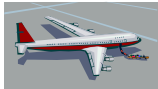


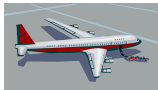
TOURISM
QUARTERLY REPORT #1: AIRPORT EXIT SURVEY
TNQ Region
January – March 2008

This quarterly report forms part of a series of reports presented by the Marine and Tropical Science Research Facility (MTRSF) and James Cook University (JCU) on tourism in Tropical North Queensland (TNQ). The data presented in this report summarises the results from the current quarter of data collection in the TNQ region from January to March 2008. Overall, a total of 432 surveys were returned for this quarter from the Cairns Domestic Airport Terminal. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef and rainforest experiences. This report marks the first barometer which compares the current quarter with the corresponding quarter for last year. This barometer also introduces a number of new questions related to service quality.



1. INTRODUCTION

The MTRSF research Project 4.9.2 Sustainable Nature-based Tourism: Planning & Management aims to identify major issues relating to tourist motivations and behaviours for visiting the Wet Tropics and to identify key trends and drivers of Wet Tropics visitor patterns including economic contribution. Additionally, this study covers visitation to both the Wet Tropics rainforest and the Great Barrier Reef (GBR).

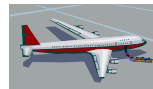


2. METHODOLOGY

The principle methodology for this research was visitor surveys distributed by the MTRSF research team at the Cairns Airport Domestic Terminal departure lounge.

This location hosts domestic and international visitors travelling within Australia and transferring between international and domestic flights, linking Cairns with all of the Australian capital cities, most of the regional centres, Great Barrier Reef islands and Alice Springs/Uluru in Central Australia.

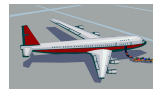
Data was collected on visitors' socio-demographic characteristics, travel patterns, motivations, activities, travel expenditure, alternative destinations considered, and satisfaction.



3. SAMPLE & LIMITATIONS

A total of 432 valid surveys were collected from domestic and international visitors at the Cairns Airport during this survey period.

Japanese visitors were not included in this year's surveys. These visitor markets will be included in subsequent quarters.



4. FINDINGS

Gender and origin of respondents

The sample consisted of 432 respondents of whom 55.9% (55.7% in 2007) were females and 44.1% were males (44.3% in 2007). Figure 1 illustrates that visitors were mainly from Australia (29.9% compared with 35.7% in 2007), the UK & Ireland (26.8%, 29.3% in 2007) and North America (15.8%, 15.6% in 2007).

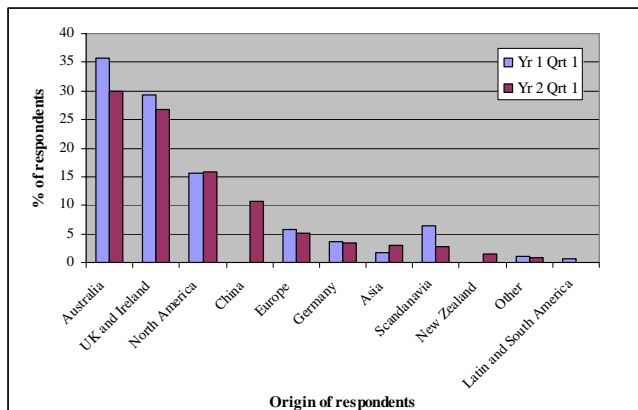


Figure 1: Origin of respondents

Occupation

The most common types of occupation that respondents indicated were:

- Professional (22.4%, 21.7% in 2007);
- Retired/semi-retired (16.6%, 21.4% in 2007);
- Student (13.6%, 12.0% in 2007);
- Management (9.8%, 5.7% in 2007);
- Self-employed (9.3%, 10.0% in 2007) and;
- Office-clerical (7.9%, 4.3% in 2007).

Age of respondents

As shown in Figure 2, the major age groups of respondents were 20-29 years (30.6%, 29.4% in 2007), 50-59 years (16.0%, 13.7% in 2007) and 30-39 years (15.5%, 14.0% in 2007).

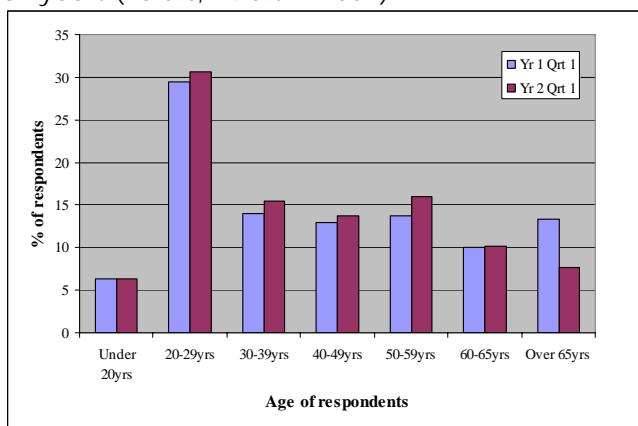


Figure 2: Age of respondents

Travel party

Respondents mainly travelled as a couple (43.8%, 42.5% in 2007), with friends (19.5%, 16.4% in 2007), alone (11.3%, 23.4% in 2007), as a family with children (8.2%, 4.3% in 2007) or with relatives

(8.2%, 7.0% in 2007), as part of a tour group (7.5%, 6.4% in 2007) or club (1.4%, 0% in 2007).

Previous visits and length of stay

74.5% of respondents said this was their first visit to Tropical North Queensland. Only 44.9% of domestic visitors were first timers, while 87.2% of international visitors were first time visitors to the region.

Overall, only 25.5% of respondents were repeat visitors (29.8% in 2007). Over 90% of repeat visitors had visited 1-3 times before.

The overall average length of stay in the region was 6.47 nights, compared with 8.42 nights in 2007.

Accommodation and transportation

Table 1 below outlines the main types of accommodation used by respondents.

Table 1: Accommodation used by respondents

| | Qrt 1 Yr 2 (%) | Qrt 1 Yr 1 (%) |
|-----------------------|-------------------|-------------------|
| Hotels/Motels | 38.2 | 38.0 |
| Holiday apartments | 19.6 | 13.4 |
| Resorts | 18.2 | 16.1 |
| Backpacker hostels | 15.2 | 19.5 |
| Friends and relatives | 4.7 | 9.2 |
| Caravan park/cabins | 3.3 | 2.1 |
| Camping | 0.7 | 1.0 |
| B&B | 0.2 | 0.7 |

Table 2 below illustrates the popularity of the different types of transport used by respondents to travel to and around the region while holidaying.

Table 2: Transport used by respondents

| | Qrt 1 Yr 2 (%) | Qrt 1 Yr 1 (%) |
|------------------|-------------------|-------------------|
| Air | 58.5 | 56.7 |
| Rented car | 16.5 | 11.7 |
| Bus/coach | 14.8 | 19.1 |
| Private vehicle | 3.9 | 8.7 |
| Rented campervan | 3.0 | 1.0 |
| Other | 2.1 | 1.3 |
| Cruise boat | 0.9 | 1.0 |
| Rail | 0.2 | 0.3 |

Information

Table 3 outlines the most common sources of information used by visitors.

Table 3: Information sources used by respondents

| | Qrt 1 Yr 2 (%) | Qrt 1 Yr 1 (%) |
|---------------------|-------------------|-------------------|
| Friends and family | 49.2 | 44.5 |
| Internet | 34.2 | 26.8 |
| Tourist guide books | 30.8 | 36.1 |
| Travel agents | 25.4 | 18.1 |
| Been before | 18.5 | 20.7 |
| TV documentaries | 8.5 | 7.0 |
| Visitor centres | 5.6 | 4.3 |
| Ads print | 3.3 | 4.0 |
| Ads on the TV/radio | 1.8 | 2.3 |
| Other | 4.4 | 5.4 |

Motivations

The mean (measured on a scale of 1 = not at all important, to 5 = very important) for the most important motivations for visiting the region are listed in Table 1.

Overall, the top five motives for Qrt 1 2008 were the same as in Qrt 1 2007. These were:

- Visit the GBR (4.53, 4.40 in 2007);
- Visit the rainforest (4.01, 3.95 in 2007);
- See Australian wildlife (3.98, 3.77 in 2007);
- Rest & relax (3.98, 3.90 in 2007) and;
- Experience natural environment (3.94, 3.86 in 2007).

As shown in Table 4, domestic and international visitors had quite different mean rankings for the major motives for visiting the region.

Domestic visitors were mainly motivated by resting and relaxing (4.48) and visiting the GBR (4.04). While international visitors were also most motivated by visiting the Great Barrier Reef (4.69), they were also very motivated by seeing Australian wildlife (4.18).

Table 4: Motivations for travelling to the region

| Motivations | Mean | | |
|----------------------|---------|------|-------|
| | Overall | Dom | Int'l |
| Visit the GBR | 4.53 | 4.04 | 4.69 |
| Visit the rainforest | 4.01 | 3.81 | 4.08 |

| | | | |
|------------------------------------|------|------|------|
| See Australian wildlife | 3.98 | 3.38 | 4.18 |
| Rest & relax | 3.98 | 4.48 | 3.76 |
| Experience the natural environment | 3.94 | 3.83 | 4.00 |
| Snorkelling & diving | 3.91 | 3.67 | 4.02 |
| Walk in the rainforest | 3.66 | 3.56 | 3.71 |
| Visit a World Heritage area | 3.59 | 3.44 | 3.68 |
| Climate | 3.57 | 3.80 | 3.50 |
| Visit beaches | 3.49 | 3.45 | 3.50 |

Last holiday and alternative destinations

The most popular (single) destinations given in response to "where did you spend your last holiday?" were the United States of America (3.6%), New Zealand (3.0%), Thailand (2.9%), Spain (2.8%), Sydney (2.8%), France (2.3%), Europe (1.8%), Italy (1.81%), Gold Coast (1.6%) and Tasmania (1.4%).

Respondents were also asked to list up to 3 alternative destinations considered for this trip. The most popular alternative destinations considered when planning this trip included Fiji (8.1%), United States of America (5.7%), Europe (3.3%), New Zealand (15.6%), Sydney (12.0%), Melbourne (10.0%) and Brisbane (3.6%).

Visits to the rainforest

Overall, the majority of respondents, 77.6%, visited the Wet Tropics rainforest during their holiday in TNQ this quarter, compared with 74.7% of respondents in the same quarter in 2007.

Respondents who said they had visited the rainforests during their holiday, were asked to indicate which locations they had visited, indicated in Figure 3.

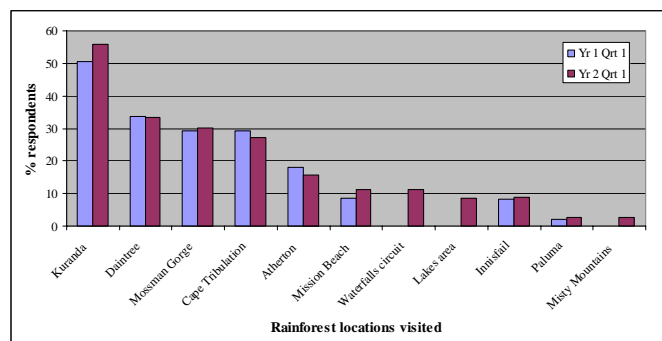


Figure 3: Rainforest Locations Visited

Respondents who had not visited the rainforest during their holiday (22.4% of respondents) mainly said there was 'not enough time' (21.4%).

Rainforest activities

Walking and viewing rainforest scenery were the most popular rainforest activities to visitors (see Table 5).

Table 5: Interest in rainforest activities

| Rainforest activities | % | | |
|------------------------------|---------|------|-------|
| | Overall | Dom | Int'l |
| Walking | 65.6 | 62.2 | 67.8 |
| Viewing scenery | 59.8 | 52.0 | 63.8 |
| Viewing wildlife | 50.1 | 40.2 | 55.6 |
| Swimming | 44.4 | 42.5 | 46.1 |
| General relaxation | 42.5 | 47.2 | 41.0 |
| Film/Photography | 42.5 | 32.3 | 48.0 |
| Guided tour | 36.7 | 26.8 | 41.8 |
| Visiting information centres | 29.3 | 20.5 | 34.2 |
| Socialisation | 19.5 | 21.3 | 18.4 |
| Reading site interpretation | 19.4 | 14.2 | 22.4 |
| Bird watching | 17.6 | 13.4 | 20.2 |
| Hiking | 16.1 | 15.7 | 16.7 |
| 4WD | 10.1 | 11.0 | 9.9 |
| Rafting | 6.4 | 4.7 | 7.4 |
| Camping | 5.8 | 3.1 | 7.3 |
| Bike riding | 3.1 | 3.1 | 3.1 |

Visits to the GBR

87.1% of respondents visited the GBR on their trip to the region, compared with only 72.5% of respondents during the same quarter in 2007. Figure 4 shows the departures sites used to travel to the GBR in Qrt 1 of both 2008 and 2007.

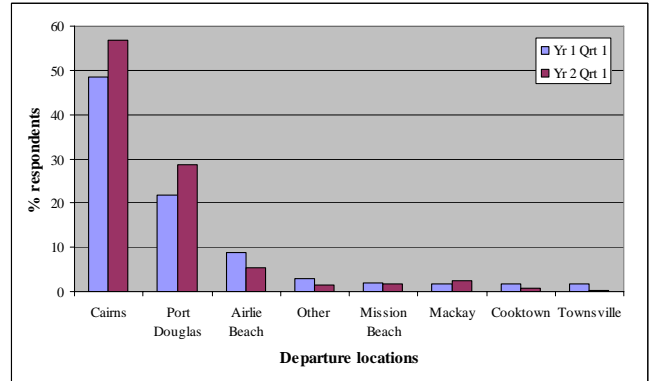


Figure 4: Departure locations for reef trips

Respondents who had not visited the GBR during their holiday (only 12.9% of respondents) gave the following reasons – 'no time' (12.6%), 'been before' (5.1%) and 'no money' (4.1%).

Reef activities

Snorkelling and swimming were the most popular rainforest activities to visitors (see Table 6).

Table 6: Interest in reef activities

| Reef activities | % | | |
|---------------------------------|---------|------|-------|
| | Overall | Dom | Int'l |
| Snorkelling | 65.9 | 45.7 | 75.6 |
| Swimming | 54.5 | 43.3 | 59.9 |
| Glass bottom boat/semi-sub | 36.8 | 22.8 | 43.9 |
| Viewing marine animals | 36.1 | 26.8 | 40.7 |
| Visiting the islands | 23.1 | 13.4 | 27.5 |
| Sailing | 13.1 | 4.7 | 17.2 |
| Certified scuba diving | 13.0 | 10.2 | 14.0 |
| Resort/uncertified scuba diving | 11.0 | 5.5 | 14.0 |
| Diver training course | 8.9 | 4.7 | 10.8 |
| Helicopter flight | 8.0 | 3.9 | 10.1 |
| Overnight cruise | 7.8 | 5.5 | 8.8 |
| Marine biologist tour | 6.6 | 6.3 | 7.0 |

Service quality

Respondents were asked to reflect on their level of satisfaction with a number of aspects of their visit to the region, on a scale of 1 (not at all satisfactory) to 5 (very satisfactory). Table 7 shows the results of these.

Table 7: Satisfaction with service quality

| Service quality aspects | Mean | | |
|----------------------------------|---------|------|-------|
| | Overall | Dom | Int'l |
| Friendly accommodation staff | 4.11 | 3.92 | 4.20 |
| Accomm – value for money | 3.98 | 4.05 | 3.95 |
| Accomm service standard | 3.88 | 3.82 | 3.91 |
| Tour guides were informative | 4.09 | 3.89 | 4.16 |
| Tours – value for money | 3.81 | 3.65 | 3.88 |
| Tour service standards | 3.95 | 3.76 | 4.03 |
| Tours were on-time | 4.15 | 3.89 | 4.26 |
| Attractions – value for money | 3.81 | 3.59 | 3.90 |
| Restaurant staff were efficient | 3.68 | 3.69 | 3.67 |
| Restaurant – value for money | 3.39 | 3.40 | 3.39 |
| Restaurant menu selections | 3.51 | 3.48 | 3.52 |
| Shopping was good | 3.36 | 3.29 | 3.39 |
| Variety of shopping | 3.26 | 3.11 | 3.33 |
| Shop closing times | 3.21 | 3.24 | 3.20 |
| Public transport was accessible | 3.38 | 3.30 | 3.40 |
| On-time public transport | 3.41 | 3.23 | 3.46 |
| Visitor information was accurate | 3.78 | 3.66 | 3.81 |
| Visitor info was accessible | 3.89 | 3.76 | 3.93 |
| Felt safe/secure moving around | 4.17 | 4.01 | 4.22 |

Locations driven through in region

Figure 5 compares the main locations that respondents who used private/rented vehicles to drive in the region drove through in Qrt 1 in 2007 and 2008.

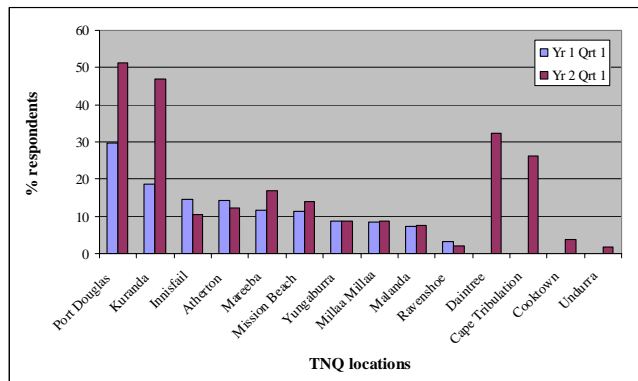


Figure 5: Locations travelled to by respondents

Table 8 illustrates the locations travelled to in TNQ in Qrt 1 2008 by respondents, and in particular the places travelled to by domestic and international visitors.

Table 8: Locations in TNQ travelled to by respondents

| Locations | % | | |
|------------------|---------|------|-------|
| | Overall | Dom | Int'l |
| Port Douglas | 51.2 | 60.6 | 47.1 |
| Kuranda | 46.8 | 46.5 | 47.8 |
| Daintree | 32.3 | 37.0 | 30.5 |
| Cape Tribulation | 26.1 | 27.6 | 26.1 |
| Mareeba | 16.9 | 22.8 | 14.1 |
| Mission Beach | 14.1 | 11.0 | 15.6 |
| Atherton | 12.1 | 16.5 | 10.2 |
| Innisfail | 10.5 | 11.0 | 10.2 |
| Yungaburra | 8.8 | 10.2 | 8.3 |
| Millaa Millaa | 8.7 | 9.4 | 8.6 |
| Malanda | 7.5 | 9.4 | 6.7 |
| Cooktown | 3.9 | 2.4 | 4.7 |
| Ravenshoe | 2.1 | 3.1 | 1.6 |
| Undurra | 1.8 | 1.6 | 2.0 |

Satisfaction levels

Respondents were highly satisfied with their overall visit to the region.

On a scale where 1 = very unsatisfactory and 10 = very satisfactory, the mean value was 8.40, compared with a mean value of 8.49 in Qrt 1, 2007. For international visitors the overall mean was 8.48, and for domestics was 8.19.

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