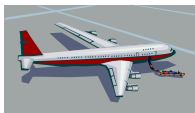


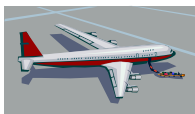
**RAINFOREST TOURISM
QUARTERLY REPORT # 1: AIRPORT EXIT SURVEY
TNQ Region
November 2006 – January 2007**

This quarterly report forms part of a series of reports presented by the Australian Government's Marine and Tropical Sciences Research Facility (MTSRF), represented in North Queensland by the Reef and Rainforest Research Centre, and James Cook University (JCU) on rainforest tourism in the Wet Tropics World Heritage Area (WTWHA). The data presented in this report summarise the results from the first quarter of data collection in the Tropical North Queensland (TNQ) region from November 2006 to January 2007. Overall, a total of 303 surveys were returned for this quarter from the Cairns Domestic Airport Terminal. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef and rainforest experiences.



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. Additionally, the study covers visitation to both the WTWHA and the Great Barrier Reef (GBR).

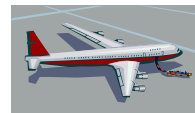


2. METHODOLOGY

The principle methodology for this research was visitor surveys distributed by the MTSRF research team at the Cairns Domestic Airport 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.

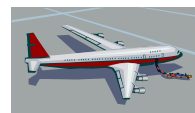
Data was collected on rainforest visitors' socio-demographic characteristics, travel patterns, motivations, activities, travel

expenditure, alternative destinations considered, and satisfaction. A total of 303 valid surveys were collected from domestic and international visitors at the Cairns Airport during this survey period.



3. LIMITATIONS

The major limitation was seasonality of visitor markets. The November to January quarter represents off-peak (or "wet season") visitation. Additionally, this quarter's survey did not include Japanese or Chinese visitors. These visitor markets will be included in subsequent quarters.



4. FINDINGS

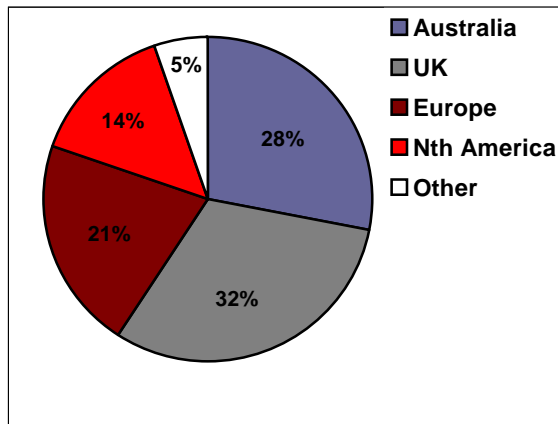
The sample consisted of 51.5% females and 48.5% males.

Origin of Respondents

The respondents were predominantly from overseas (72.0%), with Australian visitors accounting for only 28.0% (see Figure 1). International visitors were mainly from UK/Ireland (43.2%), Europe (29.6%) and North America (19.7%). The Australian visitors were mainly from Victoria (43.4%),

New South Wales (26.5%) and Queensland (13.3%).

Figure 1: Origin of Respondents (percentage overall).



Occupation

The most common types of occupation that respondents indicated were:

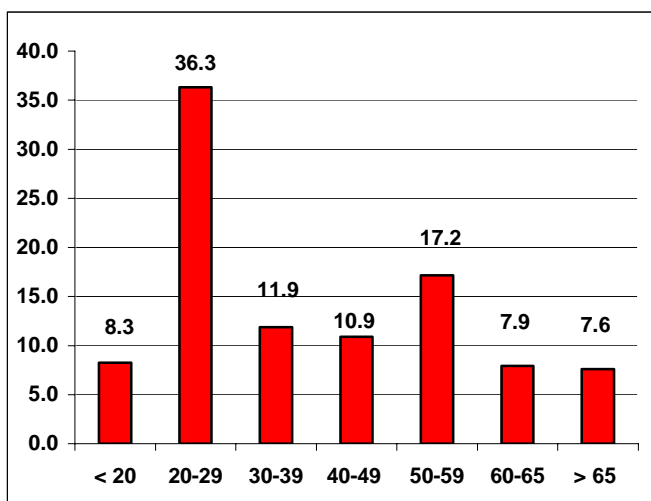
- Professionals (18.5%);
- Retired/Semi-retired (17.8%); and
- Students (18.2%).

Domestic visitors were mainly students (20.5%), professionals (22.9%) or retired/semi-retired (14.5%). International visitors were mainly students (17.8%), retired/semi-retired (17.8%) or professionals (16.9%).

Age of Respondents

As shown in Figure 2, the major age groups of respondents were 20-29 years (36.3%), 50-59 years (17.2%) and 30-39 years (11.9%).

Figure 2: Age of Respondents (percentage).



Travel Party

As shown in Table 1, respondents mainly travelled as a couple (48.2%), alone (19.8%) or with friends (14.9%).

Table 1: Travel Party.

Travel Party	Percentage		
	Overall	Domestic	International
Couple	48.2	44.6	49.3
Alone	19.8	24.1	18.3
With Friends	14.9	14.5	15.0

Previous Visits

75.5% of respondents said this was their first visit to Tropical North Queensland. Of those who had visited the region previously (24.5%), the majority (59.5%) had visited between one and three times in the past.

Length of Stay

The overall average length of stay in the region was 6.8 nights (Min=0, Max=70).

Domestic visitors averaged 6.8 nights, while international visitors averaged 6.7 nights in the region.

Accommodation

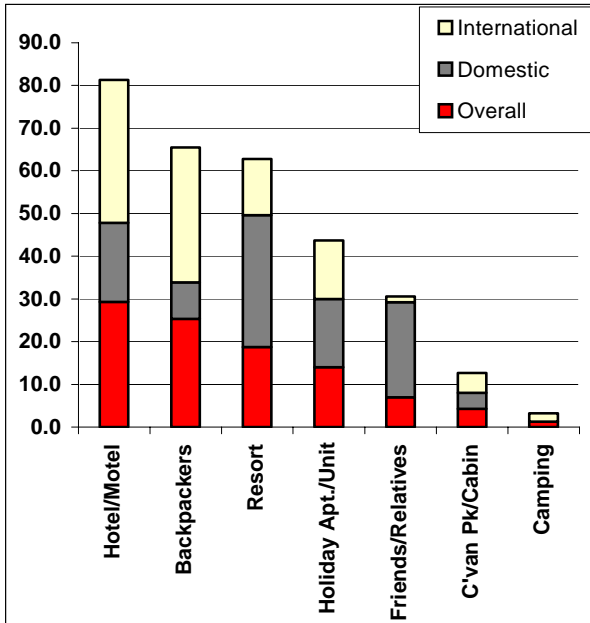
Figure 3 displays the accommodation types used by respondents overall, and by domestic and international visitors.

Overall, the main types of accommodation used were hotel/motel (29.3%), backpacker hostel (25.3%), resort (18.7%) and holiday apartment/unit (14.0%).

Domestic visitors tended to stay in resorts (30.9%), with friends/relatives (22.2%), in hotels/motels (18.5%) or in holiday apartments/units (16.0%).

International visitors tended to stay in hotels/motels (33.5%), backpacker hostels (31.6%), holiday apartments/units (13.7%) or resorts (13.2%).

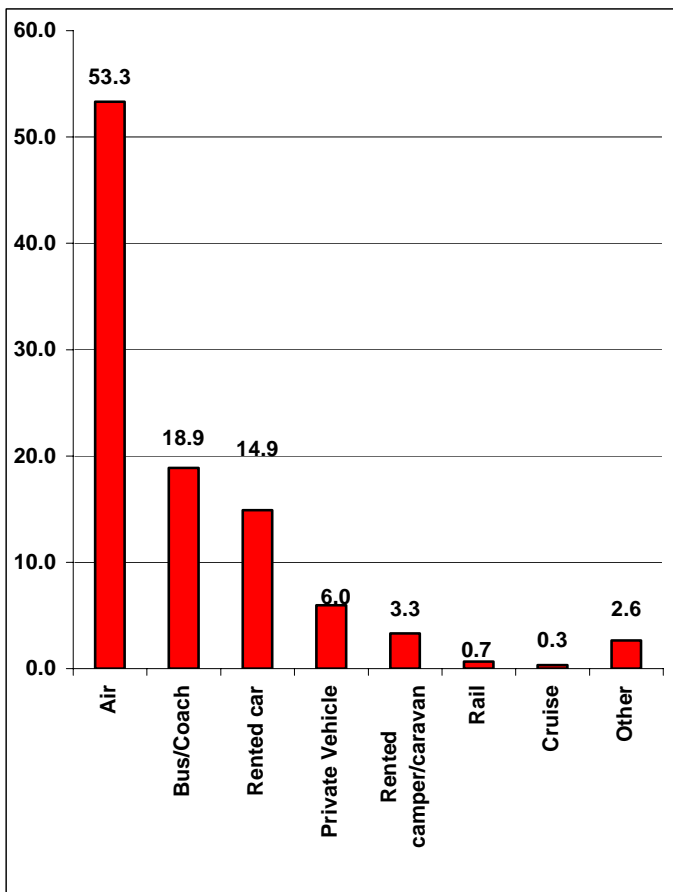
Figure 3: Accommodation (percentage).



Transportation

Overall, air transport (53.3%) dominated as the way of accessing the region (see Figure 4). Bus/coach (18.9%) and rented car (14.9%) were also popular modes of transport.

Figure 4: Transport to Region (percentage).



Domestic visitors mainly used air travel (59.0%), or rented car (16.9%) to access the region.

International visitors mainly used air travel (50.9%), while significant percentages used bus/coach (23.1%), or rented cars (14.6%).

Information

The most common sources of information used by visitors were friends and family (43.6%), tourist guide-books (38.3%), the Internet (36.0%), travel agent (18.8%) and 'have been before' (16.2%).

Motivations

The mean (measured on a scale of 1 = not at all important, to 5 = very important) for the most important motivations for visiting the region are listed in Table 2 (Top 7 motives only).

Overall, the most important motives were:

- Visit the GBR (M = 4.50);
- Visit the rainforest (M = 3.98) ;
- Experience the natural environment (M = 3.89);
- Rest and relax (M = 3.87); and
- Snorkelling and diving (M = 3.83).

As shown in Table 2, domestic and international visitors had slightly different mean ratings given to motives for visiting the region.

Table 2: Motivations.

Motivations	Mean		
	Overall	Domestic	International
Visit the Great Barrier Reef	4.50	3.95	4.71
Visit the rainforest	3.98	3.73	4.08
Experience the natural environment	3.89	3.73	3.95
Rest & relax	3.87	4.33	3.69
Snorkelling & diving	3.83	3.55	3.95
Climate	3.57	3.72	3.51
See Australian wildlife	3.81	3.00	4.10

Last Holiday Location

The most popular (single) destinations given in response to “where did you spend your last holiday?” were:

- USA/Canada (5.7%);
- Spain (5.3%);
- New Zealand (4.6%);
- France (3.6%); and
- Sydney (3.3%).

Alternative Destinations Considered

The most popular alternative (single) destinations considered when planning this trip are listed in Table 3 below. Australian destinations dominated the list, followed by locations in the Asia-Pacific region, and New Zealand.

Table 3: Alternative Destinations

Destination	Percentage
AUSTRALIA	
Sydney	15.2
Melbourne	8.3
Perth	6.6
Gold Coast	5.9
Darwin	5.0
ASIA-PACIFIC	
Thailand	8.3
Fiji	7.3
Bali	4.0
Samoa	3.3
Singapore	3.3
NEW ZEALAND	10.0
USA	5.0

Rainforest Potential Activities

Visitors were asked to indicate their level of interest in potential rainforest activities on a scale of 1 = not at all interested, to 4 = very interested.

As shown in Table 4, “short rainforest walks” were the most popular activity (M = 3.19).

As shown in Table 5, the mean rating for potential rainforest activities (in order of overall preferences) were similar for domestic and international visitors.

Table 4: Potential Activities

Activities	Mean
Short rainforest walk, e.g. ½ hour to 1 hour	3.19
Self-drive along a rainforest drive/road	2.62
Up to 1 day walk/hike – with tour guide	2.38
Up to 1 day walk/hike – unguided	2.10
Overnight walk/hike – with tour guide	2.00
Overnight walk/hike – unguided	1.65

Table 5: Domestic and International Visitor Mean for Potential Rainforest Activities

Activities	Mean	
	Domestic	International
Short rainforest walk, e.g. ½ hour to 1 hour	3.20	3.19
Self-drive along a rainforest drive/road	2.95	2.51
Up to 1 day walk/hike – with tour guide	2.24	2.45
Up to 1 day walk/hike – unguided	2.21	2.06
Overnight walk/hike – with tour guide	1.83	2.08
Overnight walk/hike – unguided	1.78	1.60

Expenditure

Respondents were asked to indicate the amount they had budgeted for expenditure for this holiday.

For ease of analysis, budgeted expenditure was grouped as shown in Table 6.

The majority of respondents were either “budget spenders” (45.5%) or “average spenders” (45.2%).

Table 6: Budgeted Expenditure

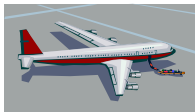
Expenditure Groups (n = 303)	Budget (\$)	Percentage
Budget Spenders	Under \$1000	45.5
Average Spenders	\$1001-\$5000	45.2
Large Spenders	\$5001-\$10,000	6.6
Super Spenders	\$10,001-\$40,000	2.6
Total		100.0

Domestic visitors tended to be “average spenders” (54.2%), or “budget spenders” (38.6%).

International visitors tended to be “budget spenders” (47.9%), or “average spenders” (41.8%).

Satisfaction Levels

Respondents were highly satisfied (M = 8.42) with their rainforest visits during their holiday in the region when rated on a scale of 1 = very unsatisfactory, and 10 = very satisfactory.



5. RAINFOREST AND REEF VISITATION

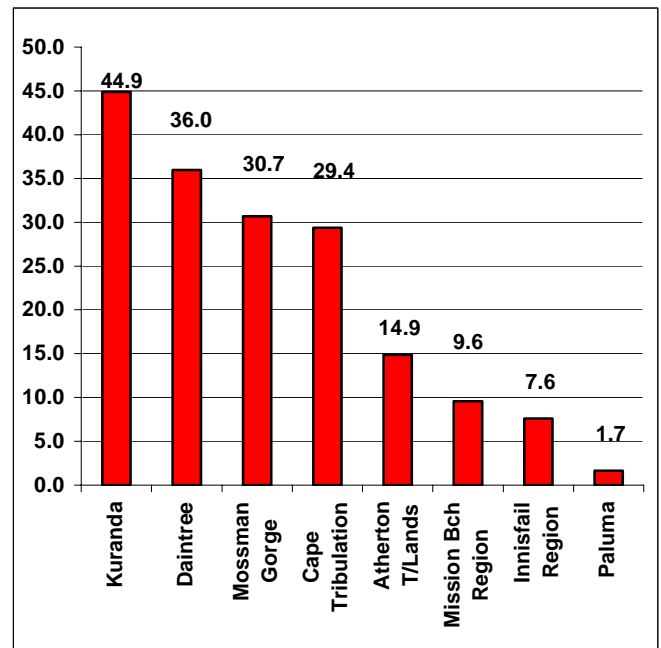
Overall, slightly more respondents visited the reef (78.9%) than the rainforest (71.1%) during their holiday in TNQ.

Rainforest Visitation

Respondents who said they had visited the rainforests during their holiday, were asked to indicate which locations they had visited.

As shown in Figure 5, the most popular rainforest locations were Kuranda (44.9%), Daintree (36.0%), Mossman Gorge (30.7%) and Cape Tribulation (29.4%).

Figure 5: Rainforest Locations Visited (percentage)



Why Visitors Didn't Visit Rainforest

Respondents who had not visited the rainforest during their holiday (28.9%) gave the following reasons:

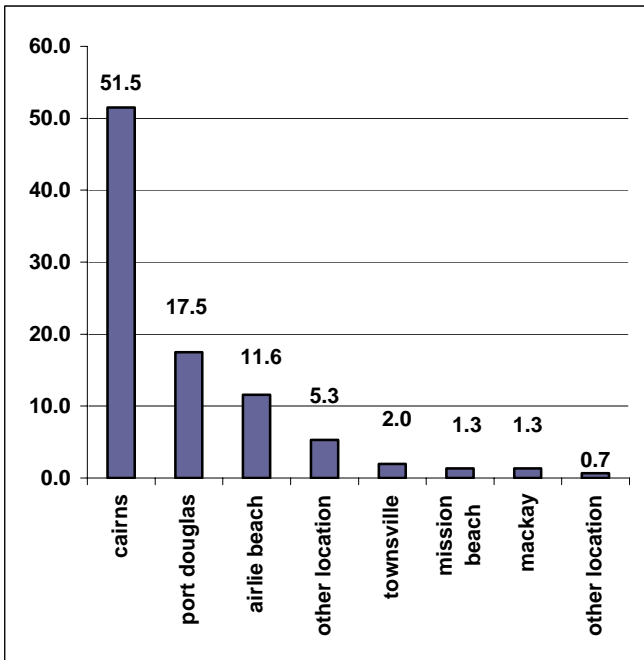
- “not enough time” (19.1%);
- “have been before” (4.0%);
- “not interested in rainforests” (2.6%); or
- “too expensive” (2.6%).

Great Barrier Reef Visitation

Respondents who said they had visited the GBR during their holiday, were asked to indicate which locations they had departed from in order to access the reef.

As shown in Figure 6, the departure sites that respondents indicated they used for accessing the GBR were mainly Cairns (51.5%), Port Douglas (17.5%), and Airlie Beach (11.6%).

Figure 6: Reef Locations – Departure Site (percentage).



Why Visitors Didn't Visit the GBR

The respondents that had not visited the GBR during their holiday (21.1%) gave the following reasons:

- "no time" (10.6%); and
- "have been before" (8.3%).

Locations Driven Through in Region

As shown in Figure 7, the main locations that respondents who used private/rented vehicles to drive in the region (24.2% of total sample) drove through were:

- Port Douglas (30.4%);
- Kuranda (23.1%);
- Innisfail (14.9%);
- Mission Beach (12.9%);
- Mareeba (12.2%); and
- Atherton (12.2%).

Figure 7: Locations Driven Through.

For further information about this project contact James Cook University:

Project Leader
 Professor Bruce Prideaux
Bruce.Prideaux@jcu.edu.au
 Phone: (07) 4042 1039

Project Manager
 Ms Fay Falco-Mammone
Fay.Falco@jcu.edu.au
 Phone (07) 4042 1762

For future updates, visit
www.rrrc.org.au/publications

