

RAINFOREST TOURISM

QUARTERLY REPORT # 3: RAINFOREST 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 (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 2009**. Overall, a total of **297 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 2009) with the corresponding quarters in 2008 and 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 visitor surveys collected by tour operators, tourist attractions and the project research team.

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



3. SAMPLE AND LIMITATIONS

A total of 297 valid surveys were collected from visitors throughout the Wet Tropics rainforest. During this period, limitations included the overall drop in visitor numbers to the region during this period, as well as weather constraints making it difficult to travel to some on-site surveying rainforest sites. Additionally, the surveys were only conducted 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 59.0% females and 41.0% males. This differed from Q3 2008 where 45.8% of respondents were female and 54.2% were male.

Figure 1 illustrates that survey respondents originated from both Australia (54.8%, 69.5% in 2008 and 63.5% in 2007) and overseas (45.2%, 30.5% in 2008 and 36.5% in 2007).

International visitors were mainly from the UK and Ireland (15.9%, 10.2% in 2008 and 10.3% in 2007) and Europe (12.4%, 6.0% in 2008 and 7.4% in 2007).

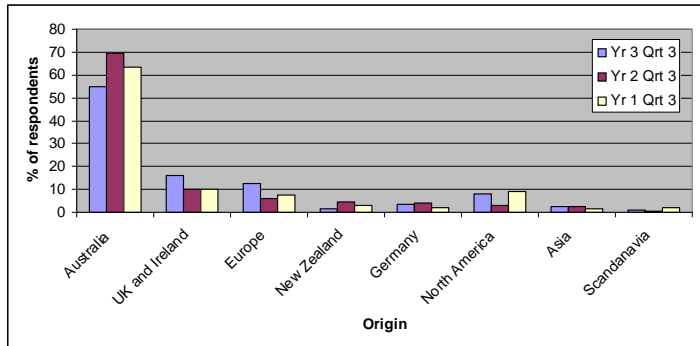


Figure 1: Origin of respondents, Q3 2007-2009.

Occupation

The major occupation groups of respondents were:

- **Professionals** (31.4%, 24.4% in 2008 and 30.9% in 2007);
- **Retirees/semi-retirees** (18.6%, 18.3% in 2008 and 16.5% in 2007);
- **Students** (11.5%, 5.7% in 2008 and 10.0% in 2007);
- **Self-employees** (8.4%, 14.9% in 2008 and 7.6% in 2007) and;
- **Managers** (7.4%, 9.2% in 2008 and 6.5% in 2007).

Age of Respondents

As shown in Figure 2, the most popular age group of respondents was 50-59 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 1931 and maximum of 1989).

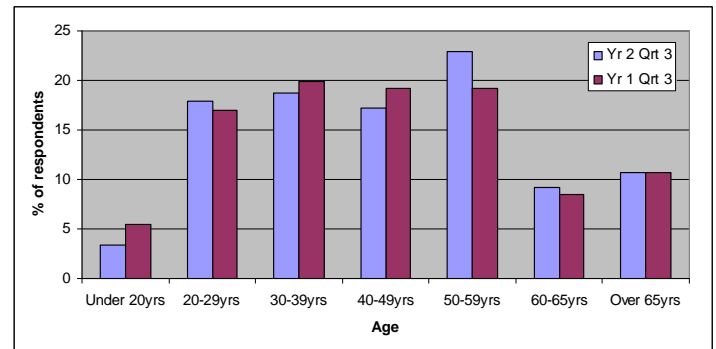


Figure 2: Age of respondents, Q3 2007-2009.

Travel Party

The composition of travel parties were:

- **Couples** (44.6%, 58.2% in 2008 and 51.8% in 2007);
- **With friends** (24.7%, 9.6% in 2008 and 11.1% in 2007);
- **Family with children** (13.5%, 12.6% in 2008 and 20.4% in 2007);
- **Alone** (3.4%, 3.8% in 2008 and 4.8% in 2007);
- **With relatives** (9.5%, 8.8% in 2008 and 6.3% in 2007);
- **As part of a tour group** (4.1%, 6.9% in 2008 and 5.6% in 2007) and;
- **With a club** (only 0.3% in 2009).

Accommodation and Transport

Table 1 illustrates the most popular accommodation types used by respondents.

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

Type	Q3 2009	Q3 2008	Q3 2007
Hotels / motels	18.5	22.1	21.4
Apartments	22.9	21.3	20.1
Resorts	15.4	31.4	23.8
Backpackers'	9.6	3.5	10.0
Friends / family	2.4	5.4	2.6
Caravan park	15.1	9.3	12.2
Camping	14.7	5.4	6.3
Bed 'n' breakfast	1.4	1.6	3.5

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: Mode of transport used by respondents, Q3 2007-2009 (%)

Type	Q3 2009	Q3 2008	Q3 2007
Air	32.7	39.3	39.2
Rented car	32.3	29.4	32.2
Bus / coach	5.8	7.3	7.0
Private vehicle	20.7	16.8	17.6
Rented van	7.1	2.7	3.1
Other	1.0	2.3	0.2
Cruise boat	0.0	0.0	0.0
Rail	0.3	1.5	0.7

Previous visits and length of stay

62.4% of respondents indicated that this was their first visit to Tropical North Queensland (58.5% in 2008 and 64.9% in 2007). Those who had visited in the past had visited between one and three times (91.0% compared with 78.11% in 2008).

The overall average length of stay was 11.33 nights, which was an increase on Q3 2008 average of 8.52 nights and the Q3 2007 average of 9.94 nights.

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	38.4	44.7	42.1
Internet / WWW	30.6	28.6	32.5
Guide books	35.4	26.0	32.5
Travel agents	13.5	10.3	14.1
Have been before	21.5	23.3	23.0
TV documentaries	7.7	10.7	11.1
Other	3.7	4.2	3.7
Ads in print	4.0	5.7	7.8
Visitor centres	9.1	6.9	5.6
Ads on television / radio	1.7	3.8	3.5

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. For domestic visitors, resting and relaxing was the key motivator for visiting the region (4.34 and 4.28 in 2008) followed by visiting the rainforest (4.31, 4.26 in 2008), whereas visiting the reef (4.51 and 4.57 in 2008) and seeing Australian wildlife (4.34 and 4.32 in 2008) were major drawcards for internationals to the region.

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

Motivation	Mean (Scale 1 to 5)		
	Overall	Domest.	Intern.
Visit the rainforest	4.30	4.31	4.29
Visit the GBR	4.26	4.05	4.51
Experience the environment	4.19	4.21	4.16
Rest and relaxation	4.14	4.34	3.94
Walk in the rainforest	4.05	4.09	4.02
See Australian wildlife	4.05	3.78	4.34
Climate	3.96	4.01	3.92
Visit a World Heritage area	3.87	3.87	3.87
Visit beaches	3.85	3.73	4.01
Snorkelling and diving	3.69	3.36	4.04

Rainforest locations visited

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

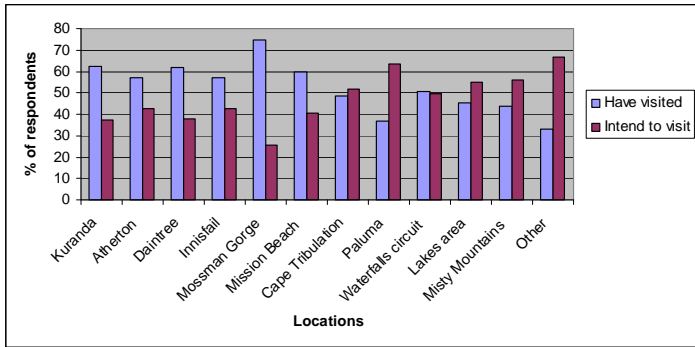


Figure 3: Rainforest locations visited and intended to visit, Q3 2009.

Figure 4 compares the rainforest locations visited by respondents in Q3 in 2007, 2008 and 2009.

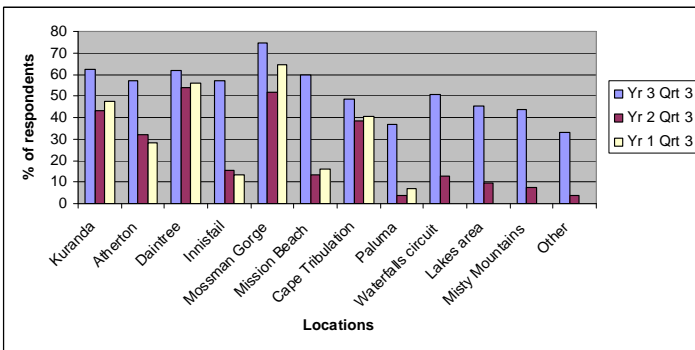


Figure 4: Rainforest locations visited, Q3 2007-2009.

Time spent at rainforest locations

Visitors tended to spend:

- Less than ½ day at Daintree, Mossman Gorge, the Innisfail region, Mission Beach region, Paluma, the Lakes area, the Waterfall circuit and Misty Mountains.
- Half to one day travelling around Kuranda, Atherton and Cape Tribulation.
- More than one day travelling around other rainforest locations.

The importance of visiting rainforests

Visiting the rainforest was considered fairly important to respondents with a mean of 4.14, (where 1 = not at all important, and 5 = very important). This was a slightly lower mean value than Q3 2008 where the mean was 4.18, and Q3 2007 where the mean was 4.36.

Similarly, visiting national parks while on holidays was also fairly important (mean=4.02), a very comparable mean from Q3 2008 of 3.87 and Q3 2007 of 3.96.

World Heritage rainforest knowledge

Overall, 71.2% of respondents were aware that these rainforests were designated World Heritage Areas before they visited the region compared with 68.3% of respondents in 2008 and 68.1% of respondents in 2007. 84.5% (80.8% in 2008) of domestic visitors and 56.3% (38.7% in 2008) of international visitors were aware of the World Heritage designation.

When asked if they would still visit the region if the rainforests were not designated World Heritage Area, the majority of respondents responded 'Yes' (97.5% compared with 98.4% of respondents in Qrt 3 2008 and 89.5% of respondents in Qrt 3 2007), with only 2.5% of respondents who responded 'No'.

Environmental and cultural interpretation

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

Table 5: Interpretation of rainforest sites, Q3 2009.

The environmental information...	Mean
Was interesting and clear	4.33
Influenced my behaviour at the site	3.83
Helped me to understand the ecological processes of this site	4.23
Influenced my attitude towards environmental conservation	3.89
The cultural information...	Mean
Was interesting and clear	4.00
Influenced my behaviour at the site	3.69
Helped me to understand the cultural significance of this site	3.93
Influenced my attitude towards cultural respect	3.82

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 6.

Table 8: Respondents' interest in rainforest activities, Q3 2009.

Activity	Percentage		
	Overall	Domest.	Intern.
Viewing scenery	75.9	77.4	74.0
Viewing wildlife	62.1	56.6	68.7
Walking	80.0	78.6	81.7
Filming / photography	60.3	55.3	66.4
Swimming	39.7	37.1	42.7
Guided tour	27.2	25.2	29.8
Visiting information centres	42.8	39.6	46.6
General rest and relaxation	51.4	52.8	49.6
Hiking	28.3	29.6	26.7
Bird watching	29.3	25.8	33.6
Socialising	25.9	25.8	26.0
Reading site interpretation materials	30.7	30.2	31.3
Four-wheel driving	14.8	13.8	16.0
Camping	17.6	14.5	21.4
Bike riding	6.6	8.2	4.6
Rafting	7.9	6.3	9.9

Overall visitor satisfaction

Respondents were largely satisfied (mean = 8.24) with their rainforest visits during their holiday in the region (on a scale where 1 = *very unsatisfactory*, and 10 = *very satisfactory*). This mean value was slightly less than Q3 2008 with an overall satisfaction of 8.57, and Q3 2007 with an overall satisfaction of 8.63.

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