

TOURISM
QUARTERLY REPORT #2: RAINFOREST SURVEY
TNQ Region
April – June 2008

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 second quarter (Qrt) of data collection in the Tropical North Queensland (TNQ) region from **April to June 2008**. Overall, a total of **347 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 (April – June 2008) with the corresponding quarter for last year.



1. INTRODUCTION

MTSRF 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 key trends and drivers of Wet Tropics visitor patterns including their economic contribution.



2. METHODOLOGY

The methodology used in this research was visitor surveys collected by tour operators, tourist attractions and the 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.

Table 1: Survey locations and sample size, Qrt 2 2008

Location	Sample size
Northern	230
Cairns-Kuranda	93
Atherton Tablelands	24
Total	347



3. LIMITATIONS

During this period, limitations included difficulties encountered by visitor information centres in survey collection. Additionally, the surveys are in English and Chinese, leaving for instance the Japanese tourist market under-represented in this quarter's data.



4. FINDINGS

Gender and origin of respondents

The sample consisted of 49.6% females and 50.4% males. This differed slightly from Qrt 2 2007 where 53.5% of respondents were female and 46.5% were male.

Figure 1 shows that 60.2% of respondents were from Australia (63.7% in Qrt 2 2007) and overseas 39.8% (36.3% in Qrt 2 2007). International visitors were mainly from China 13.0% (0.0% in Qrt 2 2007), the UK and Ireland 7.3% (12.2% in Qrt 2 2007), and North America 7.6% (6.9% in Qrt 2 2007).

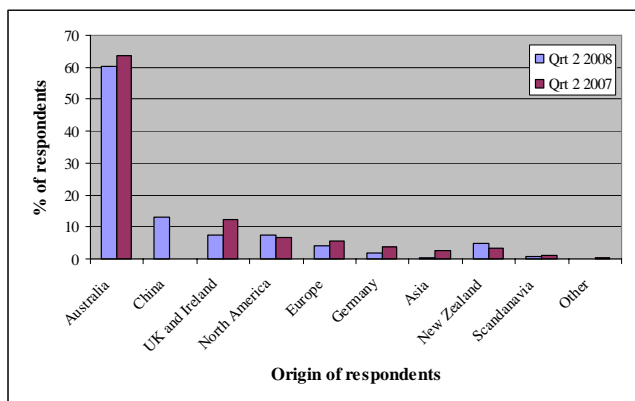


Figure 1: Origin of respondents, Qrt 2 2007 & 2008

Occupation

The major occupation groups of respondents were:

- Professionals 20.0% (26.3% in Qrt 2 2007);
- Self-employees 9.6% (9.0% in Qrt 2 2007);
- Retirees/semi-retirees 18.3% (17.6% in Qrt 2 2007);
- Students 9.9% (7.4% in Qrt 2 2007);
- Office staff/clerks 10.7% (5.3% in Qrt 2 2007) and;
- Managers 8.4% (9.2% in Qrt 2 2007).

Age of respondents

As shown in Figure 2, the main age groups of respondents were: 20-29 years 17.7% (18.7% in Qrt 2 2007), 40-49 years 17.7% (19.4% in Qrt 2 2007) and 50-59 years 22.6% (18.2% in Qrt 2 2007).

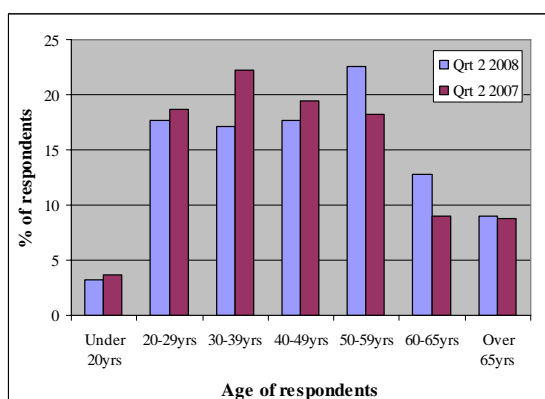


Figure 2: Age of respondents, Qrt 2 2007 & 2008 Travel Party

The composition of travel parties were:

- Couples 56.5% (58.2% in Qrt 2 2007);
- With friends 16.7% (10.3% in Qrt 2 2007);
- Family with children 6.3% (14.5% in Qrt 2 2007);
- Alone 3.5% (4.6% in Qrt 2 2007);
- With relatives 11.2% (9.2% in Qrt 2 2007);
- As part of a tour group 5.5% (3.0% in Qrt 2 2007) and;
- With a club only 0.3% (0.2% in Qrt 2 2007).

Previous visits and length of stay

65.1% of respondents indicated that this was their first visit to Tropical North Queensland (compared with 63.7% in Qrt 2 2007). Those who had visited in the past had visited between one and three times (85.7%). The overall average length of stay was 10.50 nights, which was a large increase on the Qrt 2 2007 average of 8.56 nights.

Accommodation and transport

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

Table 2: Accommodation used by respondents, Qrt 2 2007 & 2008

	Qrt 2 2008 (%)	Qrt 2 2007 (%)
Hotels/Motels	33.4	21.7
Holiday apartments	20.9	22.4
Resorts	21.8	26.3
Backpacker hostels	3.8	6.3
Friends and relatives	4.1	4.4
Caravan park/cabins	8.1	11.2
Camping	6.7	4.7
B&B	1.2	3.0

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

Table 3: Transport used by respondents, Qrt 2 2007 & 2008

	Qrt 2 2008 (%)	Qrt 2 2007 (%)
Air	45.8	44.4
Rented car	27.0	28.9
Bus/coach	6.4	5.3
Private vehicle	13.6	16.0
Rented campervan	5.8	2.8
Other	0.9	1.6
Cruise boat	0.0	0.2
Rail	0.6	0.7

Information sources

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

Table 4: Information sources used by respondents, Qrt 2 2007 & 2008

	Qrt 2 2008 (%)	Qrt 2 2007 (%)
Friends and family	35.4	40.5
Internet	27.1	28.0
Tourist guide books	29.1	28.3
Travel agents	15.3	14.3
Been before	22.8	20.9
TV documentaries	10.7	7.8
Other	4.9	4.8
Ads print	5.2	8.5
Visitor centres	8.1	7.5
Ads on the TV/radio	4.6	5.1

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 2 2008 were:

- Visit the rainforest 4.30 (4.39 in Qrt 2 2007);
- Rest & relax 4.18 (4.02 in Qrt 2 2007);
- Experience natural environment 4.15 (4.11 in Qrt 2 2007);
- Visit the GBR 4.15 (4.31 in Qrt 2 2007) and;
- Walk in the rainforest 3.97 (not asked 2007).

For domestic visitors, resting and relaxing was the key motivator for visiting the region (4.35) followed by visiting the rainforest (4.34), whereas visiting the reef (4.56) and rainforest (4.24) were major drawcards for internationals to the region.

Table 5: Top 10 motivations overall for travelling to the region, Qrt 2 2008

Motivation	Mean		
	Overall	Dom	Int'l
Visit the rainforest	4.30	4.34	4.24
Rest & relax	4.18	4.35	3.91
Experience the natural environment	4.15	4.21	4.07
Visit GBR	4.15	3.86	4.56
Walk in the rainforest	3.97	4.22	3.60
Visit a World Heritage area	3.92	4.01	3.81
Climate	3.89	4.01	3.70
See Australian wildlife	3.88	3.64	4.23
Visit beaches	3.60	3.59	3.62
Price matched my budget	3.40	3.56	3.17

Last holiday and alternative destinations

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

- Gold Coast (3.4%);
- United States of America (1.5%);
- Brisbane (2.0%);
- Tasmania (6.4%);
- Europe (2.9%) and;
- Thailand (2.9%).

A large number of alternative destinations were given by respondents.

Overall, the most popular alternative destinations considered when planning this trip were:

- New Zealand (4.0%);
- Sydney (4.2%);
- Darwin (3.3%);
- Fiji (3.0%) and;
- Tasmania (3.8%).

Rainforest locations visited

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

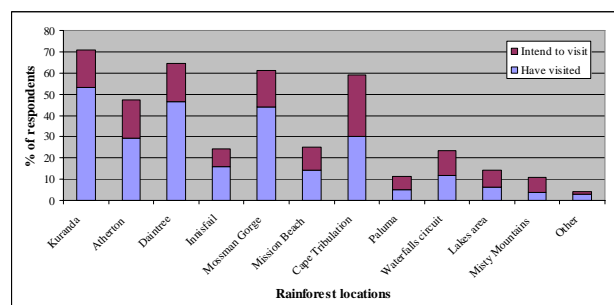


Figure 3: Rainforest locations visited and intended to visit, Qrt 2 2008

Figure 4 compares the rainforest locations visited by respondents in Qrt 2 in 2007 and 2008.

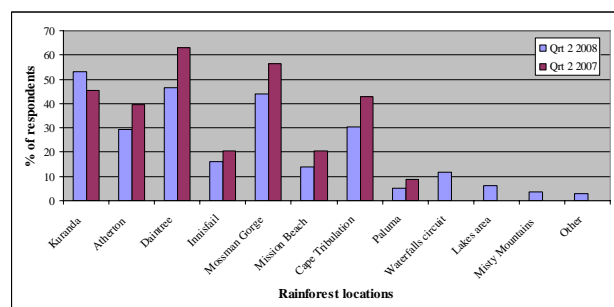


Figure 4: Rainforest locations visited, Qrt 2 2007 & 2008

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 2 2008

Location	Dom (%)	Int'l (%)
Daintree	55.6	34.3
Mossman Gorge	52.7	30.7
Kuranda	58.0	46.0
Atherton	40.1	13.1
Cape Tribulation	37.7	19.7
Mission Beach	14.5	13.9
Innisfail	17.9	12.4
Paluma	4.3	5.8
Lakes area	6.3	6.6
Waterfalls circuit	14.0	8.0
Misty Mountains	3.4	3.6

Time spent at rainforest locations

Visitors tended to spend:

- Less than ½ day at Mossman Gorge (72.5%), Innisfail (60.6%), Mission Beach (50.0%), Paluma (62.1%), Waterfall circuit (50.7%), Cape Tribulation (37.3%) and the Lakes area (42.4%);
- Half to 1 day in Kuranda (40.3%) and Daintree (38.7%) and;
- Greater than 1 day at Atherton (37.1%) and Misty Mountains (43.5%).

Importance of Visiting Rainforests

Visiting the rainforest was considered fairly important to respondents (mean=4.10, where 1 = not at all important, and 5 = very important). This was a slightly higher mean value than Qrt 2 2007 when the mean was 4.27.

Similarly, visiting national parks while on holidays was also fairly important (mean=3.85), a very comparable mean from Qrt 2 2007 of 3.83.

World Heritage rainforest knowledge

Overall, 63.8% of respondents were aware that the Wet Tropics rainforest was a designated World Heritage Area before they visited compared with 70.4% of respondents in Qrt 2 2007. 75.3% of domestic visitors and 47.3% 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 designated World Heritage Area, the majority of respondents said 'yes' (95.4% compared with 88.2% of respondents in Qrt 2 2007), with only 4.3% of respondents who said 'no' (0.7% in Qrt 2 2007), and a further 0.3% who said they were 'unsure' (11.1% in Qrt 2 2007).

Rainforest experience

Respondents were asked if they had visited other rainforests elsewhere in Australia and overseas. Only 32.5% of respondents stated that they had visited other rainforests overseas. These rainforests indicated were Brazil (4.1%) and the Amazon (4.9%), Malaysia (11.5%), New Zealand (4.9%), and Thailand (7.4%).

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 7).

Table 7: Interpretation at sites, Qrt 2 2008

The environmental information...	Mean
Was interesting and clear	4.33
Influenced my site behaviour	3.83
Helped me to understand the ecological processes of this site	4.30
Influenced my attitude towards environmental conservation	3.93
The cultural information...	Mean
Was interesting and clear	4.07
Influenced my site behaviour	3.71
Helped me to understand the cultural significance of this site	4.04
Influenced my attitude towards cultural respect	3.81

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 to visitors, as indicated in Table 8.

Table 8: Interest in rainforest activities, Qrt 2 2008

Rainforest activities	%		
	Overall	Dom	Int'l
Walking	79.6	87.7	67.4
Viewing scenery	75.1	79.3	68.9
General relaxation	57.7	68.0	41.7
Film/Photography	57.7	53.2	64.4
Viewing wildlife	55.9	57.6	54.5
Visiting information centres	42.0	39.9	46.2
Reading site interpretation	29.0	30.5	27.3
Guided tour	25.7	21.7	32.6
Bird watching	25.7	24.6	28.0
Swimming	24.3	24.1	25.0
Hiking	23.1	24.6	20.5
Socialisation	15.1	17.8	11.4
Camping	8.3	7.9	9.1
4WD	7.7	6.9	9.1
Rafting	5.3	7.9	1.5
Bike riding	3.6	4.4	2.3

Overall satisfaction

Respondents were largely satisfied (mean=8.33) 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 2 2007 with an overall satisfaction of 8.50.

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Associated publications

McNamara, K.E. and Prideaux, B. (2008) 'The who, how and what of rainforest tourism in Australia's world heritage wet tropics', *Asia Pacific Tourism Association Conference*, Bangkok.

McNamara, K.E. and Prideaux, B. (*under review*) 'From the one forest to the next: A profile of visitors to Australia's tropical rainforest and their past forest-based travel patterns', *Cambodian Journal of Tourism and Leisure Research*.

McNamara, K.E. and Prideaux, B. (*under review*) 'More than just pretty trees: The experiential and hiking market in Australia's world heritage wet tropics rainforest', *Tourism Geographies*.

McNamara, K.E. and Prideaux, B. (*under review*) 'Understanding your rainforest tourism market: A case of Australia's wet tropics', *Turismo em Análise*.