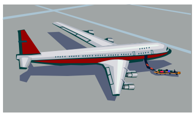
Reef & Rainforest RESEARCH CENTRE

JAMES COOK UNIVERSITY AUSTRALIA

Australian Government
Department of the Environment, Water, Heritage and the Arts

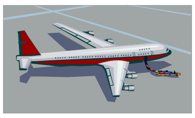
TOURISM
QUARTERLY REPORT # 3: AIRPORT EXIT SURVEY
TNQ Region
July – September 2008

This quarterly report forms part of a series of reports presented by the Marine and Tropical Sciences Research Facility (MTSRF) and James Cook University (JCU) on tourism in Tropical North Queensland (TNQ). The data presented in this report summarise the results from the **third quarter** (Q3) of data collection in the TNQ region from **July to September 2008**. Overall, a total of **295 surveys** were returned for this quarter from the international and domestic terminals of Cairns Airport. Results include socio-demographic characteristics, travel behaviour, alternative destinations considered, motivations and planning, and reef and rainforest experiences. This report marks the third 'tourism barometer' to compare the current quarter with the corresponding quarter for 2007. This barometer also outlines responses to a new survey question related to service quality in North Queensland.



1. INTRODUCTION

MTSRF research *Project 4.9.2 Sustainable Nature-based Tourism: Planning and 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 the Great Barrier Reef (GBR).

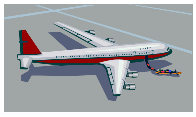


2. METHODOLOGY

The data outlined in this report was obtained from visitor surveys distributed by the MTSRF research team at the Cairns Airport – both the International and Domestic Terminal departure lounges.

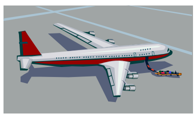
Cairns Airport hosts domestic and international visitors travelling within Australia and transferring between international and domestic flights, linking Cairns with all of the Australian capital cities, most of the regional centres in the TNQ region, Great Barrier Reef islands and Alice Springs/Uluru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

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



3. SAMPLE AND LIMITATIONS

A total of 295 valid surveys were collected from domestic and international visitors at the Cairns Airport during this survey period. The survey was distributed in both English and Chinese.



4. FINDINGS

Gender and origin of respondents

The sample consisted of 295 respondents (397 in 2007) of whom 55.7% (56.9% in 2007) were females and 44.3% were males (43.1% in 2007). Figure 1 illustrates that visitors were mainly from Australia (46.5%) (47.3% in 2007), the UK and Ireland (16.7%) (16.7% in 2007) and North America (12.4%) (11.4% in 2007).

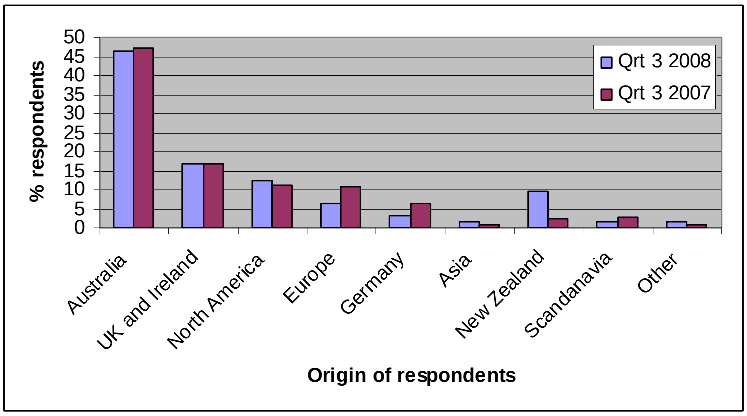


Figure 1: Origin of respondents, Q3 2007-2008.

Occupation

The most common types of occupations that respondents indicated were:

- **Professional** (29.6%) (23.4% in 2007);
- **Student** (20.4%) (16.0% in 2007);
- **Self-employed** (8.6%) (9.9% in 2007);
- **Retired/semi-retired** (7.9%) (18.5% in 2007);
- **Management** (7.1%) (7.6% in 2007); and
- **Public service** (7.1%) (2.5% in 2007).

Age of Respondents

As shown in Figure 2, the major age groups of respondents were 20-29 years (29.3%) (16.4% in 2007), 50-59 years (15.9%) (15.4% in 2007) and to a lesser extent 40-49 years (15.5%) (12.1% in 2007).

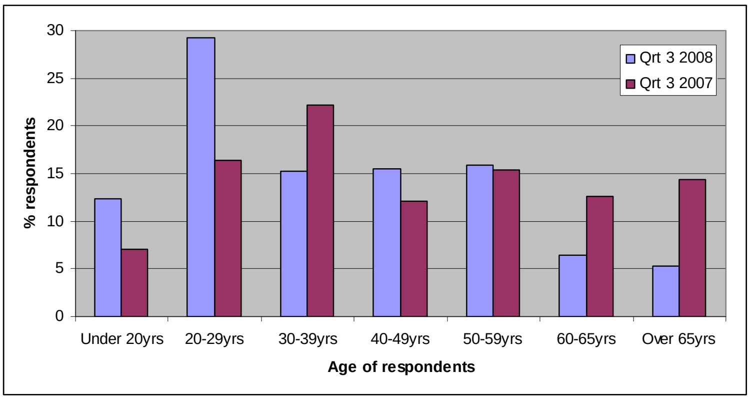


Figure 2: Age of respondents, Q3 2007-2008.

Travel Party

Respondents mainly travelled as a couple (34.7%) (42.9% in 2007), with friends (14.2%) (12.4% in 2007), alone (15.7%) (17.7% in 2007), as a family with children (16.8%) (13.6% in 2007) or with relatives (7.7%) (10.1% in 2007), as part of a tour group (10.9%) (1.8% in 2007) or club (0.0%) (1.5% in 2007).

Previous visits and length of stay

Just over sixty percent (61.5%) of respondents said this was their first visit to Tropical North Queensland (61.5% in 2007). Only 31.5% of domestic visitors were 'first-timers', while 68.5% of international visitors were first-time visitors to the region.

Overall, only 38.5% of all respondents were repeat visitors (38.5% in 2007). Over 90% of repeat visitors had visited between one and three times before.

The overall average length of stay in the region was 7.92 nights, compared with 7.87 nights in Q3 2007.

Accommodation and transport

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

Table 1: Accommodation used by respondents, Q3 2007-2008 (%).

Type	Q3 2008	Q3 2007
Hotels / motels	24.2	35.4
Holiday apartments	20.3	16.5
Resorts	18.9	14.0
Backpackers'	21.7	16.8
Friends / family	8.2	11.7
Caravan park / cabins	3.9	2.8
Camping	2.8	1.8
Bed 'n' breakfast	0.0	1.0

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

Table 2: Modes of transport used by respondents, Q3 2007-2008 (%).

Type	Q3 2008	Q3 2007
Air	51.4	50.9
Rented car	17.7	20.4
Bus / coach	16.3	14.5
Private vehicle	7.4	6.1
Rented van	2.5	3.1
Other	3.9	1.0
Cruise boat	0.0	2.0
Rail	0.4	2.0

Information sources

The most popular sources of information used by visitors are outlined in Table 3 below.

Table 3: Information sources used by respondents, Q3 2007-2008 (%).

Type	Q3 2008	Q3 2007
Friends / family	39.9	43.6
Internet / WWW	30.0	29.0
Guide books	21.2	29.7
Travel agents	18.4	19.6
Have been before	25.8	23.7
TV documentaries	6.0	7.6
Visitor centres	3.2	4.8
Ads in print	3.5	3.3
Ads on television / radio	2.1	3.3
Other	6.7	7.3

Motivations to travel to the region

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 Q3 2008 were similar to those in Q3 2007:

- **Climate** (4.17) (3.83 in 2007);
- **Rest and relaxation** (4.15) (3.96 in 2007);
- **To visit the GBR** (4.12) (4.13 in 2007);
- **Experience natural environment** (3.90) (3.93 in 2007) and;
- **To visit the rainforest** (3.78) (3.95 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 rest and relaxation (4.31) and the climate (4.23), while international visitors were most motivated by opportunities to visit the Great Barrier Reef (4.44), Wet Tropics rainforests (3.85) and experiencing the natural environment (4.01).

Table 4: Respondents' motivations for traveling to the region, Q3 2008.

Motivation	Mean (Scale 1 to 5)		
	Overall	Domest.	Intern.
Climate	4.17	**4.23**	4.13
Rest and relaxation	4.15	**4.31**	4.06
Visit the GBR	4.12	3.72	**4.44**
Experience the natural environment	3.90	3.80	**4.01**
Visit the rainforests	3.78	3.72	**3.85**
Visit the beaches	3.76	3.63	**3.85**
See Australian wildlife	3.69	3.16	**4.10**
Snorkelling and diving	3.66	3.32	**3.90**
Walk in the rainforest	3.59	3.55	**3.66**
The price matched my budget	3.44	**3.45**	3.42

Previous 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 (4.7%), Thailand (4.1%), Gold Coast (4.1%), New Zealand (3.7%), Spain (3.4%), United Kingdom (3.1%), Italy (2.7%) Canada (2.0%), Europe (2.0%) and France (2.0%).

Respondents were also asked to list up to three alternative destinations considered for this trip. The most popular alternative destinations considered when planning this trip included New Zealand (6.8%), Fiji (4.1%), Melbourne (3.7%), Sydney (3.1%), Tasmania (3.1%) and Thailand (3.1%).

Visits to the Wet Tropics rainforests

Overall, the majority of respondents, 69.0%, visited the Wet Tropics rainforest during their holiday in TNQ this quarter, compared with 76.8% 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.

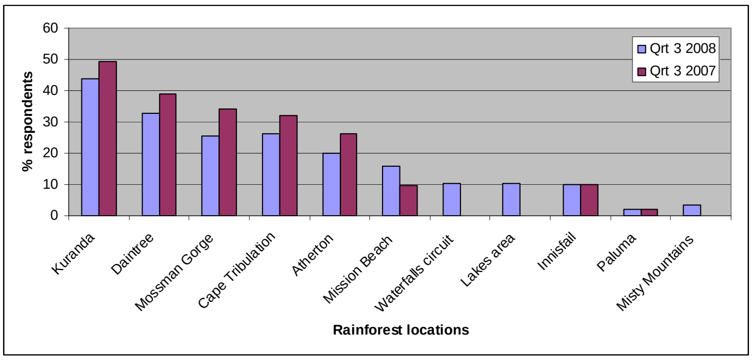


Figure 3: Rainforest locations visited, Q3 2007-2008.

Respondents who had not visited the rainforest during their holiday (31.0% of respondents) mainly indicated there was ‘not enough time to do so’ (19.4%).

Rainforest activities

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

Table 5: Respondents’ interest in rainforest activities, Q3 2008.

Activity	Percentage		
	Overall	Domest.	Intern.
Walking	57.8	56.2	59.2
Viewing scenery	48.0	47.7	48.3
Viewing wildlife	41.8	35.2	47.6
Swimming	29.5	25.8	32.7
General rest and relaxation	40.0	40.6	39.5
Filming / photography	32.4	30.5	34.0
Guided tour	29.5	23.4	34.7
Visiting information centres	21.8	22.7	21.1
Socialising	18.5	18.8	18.4
Reading site interpretation	11.6	12.5	10.9

Activity	Percentage		
	Overall	Domest.	Intern.
Bird watching	13.1	11.7	14.3
Hiking	19.3	20.3	18.4
Four-wheel driving	8.4	7.0	9.5
Rafting	9.5	6.2	12.2
Camping	4.4	6.2	2.7
Bike riding	8.7	7.0	10.2

Visits to the Great Barrier Reef

Just under seventy percent (67.3%) of respondents visited the GBR on their trip to the region, compared with 68.4% of respondents during the same quarter in 2007. Figure 4 shows the departure sites used to travel to the GBR in Q3 in 2008 and 2007.

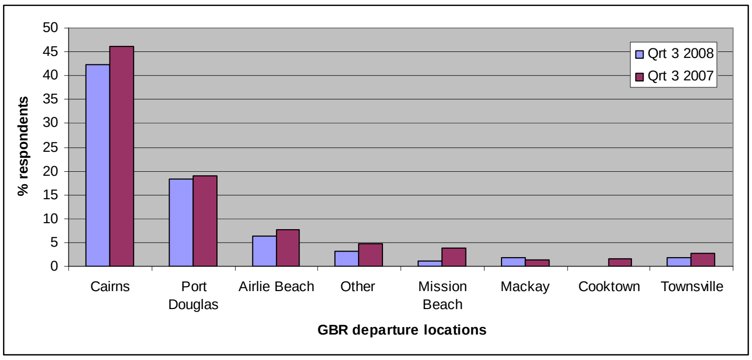


Figure 4: Departure locations for reef trips, Q3 2007-2008.

Respondents who had not visited the GBR during their holiday (32.7% of respondents) gave the following reasons – ‘have been before’ (13.4%), ‘no time to do so’ (11.3%) and ‘could not afford it’ (6.0%).

Reef activities

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

Table 6: Respondents’ interest in reef activities, Q3 2008.

Activity	Percentage		
	Overall	Domest.	Intern.
Snorkelling	54.5	41.4	66.0
Swimming	41.5	32.8	49.0
Glass-bottomed boat / semi-submersible tours	26.5	18.0	34.0
Viewing marine animals	25.5	20.3	29.9

Activity	Percentage		
	Overall	Domest.	Intern.
Visiting reef islands	15.6	10.9	19.7
Sailing	13.5	7.8	18.4
Certified SCUBA diving	10.5	9.4	11.6
Resort / uncertifed SCUBA diving	7.6	3.9	10.9
Diver training course	5.8	0.8	10.2
Helicopter flight	3.3	4.7	2.0
Overnight cruise	2.9	1.6	4.1
Marine biologist's tour	8.0	7.0	8.8

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).

Table 7: Respondents' satisfaction with service quality, Q3 2008.

Aspect	Mean		
	Overall	Domes.	Intern.
Accommodation – friendly staff	4.13	4.07	4.18
Accommodation – value for money	3.67	3.64	3.71
Accommodation – service standard	3.74	3.77	3.72
Tours – guides were informative	4.07	3.95	4.16
Tours – value for money	3.81	3.68	3.91
Tours – service standard	3.97	3.82	4.08
Tours – were on time	4.08	3.98	4.16
Attractions – value for money	3.80	3.66	3.91
Restaurants – staff were efficient	3.72	3.72	3.72
Restaurants – value for money	3.45	3.47	3.43
Restaurants – menu selections	3.65	3.73	3.58
Shopping – was enjoyable	3.45	3.40	3.49
Shopping – good variety	3.43	3.36	3.48
Shopping – closing times	3.42	3.34	3.49
Public transport – was accessible	3.38	3.33	3.43
Public transport – was on time	3.35	3.33	3.37

Aspect	Mean		
	Overall	Domes.	Intern.
Visitor information – was accurate	3.82	3.82	3.81
Visitor information – was accessible	3.85	3.80	3.89
Safety – felt safe / secure moving around	4.17	4.19	4.16

Locations driven through within the region

Figure 5 compares the main locations that respondents drove through in Q3 2008 and 2007.

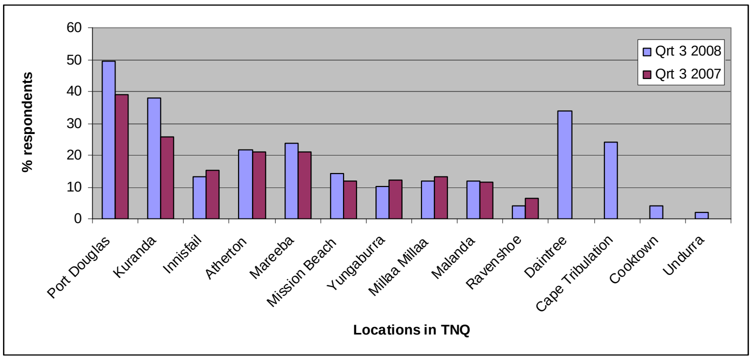


Figure 5: Locations travelled to by respondents with private/rented vehicles, Q3 2007-2008.

Table 8 illustrates the locations in TNQ visited in Q3 2008 by domestic and international respondents.

Table 8: Locations traveled to in the TNQ region, Q3 2008.

Location	Percentage		
	Overall	Domes.	Intern.
Port Douglas	50.5	56.2	45.6
Kuranda	37.8	41.4	34.7
Daintree	34.2	36.7	32.0
Cape Tribulation	24.4	23.4	25.2
Mareeba	23.3	30.5	17.0
Mission Beach	14.5	18.0	11.6
Atherton	22.2	30.5	15.0
Innisfail	13.1	17.2	9.5
Yungaburra	10.5	11.7	9.5
Millaa Millaa	12.0	18.0	6.8
Malanda	11.6	17.2	6.8
Cooktown	4.4	7.0	2.0
Ravenshoe	4.0	6.2	2.0
Undara	2.2	3.1	1.4

Satisfaction levels

Respondents were highly satisfied with their overall visit to the region. On a scale of 1 (‘*very unsatisfactory*’) to 10 (‘*very satisfactory*’), the mean value was 8.25, compared with a mean value of 8.38 in Q3 2007. For international visitors the overall mean was 8.40, and for domestic visits 8.08.

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