



North Stradbroke Island Economic Transition Strategy

North Stradbroke Island Visitor Research Program

Round 1 Report
March 2018



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.

North Stradbroke Island Economic Transition Strategy

The North Stradbroke Island (NSI) Visitor Research Program is one of 23 projects being delivered under the Queensland Government's NSI Economic Transition Strategy (ETS). The ETS is being delivered by the Department of State Development, Manufacturing, Infrastructure and Planning (DSDMIP) and the NSI Visitor Research Program is being led by the Department of Innovation, Tourism Industry Development and the Commonwealth Games (DITID).

Stakeholder Reference Group

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- Department of State Development, Manufacturing, Infrastructure and Planning (DSDMIP)
- Tourism and Events Queensland (TEQ)
- Brisbane Marketing
- Redland City Council
- Quandamooka Yoolooburrabee Aboriginal Corporation (QYAC)
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Executive Summary

Background

North Stradbroke Island (NSI), or Minjerribah as the island is called by the Quandamooka people, 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 committed to phasing out sand mining on NSI and expanding the island's existing industries to ensure a strong, sustainable economy for the future. The NSI **Economic Transition Strategy (ETS)** has been developed to deliver on this commitment. The six-year **NSI 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 NSI Visitor Research Program is to collect data from a range of sources to better understand the NSI 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 project is organised into three reporting rounds between 2018 and 2021. This report summarises the key findings from the first round of data collection.

Methodology

The project methodology draws on **five data sources**, including the NSI Visitor Survey of current visitors; an Online Panel Survey 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.

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 NSI? 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 NSI? 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 NSI? 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:

- Total visitation for 2017 was conservatively estimated to be between **320,000 to 380,000** visitors, based on ferry patronage, occupancy data and responses to the NSI Visitor Survey. Visitor numbers have grown steadily since 2009.
- 46% of current visitors were aged between 36 and 55, with a **median age** of 42.
- The island is a popular **family destination** with almost 46% of visitors being Full Nesters. A majority of these were families with pre-school or primary school-aged children. Weekends and school holidays are the best times for these markets to visit the island.
- Only a small proportion of visitors (3.8%) identified as **Aboriginal or Torres Strait Islanders**.
- The online panel data indicates a more diverse demographic mix of potential 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 (27.0%) and above \$200,000 (13.3%). Most current visitors were **employed full-time**. The current market is time poor, but reasonably affluent.
- The majority of visitors (64.9%) indicated that a **holiday** was the primary reason for visiting the island. The results indicate a very high rate (73.5%) of **repeat visitation**.
- 43% of visitors indicated that they were travelling with **children or extended family**.
- The vast majority of visitors were **free independent travellers (FITs)**. Organised group tour markets such as cruise passengers, education groups and retirees are conspicuously absent in the data.
- Day trippers made up 37.3% of visitors to the island.
- The mean **length of stay** for overnight visitors was 4.7 nights, with a median of three nights. Younger couples, young families (Full Nest I) and older singles preferred shorter overnight stays (1-3 nights), while older families (Full Nest II, Full Nest III) tended to prefer longer overnight stays. Campers, caravan park guests and visitors who own a holiday home on the island tended to stay longer than visitors staying in other types of accommodation.
- In terms of **visitor motives**, the island excels at providing experiences that appeal to escape and relaxation needs. 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 cost, distance and lack of time or interest. The 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 \$100 for day trippers and \$156 for overnight visitors. Accommodation accounted for the highest expenditure category. Families spend considerably more than other visitors on accommodation and food. Spending was highest for visitors staying in hotels or resorts and holiday rentals. Potential day trippers indicated that they would be willing to spend \$195 per day, while potential overnight visitors were willing to spend \$234 per day.

Market Origin

The research confirms previous findings indicating that the majority of visitors (93.2%) were domestic. The proportion of international visitors (6.8%) was slightly higher than reported in previous studies. Key findings include:

- 66.2% of all current visitors came from Queensland.
- A considerable proportion (76.9%) of **domestic visitors** come from within a 50km radius of Dunwich and the top postcodes were concentrated in Brisbane and Redland City.
- Potential visitors were more dispersed, indicating that there may be untapped demand outside the immediate catchment for current visitors. The geographic analysis highlights significant opportunities to attract domestic visitors from slightly further afield. 3.7 million Australians live within 200km of the island.
- The most common **international source markets** were Western Europe (1.7%), USA (1.2%), New Zealand (1.1%), the United Kingdom (0.8%) and Canada (0.8%).

Seasonality

A number of **seasonality indicators** were analysed to understand variations in demand throughout the year. These data sources include ferry patronage, accommodation occupancy, Google Trends data and responses from repeat visitors on the NSI Visitor Survey. Key findings include:

- Overall seasonality pattern is consistent across all seasonality indicators.
- Average **occupancy rates** in 2017 ranged from 25% in May to 61% in December. The average occupancy for campsites (32%) was consistently lower than other types of accommodation (56%).
- The current market is 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 to August and November.
- *Google Trends* data shows that the seasonal patterns identified for NSI are also evident in search activity for other South Queensland island destinations. Trend analysis over four years indicates a steady increase in search activity for Fraser, Bribie and Moreton Islands, while search activity for Stradbroke Island has remained steady.

Destination Awareness

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

Destination Familiarity

- Only 8.6% of potential visitors indicated that they had never heard of North Stradbroke Island, indicating a high level of general awareness. Familiarity with the destination was higher in Queensland and declined for potential visitors from other states.
- There was some confusion in the marketplace between North Stradbroke Island, South Stradbroke Island and Moreton Island.
- Potential visitors are more likely to associate the destination with images of beaches and water.

Destination Sentiment

- Intention to visit NSI in the future was very high for current visitors (95.9%) and high for potential visitors (67.1%).
- 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/picturesque/pretty, relaxing, peaceful/quiet, fun, beaches/sand/sandy and nature.
- NSI is perceived by potential visitors as an adventurous family destination that attracts campers, nature/beach lovers, fishermen, surfers and locals.
- Current visitors were more likely than potential visitors to use terms such as 'walks', 'water', 'swimming' and 'wildlife'/'dolphins'.
- An importance-performance analysis of destination attributes highlights several areas for improvement, including: WiFi access/mobile phone coverage, perceived value for money, variety of places to eat and transport access.
- 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

- NSI was the only destination of the trip for a majority of visitors (85.5%).
- Destinations which share similar features to NSI (i.e. beaches, national parks, wildlife) were most likely to be considered by current visitors when planning their trip to NSI.
- The focus groups revealed that NSI's unique selling proposition was unclear.
- Compared with other Pacific island and beach destinations, NSI is well positioned as a desired holiday destination, behind only the Gold Coast and Sunshine Coast. Potential visitors were more likely to visit North Stradbroke Island in the next five years than other nearby islands (e.g. Bribie Island, Fraser Island and Moreton Island).
- Analysis of TripAdvisor ratings for accommodation, restaurants and activities indicates that NSI receives very positive ratings for activities, outperforming similar off-shore Australian island destinations. NSI is rated less well for restaurants and accommodation.

Advertising Awareness

- 22.2% of current visitors recalled seeing advertising prior to their visit. Most recalls were for local signage, billboards and newspaper advertisements; the 'I ♥ Straddie' stickers; advertising on ferries and buses; and television advertisements and travel shows.
- Most visitors recalled hearing about NSI through friends and family – usually traditional word of mouth or electronic word of mouth through social media (particularly Facebook and Instagram).
- Only 7% of potential visitors recalled seeing any advertising in the last 12 months. This indicates a very low level of advertising awareness. Recall of most information sources was low for potential visitors.

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 NSI. Once on the island, visitors relied on signage, Google/Google Maps, and advice from family and friends.
- The relatively high proportion of visitors using mobile devices during their stay highlights the critical need for WiFi and mobile phone connectivity and the need to ensure that digital content displays well on a range of different devices and platforms.
- Improvements to meet the information needs of visitors can be grouped into a number of key areas, including transport and transit information; beach and weather conditions; availability of facilities, services, activities and events; dining options; camping facilities; local information and maps.
- Online visitor information is highly fragmented, hard to find and often outdated, making trip planning a time-consuming and frustrating process.

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. Despite good public transport connectivity to Cleveland, surprisingly few visitors used public transport.
- Once on the island, the strong reliance on private vehicles continued, although a quarter of visitors reported that they used the island shuttle bus or walked.
- The transport improvements suggested by current visitors included more frequent ferry services; reducing confusion about ferry departure points at Dunwich; subsidising vehicle ferry prices; more flexible bus services; vehicle, moped, Segway and/or bicycle hire in Dunwich; more bicycle paths/trails; better access to key attractions; and more taxis and ride sharing services (e.g. Uber).

Accommodation

- Holiday rentals (28.7%) and camping (27.5%) 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 cabins are likely to attract higher yield markets. Higher yield markets were also 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.
- Current visitors provided a number of suggestions for improving accommodation on the island, including improved camping facilities; better availability and affordability of accommodation; greater variety in accommodation styles; and the need for a range of accommodation to be available for booking online.

Activities and Experiences

- Analysis of visitor settings indicate that all three townships received heavy visitation, although the results do not reveal how much time visitors spent at each location.
- Blue Lake, the NSI historical museum, Myora Springs Conservation Area and Naree Budjong Djara National Park received low visitation.
- Water sports (e.g. swimming, kayaking, surfing)(65.8%), spotting island wildlife (56.4%), and watching whales, dolphins and turtles were major activities for current visitors (51.8%).
- Potential visitors also indicated that the opportunity to watch whales, dolphins and turtles (77.5%), see island wildlife (56.0%) and water sports (53.5%) would attract them to the island. Unlike current visitors, potential visitors also showed strong interest in markets (60.1%), bush walking (56.2%), and snorkelling or diving (37.9%).
- Interest in activities such as visiting museums and galleries, bird watching, and learning about Aboriginal culture generally increases with family lifecycle. Younger couples and older families (Full Nest III) are interested in the widest range of activities.
- Lower yield visitors are more interested in camping, fishing and boating, while higher yield visitors are more interested in learning about Aboriginal culture, museums and galleries, shopping organised tours, massage and spa treatments.
- TripAdvisor reviews for activities on the island were largely positive. The average rating of 4.72/5.00 was higher than for other benchmark island destinations.
- Current visitors provided a number of suggestions for improving activities and experiences on the island, including new Indigenous experiences; European history and sand mining history; walking and cycling trails; land-based activities (e.g. horse riding, 4WD tours, zip lines, bicycle tours, Segway tours, stargazing, dolphin and manta ray feeding, yoga, and massage experiences; sea-based activities (e.g. boat tours, fishing charters, jet ski tours, jet boats, diving and snorkelling tours, and whale watching); and equipment hire (e.g. bicycles, electric bicycles, motorised skateboards, golf buggies, boats, and water sports)

Indigenous Tourism

- There is reasonably strong support for some types of Indigenous tourism experiences, particularly from potential visitors.
- The opportunity to visit an Aboriginal cultural site or to participate in an Aboriginal whale watching tour was rated most likely by both current and potential visitors. There was also some support for an Aboriginal Cultural Centre, which could be used as a focal point for Aboriginal dance, music, performance and art.
- Younger couples, older families (Full Nest III) and older singles are more likely to participate in Indigenous tourism experiences. High-yield potential visitors are most likely to participate in Indigenous experiences.
- The mixed results in this report suggest that learning about Aboriginal culture is not currently a major reason of visiting the island and Aboriginal culture is not strongly identified with NSI. However, there is an appetite for certain types of Indigenous experiences if they are developed in the future.

Festivals and Events

- 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 markets is strongest for families (particularly older families), while interest in a music festival is strongest for earlier lifecycle stages (young singles and couples). Younger couples also show greater interest in arts and crafts, health and well-being. Interest in a seafood festival increases in the later stages of the family lifecycle.
- Higher yield markets are more likely to be attracted by markets, festivals and events that have a focus on seafood 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.

Food and dining

- Many visitors dined at restaurants and cafés (60.9%) or ordered takeaway food (43.6%) on the island. More than 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 older families to dine at restaurants and cafés but had a strong preference for takeaway food.
- 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 of issues. The average rating of 3.78/5.00 was lower than for other benchmark island destinations, but has shown some recent improvement. An analysis of negative reviews revealed disappointment with the freshness and quality of meals, poor service and inconvenient opening and closing times.
- Current visitors provided a number of suggestions for improving food and dining on the island, including: greater variety; more takeaway options and delivery services to accommodation; better grocery stores with competitively priced fresh food; more family-friendly opening hours; and restaurants and cafés that offer better views

Local products

- The ability to purchase 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.
- 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

- The areas that require the most improvement include transport, food and cafés and public amenities such as toilets.
- Trend analysis of TripAdvisor ratings confirms consistently high ratings for activities and improving ratings for restaurants. Ratings for accommodation show little improvement, highlighting the need to strengthen this aspect.
- The Online Panel survey 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: (i) reducing the cost of visiting NSI; (ii) improving accessibility; and (iii) improving visitor information.

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List of Abbreviations

ABS	Australian Bureau of Statistics
CSIRO	Commonwealth Scientific & Industrial Research Organisation
DITID	Department of Innovation, Tourism Industry Development and the Commonwealth Games
DSD	Department of State Development
DSDMIP	Department of State Development, Manufacturing, Infrastructure & Planning
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

North Stradbroke Island (NSI), or Minjerribah as the island is called by the Quandamooka people, is the world's second-largest sand island. Located less than an hour from Brisbane, the island boasts a stunning natural environment, a 20,000 year old Indigenous heritage, and more than 2,000 permanent residents. Also known as 'Straddie', NSI is a popular destination for families, who are particularly attracted primarily by the island's beaches and wildlife (EarthCheck, 2015). NSI 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 North Stradbroke Island (NSI) and expanding the island's existing industries to ensure a strong, sustainable economy for the future. The Queensland Government has developed the NSI **Economic Transition Strategy (ETS)** to deliver on this commitment (Department of State Development, 2016). The ETS includes initiatives that aim to:

- diversify and expand the current tourism industry;
- expand education and training opportunities; and
- stimulate local business development and growth.

The ETS identifies a range of future tourism opportunities for North Stradbroke Island, 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 **NSI 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 NSI Visitor Research Program is to collect data from a range of sources to better understand the NSI 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 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 North Stradbroke Island will enable development of an integrated and effective marketing program for the Island and also enable individual tourism providers to effectively tailor their specific products to meet the market. The research presented in this report also informs future infrastructure/services planning to ensure that NSI 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 reporting rounds between 2018 and 2021. This report summarises the key findings from the first round of data collection.

Table 1. Key data sources

Data Source	Description	Insights
NSI Visitor Survey <i>Who:</i> Current visitors (n=649) <i>When:</i> Round 1: Aug 2017-Jan 2018 Round 2: Jun 2018-May 2019 Round 3: Jun 2020-May 2021	Visitor surveys conducted bi-annually at different times throughout the year to capture seasonal variations.	<ul style="list-style-type: none"> ▪ Awareness of NSI ▪ Information sources/advertising ▪ Satisfaction and repeat visitation ▪ Visitor motives, behaviour, preferences ▪ Expenditure and length of stay ▪ Demand for Indigenous experiences
Online Panel <i>Who:</i> Potential visitors (n=478) <i>When:</i> Round 1: Jan 2018-Feb 2018 Round 2: Dec 2018-Jan 2019 Round 3: Dec 2020-Jan 2021	Online surveys collected throughout the project to capture domestic non-visitors. Internet market research panels are a cost-effective approach for recruiting participants.	<ul style="list-style-type: none"> ▪ Awareness of NSI ▪ Information sources/advertising ▪ Travel intentions ▪ Visitor motives, behaviour, preferences ▪ Visitor constraints and facilitators ▪ Benchmarking with other islands ▪ Demand for Indigenous experiences
Focus Groups <i>Who:</i> Visitors & non-visitors <i>When:</i> Round 1: Jan 2018-Feb 2018 Round 2: Nov 2018-Jan 2019 Round 3: Nov 2020-Jan 2021	Focus groups provide a more nuanced understanding of insights identified through the surveys.	<ul style="list-style-type: none"> ▪ Awareness of NSI ▪ Information sources/advertising ▪ Visitor motives, behaviour, preferences ▪ Visitor constraints and facilitators
TripAdvisor Reviews <i>Who:</i> Past visitors <i>When:</i> Round 1: Feb 2018 Round 2: Jan 2019 Round 3: Jan 2021	Analysis of TripAdvisor Reviews to gain insights into post-consumption evaluations of NSI and to benchmark NSI against competing experiences.	<ul style="list-style-type: none"> ▪ 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 <i>Who:</i> Visitors <i>When:</i> Round 1: Aug 2017-Feb 2018 Round 2: Jun 2018-May 2019 Round 3: Jun 2020-May 2021	Desktop audit of existing data sources, including passenger numbers for major modes of transport, accommodation occupancy, and Australian Bureau of Statistics data.	<ul style="list-style-type: none"> ▪ 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 and allows the team to test and refine the methodology for subsequent rounds.

The survey was primarily administered 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. Research Assistants were employed and trained to assist with data collection. To encourage participation, respondents could elect to be entered into a prize draw consisting of a meal voucher and a weekend's accommodation 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. The high rate of invalid surveys is partly due to the length of the survey, which made it difficult for some respondents to complete in the time available.

2.2.2 Online Panel

Potential visitors were surveyed by recruiting participants through an Online 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). Surveys were conducted online in January and February 2018. 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. 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. This broad sample provides important data about potential visitors and their awareness of NSI and major competitors, preferences, and constraints and facilitators to visiting.

2.2.3 Focus Groups

Two focus group interviews were conducted with visitors and non-visitors in February 2018 to further explore perceptions of NSI and to identify perceived constraints to visiting NSI. Each focus group consisted of six participants. The visitor focus group included participants who had visited NSI 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 NSI, Bribie Island, Fraser Island, Kangaroo Island, Magnetic Island and Moreton

Island. Table 2 provides a summary of the TripAdvisor data, including the number of operators and the total number of reviews for each destination.

Table 2. TripAdvisor benchmark destination data

Destination	Accommodation		Restaurants		Activities	
	Operators	Reviews	Operators	Reviews	Operators	Reviews
Bribie Island	14	671	49	2,977	13	322
Fraser Island	16	7,141	6	786	15	3,979
Kangaroo Island	73	6,950	32	5,494	47	8,725
Magnetic Island	28	4,575	26	3,870	7	953
Moreton Island	5	2,928	7	737	10	1,129
North Stradbroke Island	16	1,144	20	1,544	15	1,027

Source: TripAdvisor

The ratings were analysed to benchmark visitor satisfaction with NSI against other off-shore islands. Reviews were also analysed to extract the key themes influencing visitor ratings of NSI 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. An initial scan of available information and reports was conducted prior to the first round of survey work to identify baseline data and gaps in knowledge. Secondary data presented in this report was collected from the sources shown in Table 3.

Table 3. Secondary Data Sources

Source	Year	Type	Provider
Accommodation occupancy	2018	Data	Straddie Chamber of Commerce
Camping occupancy	2018	Data	Minjerribah Camping
Census data	2018	Data	Australian Bureau of Statistics
Water taxi patronage	2018	Data	Department of Transport & Main Roads
Google trends	2018	Data	Google
Visitor reviews	2018	Text	TripAdvisor
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 NSI? 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 NSI? 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?

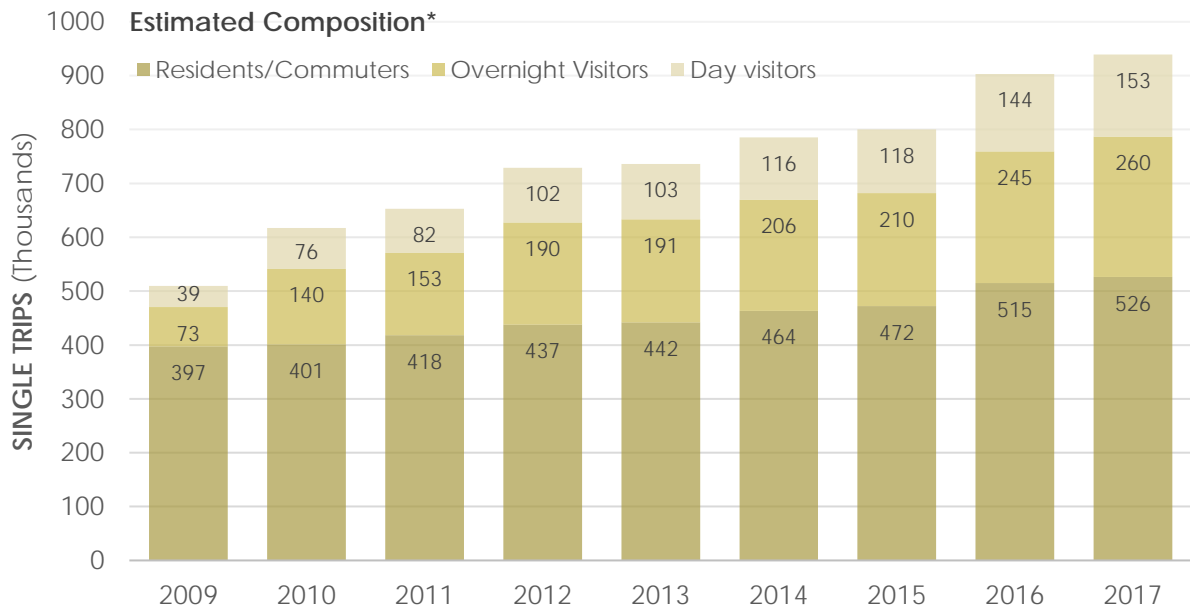
3.2 Market Profile

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 North Stradbroke Island but data is 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).

Modelling of the available data indicates that total visitation for 2017 was between **320,000 to 380,000** visitors and that this number has increased since 2009. This is a conservative estimate based on ferry 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.

Ferry passenger numbers provide the most reliable data source for estimating visitor numbers to NSI. Figure 1 shows the total number of passenger trips on water taxi services between the mainland and NSI over the last nine years. Since 2009 water taxi patronage has risen steadily to reach almost 1 million trips in 2017.



Source: TMR/Translink (2018)

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

Figure 1. NSI water taxi patronage and estimated composition

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. Water taxi patronage includes both residents and visitors. Based on screening questions to identify visitors during the survey work, we estimate that 40-50% of trips in 2017 were undertaken by visitors. NSI visitor survey data indicates that day trippers make up 37% of visitors to the island. Using actual water taxi patronage data as a starting point, it is possible to estimate the number of single trips undertaken by residents, day visitors and overnight visitors. Given that ABS data indicates that the number of residents on the island has not changed considerably between the 2011 and 2016 census, it is assumed that the number of trips undertaken by residents/commuters has not changed considerably. Based on available data, an estimated 195,000-215,000 visitors took a return trip by water taxi in 2017.

The vehicle ferry operated by Stradbroke Ferries (Sealink) is the other major source of visitors to the island. It was not possible to obtain passenger numbers for this service and it is therefore challenging to accurately measure the total number of visitors to the island. However, based on observations during survey work, it is estimated that 125,000-165,000 visitors accessed the island via the vehicle ferry in 2017.

3.2.2 Visitor Profile

The age profile indicates that 46% of current visitors were aged between 36 and 55, with a **median age** of 42 (see Table 4). The proportion of current visitors aged between 36 and 55 years (46.0%) 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 = 38) tend to be younger than overnight visitors (median age = 43).

One of the key goals in the ETS is to “create an accessible playground for Queensland families.” The demographic profile is consistent with this and shows a strong predisposition toward **families**¹. Almost 46% of visitors were ‘Full Nesters’, with a majority including families with pre-school or primary school-aged children. Only a small proportion of visitors (3.8%) identified as Aboriginal or Torres Strait Islanders, although the percentage was consistent with the Queensland population (4.0%) and higher than the Australian population (2.8%).

Table 4. Age, family lifecycle and ethnicity

	Current Visitors			Potential Visitors		
	Day Trippers	Overnight Stays	Total	Day* Trippers	Overnight Stays	Total
Age	n=214	n=374	n=588	n=36	n=373	n=409
18 to 25	21.5%	13.1%	16.2%	11.1%	11.8%	11.7%
26 to 35	24.3%	19.0%	20.9%	11.1%	23.3%	22.2%
36 to 45	17.3%	25.4%	22.4%	5.6%	21.4%	20.0%
46 to 55	21.5%	24.9%	23.6%	5.6%	15.3%	14.4%
56 to 65	9.8%	12.3%	11.4%	22.2%	12.9%	13.7%
Over 65	5.6%	5.3%	5.4%	44.4%	15.2%	17.9%
Family Lifecycle	n=206	n=358	n=564	n=35	n=360	n=395
Younger Singles	28.2%	20.4%	23.2%	11.4%	13.3%	13.2%
Younger Couples	14.1%	12.0%	12.8%	2.9%	8.9%	8.4%
Full Nester I (Pre-school)	9.2%	9.5%	9.4%	5.7%	21.1%	19.7%
Full Nester II (Primary)	18.9%	26.5%	23.8%	8.6%	14.2%	13.7%
Full Nester III (Secondary)	11.2%	13.4%	12.6%	2.9%	9.4%	8.9%
Empty Nesters	13.1%	12.8%	12.9%	51.4%	21.9%	24.6%
Older Singles	5.3%	5.3%	5.3%	17.1%	11.1%	11.6%
Indigenous Heritage	n=237	n=398	n=635	n=36	n=370	n=406
ATSI	5.9%	2.5%	3.8%	0.0%	1.9%	1.7%
Quandamooka peoples	1.3%	0.3%	0.6%	0.0%	1.1%	1.0%

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

Source: NSI visitor survey, Online Panel

Ethics requirements prevented us from surveying visitors aged under 18. However, while surveying on the ferries we observed many day-trippers under 18 travelling in friendship groups. Typically, these visitors were aged between 12 and 17. Casual conversations with several groups revealed that they are dropped off at Toondah Harbour by parents and were most likely to participate in marine-based activities (e.g. surfing, swimming, relaxing on the beach) while on the island. Spending by these visitors is likely to be less than other types of visitors.

The online panel data indicates a more diverse demographic mix of potential visitors could be attracted to the island. The proportion of potential visitors (91%) indicating that they intended to stay overnight was higher. Similarly, most participants on the non-visitor focus group indicated that NSI was unlikely to be a day visit destination. This view was particularly evident amongst those who rely on public transport (too difficult and time consuming for only one day).

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).

Table 5 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 (27.0%) and above \$200,000 (13.3%). This distribution is indicative of single income vs dual income households. Most respondents indicated that they were **employed full-time**.

Table 5. Socio-demographic profile

	Current Visitors			Potential Visitors		
	Day Trippers	Overnight Stays	Total	Day Trippers*	Overnight Stays	Total
Annual Household Income	n=222	n=379	n=601	n=36	n=373	n=409
Less than \$50,000	13.5%	5.8%	8.7%	52.8%	26.5%	28.9%
\$50,001 to \$80,000	13.5%	11.1%	12.0%	19.4%	24.7%	24.2%
\$80,001 to \$110,000	14.0%	15.6%	15.0%	5.6%	14.5%	13.7%
\$110,001 to \$140,000	8.6%	11.1%	10.1%	2.8%	11.0%	10.3%
\$140,001 to \$170,000	9.0%	8.4%	8.7%	2.8%	5.4%	5.1%
\$170,001 to \$200,000	4.5%	7.7%	6.5%	2.8%	3.5%	3.4%
Above \$200,000	10.4%	15.0%	13.3%	-	1.6%	1.5%
Prefer not to say	26.6%	25.3%	25.8%	13.9%	12.9%	13.0%
Employment Status	n=227	n=389	n=616	n=36	n=373	n=409
Unemployed	1.3%	0.5%	0.8%	2.8%	4.0%	3.9%
Studying	6.2%	3.6%	4.5%	2.8%	4.0%	3.9%
Working part-time	8.8%	8.0%	8.3%	22.2%	16.6%	17.1%
Working full-time	72.2%	74.8%	73.9%	19.4%	50.7%	47.9%
Retired	7.0%	5.7%	6.2%	50.0%	19.0%	21.8%
Prefer not to say	3.5%	4.4%	4.1%	-	1.9%	1.7%
Other	0.9%	3.1%	2.3%	2.8%	3.8%	3.7%

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

Source: NSI visitor survey, Online Panel

The employment status and income data indicate a market that may be time poor, but reasonably affluent. The family life-cycle composition suggests that many current visitors are likely to be constrained by 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.

3.2.3 Trip Characteristics

The island is predominantly a leisure destination. The majority of visitors (64.9%) indicated that a **holiday** was the primary reason for visiting the island. Other reasons included visiting friends and relatives (VFR) (10.6%), attending an event (6.2%), business (2.8%) and education and research (0.6%).

Travel party composition highlights the importance of families, with 43.0% of visitors indicating that they were travelling with children or extended family (see Table 6). Most of the remaining visitors were traveling with friends or partners. 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. The small proportion of visitors who were part of an organised tour suggest that there are considerable future opportunities to diversify the market to address seasonality issues. Organised group tour markets such as cruise passengers, education groups and retirees are conspicuously absent in the data.

Table 6. Travel party composition

	Frequency	Percent
Visiting alone	46	7.1%
Visiting with partner	125	19.3%
Visiting with partner and children	170	26.2%
Visiting with extended family	109	16.8%
Visiting with a group of friends	126	19.4%
Visiting with business associates	7	1.1%
Organised tour or group	4	0.6%
School/university group	1	0.2%
Other	31	4.8%

Source: NSI visitor survey

The results also indicate a very high rate (73.5%) of **repeat visitation** (see Table 7). The drivers of this repeat visitation are likely to be the 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. It appears that a visit to the island has become an annual family tradition for many visitors, with 67.8% of visitors indicating that they visited at least once a year. The rate of repeat visitation for potential visitors was also relatively high.

Table 7. Repeat visitation

	Current Visitors		Potential Visitors	
	N	Percent	N	Percent
Previous Visits				
None	143	22.0%	191	46.7%
Once before	79	12.2%	118	28.9%
2 to 5 times	102	15.7%	64	15.6%
More than 5 times	296	45.6%	36	8.8%
First visit				
Before 1980	38	5.9%	n/a	-
1980s	53	8.2%	n/a	-
1990s	83	12.8%	99	47.1%
2000s	88	13.6%	58	27.6%
2010s	231	35.6%	54	25.7%
Trip Frequency				
Every few years	110	21.7%	n/a	-
Once a year	115	22.7%	n/a	-
Twice a year	70	13.8%	n/a	-
More than twice a year	158	31.2%	n/a	-

Source: NSI visitor survey, Online Panel

Day trippers made up 37.3% of visitors to the island (Table 8). The mean **length of stay** for overnight visitors was 4.7 nights, with a median of 3 nights. These averages are consistent with other SEQ destinations. The mean intended length of stay for Potential Visitors was 4.4, with a median of 4 nights. Table 8 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. As noted earlier, potential visitors were far more likely to indicate that they would stay overnight.

Table 8. Length of stay

	Current Visitors		Potential Visitors	
	N	Percent	N	Percent
Day trippers	242	37.3%	36	8.8%
1 night	49	7.6%	11	2.7%
2 nights	100	15.4%	54	13.2%
3 nights	57	8.8%	95	23.2%
4 nights	39	6.0%	43	10.5%
5-7 nights	93	14.3%	137	33.5%
More than 7 nights	69	10.6%	33	8.1%

Source: NSI visitor survey, Online Panel

Table 9 provides a breakdown of length of stay by family lifecycle. The results indicate that that 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 9. Length of Stay by Family Lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Day trippers	44.3%	40.3%	35.8%	29.1%	32.4%	37.0%	36.7%
1 night	13.7%	12.5%	3.8%	0.7%	9.9%	8.2%	10.0%
2 nights	16.8%	25.0%	20.8%	9.0%	8.5%	15.1%	20.0%
3 nights	9.2%	8.3%	11.3%	10.4%	2.8%	8.2%	6.7%
4 nights	6.1%	1.4%	0.0%	10.4%	7.0%	6.8%	3.3%
5-7 nights	6.1%	6.9%	17.0%	26.9%	22.5%	11.0%	13.3%
More than 7 nights	3.8%	5.6%	11.3%	13.4%	16.9%	13.7%	10.0%
Mean Nights*	3.52	3.26	5.03	5.89	5.81	5.46	4.42

*Note: Excludes day trippers.

Source: NSI Visitor Survey

Further insight can be gained by breaking down length of stay by accommodation type (Table 10). The findings indicate that campers, caravan park guests and visitors who own a holiday home on the island tend to stay longer. Hotel and resort guests have the shortest length of stay. The length of stay data for holiday rentals suggest that guests are more likely to rent a holiday home over a weekend (2 nights) or for a week (5-7 nights).

Table 10. Length of stay by accommodation type

	Camping	Caravan Park	Own Property	Hotel or Resort	Holiday Rental	VFR
1 night	7.4%	7.1%	4.1%	25.9%	13.0%	16.3%
2 nights	22.2%	10.7%	24.5%	14.8%	27.0%	34.7%
3 nights	12.0%	17.9%	10.2%	22.2%	11.3%	14.3%
4 nights	13.0%	14.3%	10.2%	18.5%	3.5%	12.2%
5-7 nights	24.1%	25.0%	20.4%	7.4%	34.8%	10.2%
More than 7 nights	21.3%	25.0%	30.6%	11.1%	10.4%	12.2%
Mean Nights	5.52	6.07	6.27	3.56	4.77	4.16

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 NSI (1=Not at all important ... 5=Very important). Potential visitors were asked to rate how important various reasons were to them when choosing a holiday. Both current and potential visitors 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 specific **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 performance/importance analysis for current and potential visitors are presented in Figure 2 and Figure 3.

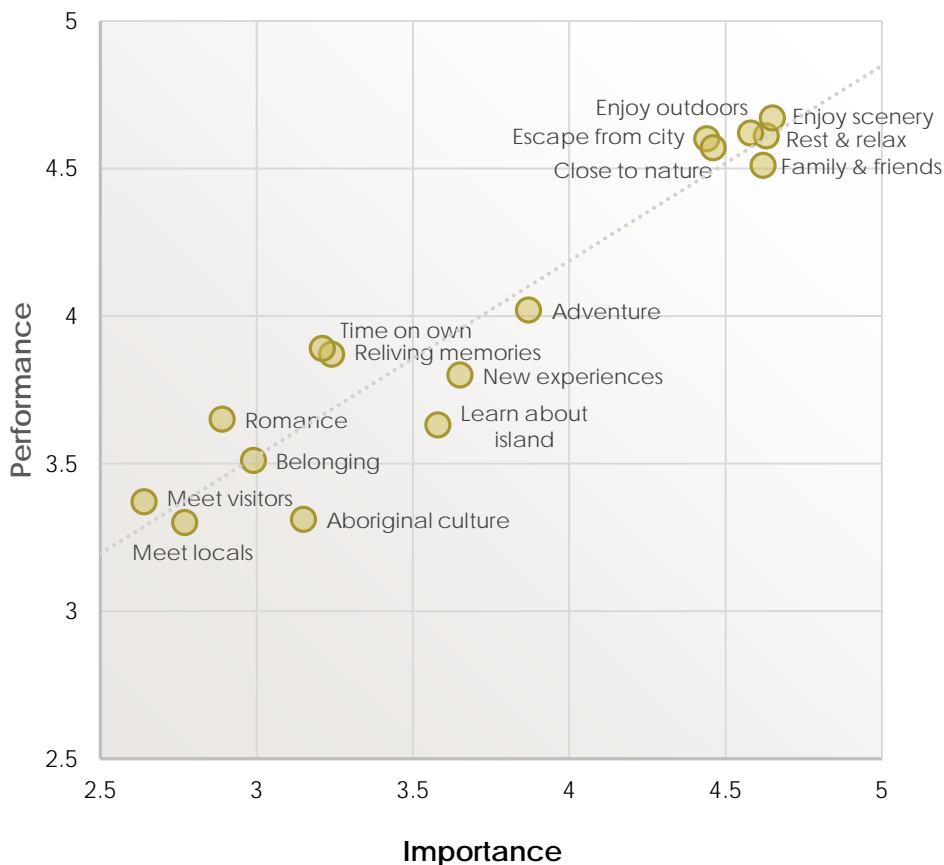


Figure 2. Importance Performance analysis of current visitor motives

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. This approach highlights that learning about aboriginal culture, learning about the island, and experiencing new things are moderately important 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 rest and rejuvenate from the stresses of city life. The importance of family again emerges as a consistent theme.

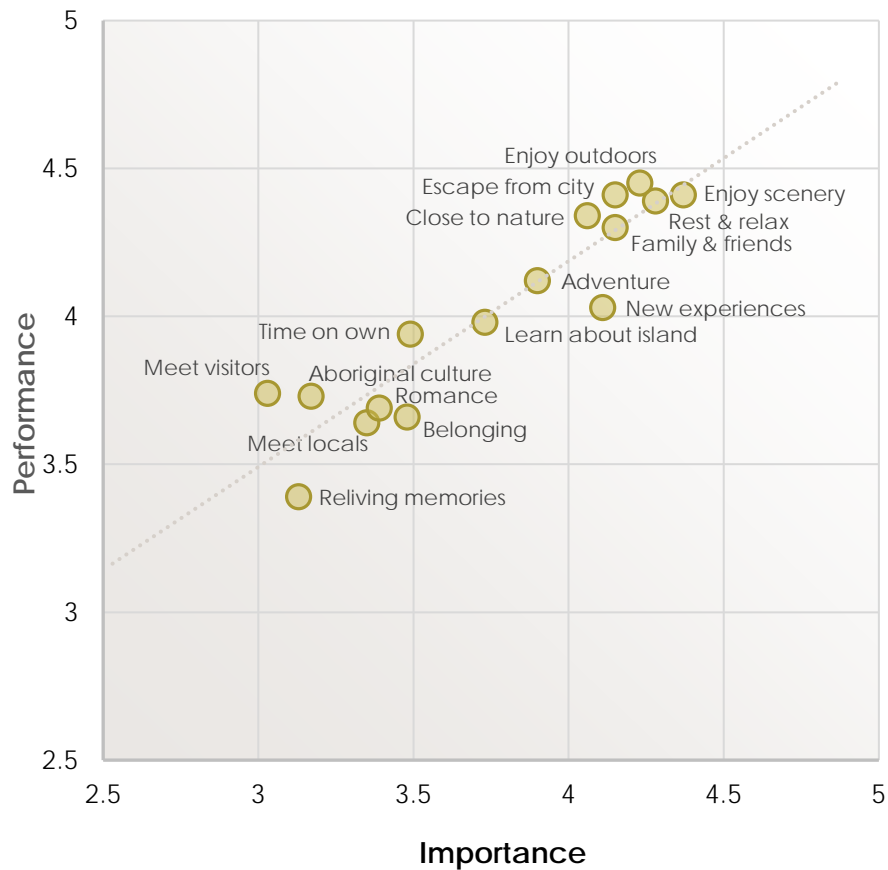


Figure 3. Importance Performance analysis of potential visitor motives

The overall pattern of the importance-performance analysis for potential visitors is largely consistent with current visitors, indicating that the potential market holds very similar motives and perceptions of performance. 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 NSI 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 11) are consistent with those reported in market research for other destinations (i.e. cost, time, distance, interest). While some of the barriers to visitation are related to personal reasons, others can be addressed through marketing and provision of visitor information. For example, perceptions about access can be addressed by emphasising that the island is ‘on your doorstep’ or ‘in your backyard’. Lack of knowledge can be addressed through more targeted visitor information (see Information Sources). Clearly some potential visitors have the impression that a 4WD vehicle is needed to access the island. This theme also emerged from the non-visitor focus group, where it was clear that participants were confusing North Stradbroke Island with Moreton Island. Marketing and visitor information needs to emphasise the accessibility of the island using public transport, bicycles and 2WD vehicles.

Table 11. Main reasons for not visiting

Reason	Percentage	Sample Quotes
Too expensive	13.0%	I have heard it costs an arm and a leg to take camper trailer over There are cheaper options visiting destinations outside Australia Too expensive for the barge Have not considered it as the ferry fees are too high Costly to get there - we would prefer to stay on the mainland
Not interested	13.0%	Not much to do there Does not seem to be a lot to interest me there It's not really a destination of great interest to me
Lack of knowledge	12.0%	Not sure what it actually offers to visit. Not sure what is there to do and see Not sure about what there is to do for children Just never thought about it and assumed u need a 4-wheel drive
Prefer other destinations	8.0%	I usually prefer to go further afield Not on the bucket list There are other places I would prefer to go first. I normally travel overseas
Accessibility	5.0%	We don't have a 4wd drive Too difficult and costly to get there and get around Don't have a 4 x 4 It's just not easy to access with young kids at the moment. We have easier and more economical options.

3.2.6 Visitor Spending

Current visitors were asked to estimate how much they spent on various aspects of their trip, while potential visitors were asked how much they would be willing to spend. Not surprisingly, the results indicate that accommodation accounts for the highest expenditure (Table 12). 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. The results also highlight that potential visitors expect the cost of transport to the island to be lower than the median paid by current visitors. However, potential visitors were willing to pay more than current visitors for accommodation, activities and transport around the island.

Table 12. Median visitor spend per stay

	Current Visitors		Potential Visitors	
	N	Median	N	Median
Getting to the island	554	\$150.00	329	\$100.00
Getting around the island	374	\$30.00	319	\$60.00
Food and drinks	476	\$100.00	333	\$200.00
Shopping	215	\$100.00	304	\$100.00
Accommodation	248	\$400.00	301	\$500.00
Activities	88	\$30.00	302	\$100.00

Source: NSI visitor survey, Online Panel

Further insight 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 (Potential Visitors) (Table 13). 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 visitors are likely to spend more per day than overnight visitors in all spending categories aside from food and drinks.

Table 13. Median visitor spend per day

	Current Visitors		Potential Visitors	
	Day trippers	Overnight Stays	Day trippers	Overnight Stays
Getting to the island	\$40.00	\$33.33	\$40.00	\$16.67
Getting around the island	\$16.50	\$7.50	\$30.00	\$16.67
Food and drinks	\$40.00	\$40.00	\$50.00	\$50.00
Shopping	\$30.00	\$16.67	\$50.00	\$25.00
Accommodation	-	\$90.00	-	\$100.00
Activities	\$17.50	\$6.67	\$30.00	\$20.00
Total Spend	\$100.25	\$156.25	\$195.00	\$233.67

Source: NSI visitor survey, Online Panel

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 14 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 14. Median visitor spend per day by Family Lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Getting to the island	\$20.00	\$40.00	\$40.00	\$40.00	\$30.00	\$38.13	\$20.00
Getting around the island	\$10.00	\$12.50	\$11.25	\$10.00	\$7.75	\$9.70	\$9.70
Food and drinks	\$25.00	\$35.71	\$50.00	\$50.00	\$40.00	\$50.00	\$26.50
Shopping	\$10.00	\$10.00	\$16.67	\$25.00	\$20.00	\$18.33	\$20.00
Accommodation	\$31.25	\$33.33	\$83.33	\$140.00	\$122.50	\$94.49	\$72.92
Activities	\$11.25	\$15.00	\$13.13	\$13.64	-	-	\$14.29
Total Spend	\$71.25	\$110.63	\$171.83	\$190.00	\$163.00	\$125.00	\$69.20

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 15).

Table 15. Median visitor spend per day by accommodation type

	Camping	Caravan Park	Own Property	Hotel or Resort	Holiday Rental	VFR
Getting to the island	\$40.00	\$50.00	\$20.83	\$36.25	\$29.33	\$20.00
Getting around the island	\$10.00	\$10.00	\$5.26	\$10.00	\$7.50	\$7.50
Food and drinks	\$40.00	\$45.45	\$33.33	\$66.67	\$50.00	\$32.00
Shopping	\$14.29	\$10.56	\$33.33	\$25.00	\$18.75	\$13.25
Accommodation	\$43.81	\$79.17	-	\$130.00	\$167.71	-
Activities	\$9.17	\$0.33	\$3.00	\$4.50	\$5.00	\$10.48
Total Spending	\$161.25	\$204.73	\$75.42	\$271.67	\$263.33	\$66.36

Source: NSI Visitor Survey

3.3 Market Origin

The research confirms previous findings indicating that the vast majority of visitors (66.0%) originate from Queensland (Table 16). The proportion of international visitors (6.8%) was slightly higher than reported in previous studies and compares favourably with the proportion of international visitors to Brisbane (5.5%), the Sunshine Coast (2.9%), Gold Coast (7.1%), and Fraser Coast (8.6%) (Tourism Research Australia, 2018). However, comparisons with the Fraser Coast – which offers a similar tourism product further removed from international gateways – highlights the opportunity to further grow the share of international visitors.

Table 16. Domestic and international source markets

	Frequency	Percent
Domestic	590	93.2
Queensland	418	66.0%
New South Wales	38	6.0%
Victoria	7	1.1%
Western Australia	2	0.3%
Tasmania	2	0.3%
Northern Territory	1	0.2%
Not specified	122	19.3%
International	43	6.8%

Source: NSI Visitor Survey

The most common international source markets were Western Europe (1.7%), USA (1.2%), New Zealand (1.1%), the United Kingdom (0.8%) and Canada (0.8%). The NSI visitor survey was available in English only but we did observe a small number of visitors from China, Latin America and Eastern Europe. The CSIRO (2013) identified the 'Orient Express' of Asian visitors as a major opportunity for Queensland Tourism. At this stage, it is unclear whether NSI offers the kinds of experiences Asian visitors might be seeking, but research from Tourism Research Australia (2018) suggests that this market is interested in beaches and natural attractions. In addition to New Zealand and the United Kingdom, the Redland City Council (2014) has identified China as one of the top three source markets of international visitors to the region.

Further analysis of the TripAdvisor reviews for accommodation between 2008 and 2018 indicated that 85.5% of reviewers were from Australia, including 66.0% from Queensland, 11.1% from New South Wales and 4.2% from Victoria. International reviewers were most likely to come from the United Kingdom (6.2%), Western Europe (2.7%), New Zealand (1.8%), Asia (1.5%), the USA (0.9%) and Canada (0.6%). These percentages differ from the NSI Visitor Survey because they only capture overnight visitors. However, they confirm that the overall pattern of key source markets is consistent across multiple data sources.

Although an analysis of origin by state and country is useful, state borders are relatively arbitrary. An analysis of **postcodes** provides a more detailed understanding of visitor origin. The heat map in Figure 4 reveals that domestic source markets are very localised and concentrated mainly around Southeast Queensland.

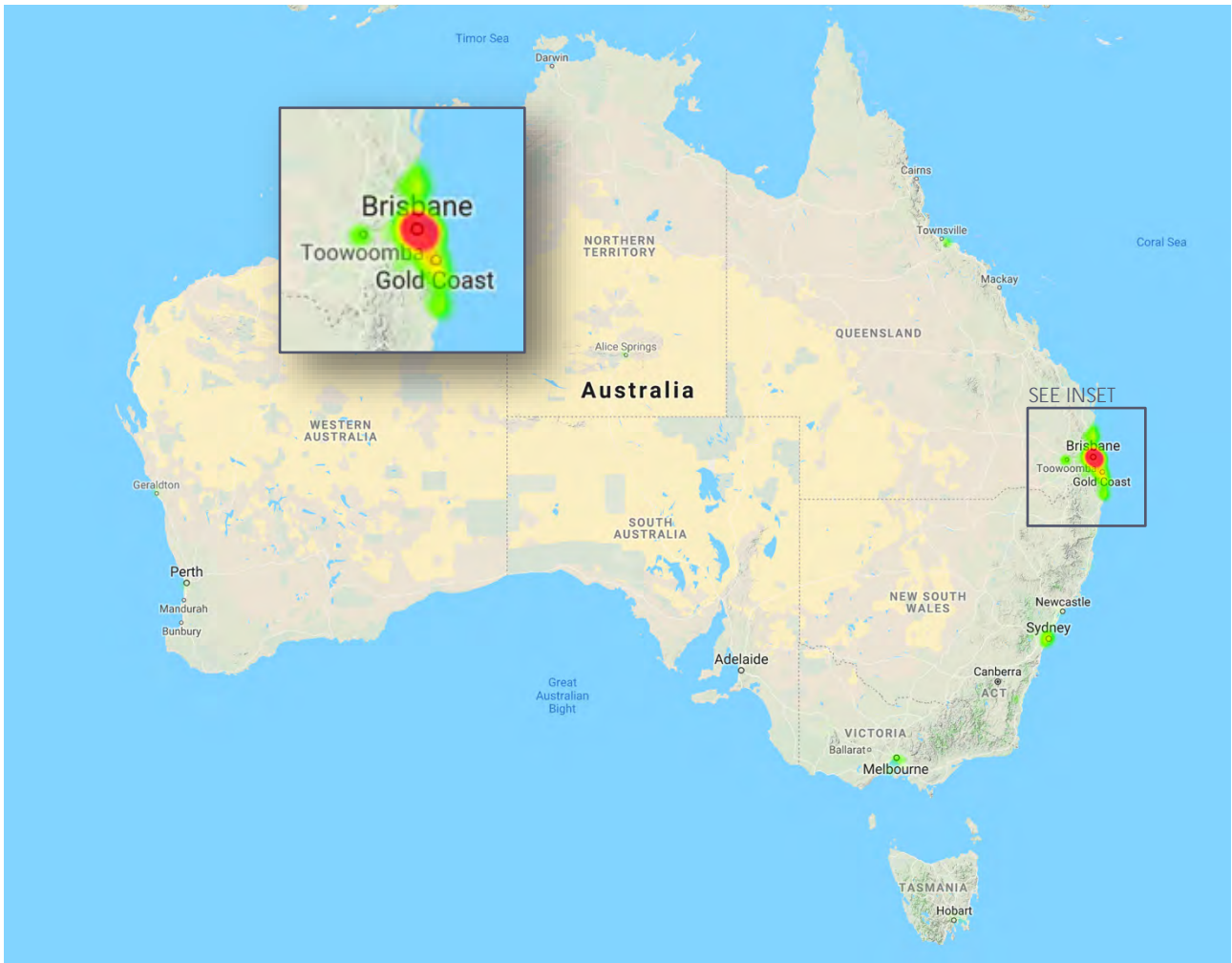


Figure 4. National postcode heat map

The analysis of domestic visitors presented in Table 17 provides further insights. The results highlight that a considerable proportion (76.9%) of current domestic visitors come from within a **50km radius** of Dunwich. Potential visitors were more dispersed, indicating that there may be untapped demand outside the immediate catchment for current visitors.

Table 17. Domestic visitor origin by proximity

	Current Visitors		Potential Visitors	
	N	Percent	N	Percent
50km Radius	360	76.9%	192	46.9%
100km Radius	43	9.2%	92	22.5%
200km Radius	20	4.3%	44	10.8%
Rest of Queensland	11	2.4%	7	1.7%
Rest of New South Wales	22	4.7%	20	4.9%
Victoria	7	1.5%	29	7.1%
South Australia	0	0.0%	7	1.7%
Western Australia	2	0.4%	8	2.0%
Tasmania	2	0.4%	3	0.7%
Australian Capital Territory	0	0.0%	4	1.0%
Northern Territory	1	0.2%	1	0.2%

Source: NSI visitor survey, Online Panel

The analysis also reveals that the top postcodes are concentrated in Brisbane and Redland City (Table 18 and Figure 5). There are six clear **postcode clusters** that together represent a third of all visitors.

Table 18. Top postcode clusters

Suburbs	Postcode	Frequency	Percent
Redlands	4157/60/61/63/64/65	65	10.0%
Brisbane Central/Inner Suburbs	4000/05/06/59/64/66, 4101	51	7.9%
Inner East Brisbane	4151, 4152, 4170	36	5.6%
Bardon, Toowong, Indooroopilly, Kenmore	4065, 4066, 4068, 4069	25	3.8%
North-western Brisbane	4031, 4051, 4053, 4055	23	3.6%
Manly, Wynnum, Wakerley	4154, 4178, 4179	20	3.1%
Total		220	34.0%

Source: NSI visitor survey

Geographically, the island is most accessible from the Redlands bayside suburbs and it was therefore not surprising to see 10% of visitors originating from these suburbs. Local advertising (newspaper advertisements, billboards and signage) is also more prominent in these suburbs (see Advertising Awareness). The next four clusters represent higher income suburbs in inner Brisbane and East Brisbane and outer suburbs in Western and North-Western Brisbane. A cluster map of the most common postcodes highlights a higher proportion of visitors (yellow clusters) in suburbs arranged in an arc from Redland Bay, through to Inner Brisbane and out to the Western Suburbs.

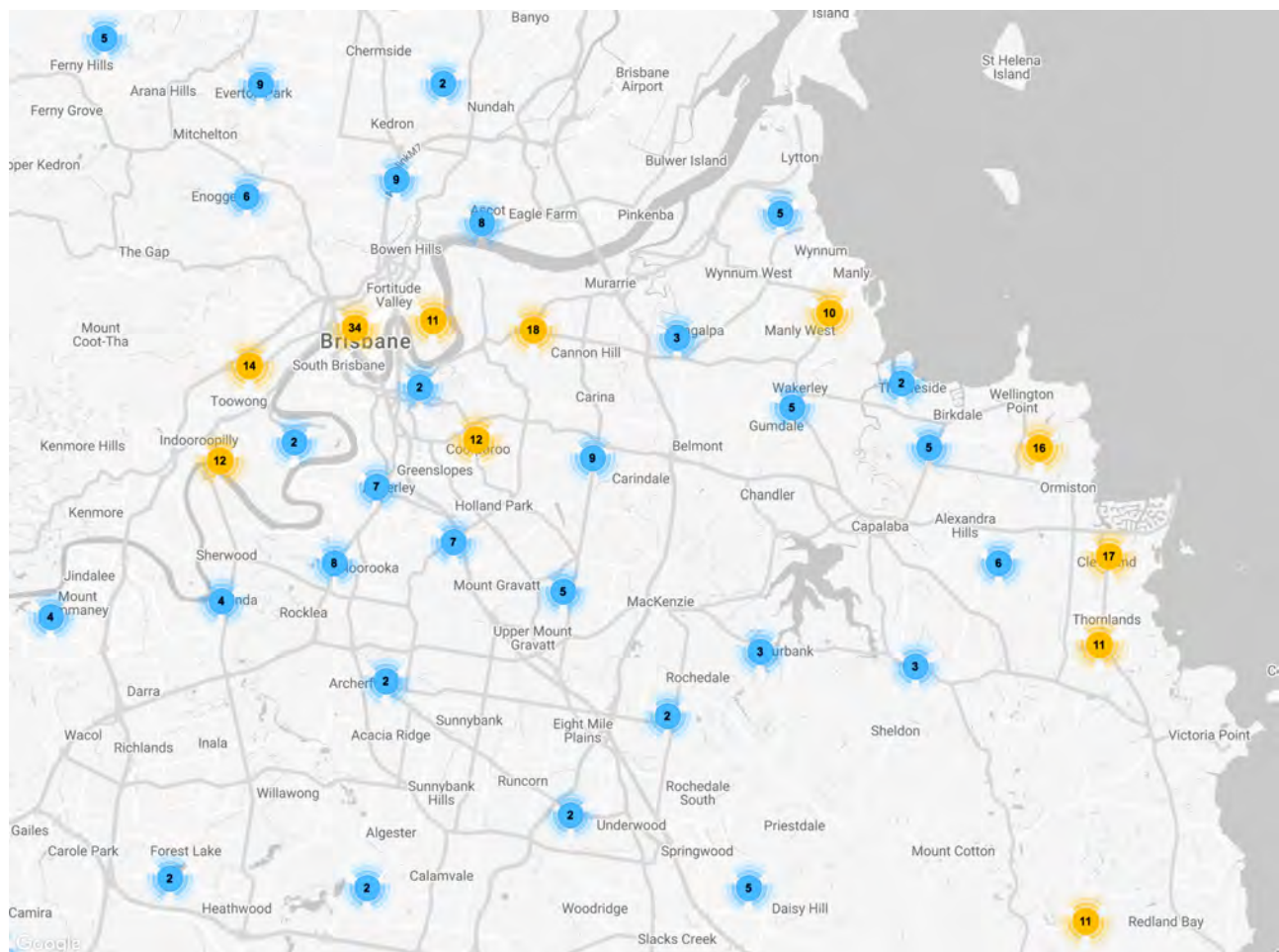


Figure 5. Southeast Queensland postcode cluster map

The geographic analysis highlights significant opportunities to attract domestic visitors from slightly 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 19).

Table 19. Population catchment within 200km of North Stradbroke Island

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

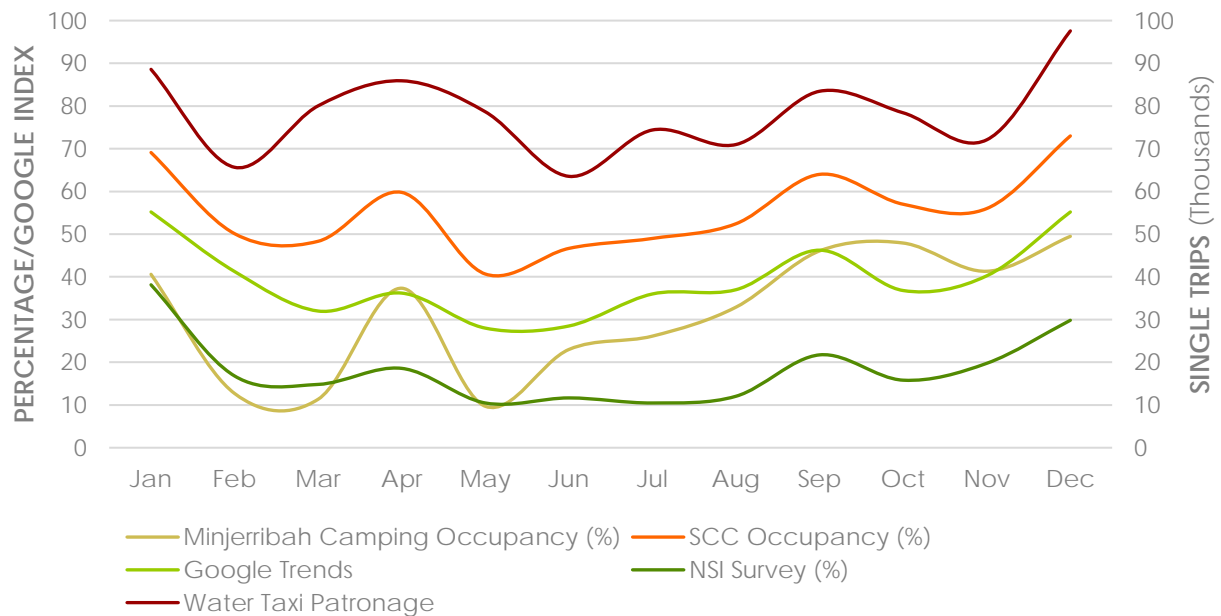
Source: Australian Bureau of Statistics (2018)

The area is likely to be the core population catchment for future visitors to NSI. 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 attract high-yield markets and tap into the latent demand in this area.

3.4 Seasonality

A number of **seasonality indicators** were collected to understand variations in demand throughout the year. These data sources include ferry patronage, accommodation occupancy, Google Trends data and responses from repeat visitors on the NSI Visitor Survey (Figure 6).

NSI 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). Data provided by the Straddie Chamber of Commerce and Minjerribah Camping indicates that 2017 average **occupancy rates** ranged from 25% in May to 61% in December. The average occupancy for campsites (32%) was consistently lower than other types of accommodation (56%).



Sources: TMR/Translink, Google Trends, Minjerribah Camping, Straddie Chamber of Commerce, NSI Visitor Survey (2018)

Figure 6. Seasonality indicators (2017)

Overall, occupancy rates for accommodation providers follow a similar seasonal pattern to ferry patronage, especially for holiday seasons such as Easter and Christmas (Figure 4). Occupancy rates for August 2016 to January 2018 have been collected through two different surveys conducted by the Straddie Chamber of Commerce with the island’s accommodation providers. Not all accommodation providers have responded to the survey. The sample size was nine for the period of August 2016 to August 2017 and only five for the period of September 2017 to January 2018. Occupancy data for Minjerribah Camping is also limited but provides additional insight into the seasonal pattern of overnight visitation to the island. Similar problems in sample size, data quality and responsiveness have been reported by other market studies for the region (Footprints Market research, 2012). There is an opportunity for accommodation operators to work together to better share market intelligence. The Local Tourism Organisation (LTO) model established by *Magnetic Island Tourism* provides a good example of what can be achieved through cooperation between operators on the island.

Although the various indicators are measured on different scales, the overall seasonality pattern is consistent across all data sources. The data point to a market that is highly sensitive to Easter, spring and summer school holiday periods. Further analysis of **water taxi patronage** from 2012 to 2017 (Figure 7) 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. It is interesting to note an increase in water taxi patronage in July 2014 and 2017.

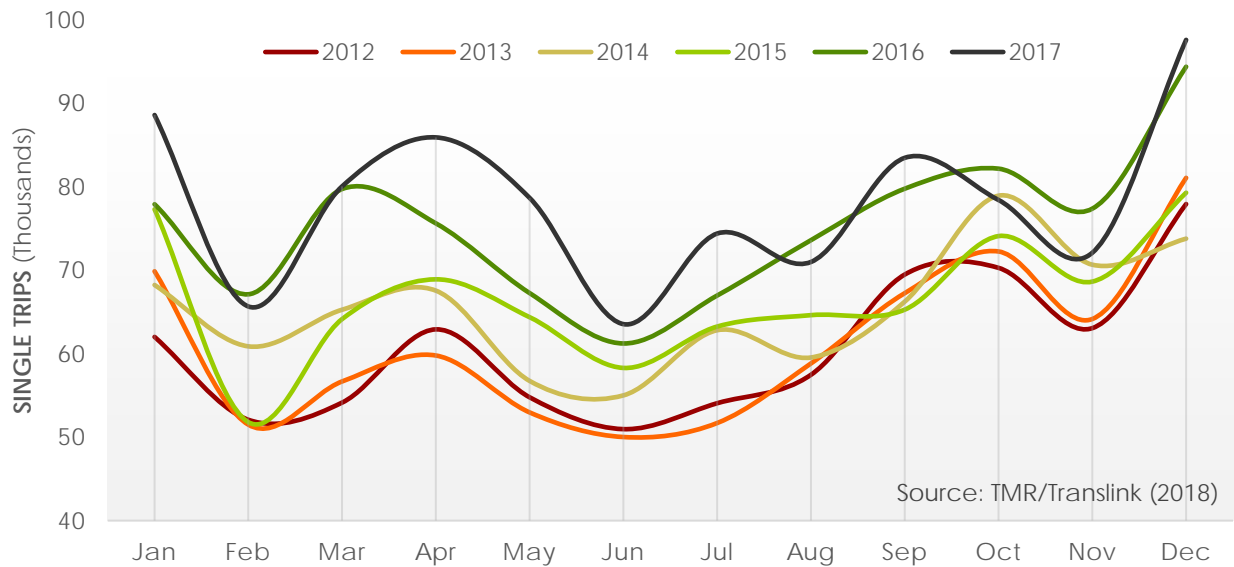
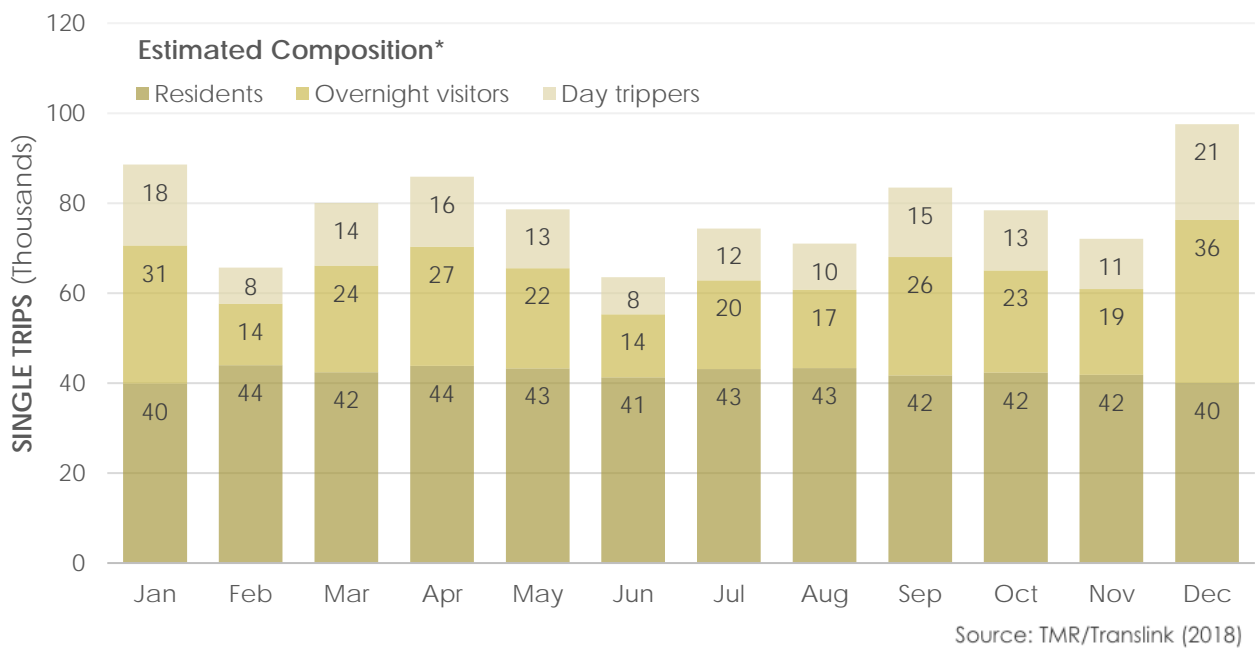


Figure 7. Seasonality analysis of water taxi patronage (2012-2017)

Based on screening questions to identify visitors during the survey work, we attempt to model the composition of water taxi patronage for each month. Figure 8 shows actual monthly water taxi patronage with composition estimates based on observations and accommodation occupancy data.



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

Figure 8. Monthly water taxi patronage with estimated composition (2017)

Economic benefits can be enhanced by increasing visitation in off-peak periods, particularly in February, May to August and November. 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 20 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 20. Seasonality by family lifecycle

	J	F	M	A	M	J	J	A	S	O	N	D
Young Singles	59%	28%	22%	24%	13%	13%	11%	20%	30%	30%	39%	57%
Couples	48%	41%	21%	31%	17%	21%	17%	17%	24%	17%	41%	48%
Full Nest I	61%	32%	29%	18%	21%	18%	21%	18%	32%	32%	36%	50%
Full Nest II	83%	14%	17%	32%	12%	22%	14%	9%	38%	18%	20%	48%
Full Nest III	74%	30%	35%	47%	23%	26%	28%	23%	53%	37%	35%	56%
Empty Nest	69%	22%	22%	31%	19%	28%	19%	25%	36%	19%	22%	39%
Older Singles	47%	33%	33%	53%	33%	13%	33%	53%	47%	40%	47%	60%

Sources: NSI Visitor Survey

An analysis of the **Google Trends** data for Australia further confirms the patterns observed above (Figure 9). 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.

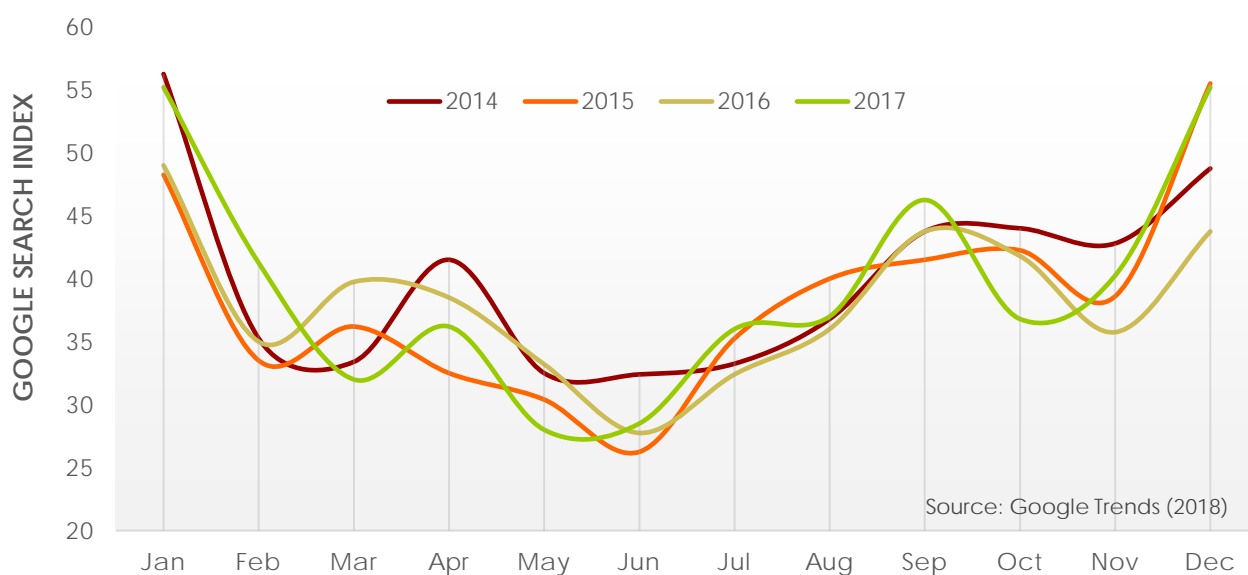


Figure 9. Seasonality analysis of Google Trends data (2014-2017)

Google Trends data also allows for benchmarking against other destination search terms. Figure 10 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 four years indicates a steady increase in search activity for Fraser, Bribie and Moreton, while search activity for Stradbroke Island has remained steady.

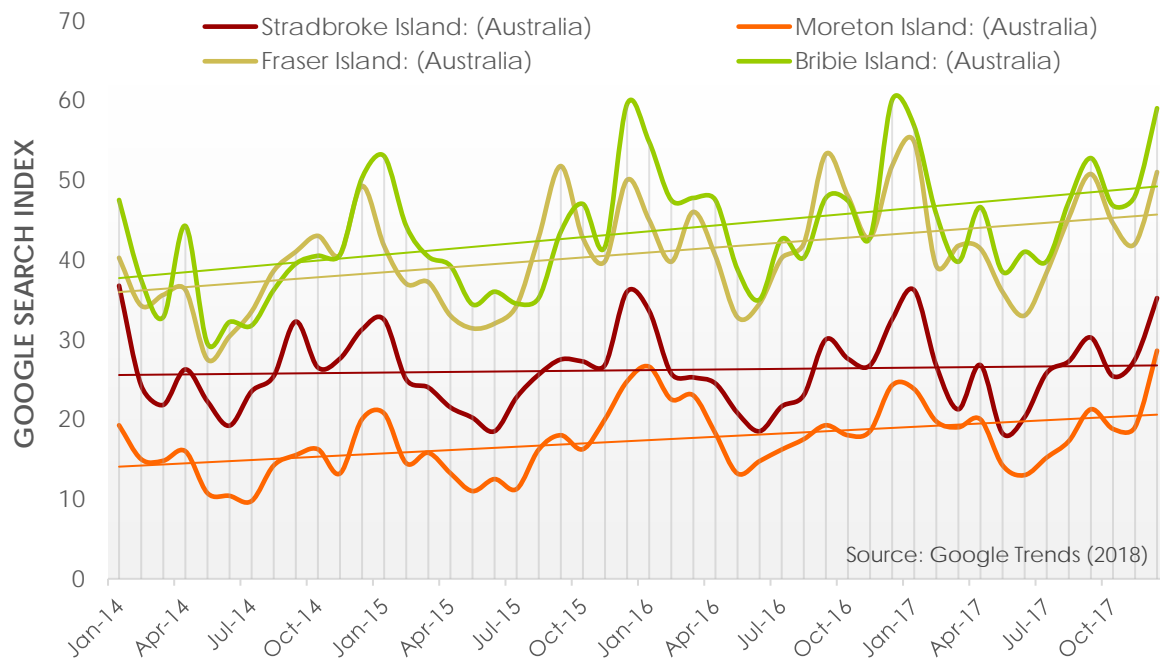


Figure 10. Seasonality analysis of benchmark destinations (Google Trends, 2014-2017)

3.5 Destination Awareness

3.5.1 Destination Familiarity

Potential visitors were asked whether they had heard of NSI (Table 21). Only 8.6% of potential visitors indicated that they had never heard of North Stradbroke Island, indicating a high level of general awareness. However, responses to other questions and the focus group discussions with non-visitors highlighted that there was some confusion in the marketplace between North Stradbroke Island, South Stradbroke Island and Moreton Island. 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. It may be necessary to conduct an awareness raising campaign if there is a desire to attract visitors from other states.

Table 21. Familiarity and past visits to NSI

	QLD	NSW	VIC	Other	Total
No, never heard of it	1.5%	21.9%	30.2%	25.0%	8.6%
No, but I've heard of it	39.6%	40.6%	55.8%	63.9%	43.0%
Yes, once before	30.8%	26.6%	9.3%	8.3%	26.6%
Yes, 2 to 5 times	18.7%	6.3%	0.0%	2.8%	14.1%
More than 5 times	9.4%	4.7%	4.7%	0.0%	7.6%

Source: Online Panel

Online Panel respondents who had heard of the island were asked to select images they identified with the island from a collection of nine photos (Figure 11).

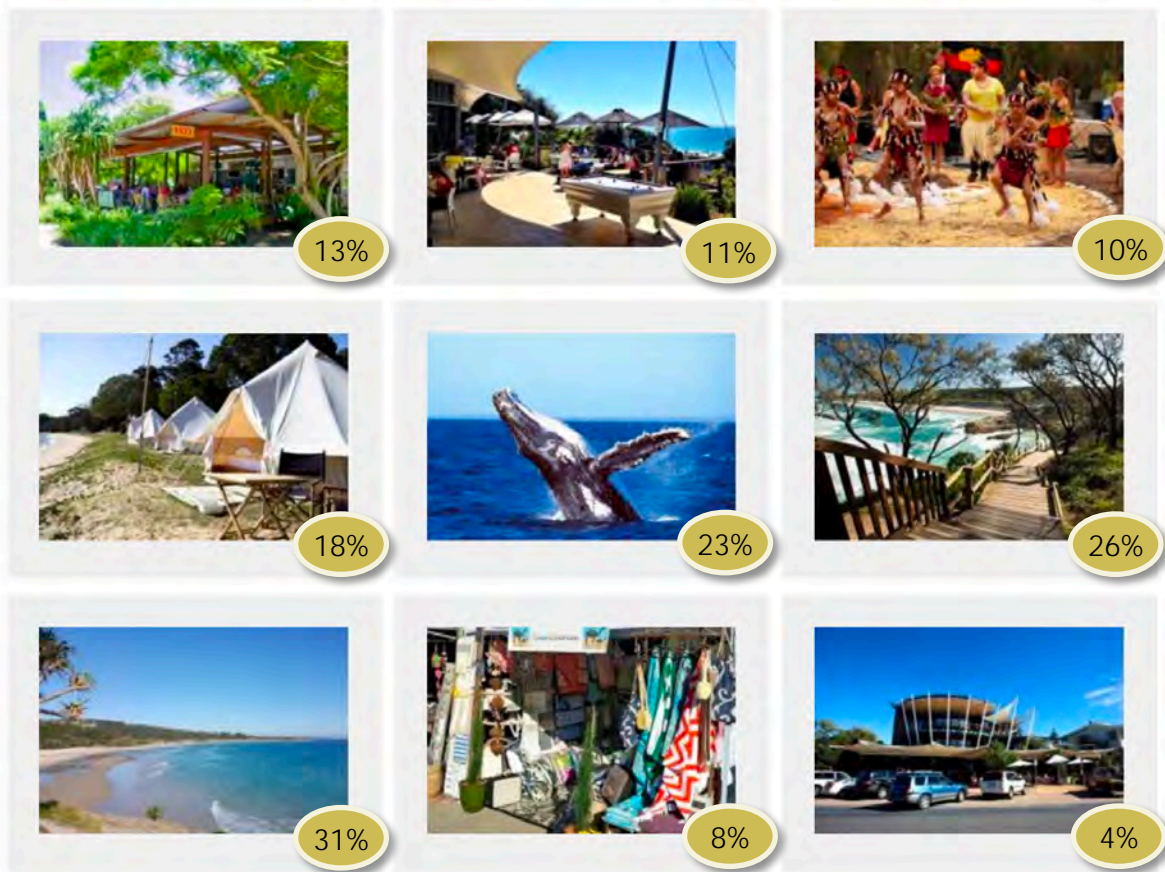


Figure 11. Identification of NSI images

The vast majority (77%) of potential visitors did not identify any of the images with North Stradbroke Island, indicating low general awareness of key destination attributes. 7% of potential visitors only selected one image, while 20% were able to identify between two to five images. The four most commonly selected images were related to beach and ocean themes. 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 NSI, while potential visitors were asked to indicate whether they intended to visit NSI in the future. The results in Table 22 indicate that NSI has a very high rate of **return/intended visitation**. Only a small percentage of respondents indicated that they did not intend to visit NSI in the future.

Table 22. Visit intentions

	Current Visitors			Potential Visitors		
	Day Trippers	Overnight Stays	Total	Day Trippers	Overnight Stays	Total
	n=232	n=392	N=624	n=62	n=373	n=435
No	-	-	0.2%	-	-	6.0%
Not sure	4.3%	3.6%	3.8%	27.4%	26.8%	26.9%
Yes, within 12 months	71.6%	76.8%	74.8%	6.5%	27.9%	24.8%
Yes, within 5 years	8.2%	11.7%	10.4%	9.7%	16.1%	15.2%
Yes, not sure when	15.9%	7.7%	10.7%	14.5%	29.2%	27.1%

Sources: NSI Visitor Survey, Online Panel

Both current and potential visitors were asked to rate how they perceived NSI as a tourist destination (Table 23). Current visitors were overwhelmingly positive in their evaluation of the NSI, particularly as one of Australia's best beach, island and nature-based destinations. Potential visitors were slightly less positive but their mean ratings still indicate a very positive overall response.

Table 23. Perceptions and satisfaction

	Current Visitors	Potential Visitors
One of Australia's best beach destinations	5.99	4.95
One of Australia's best island destinations	5.91	4.97
One of Australia's best nature-based destinations	5.81	5.16
One of Australia's best kept secrets	5.78	4.91
One of Australia's best wildlife destinations	5.54	4.78
Offers unique experiences	5.38	5.06
Offers many attractions and activities	5.27	4.88
Rich in Aboriginal culture	4.95	4.77
Would buy NSI products if available at home	4.83	4.28
Would order island products	3.76	3.63
I would like to visit North Stradbroke Island	n/a	5.67
Overall impression is positive	n/a	5.53
Would recommend to family & friends	6.53	n/a
Would visit island again	6.59	n/a
Overall satisfied with NSI visit	6.40	n/a

Mean based on 1=Strongly Disagree ... 7=Strongly Agree. Sources: NSI Visitor Survey, Online Panel

A more detailed distribution of responses to each item is shown in Figure 12 and Figure 13. These distributions indicate a high level of satisfaction with the destination from current visitors. The results for potential visitors also show that the market holds very positive impressions about the destination.

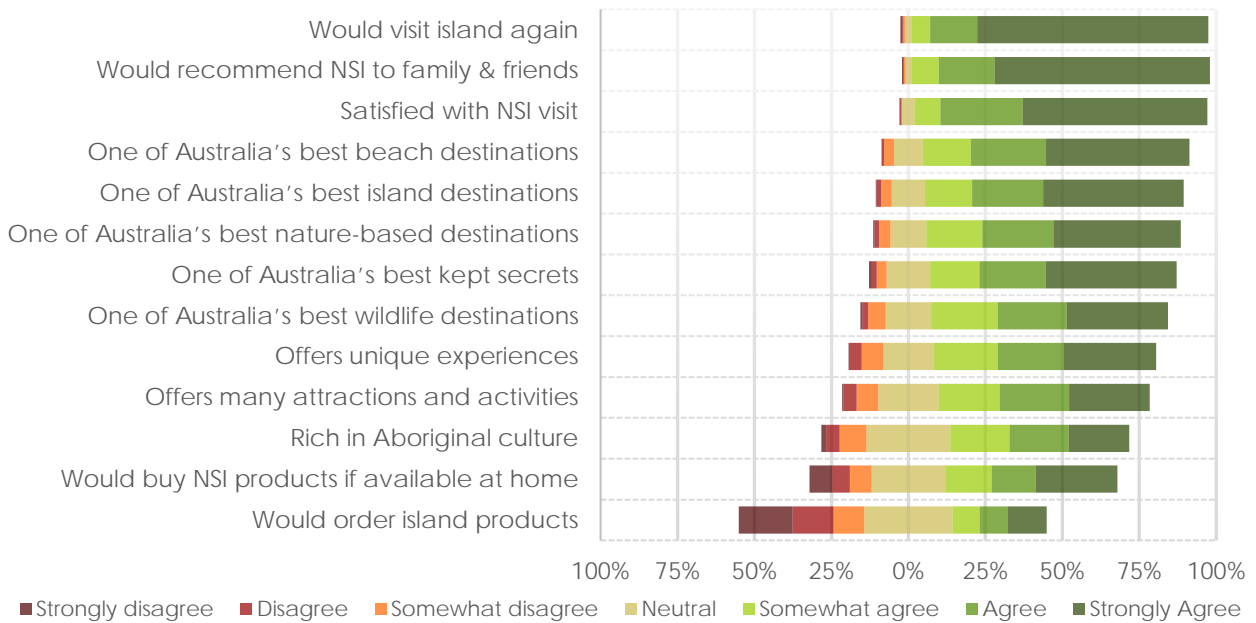


Figure 12. Current visitor perceptions and satisfaction with NSI

The perception question included two items about island products. 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 weak, possibly because the island does not offer distinctive or unique local products, or visitors are not aware of these.

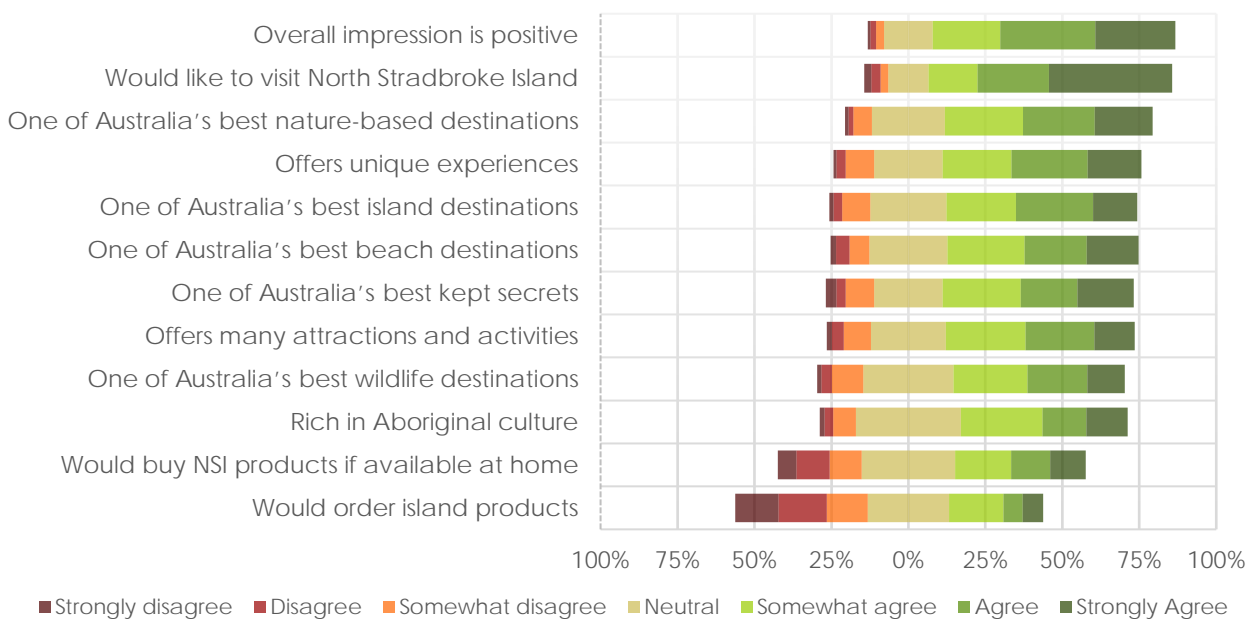


Figure 13. Potential visitor perceptions and impressions about NSI

3.5.3 Destination Attributes

Three main data sources (NSI visitor survey, online panel, focus groups) 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). The size of each word indicates how often the word was mentioned (colours are purely for aesthetics purposes and have no additional meaning). Larger words were mentioned considerably more often than smaller words.



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/picturesque/pretty, relaxing, peaceful/quiet, fun, beaches/sand/sandy and nature. Many respondents also described the island as a 'tropical' destination. There were some references to the island being 'remote' and 'isolated', although others described it as 'close'.

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 NSI is perceived by potential visitors as an adventurous family destination that would attract campers, nature/beach lovers, fishermen, surfers and locals.

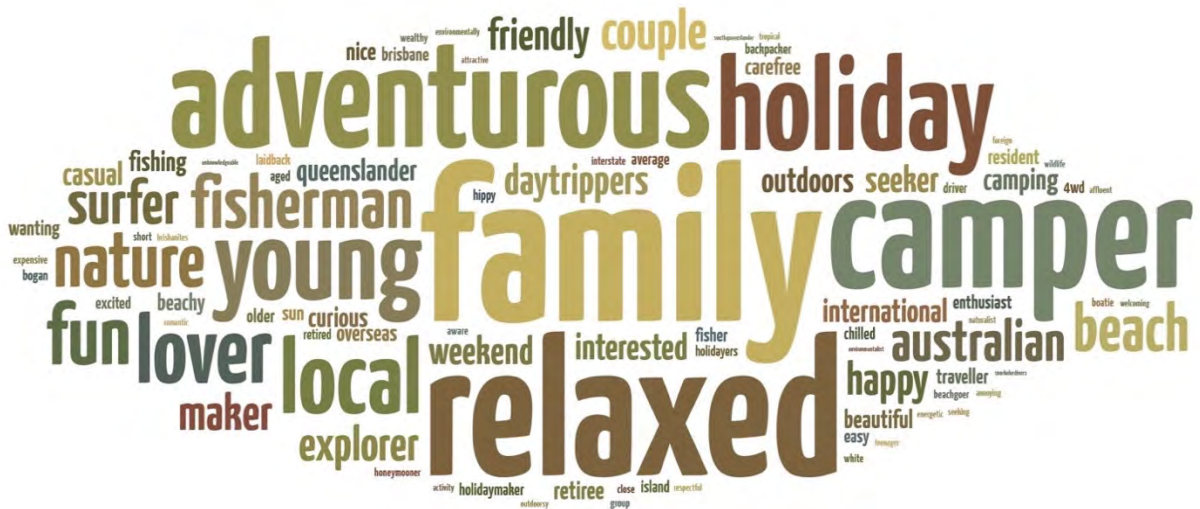


Figure 15. Potential visitors' descriptions of the 'typical' NSI visitors

Current visitors were asked to describe the two best things about their visit to NSI (Figure 16). Current visitors were more likely than potential visitors to use terms such as 'walks', 'water', 'swimming' and 'wildlife'/'dolphins'. Whales were not mentioned frequently by either current or potential visitors. Current visitors showed greater awareness of specific attractions and locations such as North Gorge Walk, Cylinder Beach, Pt Lookout, Brown Lake and Blue Lake than potential visitors. Both current and potential visitors described the island as a family destination.



Figure 16. Positive destination attributes for current visitors

In the focus groups, the perceptions of non-visitors were focussed on beach activities such as swimming, surfing and fishing. There was no awareness of local events/festivals, indigenous communities living on the island, or opportunities for alternative activities such as wildlife viewing. There was some doubt that good food and dining experiences would be available (other than fish and chips), and a common perception that visitors needed 4WD vehicles to access the beaches. Most of the group 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 to non-existent. Some international participants thought you could only get there as part of a tour and did not realise that independent travel was possible. In contrast, the visitor focus groups mentioned water-based activities as well as land-based activities like bushwalks, beach walks, koalas and kangaroos as key destination attributes. They also described the island as relaxing and a place to get away from things.

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 NSI (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 NSI 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 3.5 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 shows that most of the infrastructure and convenience/cost items can be improved. Improving **WiFi 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 WiFi in major tourist areas. Free WiFi 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 WiFi is combined with an active strategy to encourage visitors to share photos through the use of selfie spots or Snapchat filters. While several NSI businesses offer free WiFi, 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 such as barbecues and tables.

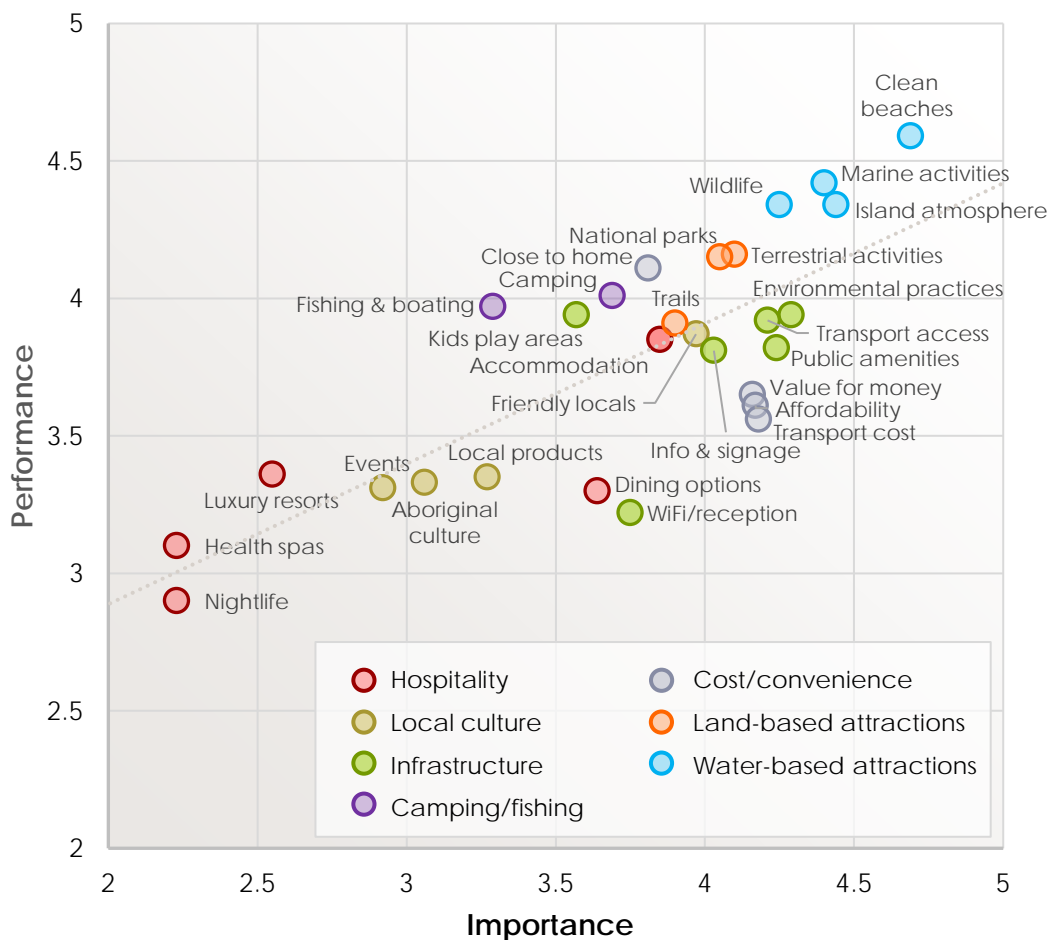


Figure 17. Importance-Performance analysis of destination attributes for current visitors

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 of **value for money**. 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** 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. This issue was identified several times in the survey work, focus groups and analysis of TripAdvisor data (see Food and Dining). The results also highlight that the island excels in **water-based** 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 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. NSI stakeholders therefore need to consider how the profile of the island can be raised in the minds of potential visitors. In addition, the natural assets of NSI will need to be carefully managed and nurtured as any loss in amenity is likely to impact on visitor satisfaction.

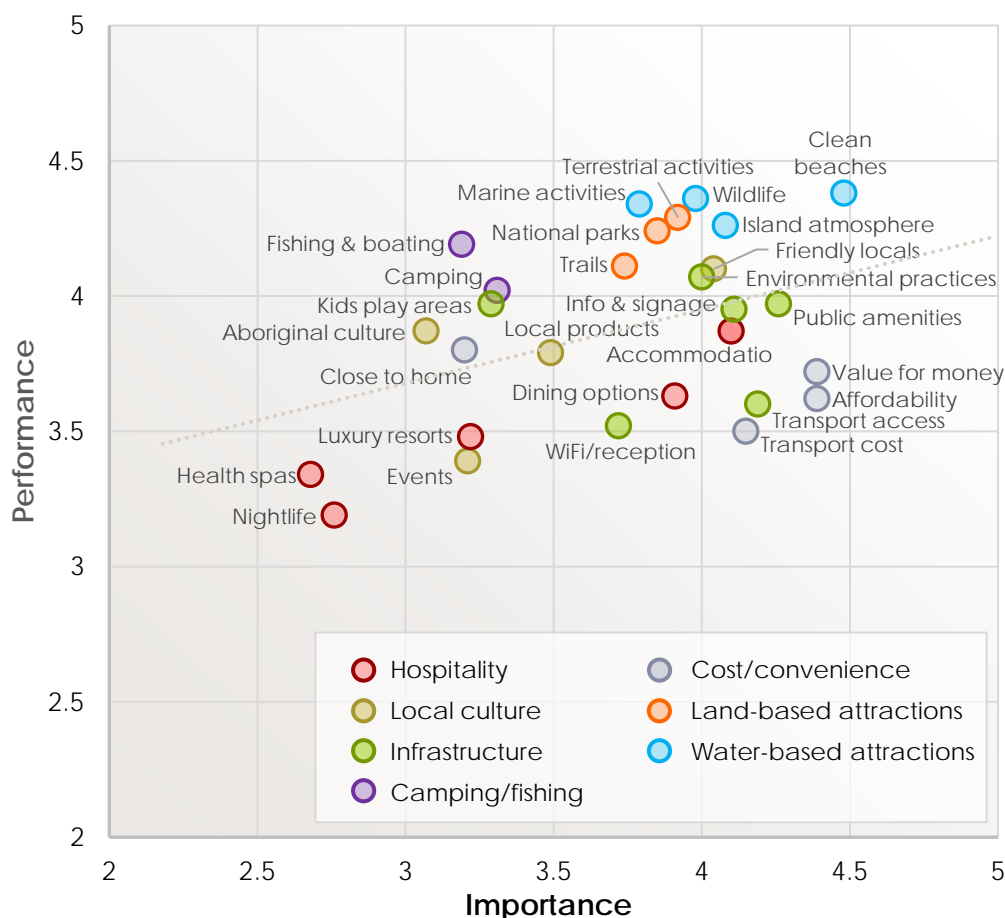


Figure 18. Importance-Performance analysis of destination attributes for Potential Visitors

The results from the Online Panel also identified **water-based** and **land-based** attractions as attributes that were positively evaluated by potential visitors (Figure 18). WiFi, transport, dining options and convenience/cost were identified by potential visitors as areas for improvement. However, potential visitors also rated **events** as more important than did 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.

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 NSI relative to other destinations. Current visitors were asked whether they considered any other destinations when planning their trip to NSI. The results in Table 24 indicate that destinations which share similar features to NSI (i.e. beaches, national parks, wildlife) were most likely to be considered by current visitors. However, the focus groups revealed that NSI'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 North Stradbroke Island's unique selling point. The results highlight the need for marketing campaigns to clearly differentiate NSI from these destinations.

Table 24. Destinations considered when planning an NSI trip

	N	Percent
Only NSI	242	37.3%
Moreton Island	104	16.0%
Sunshine Coast/Noosa	93	14.3%
Fraser Island/Rainbow Beach	73	11.2%
Gold Coast	64	9.9%
Northern NSW/Byron Bay	63	9.7%
Brisbane	49	7.6%
Bribie Island	28	4.3%
Overseas Island destinations	28	4.3%
Other	6	0.9%

Source: NSI Visitor Survey

Visitors were also asked whether NSI was the only destination they visited during the trip. Table 25 indicates that NSI was the only destination of the trip for a majority of visitors (85.5%). The result is likely due to the large number of visitors originating from within 50km of the island (see Market Origin). Those who combined NSI with other destinations were likely to visit Brisbane, the Gold Coast and the Sunshine Coast.

Table 25. Single destination and multi-destination preferences

	N	Percent
Yes	555	85.5%
No ...	47	7.2%
Brisbane	35	5.4%
Gold Coast	16	2.5%
Sunshine Coast	14	2.2%
Other	5	0.8%

Source: NSI Visitor Survey

Potential visitors and non-visitors (those who indicated they did not intend to visit NSI) were asked how likely they were to visit a selection of island and beach destinations (including NSI) in the next five years (Figure 19). The results indicate that NSI 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).

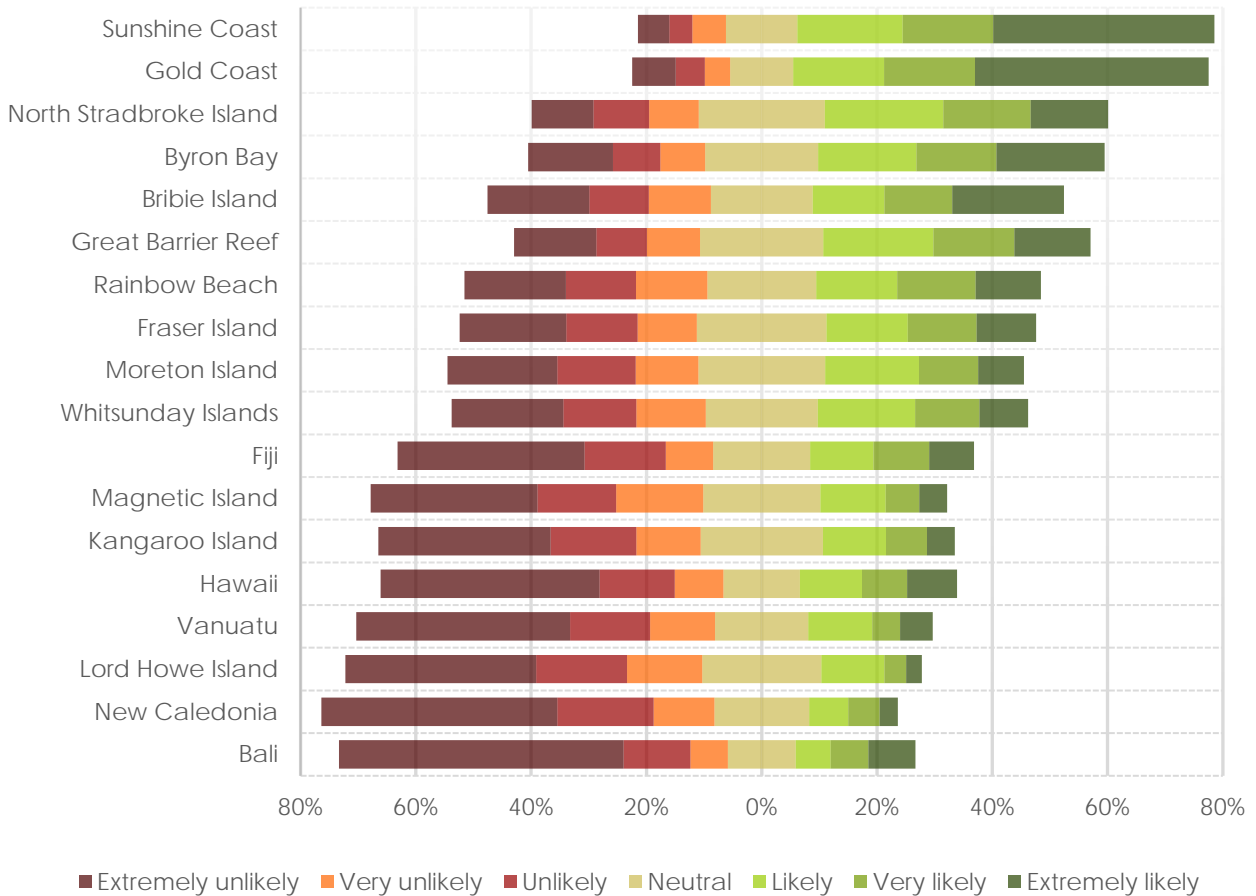


Figure 19. Likelihood of visiting in the next 5 years

The favourable positioning of NSI is likely to be strongly driven by accessibility. Table 26 shows the mean visitation likelihood ratings of respondents based on how far they live from Dunwich. This breakdown highlights that Bribie Island becomes a more viable competitor for those living within 100km of Dunwich, while Byron Bay becomes more attractive for respondents living within 100-200km (including Northern NSW). The Gold Coast, Sunshine Coast, Byron Bay and Great Barrier Reef were all stronger attractors for respondents living more than 200km away.

Table 26. Visitation likelihood by distance from NSI

	Less than 50km	50km to 100km	100km to 200km	More than 200km	Total
Sunshine Coast	5.83	5.86	4.67	4.37	5.34
Gold Coast	5.71	5.22	4.88	4.86	5.31
North Stradbroke Island	4.82	4.22	3.82	3.68	4.31
Byron Bay	4.67	4.03	4.69	3.76	4.31
Great Barrier Reef	4.31	4.05	3.58	4.21	4.16
Bribie Island	4.76	4.66	3.27	2.85	4.10
Rainbow Beach	4.25	4.07	3.55	3.09	3.85
Fraser Island	4.11	3.78	3.45	3.31	3.77
Whitsunday Islands	4.00	3.42	3.23	3.50	3.67
Moreton Island	4.12	3.90	3.06	2.87	3.64
Fiji	3.32	2.93	2.60	3.39	3.18
Magnetic Island	3.25	2.91	2.78	3.04	3.08
Kangaroo Island	3.20	2.53	2.59	3.50	3.08
Hawaii	3.19	2.51	2.41	3.41	3.03
Vanuatu	3.04	2.63	2.47	2.89	2.86
Lord Howe Island	2.99	2.49	2.55	2.92	2.82
Bali	2.67	2.07	2.35	3.14	2.64
New Caledonia	2.73	2.45	2.06	2.71	2.60

Means based on 1 = Extremely unlikely ... 7 = Extremely likely

Source: Online 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 27).

Table 27. Average TripAdvisor satisfaction ratings

Destination	Accommodation	Restaurants	Activities
Bribie Island	4.03	3.91	4.60
Fraser Island	3.96	3.59	4.61
Kangaroo Island	4.26	4.28	4.55
Magnetic Island	4.13	4.18	4.44
Moreton Island	4.00	3.46	4.32
North Stradbroke Island	3.97	3.78	4.72

Means based on 1 = Terrible ... 5 = Excellent

Source: TripAdvisor

The results highlight that NSI receives very positive ratings for activities, outperforming all of the benchmark island destinations. The island is rated less well for its restaurants and is rated close to the bottom for 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 NSI Visitor Survey revealed that **22.2% 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 recalls were for local signage, billboards and newspaper advertisements around the Redlands, Brisbane and at Brisbane Airport. There were several mentions of the 'I ♥ Straddie' bumper stickers, which are increasingly visible on private vehicles throughout Southeast Queensland. There was strong recall of advertising on ferries and buses while visitors were in transit to the island. A number of visitors also recalled seeing information about the island on television advertisements and travel shows. Aside from these sources, visitors recalled hearing about NSI through friends and family – usually traditional word of mouth or electronic word of mouth through social media (particularly Facebook and Instagram).



Figure 20. Unprompted advertising awareness/information sources

On the other hand, only **7% of potential visitors** 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 NSI on television and radio and seeing newspaper advertisements, brochures and information on social media (similar findings are reported below for Information Sources). When respondents were prompted with specific advertisements, recall was similarly low, ranging from 2% to 6% (Figure 21). Recall was highest for the Stradbroke Ferries advertisement.



Figure 21. Prompted advertising recall (Online Panel)

Participants on the visitor and non-visitor focus groups both had difficulty recalling any NSI advertising but organic word-of-mouth from family and friends was mentioned several times. The non-visitor focus group attributed their lack of knowledge about NSI 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 – everything they knew was based on friends' experiences.

A lack of funding and coordination has constrained marketing campaigns directed at attracting visitors to the island. NSI is part of several larger branding portfolios, including TEQ's Southern Queensland region, Brisbane Marketing, Redland City Council, the Straddie Chamber of Commerce and efforts to create an integrated marketing brand for the Moreton Bay Islands, Redland Coast and 'Quandamooka Coast'. 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. Careful coordination will be 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, while potential visitors were prompted to select sources of information about NSI they recalled seeing or hearing in the last 12 months. The results in confirm that recall of **information sources** was low for potential visitors (Table 28).

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 NSI. The results highlight that the ferry providers and holiday rental companies have a high level of online visibility when visitors search for information. Some visitors continue to rely on information from ferry companies during their trip – presumably to check timetables and pricing, but some ferry websites also contain other information about the destination. Once on the island, visitors also relied on signage, Google/Google Maps, and advice from family and friends.

The relative 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. Many visitors will not look anywhere else for information. This will become even more critical as travellers move to using artificial intelligence (AI) agents such as Google Assistant, Siri and Alexa for their information search needs. The CSIRO's (2013) report on the future of tourism in Queensland highlights the way visitors access and trust information in an online world as a major megatrend.

Table 28. Information sources used (current visitors) or recalled (potential visitors)

	Current Visitors (Before)		Current Visitors (During)		Potential Visitors	
	N	Percent	N	Percent	N	Percent
stradbrokeisland.com	215	33.1%	61	9.4%	30	7.3%
Google/Google Maps	266	41.0%	172	26.5%	-	-
Ferry website	409	63.0%	85	13.1%	18	4.4%
Holiday rental website	112	17.3%	17	2.6%	13	3.2%
Private accommodation website	70	10.8%	12	1.8%	13	3.2%
Social media	80	12.3%	48	7.4%	46	11.2%
Blogs/forums/reviews	51	7.9%	14	2.2%	6	1.5%
Online videos	22	3.4%	2	0.3%	13	3.2%
Online Travel Agent	19	2.9%	6	0.9%	11	2.7%
Internet Advertisements	-	-	-	-	25	6.1%
Other websites	30	4.6%	10	1.5%	22	5.4%
Mobile Apps	13	2.0%	13	2.0%	-	-
Email newsletters	3	0.5%	6	0.9%	7	1.7%
Travel agent	6	0.9%	4	0.6%	27	6.6%
Visitor Information Centre	16	2.5%	22	3.4%	19	4.6%
Motoring club	3	0.5%	2	0.3%	18	4.4%
Print media	11	1.7%	10	1.5%	33	8.1%
TV/Radio	8	1.2%	8	1.2%	38	9.3%
Brochures/visitor guides	48	7.4%	93	14.3%	21	5.1%
Billboards or posters	-	-	-	-	14	3.4%
Signage on NSI	-	-	190	29.3%	-	-
Nat parks brochures/signs	34	5.2%	83	12.8%	-	-
Family or friends	302	46.5%	164	25.3%	98	24.0%
Local business/residents			82	12.6%	-	-
Other	37	5.7%	22	3.4%	26	6.4%

Source: NSI Visitor Survey, Online Panel

Table 29 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 29. Mobile device use during visit

	Smartphone	Tablet	Laptop
Finding information about the island	59.9%	9.1%	8.9%
Finding out about events and activities	28.4%	4.3%	4.3%
Booking accommodation or transport	29.6%	4.9%	11.1%
Reading reviews of activities or restaurants	25.7%	3.1%	3.5%
Finding my way	48.7%	3.5%	2.2%
Sharing experiences on social media	52.7%	3.9%	1.8%

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.

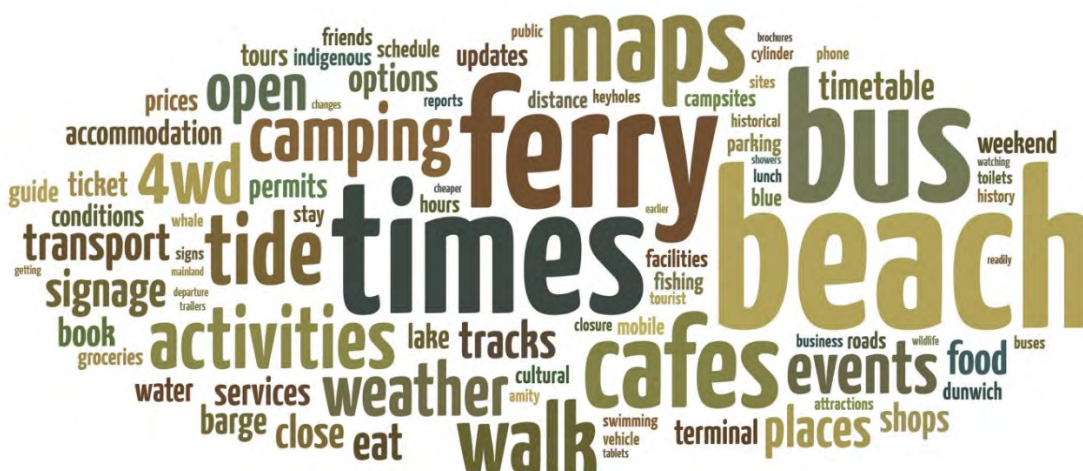


Figure 22. Information needs of current visitors

Improvements to meet the information needs of visitors can be grouped into a number of key areas, including:

- Transport, ferries, buses (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)
- Activities and events (locations, opening times, cost)
- Restaurants (prices, locations, menus, open hours, reservations)
- Camping sites (locations, prices, facilities, maps, photos)
- Local information (indigenous and non-indigenous heritage)
- Maps (tourist maps, walking tracks, bicycle tracks, 4WD access)

While much of this information exists online, it is highly fragmented, hard to find and often outdated, making trip planning a time-consuming and frustrating process. There is enormous variability in quality of websites that contain information about the island.

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. Both groups indicated that word-of-mouth (WoM) was their main source of information and both thought it was important to advertise more widely key services, facilities and activities. Visitors did not seem to remember the names of places they had visited, suggesting that additional signage and advertising of places and attractions would be beneficial.

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 30). 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, surprisingly few visitors used public transport. This may be because many visitors were travelling in family or friendship groups or were unaware of public transport options.

Table 30. Transport modes used by visitors

	N	Percent
Getting to the Island		
Car ferry	415	63.9%
Water taxi	241	37.1%
Own vehicle	239	36.8%
Bus	60	9.2%
Train	20	3.1%
Private vessel	9	1.4%
Rental vehicle	6	0.9%
Bicycle	3	0.5%
Taxi or ride share	1	0.2%
Other	5	0.8%
Getting around the island		
Own vehicle	430	66.3%
Bus	167	25.7%
Walking	141	21.7%
Local's vehicle	30	4.6%
Rental vehicle	17	2.6%
Bicycle	12	1.8%
Taxi	6	0.9%
Other	12	1.8%

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 island shuttle bus or walked. The use of bicycles was much lower than expected, given the topography and 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 when current visitors were asked to provide suggestions for improving transport (Figure 23).



Figure 23. Transport improvements

The transport improvements suggested by current visitors included:

- More frequent/regular ferry services or staggering departure times between two water taxi companies
- Reducing confusion about different departure points for ferries at Dunwich
- Subsidising vehicle ferry prices to make them more affordable
- More frequent bus services, a hop-on/hop-off service, better connectivity between buses and ferries
- Including the cost of the bus in the ferry ticket
- Vehicle, moped, Segway and/or bicycle hire in Dunwich
- More bicycle paths/trails
- Better access to Amity Pt, Brown Lake, Blue Lake, and Keyholes
- More taxis and ride sharing services (e.g. Uber)
- Ability to use go card on water taxis and island bus service

It is clear that 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. While 4 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 31 provides a summary of off-peak return ferry prices for several Australian off-shore island destinations.

Table 31. 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 NSI 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 32 provides a breakdown of accommodation preferences for current and potential visitors. Holiday rentals (28.7%) and camping (27.5%) were the most common styles of accommodation used by current visitors.

Table 32. Accommodation preferences

	Current Visitors		Potential Visitors	
	N	Percent	N	Percent
Holiday rental	117	28.7%	173	42.3%
Tent or camping	112	27.5%	103	25.2%
Visiting friends or relatives (VFR)	53	13.0%	14	3.4%
Own property	51	12.5%	7	1.7%
Caravan park	29	7.1%	84	20.5%
Hotel or resort	27	6.6%	189	46.2%
Cabin	17	4.2%	192	46.9%
Apartment	17	4.2%	186	45.5%
Backpackers	12	2.9%	17	4.2%
B&B or guest house	5	1.2%	125	30.6%
Boat or yacht	-	-	22	5.4%
Other	10	2.5%	3	0.7%

Source: NSI Visitor Survey, Online Panel

Potential visitors were asked to indicate the styles of accommodation they would be most likely to choose. The results indicate strong demand for holiday rentals, hotel/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 33).

Table 33. Accommodation preferences by family lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Holiday rental	59.6%	53.1%	62.2%	41.2%	38.2%	35.0%	37.5%
Hotel or resort	57.4%	62.5%	52.7%	41.2%	47.1%	50.0%	52.5%
Apartment	53.2%	50.0%	59.5%	41.2%	47.1%	48.8%	45.0%
Cabin	38.3%	53.1%	59.5%	49.0%	58.8%	47.5%	60.0%
B&B/guest house	46.8%	46.9%	32.4%	23.5%	32.4%	26.3%	40.0%
Tent or camping	36.2%	40.6%	29.7%	33.3%	38.2%	6.3%	25.0%
Caravan park	12.8%	18.8%	25.7%	29.4%	41.2%	12.5%	25.0%
Backpackers	12.8%	9.4%	2.7%	3.9%	0.0%	0.0%	10.0%
Boat or yacht	8.5%	15.6%	4.1%	7.8%	2.9%	2.5%	2.5%
VFR	6.4%	6.3%	0.0%	9.8%	0.0%	3.8%	0.0%
Own property	4.3%	0.0%	2.7%	2.0%	0.0%	0.0%	0.0%
Other	2.1%	0.0%	0.0%	0.0%	2.9%	0.0%	2.5%

Source: Online Panel

Demand for hotel/resort accommodation was strongest for young singles (57.4%) and couples (62.5%) but was high across all lifecycle stages. Holiday rentals and apartments were more appealing to young singles, couples and younger families. B&Bs were more attractive to young singles (46.8%) and couples (46.9%). Support for backpacker-style accommodation was surprisingly weak across all family lifecycle stages. The interest in cabins is evident across all lifecycle stages, from young couples to older singles and appears to align with current plans to develop ‘glamping’ style accommodation on the island. A comparison of the accommodation preferences of potential visitors by total daily spend shows that cabins are likely to attract higher yield markets (Table 34). Higher yield markets were also interested in hotels, resorts, holiday rentals and apartments.

Table 34. Accommodation preferences by total daily spend

	Up to \$135	\$136-\$235	Over \$235
Holiday rental	40.3%	43.1%	54.0%
Hotel or resort	35.8%	50.9%	59.0%
Apartment	31.3%	50.0%	58.4%
Cabin	38.8%	52.6%	55.9%
B&B/guest house	28.4%	31.9%	36.6%
Tent or camping	49.3%	25.9%	21.7%
Caravan park	28.4%	21.6%	22.4%
Backpackers	7.5%	4.3%	2.5%
Boat or yacht	3.0%	5.2%	8.1%
VFR	3.0%	2.6%	4.3%
Own property	3.0%	0.9%	1.9%
Other	0.0%	0.9%	1.2%

Source: Online 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

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

- Better camping facilities (e.g. toilets, showers, camp kitchens, water fountains, electricity, charging stations, WiFi, cleanliness, waste management, dumping points for portaloos, BBQs)
- Availability and affordability of accommodation, particularly during peak times
- More variety in accommodation styles (e.g. ensuite cabins, caravan parks, houseboats, ecolodges and environmentally friendly accommodation, more family accommodation, pet-friendly options)
- Ability to book a range of accommodation online or to package accommodation with other travel components such as buses and ferries



Figure 25. Accommodation improvements

The focus groups revealed that 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 35). The results indicate that all three townships received heavy visitation, although the results do not reveal how much time visitors spent at each location. Dunwich was most likely selected because it is the gateway to the island. A number of beaches were identified by visitors in the 'Other' category and these are included in the results. It is likely that more visitors visited these beaches than suggested by the data in the table.

Blue Lake, 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. Signage at key sites like national parks, conservation areas and beaches would create a 'sense of place' and provide opportunities for visitors to share their experiences on social media.

Table 35. Visitor settings and attractions

	N	Percent
Point Lookout	557	85.8%
Dunwich	439	67.6%
Cylinder Beach	402	61.9%
North Gorge Walk	354	54.5%
Amity Point	333	51.3%
Brown Lake	221	34.1%
Frenchman's Beach	180	27.7%
Myora Springs Conservation Area	96	14.8%
Blue Lake	42	6.5%
NSI Historical Museum	27	4.2%
Naree Budjong Djara National Park	26	4.0%
Other: Main Beach	29	4.5%
Other: Home Beach	22	3.4%
Other: Deadman's Beach	16	2.5%
Other: Adder Rock	12	1.8%
Other: Flinders Beach	10	1.5%
Other	18	2.8%

Source: NSI Visitor Survey

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 NSI (Table 36).

Table 36. Activity and experience preferences

	Current Visitors		Potential Visitors	
	N	Percent	N	Percent
Water sports	427	65.8%	219	53.5%
Wildlife spotting	366	56.4%	229	56.0%
Whales, dolphins & turtles	336	51.8%	317	77.5%
Bush walking	198	30.5%	230	56.2%
Bird watching	166	25.6%	119	29.1%
Shopping	145	22.3%	129	31.5%
Camping	138	21.3%	119	29.1%
Four-wheel driving	137	21.1%	107	26.2%
Fishing & boating	109	16.8%	120	29.3%
Snorkelling/diving	92	14.2%	155	37.9%
Markets	72	11.1%	246	60.1%
Land-based sports	65	10.0%	81	19.8%
Aboriginal culture	61	9.4%	112	27.4%
Events or festivals	57	8.8%	126	30.8%
Museums/art galleries	41	6.3%	130	31.8%
Massage & spa treatments	8	1.2%	96	23.5%
Organised tour	5	0.8%	102	24.9%
Other: Dining	17	2.6%	-	-
Other: Work	8	1.2%	-	-
Other: Relaxing at beach	6	0.9%	-	-
Other: Going for a walk	5	0.8%	-	-
Other: Visiting friends/family	4	0.6%	-	-
Other: Research	3	0.5%	-	-
Other	8	1.2%	4	1.0%

Source: NSI Visitor Survey, Online Panel

The results indicate that water sports (e.g. swimming, kayaking, surfing)(65.8%), spotting island wildlife (56.4%), and watching whales, dolphins and turtles were major activities for current visitors (51.8%). Potential visitors also indicated that the opportunity to watch whales, dolphins and turtles (77.5%), see island wildlife (56.0%) and water sports (53.5%) would attract them to the island. Unlike current visitors, potential visitors also showed strong interest in markets (60.1%), bush walking (56.2%), and snorkelling or diving (37.9%). Marketing campaigns that feature these opportunities will attract more potential visitors, provided the island can deliver these experiences at a high standard.

The activity preferences of potential visitors can be further explored by examining these preferences by family lifecycle (Table 37). The results indicate that interest in activities such as visiting museums and galleries, bird watching, and learning about Aboriginal culture generally increases with family lifecycle. The results also indicate that younger couples and older families (Full Nest III) are interested in the widest range of activities.

Table 37. Activity and experience preferences by family lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Whales, dolphins...	51.9%	87.9%	82.9%	79.6%	88.6%	80.9%	87.0%
Markets	46.2%	60.6%	69.7%	55.6%	68.6%	63.8%	58.7%
Bush walking	50.0%	57.6%	52.6%	59.3%	68.6%	56.4%	65.2%
Wildlife spotting	46.2%	57.6%	67.1%	55.6%	48.6%	56.4%	58.7%
Water sports	57.7%	63.6%	65.8%	68.5%	62.9%	31.9%	43.5%
Snorkelling/diving	51.9%	69.7%	43.4%	33.3%	45.7%	23.4%	21.7%
Museums/galleries	23.1%	36.4%	28.9%	27.8%	34.3%	39.4%	39.1%
Shopping	25.0%	36.4%	30.3%	29.6%	37.1%	34.0%	32.6%
Events or festivals	32.7%	45.5%	38.2%	20.4%	31.4%	28.7%	28.3%
Bird watching	17.3%	24.2%	30.3%	24.1%	31.4%	35.1%	43.5%
Fishing & boating	25.0%	36.4%	22.4%	44.4%	31.4%	30.9%	21.7%
Camping	28.8%	33.3%	34.2%	37.0%	42.9%	12.8%	26.1%
Aboriginal culture	17.3%	27.3%	21.1%	27.8%	25.7%	27.7%	52.2%
Four-wheel driving	32.7%	42.4%	25.0%	37.0%	34.3%	13.8%	15.2%
Organised tour	17.3%	30.3%	19.7%	18.5%	34.3%	28.7%	34.8%
Massage & spa	26.9%	42.4%	21.1%	24.1%	17.1%	20.2%	23.9%
Land-based sports	26.9%	27.3%	34.2%	22.2%	17.1%	8.5%	8.7%
Other	1.9%	0.0%	0.0%	0.0%	0.0%	2.1%	2.2%

Source: Online 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 38 indicates that lower yield visitors are more interested in camping, fishing and boating, while higher yield visitors are more interested in learning about Aboriginal culture, museums and galleries, shopping organised tours, massage and spa treatments.

Table 38. Activity and experience preferences by daily spend

	Up to \$135	\$136-\$235	Over \$235
Whales, dolphins & turtles	70.7%	83.5%	79.5%
Markets	57.3%	56.7%	67.6%
Bush walking	57.3%	59.8%	54.5%
Wildlife spotting	49.3%	56.7%	58.0%
Water sports	54.7%	53.5%	58.0%
Snorkelling or diving	42.7%	34.6%	39.8%
Museums/art galleries	28.0%	29.1%	35.8%
Shopping	26.7%	28.3%	38.6%
Events or festivals	30.7%	29.9%	34.1%
Bird watching	28.0%	28.3%	30.1%
Fishing and boating	40.0%	26.8%	29.0%
Camping	44.0%	27.6%	23.9%
Aboriginal culture	16.0%	28.3%	30.7%
Four-wheel driving	33.3%	18.9%	29.0%
Organised tour	21.3%	22.8%	29.5%
Massage & spa treatments	22.7%	18.9%	28.4%
Land-based sports	12.0%	19.7%	23.9%
Other	2.7%	1.6%	0.0%

Source: Online Panel

TripAdvisor reviews for activities on the island were largely positive. The average rating of 4.72/5.00 reported earlier in this report was higher than for other benchmark island destinations. Less than 5% of reviews were negative (ratings between 1 and 3). Analysis of negative reviews did not reveal any clear or consistent themes for improvement.

Current visitors provided a number of suggestions for improving activities and experiences on the island (Figure 26). These suggestions can be grouped under the following key themes:

- Indigenous experiences: cultural experiences, arts, crafts, dance, tours, self-guided walks, bush tucker
- European history and sand mining history
- More walking and cycling trails
- Land-based activities: horse riding, camel riding, 4WD tours, zip lines, bicycle tours, Segway tours, skydiving, eco and wildlife tours, nocturnal wildlife tour (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
- Equipment hire: bicycles, electric bicycles, motorised skateboards, golf buggies, boats, and water sports



Figure 26. Suggestions for new activities and experiences

3.6.4 Indigenous Tourism Experiences

The previous analysis of ‘Activities and Experiences’ indicates only moderate support activities that involved learning about Aboriginal culture. Likewise, the earlier section on ‘Reasons for Visiting’ and ‘Destination Attributes’ indicates that Aboriginal culture was less important to both current and potential visitors. 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 39).

Table 39. Likelihood of participating in Indigenous experiences

	Current Visitors	Potential Visitors
Aboriginal operated whale watching tour	3.53	3.78
Visit an Aboriginal cultural site	3.54	3.74
Aboriginal cultural centre or gallery	3.44	3.66
Aboriginal dance, music or cultural performance	3.52	3.66
Learn about Aboriginal bush tucker	3.52	3.59
Island tour with an Aboriginal guide	3.33	3.58
Purchase Aboriginal art/craft or souvenirs	3.32	3.42
Learn about boomerangs, spears or other weapons	3.29	3.43
Aboriginal operated accommodation	3.12	3.38

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 visit an Aboriginal cultural site or to participate in an Aboriginal whale watching tour was rated most likely by both current and potential visitors. There was also some support 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 tourist and potential visitors.

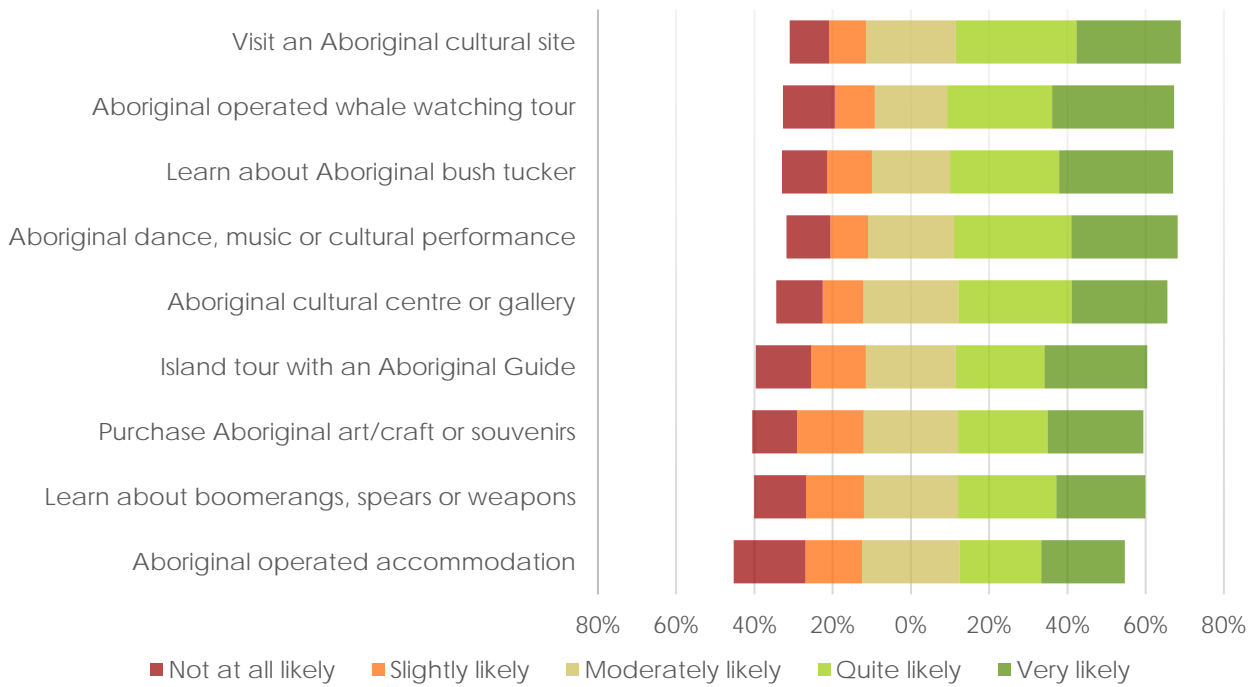


Figure 27. Current Visitors likelihood of participating in Indigenous experiences

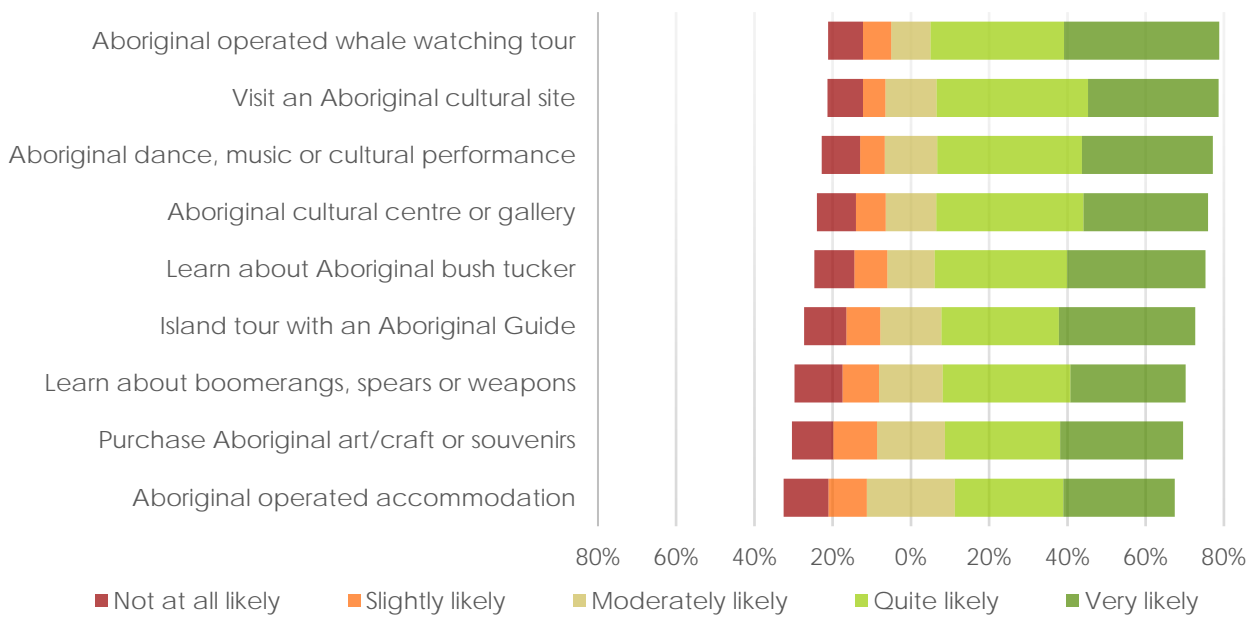


Figure 28. Potential Visitors likelihood of participating in Indigenous experiences

Further insights emerge when comparing the likelihood of potential visitors at different stages of the family lifecycle participating in Indigenous tourism experiences. Table 40 indicates that younger couples, older families (Full Nest III) and older singles are more likely to participate in Indigenous tourism experiences.

Table 40. Likelihood of participating in Indigenous experiences by family lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Aboriginal whale watching tour	3.59	4.11	3.82	3.58	4.20	3.60	3.84
Visit an Aboriginal cultural site	3.80	4.31	3.63	3.66	3.91	3.43	3.95
Aboriginal cultural centre or gallery	3.59	4.19	3.53	3.41	3.57	3.60	3.84
Aboriginal performance	3.55	4.03	3.75	3.53	3.71	3.41	3.84
Learn about Aboriginal bush tucker	3.62	4.09	3.23	3.52	3.88	3.45	3.73
Island tour with an Aboriginal Guide	3.60	3.86	3.22	3.25	4.03	3.45	4.05
Purchase Aboriginal art/craft...	3.37	3.63	3.42	3.37	3.77	3.17	3.54
Learn about boomerangs, spears...	3.39	3.97	3.25	3.42	3.69	3.22	3.45
Aboriginal accommodation	3.38	3.68	3.47	3.39	3.44	3.15	3.31

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

Source: Online Panel

A comparison of low-yield and high-yield potential visitors provides further insight into whether the demand for Indigenous experiences might be. Table 41 shows that high-yield potential visitors are most likely to participate in Indigenous experiences. Together, these results suggest that the key markets are high-yield younger couples, older families (Full Nest III) and older singles.

Table 41. Likelihood of participating in Indigenous experiences by daily spend

	Up to \$135	\$136-\$235	Over \$235
Aboriginal operated whale watching tour	3.63	3.72	3.92
Visit an Aboriginal cultural site	3.61	3.57	3.92
Aboriginal cultural centre or gallery	3.49	3.42	3.91
Aboriginal dance, music or cultural performance	3.59	3.43	3.87
Learn about Aboriginal bush tucker	3.66	3.26	3.80
Island tour with an Aboriginal guide	3.58	3.27	3.76
Purchase Aboriginal art/craft or souvenirs	3.31	3.14	3.70
Learn about boomerangs, spears or other weapons	3.46	3.07	3.67
Aboriginal operated accommodation	3.33	3.19	3.53

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

Source: Online Panel

Interest in Indigenous experiences was also discussed with focus group participants. The non-visitor group indicated that they would not travel to Stradbroke island specifically for Indigenous experiences but once there would be interested in: bushwalks with stories about the Quandamooka people, culture and traditions; options to learn about/see art and craft; information about native land title; opportunities to buy art; opportunities to visit archaeological sites; and guided tours focussing on flora and fauna and the Quandamooka people's connection with the land. The latter would need to focus on island culture and be very different from other Aboriginal tours offered in places like Uluru and Cairns.

Overall, the mixed results in this report suggest that learning about Aboriginal culture is not currently a major reason of visiting the island and Aboriginal culture is not strongly identified with NSI. However, the results in this section suggest there is an appetite for certain types of Indigenous experiences if they are developed in the future. Stakeholders perhaps need to consider marketing strategies to change perceptions about the 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. Some of the dates selected for surveying current visitors coincided with major festivals and events on the island. Despite our efforts to capture the responses of event attendees, the overall pattern of results suggests low participation in major events (Table 42). The markets held regularly at Point Lookout were the most well attended event on the island.

Table 42. Festival and events attendance

	N	Percent
Point Lookout Markets	103	15.9%
Island Vibe	27	4.2%
Quandamooka Festival	24	3.7%
Straddie Assault	12	1.8%
Stradbroke Chamber Music Festival	6	0.9%
Straddie Salute	5	0.8%
Island Elements Festival	5	0.8%
Schoolies or pre-schoolies	4	0.6%
Other: Queen's Baton Relay	8	1.2%
Other	7	1.1%

Source: NSI Visitor Survey

Potential visitors were asked to select events and festivals that would attract them to the island (Table 43). Consistent with findings elsewhere in this report, local markets resonated strongly with potential visitors. There was also strong interest in a seafood festival, music festival, and arts and craft festival. The current Island Vibe Festival is consistent with these results, although its positioning as a Fringe Festival resonates less strongly with the market than positioning the event as a music, arts and crafts festival. NSI 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. There was also some support for an Indigenous festival and a health and wellbeing festival, demonstrating that there are opportunities to further develop the Quandamooka Festival and the Island Elements Festival.

Table 43. Festival and events preferences of potential visitors

	N	Percentage
Local markets	235	57.5%
Seafood festival	169	41.3%
Music festival	137	33.5%
Arts and crafts festival	132	32.3%
Indigenous festival	87	21.3%
Health and wellbeing festival	85	20.8%
Fishing competition	57	13.9%
Fringe festival	53	13.0%
Running, cycling, swimming or triathlon	41	10.0%
Regatta	39	9.5%
Sports tournament	26	6.4%
Other	11	2.7%

Source: Online Panel

Further analysis reveals that the appeal of events and festivals varied across different family lifecycle stages (Table 44). Support for local markets is strongest for families (particularly older families), while interest in a music festival is strongest for earlier lifecycle stages (young singles and couples). Younger couples also show a stronger interest in arts and crafts and health and well-being. Interest in a seafood festival increases in the later stages of the family lifecycle.

Table 44. Festival and events preferences by family lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Local markets	42.6%	62.1%	75.4%	66.7%	83.3%	66.7%	52.3%
Seafood festival	29.8%	55.2%	26.1%	44.4%	66.7%	61.1%	50.0%
Music festival	55.3%	48.3%	40.6%	44.4%	63.3%	17.8%	20.5%
Arts & crafts festival	29.8%	48.3%	27.5%	35.6%	43.3%	38.9%	40.9%
Health & wellbeing festival	25.5%	41.4%	17.4%	28.9%	26.7%	18.9%	20.5%
Indigenous festival	14.9%	20.7%	14.5%	35.6%	26.7%	24.4%	29.5%
Fishing competition	8.5%	20.7%	8.7%	20.0%	40.0%	14.4%	6.8%
Fringe festival	21.3%	10.3%	11.6%	17.8%	20.0%	13.3%	9.1%
Regatta	8.5%	6.9%	5.8%	6.7%	16.7%	14.4%	13.6%
Running, cycling, swimming...	14.9%	20.7%	10.1%	11.1%	13.3%	4.4%	4.5%
Sports tournament	17.0%	10.3%	8.7%	6.7%	3.3%	3.3%	4.5%
Other	4.3%	3.4%	2.9%	0.0%	0.0%	3.3%	6.8%

Source: Online Panel

Higher yield markets are more likely to be attracted by markets, festivals and events that have a focus on seafood or Indigenous culture (Table 45).

Table 45. Festival and events preferences by daily spend

	Up to \$135	\$136-\$235	Over \$235
Local markets	56.7%	66.1%	66.7%
Seafood festival	38.8%	42.0%	52.1%
Music festival	37.3%	36.6%	40.6%
Arts and crafts festival	35.8%	34.8%	38.2%
Health and wellbeing festival	23.9%	24.1%	23.6%
Indigenous festival	19.4%	25.9%	23.6%
Fishing competition	19.4%	16.1%	13.9%
Fringe festival	11.9%	16.1%	14.5%
Running, cycling, swimming or triathlon	6.0%	11.6%	13.3%
Regatta	4.5%	12.5%	10.9%
Sports tournament	4.5%	6.3%	8.5%
Other	3.0%	3.6%	3.0%

Source: Online 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, it must be noted that several visitors also indicated that they would prefer fewer events because they preferred the peace and quiet and were concerned that more events would lead to crowding and congestion.

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 46 provide more detail about the food and dining preferences of current visitors. Many visitors dined at restaurants and cafés (60.9%) or ordered takeaway food (43.6%) from businesses on the island. However, more than 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 46. Food and dining preferences

	N	Percent
Dining in restaurants/cafés	395	60.9%
Groceries bought on mainland	335	51.6%
Groceries bought on island	305	47.0%
Takeaway bought on island	283	43.6%
Dining with friends/relatives on island	107	16.5%
Fish or shellfish collected on island	80	12.3%
Other: Seafood	8	1.2%
Other: Ice Cream	6	0.9%
Other	11	1.7%

Source: NSI Visitor Survey

Potential visitors were not asked about their food and dining preferences. However, Table 47 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 older families to dine at restaurants and cafés but had a strong preference for takeaway food.

Table 47. Food and dining preferences by family lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Dining in restaurants/cafés	60.7%	70.6%	51.9%	73.2%	65.6%	73.9%	71.4%
Groceries bought on mainland	51.3%	52.9%	63.5%	65.4%	65.6%	50.7%	39.3%
Groceries bought on island	36.8%	42.6%	59.6%	59.8%	56.3%	55.1%	50.0%
Takeaway bought on island	36.8%	47.1%	65.4%	55.9%	48.4%	44.9%	35.7%
Friends/relatives on island	14.5%	16.2%	17.3%	21.3%	15.6%	23.2%	25.0%
Fish/shellfish collected on island	9.4%	11.8%	13.5%	15.7%	15.6%	15.9%	10.7%
Other	11.1%	2.9%	1.9%	4.7%	6.3%	2.9%	3.6%

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 48).

Table 48. Food and dining preferences by daily spend

	Up to \$135	\$136-\$235	Over \$235
Dining in restaurants and cafés	60.9%	65.2%	79.9%
Groceries bought on mainland	49.1%	62.3%	66.4%
Groceries bought from shops on island	46.0%	51.4%	62.7%
Takeaway bought on island	39.4%	55.8%	57.5%
Dining with friends/relatives on island	18.6%	11.6%	22.4%
Fish or shellfish collected on island	12.1%	13.0%	17.2%
Other	5.9%	4.3%	4.5%

Source: NSI Visitor Survey

TripAdvisor reviews for restaurants on the island identified a number of issues. The average rating of 3.78/5.00 reported earlier in this report was lower than for other benchmark island destinations, but has shown some recent improvement (see 'Improving the Experience' below). 32% of reviews were negative (ratings between 1 and 3). An analysis of negative reviews revealed several themes that require further attention (Figure 29).



Figure 29. Negative TripAdvisor reviews for food and dining

Many of the reviews expressed disappointment with the freshness and quality of meals (particularly fish and chips and burgers) on the island. Some reviewers also felt that dining was overpriced for the quality they received – indicating a concern about value for money. Several reviewers commented on food being under-cooked or over-cooked. A second major source of dissatisfaction was the perceived lack of service, with reviews complaining about rude staff or long waiting times for tables, service and orders to arrive. Opening and closing times were a third area requiring attention. While these reviews highlight areas for improvement, it must be noted that there were also many positive reviews about dining on the island.

Current visitors provided a number of suggestions for improving food and dining on the island (Figure 30). These suggestions can be grouped under the following key themes:

- More variety, including suggestions for Indigenous food, local foods, seafood, vegetarian, gluten free, fresh/healthy/organic food, pop up cafes and food stalls

- More takeaway options and delivery services to accommodation, including several requests for fast food chains (e.g. McDonalds, KFC, Subway, Hungry Jacks)
- Better grocery stores with competitively priced fresh food so visitors do not need to bring food from mainland
- More family friendly opening hours
- Restaurants and cafés that offer better views



Figure 30. Food and dining improvements

The focus groups revealed that many non-visitors were unaware of the food options on the island. Visitors also explained that they took their own food when camping because they were not aware of grocery and shopping options on the island. An online search for grocery stores on North Stradbroke Island confirmed that information about shops, grocery stores, opening hours, prices and products available on the island is indeed very poor. 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 in much the same way that merchandise has become an important revenue stream for commercial attractions, museums, zoos and theme parks.

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 49 indicates that 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, indicating opportunities to develop these areas further.

Table 49. Shopping and local products

	Current Visitors		Potential Visitors	
	N	Percent	N	Percent
Local food or produce	402	61.9%	309	75.6%
Clothing	101	15.6%	168	41.1%
Arts and crafts	48	7.4%	187	45.7%
Home and garden wares	37	5.7%	123	30.1%
Aboriginal arts and crafts	30	4.6%	151	36.9%
Toys	25	3.9%	64	15.6%
Cosmetics	19	2.9%	51	12.5%
Other: Pharmaceuticals	5	0.8%	-	-
Other	11	1.7%	10	2.4%

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 (Table 50). Younger families (Full Nest I) are interested in purchasing toys while older families (Full Nest III) show a strong interest in arts and crafts.

Table 50. Shopping and local product preferences by family lifecycle

	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Local food/produce	66.7%	81.3%	82.4%	89.8%	81.8%	85.1%	80.0%
Arts and crafts	41.7%	46.9%	55.4%	55.1%	60.6%	41.4%	51.1%
Clothing	47.9%	46.9%	52.7%	40.8%	45.5%	36.8%	37.8%
Aboriginal arts & crafts	33.3%	37.5%	43.2%	38.8%	42.4%	36.8%	44.4%
Home & garden wares	29.2%	31.3%	41.9%	34.7%	45.5%	26.4%	22.2%
Toys	12.5%	15.6%	39.2%	16.3%	12.1%	4.6%	6.7%
Cosmetics	16.7%	21.9%	20.3%	10.2%	12.1%	8.0%	4.4%
Other	4.2%	0.0%	1.4%	2.0%	3.0%	4.6%	2.2%

Source: Online 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 51).

Table 51. Shopping and local product preferences by daily spend

	Up to \$135	\$136-\$235	Over \$235
Local food or produce	73.2%	87.0%	79.9%
Arts and crafts	45.1%	41.7%	56.3%
Clothing	31.0%	43.5%	48.9%
Aboriginal arts and crafts	31.0%	29.6%	48.9%
Home and garden wares	31.0%	27.0%	36.8%
Toys	15.5%	13.9%	19.5%
Cosmetics	11.3%	11.3%	16.7%
Other	5.6%	3.5%	1.1%

Source: Online 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 suggest that the areas that require the most improvement include transport, food and cafés and public amenities such as toilets. Additional 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. On the other hand, the ratings for accommodation show little improvement, highlighting the need to strengthen this aspect. While there is a need for further improvement, the ratings trend for restaurants is promising and highlights that the issues identified elsewhere in this report may have more to do with the variety of dining options than the quality of existing dining experiences.

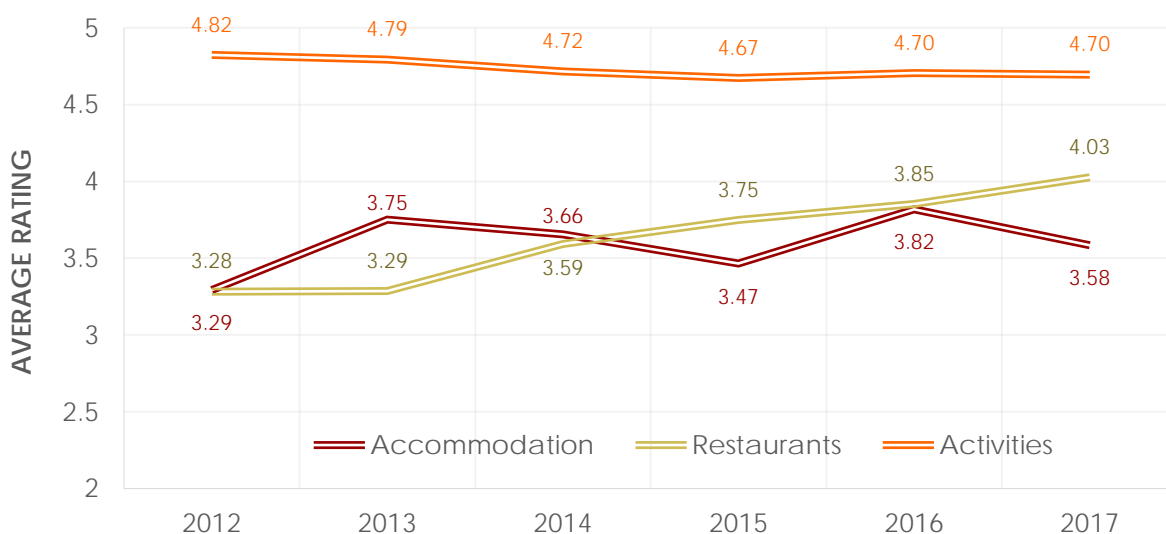


Figure 32. TripAdvisor rating trends

The Online Panel survey 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 was to reduce the cost of visiting NSI, for example:

- Make the cost of the ferry over cheaper
- I think the car ferry is expensive, so perhaps more people might visit if that cost was reduced.
- Cheaper accommodation and cafes
- Make it more affordable to normal people

The second area of improvement was accessibility, for example:

- More public transport to the island
- Barges from other parts of Brisbane
- Easier access to ferries
- Difficult with transport from airport to island particularly for mature people
- Too complicated to travel, no direct flight

The third area of improvement included suggestions for better visitor information, for example:

- Perhaps a little more publicity would create more awareness
- More information about accommodation.
- If I knew more about what was there, I may consider it
- Better marketing, more awareness/advertising would give me more interest.
- More publicity about what it's like, what's on offer there etc.

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Appendices

NORTH STRADBROKE ISLAND VISITOR RESEARCH PROGRAM



This survey seeks your views about North Stradbroke Island (Minjerrabah) 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 2017

SECTION 1: THE ISLAND

1. What **information sources** did you use to plan your trip **before** and **during** your visit to *North Stradbroke Island*? (Tick all that apply)

BEFORE DURING

- Official Stradbroke Island website - stradbrokeisland.com
- 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)
- Online travel agents (e.g. Expedia, Booking.com, etc.)
- Other websites – please tell us which website you used most:
- Mobile apps – please tell us which apps you used most:
- Email newsletters
- Travel agent
- Visitor information centre
- Motoring club (e.g. RACQ, NRMA)
- Newspapers or magazines
- Television or radio
- Brochures or visitor guides
- Signage on the island
- National parks brochures or signage
- Family or friends
- Local businesses or residents
- Other

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

3. 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.)

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

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

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

SECTION 2: YOUR VISIT

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

- | | |
|---|--|
| <input type="radio"/> Attending an event | <input type="radio"/> Watching or competing in sport |
| <input type="radio"/> Attending a wedding | <input type="radio"/> Education or school/university group |
| <input type="radio"/> Holiday/leisure | <input type="radio"/> Research |
| <input type="radio"/> Visiting friends or relatives | <input type="radio"/> Other |
| <input type="radio"/> Work, business or meeting with colleagues | |

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

- | | |
|--------------------------------------|---|
| <input type="radio"/> Water taxi | <input type="radio"/> Own vehicle (e.g. car, motorcycle, campervan) |
| <input type="radio"/> Car ferry | <input type="radio"/> Rental vehicle |
| <input type="radio"/> Private vessel | <input type="radio"/> Taxi or ride share (e.g. Uber) |
| <input type="radio"/> Train | <input type="radio"/> Bicycle |
| <input type="radio"/> Bus | <input type="radio"/> Other |

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

- | | |
|---|-----------------------------------|
| <input type="radio"/> Bus | <input type="radio"/> Bicycle |
| <input type="radio"/> Own vehicle (e.g. car, motorcycle, campervan) | <input type="radio"/> Taxi |
| <input type="radio"/> Rental vehicle | <input type="radio"/> Walking |
| <input type="radio"/> Local resident's vehicle | <input type="radio"/> 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)

- | | |
|--|--|
| <input type="radio"/> Tent or camping | <input type="radio"/> Holiday rental |
| <input type="radio"/> Caravan park | <input type="radio"/> Apartment |
| <input type="radio"/> Cabin | <input type="radio"/> Boat or yacht |
| <input type="radio"/> Own property | <input type="radio"/> Bed and breakfast or guest house |
| <input type="radio"/> Backpacker accommodation | <input type="radio"/> Visiting friends or relatives |
| <input type="radio"/> Hotel or resort | <input type="radio"/> 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)

- | | |
|---|---|
| <input type="radio"/> Point Lookout | <input type="radio"/> Blue Lake |
| <input type="radio"/> Amity Point | <input type="radio"/> Brown Lake |
| <input type="radio"/> Dunwich | <input type="radio"/> North Stradbroke Island Historical Museum |
| <input type="radio"/> North Gorge Walk | <input type="radio"/> Myora Springs Conservation Area |
| <input type="radio"/> Cylinder Beach | <input type="radio"/> Naree Budjong Djara National Park |
| <input type="radio"/> Frenchman's Beach | <input type="radio"/> Other |

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

- | | |
|---|---|
| <input type="radio"/> Spotting wildlife on the island | <input type="radio"/> Water sports (e.g. swimming, kayaking, surfing) |
| <input type="radio"/> Watching whales, dolphins and turtles | <input type="radio"/> Land-based sports (e.g. tennis, golf, jogging, cycling, football) |
| <input type="radio"/> Bird watching | <input type="radio"/> Visiting museums and art galleries |
| <input type="radio"/> Snorkelling or diving | <input type="radio"/> Four-wheel-driving |
| <input type="radio"/> Bush walking | <input type="radio"/> Markets |
| <input type="radio"/> Camping | <input type="radio"/> Fishing and boating |
| <input type="radio"/> Attending an event or festival | <input type="radio"/> Massage and spa treatments |
| <input type="radio"/> Shopping | <input type="radio"/> Organised tour |
| <input type="radio"/> Learning about Aboriginal culture | <input type="radio"/> 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stay in Aboriginal owned or operated accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit an Aboriginal cultural centre or gallery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
See an Aboriginal dance, music or cultural performance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit an Aboriginal cultural site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase locally produced Aboriginal art/craft or souvenirs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learn about or try Aboriginal bush tucker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learn about boomerangs, spears or other weapons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Go on an Aboriginal owned or operated whale watching tour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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.....

.....

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

- | | |
|---|--|
| <input type="radio"/> Point Lookout Markets | <input type="radio"/> Island Vibe |
| <input type="radio"/> Straddie Assault | <input type="radio"/> Island Elements Festival |
| <input type="radio"/> Straddie Salute | <input type="radio"/> Schoolies or pre-schoolies |
| <input type="radio"/> Stradbroke Chamber Music Festival | <input type="radio"/> Other |
| <input type="radio"/> Quandamooka Festival | |

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

.....

.....

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

- | | |
|---|---|
| <input type="radio"/> Groceries bought on the mainland | <input type="radio"/> Dining with friends or relatives from the island |
| <input type="radio"/> Groceries bought from shops on the island | <input type="radio"/> Fish or shellfish I caught or collected on the island |
| <input type="radio"/> Dining in restaurants and cafés | <input type="radio"/> Other |
| <input type="radio"/> Takeaway bought on the island | |

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

.....

.....

22. 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
- Cosmetics
- Other

23. 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

24. Was *North Stradbroke Island* the **only destination** you visited on this trip?

- Yes → Skip to Question 27
- No

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

- Brisbane
- Gold Coast
- Sunshine Coast
- Other

26. Was *North Stradbroke Island* the **primary reason** for this trip?

- Yes
- No

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. 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	\$
Accommodation	\$
Entry fees, activities and tours	\$

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

1.
2.

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

1.
2.

32. 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would like to visit the island again	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would buy products from the island if they were available at home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would like to order island products online for delivery to my home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island is one of Australia's best kept secrets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island is one of Australia's best island destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island is one of Australia's best nature-based destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island is one of Australia's best beach destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island is one of Australia's best wildlife destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island is rich in Aboriginal culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island offers unique experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The island offers many attractions and activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, I am very satisfied with my visit to the island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION 3: ABOUT YOU

33. What is your gender?

- Female
- Male
- Prefer not to say

34. In what year were you born?

35. Are you of Aboriginal or Torres Strait Islander origin?

- Yes
- No

36. Are you a member of the Quandamooka people?

- Yes
- No

37. Where do you usually live?

- Australia. Please provide your postcode:
- Overseas. Please tell us which country:

.....

38. Do you have children either living in or outside of your household?

- No → Skip to Question 40
- Yes

39. 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

40. 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

41. 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:

42. 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

43. 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

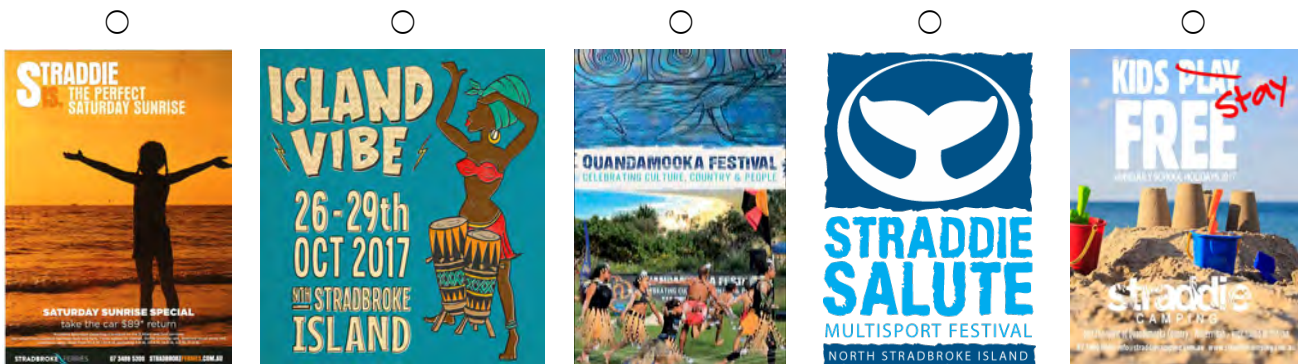
44. Would you visit North Stradbroke Island again?

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

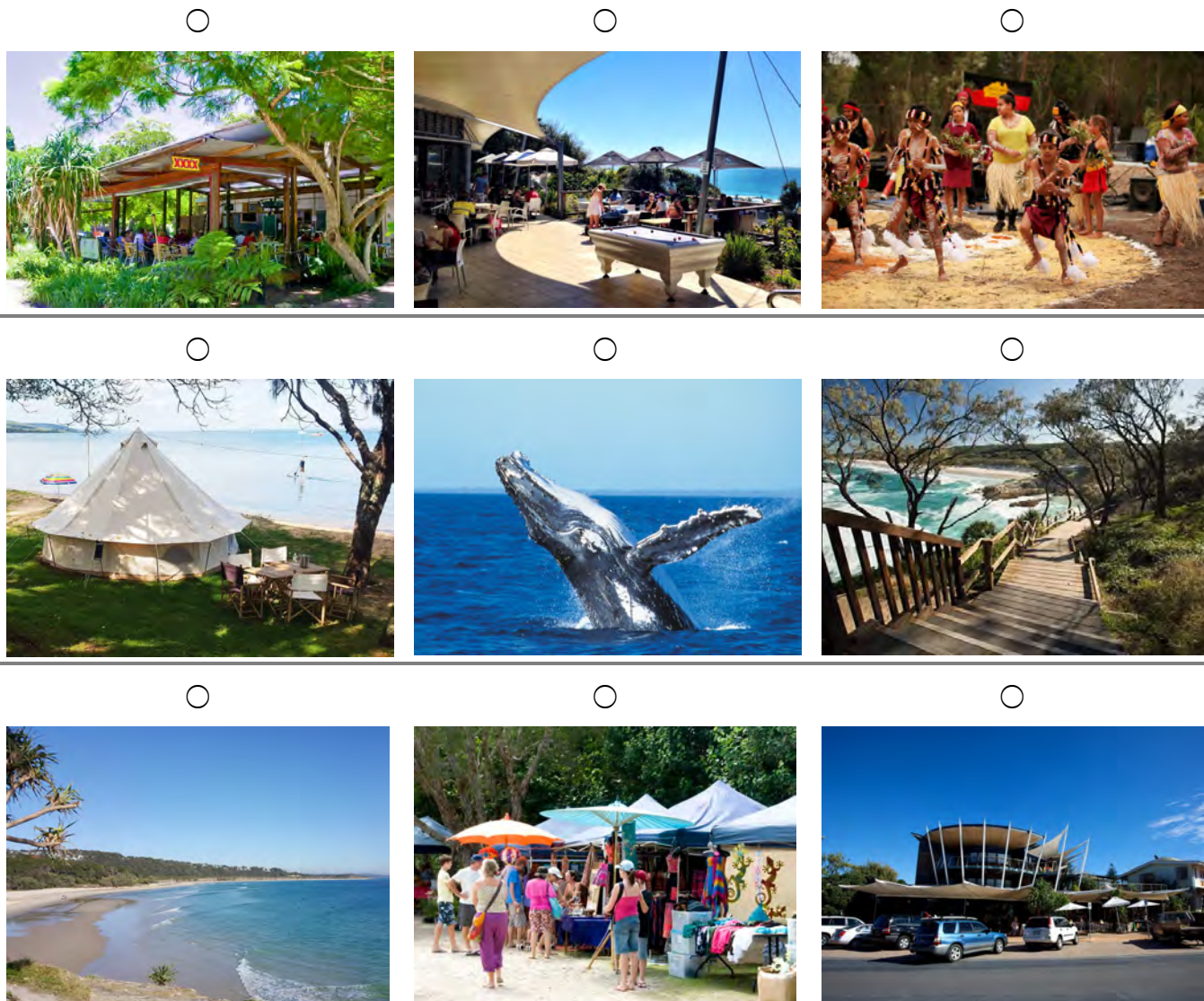
SECTION 2: DESTINATION AWARENESS

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 in the last 12 months? (Select all that apply)



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)

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

- | | |
|--|--|
| <input type="radio"/> Tent or camping | <input type="radio"/> Holiday rental |
| <input type="radio"/> Caravan park | <input type="radio"/> Apartment |
| <input type="radio"/> Cabin | <input type="radio"/> Boat or yacht |
| <input type="radio"/> Own property | <input type="radio"/> Bed and breakfast or guest house |
| <input type="radio"/> Backpacker accommodation | <input type="radio"/> Visiting friends or relatives |
| <input type="radio"/> Hotel or resort | <input type="radio"/> Other |

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

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

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

- | | |
|--|---|
| <input type="radio"/> Indigenous festival | <input type="radio"/> Regatta |
| <input type="radio"/> Fringe festival | <input type="radio"/> Health and wellbeing festival |
| <input type="radio"/> Arts and crafts festival | <input type="radio"/> Local markets |
| <input type="radio"/> Music festival | <input type="radio"/> Running, cycling, swimming or triathlon |
| <input type="radio"/> Seafood festival | <input type="radio"/> Sports tournament |
| <input type="radio"/> Fishing competition | <input type="radio"/> 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)

- | | |
|--|-----------------------------------|
| <input type="radio"/> Local food or produce | <input type="radio"/> Clothing |
| <input type="radio"/> Arts and crafts | <input type="radio"/> Toys |
| <input type="radio"/> Aboriginal arts and crafts | <input type="radio"/> Cosmetics |
| <input type="radio"/> Home and garden wares | <input type="radio"/> 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gold Coast	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Whitsunday Islands	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Great Barrier Reef	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Byron Bay	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rainbow Beach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Magnetic Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fraser Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moreton Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kangaroo Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
North Stradbroke Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bribie Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lord Howe Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hawaii	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fiji	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vanuatu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bali	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New Caledonia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION 3: ABOUT YOU

19. What is your gender?

- Female
- Male
- Prefer not to say

20. In what year were you born?

21. Are you of Aboriginal or Torres Strait Islander origin?

- Yes
- No

22. Are you a member of the Quandamooka people?

- Yes
- No

23. Do you have children either living in or outside of your household?

- No → Skip to Question 25
- Yes

24. 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

25. 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

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. 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

28. 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

29. Where do you usually live?

- Australia. Please provide your postcode:
- Overseas. Please tell us which country:

