

TOURISM

QUARTERLY REPORT #1: RAINFOREST SURVEY

TNQ Region

January – April 2010

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 rainforest. The data presented in this report summarise the results from the **first quarter** (Qrt) of data collection in the Tropical North Queensland (TNQ) region from **January to April 2010**. Overall, a total of **140 surveys** were returned for this quarter from rainforest locations. The 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 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 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 limited extent, knowledge about visitor activities.*



2. METHODOLOGY

The methodology used in this research was visitor surveys collected by tour operators, tourist attractions, the MTSRF funded project research team and at visitor information centres 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 satisfaction.

Table 1: Survey locations and sample size, 2010

Location	Sample
Northern	125
Cairns/Kuranda	15
Atherton Tablelands	0
Total	140



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. 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 50.4% females and 49.6% males. This differed slightly from Qrt 1 2008

where 54.7% of respondents were female and 45.3% were male.

Figure 1 illustrates that survey respondents originated from both Australia (48.9%, 48.0% in 2009, 59.3% in 2008 and 55.4% in 2007) and overseas (51.2%, 52.0% in 2009, 40.7% in 2008 and 44.6% in 2007).

International visitors were mainly from Europe (17.3%, 7.5% in 2009, 4.1% in 2008 and 5.8% in 2007) and the UK and Ireland (15.8%, 22.0% in 2009, 9.3% in 2008 and 22.1% in 2007).

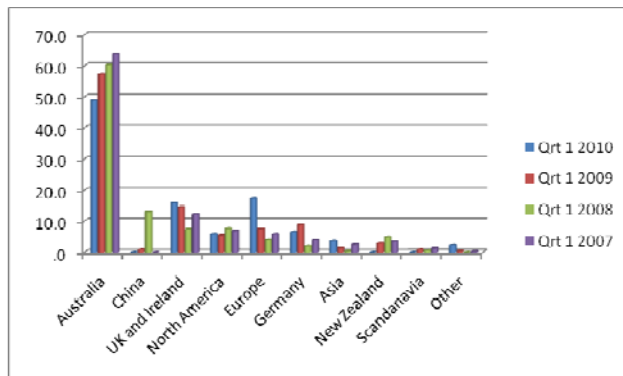


Figure 1: Origin of respondents, 2007-2010

Occupation

The occupations of respondents were:

- Professionals (27.9%; 32.8% in 2009, 22.8% in 2008 and 24.6% in 2007);
- Self-employees (12.9%; 11.5% in 2009, 9.7% in 2008 and 8.5% in 2007);
- Managers (10.7%; 10.9% in 2009, 6.2% in 2008 and 3.9% in 2007).
- Students (8.6%; 4.0% in 2009, 9.3% in 2008 and 6.3% in 2007);
- Public service (7.9%; 6.9% in 2009, 8.2% in 2008 and 7.3% in 2007) and;
- Retirees/semi-retirees (6.9% in 2009, 9.3% in 2008 and 24.3% in 2007).

Age of respondents

As shown in Figure 2, the main age groups of respondents were: 20-29 years (37.2%, 33.3% in 2009, 17.7% in 2008 and 18.7% in 2007), 30-39 years (19.7%, 19.6% in 2009, 17.1% in 2008 and 22.2% in 2007) and 50-59 years (16.8, 16.7% in 2009, 22.6% in 2008 and 18.2% in 2007).

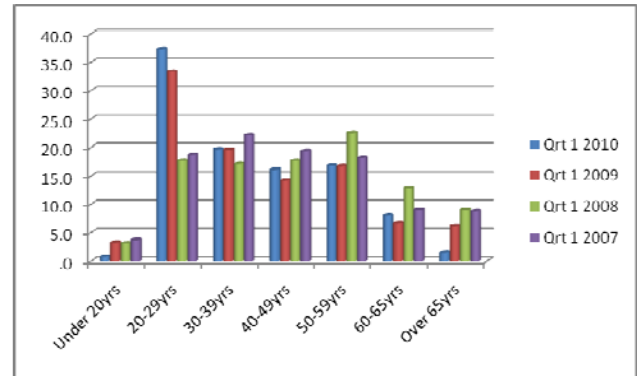


Figure 2: Age of respondents, 2007-2010

Travel Party

The composition of travel parties were:

- Couples (48.6%; 56.9% in 2009, 38.7% in 2008 and 55.6% in 2007);
- Travelling with friends (20.7%; 16.7% in 2009, 23.0% in 2008 and 17.6% in 2007);
- Family with children (14.3%; 8.6% in 2009, 12.9% in 2008 and 6.7% in 2007);
- Travelling with relatives (9.3%; 8.6% in 2009, 8.5% in 2008 and 6.3% in 2007);
- Alone (4.3%; 4.0% in 2009, 9.7% in 2008 and 6.0% in 2007) and;
- As part of a tour group (2.9%; 5.2% in 2009, 7.3% in 2008 and 7.4% in 2007).

Accommodation

Table 2 illustrates the most popular accommodation types used by respondents indicating an increase in the popularity of Backpacker accommodation, however a decrease in camping.

Table 2: Accommodation used by respondents, 2007-2010

(%)	Qrt 1 2010	Qrt 1 2009	Qrt 1 2008	Qrt 1 2007
Hotels/Motels	29.5	23.4	28.4	34.7
Apartments	22.3	25.7	9.3	14.8
Resorts	20.9	27.5	20.4	29.9
Backpackers	10.1	5.8	5.8	7.0
Friends/family	4.3	2.3	9.8	4.4
Caravan park	5.0	4.1	6.2	5.2
Camping	5.8	10.5	17.3	3.7
B&B	2.2	0.6	2.3	0.4

Previous visits and length of stay

72.1% of respondents indicated that this was their first visit to Tropical North Queensland (70.1% in 2009; 56.8% in 2008 and 68.8% in 2007). Those who had visited in the past had visited

between one and three times (94.3% compared with 94.8% in 2009 and 53.5% in 2008). The overall average length of stay was 7.53 nights, which was a decrease compared to Qrt 1 in 2009 with an average of 8.49 nights and an average of 10.77 nights in 2008 and fairly similar to Qrt 1 2007 where the average was 7.10 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, 2007-2010

(%)	Qrt 1 2010	Qrt 1 2009	Qrt 1 2008	Qrt 1 2007
Friends/family	43.6	47.1	35.4	35.2
Internet	37.1	43.9	21.9	24.6
Guide books	30.0	38.5	21.9	22.9
Travel agents	15.0	13.3	16.2	18.0
Been before	16.4	16.1	15.8	20.1
TV docs	11.4	14.4	7.3	6.3
Other	5.0	4.6	6.9	6.7
Ads print	2.9	9.2	6.2	9.9
Visitor centres	11.4	8.0	5.0	3.5
Ads on TV/radio	2.1	4.0	3.1	3.2

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 4.

Overall, the top five motives for Qrt 1 2010 were the same as in Qrt 1 2009 and 2008. These were:

- Visit the GBR (4.33, 4.36 in 2009 and 4.24 in 2008);
- Visit the rainforest (4.31, 4.34 in 2009 and 4.15 in 2008);
- Experience natural environment (4.20, 3.90 in 2009 and 3.90 in 2008);
- Walk in the rainforest (4.19, 3.04 in 2009 and 3.73 in 2008) and;
- Rest & relax (4.02, 4.13 in 2009 and 4.10 in 2008).

For domestic visitors, visiting the rainforest (4.36, 4.30 in 2009, 4.12 in 2008) was the key motivator for visiting the region, followed by resting and relaxing (4.32, 4.31 in 2009 and 4.35 in 2008) whereas visiting the Great Barrier Reef (4.47, 4.36 in 2009 and 4.72 in 2008) and seeing

Australian wildlife (4.30, 4.40 in 2009 and 4.18 in 2008) were major drawcards for internationals to the region.

Table 4: Motivations for travelling to the region, 2010

Motivation	Mean		
	Overall	Dom	Int'l
Visit the GBR	4.33	4.18	4.47
Visit the rainforest	4.31	4.36	4.27
Rest & relax	4.02	4.32	3.72
Experience the natural environment	4.20	4.13	4.26
See Australian wildlife	4.01	3.70	4.30
Walk in the rainforest	4.19	4.25	4.12
Visit a World Heritage area	3.71	3.82	3.61
Climate	3.54	3.50	3.58
Spend time with family	3.21	3.45	2.97
Snorkelling & diving	3.99	3.97	4.00

Last holiday and alternative destinations

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

- United States of America (7.1%, 6.9% in 2009, 2.7% in 2008);
- Spain (6.4%, 3.4% in 2009, 1.6% in 2008)
- Other Europe (6.3%, 1.1% in 2009, 1.9% in 2008);
- South Africa (4.3%, 1.7% in 2009, 0.0 in 2008);
- France (3.6%, 1.1% in 2009, 1.6% in 2008);
- Egypt (3.6%, 1.1% in 2009, 1.6% in 2008) and;
- Thailand (2.9, 1.7% in 2009, 1.9% in 2008).

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

- Melbourne (10.7%, 6.9% in 2009, 8.1% in 2008);
- Sydney (9.9%, 6.3% in 2009, 8.0% in 2008);
- Fiji (8.5%, 4.6% in 2009, 3.9% in 2008);
- Thailand (7.8%, 4.6% in 2009, 9.9% in 2008);
- New Zealand (8.6%, 1.7% in 2009, 9.3% in 2008);
- Darwin (2.1%, 1.1% in 2009, 3.9% in 2008) and;

- Tasmania (7.1%, 1.1% in 2009, 3.6% in 2008) and;
- Bali (5.7%, 5.1% in 2009, 0.0% in 2008).

Rainforest locations visited

The rainforest locations that respondents had visited or intended to visit are shown in Figure 3.

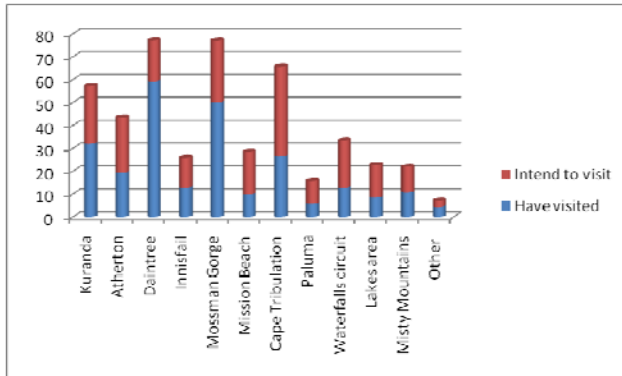


Figure 3: Rainforest locations visited and intended to visit, 2010

Figure 4 compares the rainforest locations visited by respondents in Qrt 1 in 2007, 2008, 2009 and 2010.

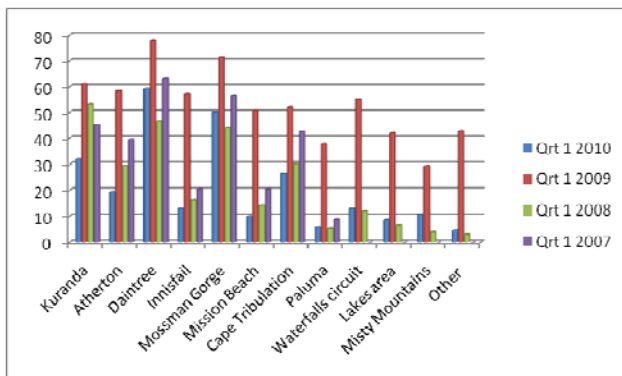


Figure 4: Rainforest locations visited, 2007-2010

Domestic and international visitors showed relatively similar rainforest location visitation patterns as shown in Table 5. The exceptions were lower numbers of international visitors went to Mossman Gorge and Kuranda; and higher numbers of international visitors went to the Daintree, the Atherton Tablelands and Mission Beach.

Table 5: Comparing rainforest locations visited and visitor origin, 2010

Location	Dom (%)	Int'l (%)
Daintree	70.7	84.0
Mossman Gorge	67.8	61.2
Kuranda	61.5	51.2
Atherton	32.1	54.5
Cape Tribulation	41.3	37.8
Mission Beach	30.0	40.0
Innisfail	47.6	53.3
Paluma	42.9	25.0
Lakes area	40.0	35.3
Waterfalls circuit	33.3	43.5
Misty Mountains	4.8	2.2

Time spent at rainforest locations

Visitors tended to spend:

- Less than ½ day at Cape Tribulation, Daintree, Mossman Gorge, Paluma, the Waterfall circuit, the Misty Mountains and the Lakes area.
- Half to 1 day travelling around Kuranda, Atherton Tablelands, the Innisfail region and the Mission Beach region.
- Greater than 1 day travelling around other rainforest locations.

Importance of Visiting Rainforests

Visiting the rainforest was considered fairly important to respondents with a mean of (4.18), (where 1 = not at all important, and 5 = very important). This was a fairly similar mean value compared to Qrt 1 2009 of 4.09 and a higher mean value than Qrt 1 2008 where the mean was 3.90, and a slightly lower mean when compared with Qrt 1 2007 where the mean was 4.25.

Similarly, visiting national parks while on holidays was also fairly important (mean=3.87), a very comparable mean from Qrt 1 2009 of 3.95; Qrt 1 2008 of 3.66 and Qrt 1 2007 of 3.69.

World Heritage rainforest knowledge

Overall, 58.1% of respondents were aware that these rainforests were designated World Heritage Areas before they visited the region compared with 56.5% of respondents in 2009 55.2% in 2008 and 62.1% in 2007.

71.2% (71.6% in 2009, 66.2% in 2008) of domestic visitors and 46.4% (43.2% in 2009, 39.25% 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 said 'yes' (97.0% compared with 98.8% of respondents in Qrt 1 in 2009, 94.6% in Qrt 1 2008 and 87.6% in Qrt 1 2007), with only 3.0% of respondents who said '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 6).

Table 6: Interpretation at rainforest sites, 2010

The environmental information...	Mean
Was interesting and clear	4.21
Influenced my site behaviour	3.72
Helped me to understand the ecological processes of this site	4.07
Influenced my attitude towards environmental conservation	3.78
The cultural information...	Mean
Was interesting and clear	4.06
Influenced my site behaviour	3.65
Helped me to understand the cultural significance of this site	4.00
Influenced my attitude towards cultural respect	3.86

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

Rainforest activities

Viewing rainforest scenery was the most popular rainforest activity to visitors, as indicated in Table 7.

Table 7: Interest in rainforest activities, 2010

Rainforest activities	%		
	Overall	Dom	Int'l
Viewing scenery	72.9	85.1	61.1
Viewing wildlife	69.8	67.2	72.2
Walking	82.1	85.1	79.2
Film/Photography	66.9	65.7	68.1
Swimming	44.6	47.8	41.7
Guided tour	28.1	25.4	30.6
Visiting info centres	49.6	52.2	47.2
General relaxation	52.5	61.2	44.4
Hiking	32.4	34.3	30.6
Bird watching	25.2	25.4	25
Socialisation	19.3	16.4	22.2
Reading site interp	36	35.8	36.1
4WD	8.6	15.2	2.8
Camping	10.8	7.5	13.9
Bike riding	7.9	9	6.9
Rafting	5.8	3	8.3

Overall satisfaction

Respondents were largely satisfied (mean=8.39) 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 Qrt 1 2009 with an overall satisfaction mean of 8.52 and more than Qrt 1 2008 with a mean of 7.89, and slightly less than Qrt 1 2007 with an overall satisfaction of 8.59.

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