

**RAINFOREST TOURISM
QUARTERLY REPORT # 4: RAINFOREST SURVEY
TNQ Region
October – December 2008**

This quarterly report forms part of a series of reports presented by the Marine and Tropical Sciences Research Facility (MTRSF) and James Cook University (JCU) on rainforest tourism in the Wet Tropics rainforests. The data presented in this report summarise the results from the **four quarter** (Q4) of data collection in the Tropical North Queensland (TNQ) region from **October to December 2008**. Overall, a total of **128 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 (October to December 2008) with the corresponding quarter in 2007.



1. INTRODUCTION

MTRSF 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, Q4 2008.

Location	Sample
Northern	85
Cairns / Kuranda	13
Atherton Tablelands	30
Total	128



3. LIMITATIONS

During this period, limitations included the overall drop in visitor numbers to the region, as well as weather constraints making it difficult to travel to some on-site surveying rainforest sites. Additionally, the surveys were only collected in English, leaving for instance the Japanese and Chinese visitor market under-represented in this quarter's data.



4. FINDINGS

Gender and origin of respondents

The sample consisted of 47.7% females and 52.3% males. This differed slightly from Q4 2007 where 56.8% of respondents were female and 43.2% were male.

Figure 1 shows that 72.2% of respondents were from Australia (50.5% in 2007) and 27.8% were from overseas (49.5% in 2007).

International visitors were mainly from the UK and Ireland (13.5%) (14.9% in 2007) and Europe (7.9%) (13.1% in 2007).

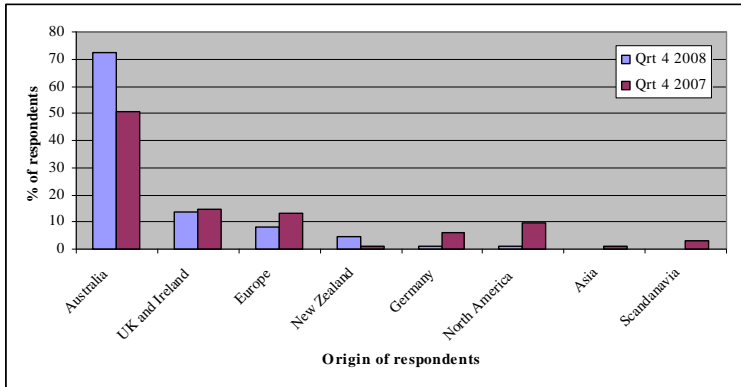


Figure 1: Origin of respondents, Q4 2007-2008.

Occupation

The major occupation groups of respondents were:

- **Professionals** (19.7%) (31.1% in 2007);
- **Retirees/semi-retirees** (19.5%) (10.2% in 2007);
- **Self-employees** (11.0%) (14.7% in 2007);
- **Tradespersons** (10.9%) (2.7% in 2007);
- **Public servants** (9.4%) (3.6% in 2007); and
- **Managers** (7.0%) (8.0% in 2007).

Age of Respondents

As shown in Figure 2, the main age groups of respondents were: 20-29 years (23.0%) (29.2% in 2007), 30-39 years (20.6%) (19.0% in 2007) and 50-59 years (22.2%) (20.4% in 2007).

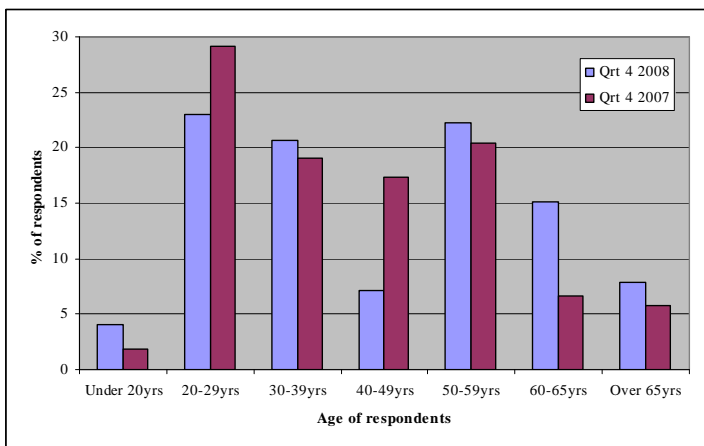


Figure 2: Age of respondents, Q4 2007-2008.

Travel Party

The composition of travel parties were:

- **Couples** (58.6%) (59.9% in 2007);
- **Family with children** (11.7%) (6.6% in 2007);
- **With friends** (10.2%) (20.7% in 2007);
- **As part of a tour group** (7.8%) (3.5% in 2007);
- **Alone** (6.2%) (5.7% in 2007); and
- **With relatives** (5.5%) (3.1% in 2007).

Previous visits and length of stay

Fifty-seven percent of respondents indicated that this was their first visit to Tropical North Queensland (compared with 69.6% in Q4 2007). Those who had visited in the past had visited between one and three times (87.9%).

The overall average length of stay was 7.57 nights, which was a large decrease on the Q4 2007 average of 8.50 nights.

Accommodation and Transport

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

Table 2: Accommodation used by respondents, Q4 2007-2008 (%).

Type	Q4 2008	Q4 2007
Hotels / motels	11.3	21.1
Apartments	21.0	18.4
Resorts	33.6	24.2
Backpackers'	11.7	12.6
Friends / family	10.9	6.7
Caravan park	4.7	7.2
Camping	0.0	7.6
Bed 'n' breakfast	4.7	2.2

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, Q4 2007-2008 (%).

Type	Q4 2008	Q4 2007
Air	54.0	33.9
Rented car	27.8	37.9
Bus / coach	0.8	8.9
Private vehicle	10.3	14.3
Rented van	1.6	4.0
Other	0.8	0.9
Cruise boat	0.0	0.0
Rail	4.7	0.0

Information sources

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

Table 4: Information sources used by respondents, Q4 2007-2008 (%).

Type	Q4 2008	Q4 2007
Friends / family	35.9	41.9
Internet / WWW	28.1	24.7
Guide books	14.8	34.4
Travel agents	10.2	13.2
Have been before	25.0	21.6
TV documentaries	8.6	7.9
Ads in print	7.0	2.6
Visitor centres	7.8	6.6
Ads on television / radio	6.2	7.0

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 Q4 2008 were:

- **To visit the GBR** (4.42) (4.29 in 2007);
- **Rest and relaxation** (4.29) (4.06 in 2007);
- **To visit the rainforest** (4.24) (4.38 in 2007);
- **Walk in the rainforest** (4.14) (Not asked in Q4 2007); and
- **Experience the natural environment** (4.07) (4.17 in 2007).

For domestic visitors, rest and relaxation was the key motivator for visiting the region (4.35) followed by visiting the reef (4.31), and visiting the reef (4.77) and rainforest (4.45) were major draw cards for international visitors to the region.

Table 5: Respondents' motivations for traveling to the region, Q4 2008.

Motivation	Mean (Scale 1 to 5)		
	Overall	Domest.	Intern.
To visit the GBR	4.42	4.31	4.77
Rest and relaxation	4.29	4.35	4.17
To visit the rainforests	4.24	4.17	4.45
Experience the natural environment	4.16	4.16	4.17
Walk in the rainforests	4.14	4.10	4.31
See Australian wildlife	3.98	3.84	4.46
Visit a World Heritage Area	3.95	3.88	4.14
Visit the islands	3.80	3.81	3.76
Climate	3.80	3.94	3.41
Snorkelling and diving	3.75	3.67	4.00

Previous holiday and alternative destinations

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

- **New Zealand** (9.4%);
- **Thailand** (7.0%);
- **France** (5.5%);
- **Fiji** (3.9%);
- **Melbourne** (3.9%);
- **Belgium** (3.1%);
- **Byron Bay** (3.1%);
- **Darwin** (3.1%);
- **Sunshine Coast** (3.1%);
- **Tasmania** (3.1%) and;
- **The Whitsundays** (3.1%).

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

- **Sydney** (7.8%);
- **New Zealand** (6.3%);
- **USA** (5.5%);
- **The Gold Coast** (4.7%);
- **Townsville** (4.7%);

- Perth (3.9%);
- Lord Howe Island (3.1%);
- Uluru (3.1%); and
- Bali (3.1%).

Rainforest locations visited

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

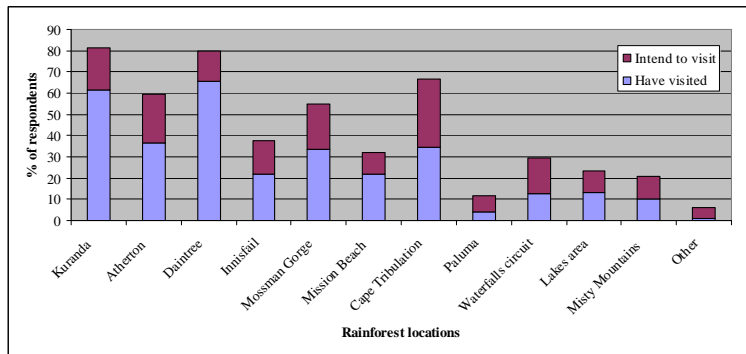


Figure 3: Rainforest locations visited and intended to visit, Q4 2008.

Figure 4 compares the rainforest locations visited by respondents in Q4, 2007-2008.

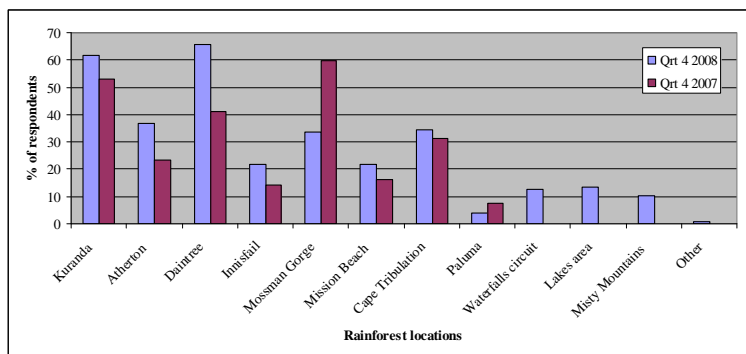


Figure 4: Rainforest locations visited, Q4 2007-2008.

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, Q4 2008 (%).

Location	Domest.	Intern.
Daintree	78.7	92.6
Mossman Gorge	60.0	66.7
Kuranda	77.5	72.7
Atherton	64.5	50.0
Cape Tribulation	48.5	64.7
Mission Beach	73.7	0.0
Innisfail	56.4	66.7
Paluma	28.6	100.0
Lakes area	54.2	66.7
Waterfalls circuit	38.7	57.1
Misty Mountains	50.0	0.0

Time spent at rainforest locations

Visitors tended to spend:

- Less than one day at Mossman Gorge (67.2%), Innisfail (51.4%), Cape Tribulation (46.8%), Mission Beach (56.7%), Waterfall circuit (50.0%) and Misty Mountains (43.8%);
- Half to one day in Kuranda (42.7%), Paluma (50.0%), Atherton Tablelands (44.6%) and the Lakes area (46.4%); and
- More than one day at Daintree (36.5%).

The importance of visiting rainforests

Visiting the rainforest was considered important to respondents (mean = 4.12) on a scale of 1 ('not at all important') to 5 ('very important'). This was a slightly lower mean value than Q4 2007 when the mean was 4.39.

Similarly, visiting national parks while on holidays was also fairly important (mean = 3.90), the same mean from Q4 2007.

World Heritage rainforest knowledge

Overall, 55.5% of respondents were aware that the Wet Tropics rainforest was a designated World Heritage Area before they visited compared with 62.8% of respondents in Q4 2007. Fifty-five percent of domestic visitors and only 54.8% of international visitors were aware of the World Heritage listing.

When asked if they would still visit the region if the rainforest was not a World Heritage Area, the majority of respondents said 'Yes' (93.9%) (89.0% in 2007), with only 6.1% of respondents who said 'No' (0.9% and 10.1% 'unsure' in 2007).

Rainforest experience

Respondents were asked if they had visited other rainforests elsewhere in Australia and overseas. Only 21.6% of respondents stated that they had visited other rainforests overseas. These rainforests included Borneo (2.3%), Thailand (2.3%), Fiji (1.6%), Malaysia (1.6%), New Zealand (1.6%) and Tobago (1.6%).

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, Q4 2008.

The environmental information...	Mean
Was interesting and clear	4.43
Influenced my behaviour at the site	3.98
Helped me to understand the ecological processes of this site	4.49
Influenced my attitude towards environmental conservation	4.08
The cultural information...	Mean
Was interesting and clear	4.31
Influenced my behaviour at the site	3.88
Helped me to understand the cultural significance of this site	4.03
Influenced my attitude towards cultural respect	3.91

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, Q4 2008.

Activity	Percentage		
	Overall	Domest.	Intern.
Walking	70.6	71.4	68.6
Viewing scenery	73.8	73.6	74.3
Viewing wildlife	60.3	62.6	54.3
Filming / Photography	57.9	53.8	68.6
General rest and relaxation	56.3	60.4	45.7
Swimming	43.7	46.2	37.1
Visiting information centres	38.9	34.1	51.4
Guided tour	31.0	34.1	22.9
Hiking	29.4	33.0	20.0
Bird watching	28.6	23.1	42.9
Reading site interpretation	25.4	22.0	34.3
Socialising	16.7	22.0	2.9
Four-wheel driving	7.1	9.9	0.0
Rafting	5.6	7.7	0.0
Bike riding	4.0	5.5	0.0
Camping	3.2	4.4	0.0

Overall visitor satisfaction

Respondents were largely satisfied (mean = 8.47) 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 8.47, compared to internationals with a mean of 8.47 also. Overall, the mean value was slightly less than Q4 2007 with an overall satisfaction of 8.39.

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