



# Penguin Island Visitor Survey 2024



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Information current at February 2024.

### **Executive Summary**

- In order to inform ongoing management of Penguin Island and associated tourism experiences, visitors were surveyed with the aim to better understand the motivations, behaviours and experience of visitors to Penguin Island and determine the importance of seeing wild penguins.
- Surveys took place from December 2023 to January 2024 and during the April 2024 school holidays.
- Penguin Island received an estimated 49,200 visitors during 2023-2024.
- There were a total of 637 valid responses to the survey.

#### **Penguin Island visitors**

- Respondents were mostly aged 25-54 (63.4%), travelling with family (46.9%) and travelling with children (58.4%). The average group size was 4.6 people. There was a relatively high proportion (65.6%) of female respondents which is typical of wildlife viewing experiences.
- Just over half (55.2%) were from Western Australia, of whom most (52.8%) were from the Perth Metro area. Just over a quarter (26.1%) of respondents were from overseas, about a third (37.8%) of which were from the United Kingdom.
- About half (50.6%) were from the Perth Metro area on a day trip with 11.9% of overseas respondents on a holiday visiting friends and relatives.
- Most respondents travelled to Penguin Island by ferry (81.5%).
- In addition, most respondents were first time visitors (63.5%), with the majority spending
  up to half a day on the island (4 hours or less) (89.4%).
- Respondents mostly first found out about Penguin Island through local knowledge (35.8%) or word of mouth/friend (35.1%).



Heading down to the beach on south-east of island. Photo – Danielle Godwin

### **Executive Summary**



People with kayaks at eastern beach. Photo - Danielle Godwin

#### **Importance and Satisfaction**

- Respondents were satisfied with their visit to Penguin Island with an average overall
  satisfaction of 84.3% and half (52.0%) would actively promote Penguin Island to others.
  The proportion of respondents who would not recommend Penguin Island to others
  (17.5%) has significantly increased since the previous study.
- Those that saw penguins reported significantly higher satisfaction and were significantly more likely to recommend Penguin Island to others than those who did not see penguins.
- Respondents rated most environmental and experience aspects of their visit as very important, and they were highly satisfied with the majority of those aspects.
- The most important environmental aspects were condition of the environment (80.9%) and seeing penguins in their natural habitat (75.2%). Expectations were significantly exceeded for all environmental factors except seeing penguins in their natural habitat. This highlights the necessity of appropriately communicating the likelihood of observing little penguins to set more realistic expectations. Expectations were exceeded the most for seeing other birds and seeing pelicans.
- The most important experience aspect was exploring the island via the boardwalks (80.6%). Expectations were exceeded for all experience aspects with presence of rangers and staff having the largest positive gap value between expectation and satisfaction.

#### Importance of seeing penguins and seeking penguins

- About a third (31.3%) of respondents reported it was extremely important to see penguins during their visit, before arriving at the island, but this significantly reduced to 19.9% after spending some time on the island.
- Almost half (45.2%) reported that the opportunity to see penguins was one of several reasons to visit the Island.
- 98.1% reported they did not leave the boardwalk to look for penguins.
- 52.6% looked for penguins in multiple locations with under the boardwalks the most common response (65.7%) followed by in the vegetation (47.9%). About a fifth of respondents (17.9%) reported they did not look for penguins during their visit.

### **Executive Summary**

#### Activities, purpose of visit and locations visited

- The most popular activities were walking (80.1%), viewing other wildlife (71.7%) and relaxing/fun/enjoyment (63.2%).
- The main purposes for respondents' visits were to see penguins (59.7%), to observe wildlife (44.6%) and to enjoy nature and the outdoors (43.7%).
- The main locations visited were the grassed picnic area (zone 4; 86%), the toilet block and boardwalk to the generator shed (zone 6; 80.6%) and the southern beach and boardwalk (zone 2; 78.7%).

#### **Future Management**

 Respondents were largely supportive of hypothetical future management actions, being more supportive of limiting access (82.0%) compared to capping times on the island (68.8%).

#### **Unexpected natural aspects**

 The wildlife of the island was the most mentioned unexpected aspect (114 mentions), particularly birds (58 mentions) and specifically pelicans (23 mentions). King's skinks (37 mentions) and the island's natural environment (24 mentions) were also highlighted as unexpected natural aspects.

#### Other comments

- Around 40% of respondents provided additional comments. Topics most mentioned were penguins, a general positive experience, staff, and the Discovery Centre.
- Comments about penguins largely related to disappointment in not seeing any or many and not being informed of low likelihood of seeing penguins before trip.
- Comments about the Discovery Centre were largely disappointment in the centre being removed.



Looking south towards steps on southern beach. Photo – Danielle Godwin

# Key insights

### 1. Visitor experience shift

While viewing penguins remains a key driver for visiting Penguin Island, respondents indicated that viewing wildlife, enjoying nature and the outdoors, and spending time with family and friends were also amongst the main purposes for visiting the island. These results show visitors are engaging more with other experiences on the island, compared to the previous study.

### 2. Visitor expectations need to be managed

Visitors still place high importance and expectations on seeing penguins and were disappointed if they did not see them. This was reflected in significantly lower satisfaction ratings with Penguin Island compared to the previous study, and a reduced likelihood of recommending the island to others. Noting that word of mouth is a key source of information for visiting the island, a decrease in those that would actively tell others about the island (promotors) and increase in those that may speak less favourably about visiting the island (detractors), may influence future visitation. All stakeholders need to collaborate to ensure communication and messaging around the presence and likelihood of seeing penguins is clear to better manage visitor expectations.

### 3. Diversity of experience should be promoted

Visitors still considered the condition of the environment and seeing wildlife as important, with expectations for seeing other birds and seeing pelicans greatly exceeded. Many respondents also mentioned other wildlife, such as King's skinks, and the natural environment, such as limestone caves, as unexpected natural aspects. This suggests the status of the island as a nature reserve, and other nature experiences should be promoted to encourage visitation for the diversity of experiences possible on the island.



Great Crested Tern (*Thalasseus bergii*) on jetty at Penguin Island. *Photo – Tourism WA* 

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People and kayaks on eastern beach. Photo – Danielle Godwin

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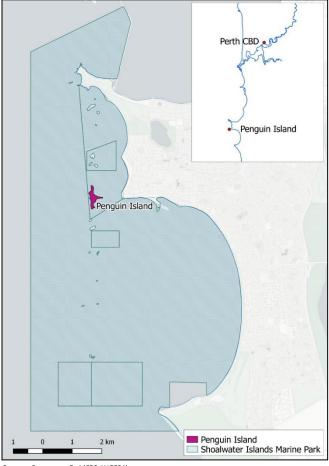
# **Background**

Penguin Island is situated 700 metres offshore from Rockingham, in the Shoalwater Islands Marine Park. At 12.5 hectares, the island is home to an array of wildlife and migratory seabirds. Penguin Island attracts many visitors from Australia and overseas, with the resident little penguin (*Eudyptula minor*) colony a key drawcard.

Previously, the Penguin Island Discovery Centre on the island allowed visitors the opportunity to view little penguins up close and learn about both them and the wider marine park. The centre had reached its end-of-life and was closed at the end of the 2022-2023 season (May 2023) with the structure removed in February/March 2024.

Along with the removal of the Discovery Centre structure, other development works were undertaken on the island during the same period, including installation of new boardwalks and interpretive signage. The works period impacted visitors' ability to move around the island as the boardwalks and area around the Discovery Centre were closed, including the grassed picnic area.

At the closure of the Discovery Centre in 2023, the tour operator, Perth Wildlife Encounters, was granted permission to conduct walking tours on the island, guiding visitors around the island via the boardwalks and providing educational talks about the island and the wider marine park.



Source: Basemap – Esri (CRS: WGS84);

Shoalwater Islands Marine Park - DBCA (CRS: GDA94)

# Background

In August 2022, the WA Minister for Environment announced additional management measures to protect the little penguin colony on Penguin Island, including closing the island when forecasted temperatures exceed 35 degrees Celsius, the winter closure period extending (after the June long weekend to October) to accommodate more of the breeding season, and increased management and monitoring both on the island and in the surrounding Shoalwater Islands Marine Park.

Tourism activity related to Penguin Island is an important part of the local economy, and includes the ferry to the island, glass-bottom boat tours and kayak-based tours around the Shoalwater Islands Marine Park, including the island. As such, the recently implemented island closures and removal of the Penguin Island Discovery Centre present a unique challenge for business operators and visitors alike.

This study follows a similar study conducted in 2023, prior to the closure of the Discovery Centre (see <u>Penguin Island Visitor Survey Report</u> 2023). This project surveyed visitors to the island through 2024, once the Discovery Centre had closed.

There have also been several other visitor surveys undertaken on Penguin Island (1996-1997, 2001-2002, 2007-2008, 2013-2014).



Looking north along eastern beach on Penguin Island. Photo – Danielle Godwin

# Methodology

- Visitors were approached and asked to participate in a voluntary survey on the island in December 2023 (27<sup>th</sup>), January 2024 (3<sup>rd</sup> 24<sup>th</sup>) and again in the first three weeks of April, including the two weeks of school holidays (2<sup>nd</sup> 19<sup>th</sup> April).
- Little penguins (Eudyptula minor) were present in December through to January 22<sup>nd</sup>, during their moult and could be viewed under boardwalks.
- Due to initial issues with internet connectivity on the island, a combination of tablet and paper surveys were used. Respondents self-completed the surveys. Visitors to the grassed picnic area were approached and asked if they would like to participate in the survey. Only visitors who had been on the island for more than 1 hour were approached.
- Responses were graphed and compared to produce descriptive statistics and graphs / tables.
- Results of this study have also been compared with those of the study conducted in 2022-2023.
- A total of 637 valid responses were received to the survey in 2024.
- Statistical tests were used to compare visitors' experience depending on whether they saw penguins or not, and to compare results to the
  previous study conducted in 2022-2023. Statistical tests used included t-tests, two-sample proportions tests and ordinal and logistic
  regression.



Looking towards boardwalk steps on southern beach. Photo - Danielle Godwin

# Penguin Island visitation

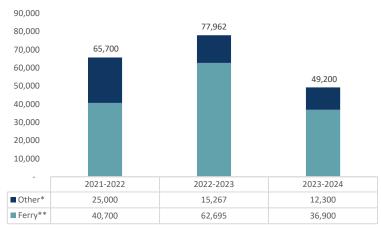


Total estimated visitation in 2023-2024 was 49,200.



Overall visitation is down 36.9% compared to 2022-2023 and 25.1% compared to 2021-2022.

### **Visitation to Penguin Island**



<sup>\*</sup>Other includes estimates of sandbar crosses and watercraft visitation



Boardwalk looking towards toilet block.

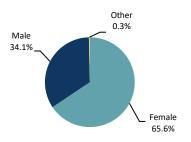
Photo – Danielle Godwin

A visit is defined as a "measurement unit involving a person going onto lands and waters of a park or protected area for the purposes mandated for the area. Each visitor who enters a park for a purpose mandated for the area creates a visit statistic. Typically, the visit statistic has no length of stay data associated with it. (Hornback, K.E. and Eagles, P.F.J. (1999) Guidelines for Public Use Measurement and Reporting at Parks and Protected Areas. World Commission on Protected Areas (WCPA), IUCN, Gland, Switzerland and Cambridge, UK).

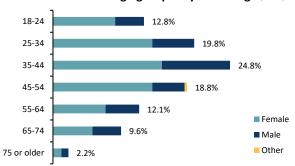
<sup>\*\*</sup>Ferry numbers are commercial-in-confidence - not for external distribution

### Respondent profile

### What is your gender? (n=599)



### To which age group do you belong? (n=596)





A relatively high proportion (65.6%) of respondents were female, which is typical of wildlife viewing experiences.



Almost two thirds of respondents (63.4%) were aged between 25-54.

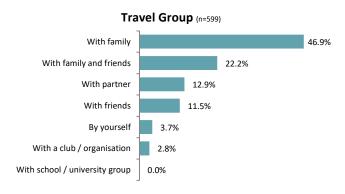


Both male and female respondents had one distinct peak in the 35-44 age bracket.

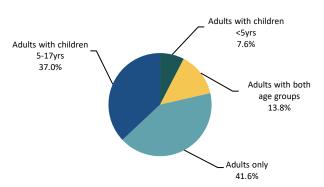


Groups gathering on the lawn at Penguin Island. Photo - Danielle Godwin

### Respondent profile



### Groups travelling with children (n=574)





The most common travel groups were with family (46.9%) and family and friends (22.2%), both of which have significantly increased since the previous study\*.



12.9% of respondents travelled with partner. This is a significant decrease since previous study (20.9%)\*.



**41.6%** were groups of only adults, while **58.4%** of visitors were travelling with children.



**4.6** people per group on average. The largest group size was 44, smallest group size was 1. Seven groups had more than 20 people.



People walking along the eastern beach at Penguin Island. Photo - Danielle Godwin

### Respondent profile

### Usual place of residence (n=598)

Origin	Percentage of total	Percentage (total)
Western Australia		55.2%
Perth Metro	52.8%	
South West	1.0%	
Wheatbelt	0.8%	
Pilbara	0.3%	
Goldfields	0.2%	
Interstate		18.7%
New South Wales	8.2%	
Queensland	4.5%	
Victoria	3.8%	
South Australia	1.0%	
Tasmania	0.5%	
Australian Capital Territory	0.3%	
Northern Territory	0.3%	
Overseas		26.1%



50.6% of respondents were Perth residents on a day trip. Most of the respondents who usually live overseas were either on holiday from elsewhere (10.8%) or on holiday visiting friends or relatives (11.9%).

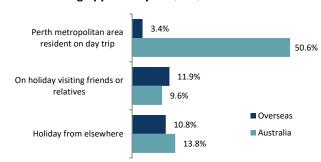


**55.2%** were from **Western Australia**, with 52.8% of those visitors from the **Perth Metro area**. Just over a quarter of respondents usually live **overseas**, of which about a third came from the **United Kingdom**.



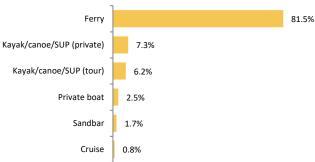
Compared to the previous study, there has been a significant increase in interstate visitors, and a significant decrease in overseas visitors\*.

### Thinking about your visit today, which of the following applies to you? (n=595)



# Trip profile





**81.5%** of respondents travelled to Penguin Island using the **ferry**.

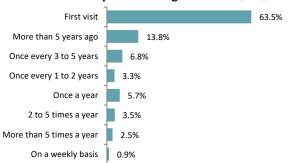


**63.5%** of respondents were visiting the island for the first time.

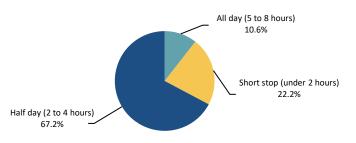


89.4% of respondents were spending half a day or less on the island (2 to 4 hours).

#### How often do you visit Penguin Island? (n=636)

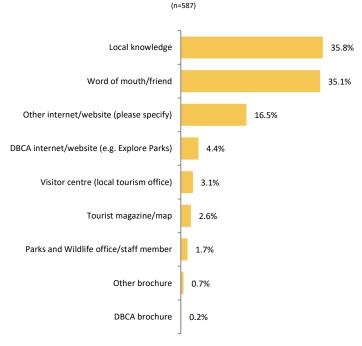


#### Length of stay (n=635)



# Trip profile – Sources of information

### How did you first find out about Penguin Island





**35.8%** of respondents first heard of Penguin Island through local knowledge, followed by word of mouth/friend (35.1%). Local knowledge was highest amongst Western Australian respondents (30%).



Private boat anchored at Penguin Island. Photo - Danielle Godwin

### Satisfaction

- Overall average satisfaction with the visit to Penguin Island was 84.3%. This is significantly lower compared to the previous study (89.6%)\*.
- Visitors who saw penguins reported significantly higher satisfaction and were significantly more likely to promote Penguin Island, compared to those who did not see penguins\*.
- Overall satisfaction with Shoalwater Islands
  Marine Park was 85.9%.



Visitors on walking tour. Photo - Amanda Smith

- 52.0% of respondents would promote
  Penguin Island to others. This is significantly
  lower compared to the previous study
  (67.9%)\*.
- The proportion of respondents who would not recommend Penguin Island to others (17.5%) or are passive (30.5%) has significantly increased since the previous study\*.

### Proportion of respondents who would recommend Penguin Island to others



<sup>\*</sup>Significance tested using independent t-test and ordinal regression

### Importance of seeing penguins

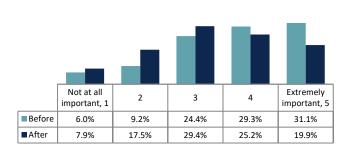


The importance visitors placed on seeing a penguin before their arrival significantly reduced after having spent some time on the island\*.

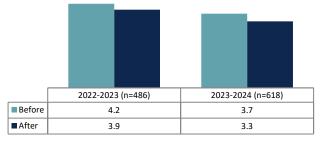


The importance of seeing penguins, both prior to and after spending some time on the island, has significantly decreased compared to the previous study\*.

How important was it to see penguins during your visit (before arriving/after some time on the island) (n=618)



Average visitor rating of importance of seeing a penguin before/after visit; 2022-2023 and 2023-2024



### Importance of seeing penguins

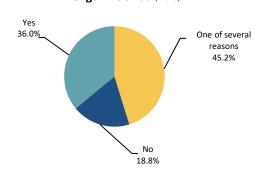


**45.2%** of respondents reported that the opportunity to see little penguins in their natural habitat was **one** of several reasons they visited the island.



There was a statistically significant increase in respondents wanting to see penguins in their natural habitat as their reason for visiting (36.0%), compared to the previous study (28.6%) and a significant decrease in visitors reporting their reason for visiting was not to see penguins in their natural habitat (18.8%) compared to the previous study (30.1%)\*.

# Was the opportunity to view penguins in their natural habitat the reason you visited Penguin Island? (n=628)





Visitors on eastern beach at Penguin Island. Photo – Danielle Godwin

### Seeing and seeking penguins



**52.6%** of respondents looked for penguins in multiple locations. Looking under boardwalks was the most common (65.7%) and in the ocean the least common (32.3%).

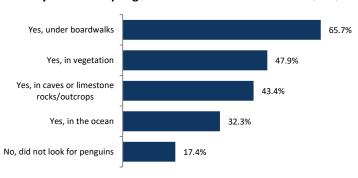


There was a significant increase in people looking for penguins under boardwalks compared to the previous study (45.5%)\*.



Those that saw penguins were significantly more likely to look for them under boardwalks\*. These penguins were also pointed out by guides on walking tours during the moult.

#### Did you look for penguins in their natural habitat?\*\* (n=620)





Penguin nest box in vegetation. Photo - Danielle Godwin

<sup>\*</sup>Significance tested using logistic regression

<sup>\*\*</sup>Respondents could select multiple responses

# Seeing and seeking penguins



12 respondents reported they did enter the vegetation to look for penguins, an increase from the previous study (9). Responses for this suggested a desire to find the penguins in their natural habitat. 7 were first time visitors from outside of WA.



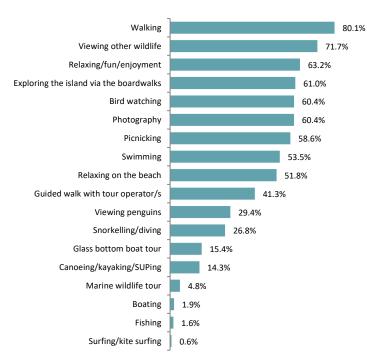
98.1% of respondents reported they did not enter the vegetation to look for penguins.



Looking north-west from southern lookout. Photo – Danielle Godwin

### Activities and purpose

# What activities did you participate in during your most recent visit to Penguin Island?\* (n=623)





Walking was the most commonly reported activity (80.1%) followed by viewing other wildlife (71.7%) and relaxing/fun/enjoyment (63.2%).



Visitors going on guided tours, swimming, snorkelling and relaxing on beach have significantly increased, whereas visitors viewing penguins and going on glass bottom boat tours has significantly decreased\*\*.



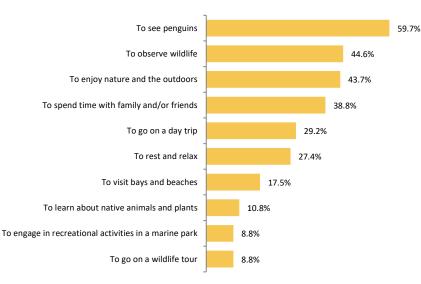
Visitors on the southern lookout. Photo - Danielle Godwin

<sup>\*</sup>Respondents could select multiple responses

<sup>\*\*</sup>Significance tested with two-sample proportions test

### Activities and purpose

### What were the THREE MAIN purposes of your trip?\* (n=623)





To see penguins as a main purpose of a trip has significantly reduced since the previous study, while visiting bays and beaches, spending time with family and/or friends and going on wildlife tours has significantly increased since the previous study\*\*.



To see penguins was the most popular purpose for respondents' trip (59.7%), followed by to observe wildlife (44.6%).



Other wildlife such as pelicans and King's skinks were amongst the most commonly reported unexpected natural aspect of their visit (see p. 28).



King's skink on grassed area at Penguin Island. Photo - Danielle Godwin

<sup>\*</sup>Respondents could select up to three responses

<sup>\*\*</sup>Significance tested using two-sample proportions test

# Where visitors go on Penguin Island



Respondents reported **zone 4** (grassed picnic area) as the **most commonly visited**, with zones 6 and 2 the next most frequently visited.



Visitors largely explored the entire island, however areas closer to the ferry/mainland appeared to be more popular.

Note: Part of zone 3 was closed for construction works during sampling and visitors were directed along the beach at zone 5 to access zone 4.

#### Zones visited while on Penguin Island\* (n=609)

Zone	Description	Total
1	Southern boardwalk	75.5%
2	Southern beach and boardwalk	78.7%
3	Boardwalk from pumphouse to research quarters	72.4%
4	Grassed picnic area	86.0%
5	Northern beach and immediate shoreline	76.4%
6	Toilet block to generator shed	80.6%
7	Northern boardwalk	73.6%
8	Back beach	70.0%

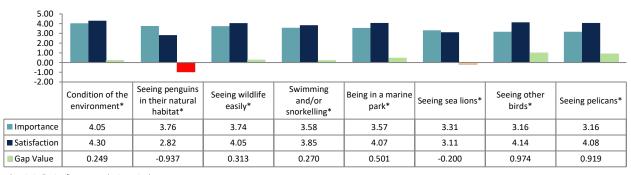
<sup>\*</sup>Respondents could select multiple zones



Source: Basemap - Bing Maps (CRS: WGS84); Penguin Island Zones - Alexis Krapez / Danielle Godwin (CRS: GDA94)

### Importance and Satisfaction – Environment

#### Importance and satisfaction gap values for environmental aspects of visit to Penguin Island

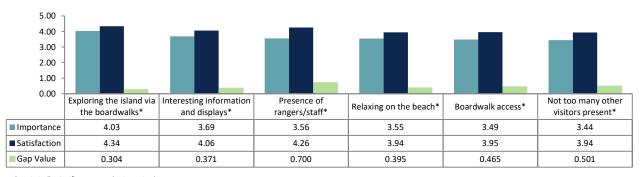


<sup>\*</sup>statistically significant; tested using paired t tests

- Respondents were asked to rate both the importance and satisfaction for eight aspects relating to environmental features of their visit to Penguin Island, from 1 to a total score of 5. People were asked how important the aspect was to them, how satisfied they were with it, and the difference between the two answers was calculated (the gap value). Negative gap values indicate that visitor expectations were not met; the larger the gap, the lower that aspect's performance.
- The negative gap value for seeing penguins in their natural habitat (gap value -0.937) and seeing sea lions (gap value -0.200) were both found to be statistically significant, meaning overall satisfaction with these aspects were lower than the importance visitors placed on them. Therefore, expectations were not met. In addition, when visitors didn't see penguins, they also reported a statistically significant negative gap value with seeing sea lions.
- All other environmental aspects had statistically significant positive gap values indicating that expectations are being exceeded. The largest
  positive gap value was for seeing other birds (gap value 0.974) followed by seeing pelicans (gap value 0.919). This aligns with respondent
  comments (see *Unexpected natural aspects* p.28).
- Highest mean importance score was for condition of the environment (80.9%; 4.05), lowest mean importance score was for seeing other birds and seeing pelicans (63.2%; 3.16).
- Highest mean satisfaction was also for condition of the environment (85.9%; 4.30), lowest mean satisfaction score was for seeing penguins in their natural habitat (56.4%; 2.82)

### Importance and Satisfaction – Experience

#### Importance and satisfaction gap values for experience aspects of visit to Penguin Island

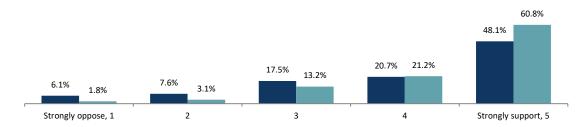


 $<sup>^{*}</sup>$ statistically significant; tested using paired t tests

- Respondents were asked to rate both the importance and satisfaction for six aspects relating to their experience at Penguin Island, from 1 to a total score of 5. People were asked how important the aspect was to them, how satisfied they were with it, and the difference between the two answers was calculated (the gap value). Negative gap values indicate that visitor expectations were not met; the larger the gap, the lower that aspect's performance.
- There were no negative gap values for aspects relating to experience, meaning that people's satisfaction exceeded the importance they placed on a that aspect. This indicates that management action is not recommended.
- All aspects had statistically significant positive gap values indicating that expectations relating to visitor experience are being exceeded. The
  largest positive gap value was for presence of rangers/staff (gap value 0.700) followed by not too many other visitors present (gap value 0.501).
- Highest mean importance score was for exploring the island via the boardwalks (80.6%; 4.03), lowest mean importance score was for not too
  many other visitors present (68.8%; 3.44). The high ranking of importance and satisfaction for boardwalks highlights their importance to the
  visitor experience.
- Highest mean satisfaction was also for exploring the island via the boardwalks (86.7%; 4.34), and lowest mean satisfaction score was also for not too many other visitors present (78.8%; 3.94).

# Hypothetical future management

In the future we may need to consider other management actions to further protect penguins, how supportive would you be of the following?



- Capped time on the island (e.g. up to 4 hours) (n=622)
- Limited access to certain areas (e.g. bird nesting sites, areas penguins shelter) (n=623)



Respondents were largely supportive of hypothetical future management actions, but more supportive of limiting access (82.0%) compared to capping times on the island (68.8%).



**84.0%** of respondents were supportive of either hypothetical future management action.



Area isolated from public entry to protect penguins. Photo - Danielle Godwin

### Unexpected natural aspects

Were there any natural aspects that you observed that you weren't expecting to see before you arrived?\*



**141 (27.8%)** respondents provided a comment regarding unexpected natural aspects.



Wildlife was the most mentioned unexpected natural aspect of Penguin Island (114 mentions), particularly birds (58 mentions). Specific birds mentioned included:

- Pelicans (23)
- Terns (3)
- Seagulls (3)
- Cormorants (1)



Other than birds, other wildlife that was mentioned included King's skinks (37 mentions), dolphins (12 mentions) and sea lions (8 mentions).



The natural environment was also mentioned as unexpected (24 mentions), particularly the limestone caves and rock formations (8 mentions). Other aspects of the natural environment mentioned included:

- Petrified/fossilised trees (3)
- Spiders (2)
- Seagrass (2)

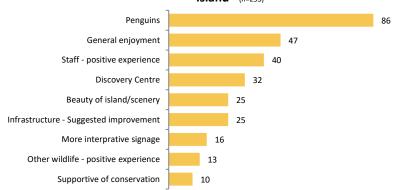


Limestone caves on eastern beach. Photo - Danielle Godwin

### Other comments

- Of the 637 respondents to the survey, 40.8% (253) chose to provide comment. A single comment could mention multiple topics.
- The topic most mentioned was **penguins** (86 mentions), with comments largely relating to expectations (see p.30).
- The next most mentioned topics related to a general positive experience, the staff, and general comments about the island/scenery. There were 32 comments relating to the Discovery Centre no longer being there (see p.30).
- 10 comments specifically related to support for conservation.

### Topics raised in comments about experience at Penguin Island\* (n=253)



"Love the conservatory efforts of the volunteers and staff here, their passion and their love for the park and wildlife. The place is very well taken care of, thank you for the pleasant experience."

"I think it needs to be better advertised on the website that the chance of seeing a penguin is very small to avoid the disappointment when arriving..."

"It would be nice to know ahead of time that we probably won't see penguins."

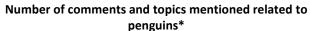
"I was very disappointed that we were not informed that penguins would not be seen during the visit... I think it should be part of information given on the Island website"

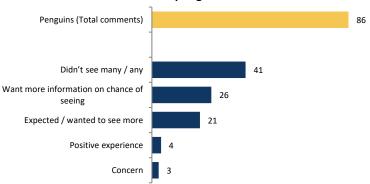
"...we did expect to see some penguins while visiting. Maybe I didn't read the info online well enough but this should be stated more clearly."

"I would prefer a representative from DBCA to complete the guided walking tour..."

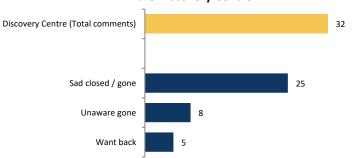
"Had a lovely time. As a disability worker, I loved seeing how accessible everything is for future outinas."

### Other comments – Penguins & Discovery Centre





# Number of comments and topics mentioned related to the Discovery Centre\*



- 102 respondents (16.0% of all respondents) provided comments relating to penguins (86 comments) and/or the Discovery Centre (32 comments).
- Comments relating to penguins largely mentioned that visitors did not see many or any penguins (41 mentions).
- There were 26 mentions suggesting more information on the likelihood of seeing penguins should be made available before booking.
- Comments relating to the Discovery Centre (32) largely mentioned it no longer being there.
- Disappointment in the Discovery Centre being closed was mentioned 25 times.
- There were 8 mentions of being unaware the centre was gone.
- There were 5 mentions of wanting the Discovery Centre back.