

# Centre for Tropical Tourism Studies

## TOURISM

### QUARTERLY REPORT #4: RAINFOREST SURVEY

#### TNQ Region

October – December 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 rainforest tourism in the Wet Tropics rainforest. The data presented in this report summarise the results from the **fourth quarter** (Qrt) of data collection in the Tropical North Queensland (TNQ) region from **October to December 2009**. Overall, a total of **244 surveys** were returned for this quarter from rainforest locations. The results include socio-demographic characteristics, travel behaviour, alternative destinations considered, motivations and planning, rainforest activities, and environmental and cultural interpretation. This report compares the current quarter (October – December 2009) with the corresponding quarter in 2008.



## 1. INTRODUCTION

MTRSF Project 4.9.2 *Sustainable Nature-based Tourism: Planning and Management* aims to identify major issues relating to visitor motivations and behaviours for visiting the Wet Tropics, and 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 extent, knowledge about visitor activities.*



## 2. METHODOLOGY

The methodology used in this research was based on structured visitor surveys collected by tour operators, tourist attractions and the MTRSF funded project research team throughout the region. 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. Findings for the October to December quarter are compared with the October to December period in 2008.

**Table 1: Survey locations and sample size, Qrt 4 2009**

Location	Sample size
Northern	176
Cairns/Kuranda	40
Atherton Tablelands	28
<b>Total</b>	<b>244</b>



## 3. LIMITATIONS

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. The current global economic downturn will also have an effect on this period. 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

The sample consisted of 57.3% females and 42.7% males. The results for this quarter differed considerably from Qrt 4 2008 where 47.7% of respondents were female and 52.3% were male. Figure 1 shows that 45.1% of respondents were from Australia (72.2% in Qrt 4 2008) and 51.6% were from overseas (27.8% in Qrt 4 2008). International visitors were mainly from the UK and Ireland (21.7%; 13.5% in Qrt 4 2008) and Europe (11.2%; 7.9% in Qrt 4 2008).

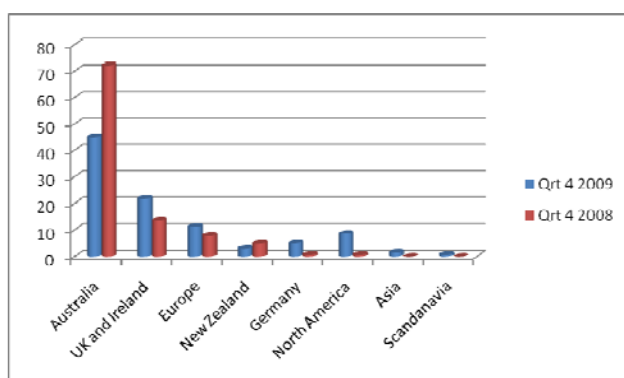


Figure 1: Origin of respondents, Qrt 4 2009 & 2008

### Occupation

The occupations of respondents were:

- Professionals (37.7% 19.7%; in Qrt 4 2008);
- Retirees/semi-retirees (11.3%; 19.5% in Qrt 4 2008);
- Self-employees (10.5%; 11.0% in Qrt 4 2008);
- Public servants (9.6; 9.4% in Qrt 4 2008) and;
- Managers (6.3; 7.0% in Qrt 4 2008).
- Tradespersons (4.2%; 10.9% in Qrt 4 2008);

### Age

As seen in Figure 2, the largest age group of respondents was 30-39 years (25.9%) in Qtr 4. This is slightly different for the same quarter the year before where the age group of 20-29 was the most dominant. The second largest group was the 20-29 years age group accounting for 25% of respondents (20.6% in Qtr 4 2008). For this quarter respondents were born between 1928 and 1990.

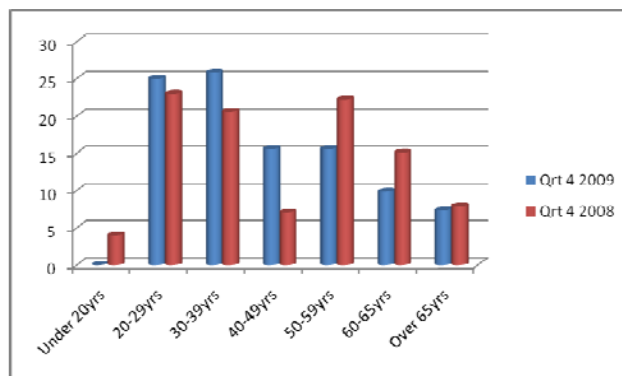


Figure 2: Age of respondents, Qrt 4 2008 & 2009

### Travel party

Respondents' travel party composition was:

- Couples (50.4%; 58.6% in Qrt 4 2008);
- With friends (16.8%; 10.2% in Qrt 4 2008);
- With relatives (13.1%; 5.5% in Qrt 4 2008);
- Family with children (7.0%; 11.7% in Qrt 4 2008);
- Alone (7%; 6.2% in Qrt 4 2008) and;
- Part of a tour group (5.7%; 7.8% in Qrt 4 2008).

### Previous visits and length of stay

69.7% of respondents indicated that this was their first visit to Tropical North Queensland (compared with 57.0% in Qrt 4 2008). Those who had visited in the past had visited between one and three times (90.3%).

The overall average length of stay was 5.41 nights, which was a large increase on the Qrt 4 2008 average of 7.57 nights.

### Accommodation and transport

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

Table 2: Accommodation used by respondents, Qrt 4 2009 & 2008

	Qrt 4 2009 (%)	Qrt 4 2008 (%)
Hotels/Motels	25.5	11.3
Holiday apartments	25.9	21.0
Resorts	20.2	33.6
Backpacker hostels	9.6	11.7
Friends and relatives	4.2	10.9
Caravan park/cabins	9.2	4.7
Camping	4.6	0.0
B&B	0.8	4.7

Table 3 shows the types of transport used by respondents to travel to and around the region.

**Table 3: Transport used by respondents, Qrt 4 2009 & 2008**

	Qrt 4 2009 (%)	Qrt 4 2008 (%)
Rented car	32.0	27.8
Air	31.6	54.0
Private vehicle	17.2	10.3
Bus/coach	12.3	0.8
Rented campervan	6.1	1.6
Other	0.0	0.8
Cruise boat	0.4	0.0
Rail	0.4	4.7

### Information sources

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

**Table 4: Information sources used by respondents, Qrt 4 2008 & 2007**

	Qrt 4 2009 (%)	Qrt 4 2008 (%)
Friends and family	43.0	35.9
Tourist guide books	32.4	14.8
Internet	27.5	28.1
Been before	20.1	25.0
Travel agents	15.6	10.2
Ads print	7.0	7.8
TV documentaries	5.7	8.6
Ads on the TV/radio	5.3	1.6
Visitor centres	4.9	6.2
Other	4.1	7.0

### Motivations for 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 Qrt 4 2009 were:

- Visit the GBR (4.37; 4.42 in Qrt 4 2008);
- Visit the rainforest (4.24; 4.24 in Qrt 4 2008);
- Experience the natural environment (4.11; 4.07 in Qrt 4 2008);
- See Australian wildlife (3.99; 3.98 in Qtr 4 2008) and;
- Rest & relax (3.98; 4.29 in Qrt 4 2008).

For domestic visitors, resting and relaxing was the key motivator for visiting the region (4.32) followed by visiting the rainforest (4.24). Visiting the reef (4.62) and seeing Australian wildlife

(4.32) were major drawcards for international to visitors.

**Table 5: Top 10 motivations for travelling to the region, Qrt 4 2009**

Motivation	Mean		
	Overall	Dom	Int'l
Visit GBR	4.37	4.08	4.62
Rest and relax	3.98	4.32	3.72
Visit the rainforest	4.24	4.26	4.25
Experience the natural environment	4.11	4.12	4.10
Walk in the rainforest	4.10	4.11	4.13
See Australian wildlife	3.99	3.61	4.32
Visit a World Heritage area	3.71	3.82	3.65
Visit the islands	3.42	3.30	3.52
Climate	3.55	3.55	3.54
Snorkelling and diving	3.74	3.34	4.10

### Last holiday and alternative destinations

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

- North America (8.6%);
- UK (5.7%);
- Melbourne (4.9%);
- Spain (4.9%);
- Caribbean and Central America (4.4%);
- France (4.5%);
- Tasmania (4.1%)
- Gold Coast (3.3%)
- South Pacific (2.8%)and;
- Thailand (2.5%);

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

- New Zealand (12.3%);
- Sydney (9.5%);
- USA (6.4%);
- Northern Territory (6.4%);
- Fiji (4.9%);
- Thailand (4.9%);
- Whitsundays (3.2%);
- Bali (2.8%);
- Caribbean and Central America (2.0%) and;
- South America (1.6%).

### Rainforest locations visited

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

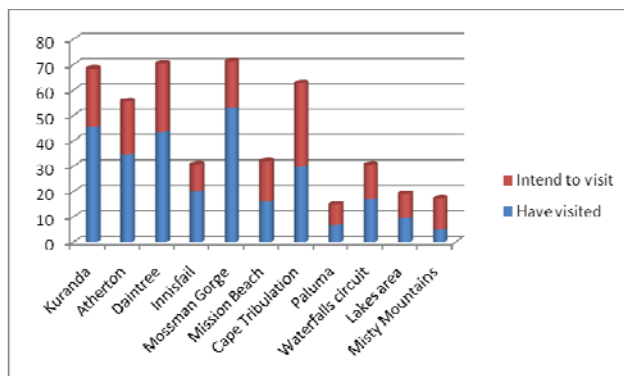


Figure 3: Rainforest locations visited and intended to visit, Qrt 4 2009

Figure 4 compares the rainforest locations visited by respondents in Qrt 4 in 2009 and 2008.

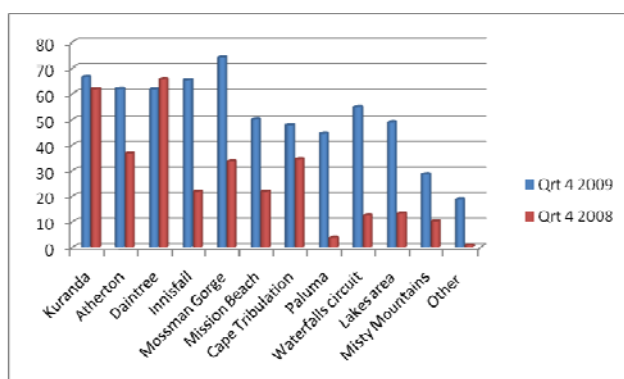


Figure 4: Rainforest locations visited, Qrt 4 2009 & 2008

Domestic and international visitors showed significant differences in rainforest location visitation patterns as shown in Table 6.

Table 6: Comparing rainforest locations visited and visitor origin, Qrt 4 2009

Location	Dom (%)	Int'l (%)
Daintree	55.6	66.3
Mossman Gorge	74.7	74.2
Kuranda	69.9	63.4
Atherton	67.6	55.4
Cape Tribulation	40.0	53.5
Mission Beach	56.7	46.8
Innisfail	69.2	62.9
Paluma	33.3	58.8

Lakes area	45.5	54.2
Waterfalls circuit	48.6	61.5
Misty Mountains	27.3	31.6

### Time spent at rainforest locations

Visitors tended to spend:

- Less than ½ day at Mossman Gorge (72.4%), Innisfail (45.8%), Cape Tribulation (39.2%), Mission Beach (20.4%), Waterfall circuit (42.6%) and Misty Mountains (50%);
- Half to 1 day in Kuranda (56.2%), Waterfall circuit (46.3), Lakes area (45.8%), and Cape Tribulation (40.8%)and;
- Greater than 1 day at Mission Beach (44.9%)

### Importance of visiting rainforests

Visiting the rainforest was considered important to respondents (mean=4.06) on a scale of 1 ('not at all important') to 5 ('very important'). This was a slightly higher mean value than Qrt 4 2008 when the mean was 4.12.

Similarly, visiting national parks while on holidays was also important (mean=3.82), slightly lower than the mean from Qrt 4 2008 (3.90%).

### World Heritage rainforest knowledge

Overall, 59.8% of respondents were aware that the Wet Tropics rainforest was a designated World Heritage Area before they visited compared with 55.5% of respondents in Qrt 4 2008. 76.1% of domestic visitors and only 47.6% 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, almost all of the respondents said 'yes' (99.1% compared with 93.9% of respondents in Qrt 4 2008), with only 0.9% of respondents who said 'no' (6.1% in Qrt 4 2008).

### The condition of the natural environment

Respondents were asked how they considered the condition of the natural environment of the Wet Tropics rainforest. Measured on a scale of 1 ('very unsatisfied') to 5 ('highly satisfied'), respondents gave a mean of 4.12.

### *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 (see Table 7).

**Table 7: Interpretation at sites, Qrt 4 2009**

The environmental information...	Mean
Was interesting and clear	4.24
Influenced my site behaviour	3.75
Helped me to understand the ecological processes of this site	4.07
Influenced my attitude towards environmental conservation	3.75
The cultural information...	Mean
Was interesting and clear	3.93
Influenced my site behaviour	3.58
Helped me to understand the cultural significance of this site	3.81
Influenced my attitude towards cultural respect	3.66

Generally, visitors agreed that the interpretation was interesting and clear, but that it did not significantly influence their site behaviour or attitudes.

### *Rainforest activities*

Walking in the rainforest was the most popular rainforest activity for visitors, as indicated in Table 8.

**Table 8: Interest in rainforest activities, Qrt 4 2009**

Rainforest activities	%		
	Overall	Dom	Int'l
Walking	82.8	80.0	87.5
Film/Photography	71.6	66.4	77.3
Viewing scenery	68.7	72.7	66.4
Viewing wildlife	66.7	61.8	71.9
General relaxation	54.7	60.0	49.2
Swimming	43.2	43.6	43.8
Guided tour	41.6	35.5	46.9
Hiking	39.5	32.7	46.1
Visiting information centres	36.2	30.9	40.6
Reading site interpretation	32.4	31.8	36.7
Socialisation	31.3	34.5	28.9
Bird watching	26.3	23.6	28.9
4WD	14.4	7.3	20.3
Camping	8.6	5.5	11.7
Bike riding	8.6	7.3	10.2
Rafting	7.8	8.2	7.8

### *Overall satisfaction*

Respondents were largely satisfied (mean=8.29) with their visit to the rainforest and region during their holiday, using a scale of 1 ('very unsatisfactory') to 10 ('very satisfactory'). Domestic visitors were particularly satisfied with a mean of 8.32, compared to internationals with a relatively lower mean of 8.29. Overall, the mean value was slightly less than Qrt 4 2008 with an overall satisfaction of 8.29.

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