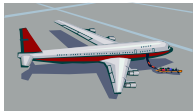


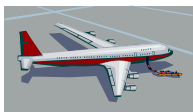
**TOURISM**  
**QUARTERLY REPORT # 2: AIRPORT EXIT SURVEY**  
**TNQ Region**  
**July – September 2009**

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 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 2009**. Overall, a total of **591 surveys** were returned for this quarter from the international and domestic terminals of Cairns Airport. 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 2009) with the corresponding quarters in 2008 and 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 region 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).

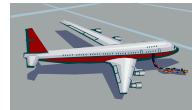


**2. METHODOLOGY**

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

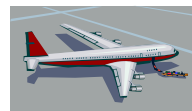
This location hosts domestic and international visitors travelling within Australia and transferring between international and domestic flights, linking Cairns with all of the Australian capital cities, most of the regional centres, islands of the Great Barrier Reef and Alice Springs/Uluru in Central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

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



**3. SAMPLE AND LIMITATIONS**

A total of 591 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 591 respondents of whom 58.6% were females (55.7% in Q2 2008; 56.9% in Q2 2007) and 41.4% were males (44.3% in 2008; 43.1% in 2007). Figure 1 illustrates that visitors were mainly from Australia (44.2%) (46.5% in 2008; 47.3% in 2007), the UK and Ireland (16.0%) (16.7% in 2008; 16.7% in 2007) and North America (10.2%) (12.4% in 2008; 11.4% in 2007).

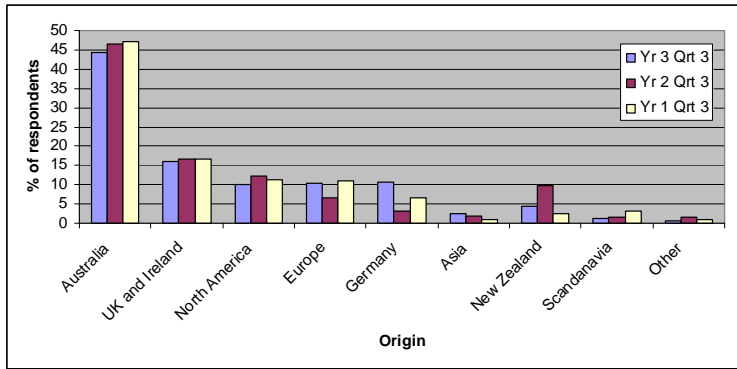


Figure 1: Origin of respondents, Q3 2007-2009.

**Occupation**

The most common types of occupations that respondents indicated were:

- **Professional** (24.2%, 29.6% in 2008 and 23.4% in 2007);
- **Student** (18.9%, 20.4% in 2008 and 16.0% in 2007);
- **Retired/semi-retired** (12.0%, 7.9% in 2008 and 18.5% in 2007);
- **Self-employed** (10.5%, 8.6% in 2008 and 9.9% in 2007);
- **Management** (9.6%, 7.1% in 2008 and 7.6% in 2007) and;
- **Public service** (7.0%, 7.1% in 2008 and 2.5% in 2007).

**Age of Respondents**

As shown in Figure 2, the most common age group of respondents was 20-29 years in 2008 and 30-39 years in 2007. In this quarter, the survey requested the year respondents were born (instead of an age group selection). As a result, comparisons cannot be made across the years. For this quarter however, the average year born for respondents was 1969 (with a minimum of 1921 and maximum of 1997).

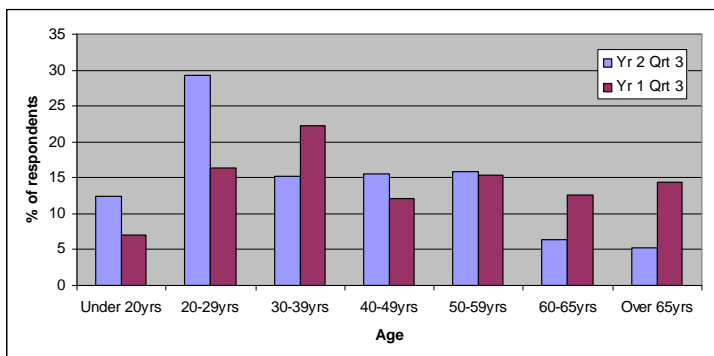


Figure 2: Age of respondents, Q3 2007-2008.

**Travel Party**

Respondents mainly travelled as a couple (45.9%, 34.7% in 2008 and 42.9% in 2007), with friends (15.9%, 14.2% in 2008 and 12.4% in 2007), alone (13.5%, 15.7% in 2008 and 17.7% in 2007), as a family with children (11.9%, 16.8% in 2008 and 13.6% in 2007), with relatives (7.0%, 7.7% in 2008 and 10.1% in 2007), as part of a tour group (4.1%, 10.9% in 2008 and 1.8% in 2007), or as part of a club (1.7%, 0.0% in 2008 and 1.5% in 2007).

**Previous visits and length of stay**

Sixty-four percent of respondents said this was their first visit to Tropical North Queensland (61.5% in 2008 and 61.5% in 2007). Only 38.0% of domestic visitors were first timers (31.5% in 2008), while 84.3% of international visitors were first time visitors to the region (68.5% in 2008).

Overall, only 36.0% of respondents were repeat visitors (38.5% in 2008 and 38.5% in 2007). A large proportion of repeat visitors had visited 1-3 times before (87.9%, over 90% in 2008).

The overall average length of stay in the region was 9.08 nights, compared with 7.92 nights in 2008 and 7.87 nights in 2007.

**Accommodation and transport**

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

**Table 1: Accommodation used by respondents, Q3 2007-2009 (%)**

Type	Q3 2009	Q3 2008	Q3 2007
Hotels / motels	27.3	34.6	34.2
Apartments	20.4	21.0	18.2
Resorts	17.6	15.2	15.7
Backpackers' hostel	15.2	19.4	17.2
Friends / family	7.8	4.4	9.3
Caravan park	6.9	3.9	2.0
Camping	3.8	1.2	3.2
Bed 'n' breakfast	0.9	0.2	0.2

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 2007-2009 (%).**

Type	Q3 2009	Q3 2008	Q3 2007
Air	49.7	49.9	52.7
Rented car	23.4	18.0	17.9
Bus / coach	14.7	23.2	17.9
Private vehicle	3.2	3.3	6.5
Rented van	5.8	3.3	2.2
Other	1.5	0.9	1.4
Cruise boat	0.2	0.5	1.0
Rail	1.4	0.9	0.5

### 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 2007-2009 (%).**

Type	Q3 2009	Q3 2008	Q3 2007
Friends / family	43.9	40.0	40.4
Internet / WWW	32.9	31.4	22.8
Guide books	34.1	28.0	28.1
Travel agents	20.2	21.2	19.2
Have been before	19.3	20.0	16.3
TV documentaries	9.6	5.0	7.0
Visitor centres	7.1	5.0	4.6
Ads in print	6.8	5.0	4.6
Ads on television / radio	3.2	3.6	4.3
Other	4.6	5.2	11.8

### 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 4.

Overall, the top six motives for Q3 2009 were:

- **To visit the Great Barrier Reef** (4.15);
- **Rest and relaxation** (4.03);
- **To visit the rainforest** (3.93);
- **See Australian wildlife** (3.81);

- **Climate** (3.77);
- **Experience natural environment** (3.74); and
- **Snorkelling and diving** (3.74).

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 (4.27) and the climate (3.94), while international visitors were most motivated by visiting the Great Barrier Reef (4.58) and seeing Australian wildlife (4.14).

**Table 4: Respondents' motivations for traveling to the region, Q3 2009.**

Motivation	Mean (Scale 1 to 5)		
	Overall	Domest.	Intern.
To visit the GBR	4.15	3.56	4.58
Rest and relaxation	4.03	4.27	3.88
To visit the rainforests	3.93	3.68	4.10
See Australian wildlife	3.81	3.35	4.14
Climate	3.77	3.94	3.66
Experience the natural environment	3.74	3.76	3.75
Snorkelling and diving	3.74	3.47	3.91
Visit World Heritage Area/s	3.59	3.36	3.76
Price matched travel budget	3.55	3.66	3.47
Visit the beaches	3.52	3.49	3.57

### Visits to the Wet Tropics rainforests

Overall, the majority of respondents (78.5%) visited the Wet Tropics rainforests during their holiday in TNQ this quarter, compared with 69.0% of respondents in the same quarter in 2008, and 76.8% of respondents in 2007.

Respondents who said they had visited the rainforest during their holiday were asked to indicate which locations they had visited; illustrated in Figure 3.

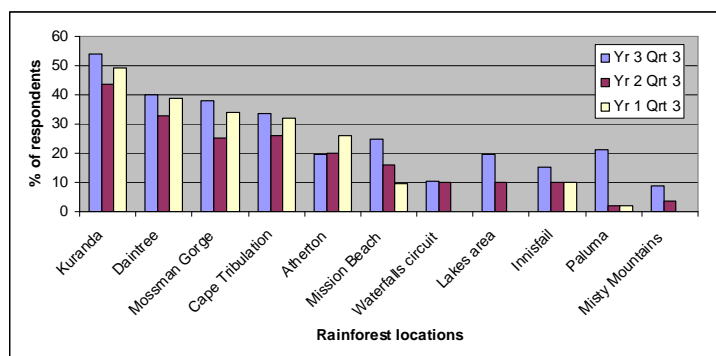


Figure 3: Rainforest locations visited, Q3 2007-2009.

Respondents who had not visited the rainforest during their holiday (24.5% of respondents, 31.0% in 2008) mainly suggested there was ‘not enough time’ to do so (22.0%, 19.4% in 2008).

**Rainforest activities**

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

Table 5: Respondents’ interest in rainforest activities, Q3 2008-2009.

Activity	Percentage	
	Q3 2009	Q3 2008
Walking	64.6	57.8
Viewing scenery	31.8	48.0
Viewing wildlife	53.8	41.8
Swimming	24.7	29.5
General relaxation	46.0	40.0
Filming / photography	55.3	32.4
Guided tour	38.7	29.5
Visiting information centres	31.3	21.8
Socialising	38.6	18.5
Reading site interpretation	18.8	11.6
Bird watching	17.7	13.1
Hiking	33.8	19.3
Four-wheel driving	12.2	8.4
Rafting	24.5	9.5
Camping	7.0	4.4
Bike riding	15.5	8.7

**Visits to the Great Barrier Reef**

Nearly 79% of respondents visited the GBR on their trip to the region, compared with

67.3% of respondents during the same quarter in 2008 and 68.4% of respondents in 2007. Figure 4 shows the departures sites used to travel to the GBR in Q3 of 2009, 2008 and 2007.

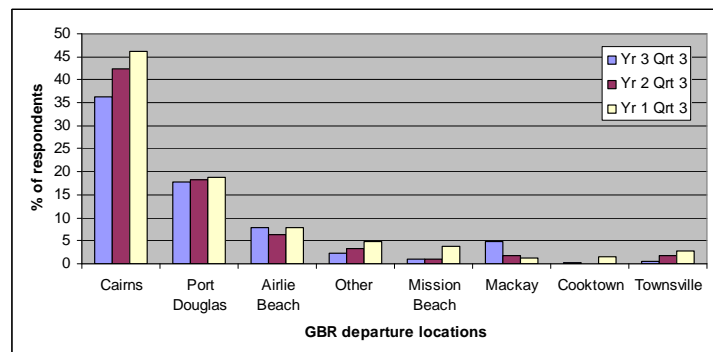


Figure 4: Departure locations for trips to the reef, Q3 2007-2009.

Respondents who had not visited the GBR during their holiday (23.1% of respondents and 32.7% of respondents in 2008) gave the following reasons – ‘no time’ (16.6%, 11.3% in 2008), ‘been before’ (10.8%, 13.4% in 2008) and ‘no money’ (10.2%, 6.0% in 2008).

**Reef activities**

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

Table 6: Respondents’ interest in reef activities, Q3 2009.

Activity	Percentage	
	Q3 2009	Q3 2008
Snorkelling	47.5	54.5
Swimming	48.6	41.5
Glass-bottom boat tour	13.9	26.5
Viewing marine animals	26.9	25.5
Visiting islands	11.3	15.6
Sailing	37.6	13.5
Certified SCUBA diving	42.5	10.5
Resort / uncertified SCUBA diving	6.4	7.6
Diver training course	5.1	5.8
Helicopter flight	36.0	3.3
Overnight cruise	6.4	2.9
Marine biology tour	15.9	8.0

**Service quality**

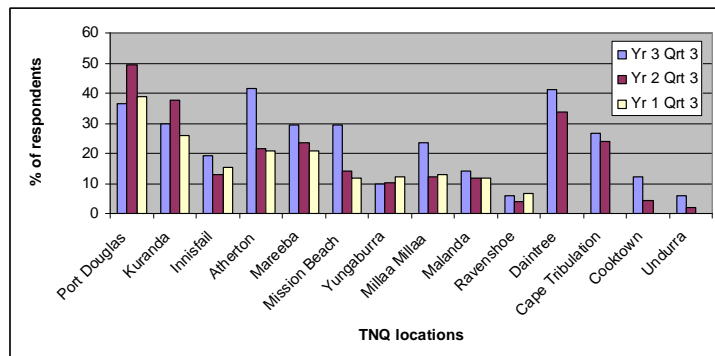
Respondents were asked to reflect on their level of satisfaction with a number of aspects of their visit to the region, on a scale of 1 (*not at all satisfactory*) to 5 (*very satisfactory*). Table 7 shows the results of these from Q3 in 2008 and 2009.

**Table 7: Respondents' satisfaction with service quality, Q3 2008-2009.**

Service quality aspects	Mean	
	Q3 2009	Q3 2008
Accommodation – friendly staff	4.23	4.13
Accommodation – value for money	3.96	3.67
Accommodation – service standard	3.96	3.74
Tours – Tour guides were informative	4.14	4.07
Tours – value for money	3.89	3.81
Tours – service standards	4.00	3.97
Tours – were on-time	4.21	4.08
Attractions – value for money	3.89	3.80
Restaurants – staff were efficient	3.50	3.72
Restaurants – value for money	3.54	3.45
Restaurants – menu selections	3.69	3.65
Shopping – was enjoyable	3.15	3.45
Shopping – good variety	3.37	3.43
Shopping – store closing times	3.27	3.42
Public transport – was accessible	3.50	3.38
Public transport – was on-time	3.52	3.35
Visitor information – was accurate	3.93	3.82
Visitor information – was accessible	4.02	3.85
Safety – felt safe and secure during travels	4.37	4.17

**Locations driven through within the region**

Figure 5 compares the main locations that respondents who used private/rented vehicles to drive within the region visited in Q3 2007-2009.



**Figure 5: Locations travelled to by respondents with private/rented vehicles, Q3 2007-2009.**

**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 8.51 (compared with a mean value of 8.25 in 2008 and 8.38 in 2007). For international visitors the overall mean was 8.55 (8.40 in 2008), and for domestics was 8.48 (8.08 in 2008).

**Weddings and honeymoons**

In this quarter, respondents were asked if they were visiting North Queensland to attend a wedding or honeymoon – 2.9% of respondents indicated wedding attendance. Of these visitors, 77.3% indicated that they would recommend the region for weddings. Honeymooners represented 4.5% of all visitors surveyed in this quarter.

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