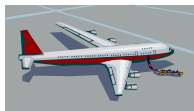


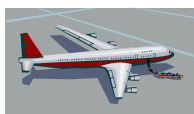
TOURISM
QUARTERLY REPORT # 1: AIRPORT EXIT SURVEY
TNQ Region
January – March 2009

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 **first quarter** (Q1) of data collection in the TNQ region from **January to March 2009**. Overall, a total of **206 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 (January to March 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).

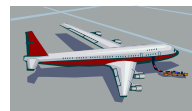


2. METHODOLOGY

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

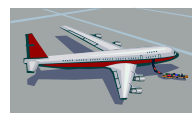
This location hosts domestic and international visitors travelling within Australia and transferring between international and domestic flights, linking Cairns with all of the Australian capital cities, most of the regional centres, islands of the Great Barrier Reef and Alice Springs/Uluru in Central 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 206 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 206 respondents of whom 45.6% were females (55.9% in 2008; 55.7% in 2007) and 54.4% were males (44.1% in 2008; 44.3% in 2007). Figure 1 illustrates that visitors were mainly from Australia (46.2) (29.9% in 2008; 35.7% in 2007), Asia (12.4%) (3.1% in 2008; 1.7% in 2007), the UK and Ireland (11.8%) (26.8% in 2008; 29.3% in 2007) and Europe (10.2%) (5.2% in 2008; 5.8% in 2007).

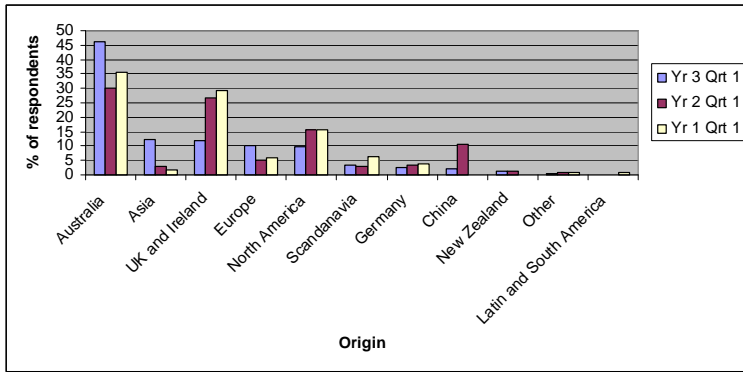


Figure 1: Origin of respondents, Q1 2007-2009.

Occupation

The most common types of occupations that respondents indicated were:

- **Student** (22.0%) (13.6% in 2008; 12.0% in 2007);
- **Professional** (17.6%) (22.4% in 2008; 21.7% in 2007);
- **Management** (13.7%) (9.8% in 2008; 5.7% in 2007);
- **Office-clerical** (8.3%) (7.9% in 2008; 4.3% in 2007);
- **Retired/semi-retired** (7.8%) (16.6% in 2008; 21.4% in 2007); and
- **Self-employed** (7.8%) (9.3% in 2008; 10.0% in 2007).

Age of Respondents

As shown in Figure 2, the major age groups of respondents were 20-29 years (46.6%) (30.6% in 2008; 29.4% in 2007), 50-59 years (12.7%) (16.0% in 2008; 13.7% in 2007) and 30-39 years (14.2%) (15.5% in 2008; 14.0% in 2007).

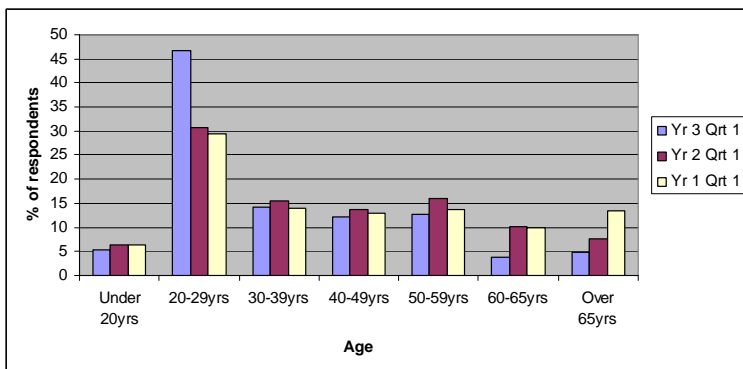


Figure 2: Age of respondents, Q1 2007-2009.

Travel Party

Respondents mainly travelled as a couple (39.4%) (43.8% in 2008; 42.5% in 2007), with friends (27.1%) (19.5% in 2008; 16.4% in 2007), alone (16.7%) (11.3% in 2008; 23.4% in 2007), as a family with children (3.9%) (8.2% in 2008; 4.3% in 2007) or with relatives (6.4%) (8.2% in 2008; 7.0% in 2007), as part of a tour group (5.4%) (7.5% in 2008; 6.4% in 2007) or club (1.0%) (1.4% in 2008; 0% in 2007).

Previous visits and length of stay

Over sixty percent of respondents said this was their first visit to Tropical North Queensland (74.5% in 2008). Only 33.7% of domestic visitors were 'first-timers' (44.9% in 2008), while 83.8% of international visitors were first-time visitors to the region (87.2% in 2008).

Overall, only 36.1% of respondents were repeat visitors (25.5% in 2008; 29.8% in 2007). A large proportion of repeat visitors had visited between one and three times before (84.5%) (over 90% in 2008).

The overall average length of stay in the region was 10.56 nights, compared with 6.47 nights in Q1 2008 and 8.42 nights in Q1 2007.

Accommodation and transport

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

Table 1: Accommodation used by respondents, Q1 2007-2009 (%)

Type	Q1 2009	Q1 2008	Q1 2007
Hotels / motels	36.7	38.2	38.0
Apartments	17.6	19.6	13.4
Resorts	12.2	18.2	16.1
Backpackers'	24.5	15.2	19.5
Friends / family	6.4	4.7	9.2
Caravan park	2.1	3.3	2.1
Camping	0.0	0.7	1.0
Bed 'n' breakfast	0.5	0.2	0.7

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, Q1 2007-2009 (%).

Type	Q1 2009	Q1 2008	Q1 2007
Air	63.2	58.5	56.7
Rented car	7.5	16.5	11.7
Bus / coach	14.4	14.8	19.1
Private vehicle	10.9	3.9	8.7
Rented van	0.5	3.0	1.0
Other	2.5	2.1	1.3
Cruise boat	0.5	0.9	1.0
Rail	0.5	0.2	0.3

Information sources

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

Table 3: Information sources used by respondents, Q1 2007-2009 (%).

Type	Q1 2009	Q1 2008	Q1 2007
Friends / family	34.0	49.2	44.5
Internet / WWW	33.5	34.2	26.8
Guide books	28.2	30.8	36.1
Travel agents	28.2	25.4	18.1
Have been before	17.0	18.5	20.7
TV documentaries	8.3	8.5	7.0
Visitor centres	6.3	5.6	4.3
Ads in print	4.9	3.3	4.0
Ads on television / radio	3.4	1.8	2.3
Other	6.9	4.4	5.4

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 five motives for Q1 2009 were the same as those in Q1 2008 and 2007:

- **To visit the GBR** (4.24) (4.53 in 2008; 4.40 in 2007);
- **To visit the rainforest** (3.78) (4.01 in 2008; 3.95 in 2007);
- **Experience natural environment** (3.71) (3.94 in 2008; 3.86 in 2007);
- **See Australian wildlife** (3.68) (3.98 in 2008; 3.77 in 2007); and
- **Rest and relaxation** (3.66) (3.98 in 2008; 3.90 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 (3.57) (4.48 in 2008) and the opportunity to visit the GBR (3.59) (4.04 in 2008). While international visitors were also motivated to visit the Great Barrier Reef (4.67) (4.69 in 2008), they were also very motivated to see Australian wildlife (4.18) (4.18 in 2008).

Table 4: Respondents' motivations for traveling to the region, Q1 2009.

Motivation	Mean (Scale 1 to 5)		
	Overall	Domest.	Intern.
To visit the GBR	4.20	3.59	4.67
To visit the rainforests	3.73	3.21	4.12
See Australian wildlife	3.61	2.88	4.18
Rest and relaxation	3.64	3.57	3.70
Experience the natural environment	3.67	3.26	3.98
Snorkelling and diving	3.68	3.24	4.04
Walking in the rainforest	3.34	2.96	3.63
Visit a World Heritage Area	3.23	2.94	3.45
Climate	3.29	2.99	3.53
To visit beaches	3.39	3.18	3.56

Previous holiday and alternative destinations

The most popular (single) destinations given in response to “Where did you spend your last holiday?” were Japan (6.8%), Sydney (3.9%) (2.8% in 2008), New Zealand (4.4%) (3.0% in 2008), Thailand (3.4%) (2.9% in 2008), Italy (2.4%) (1.81% in 2008), Gold Coast (1.9%) (1.6% in 2008), Europe (1.9%) (1.8% in 2008), United States of America (1.9%) (3.6% in 2008), Tasmania (1.0%) (1.4% in 2008), Spain (0.5%) (2.8% in 2008) and France (0.5%) (2.3% in 2008).

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 (7.3%) (15.6% in 2008), Sydney (7.3%) (12.0% in 2008), Brisbane (4.9%) (3.6% in 2008), United States of America (2.9%) (5.7% in 2008), Fiji (1.9%) (8.1% in 2008), Melbourne (1.0%) (10.0% in 2008) and Europe (0.5%) (3.3% in 2008).

Visits to the Wet Tropics rainforests

Overall, the majority of respondents (67.9%) visited the Wet Tropics rainforests during their holiday in TNQ this quarter, compared with 77.6% of respondents in Q1 2008 and 74.7% in Q1 2007.

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

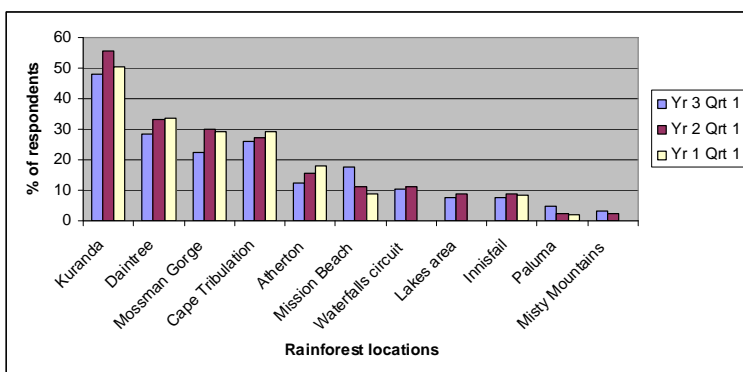


Figure 3: Rainforest locations visited, Q1 2007-2009.

Respondents who had not visited the rainforests during their holiday (32.1%) (22.4% in 2008) mainly advised there was

‘not enough time’ (27.6%) (21.4% in 2008) to do so.

Rainforest activities

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

Table 5: Respondents’ interest in rainforest activities, Q1 2009.

Activity	Percentage		
	Overall	Domest.	Intern.
Walking	45.9	30.6	59.2
Viewing scenery	36.1	27.1	43.9
Viewing wildlife	35.0	17.6	50.0
General rest and relaxation	29.0	21.2	35.7
Filming / photography	39.3	22.4	54.1
Guided tour	26.2	15.3	35.7
Visiting information centres	13.7	5.9	20.4
Socialising	20.2	18.8	21.4
Reading site interpretation information	8.2	2.4	13.3
Bird watching	8.7	2.4	14.3
Hiking	26.8	20.0	32.7
Four-wheel driving	7.7	7.1	8.2
Rafting	31.1	21.2	39.8
Camping	1.6	2.4	1.0
Bike riding	5.5	3.5	7.1

Visits to the Great Barrier Reef

Over seventy percent of respondents visited the GBR on their trip to the region, compared with 87.1% of respondents in Q1 2008 and 72.5% in Q1 2007. Figure 4 shows the departure sites used to travel to the GBR in Q1 2007-2009.

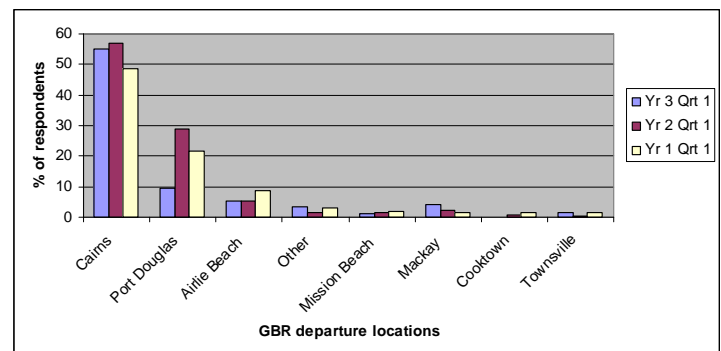


Figure 4: Departure locations for reef trips, Q1 2007-2009.

Respondents who had not visited the GBR during their holiday (25.8%) (12.9% in 2008) gave the following reasons:

- **'No time'** (18.3%) (12.6% in 2008);
- **'Have been before'** (4.2%) (5.1% in 2008); and
- **'Could not afford it'** (4.8%) (4.1% in 2008).

Reef activities

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

Table 6: Respondents' interest in reef activities, Q1 2009.

Activity	Percentage		
	Overall	Domest.	Intern.
Snorkelling	49.5	40.5	57.0
Swimming	39.1	33.3	44.0
Glass-bottomed boat / semi-submersible tours	19.6	17.9	21.0
Viewing marine animals	23.9	19.0	28.0
Visiting reef islands	14.1	9.5	18.0
Sailing	10.9	9.5	12.0
Certified SCUBA diving	16.8	11.9	21.0
Resort / uncertified SCUBA diving	10.9	2.4	18.0
Diver training course	8.2	4.8	11.0
Helicopter flight	6.0	2.4	9.0
Overnight cruise	5.4	1.2	9.0
Marine biologist's tour	4.9	7.1	3.0

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 for Q1 2009.

Table 7: Respondents' satisfaction with service quality, Q1 2009.

Aspect	Mean		
	Overall	Domes.	Intern.
Accommodation – friendly staff	4.09	3.99	4.16
Accommodation – value for money	3.95	3.87	4.01
Accommodation – service standard	3.81	3.72	3.88
Tours – guides were informative	3.94	3.72	4.07
Tours – value for money	3.68	3.54	3.77
Tours – service standard	3.80	3.69	3.87
Tours – were on time	4.20	3.83	4.42
Attractions – value for money	3.88	3.59	4.07
Restaurants – staff were efficient	3.68	3.51	3.78
Restaurants – value for money	3.55	3.43	3.63
Restaurants – menu selections	3.75	3.65	3.82
Shopping – was enjoyable	3.44	3.31	3.52
Shopping – good variety	3.38	3.12	3.56
Shopping – closing times	3.05	3.04	3.06
Public transport – was accessible	3.31	3.16	3.42
Public transport – was on time	3.53	3.36	3.64
Visitor information – was accurate	3.85	3.60	4.01
Visitor information – was accessible	3.93	3.72	4.07
Safety – felt safe / secure moving around	4.15	3.89	4.32

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 Q1 2007-2009.

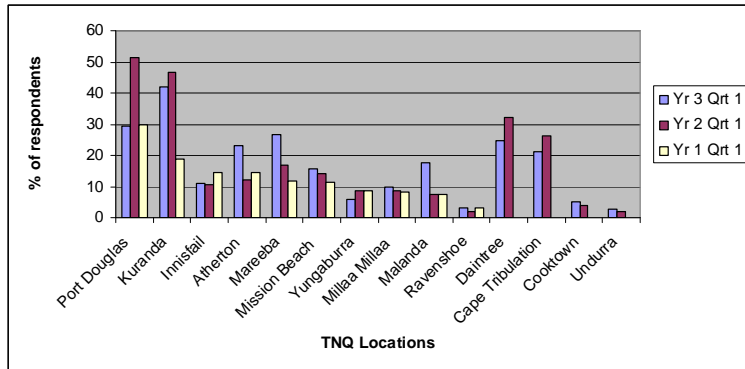


Figure 5: Locations travelled to by respondents with private/rented vehicles, Q1 2007-2009.

Table 8 illustrates the locations travelled to in TNQ in Q1 2009 by respondents, and in particular the places travelled to by domestic and international visitors.

Table 8: Locations traveled to by survey respondents, Q1 2009.

Location	Percentage		
	Overall	Domes.	Intern.
Port Douglas	29.5	25.0	33.3
Kuranda	39.0	23.8	52.0
Daintree	24.0	14.3	32.3
Cape Tribulation	20.2	9.5	29.3
Mareeba	26.2	19.0	32.3
Mission Beach	14.2	9.5	18.2
Atherton	21.9	13.1	29.3
Innisfail	10.4	13.1	8.1
Yungaburra	4.9	1.2	8.1
Millaa Millaa	8.7	6.0	11.1
Malanda	16.4	8.3	23.2
Cooktown	3.8	1.2	6.1
Ravenshoe	1.6	1.2	2.0
Undara	1.6	1.2	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 8.33 (8.40 in 2008; 8.49 in 2007). For international visitors the overall mean was 8.62 (8.48 in 2008), and for domestic visitors was 7.94 (8.19 in 2008).

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