination positioned relative to competitors? How aware are visitors of advertising? What information sources do visitors use?
5. **The Visitor Experience**: Why do visitors come to Minjerribah? What experiences are current and potential visitors seeking? What aspects of the experience can be improved?

Market Profile

The market profile provides insights into visitor numbers, demographics, trip characteristics, visitor motives, reasons for not visiting and visitor spending. Key findings:

- Passenger ferry (water taxi) patronage **increased by 10.7% in 2019**, but **declined by 34.1% in 2020** due to COVID-19 travel restrictions.
- Total visitation for **2019** was estimated to be between **390,000 to 450,000** visitors, based on ferry patronage, occupancy data and responses to the NSI Visitor Survey.
- Total visitation for **2020** was estimated to be between **220,000 to 270,000** visitors, based on ferry patronage, occupancy data and responses to the NSI Visitor Survey.
- Visitation is likely to return rapidly to pre COVID-19 levels in 2022.
- 43.7% of visitors in 2020/2021 were aged between 36 and 55, with a **median age of 41**.
- The island is a popular **family destination** with almost 41% of visitors being "full nesters". A majority of these were families with primary and secondary school-aged children.
- Only 4.9% of visitors identified as **Aboriginal or Torres Strait Islanders**.
- The Online Survey Panel profile of potential visitors indicates a more diverse demographic mix of visitors could be attracted to the island.
- The socio-demographic profile of current visitors is indicative of single income vs dual income households, with the most common **household income** categories being $50,001 to $110,000 (32.8%) and above $200,000 (12.8%). Most current visitors were **employed full-time**. The current market has limited discretionary time.
- The majority of visitors (80.5%) indicated that a **holiday** was the primary reason for visiting the island. The results indicate a relatively high rate (70.0%) of **repeat visitation**, but the 2020/2021 data included a significantly higher percentage of first-time visitors.
- 37.7% of visitors indicated that they were travelling with **children or extended family** and the average **travel party size** was three visitors.
- **Day trippers** made up 38.3% of visitors to the island (an increase of 5.0%).
- The mean **length of stay** for overnight visitors was 3.4 nights - lower than the mean length of stay recorded in previous survey rounds.
- The island excels at providing experiences that appeal to escape and relaxation **motives**. Learning about aboriginal culture, learning about the island, and experiencing new things are moderately important but are under-performing.
- **Reasons for not visiting** the island include the COVID-19 pandemic, cost, accessibility and lack of interest or awareness. The qualitative results highlight that there are some incorrect perceptions about accessibility, which could be addressed through marketing and provision of visitor information.
- **Visitor spending**: The median spend per day was $120 (no change from round 2) for day trippers and $171 (↑$1) for overnight visitors. Accommodation accounted for the highest expenditure category. Families spend considerably more than other visitors on accommodation and food. Day trippers are likely to spend more per day than overnight visitors in all spending categories.

Market Origin

As a result of the COVID-19 pandemic, the majority of visitors in 2020/2021were domestic (98.0%). Key findings include:

- Due to border restrictions, 97.5% of all current visitors who provided their postcode came from Queensland.
- A considerable proportion (74.1%) of **domestic visitors** came from within a 50km radius of Dunwich and the top postcodes were concentrated in Brisbane and Redland City.
- The geographic analysis highlights significant opportunities to attract domestic visitors from further afield. 3.7 million Australians live within 200km of the island.
- International responses came mainly from foreign workers and students who remained in Australia during the pandemic.

Seasonality

Seasonality indicators include ferry patronage, accommodation occupancy, Google Trends data and responses from repeat visitors on the NSI Visitor Survey. Key findings include:

- Average 2020/2021 **occupancy rates** ranged from 52.4% in May 2021 to 75.5% in December 2020. The supply of holiday rental accommodation varied considerably during this period as owners were more likely to use their own properties, significantly reducing the supply of holiday rental nights.
- The current market continues to be highly sensitive to Easter, spring and summer school holiday periods. Peak periods occur in March or April (depending on the timing of Easter), late September/early October and late December/early January.
- Economic benefits can be enhanced by increasing visitation in off-peak periods, particularly in February, May and June when occupancy rates are below average.
- *Google Trends* data shows that the seasonal patterns identified for Minjerribah are also evident in search activity for other Southern Queensland island destinations.

Destination Awareness

The analysis of destination awareness focusses on destination familiarity, sentiment, attributes, positioning, advertising awareness, and information sources.

Destination Familiarity

- Only 7.6% of online panellists indicated that they had never heard of North Stradbroke Island (Minjerribah), indicating a high level of general awareness.
- Familiarity with the destination was higher in Queensland and declined for potential visitors from other states.
- Market awareness of key destination attributes is low. While there is some awareness of marine attractions (i.e. beaches, whales), awareness of cultural attributes (i.e. indigenous culture, markets, and cafes) remains low.
- There is some confusion in the marketplace between North Stradbroke Island, South Stradbroke Island and Moreton Island.

Destination Sentiment

- Intention to visit Minjerribah in the future was very high for current visitors (92.4%) and high for potential visitors (71.0%).

- Current and potential visitors were overwhelmingly positive in their evaluations of the island, particularly as one of Australia's best beach, island and nature-based destinations.

Destination Attributes

- Key terms used to describe the island included beautiful/scenic/pretty, unspoilt/ pristine, relaxing, serene/calm/quiet, fun, sandy and nature.
- Minjerribah is perceived by potential visitors as an adventurous family destination that attracts campers, nature/beach lovers, fishermen, surfers, backpackers, retirees, 'bogans' and locals.
- Current visitors were more likely than potential visitors to use terms such as 'walks', 'whales' and 'beaches'.
- An importance-performance analysis of destination attributes highlights several areas for improvement, including: Wi-Fi access/mobile phone coverage, value for money, variety of places to eat, transport access and cost of transport.
- Destination attributes such as clean beaches, marine activities (e.g. swimming, surfing), island atmosphere, wildlife, national parks and land-based activities were positively evaluated by current and potential visitors.

Destination Positioning

- Minjerribah was the only destination of the trip for a majority of visitors (56.8%). In round 3, visitors to Minjerribah were far more likely to combine the island with other SEQ destinations as part of their itinerary.
- Destinations which share similar features to Minjerribah (i.e. beaches, national parks, wildlife) were most likely to be considered by current visitors when planning their trip to Minjerribah.
- Compared with other Pacific island and beach destinations, Minjerribah is well positioned as a desired holiday destination, behind only the Gold Coast and Sunshine Coast.
- Potential visitors were more likely to visit Minjerribah in the next five years than other nearby islands (e.g. Bribie Island, Fraser Island and Moreton Island).
- Analysis of TripAdvisor ratings indicates that Minjerribah receives very positive ratings for activities, outperforming similar off-shore Australian island destinations. Minjerribah is rated less well for restaurants and accommodation but these categories are improving.

Advertising Awareness

- 28.4% (↑2.9%) of current visitors recalled seeing advertising prior to their visit. Most recalls were for social media (i.e. Facebook), email newsletters (e.g. Minjerribah Camping), television advertisements and travel shows, ferry website, bus advertisements, local signage, billboards and newspaper advertisements.
- Most visitors recalled hearing about 'Straddie' through friends and family – usually traditional word of mouth or electronic word of mouth through social media (particularly Facebook and Instagram).
- Only 5% of online panellists recalled seeing any advertising in the last 12 months. This indicates a very low level of advertising awareness.

Information Sources

- For current visitors, ferry websites, Google/Google Maps, family and friends, stradbrokeisland.com and holiday rental agency websites were the most commonly used information sources prior to visiting Minjerribah. Once on the island, visitors relied on Google/Google Maps, and advice from family and friends (usually on social media), signalling that digital information is playing an increasingly important role.
- The relatively high proportion of visitors using mobile devices during their stay highlights the critical need for Wi-Fi and mobile phone connectivity and the need to ensure that digital content displays well on a range of different devices and platforms.
- There has been a notable increase in the number of visitors who recalled using the official Stradbroke Island website and seeing information about Minjerribah on social media.
- Improvements to meet the information needs of visitors can be grouped into a number of key areas, including maps, transport information, beach and water conditions, facilities and services, restaurants and camping facilities.
- Online visitor information is highly fragmented, hard to find and often outdated, making trip planning a time-consuming and frustrating process. With the exception of improvements to the official Stradbroke Island website this continues to be a challenge for visitors.

The Visitor Experience

Evaluation of the visitor experience focussed on current and potential visitor perceptions of transport, accommodation, activities and experiences, Indigenous tourism, food and dining, and local products.

Transport

- There is a heavy reliance on private vehicles to access ferry terminals, imposing a strain on parking facilities during peak periods. Public transport options are inconvenient and time consuming.
- Once on the island, the strong reliance on private vehicles continued, although a quarter of visitors reported that they used the bus or walked.
- Improvements were suggested for ferries, buses, island connectivity, taxis/rideshare, bicycle trails, mainland travel and navigation.

Accommodation

- Camping (28.0%) and holiday rentals (26.2%) were the most common styles of accommodation used by current visitors.
- Potential visitors were interested in holiday rentals, hotel/resort style accommodation, cabins, apartments and B&B style accommodation.
- A comparison of the accommodation preferences of potential visitors by total daily spend shows that higher yield markets were more interested in hotels, resorts, holiday rentals and apartments.
- An analysis of negative TripAdvisor reviews for accommodation on the island identified staff, rooms and food as three major areas of disappointment.
- Suggestions for improving accommodation on the island were grouped under four key themes: quality, availability, choice and access.

Activities and Experiences

- Analysis of visitor settings indicate that all three townships received heavy visitation, although the results do not reveal how much time or money visitors spent at each location.
- The NSI Historical Museum, Myora Springs Conservation Area and Naree Budjong Djara National Park received low visitation.
- Wildlife spotting (58.1%), relaxing or walking on the beach (57.5%); water sports such as swimming, kayaking and surfing (53.7%); watching whales, dolphins and turtles (41.4%); bush walking (40.9%); and dining (39.4%) were major activities for current visitors.
- Potential visitors indicated that the opportunity to watch whales, dolphins and turtles (66.0%); relaxing or walking on the beach (61.3%); bush walking (49.7%); seeing island wildlife (49.1%); and water sports (42.3%) would attract them to the island. Potential visitors also showed strong interest in markets (46%), dining (37.1%), and snorkelling or diving (38.0%).
- Lower yield visitors are more interested in camping, four-wheel driving, fishing and boating, while higher yield visitors are more interested in museums and galleries, dining, events and festivals, markets, and learning about Aboriginal culture.
- TripAdvisor reviews for activities on the island were largely positive. The average rating of 4.75/5.00 was higher than for other benchmark island destinations in the third round.
- Current visitors provided a number of suggestions for improving activities and experiences on the island and these were grouped under six major themes: land-based activities, sea-based activities, indigenous experiences trails, facilities and amenities that cater for special needs and equipment hire.

Indigenous Tourism Experiences

- A majority of current visitors had some awareness of the local Aboriginal community and acknowledged that they had heard the term 'Quandamooka' but the level of awareness amongst online panellists was lower.
- The opportunity to participate in an Aboriginal whale watching tour was rated most highly by both current and potential visitors. There was also some support visiting an Aboriginal cultural site and for an Aboriginal Cultural Centre, which could be used as a focal point for Aboriginal dance, music, performance and art.
- Key target markets for Indigenous experiences include high-yield younger singles, couples, empty nesters and older singles rather than families.
- Most visitors are looking for experiences that are less than two hours in duration. Exceptions include island and whale watching tours, which are more likely to be viewed as half-day or full-day activities.
- Potential visitors are willing to pay more for whale watching tours and accommodation, but are generally prepared to pay less than $40 per person for Aboriginal cultural centres or sites, Aboriginal performances and learning about aboriginal weapons and artefacts.
- Overall, the results suggest that there is limited current recognition or understanding of Aboriginal Culture or Indigenous activities currently available on Minjerribah. Stakeholders should consider marketing strategies to change perceptions and awareness about the unique Aboriginal heritage of the island.

Festivals and Events

- Several major events were cancelled or postponed in 2020/2021 due to the COVID-19 pandemic. The level of participation in existing events was low, with the markets held regularly at Point Lookout being the most attended event on the island.
- Local markets also resonated strongly with potential visitors and there was also strong interest in a seafood festival, music festival, and arts and craft festival.
- Support for local markets was strongest for couples and empty nesters, while health and wellbeing, fishing, running, cycling and sports events appealed to older full nesters.
- Support for a seafood festival was stronger for later stages of the family life cycle while interest in a music festival was strongest for earlier lifecycle stages (young singles and couples).
- Higher yield markets are more likely to be attracted by markets, festivals and events that have a focus on seafood, music or Indigenous culture.
- Current visitors provided suggestions for events and festivals on the island. These suggestions included a weekly food market or night markets and festivals focused on Indigenous culture, seafood, surfing, music and film. There were also suggestions for water sports events such as triathlons and beach-related events such as a sand/beach art festival or a sand castle festival.
- Focus group participants showed low awareness of many of the major events on the island.

Food and dining

- Many visitors dined at restaurants and cafés (52.5%) or ordered takeaway food (45.6%) on the island. Almost half also consumed groceries bought on the mainland.
- Families are most likely to bring groceries from the mainland, however they are also most likely to purchase groceries and takeaway on the island. Families with pre-school children (Family Nest I) were less likely than most other lifecycle segments to buy groceries on the island or to dine at restaurants and cafés but had a strong preference for takeaway food and ice cream.
- Offering a variety of restaurants, cafés and takeaway options are essential for attracting higher yield markets.
- TripAdvisor reviews for restaurants on the island identified a number or issues. The average rating of 4.16/5.00 was lower than for some of the other benchmark island destinations, but has shown some recent improvement. Most negative reviews can be grouped into five broad areas: service quality, cleanliness, food quality, cost and trading hours.
- Current visitors provided a number of suggestions for improving food and dining on the island. These suggestions can be grouped under four key themes: variety of food options, better grocery stores, more family friendly trading hours and restaurants and cafes with ocean views.

Local products

- The ability to purchase local food or produce were important to both current and potential visitors.
- Potential visitors also showed some interest in clothing, arts and crafts, home and garden wares and Aboriginal arts and crafts.
- A comparison of the shopping and local product preferences of low-yield and high-yield potential visitors reveals that higher yield visitors have a stronger interest in most product categories.

Improving the Experience

- Overall, the areas that require the most improvement include the cost of transport (bus and ferry), camping facilities, dining options, service delivery, trading hours, mobile phone and Wi-Fi coverage, and public facilities such as terminals, public toilets and parking.
- Trend analysis of TripAdvisor ratings confirms consistently high ratings for activities and improving ratings for restaurants and accommodation.
- Online survey panellists who did not intend to visit (or were not sure) were asked to suggest improvements that would entice them to visit. The most common suggestions fell into three key areas: (i) improving visitor information; (ii) improving accessibility; and (iii) reducing the cost of visiting Minjerribah.

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List of Abbreviations

ABS	Australian Bureau of Statistics
CSIRO	Commonwealth Scientific & Industrial Research Organisation
DSDILGP	Department of State Development, Infrastructure, Local Government and Planning
DTIS	Department of Tourism, Innovation and Sport
ETS	Economic Transition Strategy
eWoM	Electronic Word of Mouth
FIT	Free Independent Traveller
LTO	Local Tourism Organisation
NSI	North Stradbroke Island
QTIC	Queensland Tourism Industry Council
QYAC	Quandamooka Yoolooburrabee Aboriginal Corporation
RACQ	Royal Automobile Club of Queensland
RTO	Regional Tourism Organisation
SCoC	Straddie Chamber of Commerce
TEQ	Tourism and Events Queensland
TMR	Department of Transport and Main Roads
TRA	Tourism Research Australia
UQ	The University of Queensland
VFR	Visiting Friends and Relatives
WoM	Word of Mouth

1. Background

Minjerribah, or North Stradbroke Island (NSI) as the island was named by European settlers, is the world's second-largest sand island. Located less than an hour from Brisbane, the island boasts a stunning natural environment, a 25,000 year old Indigenous heritage, and more than 2,000 permanent residents. Also known as 'Straddie', Minjerribah is a popular destination for families, who are particularly attracted primarily by the island's beaches and wildlife (EarthCheck, 2015). Minjerribah has around 180 local businesses, with approximately 70% of these directly or indirectly related to the tourism sector, including accommodation, retail, food and beverage, tours and attractions and general services. Tourism is the island's largest employer, with 20 per cent of the island's workforce employed in accommodation and food services (Department of State Development, 2016). However, future tourism opportunities have been constrained by mining activity.

The Queensland Government has committed to phasing out sand mining on Minjerribah and expanding the island's existing industries to ensure a strong, sustainable economy for the future. The **NSI Economic Transition Strategy (ETS)** was released in 2016 to deliver on this commitment (Department of State Development, 2016). The **Minjerribah Futures** program was established to continue the implementation of the ETS. Minjerribah Futures will deliver a range of projects dedicated to:

- developing a sustainable, eco and cultural tourism industry;
- celebrating arts and culture;
- expanding education and training opportunities; and
- supporting economic development and growth.

The ETS identifies a range of future tourism opportunities for Minjerribah, including growth in domestic and international tourism and the establishment of new tourism experiences. However, the strategy also identifies several challenges that could affect the long-term viability of the island's tourism industry, including a lack of private sector investment, fluctuating seasonal visitor numbers, infrastructure capacity during peak periods, inconsistent quality of the tourism product, and accessibility from key tourist departure points. The six-year **Minjerribah Visitor Research Program** is a key action under the ETS and will provide information needed to address these opportunities and challenges.

The **purpose** of the Minjerribah Visitor Research Program is to collect data from a range of sources to better understand the visitor market and its needs. The program provides insights into market awareness, travel intentions, transport and activity preferences, visitor behaviour, and spending patterns for major market segments. The program also identifies potential markets and their level of awareness, preferences and travel intentions.

Insights obtained through the program will inform various stakeholder activities, initiatives and projects that will:

- develop a stronger island economy with a better performing tourism sector that meets visitor expectations;
- improve understanding of current and potential visitors and their needs;
- enhance the overall visitor experience, boosting visitor numbers by attracting new and retaining existing visitors;
- contribute to greater market awareness of Quandamooka Indigenous culture and better targeted Indigenous experiences;
- drive tourism industry development, marketing, investment and infrastructure provision; and
- grow visitor expenditure.

The project is organised into three data collection and reporting rounds between 2017 and 2021. This report is the third and final in the series and summarises the key findings from the third round of data collection, which took place between October 2020 and October 2021.

The success of tourism on the island will depend on the ability of key stakeholders to work closely with traditional owners and residents to create long-term employment opportunities that promote sustainable economic growth, and protect the island's natural and cultural heritage. Visitor research plays a key role in understanding intention to travel, visitor behaviour and visitor spend per day and will assist in enhancing the overall visitor experience and increase visitor numbers and yield.

Understanding the needs of visitors to Minjerribah will enable development of an integrated and effective marketing program for the island. The research presented in this report also informs future infrastructure/services planning to ensure that Minjerribah is positioned to capitalise on tourism growth as it occurs. These insights will support the Queensland Government, the Quandamooka People and the island community to realise the vision "to become Australia's most desirable island community, striking a balance between sustainable economic growth and protection of the island's unique environment" (Department of State Development, 2016).

2. Methodology

2.1 Methodology at a Glance

The project methodology draws on **five data sources** shown in Table 1. The use of multiple data sources allows for the development of a comprehensive profile of current visitors and potential visitors. The data collection plan ensures coverage of past and current local, intrastate, interstate and international visitors as well as potential visitors. The project is organised into three data collection and reporting rounds between 2017 and 2021. This report summarises the key findings from all three rounds of data collection.

Table 1. Key data sources

Data Source	Description	Insights
NSI Visitor Survey *Who:* Current visitors *When:* Round 1: Aug 2017-Jan 2018 Round 2: Jul 2018-May 2019 Round 3: Oct 2020-Oct 2021	Visitor surveys conducted bi-annually at different times throughout the year to capture seasonal variations.	▪ Awareness of Minjerribah ▪ Information sources/advertising ▪ Satisfaction and repeat visitation ▪ Visitor motives, behaviour, preferences ▪ Expenditure and length of stay ▪ Demand for Indigenous experiences
Online Survey Panel *Who:* Potential visitors *When:* Round 1: Jan 2018-Feb 2018 Round 2: Dec 2018-May 2019 Round 3: Sep 2021-Oct 2021	Online surveys collected throughout the project to capture domestic non-visitors. Internet market research panels are a cost-effective approach for recruiting participants.	▪ Awareness of Minjerribah ▪ Information sources/advertising ▪ Travel intentions ▪ Visitor motives, behaviour, preferences ▪ Visitor constraints and facilitators ▪ Benchmarking with other islands ▪ Demand for Indigenous experiences
Focus Groups *Who:* Visitors & non-visitors *When:* Round 1: Jan 2018-Feb 2018 Round 2: Nov 2018-Apr 2019 Round 3: Jul 2021-Aug 2021	Focus groups provide a more nuanced understanding of insights identified through the surveys.	▪ Awareness of Minjerribah ▪ Information sources/advertising ▪ Visitor motives, behaviour, preferences ▪ Visitor constraints and facilitators
TripAdvisor Reviews *Who:* Past visitors *When:* Round 1: Feb 2018 Round 2: May 2019 Round 3: Oct 2021	Analysis of TripAdvisor Reviews to gain insights into post-consumption evaluations of Minjerribah and to benchmark Minjerribah against competing experiences.	▪ Origin and satisfaction of reviewers ▪ Identification of 'hero experiences' ▪ Barriers and facilitators ▪ Areas for improvement ▪ Seasonal variations and trends ▪ Benchmarking with other islands
Secondary Data *Who:* Visitors *When:* Round 1: Aug 2017-Feb 2018 Round 2: Jun 2018-May 2019 Round 3: Oct 2020-Oct 2021	Desktop audit of existing data sources, including passenger numbers for major modes of transport, accommodation occupancy, and Australian Bureau of Statistics data.	▪ Baseline data ▪ Comparative statistics ▪ Long term trends ▪ Visitor numbers, trends and seasonality ▪ Transport preferences

2.2 Data Sources

2.2.1 NSI Visitor Survey

The NSI Visitor Survey was developed to understand the characteristics and preferences of current visitors to the island (Appendix 1). The NSI Visitor Survey provides baseline data about current visitors. The surveys were collected in three survey rounds spanning more than four years (see Table 2).

Table 2. NSI Visitor Survey Rounds

Round	Dates	Survey Days	Total Responses	Valid Responses
Round 1	August 2017-January 2018	21	917	649
Round 2	July 2018-May 2019	24	1,247	891
Round 3	October 2020-October 2021	25	769	609
Total	**August 2017-October 2021**	**70**	**2,933**	**2,149**

Round 1 surveys were primarily collected on water taxi and vehicle ferry services returning to the mainland between 2pm – 5pm on selected survey dates. Visitors were also intercepted at key events and sites on the island to collect email contact details for a follow up online survey. Round 1 surveys were collected on 21 different days between August 2017 and January 2018. The survey dates included weekdays, weekends, peak and off-peak periods. Some survey dates were also selected to coincide with major events on the island. The target sample size for the scoping study was 300-400 surveys but this target was exceeded with 917 surveys at the end of the survey period. Incomplete and invalid surveys were removed from the sample, resulting in a final sample of 649 respondents.

Round 2 surveys were also mainly collected on water taxi and vehicle ferry services returning to the mainland between 2pm – 5pm on selected survey dates. Visitors were also intercepted at key events and sites on the island to collect email contact details for a follow up online survey. Surveys were collected on 24 different days between July 2018 and May 2019. The survey dates included weekdays, weekends, peak and off-peak periods. Some survey dates were also selected to coincide with major events on the island, including the 2018 Quandamooka Festival, Island Vibe, Chamber Music Festival, OKA Campout, Straddie Assault and Straddie Salute 2019. The target sample size for the round 2 study was 1,000-1,500 respondents and this target was accomplished with 1,247 surveys at the end of the survey period. Incomplete and invalid surveys were removed from the sample, resulting in a final sample of 891 current visitors.

Round 3 was originally planned for July 2020 to June 2021 but was delayed due to COVID-19 restrictions. Round 3 surveys were primarily administered on water taxi and vehicle ferry services returning to the mainland between 2pm and 6pm on selected survey dates. The survey dates included weekdays, weekends, peak and off-peak periods. Research Assistants were employed and trained to assist with data collection. Surveys were collected on 25 different days between October 2020 and October 2021. Due to COVID-19 restrictions, it was not possible to collect surveys in person until December 2021. Instead, visitors wishing to complete the survey provided their contact details and the project team emailed a link to an online version of the survey. The target sample size for the round 3 study was 800 respondents but due to COVID-19 restrictions and intermittent weather during peak periods, several planned survey dates were rescheduled, resulting in a lower response rate. A total of 769 surveys were collected at the end of the survey period. Incomplete and invalid surveys were removed from the sample, resulting in a final sample of 609 current visitors.

2.2.2 Online Panel

Potential visitors were surveyed by recruiting participants through an Online Survey Panel of Australian consumers. The survey was developed in consultation with key stakeholders and focussed on the perceptions and awareness of potential visitors (see Appendix 2). The Online Panel was also deployed during each of the three data collection rounds but data collection dates were more concentrated (See Table 3).

Table 3. Online Panel Survey Rounds

Round	Dates	Total Responses	Valid Responses
Round 1	January 2018-February 2018	589	478
Round 2	December 2018-May 2019	1,264	808
Round 3	September 2021-October 2021	903	652
Total	**January 2017-October 2021**	**2,756**	**1,938**

A quota sampling method was used to ensure that at least 70% of respondents were from South East Queensland, with the remainder from other parts of Australia. This broad sample provides important data about potential visitors and their awareness of Minjerribah and major competitors, preferences, and constraints and facilitators to visiting.

Round 1 surveys were collected online in January and February 2018. The target sample size was 500 responses, but this was exceeded with 589 responses. 478 surveys were retained for further analysis after eliminating invalid responses.

In **Round 2**, two waves of surveys were collected online in 2018 and 2019. The target sample size was 1,000 responses but this was exceeded with 1,264 responses. 808 surveys were retained for further analysis after eliminating invalid responses.

The **Round 3** panel was surveyed in September and October 2021. The target sample size was 800 responses, but this was exceeded with 903 responses. 652 surveys were retained for further analysis after eliminating invalid responses.

2.2.3 Focus Groups

In total, six focus groups were conducted with visitors and non-visitors across the entire project. Each round included one group of recent visits and a group of non-visitors. The aims of the focus groups were to further explore perceptions of Minjerribah and to identify perceived constraints to visiting Minjerribah. The focus groups consisted of five to eight participants. The visitor focus group included participants who had visited Minjerribah in the last five years, while the non-visitor focus group included participants who had never visited the island. These focus group sessions allowed us to further explore some of the insights identified through the surveys. The results are integrated throughout this report with the survey findings.

2.2.4 TripAdvisor Reviews

TripAdvisor reviews provide a wealth of data about visitor preferences and satisfaction. TripAdvisor reviews and ratings were collected for restaurants, accommodation and activities on Minjerribah, Bribie Island, Fraser Island, Kangaroo Island, Magnetic Island and Moreton Island. Table 4 provides a summary of the TripAdvisor data, including the number of operators and the total number of reviews for each destination.

Table 4. TripAdvisor benchmark destination data

Destination	Accommodation		Restaurants		Activities	
	Operators	Reviews	Operators	Reviews	Operators	Reviews
Bribie Island	13	722	54	3,886	36	1,470
Fraser Island	16	2,359	7	800	55	14,916
Kangaroo Island	91	7,964	49	5,951	201	14,573
Magnetic Island	37	5.665	36	5,892	61	6,069
Moreton Island	5	192	8	1,015	31	1,891
North Stradbroke Island	22	1,581	23	849	23	1,464

Source: TripAdvisor

The ratings were analysed to benchmark visitor satisfaction with Minjerribah against other off-shore islands. Reviews were also analysed to extract the key themes influencing visitor ratings of Minjerribah restaurants, accommodation and activities. The TripAdvisor reviews broaden the sample by including visitors who were not included in the NSI Visitor Survey or the Online Panel but who may nevertheless have useful feedback.

2.2.5 Secondary Data

A desktop audit was conducted to identify existing data sources such as statistics and passenger numbers for major modes of transport to the Island. A scan of available information and reports is conducted during each data collection round to identify baseline data and gaps in knowledge. Secondary data presented in this report was collected from the sources shown in Table 5.

Table 5. Secondary Data Sources

Source	Year	Type	Provider
Camping occupancy	2019	Data	Minjerribah Camping
Water taxi patronage	2019	Data	Department of Transport & Main Roads
Google trends	2019	Data	Google
Visitor reviews	2019	Text	TripAdvisor
Annual Report 2017-2018	2019	Report	QYAC
Brisbane Regional Tourism Workforce Plan: 2018-2020	2018	Plan	Jobs Queensland
Dunwich (Goompi) Master Plan: Stage 1 Consultation Report	2018	Report	Queensland Government
Annual Report 2017-2018	2018	Report	Sealink Travel Group
Accommodation occupancy	2018	Data	Straddie Chamber of Commerce
Census data	2018	Data	Australian Bureau of Statistics
Tourism Data Redlands	2017	Report	Tourism Research Australia
North Stradbroke Island Economic Transition Strategy	2016	Plan	Queensland Government
Submission to the Draft North Stradbroke Island Economic Transition Strategy	2016	Submission	Queensland Tourism Industry Council
NSI Tourism Project Prioritisation for the Economic Transition Plan	2015	Report	EarthCheck
NSI Marketing and Communications Plan	2015	Plan	Straddie Chamber of Commerce
Redland City Tourism Strategy and Action Plan	2014	Plan	Redland City Council
The Future of Tourism in Queensland	2013	Report	CSIRO
Visitation to the Redlands	2012	Report	Footprints Market Research
Planning for Action (Draft): A sustainable economic future for NSI	2011	Plan	Queensland Government
Towards Sustainability: An action plan for NSI	2010	Plan	Tourism and Events Queensland/EC3 Global
Moreton Bay and Islands: Awareness and Consideration Research	2009	Report	TNS Consultants

3. Results

3.1 Introduction

The findings from all six data sources are organised around six major sections that answer key questions about current and potential visitors and their needs:

1. **Market Profile:** Who are the visitors? What motives drive visitation to Minjerribah? What are the reasons for not visiting? How much do visitors spend?
2. **Market Origin:** Where do visitors come from?
3. **Seasonality:** When do visitors come to the island?
4. **Destination Awareness:** How much do current and potential visitors know about Minjerribah? How do current and potential visitors perceive the destination? What are the key destination attributes? How is the destination positioned relative to competitors? How aware are visitors of advertising for the destination? What information sources do visitors use?
5. **The Visitor Experience**: Why do visitors come to the island? What experiences are current and potential visitors seeking? What aspects of the visitor experience can be improved?

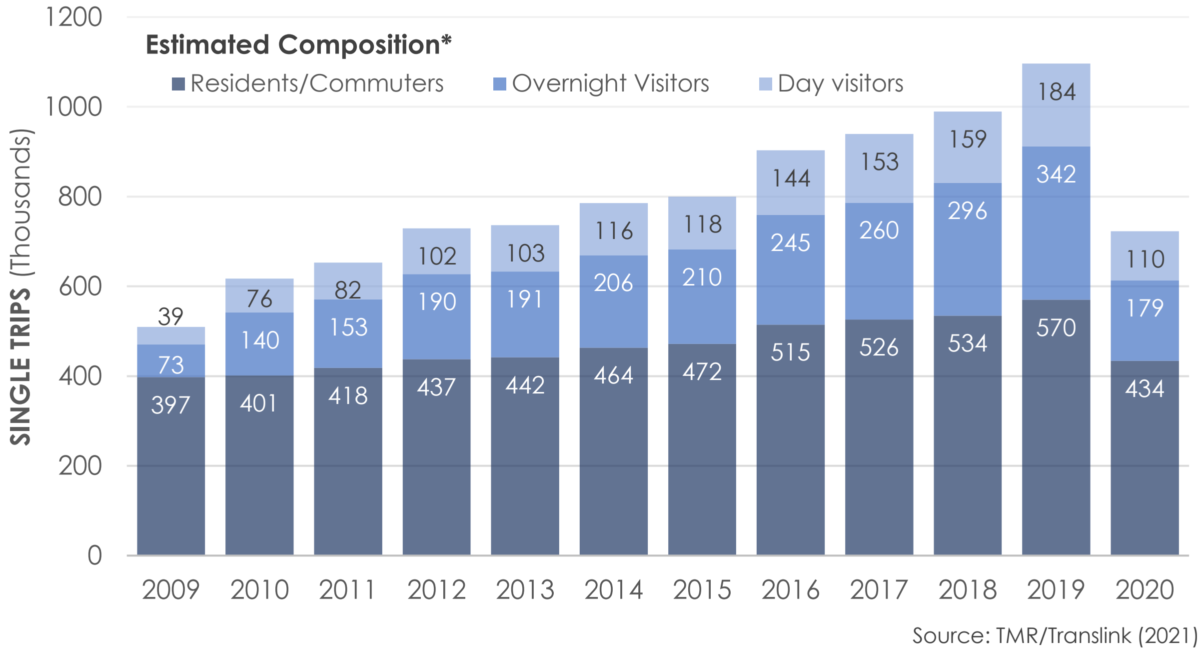
3.2 Market Profile

3.2.1 Visitor Numbers

Estimating visitor numbers at the regional level can be very challenging but the task is somewhat simpler for island destinations that have a small number of access points. Visitor statistics are not directly captured for Minjerribah but data are reported for the wider region. In 2014 for example, the wider Cleveland-Stradbroke region received approximately 800,000 visitors with an average length of stay of 1.8 nights (EarthCheck, 2015). In 2010, it was estimated that the Island attracted between 300,000 to 400,000 visitors per year (EC3 Global, 2010).

Ferry passenger numbers provide the most reliable data source for estimating visitor numbers to Minjerribah. Figure 1 shows the total number of passenger trips on water taxi services between the mainland and Minjerribah over the last twelve years. The data represents the number of single trips sold (i.e. a return ticket will be counted as two trips). Passengers are assumed to undertake a return trip, so the number of passengers would be approximately 50% of the totals shown in Figure 1. Between 2009 and 2019, water taxi patronage grew at an average rate of 8,1% p.a. to reach over 1 million trips in 2019. The number of single trips taken on the two major water taxi services **increased by 10.7% in 2019** but **declined by 34.1% in 2020** due to COVID-19 travel restrictions.

Water taxi patronage includes both residents and visitors. Based on screening questions to identify visitors during the survey work, we estimate that approximately 40% of trips in 2020/2021 were undertaken by visitors. Minjerribah visitor survey data indicates that day trippers made up 38.3% of visitors to the island in 2020/2021. Using actual water taxi patronage data as a starting point, the number of single trips undertaken by residents, day visitors and overnight visitors can be estimated. ABS data indicates that the number of residents on the island has not changed considerably between the 2011 and 2016 census and it is assumed that the number of trips undertaken by residents/commuters has not changed considerably. Therefore, based on available data it is estimated that 250,000 to 270,000 visitors took a return trip by water taxi in 2019. This number dropped to 130,000 to 150,000 visitors in 2020.



***Note:** Yearly totals based on actual data. Composition estimated based on occupancy data and survey responses.

Figure 1. Minjerribah water taxi patronage and estimated composition

The vehicle ferry operated by Stradbroke Ferries (Sealink) is the other major source of visitors to the island. Passenger numbers for this service are not publicly available, making it difficult to accurately measure the total number of visitors to the island. However, based on observations during survey work, it is estimated that 140,000 to 180,000 passengers accessed the island via the vehicle ferry in 2019. Based on the decline in passenger ferry patronage and occupancy figures, it is estimated that 90,000 to 120,000 passengers accessed the island via the vehicle ferry in 2020.

Modelling based on these estimates indicates that total visitation for **2019** was between **390,000 to 450,000** visitors. Due to the COVID-19 pandemic, it is estimated that between **220,000 to 270,000** visitors visited the island in **2020**. These are conservative estimates based on available water taxi patronage, occupancy data and responses to the NSI Visitor Survey. Future audits of the number of residents and visitors departing on ferry services at different times of the week, month and year would improve the precision of this modelling.

While COVID-19 travel restrictions resulted in a significant decline in visitation during 2020, water taxi patronage has recovered steadily throughout 2021. Despite border closures, September 2021 was the busiest September on record. Passenger trips for the first nine months of 2021 increased by 20.1% compared with the first nine months of 2020. Based on current projections, total visitation for 2021 is likely to be between 300,000 to 340,000 visitors. As the economy recovers in 2022, **visitation is likely to return rapidly** to pre COVID-19 levels.

3.2.2 Visitor Profile

The age profile indicates that 43.7% of visitors in 2020/2021 were aged between 36 and 55, with a **median age of 41** (see Table 6). The proportion of current visitors aged between 36 and 55 years was higher than the general Australian population (26.7%) (ABS, 2016). The age profile is broadly consistent with NVS and IVS data for Brisbane and Queensland (Tourism Research Australia, 2018), but older visitors (56 and over) are underrepresented. Day trippers (median age = 40) were slightly younger than overnight visitors (median age = 41) but this difference was not significant. Younger visitors (18 to 25 years) were overrepresented in the round 1 visitor data, resulting in an age profile that was younger than the sample surveyed in rounds 2 and 3. The round 3 data included a higher proportion of overnight stays aged 26 to 35 than the previous two rounds.

Table 6. Age, family lifecycle and ethnicity of current visitors

Current Visitors	Round 1		Round 2		Round 3	
	Day Trippers	Overnight Stays	Day Trippers	Overnight Stays	Day Trippers	Overnight Stays
Age	n=214	n=374	n=252	n=524	n=210	n=369
18 to 25	21.5%	13.1%	11.9%	9.2%	11.4%	10.6%
26 to 35	24.3%	19.0%	16.7%	19.7%	22.9%	26.0%
36 to 45	17.3%	25.4%	26.6%	30.5%	23.8%	22.5%
46 to 55	21.5%	24.9%	21.4%	26.1%	18.6%	22.0%
56 to 65	9.8%	12.3%	15.5%	10.9%	14.3%	11.4%
Over 65	5.6%	5.3%	7.9%	3.6%	9.0%	7.6%
Family Lifecycle	n=206	n=358	n=224	n=495	n=206	n=360
Younger Singles	28.2%	20.4%	14.7%	14.9%	24.8%	19.4%
Younger Couples	14.1%	12.0%	16.1%	16.4%	13.6%	13.3%
Full Nester I (Pre-school)	9.2%	9.5%	8.5%	6.1%	5.8%	3.9%
Full Nester II (Primary)	18.9%	26.5%	14.3%	24.2%	15.0%	20.0%
Full Nester III (Secondary)	11.2%	13.4%	19.2%	20.0%	14.1%	20.6%
Empty Nesters	13.1%	12.8%	18.8%	12.5%	17.5%	14.4%
Older Singles	5.3%	5.3%	8.5%	5.9%	9.2%	8.3%
Indigenous Heritage	n=237	n=398	n=262	n=550	n=224	n=377
ATSI	5.9%	2.5%	4.9%	2.9%	2.7%	6.1%
Quandamooka peoples	1.3%	0.3%	1.5%	1.8%	1.8%	3.2%

Note: darker shading indicates higher values   Source: NSI Visitor Survey

One of the key goals in the original ETS was to "create an accessible playground for Queensland families." The demographic profile is consistent with this and shows a strong predisposition toward **families**[1]. Overall, 41% of visitors surveyed in round 3 were 'Full Nesters', with a majority including families with primary and secondary school-aged children. The proportion of younger (Full Nest I) families was noticeably lower than previous survey rounds.

Consistent with previous rounds, only a small proportion of visitors (4.8%) identified as Aboriginal or Torres Strait Islanders, although this percentage was consistent with the Queensland population (4.0%) and higher than the Australian population (2.8%). As with

[1] The traditional family lifecycle stages include younger singles (no children, living on their own or with friends), younger couples (below 55, no children, living with their partner), full nester I (families with children aged below 5), full nester II (families with children aged between 6 and 12), full nester III (families with older children aged 13 or older), empty nesters (older, living with partner), and older singles (over 55, living alone).

previous rounds, our research assistants noted that a number of Quandamooka visitors declined to participate in the survey because they did not consider themselves to be 'visitors' to Minjerribah.

Ethics requirements prevented us from surveying visitors aged under 18. However, while surveying on the ferries we observed many day-trippers aged between 12 and 17 travelling in friendship groups. Conversations with several groups revealed that they were most likely to participate in marine-based activities (e.g. surfing, swimming, relaxing on the beach) while on the island. It is common for parents to provide teens with $50 'spending money' for a day trip on the island.

The demographic profile of respondents to the online panel is shown in Table 7. The online panel data indicates a more diverse demographic mix of potential visitors could be attracted to the island. As with previous survey rounds, a large proportion (93.9%) of online panellists indicated that they would stay overnight if they visited the island. These results suggest that Minjerribah may not be perceived to be an easy day trip destination.

Table 7. Age, family lifecycle and ethnicity of online panel

Current Visitors	Round 1		Round 2		Round 3	
	Day Trippers	Overnight Stays	Day Trippers	Overnight Stays	Day Trippers	Overnight Stays
Age	n=36	n=373	n=42	n=614	n=34	n=523
18 to 25	11.1%	11.8%	19.0%	20.4%	11.8%	6.3%
26 to 35	11.1%	23.3%	23.8%	22.3%	17.6%	25.8%
36 to 45	5.6%	21.4%	21.4%	22.3%	17.6%	29.4%
46 to 55	5.6%	15.3%	11.9%	17.8%	17.6%	22.6%
56 to 65	22.2%	12.9%	9.5%	9.1%	8.8%	9.8%
Over 65	44.4%	15.2%	14.3%	8.1%	26.5%	6.1%
Family Lifecycle	n=35	n=360	n=36	n=510	n=33	n=505
Younger Singles	11.4%	13.3%	27.8%	21.0%	21.2%	14.2%
Younger Couples	2.9%	8.9%	19.4%	15.5%	6.1%	14.4%
Full Nester I (Pre-school)	5.7%	21.1%	2.8%	9.8%	6.1%	8.8%
Full Nester II (Primary)	8.6%	14.2%	11.1%	19.4%	9.1%	19.0%
Full Nester III (Secondary)	2.9%	9.4%	5.6%	7.3%	18.2%	19.6%
Empty Nesters	51.4%	21.9%	25.0%	17.3%	18.2%	14.6%
Older Singles	17.1%	11.1%	8.3%	9.8%	21.2%	9.6%
Indigenous Heritage	n=36	n=370	n=41	n=610	n=34	n=523
ATSI	0.0%	1.9%	0.0%	2.3%	0.0%	4.2%
Quandamooka peoples	0.0%	1.1%	0.0%	1.0%	0.0%	1.0%

*Note: Number (n) of potential day trippers was small

Source: Online Survey Panel

As with previous rounds, Table 8 shows that the socio-demographic profile of current visitors is bi-modal, with the most common **household income** categories being $50,001 to $110,000 (32.8%) and above $200,000 (12.8%). This distribution is indicative of single income vs dual income households. Most respondents indicated that they were **employed full-time**. The results are largely consistent with the findings in previous rounds and suggest a market that has limited discretionary leisure time during school terms. Weekends and school holidays are likely to be the best times for these markets to visit the island (see Seasonality). Efforts to address the highly seasonal nature of visitation could focus on attracting visitors who are less constrained by family and school commitments, such as singles and couples.

Table 8. Socio-demographic profile of current visitors

Current Visitors	Round 1 Day Trippers	Round 1 Overnight Stays	Round 2 Day Trippers	Round 2 Overnight Stays	Round 3 Day Trippers	Round 3 Overnight Stays
Annual Household Income	n=222	n=379	n=247	n=536	n=218	n=368
Less than $50,000	13.5%	5.8%	15.4%	7.6%	14.2%	11.1%
$50,001 to $80,000	13.5%	11.1%	15.0%	14.4%	17.9%	16.3%
$80,001 to $110,000	14.0%	15.6%	18.2%	11.9%	14.7%	16.6%
$110,001 to $140,000	8.6%	11.1%	10.1%	11.9%	7.3%	10.9%
$140,001 to $170,000	9.0%	8.4%	4.9%	9.9%	6.9%	8.7%
$170,001 to $200,000	4.5%	7.7%	5.7%	8.6%	6.9%	9.5%
Above $200,000	10.4%	15.0%	10.1%	17.9%	11.0%	13.9%
Prefer not to say	26.6%	25.3%	20.6%	17.7%	21.1%	13.0%
Employment Status	n=227	n=389	n=257	n=545	n=220	n=370
Unemployed	1.3%	0.5%	3.5%	0.9%	2.3%	2.2%
Studying	6.2%	3.6%	3.9%	3.1%	4.5%	4.6%
Working part-time	8.8%	8.0%	12.5%	10.1%	13.6%	14.9%
Working full-time	72.2%	74.8%	64.2%	77.6%	65.0%	68.6%
Retired	7.0%	5.7%	10.1%	5.0%	10.5%	7.8%
Prefer not to say	3.5%	4.4%	1.9%	1.3%	3.2%	1.1%
Other	0.9%	3.1%	3.9%	2.0%	0.9%	0.8%

Source: NSI Visitor Survey

Table 9 presents the socio-demographic profile for the online panellists. The online panel included a higher proportion of respondents from lower income brackets. Retirees were overrepresented in the round 1 data. Quotas were applied in subsequent rounds to ensure the sample aligned more closely with the current visitor profile.

Table 9. Socio-demographic profile of online panel

Current Visitors	Round 1 Day Trippers	Round 1 Overnight Stays	Round 2 Day Trippers	Round 2 Overnight Stays	Round 3 Day Trippers	Round 3 Overnight Stays
Annual Household Income	n=36	n=373	n=42	n=614	n=34	n=523
Less than $50,000	52.8%	26.5%	23.8%	17.9%	26.5%	17.0%
$50,001 to $80,000	19.4%	24.7%	21.4%	20.8%	35.3%	20.3%
$80,001 to $110,000	5.6%	14.5%	11.9%	21.2%	14.7%	15.1%
$110,001 to $140,000	2.8%	11.0%	16.7%	12.9%	8.8%	15.3%
$140,001 to $170,000	2.8%	5.4%	7.1%	11.1%	5.9%	10.3%
$170,001 to $200,000	2.8%	3.5%	4.8%	5.0%	2.9%	6.9%
Above $200,000	0.0%	1.6%	4.8%	4.9%	0.0%	7.5%
Prefer not to say	13.9%	12.9%	9.5%	6.2%	5.9%	7.6%
Employment Status	n=36	n=373	n=42	n=614	n=34	n=523
Unemployed	2.8%	4.0%	4.8%	2.9%	8.8%	6.9%
Studying	2.8%	4.0%	7.1%	3.9%	0.0%	1.9%
Working part-time	22.2%	16.6%	11.9%	14.8%	14.7%	15.9%
Working full-time	19.4%	50.7%	50.0%	65.1%	44.1%	62.7%
Retired	50.0%	19.0%	23.8%	10.3%	26.5%	9.8%
Prefer not to say	0.0%	1.9%	0.0%	1.3%	5.9%	0.2%
Other	2.8%	3.8%	2.4%	1.6%	0.0%	2.7%

*Note: Number (n) of potential day trippers was small

Source: Online Survey Panel

3.2.3 Trip Characteristics

The island is predominantly a leisure destination. The majority of visitors (80.5%) indicated that a **holiday** was the primary reason for visiting the island. The percentage of leisure travellers was higher than the result in the round 1 (64.7%) and round 2 (70.1%) surveys. Other reasons included visiting friends and relatives (VFR) (8.9%), attending an event (3.0%), business (3.4%) and education/research (0.8%). The percentage of visitors visiting primarily for an event was significantly lower in 2020/2021 due to the cancellation of most major events as a result of the COVID-19 pandemic.

Travel party composition highlights the importance of families, with 37.7% of visitors indicating that they were travelling with children or extended family (see Table 10). Most of the remaining visitors were traveling with friends or partners. The average travel party size was three visitors.

Table 10. Travel party composition of current visitors

Current Visitors	Round 1	Round 2	Round 3
Visiting alone	7.4%	5.7%	7.3%
Visiting with partner	20.2%	21.8%	26.2%
Visiting with partner and children	27.5%	24.3%	24.2%
Visiting with extended family	17.6%	13.8%	13.5%
Visiting with a group of friends	20.4%	27.3%	21.6%
Visiting with business associates	1.1%	1.6%	1.2%
Organised tour or group	0.6%	0.1%	1.4%
School/university group	0.2%	1.7%	0.9%
Other	5.0%	3.7%	3.7%

Source: NSI Visitor Survey

The vast majority of visitors were **free independent travellers (FITs)**. FITs are solo, couple or family travellers planning their own travel itineraries without the assistance of a group tour or pre-arranged schedule. It should be noted that the percentage of visitors on organised tours may be underrepresented in this report due to the challenges of surveying these visitors. As noted in our previous reports, there are considerable future opportunities to target group tour markets such as cruise passengers, education groups and retirees. This would allow the destination to serve markets which are under-represented (i.e. seniors) and may assist in alleviating seasonality challenges.

The results for round 3 indicate a relatively high rate (70.0%) of **repeat visitation** (see Table 11). The drivers of this repeat visitation are likely to be close proximity of the island to current source markets (see Market Origin) and generally positive visitor satisfaction. Many visitors have been coming to the island for a considerable period of time and are likely to have a strong emotional attachment to the destination. The round 3 data also show a significantly higher percentage of first-time visitors. Limited opportunities to travel interstate and overseas during the COVID-19 pandemic has increased demand for local travel experiences.

Table 11. Current visitors repeat visitation

	Round 1	Round 2	Round 3
Previous Visits	n=620	n=857	n=603
None	23.1%	20.7%	30.0%
Once before	12.7%	13.4%	16.6%
2 to 5 times	16.5%	23.7%	21.1%
More than 5 times	47.7%	42.2%	32.3%
First visit	n=493	n=561	n=378
Before 1980	7.7%	9.1%	6.3%
1980s	10.8%	13.9%	10.6%
1990s	16.8%	16.0%	17.5%
2000s	17.8%	25.7%	22.0%
2010s	46.9%	35.3%	37.0%
2020s	-	-	6.6%
Trip Frequency	n=453	n=665	n=421
Every few years	24.3%	32.5%	43.9%
Once a year	25.4%	22.4%	17.3%
Twice a year	15.5%	15.0%	8.8%
More than twice a year	34.9%	30.1%	29.9%

Source: NSI Visitor Survey

The online panel included travellers who had visited the island one or more times in the past (48.0%), but most respondents had not visited the island previously (see Table 12). A majority of online panellists who have previously visited have recently experienced the island.

Table 12. Online panel previous visits

	Round 1	Round 2	Round 3
Previous visits	n=409	n=808	n=652
None	46.7%	55.7%	52.0%
Once before	28.9%	21.4%	23.5%
2 to 5 times	15.6%	14.9%	17.6%
More than 5 times	8.8%	8.0%	6.9%
First visit	n=211	n=354	n=311
Before 2000	47.1%	32.2%	31.2%
2000s	27.6%	31.4%	26.7%
2010s	25.7%	36.4%	37.0%
2020s	-	-	5.1%
Most recent visit	n=226	n=331	n=249
Before 2000	25.2%	13.2%	12.9%
2000s	25.8%	20.4%	18.4%
2010s	49.1%	65.7%	49.0%
2020s	-	-	12.9%

Source: Online Survey Panel

In round 3, day trippers made up 38.3% of visitors to the island (Table 13). The mean **length of stay** for overnight visitors was 3.4 nights, with a median of 3 nights. This was lower than the mean length of stay recorded in previous rounds. The mean intended length of stay for online panellists who indicated they would like to visit the island was 3.9, with a median of 4 nights.

Table 13. Current and intended length of stay

	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Day trippers	37.3%	33.3%	38.3%	8.8%	6.4%	6.1%
1 night	7.6%	7.6%	7.4%	2.7%	3.0%	3.2%
2 nights	15.4%	25.3%	18.6%	13.2%	15.1%	16.5%
3 nights	8.8%	9.6%	16.1%	23.2%	24.4%	22.1%
4 nights	6.0%	7.3%	6.2%	10.5%	11.3%	13.8%
5-7 nights	14.3%	13.8%	11.2%	33.5%	34.8%	34.5%
More than 7 nights	10.6%	3.1%	2.3%	8.1%	5.0%	3.8%

Source: NSI Visitor Survey, Online Survey Panel

Similar to previous rounds, Table 13 indicates that visitors who were committed to staying overnight generally stayed for more than two nights, with two, three and seven night stays being the most common. Potential visitors were far more likely to indicate that they would stay overnight.

Table 14 provides a breakdown of current visitors' length of stay by family lifecycle. The mean nights for each segment indicate that that young singles, younger couples, young families (Full Nest I) and older singles tend to prefer shorter overnight stays (1-3 nights), while older families (Full Nest II, Full Nest III) tend to prefer longer overnight stays.

Table 14. Current visitors length of stay by family lifecycle

Current Visitors	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Day trippers	45.6%	37.7%	46.2%	30.1%	28.2%	41.6%	40.0%
1 night	12.8%	6.5%	3.8%	4.9%	5.8%	6.7%	10.0%
2 nights	23.2%	28.6%	11.5%	14.6%	17.5%	10.1%	18.0%
3 nights	8.8%	19.5%	23.1%	19.4%	16.5%	16.9%	18.0%
4 nights	4.8%	2.6%	7.7%	12.6%	5.8%	4.5%	8.0%
5-7 nights	3.2%	5.2%	7.7%	16.5%	19.4%	16.9%	6.0%
More than 7 nights	1.6%	-	-	1.9%	6.8%	3.4%	-
Mean Nights*	**2.59**	**2.54**	**3.07**	**3.69**	**4.15**	**3.94**	**2.77**

*Note: Mean excludes day trippers. Source: NSI Visitor Survey

Further insight can be gained by breaking down current visitors' length of stay by accommodation type (Table 15). The findings indicate that visitors staying in caravan parks, holiday rentals and apartments tended to stay longer. Weekend (2 nights), long weekends (3 nights) or full week trips (5-7 nights) were the most common lengths of stay.

Table 15. Current visitors length of stay by accommodation type

Current Visitors	Camping	Caravan Park	Own Property	Hotel or Resort	Holiday Rental	Apart-ment	VFR
1 night	14.2%	4.0%	7.7%	8.1%	11.1%	7.1%	10.0%
2 nights	29.2%	12.0%	23.1%	43.2%	22.2%	23.2%	10.0%
3 nights	21.7%	32.0%	34.6%	24.3%	44.4%	29.3%	30.0%
4 nights	13.2%	20.0%	7.7%	5.4%	0.0%	15.2%	13.3%
5-7 nights	17.0%	28.0%	19.2%	18.9%	14.8%	20.2%	26.7%
More than 7 nights	4.7%	4.0%	7.7%	0.0%	7.4%	5.1%	10.0%
Mean Nights	**2.98**	**3.29**	**2.63**	**2.86**	**3.30**	**3.55**	**2.30**

Source: NSI Visitor Survey

3.2.4 Reasons for Visiting

Current visitors were asked to rate how important various reasons were to their decision to visit Minjerribah (1=Not at all important … 5=Very important). Online panellists were asked to rate how important various reasons were to them when choosing a holiday. Both current visitors and online panellists were then asked to rate how well they felt NSI performed (1=Very poor…5=Exceptional) against each item. Survey respondents were able to select 'Not Sure' if they were not able to evaluate an item and these responses were excluded from the analysis.

The reasons included in both surveys are linked with well-established **visitor motives**, including social needs (meeting visitors and locals), relationship needs (romance, family and friends), self-esteem needs (belonging), self-development (learning about the island/Aboriginal culture), nostalgia (reliving memories), novelty (new experiences), sensation seeking (adventure), nature (close to nature, enjoying the outdoors), and escape (rest and relaxation, escape from city, enjoy scenery). The resulting importance-performance analysis for current visitors and online panellists are presented in Figure 2 and Figure 3.

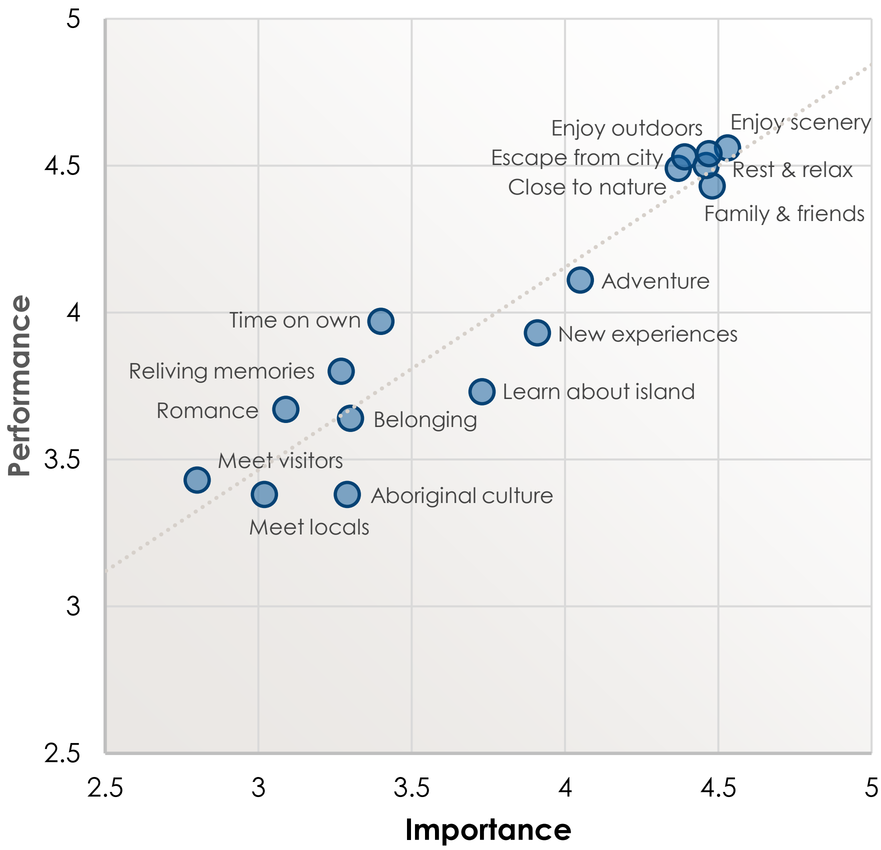


Figure 2. Importance-Performance analysis of current visitor motives

The results identify motives that are important to current visitors as well as areas where needs may not be currently met. Rather than presenting a traditional performance-importance grid, we suggest focussing on motives below the line.

The results for both survey groups were very consistent with previous rounds. Learning about aboriginal culture, learning about the island, and experiencing new things are moderately important motives for current visitors but are under-performing. The overall experience can be improved by focussing on activities designed to appeal to these motives. On the other hand, the destination excels at providing experiences that appeal to escape and relaxation needs. This is consistent with the island as a place of healing and a sanctuary where visitors can connect with nature, enjoy outdoor scenery, and rest and rejuvenate from the stresses of city life. This is also consistent with the comments of focus group participants who had visited the island previously. The importance of the island as a place to reconnect with family and friends is also highlighted as a strong motive.

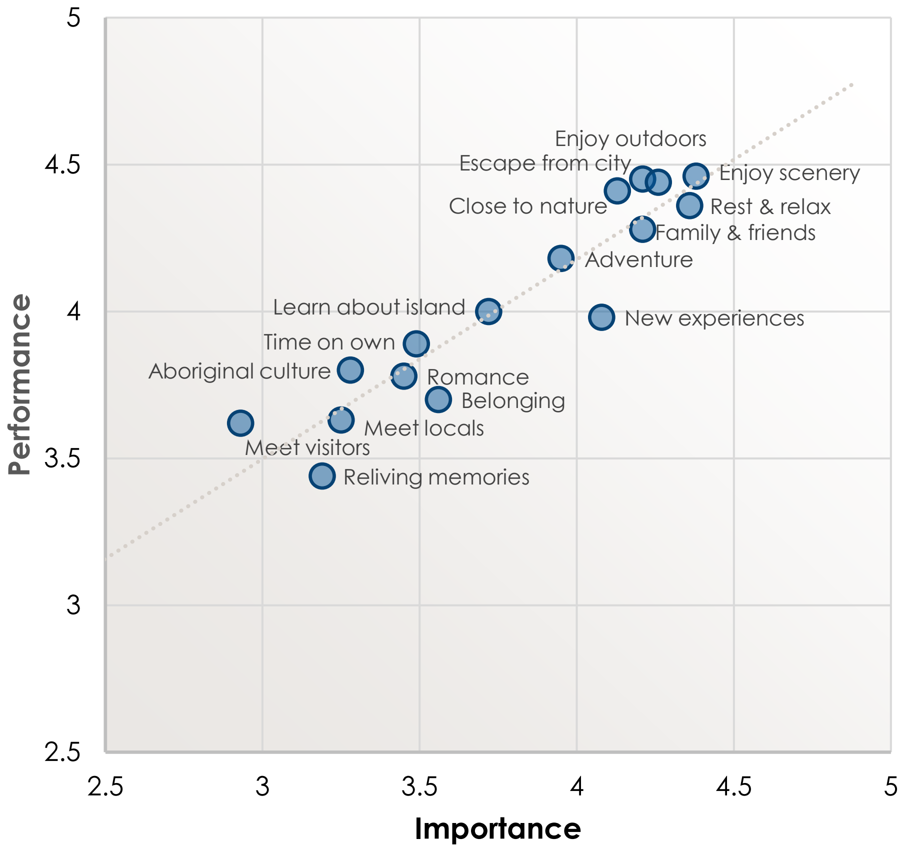


Figure 3. Importance-Performance analysis of potential visitor motives

The overall pattern of the importance-performance analysis for online panellists was also largely consistent with previous rounds. The results indicate that potential visitors have similar motives and perceptions of performance as current visitors, however the need for new experiences, romance and belonging are emphasised more strongly. Addressing these areas of underperformance would improve destination attractiveness and visitor yield.

3.2.5 Reasons for not Visiting

Online Panel respondents who were not intending to visit Minjerribah in the next five years (i.e. non-visitors) were asked to provide reasons for their response. There were a wide range of responses but in general the reasons (shown in Table 16) are consistent with those reported in market research for other destinations (i.e. cost, time, distance, interest).

Table 16. Main reasons for not visiting

Reason	Percentage	Sample Quotes
Too expensive	11.2%	Because you have to pay for the barge and book in advance, not much/ no pet friendly accommodation there. Accommodation expensive. Could do if I win the lottery! The cost of ferry is the main reason. No personal transport and it's costly.
Prefer other destinations	11.8%	Been there lots of times, lots of other places to see. I have other places I want to visit first. I have several other destinations ahead on the list. Just prefer to visit other places at this stage. There are much more interesting places to go.
Accessibility	11.2%	Hard to get there and costly. I don't have a 4 wheel drive and I don't know how to apply to go to the island. It is inconvenient to get there. Not worth the effort of travelling there. Many other places are easier to get to. Too hard to get there for a day trip and that would be all I want to do.
Lack of awareness	10.0%	Don't know enough about the place to add it to my list of possible future places to visit. I have not heard enough about it to make me want to visit. I have been to many other Queensland islands over the years but this island has never been on my radar. I don't know how to get there or what facilities are there.
COVID pandemic	10.0%	Due to COVID, I'm not travelling anywhere. Due to the current climate I will not be taking any holiday. Not sure if I can travel if I am not vaccinated. Unsure of travel options because of COVID. Not willing to travel anywhere outside my state whilst COVID-19 is still around.
Not interested	8.2%	I have no reason to go there specifically. I'm not sure if there is anything on the island that interests me anymore. I used to go camping but don't do that anymore. Not really interested in camping and I don't like beaches. Nothing enticing about it. There is nothing there that attracts me to this location.

Source: Online Survey Panel

Clearly some potential visitors have the impression that the island is not easy to access. This theme also emerged from the non-visitor focus group, where it was clear that participants were confusing North Stradbroke Island (Minjerribah) with other islands. There was also a general lack of awareness amongst non-visitors about where the island was located. Marketing and visitor information needs to emphasise the accessibility of the island using public transport, bicycles and other modes of transport. Perceptions about cost and access can be addressed by emphasising that the island is 'on your doorstep' or 'in your backyard'. Lack of awareness can be addressed through more targeted visitor information (see Information Sources). Concerns related to the COVID-19 pandemic featured prominently in the comments provided by non-visitors. It will be important for the tourism industry address the reluctance of some travellers to travel as the world emerges from the pandemic.

3.2.6 Visitor Spending

Current visitors were asked to estimate how much they spent on various aspects of their trip, while online panellists were asked how much they would be willing to spend. Not surprisingly, the results indicate that accommodation accounts for the highest expenditure (Table 17).

Table 17. Median spend (current visitors) and intended spend (online panel) per stay

	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Getting to the island	$150	$150	$90	$100	$80	$100
Getting around the island	$30	$25	$30	$60	$50	$50
Food and drinks	$100	$130	$100	$200	$200	$200
Shopping	$100	$75	$75	$100	$100	$100
Fuel	-	$50	$50	-	$50	$50
Accommodation	$400	$280	$300	$500	$400	$500
Activities	$30	$20	$75	$100	$100	$100

*Note: Fuel was not included in the round 1 survey. Source: NSI Visitor Survey, Online Panel

Accommodation spending was higher in round 1, primarily because the average length of stay for the sample was longer. Much of the economic benefit of this spending may be lost to the island in cases where accommodation is owned by entities on the mainland. Potential visitors were willing to pay more than current visitors for accommodation, food and drinks, activities and transport around the island.

Further insights can be gained by looking at the average **visitor spend per day** to account for differences in length of stay (current visitors) or intended length of stay (online panellists) (see Table 18 and Table 19).

Table 18. Median current visitor spend per day

	Day Trippers			Overnight Stays		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Getting to the island	$40	$50	$40	$33	$40	$25
Getting around the island	$17	$15	$20	$8	$9	$10
Food and drinks	$40	$35	$50	$40	$33	$43
Shopping	$30	$25	$30	$17	$15	$19
Fuel	-	$25	$28	-	$13	$13
Accommodation	-	-	-	$90	$83	$83
Activities	$18	$40	$50	$7	$20	$20
Total Spend	**$100**	**$120**	**$120**	**$156**	**$172**	**$173**

*Note: Fuel was not included in the round 1 survey. Source: NSI Visitor Survey

The total visitor spend per night for day trippers is broadly consistent with NVS data for Brisbane and Queensland. The spend per visit for overnight visitors is lower than NVS data for Brisbane and Queensland, highlighting that there may be an opportunity to increase yield. Day trippers are likely to spend more per day than overnight visitors in all spending categories. Median spend per day was remarkably consistent for rounds 2 and 3.

Table 19. Median intended visitor spend per day

	Day Trippers			Overnight Stays		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Getting to the island	$40	$25	$38	$17	$17	$17
Getting around the island	$30	$20	$20	$17	$13	$14
Food and drinks	$50	$30	$40	$50	$40	$50
Shopping	$50	$40	$50	$25	$25	$25
Fuel	-	$23	$20	-	$13	$14
Accommodation	-	-	-	$100	$80	$100
Activities	$30	$40	$45	$20	$25	$25
Total Spend	**$195**	**$160**	**$170**	**$234**	**$224**	**$256**

*Note: Fuel was not included in the round 1 survey. Source: NSI Visitor Survey

The results also indicate that potential visitors are willing to spend more per day than current visitors, provided the island can offer dining, shopping, accommodation and activities that are perceived to offer good value.

Visitor spending varies considerably based on family lifecycle stage. These differences in spending are related to different accommodation, dining and activity preferences. Table 20 shows the median spend per day for each family lifecycle group. The results highlight the importance of families, which spend considerably more on accommodation and food.

Table 20. Median current visitors spend per day by family lifecycle

Current Visitors	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Getting to the island	$25	$36	$37	$40	$30	$33	$25
Getting around the island	$13	$13	$10	$20	$17	$10	$10
Food and drinks	$33	$37	$40	$50	$50	$40	$50
Shopping	$16	$17	$16	$25	$20	$16	$20
Fuel	$16	$17	$15	$13	$13	$13	$13
Accommodation	$50	$75	$88	$100	$85	$113	$75
Activities	$20	$20	$42	$25	$17	$19	$25
Total Spend	**$106**	**$158**	**$134**	**$212**	**$192**	**$168**	**$120**

Source: NSI Visitor Survey

An analysis of spend per day by accommodation type indicates that spending was highest for visitors staying in hotels or resorts and holiday rentals (Table 21). Similar results were observed in rounds 1 and 2 of data collection.

Table 21. Median current visitor spend per day by accommodation type

Current Visitors	Camping	Caravan Park	Cabin	Own Property	Hotel or Resort	Holiday Rental	VFR
Getting to the island	$53	$53	$17	$23	$60	$35	$12
Getting around the island	$20	$30	$9	$8	$25	$15	$5
Food and drinks	$50	$30	$67	$27	$100	$63	$30
Shopping	$24	$20	$10	$17	$35	$20	$10
Fuel	$21	$13	$13	$13	$36	$10	$17
Accommodation	$45	$50	$118	$145	$100	$180	$50
Activities	$33	$38	$0	$150	$75	$38	$29
Total Spend	**$210**	**$150**	**$168**	**$75**	**$315**	**$273**	**$54**

Source: NSI Visitor Survey

3.3 Market Origin

The research confirms previous findings indicating that the majority of visitors who provided a postcode (97.5%) originate from Queensland (Table 22). As a result of the COVID-19 pandemic, the proportion of international visitors (2.0%) was lower than previous rounds. While Australia's borders were closed for the entire survey period, international responses came mainly from foreign workers and students who remained in Australia during the pandemic.

Table 22. Domestic and international source markets

	Round 1	Round 2	Round 3
	n=633	n=808	n=609
Domestic	**93.2%**	**95.5%**	**98.0%**
Queensland	89.3%	90.7%	97.5%
New South Wales	8.1%	7.6%	1.4%
Victoria	1.5%	1.2%	0.8%
Western Australia	0.4%	0.4%	0.0%
Tasmania	0.4%	0.2%	0.0%
South Australia	0.0%	0.0%	0.2%
Northern Territory	0.2%	0.0%	0.0%
International	**6.8%**	**4.5%**	**2.0%**

Source: NSI Visitor Survey

Given the island is conveniently located next to Queensland's major international gateway, there is an opportunity to increase the share of international visitors as the world emerges from the global pandemic. The CSIRO (2013) identified the 'Orient Express' of Asian visitors as a major opportunity for Queensland Tourism. Research by Tourism Research Australia (2018) indicates that Chinese visitors are interested in beaches and natural attractions. However, the current geopolitical environment is likely to dampen the growth in Chinese visitors. Anecdotally, the experiences offered on Minjerribah appear to appeal more to traditional North American and European markets.

Although an analysis of origin by state and country is useful, state borders are relatively arbitrary. An analysis of **postcodes** reveals that domestic source markets are concentrated mainly around Southeast Queensland (see Table 23).

Table 23. Domestic visitor origin by proximity

	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
50km Radius	76.9%	72.6%	74.1%	46.9%	36.7%	49.6%
100km Radius	9.2%	11.7%	15.2%	22.5%	26.8%	17.8%
200km Radius	4.3%	8.7%	2.5%	10.8%	14.8%	6.8%
Rest of Queensland	2.4%	3.3%	6.0%	1.7%	1.4%	2.8%
Rest of New South Wales	4.7%	1.9%	1.2%	4.9%	1.1%	0.3%
Victoria	1.5%	1.2%	0.8%	7.1%	7.2%	12.3%
South Australia	-	-	0.2%	1.7%	3.8%	4.2%
Western Australia	0.4%	0.4%	-	2.0%	3.4%	4.8%
Tasmania	0.4%	0.2%	-	0.7%	2.9%	1.2%
Australian Capital Territory	-	-	-	1.0%	-	-
Northern Territory	0.2%	-	-	0.2%	2.0%	-

Source: NSI Visitor Survey, Online Survey Panel

The results highlight that a considerable proportion (74.1%) of current domestic visitors come from within a **50km radius** of Dunwich. Potential visitors were more dispersed, indicating untapped demand outside the immediate catchment for current visitors - although it should be noted that these proportions are also an artifact of the online panel that was employed for data collection.

The analysis also reveals that the top postcodes are concentrated in Brisbane and Redland City (Table 24 and Figure 4). There are seven clear **postcode clusters** that together represent more than 43% of all domestic visitors.

Table 24. Top postcode clusters for current visitors

Regions	Top Postcodes	Frequency	Percent
Redlands	4157, 4159, 4160, 4161, 4163, 4164, 4165	55	9.0%
Inner Brisbane	4000, 4005, 4101, 4169	44	7.1%
Southern Inner Brisbane	4105, 4151, 4152, 4170	43	6.6%
Northwest Outer Brisbane	4012, 4053, 4055, 4068, 4069, 4074	40	7.2%
Logan City	4123, 4127, 4128, 4207	34	3.8%
Northwest Inner Brisbane	4051, 4059, 4065, 4066	23	3.9%
Southern Outer Brisbane	4109, 4115, 4121, 4122	24	5.6%
Total		**263**	**43.2%**

Source: NSI Visitor Survey

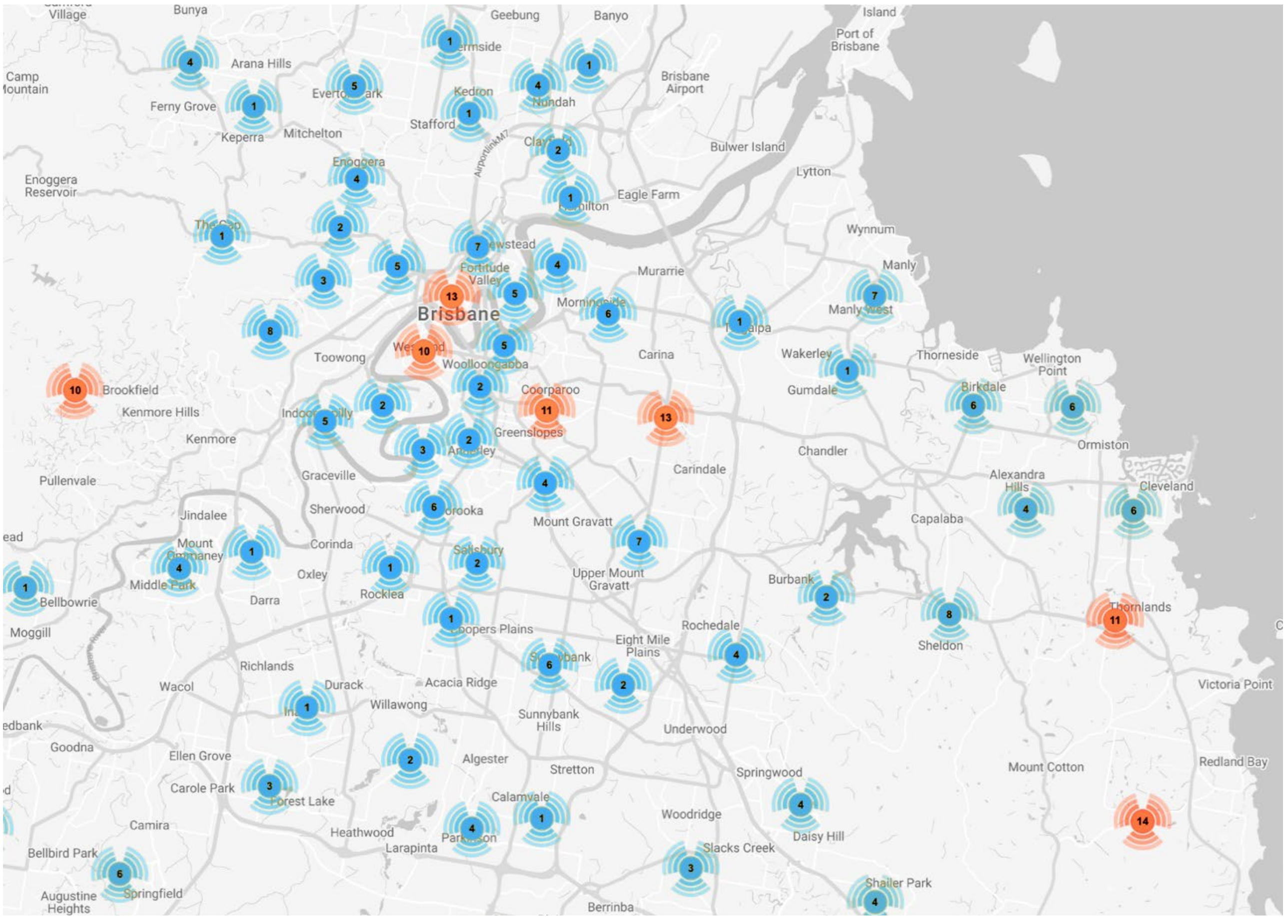


Figure 4. Southeast Queensland postcode cluster map

Geographically, the island is most accessible from the Redlands bayside suburbs and it was not surprising to see 9% of visitors originating from these suburbs. The next four clusters represent higher income suburbs in Inner Brisbane and outer suburbs in Southern and Northwest Brisbane. A cluster map of the most common postcodes highlights a higher proportion of visitors (red clusters) in suburbs from Redland Bay, through to Inner Brisbane and out to the Western Suburbs.

As noted in the previous reports, this analysis highlights significant opportunities to attract domestic visitors from further afield. 3.7 million Australians live within 200km of the island, including the major population growth centres of Greater Brisbane (pop. 2.36 million), the Sunshine Coast (357,000), Gold Coast (592,000), Toowoomba (153,000) and the Northern Rivers (NSW) (245,000). This area is very significant because it represents the third largest population catchment in Australia and is experiencing rapid population growth (Table 25).

Table 25. Population catchment within 200km of Minjerribah

Statistical Area	Population	Median Income	Median Age
Brisbane East	230,746	$49,947	38.9
Brisbane North	214,404	$52,637	35.7
Brisbane South	356,666	$47,744	33.1
Brisbane West	187,137	$53,617	34.3
Brisbane Inner City	265,256	$51,913	32.9
Gold Coast	591,570	$42,115	37.4
Ipswich	333,748	$46,963	33.3
Logan-Beaudesert	328,027	$45,528	33.4
Moreton Bay North	242,629	$43,413	39.3
Moreton Bay South	201,628	$51,194	34.1
Sunshine Coast	357,422	$40,433	42.3
Toowoomba	153,201	$44,964	35.3
Richmond-Tweed	245,164	$37,821	44.5
TOTAL	**3,707,598**	**$46,023**	**36.6**

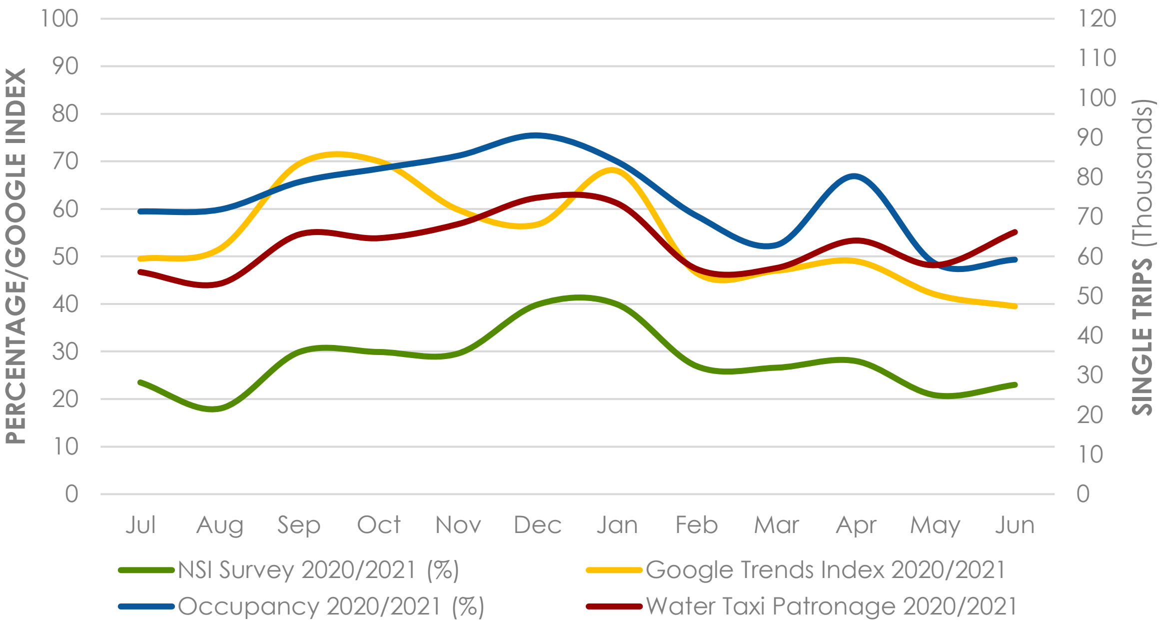
Source: Australian Bureau of Statistics (2018)

This area is likely to be the core population catchment for future visitors to Minjerribah and increasing urbanisation is likely to increase demand for the types of nature-based experiences offered by the island. There are considerable opportunities to create tourism products and services that will and tap into the latent demand in the local region.

3.4 Seasonality

Several **seasonality indicators** were collected to understand variations in demand throughout 2020-2021. These data sources include ferry patronage, accommodation occupancy, Google Trends data and responses from repeat visitors on the NSI Visitor Survey (Figure 5). It should be noted that COVID-19 travel restrictions and lock downs impacted significantly on some of these indicators and the patterns reported in previous reports are likely to provide a more accurate summary of seasonality.

Minjerribah offers a wide range of accommodation options including hotels, rental apartments and beach houses, bed & breakfasts, backpacker accommodation as well as caravan and camping sites (Straddie Chamber of Commerce, 2015). AirDNA data provided by the Straddie Chamber of Commerce indicates that 2020/2021 average **occupancy rates** ranged from a high of 75.5% in December 2020 to a low of 52.4% in March 2021. It should be noted that the supply of holiday rental accommodation varied considerably during this period as owners were more likely to use their own properties, significantly reducing the supply of holiday rental nights. As a result, occupancy rates for Minjerribah were generally higher than the average monthly occupancy rates for Queensland, which ranged between 45.1% and 64.4% for the period from July 2020 to June 2021.



Sources: TMR/Translink, Google Trends, Straddie Chamber of Commerce, NSI Visitor Survey (2021)

Figure 5. Seasonality indicators (2020/2021)

Overall, occupancy rates for accommodation providers follow a similar seasonal pattern to ferry patronage, especially for holiday seasons such as Easter and Christmas. Although the various indicators are measured on different scales, the overall seasonality pattern is relatively consistent across all data sources. Despite the COVID-19 pandemic, the data point to a market that is highly sensitive to Easter, Spring and Summer holiday periods.

Further analysis of **water taxi patronage** from 2015 to 2021 (Figure 6) indicates that peak periods occur in late September/early October and late December/early January. The autumn peak moves between March and April depending on the timing of Easter holidays. It is interesting to note the significant decrease in water taxi patronage between April and July 2020 and promising signs of recovery for September 2021.

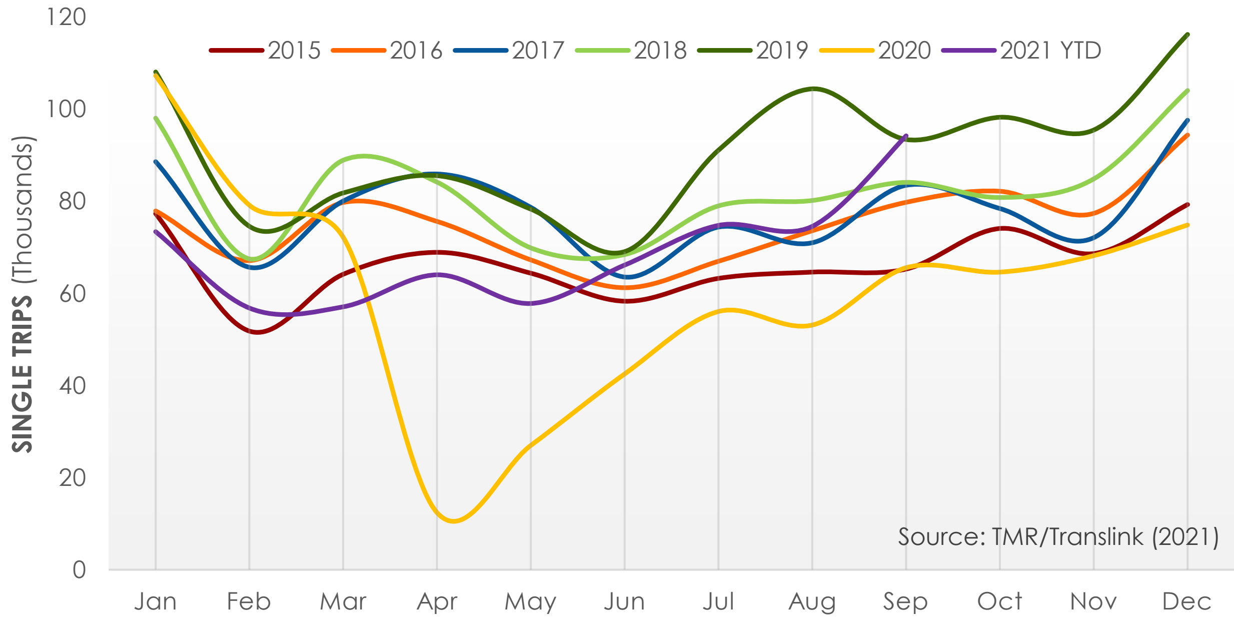
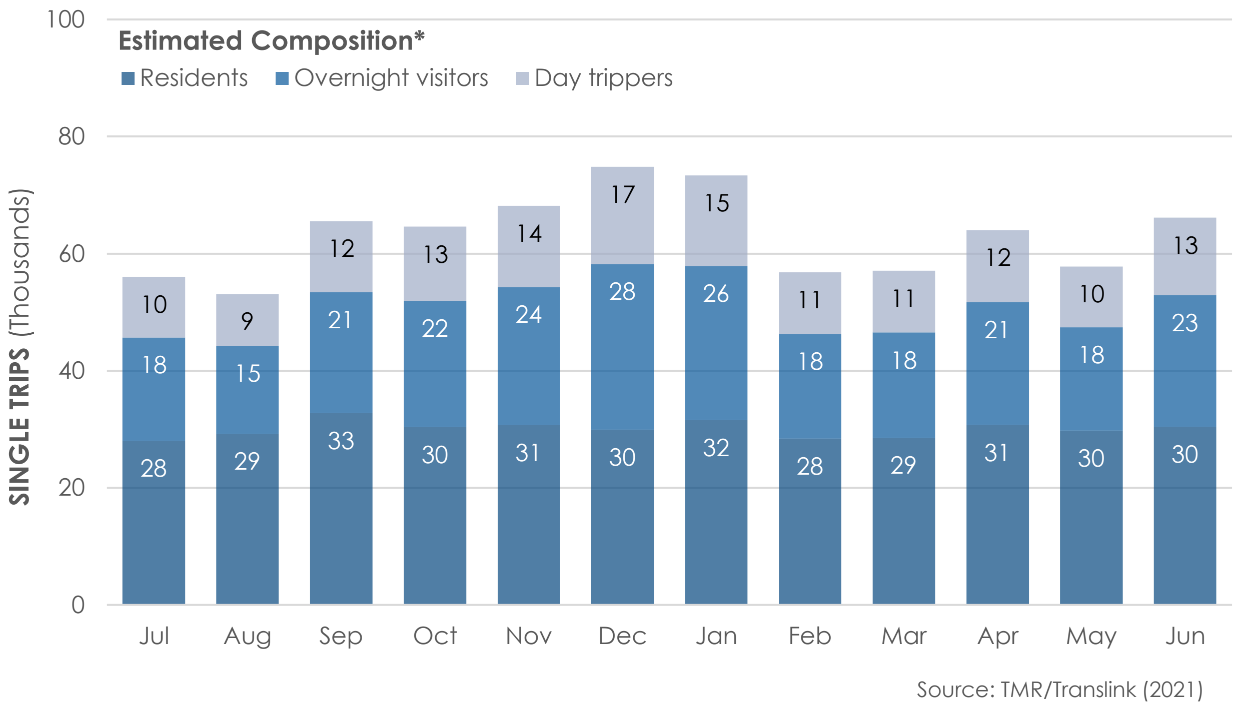


Figure 6. Seasonality analysis of water taxi patronage (2015-2021)

We have modelled the composition of water taxi patronage for each month based on screening questions to identify visitors during the survey work. Figure 7 shows actual monthly water taxi patronage with composition estimates based on our observations and as well as accommodation occupancy data.



***Note:** Monthly totals based on actual data. Composition estimated based on occupancy data and survey responses.

Figure 7. Monthly water taxi patronage with estimated composition (2020/2021)

Economic benefits can be enhanced by increasing visitation in off-peak periods, particularly in February, May and June. Strategies to diversify the market in order to smooth out seasonal peaks and troughs should consider target markets that are looking for experiences outside school holidays. Examples include international visitors, cruise passengers, group and education tours, young couples and retirees.

Table 26 indicates that visitors in some family lifecycle stages are less sensitive to seasonal variations. Events also provide an opportunity to increase visitation in off-peak periods, particularly if they attract day trippers. Developing a wider range of non-water-based activities would attract more visitors during the cooler months.

Table 26. Seasonality by family lifecycle

Current Visitors	J	F	M	A	M	J	J	A	S	O	N	D
Young Singles	24%	22%	24%	20%	24%	27%	24%	14%	17%	20%	19%	21%
Couples	9%	10%	13%	10%	17%	11%	7%	13%	9%	11%	14%	9%
Full Nest I	4%	7%	6%	10%	3%	8%	6%	10%	9%	9%	6%	7%
Full Nest II	18%	15%	17%	17%	16%	10%	20%	18%	17%	16%	16%	14%
Full Nest III	22%	17%	12%	22%	17%	14%	19%	16%	24%	19%	21%	24%
Empty Nest	15%	22%	23%	12%	17%	23%	19%	22%	17%	20%	18%	15%
Older Singles	9%	8%	4%	9%	6%	8%	6%	8%	7%	5%	6%	10%

Source: NSI Visitor Survey

An analysis of the **Google Trends** data for Australia further confirms the patterns observed above (Figure 8). Google Trends data is a good measure of online interest in the destination. Although some online searches may not be related to tourism, many recent destination studies have demonstrated a strong correlation between online search activity and visitation. The impact of the COVID-19 pandemic on online search behaviour is evident for the 2020 data. The 2021 data show a return to more normal search activity.

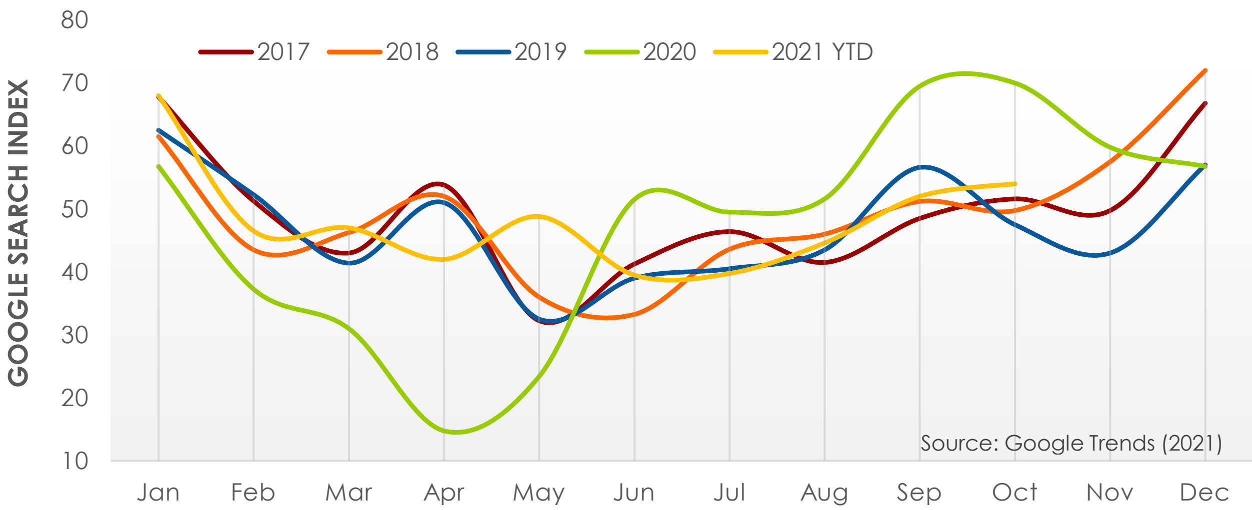


Figure 8. Seasonality analysis of Google Trends data (2017-2021)

Google Trends data also allows for benchmarking against other destination search terms. Figure 9 demonstrates that the seasonal variations identified above are also evident in search activity for other southern Queensland island destinations. There are clear peaks at Easter, Spring and Summer holiday periods. Although the overall pattern is the same, the search indices for Fraser Island and Bribie Island are higher, indicating a higher level of online interest. Trend analysis over five years indicates an increase in search activity for Bribie, while searches for the other islands have declined slightly as a result of COVID-19 travel restrictions in 2020 and 2021.

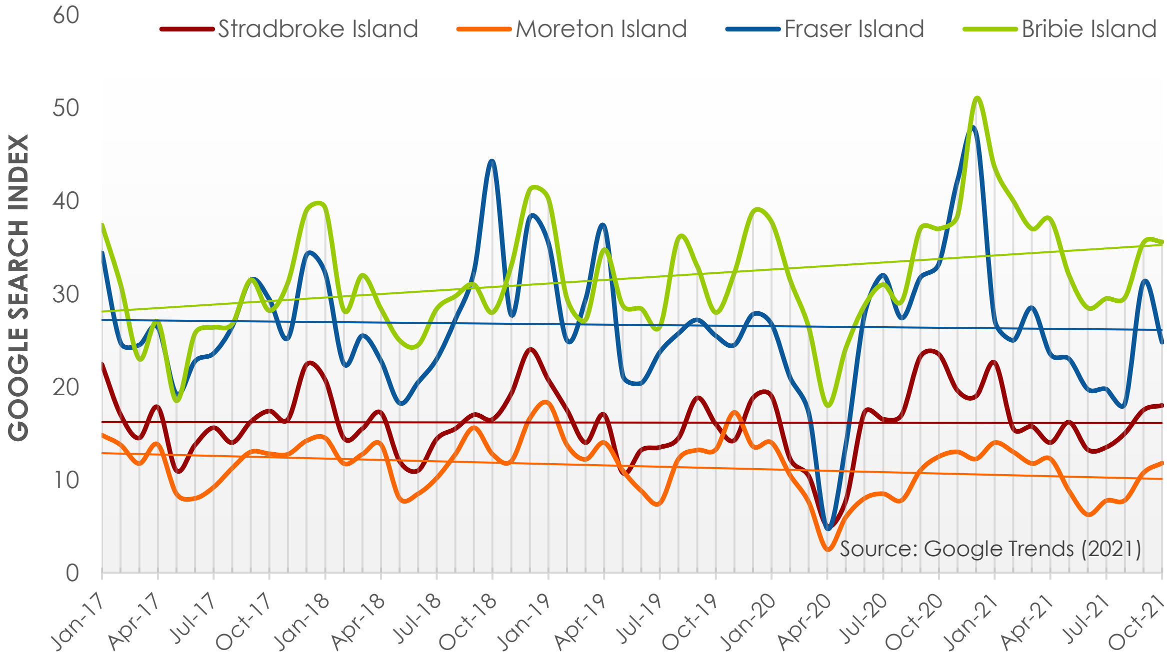


Figure 9. Seasonality analysis of benchmark destinations

3.5 Destination Awareness

3.5.1 Destination Familiarity

Potential visitors were asked whether they had heard of North Stradbroke Island (Table 27). Only 7.6% of potential visitors indicated that they had never heard of North Stradbroke Island (Minjerribah), indicating a high level of general awareness. However, responses to other questions and the focus group discussions with non-visitors highlighted that ongoing confusion in the marketplace between North Stradbroke Island (Minjerribah), South Stradbroke Island and Moreton Island (Moorgumpin). Differentiating the islands of Moreton Bay should therefore be a focus of any marketing campaigns for the region. Not surprisingly, familiarity with the destination was higher in Queensland and declined for potential visitors from other states. It is vital to increase awareness of NSI in local, interstate and international markets.

Table 27. Familiarity and past visits to Minjerribah

Online Panel	QLD	NSW	VIC	SA	WA	Other	Total
No, never heard of it	1.4%	-	34.2%	3.7%	41.9%	10.0%	7.6%
No, but I've heard of it	40.9%	-	51.9%	74.1%	54.8%	60.0%	44.5%
Yes, once before	27.9%	-	10.1%	11.1%	3.2%	10.0%	23.6%
Yes, 2 to 5 times	21.4%	-	2.5%	11.1%	-	10.0%	17.4%
More than 5 times	8.4%	100%	1.3%	-	-	10.0%	8.0%

Source: Online Survey Panel

To better understand market perceptions of the destination, online panellists who had heard of the island were asked to list any attractions or places that came to mind when they thought of NSI. Figure 10 provides a visual summary of the most frequently mentioned terms. The size of each word indicates how often the word was mentioned (colours are purely for aesthetic purposes and have no additional meaning). Larger words were mentioned considerably more often than smaller words.

Figure 10. Destination attractions listed by online panellists

Beaches were mentioned most often, followed by specific locations such as Point Lookout, Amity Beach, Cylinder Beach, Blue Lake, Brown Lake and Adder Rock. Walking and bicycle trails, including the North Gorge Walk were also mentioned by a number of panellists. The term 'watch' refers to comments about watching whales, dolphins and wildlife. Interestingly, Tangalooma Resort (on Moreton Island) was also mentioned by a number of panellists, perhaps reflecting some confusion between the two major Moreton Bay islands.

Online panellists were asked to select images they identified with the island from a collection of nine photos (Figure 11). Many (71%) of potential visitors did not associate any of the images with Minjerribah, indicating low general awareness of key destination attributes. 5.4% of potential visitors only selected one image, while 18.9% were able to identify between two to five images. The three most frequently selected images were related to beach and ocean themes.

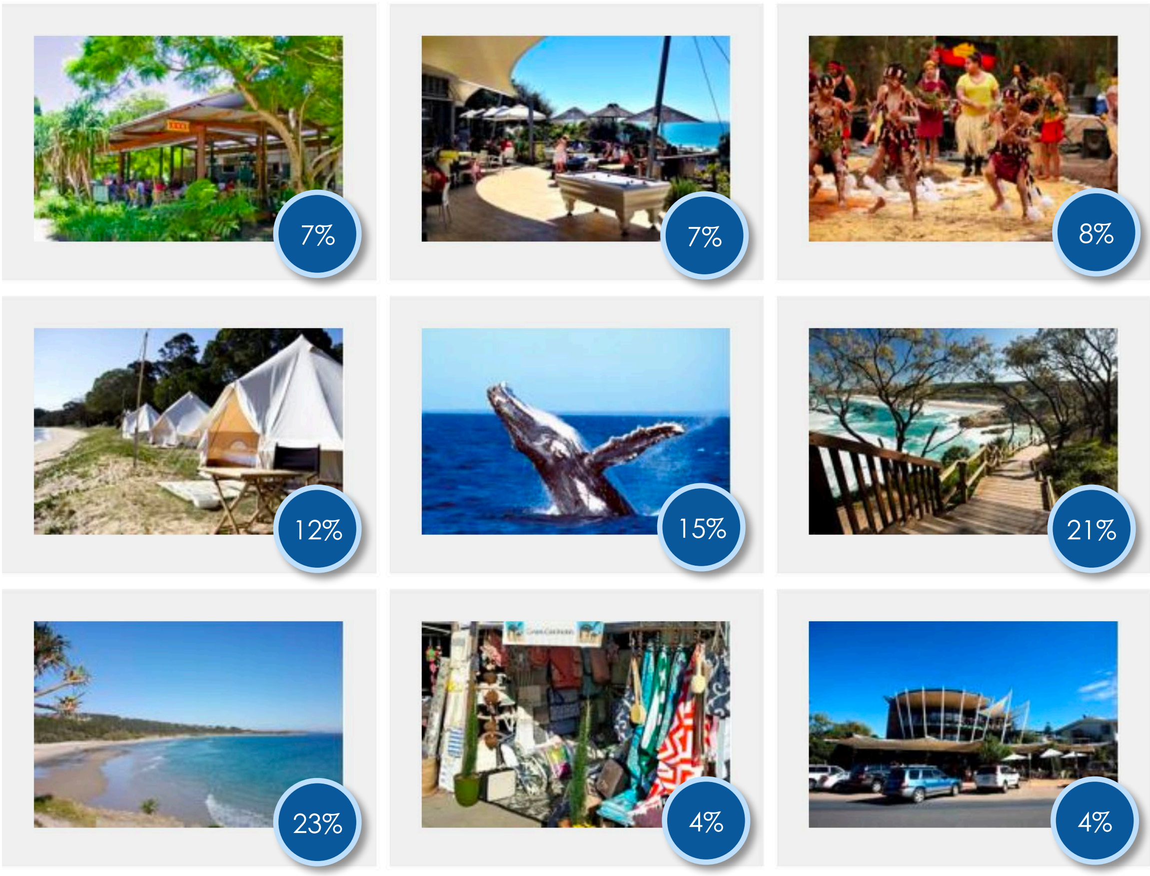


Figure 11. Identification of Minjerribah images

The analysis highlights that potential visitors are more likely to associate the destination with beach and water activities. If this aligns with future ambitions then marketing campaigns should reinforce this association through use of beach and ocean imagery. However, marketing effort could also be directed at shifting consumer perceptions to emphasise other aspects (e.g. markets, wildlife, indigenous experiences).

3.5.2 Destination Sentiment

Current visitors were asked whether they planned to return to Minjerribah, while online panellists were asked to indicate whether they intended to visit Minjerribah in the future. The results in Table 28 indicate that Minjerribah has a very high rate of **return/intended visitation**. Round 3 results were largely consistent with those from round 1 and round 2, but 10.4% of day trippers indicated that they did not intend to return to Minjerribah. Further analysis revealed that most of these visitors were visiting the island for the first time.

Table 28. Current visitor intentions

	Round 1		Round 2		Round 3	
	Day Trippers	Overnight Stays	Day Trippers	Overnight Stays	Day Trippers	Overnight Stays
Current Visitors	n=232	n=392	n=264	n=551	n=230	n=375
No	0.0%	0.0%	0.0%	0.4%	10.4%	2.9%
Not sure	4.3%	3.6%	3.8%	2.4%	2.6%	1.3%
Yes, within 12 months	71.6%	76.8%	74.2%	80.0%	64.8%	66.4%
Yes, within 5 years	8.2%	11.7%	9.8%	10.5%	11.7%	19.7%
Yes, not sure when	15.9%	7.7%	12.1%	6.7%	10.4%	9.6%
Online Panel	n=36	n=373	n=42	n=614	n=34	n=523
No	6.0%		7.6%		6.7%	
Not sure	47.2%	26.8%	40.5%	23.0%	41.2%	22.0%
Yes, within 12 months	11.1%	27.9%	21.4%	30.1%	14.7%	32.9%
Yes, within 5 years	16.7%	16.1%	11.9%	21.0%	20.6%	21.2%
Yes, not sure when	25.0%	29.2%	26.2%	25.9%	23.5%	23.9%

Source: NSI Visitor Survey, Online Survey Panel

The online panel results shown in Table 28 only includes participants who indicated that they were planning to visit the island in the future. However, only 6.7% of online panellists indicated that they did not plan to visit Minjerribah.

Both current and potential visitors were asked to rate how they perceived Minjerribah as a tourist destination. Current visitors were overwhelmingly positive in their evaluation of the Minjerribah, particularly as one of Australia's best beach, island and nature-based destinations (Table 29).

Table 29. Current visitor perceptions and satisfaction

Current Visitors	Round 1	Round 2	Round 3	Change
One of Australia's best beach destinations	5.99	5.90	5.51	-0.39
One of Australia's best island destinations	5.91	5.67	5.42	-0.25
One of Australia's best nature-based destinations	5.81	5.75	5.51	-0.24
One of Australia's best kept secrets	5.78	5.58	5.30	-0.28
One of Australia's best wildlife destinations	5.54	5.57	5.32	-0.25
Offers unique experiences	5.38	5.44	5.13	-0.31
Offers many attractions and activities	5.27	5.36	5.03	-0.33
Rich in Aboriginal culture	4.95	5.00	4.93	-0.07
Would buy NSI products if available at home	4.83	4.69	4.69	0.00
Would order island products online	3.76	3.72	3.86	0.14
Would recommend to family & friends	6.53	6.46	6.08	-0.38
Would visit island again	6.59	6.58	6.16	-0.42
Overall satisfied with NSI visit	6.40	6.36	6.01	-0.35

Mean based on 1=Strongly Disagree … 7=Strongly Agree. Source: NSI Visitor Survey

However, the round 3 ratings show a concerning decline in mean ratings for most items. Further analysis revealed that the ratings of first-time visitors were significantly lower than repeat visitors for most items. The round 3 sample included a larger number of first-time visitors and it appears these visitors were less impressed with the visitor experience.

A more detailed distribution of responses to each item is shown in Figure 12. These distributions indicate a high level of satisfaction with the destination from current visitors.

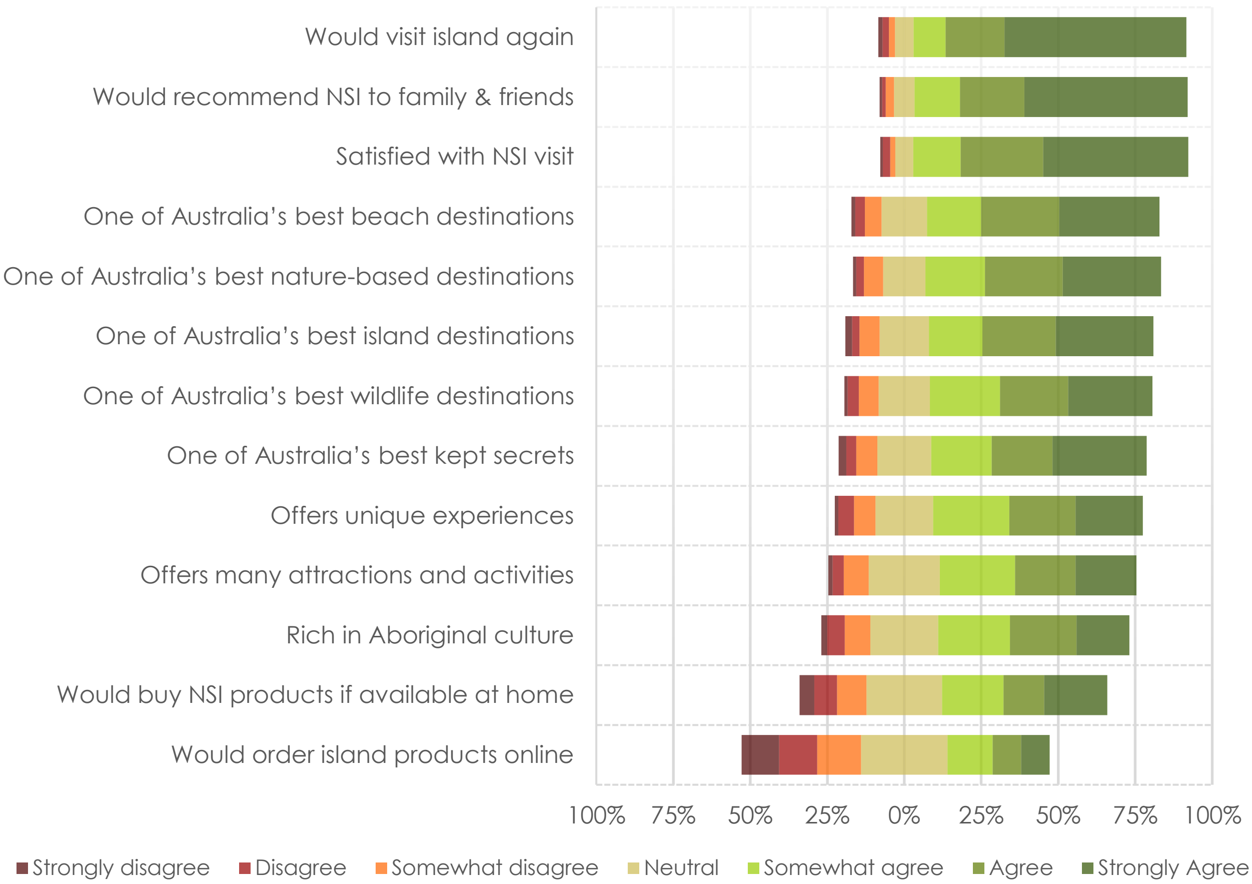


Figure 12. Current visitor perceptions and satisfaction with Minjerribah

The perception question included two items about purchasing island products. The results indicate that there is a growing interest in purchasing island products online. Many successful destinations offer local products that become part of the destination brand. For example, the 100% Pure New Zealand brand has successfully translated to 100% Pure NZ Honey. Similarly, destinations such as King Island, Kangaroo Island and Byron Bay are well known for their local products, which are sold in major supermarket chains across the country. Other destinations offer niche or boutique products for sale online. An example is the recent success of Noosa Chocolates. There is considerable scope to develop local "Straddie" or "Minjerribah" branded products that may over time become sought after retail items that reinforce the unique brand attributes of the island. This would create further employment opportunities for locals on the island. However, the results indicate that current market support is still weak, possibly because the island does not offer distinctive or unique local products, or visitors are not aware of these.

The perceptions of online panellists were slightly less positive, with mean ratings declining for most items, but the findings still indicate a very positive overall response (Table 30). There was a greater interest in purchasing products from Minjerribah.

Table 30. Online Panel perceptions and satisfaction

Online Panel	Round 1	Round 2	Round 3	Change
One of Australia's best beach destinations	4.95	5.04	4.96	-0.08
One of Australia's best island destinations	4.97	5.01	4.90	-0.11
One of Australia's best nature-based destinations	5.16	5.17	5.04	-0.13
One of Australia's best kept secrets	4.91	5.06	4.98	-0.08
One of Australia's best wildlife destinations	4.78	4.89	4.83	-0.06
Offers unique experiences	5.06	5.02	4.96	-0.06
Offers many attractions and activities	4.88	4.82	4.75	-0.07
Rich in Aboriginal culture	4.77	4.83	4.87	0.04
Would buy NSI products if available at home	4.28	4.12	4.48	0.36
Would order island products online	3.63	3.54	3.92	0.38
I would like to visit North Stradbroke Island	5.67	5.87	5.55	-0.32
Overall impression is positive	5.53	5.64	5.47	-0.17

Mean based on 1=Strongly Disagree … 7=Strongly Agree. Source: Online Survey Panel

The distribution of responses in Figure 13 also show that online panellists have generally favourable impressions of the destination.

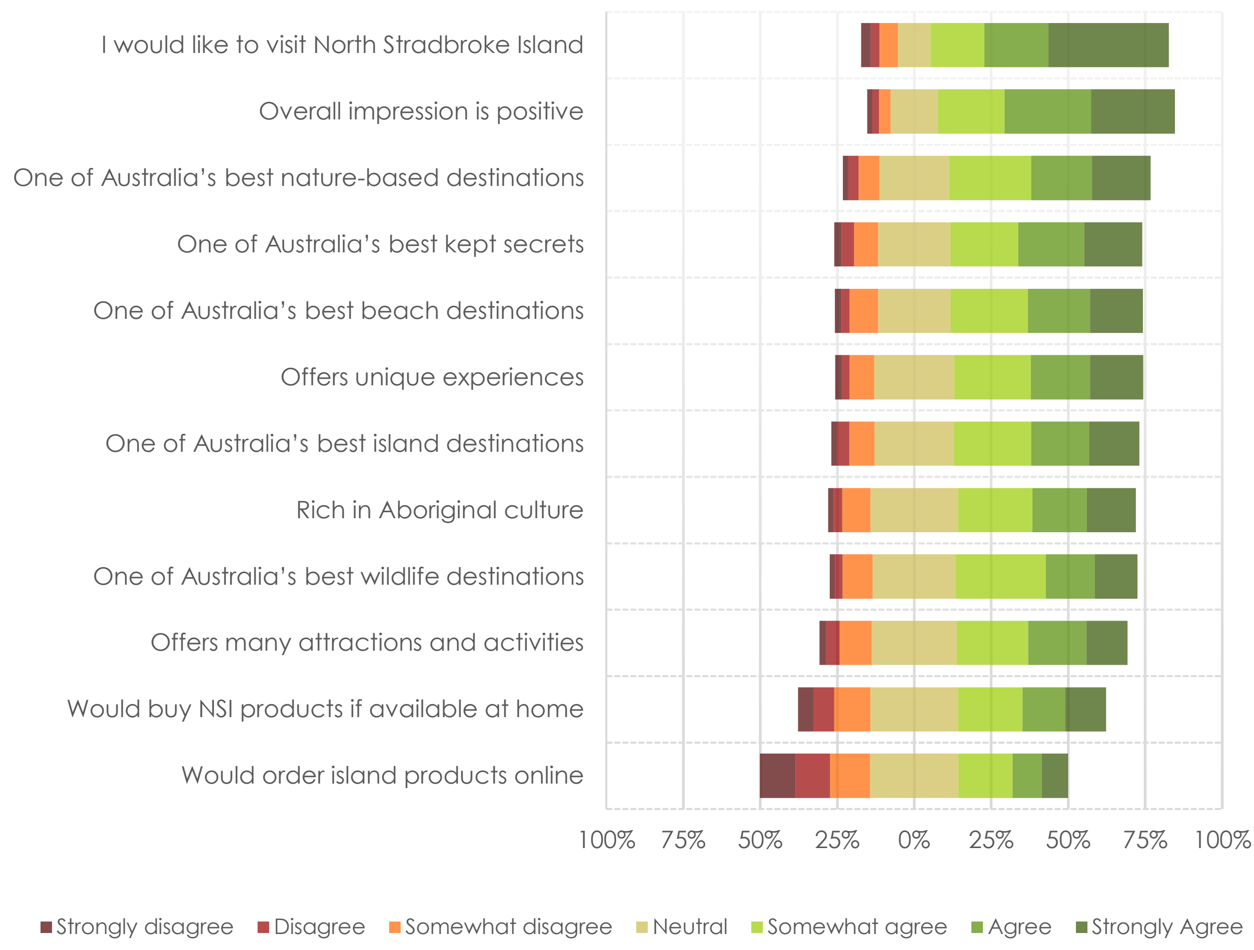


Figure 13. Online panel perceptions and impressions about Minjerribah

3.5.3 Destination Attributes

Three main data sources (NSI Visitor Survey, Online Survey Panel, focus group interviews) were used to better understand how current visitors and potential visitors perceive the island. Potential visitors were asked to provide three words or phrases that they would use to describe the island (Figure 14).

Figure 14. 'Top of mind' destination attributes for potential visitors

The word cloud suggests that the island is largely associated with positive attributes. Dominant destination attributes included beautiful/scenic/pretty, relaxing, calm/serene/tranquil/peaceful, unspoilt/pristine/untouched, fun, sandy and natural. Many respondents also described the island as a 'tropical' destination. There were some references to the island being 'secluded'. Responses to this question were very similar to the findings in previous rounds.

Potential visitors were also asked to provide three words or phrases to describe the typical visitor to the island (Figure 15). The word cloud highlights that Minjerribah is perceived by potential visitors as an adventurous destination that would attract Queensland families, couples, campers, nature/beach lovers, fishermen, surfers, backpackers, 'bogans' and locals.

Figure 15. Potential visitors' descriptions of the 'typical' Minjerribah visitors

Current visitors were asked to describe the two best things about their visit to Minjerribah (Figure 16). Current visitors were more likely to use terms such as ‘walks’, ‘wildlife’, ‘whales’ and ‘beaches’. Current visitors showed greater awareness of specific attractions and locations such as North Gorge Walk, Cylinder Beach, Pt Lookout, Brown Lake and Blue Lake and the Island Vibe Festival. Adjectives such as relaxing, beautiful, quiet and peaceful were commonly used.

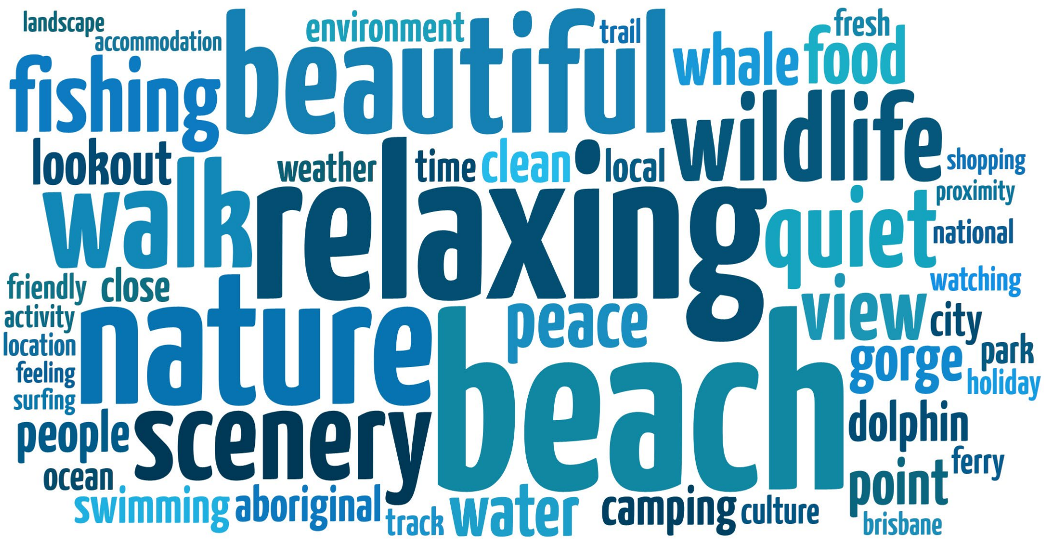


Figure 16. Positive destination attributes for current visitors

In the focus groups, the perceptions of non-visitors were dominated by beaches, camping, walking trails and whales. Some participants confused Stradbroke Island with Fraser Island: “If I’m not mistaken, this is the one that has been dingos on the island, so you should not camp there.” Awareness of major towns, distinctive features, annual events and festivals, shops, restaurants and indigenous presence was low. For example: “I thought that it is just an island. … I didn't think that it has a lot of development and activities … and the beaches are not very different to other beaches.” Many non-visitor focus group participants thought that camping was the sole accommodation option and that they would need a car to get around. Awareness of tourist facilities, public transport, and water taxi/ferry services was also minimal.

In contrast, participants in the past visitor focus group mentioned the convenient location, water-based activities such as whale watching, fishing, swimming and diving as well as nature-based activities like bushwalks and spotting koalas and kangaroos. For example: “It's so cool that you can be walking and there can be wallabies everywhere and there's dolphins swimming past you and there's so many birds and koalas - and it's just out there!” Participants also mentioned the well-packaged indigenous experiences. The comparison of visitor and non-visitor perceptions highlights opportunities to develop marketing strategies to shift the destination image of the island. For non-visitors, there is a need to more clearly promote wildlife and land-based recreation opportunities and attractions. For both groups, promotional activities could be used to create greater awareness of whale watching and indigenous tourism experiences.

To further explore perceptions of destination attributes, current visitors were asked to rate how important various destination attributes were to their decision to visit Minjerribah (1=Not at all important … 5=Very important). Potential visitors were asked to rate how important various attributes were to them when choosing a holiday. Both current and potential visitors were then asked to rate how well they felt Minjerribah performed (1=Very poor…5=Exceptional) against each item. Respondents were able to select 'Not Sure' if they were not able to evaluate an item and these responses were excluded from the analysis.

The resulting **importance-performance analysis** for current and potential visitors are presented in Figure 17 (current visitors) and Figure 18 (potential visitors). Rather than presenting a traditional performance-importance grid, we suggest focussing on attributes below the line and above 3.0 on the importance scale. The attributes included in both surveys can be grouped into hospitality attributes, local culture/products, infrastructure provision and management, camping/fishing, cost/convenience, land-based attractions and water-based attractions.

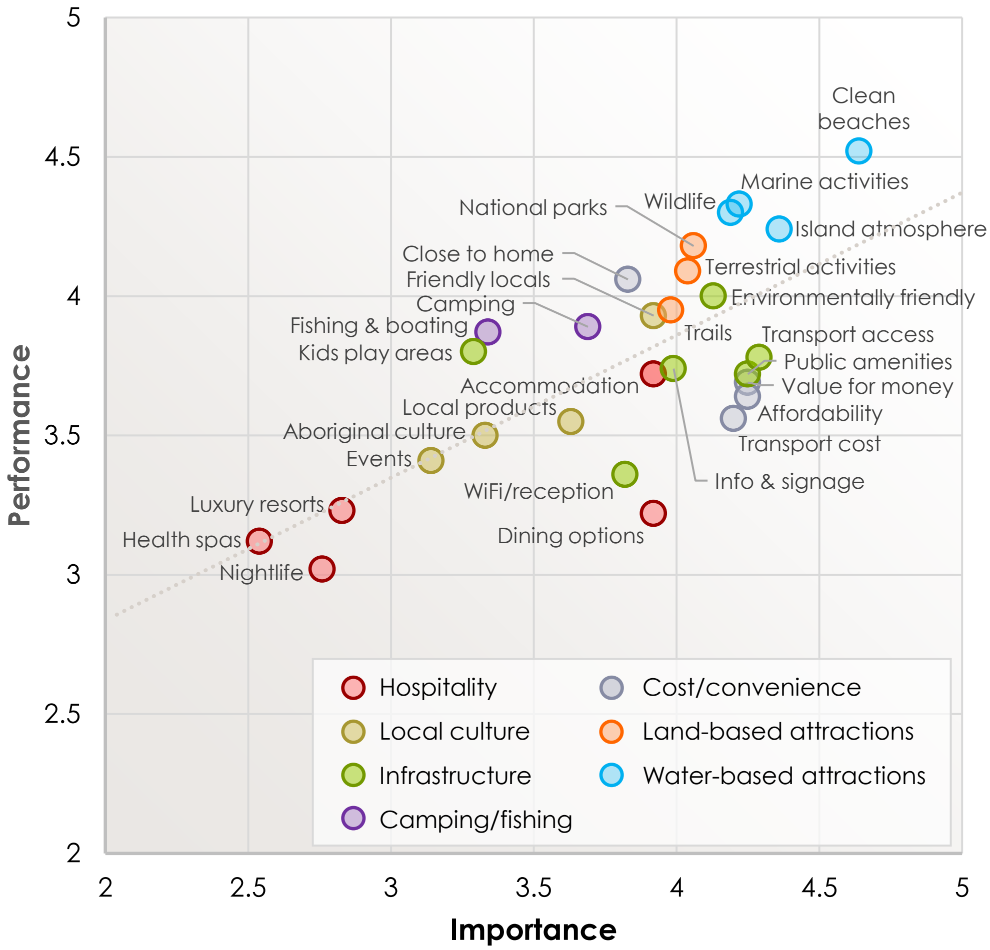


Figure 17. IPA analysis of destination attributes for current visitors

The results are very similar to the findings from previous rounds of data collection. Figure 17 shows that most of the infrastructure and convenience/cost items can be improved. Improving **Wi-Fi access** and mobile phone coverage should be an immediate priority, given that most visitors access information on their smartphone when on the island (see Information Sources). It is now common for many destinations to provide free Wi-Fi in major tourist areas. Free Wi-Fi hotspots have two main benefits: (i) they increase visitor spend and benefit local businesses by making it easier for visitors to find information about activities, dining and experiences; and (ii) they promote electronic word-of-mouth by making it considerably easier for visitors to share their experiences on social media. This is particularly the case when free Wi-Fi is combined with an active strategy to encourage visitors to share photos through the use of ‘selfie spots’ or Snapchat filters. While several Minjerribah businesses offer free Wi-Fi, there is an opportunity for better coverage at key tourist sites and attractions. Other infrastructure attributes requiring attention are information/signage and public amenities such as public toilets, showers and park infrastructure.

The importance-performance analysis also highlights affordability, value for money and transport costs as major issues for current visitors. However, given that average visitor spending is consistent with other Southeast Queensland destinations (see Visitor Spending), these findings are more likely due to perceptions about **value for money**. Our conversations in focus groups also revealed that when visitors say the island is ‘expensive’, they actually mean that it does not deliver good value compared with other nearby destinations. Rather than lowering prices, the results suggest a need for island stakeholders to identify ways in which the island experience can be enhanced so the value proposition is more attractive. Current visitors also identified a **variety of places to eat** (dining options) as an important attribute that was under-performing. While food may not be a primary attractor to the island, it becomes important once visitors are there. Offering a variety of dining options is particularly important for families and longer stay visitors. The lack of quality dining options was identified in all three rounds of surveys, focus groups and analysis of TripAdvisor data (see Food and Dining).

Despite the cancellation of many festivals and **events** on the island, this was not identified as an area for improvement. The results highlight that the island excels in **marine** attributes, such as clean beaches, marine activities (e.g. swimming, surfing) and island atmosphere. The ability to see birds, marine life and **wildlife**, **national parks** and terrestrial (land-based) activities are also a highlight. This aligns well with the aspiration to “utilise the island’s ecological values as a key attraction to residents and visitors” (Department of State Development, 2016). The CSIRO (2013) observes that in a world where ecological habitats are disappearing, the unique natural assets of Queensland will become a stronger drawcard. However, as the Redland City Council (2014) notes, the challenge for the Redlands is that most Australian destinations offer attractive nature-based experiences. Minjerribah stakeholders therefore need to consider how the profile of the island can be raised in the minds of potential visitors. At the same time, the natural assets of Minjerribah will need to be carefully managed and nurtured as any loss in amenity is likely to impact on visitor satisfaction.

The results from the Online Panel identified **water-based** and **land-based** attractions as attributes that were positively evaluated by potential visitors (Figure 18). Similar to previous rounds, Wi-Fi, transport, dining options and convenience/cost were identified by online panellists as areas for improvement. However, potential visitors also rated **events** as more important but performing lower than current visitors. In general, all of the **hospitality** attributes were perceived to be under performing, relative to the importance placed on these attributes by potential visitors.

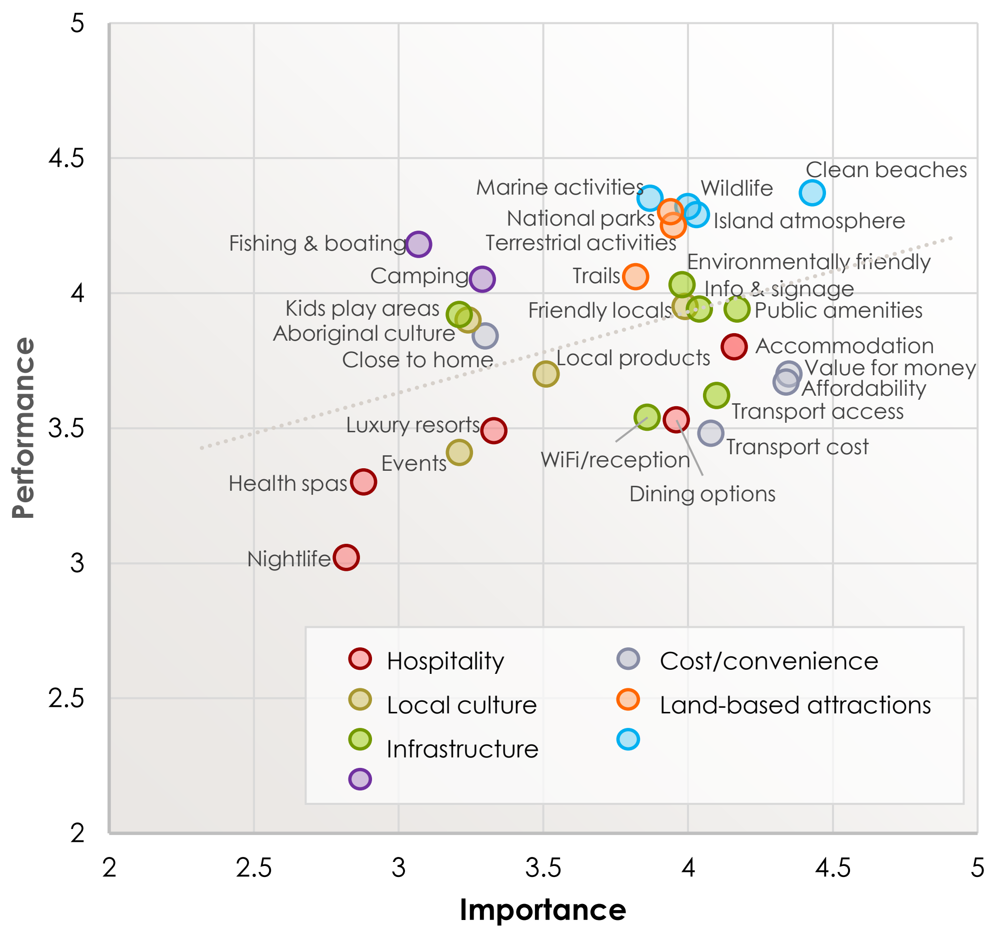


Figure 18. IPA analysis of destination attributes for online panel

3.5.4 Destination Positioning

A series of questions were included on the NSI Visitor Survey and the Online Panel Survey to better understand the positioning of Minjerribah relative to other destinations. Current visitors were asked whether they considered any other destinations when planning their trip to Minjerribah (see Table 31).

Table 31. Destinations considered when planning a Minjerribah trip

	Round 1	Round 2	Round 3
	n=649	n=891	n=609
Only Minjerribah	37.3%	46.9%	31.4%
Moreton Island	16.0%	13.6%	23.3%
Sunshine Coast/Noosa	14.3%	11.6%	19.4%
Fraser Island/Rainbow Beach	11.2%	12.3%	23.0%
Gold Coast	9.9%	8.0%	17.1%
Northern NSW/Byron Bay	9.7%	7.9%	8.5%
Brisbane	7.6%	6.2%	10.7%
Bribie Island	4.3%	4.6%	9.7%
Overseas Island destinations	4.3%	2.2%	4.3%
Other	0.9%	2.6%	4.1%

Source: NSI Visitor Survey

The results indicate that destinations which share similar features to Minjerribah (i.e. beaches, national parks, wildlife) were most likely to be considered by current visitors. However, the focus groups revealed that Minjerribah's point of difference was unclear. Moreton Island is known for sand dunes, Tangalooma Island Resort and dolphins, Fraser Island has Kingfisher Bay, perched lakes and 4WD beaches and Bribie Island was perceived to be quiet and safe. However, respondents could not identify Minjerribah's unique selling point. The results highlight the need for marketing campaigns to clearly differentiate Minjerribah from these destinations.

Visitors were also asked whether Minjerribah was the only destination they visited during the trip. Table 32 indicates that Minjerribah was the only destination of the trip for a majority of visitors (56.8%). This result is likely due to the large number of visitors originating from within 50km of the island (see Market Origin). However, in the most recent round, visitors Minjerribah were also far more likely to visit other SEQ destinations. It is not clear whether this is a COVID-19 related change in trip patterns of whether this represents a longer term trend.

Table 32. Single destination and multi-destination preferences

	Round 1	Round 2	Round 3
	n=649	n=891	n=609
Single destination trip	85.5%	70.9%	56.8%
Multi-destination trip	7.2%	23.5%	42.4%
Brisbane	5.4%	8.3%	14.3%
Gold Coast	2.5%	3.9%	11.2%
Sunshine Coast	2.2%	3.0%	10.0%
Other	0.8%	1.7%	6.9%

Source: NSI Visitor Survey

Potential visitors and non-visitors (those who indicated they did not intent to visit Minjerribah) were asked how likely they were to visit a selection of island and beach destinations (including Minjerribah) in the next five years (Figure 19). Similar to previous survey rounds, results indicate that Minjerribah is well positioned as a potential holiday destination, behind only the Gold Coast and Sunshine Coast. Overall, potential visitors indicated that a visit to North Stradbroke Island in the next five years was more likely than a visit to other nearby islands (e.g. Bribie Island, Fraser Island and Moreton Island).

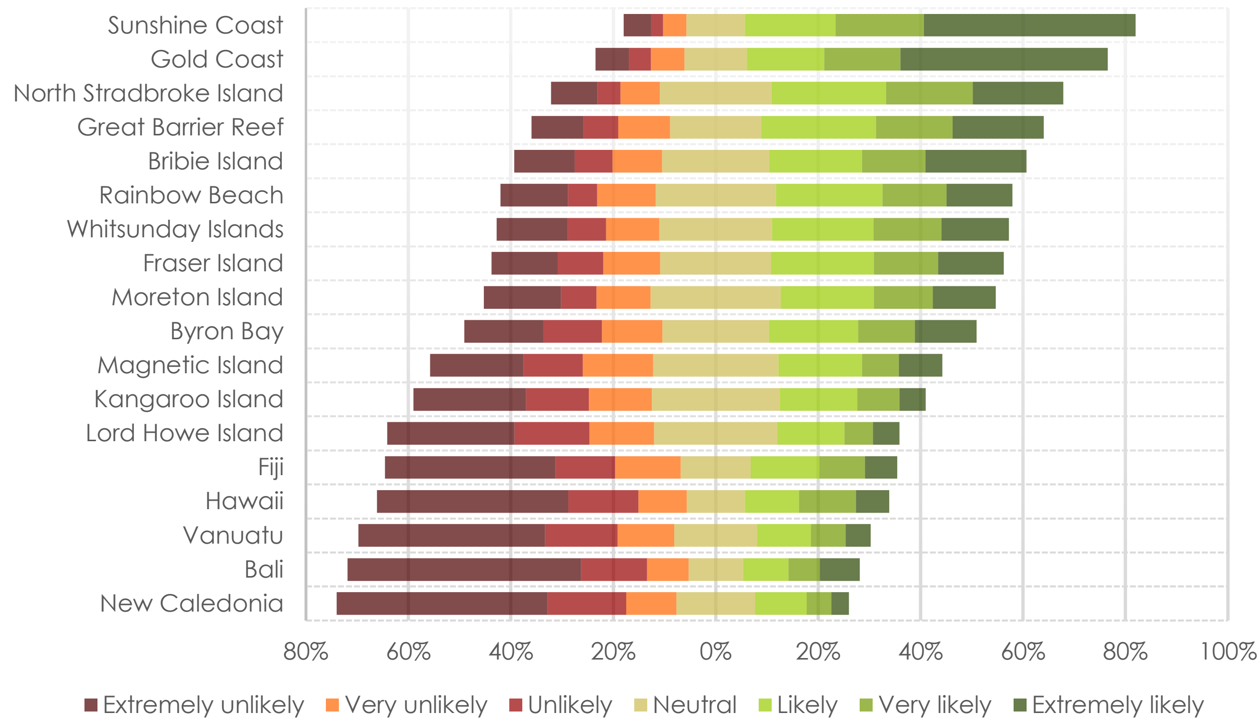


Figure 19. Likelihood of visiting in the next 5 years

The favourable positioning of Minjerribah is likely to be strongly driven by accessibility. Table 33 shows the mean visitation likelihood ratings of online panel respondents based on how far they live from Dunwich. Not surprisingly, this breakdown highlights that relative to other destinations, the likelihood of visiting Minjerribah decreases with distance.

Table 33. Visitation likelihood by distance from Minjerribah

	Less than 50km	50km to 100km	100km to 200km	More than 200km	Total
Sunshine Coast	5.66	5.41	5.39	5.28	5.51
Gold Coast	5.24	5.53	5.32	5.27	5.32
North Stradbroke Island	4.71	4.91	5.32	4.35	4.65
Great Barrier Reef	4.46	4.59	4.80	4.55	4.52
Bribie Island	4.46	4.37	4.61	4.40	4.42
Rainbow Beach	4.17	4.55	4.86	4.01	4.22
Whitsunday Islands	4.20	4.63	4.36	3.83	4.19
Fraser Island	4.12	4.37	4.80	3.92	4.16
Moreton Island	4.21	4.16	4.39	3.77	4.08
Byron Bay	3.92	4.20	4.09	3.73	3.94
Magnetic Island	3.61	3.84	4.05	3.52	3.65
Kangaroo Island	3.40	3.54	3.93	3.32	3.44
Lord Howe Island	3.18	3.32	3.86	3.09	3.24
Fiji	3.01	3.38	3.52	3.10	3.14
Hawaii	2.90	3.42	3.30	2.96	3.03
Vanuatu	2.77	3.00	3.07	2.97	2.90
Bali	2.54	2.91	3.07	2.91	2.74
New Caledonia	2.55	2.84	3.14	2.56	2.66

Means based on 1 = Extremely unlikely … 7 = Extremely likely Source: Online Survey Panel

While these results are very positive, the TripAdvisor ratings collected for this project also provides another data source for benchmarking visitor satisfaction across destinations. Rather than focussing on the entire destination, the TripAdvisor data provides an indication of visitor satisfaction for individual businesses. TripAdvisor reviewers score businesses on a five-point scale ranging from 1 = Terrible … 5 = Excellent. The ratings for individual businesses can be aggregated to produce an average satisfaction rating for restaurants, accommodation, and activities in each benchmark destination (Table 34).

Table 34. Average TripAdvisor satisfaction ratings

Destination	Accommodation			Restaurants			Activities		
	Round			Round			Round		
	1	2	3	1	2	3	1	2	3
Bribie Island	4.03	3.98	3.91	3.91	4.10	4.01	4.60	4.56	4.60
Fraser Island	3.96	4.02	4.38	3.59	4.04	3.89	4.61	4.66	4.57
Kangaroo Island	4.26	4.10	4.29	4.28	4.34	4.35	4.55	4.64	4.55
Magnetic Island	4.13	4.18	4.43	4.18	4.36	4.28	4.44	4.68	4.70
Moreton Island	4.00	4.09	3.75	3.46	3.57	3.86	4.32	4.56	4.51
North Stradbroke	3.97	3.90	3.90	3.78	3.81	4.16	4.72	4.74	4.75

Means based on 1 = Terrible … 5 = Excellent Source: TripAdvisor

The results highlight that Minjerribah continues to receive very positive ratings for activities, outperforming all of the benchmark island destinations. The island is rated less well for its restaurants and accommodation. These ratings highlight areas that could be improved, as discussed later in this report.

3.5.5 Advertising Awareness

Advertising awareness was primarily evaluated based on responses to the NSI Visitor Survey, the Online Panel and the focus groups conducted with visitors and non-visitors. The analysis revealed that 28.4% of current visitors recalled seeing advertising prior to their visit. The word cloud in Figure 20 summarises the advertising and information sources recalled by current visitors. Most unprompted recalls were for television advertisements and travel shows, magazine advertisements, social media (i.e. Facebook), ferry websites, email newsletters, brochures and billboards round the Redlands area. There was strong recall of advertising on ferries and buses while visitors were in transit to the island.

Figure 20. Unprompted advertising awareness/information sources

On the other hand, only 5% of online panellists recalled seeing any advertising in the last 12 months. This indicates a very low level of advertising awareness. Without further prompting, some respondents were able to recall hearing about Minjerribah on television and social media (similar findings are reported below for Information Sources). When respondents were prompted with specific advertisements, recall was similarly low, ranging from 3% to 12% (Figure 21). Recall was highest for the Stradbroke Island Visitor Guide produced by Sealink.

Figure 21. Prompted advertising recall (online panel)

Participants on the visitor and non-visitor focus groups both had difficulty recalling any Minjerribah advertising but online sources (i.e. social media, Google) and word-of-mouth from family and friends was mentioned several times. Past visitors discussed the fact that much of the marketing imagery emphasises natural features, possibly contributing to a lack of awareness about infrastructure and facilities. This can be addressed by including imagery of streetscapes, shops, restaurants and markets in future marketing campaigns.

Consistent with previous rounds, the non-visitor focus group attributed their lack of knowledge about Minjerribah to poor marketing and stated that basic information such as access and costs were difficult to find online. None of the non-visitors had seen any advertising about the island.

As noted in previous reports, Minjerribah is part of several larger branding portfolios, including TEQ's Southern Queensland region, Brisbane Marketing, Redland City Council and QYAC. In addition, considerable marketing collateral is produced by larger operators on the islands, including Minjerribah Camping, Stradbroke Ferries/Sealink and holiday rental agencies. Aside from the duplication of marketing effort, there is a risk that conflicting messages and branding campaigns may confuse the market. While some progress has been made to develop an integrated marketing campaign around the message of "One island, thousands of stories" as part of the broader Redlands Coast brand, this campaign has very low market awareness. Much of the awareness and momentum built up by the previous Straddie Chamber of Commerce campaign ("Where a trip becomes a tradition") appears to have been lost. Further coordination is needed between key agencies and stakeholders to ensure the destination is presented in a way that is consistent with the hopes and aspirations of the local community and the needs of future target markets.

3.5.6 Information Sources

Destination and advertising awareness are shaped by the information sources available to target markets. Current visitors were asked to indicate information sources they used **before** and **during** their visit (Table 35), while potential visitors were prompted to select sources of information about Minjerribah they recalled seeing or hearing in the last 12 months (Table 36).

Table 35. Information sources used by current visitors

	Before			During		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
	n=649	n=891	n=609	n=649	n=891	n=609
stradbrokeisland.com	33.1%	45.6%	50.9%	9.4%	17.6%	11.7%
Redlands Coast Website	-	-	15.9%	-	-	7.7%
Google or Google Maps	41.0%	44.7%	51.1%	26.5%	30.0%	36.9%
Ferry website	63.0%	62.1%	68.6%	13.1%	15.4%	17.9%
Holiday rental website	17.3%	28.3%	30.0%	2.6%	3.6%	4.4%
Private accomm. website	10.8%	17.3%	25.5%	1.8%	1.7%	4.1%
Social media	12.3%	22.2%	27.4%	7.4%	11.3%	16.6%
Blogs, forums or reviews sites	7.9%	9.3%	16.4%	2.2%	5.3%	7.7%
Online videos	3.4%	7.0%	14.0%	0.3%	2.2%	4.6%
Other websites	4.6%	7.9%	4.4%	1.5%	4.5%	2.8%
Mobile Apps	2.0%	4.4%	5.3%	2.0%	4.7%	3.1%
Email newsletters	0.5%	5.9%	6.9%	0.9%	1.9%	3.4%
Travel agent/motoring club	4.3%	4.1%	8.2%	1.8%	2.6%	3.0%
Visitor Information Centre	2.5%	5.2%	11.8%	3.4%	4.8%	15.1%
Print media	1.7%	2.8%	7.7%	1.5%	2.0%	3.8%
Television or radio	1.2%	1.7%	7.6%	1.2%	2.2%	4.6%
Brochures or visitor guides	7.4%	5.4%	12.6%	14.3%	12.6%	12.8%
Billboards or signage	4.0%	2.6%	4.8%	29.3%	10.4%	10.8%
Nat. parks brochures or signs	5.2%	7.5%	11.7%	12.8%	13.9%	18.9%
Family or friends	46.5%	40.1%	47.5%	25.3%	22.6%	26.6%
Local businesses or residents	5.4%	10.8%	7.9%	12.6%	13.9%	14.9%
Other	5.7%	5.1%	3.0%	3.4%	5.4%	3.6%

Source: NSI Visitor Survey

For current visitors, ferry websites, Google/Google Maps, stradbrokeisland.com, family and friends, and holiday rental agency websites were the most used information sources prior to visiting Minjerribah. The results highlight that stradbrokeisland.com, ferry providers and holiday rental companies continue to have a high level of online visibility when visitors search for information. Some visitors also rely on information from ferry companies during their trip – presumably to check timetables and pricing, but visitor information centres were also selected by more visitors in round 3.

Once on the island, visitors primarily relied on Google/Google Maps and advice from family and friends (usually on social media), signalling that digital information is playing an increasingly important role. The growing importance of Google/Google Maps both before and during the experience highlights that it is absolutely critical for all tourism-related businesses on the island to have a Google 'My Business' listing that includes the location, contact details and opening hours for the business. This will become even more critical as travellers move to using artificial intelligence (AI) assistants such as Google Assistant, Siri and Alexa for their information search needs.

The results in Table 36 indicate that recall of **information sources** was lower for potential visitors responding to the online panel but largely consistent with previous rounds. Family and friends continue to be an important information source.

Table 36. Information sources recalled by online panel

Online Panel	Round 1	Round 2	Round 3
	n=409	n=656	n=558
stradbrokeisland.com	7.3%	11.3%	9.5%
Internet Advertisements	6.1%	9.1%	6.6%
Ferry website	4.4%	7.2%	6.5%
Holiday rental website	3.2%	5.0%	4.8%
Private accommodation website	3.2%	3.0%	3.8%
Social media	11.2%	14.0%	12.9%
Blogs/forums/reviews	1.5%	5.3%	3.6%
Online videos	3.2%	2.9%	4.1%
Online Travel Agent	2.7%	2.4%	2.5%
Other websites	5.4%	2.0%	2.9%
Email newsletters	1.7%	4.1%	3.6%
Travel agent	6.6%	5.6%	5.0%
Visitor Information Centre	4.6%	4.6%	5.0%
Motoring club	4.4%	5.2%	4.1%
Print media	8.1%	6.3%	6.5%
TV/Radio	9.3%	11.0%	10.0%
Brochures/visitor guides	5.1%	4.6%	3.9%
Billboards or posters	3.4%	2.4%	2.3%
Family or friends	24.0%	24.8%	25.4%
Other	7.3%	11.3%	9.5%

Source: Online Survey Panel

Table 37 provides further insight into how visitors were using **mobile devices** to access digital content during their visit. The findings have two important implications. First, the relatively high proportion of visitors using mobile devices highlights the critical need for WiFi and mobile phone connectivity. Second, the heavy reliance on smartphones means that any online information needs to follow Responsive Web Design (RWD) principles to ensure that content displays well on a range of different devices and platforms.

Table 37. Current Visitors mobile device use during visit

Current Visitors	Smartphone	Tablet	Laptop
Finding information about the island	63.5%	7.6%	13.0%
Finding out about events and activities	38.1%	5.1%	7.1%
Booking accommodation or transport	39.6%	6.2%	16.1%
Reading reviews of activities or restaurants	38.8%	5.7%	6.4%
Finding my way	61.7%	3.3%	3.3%
Sharing experiences on social media	49.6%	3.6%	3.8%

Source: NSI Visitor Survey

To identify **information needs**, current visitors were asked to describe any additional information they would have liked either before or during their stay. There were a large number of responses, indicating that current information sources are falling well short of meeting visitor needs. These improvements to information services are summarised by the word cloud in Figure 22.

Figure 22. Information needs of current visitors

Improvements to meet the information needs are consistent with previous rounds and can be grouped into a number of key areas, including:

- **Maps:** tourist maps, walking tracks, bicycle tracks, 4WD access
- **Transport information:** prices, how to buy tickets, timetables, connections, parking
- **Beach, water and weather conditions:** tide times, temperature, forecasts, beach access, 4WD access
- **Facilities and services:** ATMs, water, public toilets, playgrounds, WiFi, mobile phone reception, information centres, shops
- **Restaurants:** prices, locations, menus, open hours, reservations
- **Camping:** locations, prices, facilities, maps, photos

The results from the visitor and non-visitor focus groups strongly support the survey findings. Both groups said that in comparison with other Queensland islands, there was insufficient online information about activities, facilities and transport. One participant on the visitor focus group said: “Their website is crap! I got the feeling that because it is really popular in high season, they’re making enough money to not have to sell the place during low season. The pictures on the website are crap and their booking system is really bad too.”

Additional signage and promotion of key events, attractions and distinctive features would also be beneficial. One participant on the visitor focus group summarised the sentiment well: “The signage on the island is just dismal. There's so much opportunity there to really tell great stories and get people there. We nearly got lost because there was just no signage.”

3.6 The Visitor Experience

3.6.1 Transport

The NSI Visitor Survey was mainly collected on the two water taxi services and the vehicle barge to the island. This sampling strategy directly influences the water transport modes selected by visitors on the survey (Table 38). The results indicate a heavy reliance on private vehicles to access ferry terminals, imposing a strain on parking facilities during peak periods. Despite good public transport connectivity to Cleveland, few visitors used public transport. In some instances, this may be because visitors were travelling in family or friendship groups. However, focus group interviews revealed a perception among both visitors and non-visitors that the island was "hard to get to by public transport." Results presented earlier in this report are also consistent with this interpretation (Figure 18).

Table 38. Transport modes used by current visitors

Current Visitors	Round 1		Round 2		Round 3	
	N	Percent	N	Percent	N	Percent
Getting to the Island						
Car ferry	415	63.9%	573	64.3%	356	58.5%
Water taxi	241	37.1%	288	32.3%	217	35.6%
Own vehicle	239	36.8%	297	33.3%	159	26.1%
Bus	60	9.2%	67	7.5%	49	8.0%
Train	20	3.1%	25	2.8%	11	1.8%
Private vessel	9	1.4%	9	1.0%	25	4.1%
Rental vehicle	6	0.9%	6	0.7%	8	1.3%
Other	9	1.4%	39	4.4%	6	1.0%
Getting around the island						
Own vehicle	430	66.3%	599	67.2%	354	58.1%
Bus	167	25.7%	161	18.1%	139	22.8%
Walking	141	21.7%	251	28.2%	157	25.8%
Local's vehicle	30	4.6%	46	5.2%	50	8.2%
Rental vehicle	17	2.6%	14	1.6%	24	3.9%
Bicycle	12	1.8%	26	2.9%	35	5.7%
Taxi	6	0.9%	13	1.5%	16	2.6%
Other	12	1.8%	8	0.9%	17	2.8%

Source: NSI Visitor Survey

Once on the island, the strong reliance on private vehicles continued, although a quarter of visitors reported that they used the bus or walked. The use of bicycles was much lower than expected, given the distances between key locations on the island. Transport to and around the island is frequently identified as an area for improvement by visitors.

Many comments were received on both surveys as well as the focus groups when participants were asked to provide suggestions for improving transport (Figure 23). These suggestions for improvement echo the findings from previous rounds.

Figure 23. Transport improvements

The transport improvements suggested by current visitors include:

- **Ferries:** (a) more frequent/regular ferry services or staggering departure times between two water taxi companies; (b) reduce confusion about different departure points for ferries at Dunwich; (c) improve ferry terminals; (d) subsidise vehicle ferry prices to make them more affordable; and (e) include ferry services in the TransLink/Go Card network.
- **Buses:** (a) more frequent bus services, a hop-on/hop-off shuttle, better interchange between buses and ferries; (b) include the cost of the island bus in the ferry ticket; (c) include the island bus in the TransLink/Go Card network; and (d) improve access and frequency to key sites Amity Pt, Brown Lake, Blue Lake and the Keyholes.
- **Island connectivity:** (a) improve pedestrian access to key sites; (b) ability to hire cars, 4WDs, mopeds, electric scooters, e-bikes and/or bicycles in Dunwich.
- **Taxis/rideshare:** more taxis and ride sharing services (e.g. Uber).
- **Bicycle trails:** access to key tourist sites, with good connectivity to other public transport modes.
- **Mainland travel time**: (a) reduce the travel time between the city and ferries at Toondah Harbour; (b) offer morning and afternoon express train services on the weekends for day trippers.
- **Navigation**: improve signage and wayfinding at key visitor sites.

As noted in reports for previous rounds, the island lacks a distinctive and sustainable form of transport. Hamilton Island is known for its golf buggies and Magnetic Island has become well known for its Mini Mokes. The recent introduction of electric scooters in Brisbane has sparked public interest in similar services. Although four wheel-driving is popular on the island, other Queensland destinations also offer these opportunities. There is substantial scope to adopt a novel form of transport that can be readily identified with the island.

The affordability of transport to the island was a frequently recurring theme across much of the data collected for this report. Table 39 provides a summary of off-peak return ferry prices presented in previous reports for several Australian offshore island destinations.

Table 39. 2018 Off-peak return ferry prices for Australian off-shore islands

Destination	Duration	Vehicle Return	Adult Return
Straddie Flyer (Gold Cats)	25 min	-	$20
Stradbroke Ferries (Sealink)	25 min	$130	$14
Moreton Island MICAT	75 min	-	$56
Tangalooma Island Resort	75 min	-	$80
Moreton Island Amity Trader	120 min	$270	$40
Redcliffe2Moreton Express	40 min	-	$90
Fraser Island Barges	50 min	$175	$60
Manta Ray Fraser Island	10 min	$120	-
Palm Island (Sealink)	90 min	-	$70
Magnetic Island (Sealink)	20 min	-	$33
Magnetic Island (Fantasea)	40 min	$193	$26
Kangaroo Island (Sealink)	45 min	$196	$98
Rottnest Island (Sealink)	25 min	-	$49
Rottnest Express	25 min	-	$42
Rottnest Fast Ferries	45 min	-	$68

The results suggest that the current water taxi fares for Minjerribah are low, even when compared against other journeys of a similar duration. Vehicle ferry prices are also at the lower end of the spectrum. Perhaps, as has been noted in other parts of this report, the issue is less about cost and more about perceptions of value for money.

3.6.2 Accommodation

Table 40 provides a breakdown of accommodation preferences for current and potential visitors. Camping or glamping (28.0%) and holiday rentals (26.2%) were the most common styles of accommodation used by current visitors.

Table 40. Accommodation preferences

Current Visitors	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Tent, camping or glamping	27.5%	32.9%	28.0%	25.2%	38.1%	36.1%
Caravan park	7.1%	4.6%	6.6%	20.5%	19.4%	19.1%
Cabin	4.2%	4.1%	6.9%	46.9%	45.9%	46.7%
Own property	12.5%	8.3%	10.1%	1.7%	1.7%	1.9%
Backpackers	2.9%	2.5%	1.1%	4.2%	3.0%	2.9%
Hotel or resort	6.6%	13.2%	7.1%	46.2%	46.0%	50.9%
Holiday rental	28.7%	25.4%	26.2%	42.3%	44.7%	49.7%
Apartment	4.2%	7.8%	7.9%	45.5%	47.0%	48.2%
Visiting friends or relatives (VFR)	13.0%	6.3%	13.0%	3.4%	3.4%	4.2%
B&B or guest house	1.2%	1.5%	2.4%	30.6%	22.9%	25.4%
Boat or yacht	0.0%	0.2%	1.9%	5.4%	6.1%	6.7%
Other	2.5%	2.2%	1.3%	0.7%	1.1%	0.2%

Source: NSI Visitor Survey, Online Survey Panel

Potential visitors were asked to indicate the styles of accommodation they would be most likely to choose. The results for all three survey rounds indicate strong unmet demand for hotel or resort style accommodation, cabins, apartments and B&B style accommodation. While the island has a good supply of holiday rentals, the development of a more diverse mix of accommodation options, including cabins and commercial accommodation such as hotels, resorts and self-catering apartments is likely to draw more visitors to the island. Further insights can be gained into the accommodation preferences of potential visitors by examining family lifecycle stage (Table 41).

Table 41. Online panel accommodation preferences by family lifecycle

Online Panel	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nesters	Older Singles
Tent, camping …	35.2%	43.1%	50.0%	41.1%	32.7%	31.5%	20.8%
Caravan park	7.0%	18.1%	25.0%	29.5%	22.4%	16.4%	10.4%
Cabin	52.1%	43.1%	43.2%	51.6%	49.0%	42.5%	41.7%
Own property	1.4%	5.6%	4.5%	0.0%	1.0%	1.4%	2.1%
Backpackers	4.2%	5.6%	0.0%	1.1%	1.0%	2.7%	6.3%
Hotel or resort	52.1%	50.0%	54.5%	55.8%	53.1%	43.8%	43.8%
Holiday rental	54.9%	58.3%	59.1%	57.9%	53.1%	32.9%	25.0%
Apartment	47.9%	48.6%	50.0%	48.4%	52.0%	39.7%	41.7%
VFR	4.2%	11.1%	4.5%	3.2%	2.0%	2.7%	2.1%
B&B/guest house	29.6%	30.6%	22.7%	23.2%	26.5%	20.5%	25.0%
Boat or yacht	8.5%	8.3%	4.5%	3.2%	8.2%	8.2%	8.3%

Source: Online Survey Panel

Demand for hotel/resort accommodation was highest for young singles (52.1%) and younger couples (50.0%) but was high across all lifecycle stages. Holiday rentals, apartments and cabins were more appealing to couples and younger families. The interest in cabins aligns with current plans to develop 'glamping' style accommodation on the island. B&Bs were more attractive to young singles (29.6%), couples (30.6%) and older singles (25.0%). In contrast with destinations such as Magnetic Island, support for backpacker-style accommodation was weak across all family lifecycle stages except young singles.

A comparison of the accommodation preferences of potential visitors by total daily spend shows that cabins are likely to attract higher yield markets than camping (Table 42). Higher yield markets were also interested in hotels, resorts, holiday rentals and apartments.

Table 42. Online Panel accommodation preferences by total daily spend

Online Panel	Up to $135	$136-$235	Over $235	Median
Tent, camping or glamping	48.0%	53.7%	29.7%	$275
Caravan park	20.0%	23.2%	16.6%	$300
Cabin	30.0%	46.3%	47.8%	$340
Own property	-	2.4%	1.6%	$350
Backpackers	4.0%	6.1%	2.2%	$225
Hotel or resort	28.0%	48.8%	55.9%	$370
Holiday rental	30.0%	53.7%	51.2%	$353
Apartment	44.0%	46.3%	50.6%	$367
Boat or yacht	10.0%	7.3%	5.9%	$292
B&B/guest house	22.0%	18.3%	26.9%	$370
VFR	2.0%	8.5%	3.4%	$278

Source: Online Survey Panel

The location of any new accommodation requires careful planning and consideration to ensure that new developments do not threaten the cultural, environmental and aesthetic amenity of the island. However, Magnetic Island offers an interesting example of what might be possible. Like Minjerribah, Magnetic Island is only 20-25 minutes from a major mainland city and a majority of the island is National Park. Magnetic Island has a rich indigenous heritage and offers a numerous beaches and bays, only some of which are easily accessible by road. There are a number of townships on both the mainland and ocean-side of the island. A marina and ferry terminal were opened at Nelly Bay on the mainland side of the island in 2003. The marina includes a number of two and three-storey low rise apartments and a resort operated by Peppers Resorts. These developments have brought economic benefits to Nelly Bay, without compromising the aesthetic value and island charm of other parts of the island, most notably seaside bays such as Alma Bay and Horseshoe Bay. The question of whether Dunwich could serve a similar gateway role with the addition of more locally owned commercial accommodation should be explored with the local community. Due consideration must also be given to any inflationary impact such development might have on property values and housing costs for local residents.

TripAdvisor reviews for accommodation on the island identified a number of issues. The average rating of 3.90/5.00 reported earlier in this report was lower than most of the benchmark island destinations. An analysis of negative reviews (ratings of 1-3) revealed several themes that require further attention (Figure 29).

Figure 24. Negative TripAdvisor reviews for accommodation

The results have not changed from those presented in previous rounds. The three major areas of disappointment were staff, rooms and food. Many of the reviewers expressed disappointment with the level of service received from staff, particularly at check in and check out. Negative comments about rooms were primarily related to cleanliness or maintenance issues with lighting, air-conditioning, showers and toilets. The comments about food related to properties that also offered onsite dining and these issues are discussed further below (see 'Food and Dining').

Figure 25. Accommodation improvements

Current visitors provided several suggestions for improving accommodation on the island (Figure 25). These suggestions can be grouped under the following key themes:

- **Quality:** (a) upgrade camping facilities (e.g. toilets, showers, camp kitchens, water fountains, electricity, charging stations, WiFi, cleanliness, waste management, dumping points for portaloos, BBQs); (b) improve quality of hotel and resort style accommodation.
- **Availability:** (a) ability to book a range of accommodation online; (b) package accommodation with other travel components such as buses and ferries; (c) improve availability and affordability of accommodation, particularly during peak times.
- **Choice:** (a) offer a greater variety of accommodation styles (e.g. ensuite cabins, caravan parks, houseboats, ecolodges and environmentally friendly accommodation, more family accommodation, pet-friendly options); (b) provide more accommodation at Dunwich and Amity Point.
- **Access:** improve access to accommodation for visitors who do not have their own vehicles.

The focus groups revealed that the island was strongly associated with camping and holiday houses. Self-catering options and good facilities at campsites (e.g. BBQs, showers and toilets) were seen as essential for attracting more visitors. While some were happy to camp, others wanted more comfortable accommodation options.

3.6.3 Activities and Experiences

Current visitors were asked to indicate the settings and attractions they visited during their trip (Table 43). The results indicate that all three townships received heavy visitation, although the results do not reveal how much time or money visitors spent at each location. Dunwich was most likely selected because it is the gateway to the island. A number of additional beaches were added to the survey in rounds 2 and 3 and high visitation to these reinforces the island's reputation as a beach destination.

Table 43. Visitor settings and attractions

Current Visitors	Round 1		Round 2		Round 3	
	N	Percent	N	Percent	N	Percent
Point Lookout	557	85.8%	770	86.4%	509	83.6%
Dunwich	439	67.6%	547	61.4%	312	51.2%
Amity Point	333	51.3%	468	52.5%	311	51.1%
Main Beach			407	45.7%	306	50.2%
Cylinder Beach	402	61.9%	494	55.4%	278	45.6%
North Gorge Walk	354	54.5%	434	48.7%	249	40.9%
Brown Lake	221	34.1%	251	28.2%	153	25.1%
Deadman's Beach			177	19.9%	139	22.8%
Home Beach			280	31.4%	115	18.9%
Blue Lake	42	6.5%	59	6.6%	112	18.4%
Frenchman's Beach	180	27.7%	170	19.1%	96	15.8%
Adder Rock			231	25.9%	95	15.6%
Myora Springs CA	96	14.8%	92	10.3%	54	8.9%
Naree Budjong Djara NP	26	4.0%	31	3.5%	53	8.7%
NSI Historical Museum	27	4.2%	38	4.3%	36	5.9%
Other	107	16.5%	39	4.4%	20	3.3%

Source: NSI Visitor Survey

The NSI Historical Museum, Myora Springs Conservation Area and Naree Budjong Djara National Park received low visitation. It is likely many visitors entered the National Park but were not aware that they had entered the park. New National Parks signage has created a 'sense of place' and may account for an increase in the number of visitors indicating that they had visited this site.

Current visitors were asked about the activities they participated in during their stay, while potential visitors were asked about activities that would attract them to Minjerribah (Table 44). The results are very similar to those reported in round 1, but several new activities were added to the survey after they were mentioned by respondents. Not surprisingly, the results indicate that wildlife spotting (58.1%) and relaxing or walking on the beach (57.5%) were major visitor activities. Water sports such as swimming, kayaking and surfing (53.7%); watching whales, dolphins and turtles (41.4%); bush walking (40.9%); and dining (45.8%) were major activities for current visitors. Not surprisingly, there was a significant decrease in the number of visitors who participated in a festival or event during their stay.

Potential visitors indicated that seeing whales, dolphins and turtles (66.0%); relaxing or walking on the beach (61.3%); bush walking (49.7%); seeing island wildlife (49.1%); and water sports (42.3%) would attract them to the island. Potential visitors also showed a stronger interest in markets (46.0%) and snorkelling or diving (38.0%). Marketing campaigns that feature these opportunities will attract more potential visitors, provided the island can deliver these experiences at a high standard.

Table 44. Activity and experience preferences

Current Visitors	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Wildlife spotting	56.4%	59.9%	58.1%	56.0%	53.4%	49.1%
Relaxing or walking on a beach		63.5%	57.5%		66.5%	61.3%
Water sports	65.8%	52.6%	53.7%	53.5%	52.6%	42.3%
Whales, dolphins & turtles	51.8%	51.3%	41.4%	77.5%	72.9%	66.0%
Bush walking	30.5%	31.9%	40.9%	56.2%	51.5%	49.7%
Dining		45.8%	39.4%		36.6%	37.1%
Four-wheel driving	21.1%	23.8%	23.8%	26.2%	30.6%	24.1%
Bird watching	25.6%	30.1%	23.5%	29.1%	26.7%	21.6%
Visiting friends or relatives		20.3%	19.2%		12.8%	10.7%
Fishing & boating	16.8%	19.9%	19.2%	29.3%	27.1%	22.1%
Camping	21.3%	25.7%	18.6%	29.1%	37.8%	28.2%
Shopping	22.3%	18.7%	16.3%	31.5%	29.3%	22.7%
Markets	11.1%	8.9%	14.8%	60.1%	53.0%	46.0%
Snorkelling/diving	14.2%	10.2%	11.0%	37.9%	43.9%	38.0%
Aboriginal culture	9.4%	10.9%	8.7%	27.4%	20.3%	21.9%
Land-based sports	10.0%	8.3%	7.9%	19.8%	21.8%	14.9%
Museums/art galleries	6.3%	5.9%	6.6%	31.8%	26.2%	25.6%
Organised tour	0.8%	1.2%	3.9%	24.9%	16.9%	15.2%
Events or festivals	8.8%	20.3%	3.8%	30.8%	29.7%	24.8%
Work, study or research		4.7%	3.6%		5.3%	2.6%
Other	1.2%	2.6%	2.3%	1.0%	0.8%	0.6%
Massage & spa treatments	1.2%	1.1%	1.8%	23.5%	20.9%	19.9%

Source: NSI Visitor Survey, Online Panel

The results indicate that whale watching, wildlife spotting, bush walking, water-based activities and beaches are strong attractors for current visitors as well as potential visitors. Cultural experiences such as learning about aboriginal culture, events and festivals, markets, museums and art galleries are not currently strong attractors, but offer something to do once visitors are on the island.

The activity preferences of potential visitors can be further explored by examining these preferences by family lifecycle (Table 45). The results indicate that interest in activities such as visiting museums and galleries, organised tours, and learning about Aboriginal culture generally increases with family lifecycle. Interest in water sports declines for older family lifecycle groups. The results also indicate that younger couples and older families (Full Nest III) are interested in the widest range of activities.

Table 45. Online Panel activity and experience preferences by family lifecycle

Online Panel	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Beaches	57.3%	56.0%	73.5%	63.4%	63.9%	61.2%	60.0%
Wildlife spotting	49.0%	51.2%	61.2%	47.3%	45.9%	49.0%	45.0%
Water sports	39.6%	56.0%	46.9%	50.0%	44.3%	30.6%	31.7%
Whales, dolphins…	59.4%	69.0%	75.5%	70.5%	63.1%	62.2%	71.7%
Dining	22.9%	36.9%	38.8%	38.4%	43.4%	37.8%	38.3%
Bush walking	41.7%	59.5%	55.1%	50.9%	50.0%	48.0%	45.0%
Bird watching	16.7%	21.4%	26.5%	19.6%	22.1%	19.4%	28.3%
Camping	25.0%	31.0%	46.9%	36.6%	26.2%	19.4%	18.3%
Four-wheel driving	15.6%	31.0%	24.5%	28.6%	27.9%	19.4%	23.3%
Events or festivals	25.0%	27.4%	26.5%	21.4%	26.2%	20.4%	30.0%
VFR	15.6%	15.5%	14.3%	6.3%	13.1%	4.1%	5.0%
Fishing & boating	18.8%	14.3%	38.8%	21.4%	23.0%	22.4%	21.7%
Shopping	11.5%	19.0%	26.5%	25.0%	26.2%	25.5%	21.7%
Aboriginal culture	19.8%	15.5%	24.5%	24.1%	20.5%	26.5%	23.3%
Snorkelling/diving	35.4%	51.2%	36.7%	48.2%	41.0%	23.5%	25.0%
Markets	38.5%	44.0%	55.1%	44.6%	52.5%	48.0%	41.7%
Land-based sports	17.7%	19.0%	14.3%	15.2%	14.8%	9.2%	6.7%
Museums/galleries	17.7%	20.2%	24.5%	27.7%	27.0%	24.5%	40.0%
Work, study…	4.2%	3.6%	4.1%	0.9%	1.6%	1.0%	1.7%
Organised tour	10.4%	15.5%	10.2%	9.8%	15.6%	15.3%	33.3%
Massage & spa	18.8%	22.6%	22.4%	17.9%	23.0%	16.3%	15.0%

Source: Online Survey Panel

It can be useful to look at activity preferences by daily spend when considering which activities to develop on the island. The analysis in Table 46 indicates that lower yield visitors are more interested in camping, four-wheel driving, fishing, and boating, while higher yield visitors are more interested in museums and galleries, dining, events and festivals, markets, and learning about Aboriginal culture.

Table 46. Online Panel activity and experience preferences by daily spend

Online Panel	Up to $135	$136-$235	Over $235	Median
Relaxing or walking on a beach	66.7%	78.2%	71.9%	$330
Wildlife spotting	52.6%	63.2%	57.2%	$329
Water sports	47.4%	58.6%	47.3%	$320
Whales, dolphins & turtles	71.9%	73.6%	79.0%	$340
Dining	26.3%	42.5%	49.4%	$379
Bird watching	26.3%	27.6%	24.6%	$325
Bush walking	54.4%	60.9%	60.8%	$333
Camping	38.6%	42.5%	28.4%	$292
Four-wheel driving	33.3%	28.7%	27.5%	$337
Events or festivals	15.8%	25.3%	31.7%	$340
Visiting friends or relatives	3.5%	19.5%	11.4%	$317
Fishing & boating	22.8%	33.3%	26.6%	$317
Shopping	17.5%	18.4%	31.4%	$400
Aboriginal culture	19.3%	20.7%	29.0%	$370
Snorkelling/diving	36.8%	51.7%	45.8%	$329
Markets	31.6%	51.7%	56.9%	$360
Land-based sports	7.0%	23.0%	20.1%	$337
Museums/art galleries	21.1%	26.4%	31.4%	$360
Work, study or research	3.5%	2.3%	3.0%	$320
Organised tour	12.3%	12.6%	21.9%	$375
Massage & spa treatments	10.5%	23.0%	25.1%	$375

Source: Online Survey Panel

TripAdvisor reviews for activities on the island were largely positive. The average rating of 4.75/5.00 reported earlier in this report was higher than for other benchmark island destinations. Analysis of negative reviews did not reveal any clear or consistent themes for improvement.

Current visitors provided several suggestions for improving activities and experiences on the island (Figure 26).

Figure 26. Suggestions for new activities and experiences

Suggestions from all three rounds of data collection can be grouped under the following key themes:

- **Land-based activities:** horse riding, camel riding, 4WD tours, zip lines, bicycle tours, tree-climbing, eco and wildlife tours, nocturnal wildlife tours (spotlighting), stargazing, dolphin and manta ray feeding, yoga, and massage.
- **Sea-based activities:** boat tours, fishing charters, jet ski tours, jet boats, diving and snorkelling tours, and whale watching.
- **Indigenous experiences:** cultural experiences, arts, crafts, dance, tours, self-guided walks and bush tucker/survival tours.
- **Trails:** walking and cycling trails with easy access to public transport catering for self-guided tours, guided tours, orienteering, mountain biking and electric bicycles/scooters.
- **Special needs:** facilities and amenities that cater for special needs, including older travellers, families with children and visitors with pets.
- **Equipment hire:** bicycles, electric bicycles, motorised skateboards, golf buggies, boats, and water sports

3.6.4 Indigenous Tourism Experiences

The NSI visitor survey and online panel survey included two questions designed to gauge the level of awareness about the indigenous culture of the island (Table 47). While a majority of current visitors had some awareness of the local Aboriginal community and acknowledged that they had heard the term 'Quandamooka', the level of awareness amongst potential visitors on the online panel was lower.

Table 47. Indigenous awareness

	Current Visitors		Online Panel	
Strong knowledge of local Aboriginal community & traditions	63	10.4%	21	3.5%
Aware that there is a local Aboriginal community	397	65.6%	256	42.5%
Unaware of any local Aboriginal community or tradition	78	12.9%	191	31.7%
Could not say	67	11.1%	135	22.4%
Have heard the term 'Quandamooka'	290	47.6%	125	20.8%

Source: NSI Visitor Survey, Online Panel

The earlier analysis of 'Activities and Experiences' indicated only moderate support activities that involved learning about Aboriginal culture. Likewise, the earlier section on 'Reasons for Visiting' and 'Destination Attributes' indicated that Aboriginal culture was a less important motivator than other destination attributes. These perceptions are likely based on what the island currently offers and a general lack of awareness of the Indigenous heritage of NSI. To further test whether there would an interest in new Indigenous experiences, both current and potential visitors were asked to rate how likely they would be to participate in a range of Indigenous experiences if they were available (Table 48).

Table 48. Likelihood of participating in Indigenous experiences

	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Visit an Aboriginal cultural site	3.54	3.58	3.64	3.74	3.51	3.82
Learn about Aboriginal bush tucker	3.52	3.57	3.56	3.59	3.41	3.69
Aboriginal cultural centre or gallery	3.44	3.50	3.54	3.66	3.44	3.78
Aboriginal dance, music or cultural performance	3.52	3.51	3.52	3.66	3.51	3.73
Aboriginal operated whale watching tour	3.53	3.51	3.50	3.78	3.66	3.98
Purchase Aboriginal art/craft or souvenirs	3.32	3.30	3.45	3.42	3.28	3.63
Island tour with an Aboriginal guide	3.33	3.40	3.44	3.58	3.31	3.64
Learn about boomerangs, spears or other weapons	3.29	3.31	3.39	3.43	3.31	3.53
Aboriginal operated accommodation	3.12	3.20	3.25	3.38	3.23	3.53

Mean based on 1=Not at all likely … 5=Very likely

Source: NSI Visitor Survey, Online Panel

The results reveal reasonably strong support for some types of Indigenous tourism experiences, particularly from potential visitors. The opportunity to participate in an Aboriginal whale watching tour was rated most highly by both current and potential visitors. There was also some support visiting an Aboriginal cultural site and for an Aboriginal Cultural Centre, which could be used as a focal point for Aboriginal dance, music, performance and art. Figure 27 and Figure 28 provide a more detailed analysis of the distribution of responses for current and potential visitors.

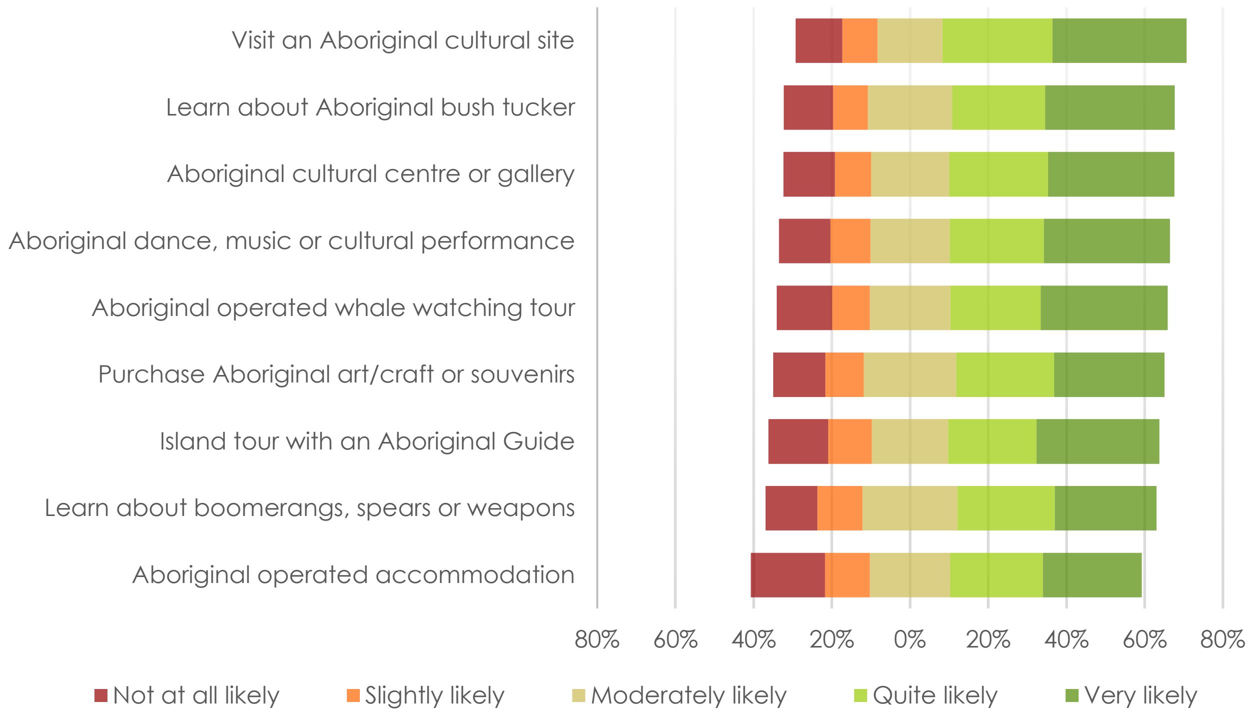


Figure 27. Current Visitors likelihood of participating in Indigenous experiences

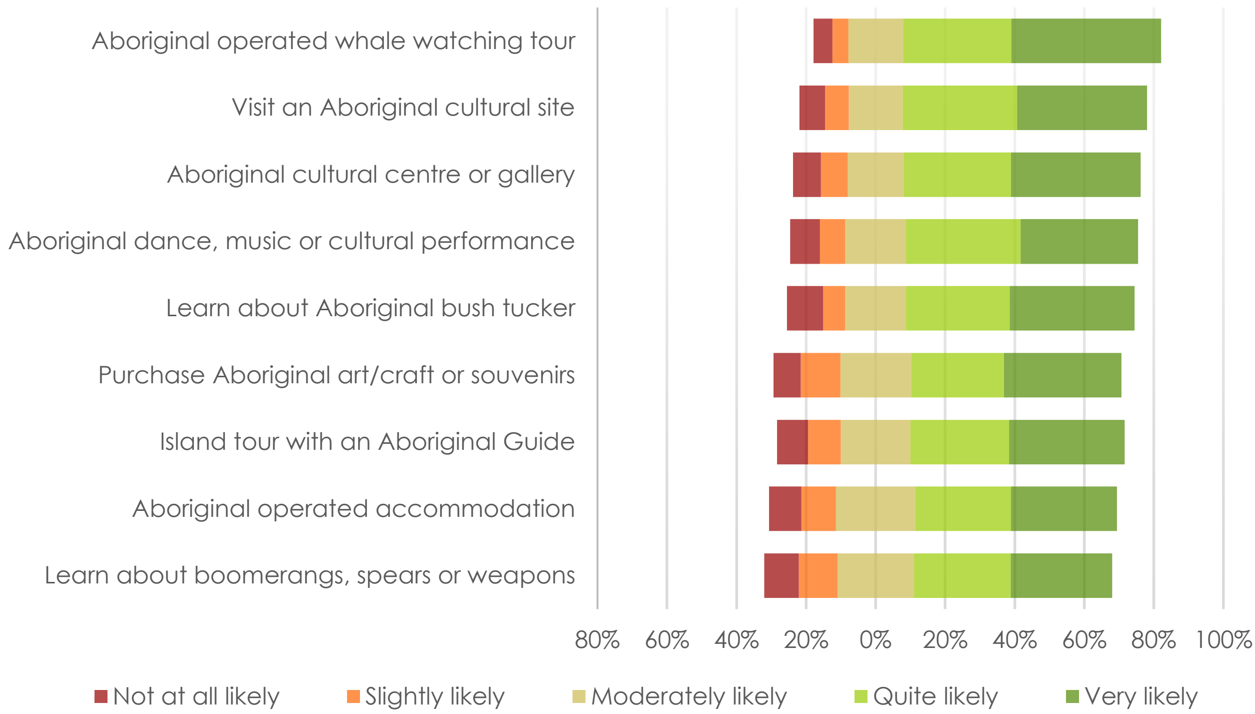


Figure 28. Potential Visitors likelihood of participating in Indigenous experiences

Further insights emerge when comparing the likelihood of potential visitors at different stages of the family lifecycle participating in Indigenous tourism experiences. Table 49 indicates that younger couples, older families (Full Nest III) and older singles are more likely to participate in Indigenous tourism experiences.

Table 49. Likelihood of participating in Indigenous experiences by family lifecycle

Online Panel	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Aboriginal whale watching tour	4.01	3.88	3.84	3.98	4.11	3.81	4.21
Aboriginal performance	3.65	3.63	3.42	3.82	3.79	3.71	3.91
Aboriginal cultural centre or gallery	3.67	3.74	3.57	3.75	3.85	3.75	4.00
Visit an Aboriginal cultural site	3.65	3.72	3.61	3.89	3.90	3.79	4.02
Learn about Aboriginal bush tucker	3.52	3.54	3.46	3.74	3.81	3.67	3.85
Learn about boomerangs, spears…	3.36	3.43	3.46	3.61	3.57	3.47	3.58
Island tour with an Aboriginal guide	3.59	3.29	3.40	3.62	3.75	3.65	3.91
Purchase Aboriginal art/craft…	3.59	3.79	3.41	3.51	3.83	3.43	3.69
Aboriginal accommodation	3.65	3.51	3,41	3.58	3.57	3.33	3.52

Mean based on 1=Not at all likely … 5=Very likely   Source: Online Survey Panel

Table 50 shows that high-yield potential visitors are most likely to participate in Indigenous experiences. Together, the results in Table 49 and Table 50 suggest that the key markets are high-yield younger singles, couples, empty nesters and older singles rather than families.

Table 50. Likelihood of participating in Indigenous experiences by daily spend

Online Panel	Up to $135	$136-$235	Over $235
Aboriginal operated whale watching tour	3.55	4.00	4.04
Aboriginal dance, music or cultural performance	3.47	3.70	3.78
Aboriginal cultural centre or gallery	3.41	3.70	3.85
Visit an Aboriginal cultural site	3.36	3.76	3.92
Learn about Aboriginal bush tucker	3.25	3.75	3.77
Learn about boomerangs, spears or other weapons	3.27	3.51	3.58
Island tour with an Aboriginal guide	3.53	3.55	3.70
Purchase Aboriginal art/craft or souvenirs	3.19	3.58	3.72
Aboriginal operated accommodation	3.06	3.42	3.61

Mean based on 1=Not at all likely … 5=Very likely   Source: Online Survey Panel

To better understand the time and money potential visitors were willing to commit to these experiences additional questions were added to the online panel surveys in round 2 and 3. These questions and individual items were only shown to respondents who indicated that they were '*Very Likely*' to participate in each type of indigenous experience. Potential visitors were first asked to indicate how much time they would ideally be prepared to each activity (see Table 51).

Table 51. Ideal duration of Indigenous experiences

Online Panel	1 hour	2 hours	3 hours	Half-day	Full-day
Island tour with an Aboriginal guide	13.8%	25.7%	13.8%	30.3%	16.5%
Aboriginal cultural centre or gallery	32.7%	33.7%	23.8%	5.9%	4.0%
Aboriginal performance	26.9%	44.2%	14.4%	10.6%	3.8%
Visit an Aboriginal cultural site	22.0%	33.0%	20.2%	21.1%	3.7%
Purchase Aboriginal art/craft…	44.8%	25.3%	12.6%	12.6%	4.6%
Learn about Aboriginal bush tucker	24.8%	28.7%	20.8%	17.8%	7.9%
Learn about boomerangs, spears …	31.2%	39.0%	19.5%	6.5%	3.9%
Aboriginal whale watching tour	4.1%	14.4%	24.7%	38.1%	18.6%

Source: NSI Visitor Survey

The results indicate that most visitors are looking for experiences that are less than two hours in duration. Exceptions include island and whale watching tours, which are more likely to be viewed as half-day or full-day activities. Following this question, potential visitors were asked how much they would be prepared to pay (per person) for each activity (see Table 52).

Table 52. Willingness to pay for Indigenous experiences

Online Panel	< $20	$21-$40	$41-$60	$61-$80	$81-$100	$100 +
Island tour with an Aboriginal guide	5.5%	30.9%	24.5%	14.5%	15.5%	9.1%
Aboriginal accommodation	2.4%	7.3%	8.5%	17.1%	17.1%	47.6%
Aboriginal cultural centre or gallery	44.1%	30.4%	15.7%	2.0%	4.9%	2.9%
Aboriginal performance	15.4%	41.3%	15.4%	14.4%	8.7%	4.8%
Visit an Aboriginal cultural site	31.8%	29.9%	21.5%	5.6%	6.5%	4.7%
Purchase Aboriginal art/craft…	2.3%	30.7%	19.3%	12.5%	19.3%	15.9%
Learn about Aboriginal bush tucker	14.0%	33.0%	27.0%	15.0%	6.0%	5.0%
Learn about boomerangs, spears …	25.6%	41.0%	20.5%	7.7%	2.6%	2.6%
Aboriginal whale watching tour	3.1%	13.4%	15.5%	19.6%	27.8%	20.6%

Source: NSI Visitor Survey

The results indicate that potential visitors are willing to pay more for whale watching tours and accommodation. Island tours were in the middle tier, while visitors are generally prepared to pay less than $40 per person for other activities. Cultural centres, cultural sites and learning about aboriginal weapons and artefacts are seen as low-cost options by most visitors.

Interest in Indigenous experiences was also discussed with focus group participants. Focus group participants expressed strong enthusiasm for experiences such as bushwalks with stories told by local Quandamooka people; learning about, seeing and buying arts and crafts; opportunities to visit cultural sites; and guided tours focussing on flora and fauna and the Quandamooka people's connection with the land. One participant from the visitor focus group relayed the following experience: "One thing I really enjoyed there with the Indigenous culture is Indigenous astronomy… I was able to sit with one of the leaders and he told me all the stories of the stars and what the Quandamooka people believe… and that took it to another level, like oh my!!"

Overall, the results suggest that there is limited recognition or understanding of Aboriginal Culture or Indigenous activities currently available on Minjerribah. However, there is an appetite for certain types of Indigenous experiences if they are developed in the future. Stakeholders should consider marketing strategies to change perceptions and awareness about the unique Aboriginal heritage of the island.

3.6.5 Festivals and Events

Festivals and events are an important component of any successful destination. They can attract new visitors to a destination and encourage visitation outside peak periods. The data from previous survey rounds indicated relatively low participation in major events (Table 53). In round 3, most major events were postponed or cancelled due to COVID-19 restrictions. However, the markets held regularly at Point Lookout were once again the most well attended event on the island.

Table 53. Current visitors festival and events attendance

Current Visitors	Round 1		Round 2		Round 3	
	N	Percent	N	Percent	N	Percent
Point Lookout Markets	103	15.9%	157	17.6%	140	23.0%
Island Vibe Festival	27	4.2%	148	16.6%	-	-
Quandamooka Festival	24	3.7%	30	3.4%	-	-
Straddie Assault	12	1.8%	11	1.2%	18	3.0%
Stradbroke Chamber Music Festival	6	0.9%	8	0.9%	7	1.1%
Straddie Salute	5	0.8%	21	2.4%	18	3.0%
Island Elements Festival	5	0.8%	11	1.2%	-	-
Schoolies or pre-schoolies	4	0.6%	9	1.0%	9	1.5%
Wedding of private event	-	-	30	3.4%	5	0.8%
Other	15	2.3%	21	2.4%	38	6.2%

Source: NSI Visitor Survey

Potential visitors were asked to select events and festivals that would attract them to the island (Table 54). Consistent with findings elsewhere in this report, markets selling local food and products resonated strongly with potential visitors. Consistent with previous survey rounds, there was also strong interest in a seafood festival, music festival, and arts and craft festival. Minjerribah hosts an annual Oyster Festival but the event has a low profile and there is scope to broaden the festival program and to increase awareness of the event on the mainland. Alternatively, a seafood festival timed to coincide with the annual mullet run could be linked to the history and culture of the island. There was also some support for an Indigenous festival and a health and wellbeing festival, highlighting opportunities to further develop the Quandamooka Festival and the Island Elements Festival.

Table 54. Festival and events preferences of online panel

Online Panel	Round 1		Round 2		Round 3	
	N	Percent	N	Percent	N	Percent
Local markets	235	57.5%	391	59.6%	334	51.2%
Music festival	137	33.5%	241	36.7%	195	29.9%
Seafood festival	169	41.3%	230	35.1%	225	34.5%
Arts and crafts festival	132	32.3%	178	27.1%	161	24.7%
Indigenous festival	87	21.3%	138	21.0%	162	24.8%
Health and wellbeing festival	85	20.8%	120	18.3%	111	17.0%
Fishing competition	57	13.9%	76	11.6%	56	8.6%
Fringe festival	53	13.0%	72	11.0%	68	10.4%
Running, cycling, swimming or triathlon	41	10.0%	66	10.1%	62	9.5%
Sports tournament	26	6.4%	65	9.9%	40	6.1%
Regatta	39	9.5%	50	7.6%	40	6.1%
Other	11	2.7%	28	4.3%	25	3.8%

Source: Online Survey Panel

Further analysis reveals that the appeal of events and festivals varied across different family lifecycle stages (Table 55). Support for local markets was strong across all lifecycle stages, while health and wellbeing appealed younger couples and older singles. Support for a seafood festival was stronger for later stages of the family life cycle while interest in an Indigenous was strongest for older singles.

Table 55. Festival and events preferences by family lifecycle

Online Panel	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Local markets	44.8%	53.6%	53.1%	55.4%	55.7%	41.8%	55.0%
Music festival	26.0%	44.0%	24.5%	31.3%	32.0%	18.4%	30.0%
Seafood festival	21.9%	31.0%	34.7%	30.0%	38.5%	44.9%	45.0%
Arts and crafts festival	21.9%	29.8%	28.6%	21.4%	25.4%	21.4%	28.3%
Indigenous festival	22.9%	21.4%	22.4%	21.4%	27.9%	23.5%	35.0%
Health & wellbeing festival	13.5%	20.2%	8.2%	13.4%	18.0%	17.3%	21.7%
Fishing competition	3.1%	8.3%	10.2%	6.3%	11.5%	11.2%	8.3%
Fringe festival	7.3%	14.3%	12.2%	6.3%	13.9%	8.2%	10.0%
Running, cycling, etc.	7.3%	14.3%	6.1%	4.5%	9.0%	12.2%	6.7%
Sports tournament	5.2%	3.6%	12.2%	7.1%	8.2%	2.0%	3.3%
Regatta	7.3%	4.8%	8.2%	3.6%	5.7%	7.1%	5.0%
Other	2.1%	2.4%	6.1%	0.0%	4.9%	8.2%	6.7%

Source: Online Survey Panel

Higher yield markets are more likely to be attracted by markets, festivals and events that have a focus on seafood, arts and crafts, or Indigenous culture (Table 56).

Table 56. Festival and events preferences by daily spend

Online Panel	Up to $135	$136-$235	Over $235
Local markets	42.1%	55.2%	64.4%
Music festival	29.8%	42.5%	34.1%
Seafood festival	42.1%	37.9%	42.8%
Arts and crafts festival	17.5%	26.4%	30.5%
Indigenous festival	19.3%	17.2%	33.2%
Health & wellbeing festival	15.8%	17.2%	20.4%
Fishing competition	8.8%	12.6%	9.9%
Fringe festival	8.8%	8.0%	14.4%
Running, cycling, etc.	8.8%	10.3%	12.6%
Sports tournament	3.5%	10.3%	8.1%
Regatta	5.3%	5.7%	8.4%
Other	12.3%	4.6%	2.7%

Source: Online Survey Panel

Current visitors also provided suggestions for events and festivals on the island. These suggestions included a weekly food market or night markets and festivals focused on Indigenous culture, seafood, surfing, music and film. However, similar to previous rounds, several visitors also indicated that they enjoyed the peace and quiet and were concerned that more events would lead to crowding and congestion.

Focus group participants showed low awareness of many of the major events on the island. Several participants from the non-visitor group suggested events that already exist on the island (e.g. an Indigenous festival). Suggestions focussed on events that would be distinctive to the island. Distinctive elements that could form the basis for future events include whales, dolphins, wildlife, beaches and the Quandamooka people. There were also suggestions for water sports events such as triathlons and beach-related events such as a sand/beach art festival or a sandcastle festival.

3.6.6 Food and Dining

A number of issues related to food and dining have already been identified elsewhere in this report. The results in Table 57 provide more detail about the food and dining preferences of current visitors. Many visitors dined at restaurants and cafés (52.5%) or ordered takeaway food (45.6%) from businesses on the island. However, almost half also consumed groceries bought on the mainland. Several visitors specifically mentioned buying fresh seafood and ice cream while they were on the island.

Table 57. Current Visitors food and dining preferences

Current Visitors	Round 1		Round 2		Round 3	
	N	Percent	N	Percent	N	Percent
Dining in restaurants/cafés	395	60.9%	467	52.4%	320	52.5%
Groceries bought on mainland	335	51.6%	487	54.7%	299	49.1%
Takeaway bought on island	283	43.6%	353	39.6%	278	45.6%
Groceries bought on island	305	47.0%	383	43.0%	250	41.1%
Ice cream			337	37.8%	232	38.1%
Seafood collected on island	88	13.5%	138	15.5%	117	19.2%
Dining with friends/relatives on island	107	16.5%	127	14.3%	116	19.0%
Other	17	2.6%	51	5.7%	14	2.3%

Source: NSI Visitor Survey

Potential visitors were not asked about their food and dining preferences. However, Table 58 provides a summary of the food preferences of current visitors by family lifecycle. The results indicate that families are most likely to bring groceries from the mainland, however they are also most likely to purchase groceries and takeaway on the island. Families with pre-school children (Family Nest I) were less likely than most other lifecycle segments to buy groceries on the island or to dine at restaurants and cafés. Empty nesters were more likely to purchase food locally on the island.

Table 58. Food and dining preferences by family lifecycle

Current Visitors	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Dining in restaurants/cafés	42.7%	60.3%	44.0%	57.4%	62.7%	56.5%	53.2%
Groceries bought on mainland	52.4%	43.8%	56.0%	51.5%	60.8%	38.8%	57.4%
Takeaway bought on island	41.1%	52.1%	44.0%	42.6%	52.0%	48.2%	44.7%
Groceries bought on island	45.2%	37.0%	24.0%	38.6%	49.0%	42.4%	44.7%
Ice cream	41.1%	32.9%	32.0%	42.6%	50.0%	30.6%	31.9%
Seafood collected on island	12.1%	19.2%	28.0%	22.8%	26.5%	20.0%	23.4%
Friends/relatives on island	18.5%	16.4%	12.0%	24.8%	21.6%	21.2%	12.8%
Other	0.8%	1.4%	4.0%	4.0%	3.9%	0.0%	4.3%

Source: NSI Visitor Survey

A comparison of food preferences for low-yield and high-yield markets demonstrates the importance of offering a variety of restaurants, cafés, and takeaway options to attract higher yield markets (Table 59).

Table 59. Food and dining preferences by daily spend

Current Visitors	Up to $135	$136-$235	Over $235
Dining in restaurants and cafés	40.6%	60.6%	71.1%
Takeaway bought on the island	41.3%	45.3%	57.8%
Groceries bought on the mainland	48.0%	56.9%	49.7%
Groceries bought from shops on the island	40.9%	42.3%	44.5%
Ice cream	35.2%	41.6%	43.9%
Seafood caught or collected on the island	17.1%	20.4%	23.7%
Dining with friends or relatives from the island	26.7%	12.4%	13.9%
Other	3.2%	1.5%	1.7%

Source: NSI Visitor Survey

TripAdvisor reviews for restaurants on the island identified a number or issues. The average rating of 4.16/5.00 reported earlier in this report was lower than for some of the other benchmark island destinations but has shown some recent improvement (see 'Improving the Experience' below). An analysis of negative reviews (ratings between 1 and 3) revealed several themes that require further attention (Figure 29).

Figure 29. Negative TripAdvisor reviews for food and dining

Negative reviews were more evident during peak visitation periods (i.e. December/January), highlighting the need to manage staffing and quality during these times. Most negative reviews can be grouped into five broad areas:

- **Service quality:** long waiting times for tables, service and orders and lazy or rude staff who were poorly groomed/dressed.
- **Cleanliness:** flies; dirty/uncleaned/sticky tables, chairs, floors and/or premises.
- **Food quality**: meals cold, overcooked, undercooked, not fresh, not as ordered, etc.
- **Cost:** overpriced meals for the quality received, poor value for money.
- **Trading hours:** many comments about limited trading hours, particularly on weekdays and at night.

While these reviews highlight areas for improvement, it must be noted that there were many more positive reviews about dining on the island.

Current visitors provided several suggestions for improving food and dining on the island (Figure 30).

Figure 30. Food and dining improvements

These suggestions from all three rounds of data collection can be grouped under the following key themes:

- **Variety:** more dining options, including Indigenous-inspired menu items, locally grown/harvested food, seafood, vegetarian options, gluten free, fresh/healthy/organic food, pop up cafes and food stalls during busy periods.
- **Groceries:** better grocery stores with competitively priced fresh food and a delivery service so visitors do not need to bring food from mainland.
- **Trading hours:** more family friendly opening hours
- **Location:** restaurants and cafés that offer ocean views

The focus group interviews identified that many non-visitors had a complete lack of awareness of about grocery stores and dining options on the island. Past visitors explained that they took their own food when camping because the food options on the island were perceived to be expensive, poor quality or limited in choice. There is also limited online information about shops, grocery stores, opening hours, prices and products available on the island. The dominant styles of accommodation on the island are closely associated with self-catering options. Improvements in this area should focus not only on expanding the variety of restaurants and cafés, but also on promoting existing food and dining options more effectively.

3.6.7 Local Products

One of the key goals in the ETS is to "export knowledge, culture, arts, goods and services that reflect the island's unique qualities." As noted in the Destination Sentiment section earlier in this report, many successful destinations offer local products that become part of the destination brand. Visitors like to purchase souvenirs as a physical reminder of their trip. Local food, produce and products are part of the mix of ingredients that make a destination unique. Products that are unique to a destination – that cannot be purchased anywhere else – convey an element of authenticity and exclusivity. From a pragmatic perspective, these local products can become an important revenue stream, creating local employment and economic benefit.

To explore whether there was an interest in local products, current visitors were asked to indicate which products they purchased while on the island. Potential visitors were asked about the products they would be interested in buying. Table 60 indicates that local food or produce were important to both current and potential visitors. Potential visitors also showed some interested in clothing, arts and crafts, home and garden wares and Aboriginal arts and crafts, indicating opportunities to develop these areas further.

Table 60. Shopping and local products

Current Visitors	Current Visitors			Online Panel		
	Round 1	Round 2	Round 3	Round 1	Round 2	Round 3
Local food or produce	61.9%	49.0%	60.9%	75.6%	74.7%	68.7%
Clothing	15.6%	11.0%	11.0%	41.1%	36.7%	32.8%
Pharmaceuticals/cosmetics	3.7%	10.2%	7.7%	12.5%	10.5%	8.0%
Arts and crafts	7.4%	9.1%	12.2%	45.7%	39.2%	37.0%
Aboriginal arts and crafts	4.6%	3.7%	7.7%	36.9%	29.0%	31.4%
Toys	3.9%	2.5%	3.0%	15.6%	9.8%	10.1%
Home and garden wares	5.7%	2.1%	3.8%	30.1%	29.1%	25.8%
Other	1.7%	5.2%	3.6%	2.4%	1.8%	2.5%

Source: NSI Visitor Survey, Online Panel

An analysis of the potential demand for shopping and local products by family lifecycle identifies strong support for local food and produce for all lifecycle stages except young singles and empty nesters (Table 61). Younger families (Full Nest I and II) are more interested in purchasing toys than other segments.

Table 61. Shopping and local product preferences by family lifecycle

Online Panel	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Local food/produce	64.6%	75.0%	75.5%	72.3%	68.9%	62.2%	68.3%
Arts and crafts	30.2%	42.9%	38.8%	38.4%	44.3%	30.6%	35.0%
Clothing	28.1%	34.5%	46.9%	30.4%	41.8%	21.4%	31.7%
Aboriginal arts & crafts	32.3%	32.1%	34.7%	31.3%	35.2%	26.5%	31.7%
Home & garden wares	17.7%	28.6%	32.7%	27.7%	29.5%	17.3%	28.3%
Pharma/cosmetics	2.1%	8.3%	8.2%	8.0%	11.5%	9.2%	5.0%
Toys	4.2%	6.0%	30.6%	18.9%	9.8%	3.1%	0.0%
Other	3.1%	0.0%	4.1%	0.0%	3.3%	2.0%	8.3%

Source: Online Survey Panel

Not surprisingly, a comparison of the shopping and local product preferences of low-yield and high-yield potential visitors reveals that higher yield visitors have a stronger interest in most product categories (Table 62).

Table 62. Shopping and local product preferences by daily spend

Online Panel	Up to $135	$136-$235	Over $235
Local food or produce	70.2%	83.9%	81.4%
Arts and crafts	31.6%	29.9%	47.6%
Clothing	31.6%	37.9%	39.8%
Aboriginal arts and crafts	19.3%	35.6%	40.7%
Home and garden wares	17.5%	25.3%	34.1%
Pharmaceuticals/cosmetics	1.8%	10.3%	10.2%
Toys	8.8%	8.0%	12.3%
Other	7.0%	2.3%	2.1%

Source: Online Survey Panel

3.6.8 Improving the Experience

The CSIRO's (2013) report on the future of tourism in Queensland highlights that visitors of the future will have expectations for authentic, personalised and friendly experiences. The findings presented in this section point to a number of opportunities to enhance specific aspects of the visitor experience on the island. To get a broader overview of the areas that most need to be improved, current visitors were asked to suggest two things that could be improved. The comments are presented as a word cloud in Figure 31.

Figure 31. Overall suggestions for improvement

The results are very consistent with the issues identified in previous data collection rounds and many of the improvements have been discussed above. Areas that require the most improvement include the cost of transport (bus and ferry), camping facilities, dining options, service delivery, trading hours, mobile phone and Wi-Fi coverage, and public facilities such as terminals, public toilets and parking.

Analysis of the TripAdvisor data provides additional insight into reviewer ratings for accommodation, restaurants, and activities over time (Figure 32). The results confirm consistently high ratings for activities and improving ratings for restaurants and accommodation.

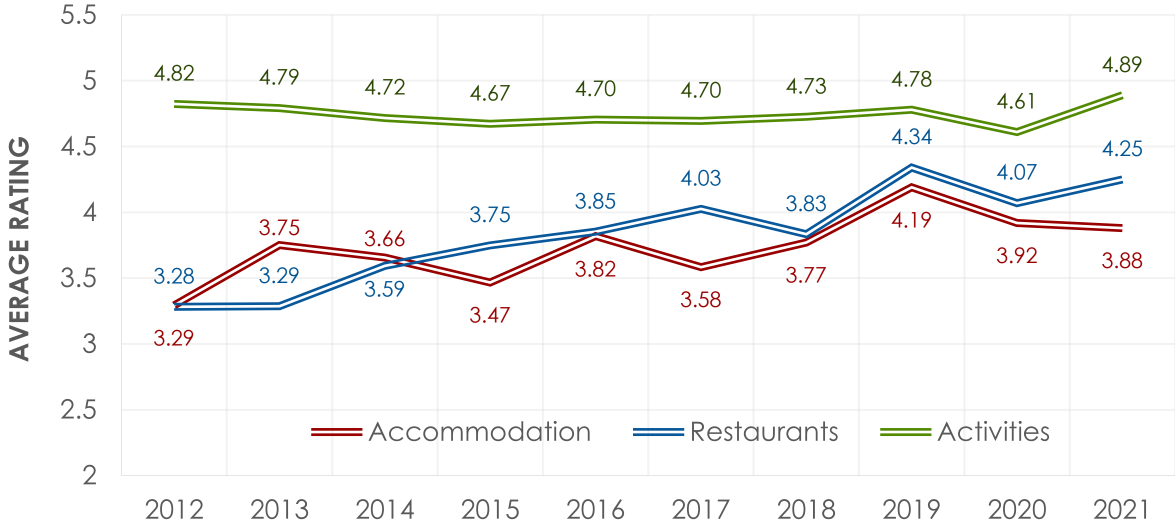


Figure 32. TripAdvisor rating trends

The Online Survey Panel also asked respondents who did not intend to visit (or were not sure) to suggest improvements. The most common suggestions fell into three key areas. The first area of improvement included suggestions for better **visitor information**, for example:

- Better awareness of how to get there, if you need a 4wd vehicle, and what activities are available
- If I knew more about the transport, accommodation, and activities I'd definitely be interested
- More marketing/advertising as I'm not currently aware this is a tourist destination
- More information on logistics of how a normal family of four can take a normal car and have fun and what I need to take to make the experience as amazing as possible

The second area of improvement was **accessibility**, for example:

- Options of getting there and getting around
- Ferry from the Gold Coast
- More ferries from further North
- Reasonable public transport costs and availability where I live

The final area of improvement was to reduce the **cost** of visiting Minjerribah, for example:

- Affordable bus trips for pensioners
- Affordable transport from Redcliffe
- Cheaper ferry fares and accommodation.

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Appendices

NORTH STRADBROKE ISLAND VISITOR RESEARCH PROGRAM

Queensland Government | The University of Queensland Australia — Create change

This survey seeks your views about North Stradbroke Island (Minjerribah) and should take no more than **20 minutes** to complete. The survey is a part of the Queensland Government's **North Stradbroke Island Economic Transition Strategy** (www.statedevelopment.qld.gov.au). This project is being led by The University of Queensland's Visitor Research Group. Your answers will help the government and local community to plan and promote tourism and events on the island.

OCT/1 FER 2020

SECTION 1: THE ISLAND

1. What **information sources** did you use to plan your trip **before** and **during** your visit to *North Stradbroke Island*?

BEFORE	DURING	
○	○	Stradbroke Island website - stradbrokeisland.com
○	○	Redlands Coast website - visitredlandscoast.com.au
○	○	Google or Google Maps
○	○	Ferry website
○	○	Holiday rental website
○	○	Private accommodation website (e.g. AirBnB, Stayz)
○	○	Social media (e.g. Facebook, Instagram)
○	○	Travel blogs, forums or review sites (e.g. TripAdvisor)
○	○	Online videos (e.g. YouTube)
○	○	Other websites – please tell us which website you used most: ....
○	○	Mobile apps – please tell us which apps you used most: ....
○	○	Email newsletters
○	○	Visitor information centre
○	○	Travel agent or motoring club (e.g. RACQ, NRMA)
○	○	Newspapers or magazines
○	○	Television or radio
○	○	Brochures or visitor guides
○	○	Billboards or signage
○	○	National parks brochures or signage
○	○	Family or friends
○	○	Local businesses or residents
○	○	Other ....

2. What **additional information** would you have liked **before** or **during** your stay on the island?

....

....

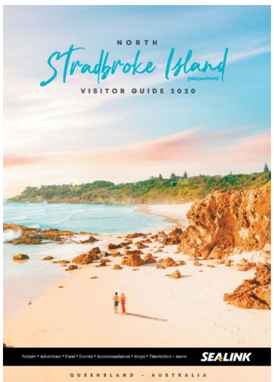
3. Do you recall seeing any **advertising** about *North Stradbroke Island* before your visit? Please tell us more about this.

....

....

4. Do you recall seeing any of the following advertisements or brands in the last 12 months?

○ Yes ○ No



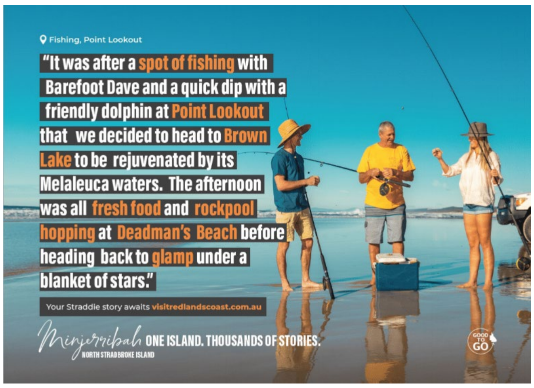
○ Yes ○ No

MINJERRIBAH CAMPING

○ Yes ○ No

Redlands coast naturally wonderful

○ Yes ○ No



5. Did you use any of the **devices** listed below for the following tasks **during** your visit to the island? (Tick all that apply)

MOBILE	TABLET	LAPTOP	
◯	◯	◯	Finding information about the island
◯	◯	◯	Finding out about events and activities
◯	◯	◯	Booking accommodation or transport
◯	◯	◯	Reading reviews of activities or restaurants
◯	◯	◯	Finding my way (i.e. maps and navigation)
◯	◯	◯	Sharing experiences on social media (e.g. Facebook, Instagram, etc.)

6. The following is a list of **reasons** why people might visit *North Stradbroke Island*. On the **left**, we would like you to think about how **important** each item is to your decision to visit, then on the **right** we would like you to indicate how well you think North Stradbroke Island **performs** on each item.

How **important** is each item to your decision to visit the island? NOT AT ALL IMPORTANT → VERY IMPORTANT					REASONS	How well do you think the island **performs** on each item? VERY POOR → EXCEPTIONAL					NOT SURE
◯	◯	◯	◯	◯	A good place to be with family or friends	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Escaping from city life	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Somewhere to rest and relax	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Meeting local people	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Experiencing new things	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Enjoying the scenery	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Being close to nature	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Learning about Aboriginal culture	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Going on an adventure	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Feeling that I belong	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Having a romantic holiday	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Reliving memories from past trips	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Enjoying the outdoors	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Learning about the island	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Meeting other visitors	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Spending time on my own	◯	◯	◯	◯	◯	◯

SECTION 2: YOUR VISIT

7. What was the **primary reason** for visiting the island on this trip? (Tick one only)

◯ Holiday/leisure
◯ Attending an event
◯ Visiting friends or relatives
◯ Work, business or meeting with colleagues
◯ Education, school/university group or research
◯ Other ....

8. How did you get **to the island**? Include transport on the mainland as well as water transport. (Tick all that apply)

◯ Water taxi
◯ Car ferry
◯ Own vehicle (e.g. car, motorcycle, campervan)
◯ Train
◯ Bus
◯ Private vessel
◯ Rental vehicle
◯ Other ....

9. How did you get **around the island**? (Tick all that apply)

◯ Bus
◯ Own vehicle (e.g. car, motorcycle, campervan)
◯ Rental vehicle
◯ Local resident's vehicle
◯ Bicycle
◯ Taxi
◯ Walking
◯ Other ....

10. What improvements to **transport** options would you like to see (if any)?

....

....

....

11. How many **nights** did you spend on the island?

- ◯ None, just visited for the day → Skip to Question 14
- ◯ I/we spent .... nights on the island

12. What **accommodation** did you use on this visit? (Tick all that apply)

- ◯ Tent, camping or glamping
- ◯ Caravan park
- ◯ Cabin
- ◯ Own property
- ◯ Backpacker accommodation
- ◯ Hotel or resort
- ◯ Holiday rental
- ◯ Apartment
- ◯ Boat or yacht
- ◯ Bed and breakfast or guest house
- ◯ Visiting friends or relatives
- ◯ Other ....

13. What improvements to **accommodation** options would you like to see on the island (if any)?

....

....

14. Which of the following **places** did you visit on this trip to North Stradbroke Island? (Tick all that apply)

- ◯ Point Lookout
- ◯ Amity Point
- ◯ Dunwich
- ◯ North Gorge Walk
- ◯ Cylinder Beach
- ◯ Main Beach
- ◯ Home Beach
- ◯ Frenchman's Beach
- ◯ Deadman's Beach
- ◯ Adder Rock
- ◯ Blue Lake
- ◯ Brown Lake
- ◯ North Stradbroke Island Historical Museum
- ◯ Myora Springs Conservation Area
- ◯ Naree Budjong Djara National Park
- ◯ Other ....

15. Which of the following **activities** did you do on this visit to North Stradbroke Island? (Tick all that apply)

- ◯ Spotting wildlife on the island
- ◯ Watching whales, dolphins and turtles
- ◯ Bird watching
- ◯ Snorkelling or diving
- ◯ Bush walking
- ◯ Camping
- ◯ Attending an event or festival
- ◯ Shopping
- ◯ Dining
- ◯ Work, study or research
- ◯ Learning about Aboriginal culture
- ◯ Water sports (e.g. swimming, kayaking, surfing)
- ◯ Land-based sports (e.g. tennis, golf, jogging, cycling, football)
- ◯ Visiting museums and art galleries
- ◯ Four-wheel-driving
- ◯ Markets
- ◯ Fishing and boating
- ◯ Massage and spa treatments
- ◯ Organised tour
- ◯ Relaxing or walking at a beach
- ◯ Visiting friends or relatives
- ◯ Other ....

16. If the following **experiences** were available on the island how likely would you be to participate in them?

	NOT AT ALL LIKELY				VERY LIKELY	NOT SURE
Go on an island tour with an Aboriginal Guide	◯	◯	◯	◯	◯	◯
Stay in Aboriginal owned or operated accommodation	◯	◯	◯	◯	◯	◯
Visit an Aboriginal cultural centre or gallery	◯	◯	◯	◯	◯	◯
See an Aboriginal dance, music or cultural performance	◯	◯	◯	◯	◯	◯
Visit an Aboriginal cultural site	◯	◯	◯	◯	◯	◯
Purchase locally produced Aboriginal art/craft or souvenirs	◯	◯	◯	◯	◯	◯
Learn about or try Aboriginal bush tucker	◯	◯	◯	◯	◯	◯
Learn about boomerangs, spears or other weapons	◯	◯	◯	◯	◯	◯
Go on an Aboriginal owned or operated whale watching tour	◯	◯	◯	◯	◯	◯

17. How much do you know about the **Aboriginal community** of North Stradbroke Island? (Tick one only)

- ◯ Strong knowledge of local Aboriginal community and traditions
- ◯ Aware that there is a local Aboriginal community
- ◯ Unaware of any local Aboriginal community or tradition
- ◯ Could not say

PLEASE TURN OVER

18. What new **activities**, **facilities** or **experiences** would you like to see on the island (if any)?

....

....

19. What **food and drinks** did you consume while on the Island? (Tick all that apply)

- ◯ Groceries bought on the mainland
- ◯ Groceries bought from shops on the island
- ◯ Dining in restaurants and cafés
- ◯ Takeaway bought on the island
- ◯ Dining with friends or relatives from the island
- ◯ Seafood caught or collected on the island
- ◯ Ice cream
- ◯ Other ....

20. What improvements in **food and dining** would you like to see on the island (if any)?

....

....

21. Did you attend any of the following **events** while on the island? (Tick all that apply)

- ◯ Point Lookout Markets
- ◯ Straddie Assault
- ◯ Straddie Salute
- ◯ Stradbroke Chamber Music Festival
- ◯ Quandamooka Festival
- ◯ Island Vibe Festival
- ◯ Island Elements Festival
- ◯ Schoolies or pre-schoolies
- ◯ Wedding or private event
- ◯ Other ....

22. What improvements or new **events** would you like to see on the island (if any)?

....

....

23. Which of the following **products** did you buy on the island? (Tick all that apply)

- ◯ Local food or produce
- ◯ Arts and crafts
- ◯ Aboriginal arts and crafts
- ◯ Home and garden wares
- ◯ Clothing
- ◯ Toys
- ◯ Pharmaceuticals or cosmetics
- ◯ Other ....

24. For your entire stay on the island, please estimate in Australian dollars how much you have **spent** on:

Getting to the island	$ ....
Getting around the island	$ ....
Food and drinks	$ ....
Shopping	$ ....
Fuel	$ ....
Accommodation	$ ....
Entry fees, activities and tours	$ ....

25. What other **destinations** did you **consider** when planning your trip to *North Stradbroke Island*? (Tick all that apply)

- ◯ Brisbane
- ◯ Gold Coast
- ◯ Sunshine Coast/Noosa
- ◯ Northern NSW/Byron Bay
- ◯ Bribie Island
- ◯ Fraser Island/Rainbow Beach
- ◯ Moreton Island
- ◯ Overseas Island destinations (e.g. Bali, Fiji, Vanuatu)
- ◯ None, North Stradbroke Island was my only choice
- ◯ Other ....

26. What other **destinations** are you **visiting** as part of this trip? (Tick all that apply)

- ◯ None, only visiting North Stradbroke Island
- ◯ Brisbane
- ◯ Gold Coast
- ◯ Sunshine Coast
- ◯ Other ....

27. Have you visited the island before?

- ◯ No, first time → Skip to Question 29
- ◯ Yes, once before
- ◯ Yes, 2 to 5 times
- ◯ More than 5 times

What **year** did you first visit? ....

28. How often do you visit the island?

- ◯ Every few years
- ◯ Once a year
- ◯ Twice a year
- ◯ More than twice a year

Which months do you normally visit?

J	F	M	A	M	J	J	A	S	O	N	D
◯	◯	◯	◯	◯	◯	◯	◯	◯	◯	◯	◯

29. Please rate each of the destination **characteristics** below in terms of how **important** they are to you and how well you think *North Stradbroke Island* **performs** on each item.

How **important** is each item to your decision to visit the island? NOT AT ALL IMPORTANT				VERY IMPORTANT	CHARACTERISTICS	How well do you think the island **performs** on each item? VERY POOR				EXCEPTIONAL	NOT SURE
◯	◯	◯	◯	◯	Island atmosphere	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Value for money	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Close proximity to home	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Affordability	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Aboriginal culture	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Birds, marine life and wildlife	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Water activities (e.g. swimming, surfing)	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Land-based activities (e.g. walking trails)	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	National parks	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Friendly local people	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Clean beaches	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Nightlife	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Environmentally-friendly practices	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Easy access and transport	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Affordable transport	◯	◯	◯	◯	◯	◯

30. Next, we would like you to rate each of the destination **facilities** below in terms of how **important** they are to you and how well you think *North Stradbroke Island* **performs** on each item.

How **important** is each item to your decision to visit the island? NOT AT ALL IMPORTANT				VERY IMPORTANT	FACILITIES	How well do you think the island **performs** on each item? VERY POOR				EXCEPTIONAL	NOT SURE
◯	◯	◯	◯	◯	Island shops and products	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Festivals, events and entertainment	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Variety of places to eat	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Quality accommodation	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Camping facilities	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Fishing spots and boating facilities	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Luxury resorts	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Health and beauty spas	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	WiFi / mobile phone coverage	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Public amenities (e.g. parks, toilets)	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Information and signage	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Places for kids to play	◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	Walking and bicycle trails	◯	◯	◯	◯	◯	◯

31. Use the space below to tell us the two **best** things about your visit to *North Stradbroke Island*.

1. ....

2. ....

32. List two things about *North Stradbroke Island* that could be **improved.**

1. ....

2. ....

PLEASE TURN OVER

33. Please indicate your level of agreement with each of the following statements.

	STRONGLY DISAGREE						STRONGLY AGREE
I will recommend North Stradbroke Island to my family and friends	○	○	○	○	○	○	○
I would like to visit the island again	○	○	○	○	○	○	○
I would buy products from the island if they were available at home	○	○	○	○	○	○	○
I would like to order island products online for delivery to my home	○	○	○	○	○	○	○
The island is one of Australia's best kept secrets	○	○	○	○	○	○	○
The island is one of Australia's best island destinations	○	○	○	○	○	○	○
The island is one of Australia's best nature-based destinations	○	○	○	○	○	○	○
The island is one of Australia's best beach destinations	○	○	○	○	○	○	○
The island is one of Australia's best wildlife destinations	○	○	○	○	○	○	○
The island is rich in Aboriginal culture	○	○	○	○	○	○	○
The island offers unique experiences	○	○	○	○	○	○	○
The island offers many attractions and activities	○	○	○	○	○	○	○
Overall, I am very satisfied with my visit to the island	○	○	○	○	○	○	○

SECTION 3: ABOUT YOU

34. What is your gender?
- ○ Female
- ○ Male
- ○ Prefer not to say

35. In what year were you born? ....

36. Where do you usually live?
- ○ Australia. Please provide your postcode: ....
- ○ Overseas. Please tell us which country:

....

37. Before today, had you heard the term 'Quandamooka'?
- ○ Yes
- ○ No

38. Are you of Aboriginal or Torres Strait Islander origin?
- ○ Yes
- ○ No

39. Are you a member of the Quandamooka people?
- ○ Yes
- ○ No

40. How many people are you travelling with today? ....

41. Would you visit North Stradbroke Island again?
- ○ Yes, within the next 12 months
- ○ Yes, within the next 5 years
- ○ Yes, not sure when
- ○ Not Sure
- ○ No

42. What is the employment status of the main income earner in your household?
- ○ Unemployed
- ○ Studying
- ○ Working part-time
- ○ Working full-time
- ○ Retired
- ○ Prefer not to say
- ○ Other ....

43. What is the current combined income of everyone in your household before tax (in Australian dollars)?
- ○ Less than $50,000
- ○ $50,001 to $80,000
- ○ $80,001 to $110,000
- ○ $110,001 to $140,000
- ○ $140,001 to $170,000
- ○ $170,001 to $200,000
- ○ Above $200,000
- ○ Prefer not to say

44. Do you have children either living in or outside of your household?
- ○ No → Skip to Question 46
- ○ Yes

45. Which of the following age groups do your children fall into? (Tick all that apply)
- ○ Under 5 years
- ○ 5 to 14 years
- ○ 15 to 17 years
- ○ 18+ years

46. Which of the following best describes your household?
- ○ Living with my parents or boarding
- ○ Living alone
- ○ Living in a shared adult house
- ○ Living with my partner
- ○ Living with my partner and children
- ○ Living with my children

47. Which of the following best describes the group you are travelling with today?
- ○ I am visiting alone
- ○ I am visiting with my partner
- ○ I am visiting with my partner and children
- ○ I am visiting with my extended family
- ○ I am visiting with a group of friends
- ○ I am with a school/university group
- ○ I am visiting with business associates
- ○ I am with an organised tour or group
- ○ Other: ....

APPENDIX 2: SAMPLE ONLINE PANEL SURVEY

NORTH STRADBROKE ISLAND VISITOR RESEARCH PROGRAM

Queensland Government | The University of Queensland Australia — Create change

This survey seeks your views about North Stradbroke Island (Minjerribah) and should take no more than **15 minutes** to complete. The survey is a part of the Queensland Government's **North Stradbroke Island Economic Transition Strategy** (www.statedevelopment.qld.gov.au). This project is being led by The University of Queensland's Visitor Research Group. Your answers will help the government and local community to plan and promote tourism and events on the island.

NVS 2020

SECTION 1: THE ISLAND

1. Have you visited *North Stradbroke Island* before?

- ○ No, never heard of it!
- ○ No, but I've heard of it!
- ○ Yes, once before
- ○ Yes, 2 to 5 times
- ○ More than 5 times

What year did you **first** visit? ....

What year did you **last** visit? ....

2. Do you intend to visit *North Stradbroke Island* in the future?

- ○ No
- ○ Not sure
- ○ Yes, within the next 12 months
- ○ Yes, within the next 5 years
- ○ Yes, not sure when

Tell us why you do not intend to visit the island?

Can you think of any changes or improvements to transport, accommodation or activities that might tempt you to visit the island?

3. What three words or phrases would you use to **describe** *North Stradbroke Island*?

1. ....
2. ....
3. ....

4. What three words or phrases would you use to describe the **typical visitor** to *North Stradbroke Island*?

1. ....
2. ....
3. ....

5. Please indicate your level of agreement with each of the following statements.

	STRONGLY DISAGREE						STRONGLY AGREE
I would like to visit North Stradbroke Island	○	○	○	○	○	○	○
I would buy products from the island if they were available at home	○	○	○	○	○	○	○
I would like to order island products online for delivery to my home	○	○	○	○	○	○	○
The island is one of Australia's best kept secrets	○	○	○	○	○	○	○
The island is one of Australia's best island destinations	○	○	○	○	○	○	○
The island is one of Australia's best nature-based destinations	○	○	○	○	○	○	○
The island is one of Australia's best beach destinations	○	○	○	○	○	○	○
The island is one of Australia's best wildlife destinations	○	○	○	○	○	○	○
The island is rich in Aboriginal culture	○	○	○	○	○	○	○
The island offers unique experiences	○	○	○	○	○	○	○
The island offers many attractions and activities	○	○	○	○	○	○	○
I am very familiar with North Stradbroke Island	○	○	○	○	○	○	○
Overall, my impression of North Stradbroke Island is positive	○	○	○	○	○	○	○

6. The following is a list of **reasons** why people might visit *North Stradbroke Island*. On the **left**, we would like you to think about how **important** each item is to you when you choose a holiday destination, then on the **right** we would like you to indicate how well you think North Stradbroke Island **performs** on each item.

How **important** is each item when you choose a holiday destination?						How well do you think the island **performs** on each item?					
NOT AT ALL IMPORTANT				VERY IMPORTANT	REASONS	VERY POOR				EXCEPTIONAL	NOT SURE
○	○	○	○	○	A good place to be with family or friends	○	○	○	○	○	○
○	○	○	○	○	Escaping from city life	○	○	○	○	○	○
○	○	○	○	○	Somewhere to rest and relax	○	○	○	○	○	○
○	○	○	○	○	Meeting local people	○	○	○	○	○	○
○	○	○	○	○	Experiencing new things	○	○	○	○	○	○
○	○	○	○	○	Enjoying the scenery	○	○	○	○	○	○
○	○	○	○	○	Being close to nature	○	○	○	○	○	○
○	○	○	○	○	Learning about Aboriginal culture	○	○	○	○	○	○
○	○	○	○	○	Going on an adventure	○	○	○	○	○	○
○	○	○	○	○	Feeling that I belong	○	○	○	○	○	○
○	○	○	○	○	Having a romantic holiday	○	○	○	○	○	○
○	○	○	○	○	Reliving memories from past trips	○	○	○	○	○	○
○	○	○	○	○	Enjoying the outdoors	○	○	○	○	○	○
○	○	○	○	○	Learning about the island	○	○	○	○	○	○
○	○	○	○	○	Meeting other visitors	○	○	○	○	○	○
○	○	○	○	○	Spending time on my own	○	○	○	○	○	○

7. Next, we would like you to rate each of the destination **characteristics** below in terms of how **important** they are to you when you choose a holiday destination and how well you think *North Stradbroke Island* **performs** on each item.

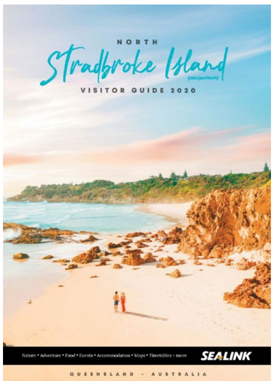
How **important** is each item when you choose a holiday destination?						How well do you think the island **performs** on each item?					
NOT AT ALL IMPORTANT				VERY IMPORTANT	CHARACTERISTICS	VERY POOR				EXCEPTIONAL	NOT SURE
○	○	○	○	○	Island atmosphere	○	○	○	○	○	○
○	○	○	○	○	Value for money	○	○	○	○	○	○
○	○	○	○	○	Close proximity to home	○	○	○	○	○	○
○	○	○	○	○	Affordability	○	○	○	○	○	○
○	○	○	○	○	Aboriginal culture	○	○	○	○	○	○
○	○	○	○	○	Island shops and products	○	○	○	○	○	○
○	○	○	○	○	Festivals, events and entertainment	○	○	○	○	○	○
○	○	○	○	○	Birds, marine life and wildlife	○	○	○	○	○	○
○	○	○	○	○	Variety of places to eat	○	○	○	○	○	○
○	○	○	○	○	Water activities (e.g. swimming, surfing)	○	○	○	○	○	○
○	○	○	○	○	Land-based activities (e.g. walking trails)	○	○	○	○	○	○
○	○	○	○	○	National parks	○	○	○	○	○	○
○	○	○	○	○	Quality accommodation	○	○	○	○	○	○
○	○	○	○	○	Camping facilities	○	○	○	○	○	○
○	○	○	○	○	Friendly local people	○	○	○	○	○	○
○	○	○	○	○	Fishing spots and boating facilities	○	○	○	○	○	○
○	○	○	○	○	Clean beaches	○	○	○	○	○	○
○	○	○	○	○	Luxury resorts	○	○	○	○	○	○
○	○	○	○	○	Health and beauty spas	○	○	○	○	○	○
○	○	○	○	○	Nightlife	○	○	○	○	○	○
○	○	○	○	○	WiFi / mobile phone coverage	○	○	○	○	○	○
○	○	○	○	○	Environmentally-friendly practices	○	○	○	○	○	○
○	○	○	○	○	Public amenities (e.g. parks, toilets)	○	○	○	○	○	○
○	○	○	○	○	Easy access and transport	○	○	○	○	○	○
○	○	○	○	○	Affordable transport	○	○	○	○	○	○
○	○	○	○	○	Information and signage	○	○	○	○	○	○
○	○	○	○	○	Places for kids to play	○	○	○	○	○	○
○	○	○	○	○	Walking and bicycle trails	○	○	○	○	○	○

SECTION 2: DESTINATION AWARENESS

8. Do you recall seeing any **advertising** about *North Stradbroke Island* in the last **12 months**? If yes, please tell us more about this advertising and where you saw it.

9. Do you recall seeing any of the following advertisements or brands in the last 12 months?

◯ Yes ◯ No



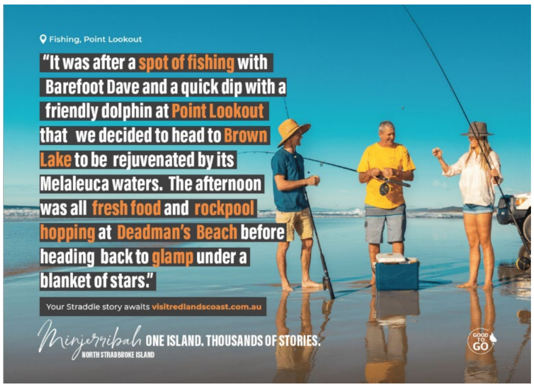
◯ Yes ◯ No

MINJERRIBAH CAMPING

◯ Yes ◯ No

Redlands coast
naturally wonderful

◯ Yes ◯ No



10. Which of the following images do you associate with *North Stradbroke Island*?

◯


◯


◯


◯


◯


◯


◯


◯


◯


11. Over the last 12 months do you recall seeing or hearing **any information** about North Stradbroke Island from the following sources (Select all that apply)

- ◯ North Stradbroke Island website - stradbrokeisland.com
- ◯ Internet advertisements
- ◯ Ferry website
- ◯ Holiday rental website
- ◯ Private accommodation website (e.g. AirBnB, Stayz)
- ◯ Social media (e.g. Facebook, Instagram)
- ◯ Travel blogs, forums or review sites (e.g. TripAdvisor)
- ◯ Online videos (e.g. YouTube)
- ◯ Online travel agents (e.g. Expedia, Booking.com, etc.)
- ◯ Other websites: ....
- ◯ Email newsletters
- ◯ Travel agent
- ◯ Visitor information centre
- ◯ Motoring club (e.g. RACQ, NRMA)
- ◯ Newspapers or magazines
- ◯ Television or radio
- ◯ Brochures or visitor guides
- ◯ Billboards or posters
- ◯ Family or friends
- ◯ Other sources: ....

12. If you did get an opportunity to visit the island, how many **nights** would you be willing to stay?

- ◯ None, I would just visit for the day → Skip to Question 14
- ◯ I would like to spend .... nights on the island

13. What **accommodation** would you be most likely to choose? (Select all that apply)

- ◯ Tent or camping
- ◯ Caravan park
- ◯ Cabin
- ◯ Own property
- ◯ Backpacker accommodation
- ◯ Hotel or resort
- ◯ Holiday rental
- ◯ Apartment
- ◯ Boat or yacht
- ◯ Bed and breakfast or guest house
- ◯ Visiting friends or relatives
- ◯ Other ....

14. Which of the following **activities** would attract you to the island? (Select all that apply)

- ◯ Spotting wildlife on the island
- ◯ Watching whales, dolphins and turtles
- ◯ Bird watching
- ◯ Snorkelling or diving
- ◯ Bush walking
- ◯ Camping
- ◯ Attending an event or festival
- ◯ Shopping
- ◯ Learning about Aboriginal culture
- ◯ Water sports (e.g. swimming, kayaking, surfing)
- ◯ Land-based sports (e.g. tennis, golf, jogging, cycling)
- ◯ Visiting museums and art galleries
- ◯ Four-wheel-driving
- ◯ Markets
- ◯ Fishing and boating
- ◯ Massage and spa treatments
- ◯ Organised tour
- ◯ Other ....

15. Which of the following kinds of **events** would attract you to the island? (Select all that apply)

- ◯ Indigenous festival
- ◯ Fringe festival
- ◯ Arts and crafts festival
- ◯ Music festival
- ◯ Seafood festival
- ◯ Fishing competition
- ◯ Regatta
- ◯ Health and wellbeing festival
- ◯ Local markets
- ◯ Running, cycling, swimming or triathlon
- ◯ Sports tournament
- ◯ Other ....

16. For your entire stay, please estimate in Australian dollars how much you would be willing to **spend** on:

Getting to the island	$ ....
Getting around the island	$ ....
Food and drinks	$ ....
Shopping	$ ....
Accommodation	$ ....
Entry fees, activities and tours	$ ....

17. Which of the following **products** would you be interested in buying on the island? (Select all that apply)

- ◯ Local food or produce
- ◯ Arts and crafts
- ◯ Aboriginal arts and crafts
- ◯ Home and garden wares
- ◯ Clothing
- ◯ Toys
- ◯ Cosmetics
- ◯ Other ....

18. How likely are you to visit each of the following destinations in the next five years?

	NOT AT ALL LIKELY						VERY LIKELY	NOT SURE
Sunshine Coast	○	○	○	○	○	○	○	○
Gold Coast	○	○	○	○	○	○	○	○
Whitsunday Islands	○	○	○	○	○	○	○	○
Great Barrier Reef	○	○	○	○	○	○	○	○
Byron Bay	○	○	○	○	○	○	○	○
Rainbow Beach	○	○	○	○	○	○	○	○
Magnetic Island	○	○	○	○	○	○	○	○
Fraser Island	○	○	○	○	○	○	○	○
Moreton Island	○	○	○	○	○	○	○	○
Kangaroo Island	○	○	○	○	○	○	○	○
North Stradbroke Island	○	○	○	○	○	○	○	○
Bribie Island	○	○	○	○	○	○	○	○
Lord Howe Island	○	○	○	○	○	○	○	○
Hawaii	○	○	○	○	○	○	○	○
Fiji	○	○	○	○	○	○	○	○
Vanuatu	○	○	○	○	○	○	○	○
Bali	○	○	○	○	○	○	○	○
New Caledonia	○	○	○	○	○	○	○	○

SECTION 3: ABOUT YOU

19. What is your gender?
- ○ Female
- ○ Male
- ○ Prefer not to say

20. In what year were you born? ....

21. Where do you usually live?
- ○ Australia. Please provide your postcode: ....
- ○ Overseas. Please tell us which country: ....

22. How much do you know about the Aboriginal community of North Stradbroke Island?
- ○ Strong knowledge of Aboriginal community & traditions
- ○ Aware that there is a local Aboriginal community
- ○ Unaware of any local Aboriginal community or tradition
- ○ Could not say

23. Before today, had you heard the term 'Quandamooka'?
- ○ Yes
- ○ No

24. Are you of Aboriginal or Torres Strait Islander origin?
- ○ Yes
- ○ No

25. Are you a member of the Quandamooka people?
- ○ Yes
- ○ No

26. Which of the following best describes the group you usually travel with when on holiday?
- ○ I usually travel alone
- ○ I usually travel with my partner
- ○ I usually travel with my partner and children
- ○ I usually travel with my extended family
- ○ I usually travel with a group of friends
- ○ I usually travel with an organised tour or group
- ○ Other: ....

27. Do you have children either living in or outside of your household?
- ○ No → Skip to Question 25
- ○ Yes

28. Which of the following age groups do your children fall into? (Select all that apply)
- ○ Under 5 years
- ○ 5 to 14 years
- ○ 15 to 17 years
- ○ 18+ years

29. Which of the following best describes your household?
- ○ Living with my parents or boarding
- ○ Living alone
- ○ Living in a shared adult house
- ○ Living with my partner
- ○ Living with my partner and children
- ○ Living with my children

30. What is the current combined income of everyone in your household before tax (in Australian dollars)?
- ○ Less than $50,000
- ○ $50,001 to $80,000
- ○ $80,001 to $110,000
- ○ $110,001 to $140,000
- ○ $140,001 to $170,000
- ○ $170,001 to $200,000
- ○ Above $200,000
- ○ Prefer not to say

31. What is the employment status of the main income earner in your household?
- ○ Unemployed
- ○ Studying
- ○ Working part-time
- ○ Working full-time
- ○ Retired
- ○ Prefer not to say
- ○ Other ....

Minjerribah Futures