

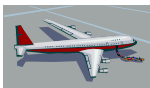
## TOURISM

### QUARTERLY REPORT #2: AIRPORT EXIT SURVEY

#### TNQ Region

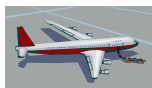
#### April – June 2010

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 **April to June 2010**. Overall, a total of **372 surveys** were returned for this quarter from the Domestic terminal of the **Cairns Airport**. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, reef and rainforest experiences, and service quality. This report compares the findings from Quarters 2 in 2007, 2008 and 2009.



### 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 to 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.*



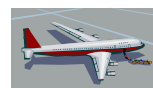
### 2. METHODOLOGY

The principle methodology for this research was visitor surveys distributed by the MTRSF funded 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, Great Barrier

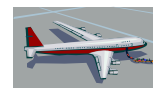
Reef islands and Alice Springs/Uluru in Central Australia.

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 372 valid surveys were collected from domestic and international visitors at the Cairns Airport during this survey period. The survey was distributed only in English.



### 4. FINDINGS

#### *Gender and origin of respondents*

The sample consisted of 372 respondents of whom 58.6% were females (61.4% in Qrt 2 2009, 55.0% in Qrt 2 2008 and 57.2% in Qrt 2 2007) and 41.4% were males (38.6% in 2009, 45.0% in 2008 and 42.8% in 2007). Figure 1 illustrates that visitors were mainly from Australia (40.8%, 47.7% in 2009,

44.3% in 2008 and 42.8% in 2007), the UK & Ireland (19.5%, 15.4% in 2009, 16.1% in 2008 and 17.3% in 2007) and North America (10.4%, 14.9% in 2009, 13.5% in 2008 and 18.5% in 2007).

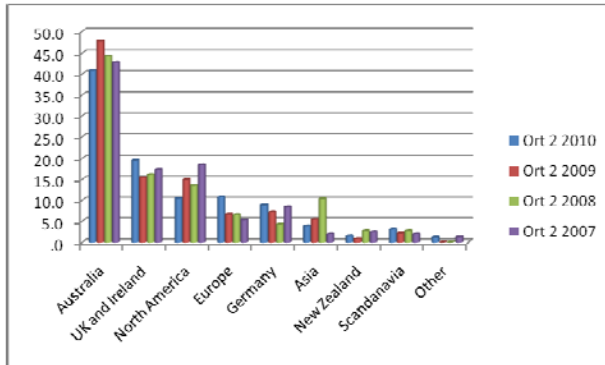


Figure 1: Origin of respondents, 2007-2010

### Occupation

*The occupations of respondents were:*

- Professional (27.6%; 21.3% in 2009, 21.7% in 2008 and 17.9% in 2007);
- Student (24.9%; 20.9% in 2009, 15.4% in 2008 and 21.8% in 2007);
- Retired/semi-retired (10.3%; 10.7% in 2009, 13.8% in 2008 and 18.4% in 2007);
- Self-employed (7.8%; 10.7% in 2009, 9.6% in 2008 and 7.7% in 2007);
- Management (5.4%; 7.5% in 2009, 7.9% in 2008 and 6.5% in 2007) and;
- Office-clerical (4.9%; 9.5% in 2009, 8.4% in 2008 and 4.8% in 2007).

### Age of respondents

As shown in Figure 2, the most popular age group of respondents was 20-29 years (41.0%, 34.6% in 2009, 32.3% in 2008 and 32.0% in 2007).

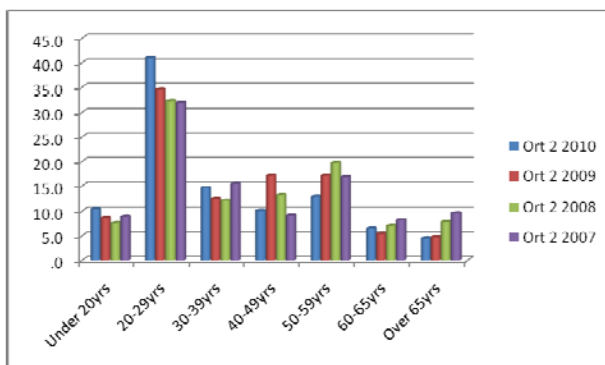


Figure 2: Age of respondents, 2007-2010

### Travel party

Respondents mainly travelled as a couple (38.5%, 39.5% in 2009, 47.6% in 2008 and 39.6% in 2007), followed by friends (24.3%, 20.2% in 2009, 16.7% in 2008 and 12.8% in 2007), alone (17.9%; 12.8% in 2009, 13.9% in 2008 and 17.6% in 2007), as a family with children (8.6%; 18.6% in 2009, 9.5% in 2008 and 12.8% in 2007), with relatives (6.7%; 3.9% in 2009, 6.3% in 2008 and 6.5% in 2007), as part of a tour group (3.5%; 4.3% in 2009, 5.6% in 2008 and 10.6% in 2007), or as a member of a club (0.5%; 0.8% in 2009, 0.5% in 2008 and 0% in 2007).

### Previous visits and length of stay

59.6% of respondents said this was their first visit to Tropical North Queensland (64.6% in 2009, 70.0% in 2008). Only 21.3% of domestic visitors were first time visitors (40.0% in 2009, 43.7% in 2008), while 86.7% of international visitors were first time visitors to the region (86.4% in 2009, 90.0% in 2008).

Overall, 40.4% of respondents were repeat visitors (35.4% in 2009, 30.0% in 2008 and 32.8% in 2007). A large proportion of repeat visitors had visited 1-3 times before (84.8%, 91.8% in 2009, over 90% in 2008).

The overall average length of stay in the region was 9.55 nights, compared with 11.36 nights in 2009, 7.87 nights in 2008 and 9.34 nights in 2007.

Table 1: Place where visitors spent most nights

(%)	Ort 2 2010
Cairns	68.1
Port Douglas	14.1
Palm Cove	2.2
Other	12.7
Daintree	0.3
Cape Tribulation	0.6
Mission Beach	1.7

## Accommodation

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

**Table 2: Accommodation used by respondents, 2007-2010**

(%)	Qrt 2 2010	Qrt 2 2009	Qrt 2 2008	Qrt 2 2007
Hotels/Motels	29	24.1	34.6	34.2
Apartments	12.1	23.0	21.0	18.2
Resorts	12.4	19.1	15.2	15.7
Backpackers	29	21.8	19.4	17.2
Friend/relative	7.9	4.3	4.4	9.3
Caravan park	6.2	5.8	3.9	2.0
Camping	3.1	1.9	1.2	3.2
B&B	0.3	0.0	0.2	0.2

## Information

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

**Table 3: Information sources used by respondents, 2007-2010**

(%)	Qrt 2 2010	Qrt 2 2009	Qrt 2 2008	Qrt 2 2007
Friend/family	39.3	44.6	40.0	40.4
Internet	27.5	49.2	31.4	22.8
Guide books	27.8	37.2	28.0	28.1
Travel agents	22.2	32.2	21.2	19.2
Been before	20.1	22.5	20.0	16.3
TV docs	4.8	17.8	5.0	7.0
Visitor centres	4.0	14.7	5.0	4.6
Ads print	2.1	6.2	5.0	4.6
TV/radio ads	2.4	3.5	3.6	4.3
Facebook	1.1	0.0	0.0	0.0
Other	8.0	7.8	5.2	11.8

## 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 six motives for Qrt 2 2010 were:

- Visit the GBR (4.22; 4.45 in 2009);
- Rest & relax (4.05; 4.02 in 2009);

- Climate (3.78; 3.93 in 2009)
- Visit the rainforest (3.76; 4.08 in 2009) and;
- Experience natural environment (3.76; 3.97 in 2009).

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 (4.18; 4.38 in 2009) and the climate (3.72; 3.59 in 2009). While international visitors were also most motivated by visiting the Great Barrier Reef (4.67; 4.68 in 2009), they were also very motivated by snorkelling and diving (4.20; 4.23 in 2009) and seeing Australian wildlife (4.13; 4.25 in 2009).

**Table 4: Motivations for travelling to the region, 2010**

Motivations	Mean		
	Overall	Dom	Int'l
Visit the GBR	4.22	3.47	4.67
Visit the rainforest	3.76	3.49	3.93
Rest & relax	4.05	4.18	3.98
Snorkelling & diving	3.75	3.05	4.20
Experience the natural env't	3.76	3.54	3.89
See Australian wildlife	3.74	3.12	4.13
Climate	3.78	3.72	3.82
Visit beaches	3.60	3.30	3.80
Price matched my budget	3.44	3.35	3.50
Spend time with family	3.03	3.44	2.78

## Visits to the rainforest

Overall, the majority of respondents, 70.9% visited the Wet Tropics rainforest during their holiday in TNQ this quarter, compared with 82.7% of respondents in the same quarter in 2009, 81.0% in 2008, and 78.3% of respondents in 2007.

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

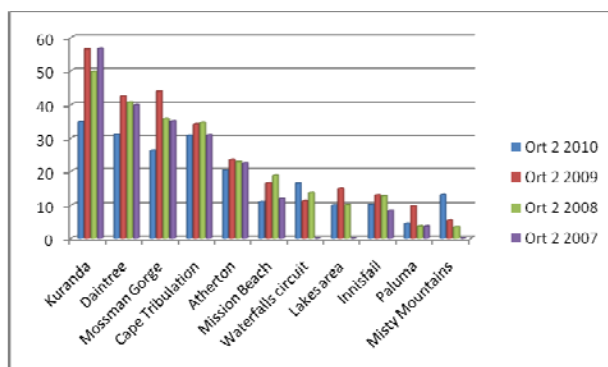


Figure 3: Rainforest locations visited, 2007-2010

Respondents who had not visited the rainforest during their holiday (29.1%, 17.3% of respondents in 2009, and 19.0% in 2008) mainly said there was 'not enough time' (24.9%; 30.1% in 2009, 16.4% in 2008).

### Rainforest activities

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

Table 5: Interest in rainforest activities, 2008-2010

Rainforest activities	%		
	Qrt 2 2010	Qrt 2 2009	Qrt 2 2008
Walking	51.1	70.2	63.9
Viewing scenery	42.0	43.4	57.0
Viewing wildlife	34.8	55.0	47.8
Swimming	27.5	36.4	33.0
General relaxation	34.0	50.4	41.8
Film/Photography	32.9	58.9	40.2
Guided tour	28.9	42.2	38.4
Visiting information centres	19.0	26.4	24.1
Socialisation	18.4	27.5	20.2
Reading site interpretation	11.5	14.0	15.8
Bird watching	12.3	16.7	18.0
Hiking	22.7	35.3	17.5
4WD	10.2	12.0	11.2
Rafting	6.1	14.7	7.5
Camping	14.2	8.5	5.7
Bike riding	3.5	13.2	5.2

### Visits to the GBR

69.9% of respondents visited the GBR on their trip to the region, compared with 82.1% of respondents during the same quarter in 2009, 76.5% in 2008 and 68.9% of respondents in 2007. Figure 4 shows the departure sites used to travel to the GBR in Qrt 2 of 2010, 2009, 2008 and 2007.

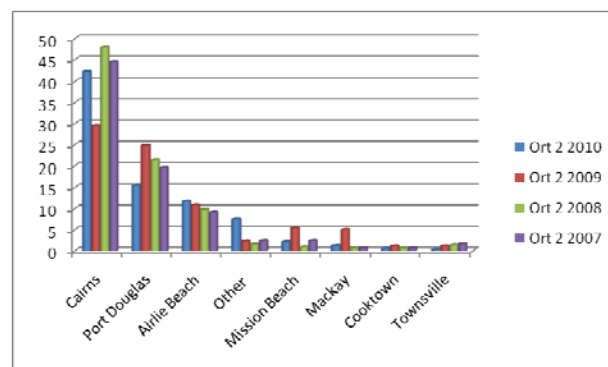


Figure 4: Departure locations for reef trips, 2007-2010

Respondents who had not visited the GBR during their holiday (30.1%, 17.9% of respondents in 2009 and 23.5% of respondents in 2008) gave the following reasons – 'no time' (14.4%, 12.4% in 2009, 11.8% in 2008), 'been before' (9.6%, 5.8% in 2009, 8.2% in 2008) and 'no money' (6.4%, 4.3% in 2009, 4.5% in 2008).

### Reef activities

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

**Table 6: Interest in reef activities, 2008-2010**

Reef activities	%		
	Qrt 2 2010	Qrt 2 2009	Qrt 2 2008
Snorkelling	51.9	64.3	54.8
Swimming	39.8	54.5	42.9
Glass bottom boat/semi-sub	20.1	35.7	36.1
Viewing marine animals	23.3	33.7	31.9
Visiting the islands	17.4	17.8	21.2
Sailing	27.3	18.6	15.4
Certified scuba diving	10.4	14.7	10.7
Resort/uncertified scuba diving	9.4	7.4	8.9
Diver training course	4.8	6.2	5.1
Helicopter flight	4.8	6.2	4.9
Overnight cruise	8.0	6.6	6.5
Marine biologist tour	3.2	7.4	8.2

### 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 Qrt 2 in 2010, 2009 and 2008.

**Table 7: Satisfaction with service quality, 2008-2010**

Service quality aspects	Mean		
	Qrt 2 2010	Qrt 2 2009	Qrt 2 2008
Friendly accommodation staff	4.04	4.24	4.23
Accomm – value for money	3.89	4.06	3.96
Accomm service standard	3.87	4.04	4.24
Tour guides were informative	4.02	4.20	4.40
Tours – value for money	3.73	3.97	4.06
Tour service standards	3.92	4.08	3.99
Tours were on-time	4.05	4.30	4.21
Attractions – value for money	3.77	3.99	3.97
Restaurant staff were efficient	3.68	3.84	3.77
Restaurant – value for money	3.36	3.54	3.42
Restaurant menu selections	3.61	3.72	3.86
Shopping was good	3.55	3.56	3.66
Variety of shopping	3.53	3.51	3.37
Shop closing times	3.36	3.28	3.32
Public transport was accessible	3.37	3.42	3.81
On-time public transport	3.39	3.52	3.78
Visitor information was accurate	3.80	3.98	3.99
Visitor info was accessible	3.92	4.10	4.06
Felt safe/secure moving around	4.27	4.32	4.32

### Locations driven through in the region

Figure 5 compares the main locations that respondents who used private/rented vehicles to drive in the region drove through in Qrt 2 in 2010, 2009, 2008 and 2007.

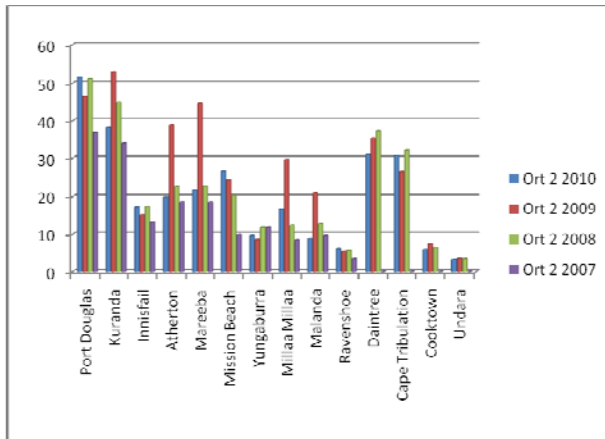


Figure 5: Locations travelled to by respondents, 2007-2010

### 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 8.30 (compared with a mean value of 8.57 in 2009, 8.35 in 2008 and 8.49 in 2007). For international visitors the overall mean was 8.34 (8.57 in 2009, 8.30 in 2008), and for domestics was 8.21 (8.50 in 2009, 8.40 in 2008).

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