

**RAINFOREST TOURISM
QUARTERLY REPORT # 3: RAINFOREST 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 rainforest tourism in the Wet Tropics rainforests. The data presented in this report summarise the results from the **third quarter (Q3)** of data collection in the Tropical North Queensland (TNQ) region from **July to September 2008**. Overall, a total of **266 surveys** were returned for this quarter from rainforest locations. Results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, rainforest activities, and environmental and cultural interpretation. This report compares the current quarter (July to September 2008) with the corresponding quarter in 2007.



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.



2. METHODOLOGY

The methodology used in this research was structured visitor surveys collected by tour operators, tourist attractions and the project research team. The study locations and sample for this quarter are shown in Table 1.

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

Table 1: Survey Locations and Sample Size, Q3 2008.

Location	Sample
Northern	205
Cairns / Kuranda	50
Atherton Tablelands	11
Total	266



3. LIMITATIONS

During this period, limitations included difficulties encountered by visitor information centres in survey collection. Additionally, the surveys were conducted in English and Chinese, leaving for instance the Japanese visitor market under-represented in this quarter's data.



4. FINDINGS

Gender and origin of respondents

The sample consisted of 45.8% females and 54.2% males. This differed slightly from Q3 2007 where 52.1% of respondents were female and 47.9% were male.

Figure 1 shows that 69.5% of respondents were from Australia (63.5% in 2007) and 30.5% were from overseas (36.5% in 2007).

International visitors were mainly from the UK and Ireland (10.2%) (10.3% in 2007) and Europe (6.0%) (7.4% in 2007).

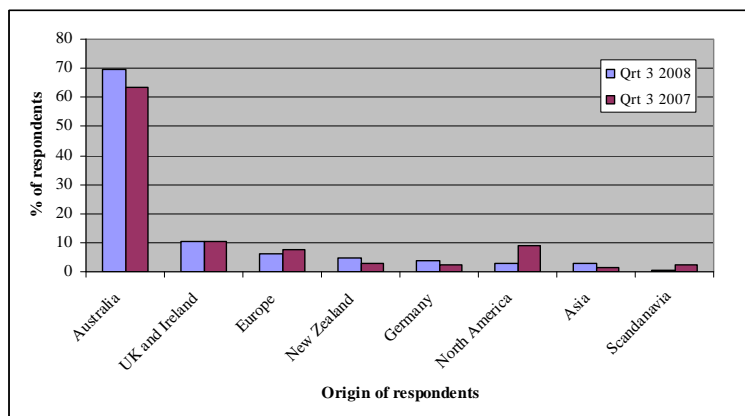


Figure 1: Origin of respondents, Q3 2007-2008.

Occupation

The major occupation groups of respondents were:

- **Professionals** (24.4%) (30.9% in 2007);
- **Retirees/semi-retirees** (18.3%) (16.5% in 2007);
- **Self-employees** (14.9%) (7.6% in 2007);
- **Managers** (9.2%) (6.5% in 2007);
- **Students** (5.7%) (10.0% in 2007) and;
- **Office staff/clerks** (5.0%) (5.9% in 2007).

Age of Respondents

As shown in Figure 2, the main age groups of respondents were: 20-29 years (17.9%) (17.0% in 2007), 30-39 years (18.7%) (19.9% in 2007) and 50-59 years (22.9%) 19.2% in 2007).

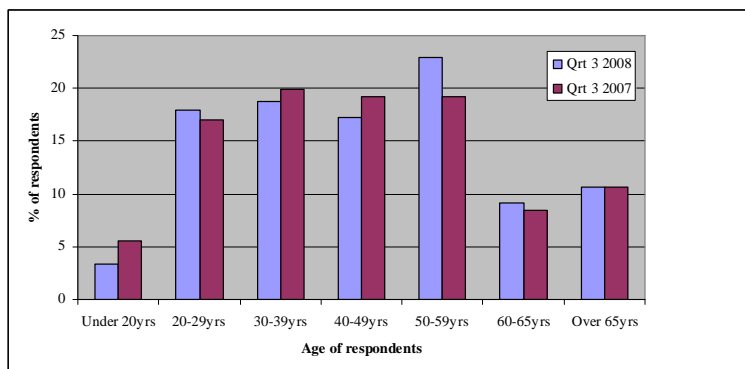


Figure 2: Age of respondents, Q3 2007-2008.

Travel Party

The composition of travel parties were:

- **Couples** (58.2%) (51.8% in 2007);
- **Family with children** (12.6%) (20.4% in 2007);
- **With friends** (9.6%) (11.1% in 2007);
- **With relatives** (8.8%) (6.3% in 2007);
- **As part of a tour group** (6.9%) (5.6% in 2007) and;
- **Alone** (3.8%) (4.8% in 2007).

Previous visits and length of stay

Just under sixty percent (58.5%) of respondents indicated that this was their first visit to Tropical North Queensland (compared with 64.9% in Q3 2007). Those who had visited in the past had visited between one and three times (78.11%).

The overall average length of stay was 8.52 nights, which was a large decrease on the Q3 2007 average of 9.94 nights.

Accommodation and Transport

Table 2 illustrates the most popular accommodation types used by respondents.

Table 2: Accommodation used by respondents, Q3 2007-2008 (%).

Type	Q3 2008	Q3 2007
Hotels / motels	22.1	21.4
Apartments	21.3	20.1
Resorts	31.4	23.8
Backpackers'	3.5	10.0
Friends / family	5.4	2.6
Caravan park	9.3	12.2
Camping	5.4	6.3
Bed 'n' breakfast	1.6	3.5

Table 3 illustrates the popularity of the different types of transport used by respondents to travel to and around the region while holidaying.

Table 3: Mode of transport used by respondents, Q3 2007-2008 (%).

Type	Q3 2008	Q3 2007
Air	39.3	39.2
Rented car	29.4	32.2
Bus / coach	7.3	7.0
Private vehicle	16.8	17.6
Rented van	2.7	3.1
Other	2.3	0.2
Cruise boat	0.0	0.0
Rail	1.5	0.7

Information sources

The most popular sources of information used by visitors are outlined in Table 4 below.

Table 4: Information sources used by respondents, Q3 2007-2008 (%).

Type	Q3 2008	Q3 2007
Friends / family	44.7	42.1
Internet / WWW	28.6	32.5
Guide books	26.0	32.5
Travel agents	10.3	14.1
Have been before	23.3	23.0
TV documentaries	10.7	11.1
Ads in print	4.2	3.7
Visitor centres	5.7	7.8
Ads on television / radio	6.9	5.6

Motivations to travel to the region

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

Overall, the top five motives for Q3 2008 were:

- **To visit the rainforest** (4.29) (4.39 in 2007);
- **To visit the GBR** (4.17) (4.21 in 2007);
- **Rest and relaxation** (4.12) (4.06 in 2007);
- **Experience natural environment** (4.12) (4.17 in 2007) and;
- **Climate** (3.99) (4.03 in 2007).

For domestic visitors, rest and relaxation was the key motivator for visiting the region (4.28) followed by visiting the rainforests (4.26), whereas visiting the reef (4.57) and rainforests (4.37) were major draw cards for international visitors to the region.

Table 5: Respondents' motivations for traveling to the region, Q3 2008.

Motivation	Mean (Scale 1 to 5)		
	Overall	Domest.	Intern.
To visit the rainforests	4.29	4.26	4.37
To visit the GBR	4.17	3.99	4.57
Experience the natural environment	4.12	4.16	4.04
Rest and relaxation	4.12	4.28	3.71
Climate	3.99	4.12	3.67
Walk in the rainforest	3.94	3.99	3.80
See Australian wildlife	3.89	3.71	4.32
Visit a World Heritage Area	3.85	3.91	3.69
Spend time with my family	3.63	3.75	3.32
To visit beaches	3.51	3.54	3.44

Previous holiday and alternative destinations

The most popular destinations by regions given in response to "Where did you spend your last holiday?" were:

- **France** (5.3%);
- **New Zealand** (4.9%);
- **Sydney** (4.1%);
- **Italy** (3.4%);
- **Tasmania** (3.0%);
- **Thailand** (3.0%);
- **Victoria** (3.0%);
- **Melbourne** (2.6%);
- **USA** (2.3%);
- **Europe** (1.9%);
- **Gold Coast** (1.9%);
- **Perth** (1.9%);
- **Spain** (1.9%); and
- **United Kingdom** (1.9%).

A large number of alternative destinations were given by respondents. Overall, the most popular alternative destinations considered when planning this trip were:

- New Zealand (8.4%);
- Sydney (6.8%);
- Tasmania (5.3%);
- Darwin (4.9%);
- Broome (4.2%);
- USA (2.7%); and
- Canada (2.6%).

Rainforest locations visited

The rainforest locations that respondents had visited or intended to visit during this trip were Daintree, Mossman Gorge, Cape Tribulation and Kuranda (Figure 3).

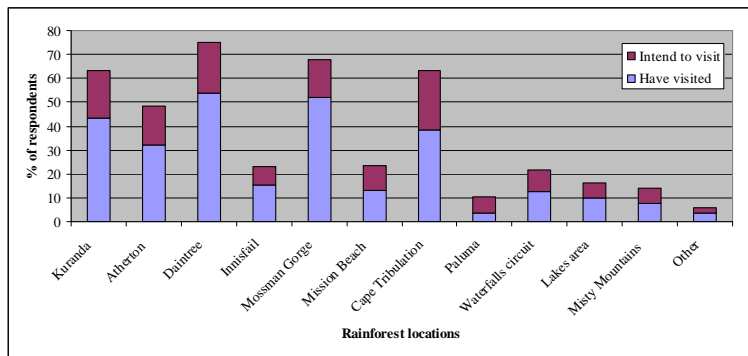


Figure 3: Rainforest locations visited and intended to visit, Q3 2008.

Figure 4 compares the rainforest locations visited by respondents in Q3, 2007-2008.

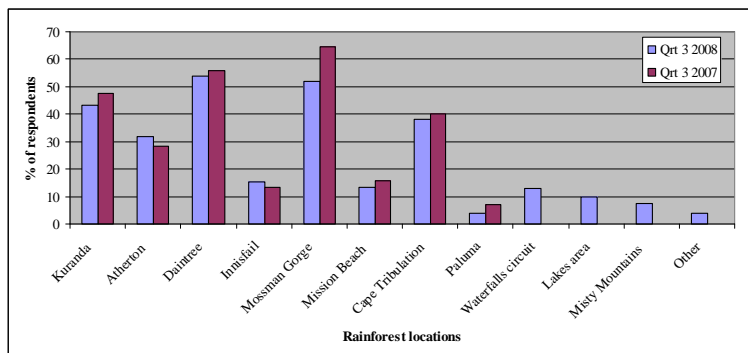


Figure 4: Rainforest locations visited, Q3 2007-2008.

Domestic and international visitors showed significant differences in rainforest location visitation patterns as shown in Table 6.

Table 6: Comparison of rainforest locations visited and visitors' origins, Q3 2008 (%).

Location	Domest.	Intern.
Daintree	68.5	80.0
Mossman Gorge	79.1	68.9
Kuranda	65.1	77.5
Atherton	70.3	48.1
Cape Tribulation	60.8	59.1
Mission Beach	63.8	33.3
Innisfail	81.2	15.4
Paluma	42.9	16.7
Lakes area	62.1	57.1
Waterfalls circuit	59.1	57.1
Misty Mountains	65.4	27.3

Time spent at rainforest locations

Visitors tended to spend:

- Less than half a day at Mossman Gorge (66.7%), Innisfail (53.8%), Cape Tribulation (42.1%), Paluma (50.0%), Daintree (43.2%), Waterfall circuit (45.5%) and Misty Mountains (57.7%);
- Half to one day in Kuranda (50.0%), Atherton Tablelands (39.4%) and the Lakes area (46.4%); and
- More than one day at Mission Beach (45.2%).

The importance of visiting rainforests

Visiting the rainforest was considered important to respondents (mean = 4.18) on a scale of 1 ('not at all important') to 5 ('very important'). This was a slightly lower mean value than Q3 2007 (mean = 4.36).

Similarly, visiting national parks while on holidays was also fairly important for respondents (mean = 3.87), a very comparable mean to Q3 2007 (mean = 3.96).

World Heritage rainforest knowledge

Overall, 68.3% of respondents were aware that the Wet Tropics rainforests were a designated World Heritage Area before they visited, compared with 68.1% of respondents in Q3 2007. Eighty percent of domestic visitors, but only 38.7% of international visitors, were aware of the World Heritage listing.

When asked if they would still visit the region if the rainforests were not a listed World Heritage Area, the majority of respondents said 'Yes' (98.4% compared with 89.5% of respondents Q3 2007), with only 1.6% of respondents who said 'No' (1.1% and 9.4% 'unsure' in Q3 2007).

Rainforest experience

Respondents were asked if they had visited other rainforests elsewhere in Australia and overseas. Only 31.0% of respondents stated that they had visited other rainforests overseas, which included Thailand (6.8%), Malaysia (5.4%), Indonesia (2.7%), Brazil (1.2%) and the Amazon (1.1%).

Environmental and cultural interpretation

Respondents were asked to indicate their level of agreement, on a scale of 1 ('strongly disagree') to 5 ('strongly agree'), with selected statements relating to the interpretation at rainforest sites (Table 7).

Table 7: Interpretation of rainforest sites, Q3 2008.

The environmental information...	Mean
Was interesting and clear	4.49
Influenced my behaviour at the site	3.82
Helped me to understand the ecological processes of this site	4.29
Influenced my attitude towards environmental conservation	3.97
The cultural information...	Mean
Was interesting and clear	4.13
Influenced my behaviour at the site	3.69
Helped me to understand the cultural significance of this site	4.07
Influenced my attitude towards cultural respect	3.83

Generally, visitors agreed that site interpretation was interesting and clear, but that it did not heavily influence their behaviour or attitude.

Rainforest activities

Viewing rainforest scenery was the most popular rainforest activity to visitors, as indicated in Table 8.

Table 8: Respondents' interest in rainforest activities, Q3 2008.

Activity	Percentage		
	Overall	Domest.	Intern.
Walking	87.3	86.5	89.3
Viewing scenery	74.2	74.1	74.7
Viewing wildlife	67.3	65.9	70.7
Filming / Photography	66.9	65.9	69.3
General rest and relaxation	58.1	62.7	46.7
Visiting information centres	42.7	42.7	42.7
Bird watching	37.7	34.6	45.3
Guided tour	33.8	31.4	40.0
Hiking	33.6	32.6	36.0
Swimming	33.5	28.1	46.7
Socialising	28.8	29.7	26.7
Reading site interpretation	28.1	28.1	28.0
Four-wheel driving	17.3	15.7	21.3
Bike riding	13.8	11.9	18.7
Rafting	10.8	10.3	12.0
Camping	7.7	7.0	9.3

Overall visitor satisfaction

Respondents were largely satisfied (mean = 8.57) with their visit to the rainforest and region during their holiday, on a scale of 1 ('very unsatisfactory') to 10 ('very satisfactory'). Domestic visitors were particularly satisfied with a mean of 8.68, compared to internationals with a mean of 8.28. Overall, the mean value was slightly less than Q3 2007 with an overall satisfaction of 8.63.

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