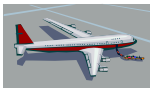


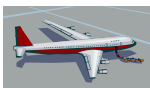
TOURISM
QUARTERLY REPORT #4: AIRPORT EXIT SURVEY
TNQ Region
October – December 2009

This quarterly report forms part of a series of reports presented by the Marine and Tropical Science Research Facility (MTRSF) and James Cook University (JCU) on tourism in Tropical North Queensland (TNQ). The data presented in this report summarises the results from the current quarter of data collection in the TNQ region from **October to December 2009**. Overall, a total of **256 surveys** were returned for this quarter from the Domestic terminals at the **Cairns Airport**. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef and rainforest experiences. The barometers are designed to compare the current quarter with the corresponding quarter for last years.



1. INTRODUCTION

The MTRSF research Project 4.9.2 Sustainable Nature-based Tourism: Planning & Management aims *to identify major issues relating to tourist motivations and behaviours for tourists visiting the Wet Tropics and to identify key trends and drivers. The research was **not** designed to provide information on the overall numbers of visitors who visit the region or how these figures vary on a yearly basis. Research funded by Tourism Research Australia is able to provide high quality data on visitor numbers and to [a limited/limited](#) extent knowledge about visitor activities.*



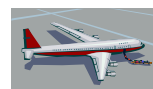
2. METHODOLOGY

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

This location hosts domestic and international visitors travelling within Australia and transferring

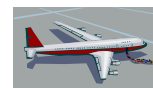
between international and domestic flights, linking Cairns with all of the Australian capital cities, most of the regional centres in the TNQ region, Great Barrier Reef islands and Alice Springs/Uluru in Central Australia.

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



3. SAMPLE & LIMITATIONS

A total of 256 valid surveys were collected from domestic and international visitors at the Cairns Airport during this survey period. The survey was distributed in English.



4. FINDINGS

Gender and origin of respondents

The sample consisted of 256 respondents (343 in Qrt 4 2008; 339 in Qrt 4 2007) of whom 53.7% were females (48.1% in Qrt 4 2008; 58.4% in Qrt 4 2007) and 46.3% were males (51.9% in Qrt 4 2008; 41.6% in Qrt 4 2007). Figure 1 illustrates that visitors were mainly from the UK & Ireland (36.7%; 17.9% in Qrt 4 2008; 26.9% in Qrt 4 2007) and Australia (19.5%; 39.1% in Qrt 4 2008; 32.5% in Qrt 4 2007).

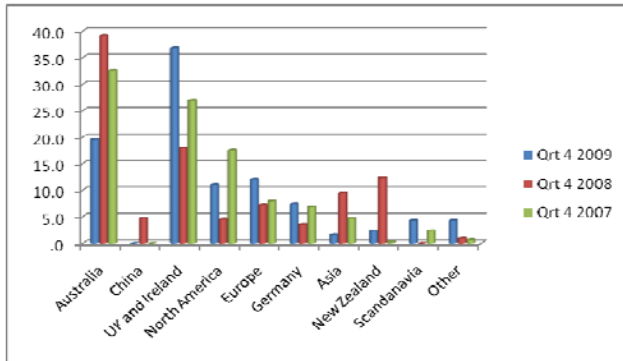


Figure 1: Origin of respondents (%)

Occupation

The occupations of respondents were:

- Professional (29.2%; 28.0% in Qrt 4 2008; 25.8% in Qrt 4 2007);
- Student (16.2%; 9.8% in Qrt 4 2008; 14.5% in Qrt 4 2007);
- Retired/semi-retired (15.4%; 9.2% in Qrt 4 2008; 16.6% in Qrt 4 2007)
- Self-employed (10.7%; 11.6% in Qrt 4 2008; 8.6% in Qrt 4 2007);
- Office/Clerical (8.3%; 6.8% in Qrt 4 2008; 7.4% in Qrt 4 2007) and;
- Management (5.5%; 11.9% in Qrt 4 2008; 7.1% in Qrt 4 2007).

Age

As shown in Figure 2, the major age groups of respondents were 20-29 years (37.1%; 20.3% in Qrt 4 2008; 10.1% in Qrt 4 2007), 30-39 years (16.7%; 18.2% in Qrt 4 2008; 31.7% in Qrt 4 2007; and 60-65 years (13.9%; 8.1% in Qrt 4 2008; 13.6% in Qrt 4 2007).

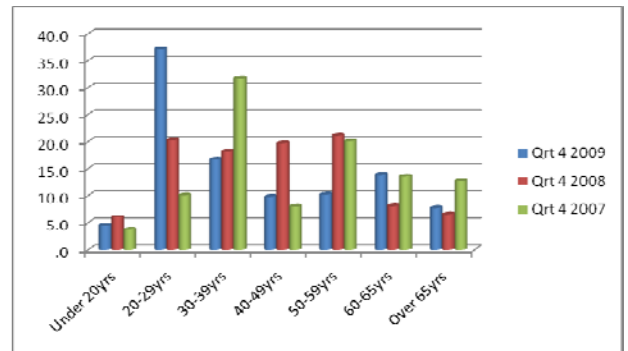


Figure 2: Age of respondents (%)

Travel party

Respondents mainly travelled as a couple (45.3%; 40.3% in Qrt 4 2008; 43.7% in Qrt 4 2007), followed by friends (17.6%; 12.2% in Qrt 4 2008; 10.3% in Qrt 4 2007), alone (16.8%; 21.8% in Qrt 4 2008; 16.8% in Qrt 4 2007), as a family with children (10.2%; 14.0% in Qrt 4 2008; 13.6% in Qrt 4 2007), with relatives (7.0%; 5.1% in Qrt 4 2008; 7.7% in Qrt 4 2007) or as part of a tour group (3.1%; 6.6% in Qrt 4 2008; 8.0% in Qrt 4 2007).

Previous visits and length of stay

77.2% of respondents said this was their first visit to Tropical North Queensland (53.3% in Qrt 4 2008; 71.7% in Qrt 4 2007). Only 34.6% of domestic visitors were first time visitors, while 88.2% of international visitors were first time visitors to the region.

Overall, 22.7% of respondents were repeat visitors (46.7% in Qrt 4 2008; 28.3% in Qrt 4 2007) who had visited TNQ 2-3 times before.

The overall average length of stay in the region was 9.54 nights, compared with 7.26 in Qrt 4 2008 and 6.51 nights in Qrt 4 2007. Table 1 summarises where visitors spend most nights.

Table 1: Place where visitors spent most nights

(%)	Qrt 4 2009
Cairns	67.2
Port Douglas	16.6
Other	8.3
Palm Cove	4.0
Mission Beach	2.0

Yungaburra	1.6
Cape Tribulation	0.4

Accommodation

Table 2 below outlines the main types of accommodation used by respondents.

Table 2: Accommodation used by respondents

(%)	Qrt 4 2009	Qrt 4 2008	Qrt 4 2007
Hotels/Motels	26.6	40.2	40.3
Holiday apartments	16.1	20.6	16.1
Resorts	16.9	17.5	17.9
Backpacker hostels	29.4	6.4	14.3
Friends and relatives	3.2	9.8	6.9
Caravan park/cabins	4.4	3.7	4.5
Camping	1.6	1.2	0.0
B&B	1.6	0.6	0.0

Information

Table 3 outlines the most common sources of information used by visitors.

Table 3: Information sources used by respondents

(%)	Qrt 4 2009	Qrt 4 2008	Qrt 4 2007
Friends and family	42.6	32.3	42.8
Internet	28.5	29.1	31.9
Tourist guide books	33.2	22.8	33.6
Travel agents	17.2	16.9	25.7
Been before	12.5	27.0	15.9
TV documentaries	7.4	5.3	9.7
Visitor centres	2.7	3.6	3.2
Ads print	2.3	3.6	6.5
Ads on the TV/radio	0.4	3.3	2.7
Facebook	1.6	0.0	0.0
Other	2.7	7.7	3.2

Motivations

The mean, measured on a scale of 1 ('not at all important') to 5 ('very important') of motivations for visiting the region are listed in Table 4.

Overall, the top five motives for Qrt 4 2008 were similar to those in Qrt 4 2007. These were:

- Visit the GBR (4.47; 4.05 in Qrt 4 2008; 4.36 in Qrt 4 2007);

- See Australian wildlife (4.02; 3.51 in Qrt 4 2008; 4.05 in Qrt 4 2007);
- Rest & relax (3.95; 4.09 in Qrt 4 2008; 3.89 in Qrt 4 2007);
- Experience natural environment (3.91; 3.81 in Qrt 4 2008; 3.91 in Qrt 4 2007);
- Visit the rainforest (3.89; 3.72 in Qrt 4 2008; 4.09 in Qrt 4 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 resting and relaxing (4.31) and visiting the Great Barrier Reef (3.85), while international visitors were most motivated by visiting the Great Barrier Reef (4.61), seeing Australian wildlife (4.13) and experiencing the natural environment (3.93).

Table 4: Motivations for travelling to the region

Motivations	Mean		
	Overall	Dom	Int'l
Visit the Great Barrier Reef	4.47	3.85	4.61
See Australian wildlife	4.02	3.51	4.13
Rest and relaxation	3.95	4.31	3.87
Experience the natural environment	3.91	3.82	3.93
Visit the Wet Tropics rainforest	3.89	3.84	3.90
Snorkelling and diving	3.85	3.56	2.92
Climate	3.72	3.84	3.69
Visit a World Heritage area	3.45	3.18	3.51
Visit the beaches	3.45	3.32	3.48
Price matched my budget	3.43	3.53	3.41

Last holiday and alternative destinations

The most popular (single) destinations given in response to "where did you spend your last holiday?" were the USA (8.2%), UK (5.8%), Spain (4.7%), France (4.7%), New Zealand (3.5%) and Thailand (3.1%).

Respondents were also asked to list up to 3 alternative destinations considered for this trip. The most popular alternative destinations considered when planning this trip included

New Zealand (21.4%), Sydney (20.2%), Melbourne (14.4%), USA (12.5%) and Fiji (5.4%).

Visits to the rainforest

Overall, the majority of respondents, 72.5% visited the Wet Tropics rainforest during their holiday in TNQ this quarter, compared with 65.0% of respondents in the same quarter in 2008 or 80.2% in 2007.

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

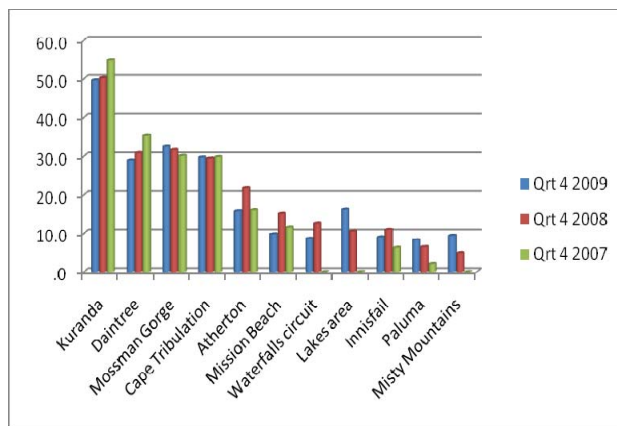


Figure 3: Rainforest locations visited

Respondents who had not visited the rainforest during their holiday (27.5% of respondents) mainly said there was 'not enough time' (19.1%).

Rainforest activities

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

Table 5: Interest in rainforest activities

Rainforest activities	%		
	Overall	Dom	Int'l
Walking	53.9	55.8%	53.4%
Viewing wildlife	46.9	44.2%	47.5%
General relaxation	41.0	46.2%	39.7%
Film/Photography	32.8	34.6%	32.4%
Guided tour	32.4	34.6%	31.9%
Viewing scenery	30.1	38.5%	27.9%
Socialisation	30.1	34.6%	28.9%
Swimming	29.7	36.5%	27.9%
Hiking	21.9	23.1%	21.6%
Visiting information centres	21.1	11.5%	23.5%
Rafting	17.2	11.5%	18.6%
Bike riding	12.5	5.8%	14.2%
Bird watching	12.5	11.5%	12.7%
4WD	9.8	15.4%	8.3%
Reading site interpretation	9.0	5.8%	9.8%
Camping	5.1	1.9%	5.9%

Visits to the GBR

84.4% of respondents visited the GBR on their trip to the region, compared with only 63.0% of respondents during the same quarter in 2008 or 74.8% in 2007. Figure 4 shows the departure sites used to travel to the GBR in Qrt 4 for 2009, 2008 and 2007.

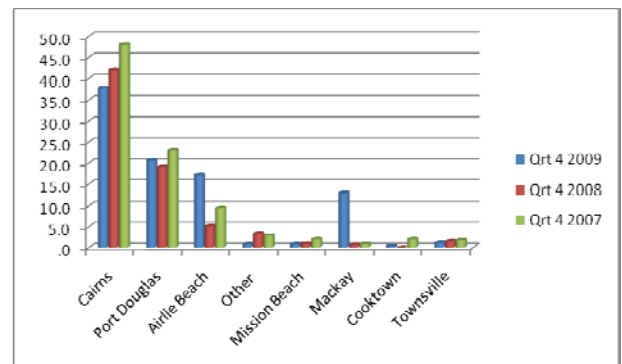


Figure 4: Departure locations for reef trips

Respondents who had not visited the GBR during their holiday (only 15.5% of respondents) gave the following reasons – ‘been before’ (7.4%), ‘no time’ (7.4%) and ‘no money’ (5.5%).

Reef activities

Snorkelling and swimming were the most popular reef activities for respondents (Table 6).

Table 6: Interest in reef activities

Reef activities	%		
	Overall	Dom	Int'l
Snorkelling	52.3	40.4%	55.4%
Swimming	46.9	34.6%	50.0%
Glass bottom boat/semi-sub	19.5	9.6%	22.1%
Viewing marine animals	25.4	13.5%	28.4%
Visiting the islands	14.8	7.7%	16.7%
Sailing	33.6	17.3%	37.7%
Certified scuba diving	33.6	30.8%	34.3%
Resort/uncertified scuba diving	9.8	7.7%	10.3%
Diver training course	7.8	7.7%	7.8%
Helicopter flight	30.5	28.8%	30.9%
Overnight cruise	7.0	5.8%	7.4%
Marine biologist tour	7.8	3.8%	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; see Table 7).

Table 7: Satisfaction with service quality

Service quality aspects	Mean		
	Overall	Dom	Int'l
Friendly accommodation staff	4.23	4.32	4.22
Accom - value for money	3.98	4.20	3.94
Accom - service standard	4.02	4.28	3.97
Tour guides were informative	4.07	4.18	4.04
Tours – value for money	3.82	4.00	3.78
Tour service standards	4.04	4.15	4.02
Tours were on-time	4.15	4.03	4.18
Attractions - value for money	3.94	4.17	3.89
Restaurant staff were efficient	3.88	4.12	3.83
Restaurant - value for money	3.43	3.76	3.36
Restaurant menu selections	3.66	3.92	3.61
Shopping was good	3.51	3.51	3.51
Variety of shopping	3.50	3.54	3.49
Shop closing times	3.37	3.61	3.32
Public transport was accessible	3.51	3.56	3.50
On-time public transport	3.53	3.29	3.58
Visitor information was accurate	3.99	3.89	4.01
Visitor info was accessible	4.12	4.05	4.13
Felt safe/secure moving around	4.36	4.44	4.35

Locations driven through in region

Figure 5 compares the main locations that respondents drove through in Qrt 4 2009, 2008 and 2007.

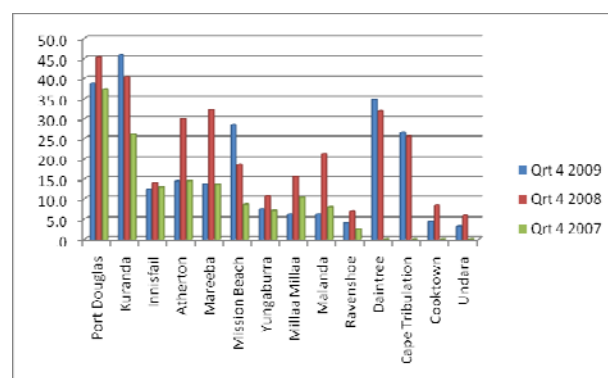


Figure 5: Locations travelled to by respondents

Table 8 illustrates the locations in TNQ visited in Qrt 4 2008 by domestic and international respondents.

Table 8: Locations in TNQ travelled to

Locations	%		
	Overall	Dom	Int'l
Port Douglas	38.7	44.2	37.3
Kuranda	45.7	36.5	48.0
Innisfail	12.5	5.8	14.2
Atherton	14.5	13.5	14.7
Mareeba	13.7	25.0	10.8
Mission Beach	28.5	23.1	29.9
Yungaburra	7.4	3.8	8.3
Millaa Millaa	6.3	1.9	7.4
Malanda	6.3	5.8	6.4
Ravenshoe	3.9	1.9	4.4
Daintree	34.8	32.7	35.3
Cape Tribulation	26.6	28.8	26.0
Cooktown	4.3	3.8	4.4
Undara	3.1	5.8	2.5

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 8.58, compared with a mean value of 8.44 in Qrt 4 2008 or 8.50 in 2007. For international visitors the overall mean was 8.51, and for domestics the mean was 8.93. Moreover, 96.5% of respondents would recommend the region to prospective visitors.

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